Assessment of the contribution of museums, libraries and archives to the visitor economy

July 2008
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ISBN 978-0-9560520-4-9

July 2008 (reprinted September 2008)

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1 Executive summary

Brief and purpose of the study

1.1 Roger Tym & Partners (RTP) was commissioned by the Museums Libraries and Archives Council South East (MLA South East) to undertake an economic impact assessment of museums, libraries and archives in the South East region focusing on tourism.

1.2 The study brief sets out two key research questions:

i How does the sector add to the tourism product?
   – The extent to which the sector forms part of the core product attracting both domestic and overseas visitors to the UK?

ii How much does the sector contribute to the regional and local economy through direct and indirect visitor expenditure?

1.3 The study therefore seeks to explore the role the sector plays in the wider visitor economy and quantify the economic value of the museums, libraries and archives sector.

Study process

1.4 The study process took shape in two parts; a telephone consultation exercise was carried out with tourism professionals to explore the value and role of the sector within the broader visitor economy. Secondly a set of visitor profiles were developed along with data relating to the number of visits to museums, libraries and archives in the South East in order to provide an economic impact assessment.

1.5 RTP obtained a selection of visitor surveys from museums, libraries and archives in the South East in order to develop visitor profiles to determine the proportion of visits attributed to:

- Local residents
- Tourist day trips; and
- Staying visits.
1.6 The visitor profiles were combined with visit count data and visitor expenditure data in order to estimate the overall spend attributed to visits to museums, libraries and archives. The information on visitor expenditure was coupled with an employment coefficient based on Tourism South East research to estimate the number of direct and indirect/induced full time equivalent (FTE) jobs likely to be supported. Direct employment in the museum, library and archive sector was obtained from the MLA South East/Social Informatics Research Unit Workforce Mapping Report, *The museums, libraries and archives workforce in the South East of England* (2005) and compared with the Annual Business Inquiry (2006).

**Study findings**

**Role of the museum, library and archive sector in tourism**

1.7 The museum, library and archive sector seeks to balance provision for local and community needs through cultural and learning activity and also as visitor attractions, which not only serve to promote the culture, history and heritage of the destination but also generate revenue for the area in which they are placed.

1.8 The South East has the largest proportion of museums of any English region; the sector includes a wide variety of museums with a number of large attractions and many small and medium sized facilities. Four of the region’s largest museum attractions are placed in the lower half of the region’s top 20 most visited attractions. Museums are considered to be a very valuable component of the visitor economy; they provide enjoyment and learning opportunities for visitors, contributing to the mix of attractions that makes a successful visitor destination. Consultations carried out as part of this study suggest that museums are part of the network of ‘things to see and do’ within a destination and are particularly complementary to heritage destinations such as Oxford and Canterbury. In this respect most museums are unlikely to form the primary motivation for generating a staying visit to a location; however the large and medium sized facilities will attract specific day visits.

1.9 The review of the wider South East visitor economy suggests that the South East is not perceived as a single visitor destination, but more a collection of separate destinations. The mix and spread of different sized
museums across the region helps to contribute to the tourism offer in the less well known/visited areas and helps to disperse tourism visits to areas that visitors may not otherwise visit.

1.10 Library facilities service a large volume of visits; however their role and services are primarily orientated towards resident and community use. As a result there are very few tourist visits to libraries. A small number of 'new breed' facilities in the South East such as the two Discovery Centres in Hampshire and the Jubilee Library in Brighton are thought to attract a wider variety of visitors, where cafes, galleries, exhibitions and performance events serve to attract both local users and tourist visitors.

1.11 It is thought that archives attract a significant proportion of tourist visits, where around 54% of visits are classed as either tourism day or staying trips. One of the key reasons for visiting South East archives is to research family history, which can attract visitors from a variety of areas. Despite this, the overall volume of visits is low compared to museums and libraries.

Economic impact of museums libraries and archives

1.12 The following table shows the headline figures from the economic impact assessment.

<table>
<thead>
<tr>
<th>Facility</th>
<th>Museums</th>
<th>Libraries</th>
<th>Archives</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total visitors/users</td>
<td>8,159,597</td>
<td>45,496,451</td>
<td>109,519</td>
<td>53,765,567</td>
</tr>
<tr>
<td>Total spend</td>
<td>£223,974,525</td>
<td>£3,988,304</td>
<td>£2,084,604</td>
<td>£229,981,260</td>
</tr>
<tr>
<td>Direct employment</td>
<td>4,090</td>
<td>10,504</td>
<td>651</td>
<td>15,245</td>
</tr>
<tr>
<td>Employment directly supported by visitor spend</td>
<td>3,224</td>
<td>60</td>
<td>23</td>
<td>3,307</td>
</tr>
<tr>
<td>Indirect &amp; induced + employment</td>
<td>1,369</td>
<td>25</td>
<td>10</td>
<td>1,404</td>
</tr>
<tr>
<td>Total employment</td>
<td>8,683</td>
<td>10,589</td>
<td>684</td>
<td>19,956</td>
</tr>
</tbody>
</table>

1 Economic Impact of libraries is restricted to the Bodleian Library in Oxford, although some other libraries may have a tourism role (Jubilee, Brighton and Discovery Centres in Hampshire) the visitor profile is not known. All other libraries are not considered to have a tourist role except as providers of local information and temporary membership.

2 Includes local users as well as staying and day visitors.

1.13 Tourist visitors to museums, libraries and archives spend £229,981,260 in the South East’s visitor economy. The vast majority of this expenditure is attributed to museum visits (£223,974,525 or 97%). Libraries and archives are thought to contribute £6m in visitor expenditure although the study has found that there are opportunities for greater contribution of these facilities.

1.14 Staying visitors contribute 60% of the total expenditure associated with visits to museums, libraries and archives. In the context of the overall South East visitor economy, museum, library and archive visits contribute around 2.25% of annual regional visitor spend.

Overall, museums, libraries and archives in the South East are estimated to support 15,245 jobs in direct employment within the facilities concerned, 3,307 through other businesses in receipt of visitor expenditure and 1,404 through indirect and induced effects. The total direct and indirect employment supported is 19,956 jobs.
2 Introduction

Summary of the brief

2.1 Museums Libraries and Archives South East (MLA South East) appointed Roger Tym and Partners in February 2008 to assess the contribution of museums, libraries and archives to the visitor economy of the South East.

Context for the study

2.2 The role of museums, libraries and archives provides an important component for regional and local life and also makes a contribution towards economic development, including the wider visitor economy.

2.3 Although there has been a cultural industries economic impact study on the South East\(^1\), it was on a general basis, with little focus thus far to assess the specific economic impact of museums, libraries and archives. MLA South East has identified a need for more up-to-date and a more thorough quantitative understanding of the sector's impact on tourism.

Purpose and objectives

2.4 The study findings will form part of an evidence base to advocate the value of museums, libraries and archives, furthering the sector's case for inclusion in local community strategies and Local Area Agreements. The study will also enhance understanding of visit patterns and provide a baseline for monitoring of future impact.

2.5 The study brief highlights two key research questions:

   i. How does the sector add to the tourism product?
     – The extent to which the sector forms part of the core product attracting both domestic and overseas visitors to the UK.

   ii. How much does the sector contribute to the regional and local economy through direct and indirect visitor expenditure?

2.6 The majority of the quantitative impacts have been derived from existing visitor surveys and counts. There are some constraints stemming from shortcomings in the available data, which are discussed later.

\(^1\) David Powell Associates (2002) Creative and Cultural Industries: An Economic Impact Report for South East England
Definitions

MLA South East and who it represents

2.7 The Museums, Libraries and Archives Council (MLA) is the lead strategic agency for museums, libraries and archives in England. The overarching body is a nondepartmental public body of the Department for Culture, Media and Sport. MLA South East is one of nine independent regional partners in the England-wide MLA Partnership.

2.8 Currently, MLA South East is core funded by MLA. This funding will cease in April 2009, by which time MLA South East and most of the other regional agencies will have been wound up and a single national MLA will have replaced the MLA Partnership.

2.9 MLA South East is the strategic development agency for museums, libraries and archives in the South East with a specific remit to build access to collections and resources while also building knowledge, supporting learning, inspiring creativity and celebrating identity.

2.10 MLA South East works towards MLA’s three strategic priorities for 2008–11 of:
- Learning and skills;
- Communities;
- Excellence.

Visitor economy

2.11 The term ‘Visitor Economy’ is increasingly being used by those involved in developing and marketing destinations in replacement for ‘Tourism’. Despite wide-spread use there is no accepted definition for the visitor economy.

2.12 Traditionally tourism is defined as the set of activities of a person traveling outside their usual environment for not more than one year for leisure, business and other purposes. This definition helps to describe tangible, quantifiable and transactional events in terms of visitor impacts but a successful tourism destination depends on many other factors which are intangible and qualitative in nature.

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2 South West Tourism definition consistent with the UN World Tourism Organisation (longer definition)
2.13 Day visits are defined as round trips which start from and return to home for leisure purposes which last three hours or more and are not taken regularly.*

2.14 Economic activity is still a core component of the visitor economy but it also embraces the full range of elements which make for a successful visitor destination. VisitBritain ascribe the many ‘touch points' tourism has with the wider economy as being key components of the visitor economy. It encompasses all of the things that attract visitors including, accessibility of the destination, natural environment, iconic buildings, retail and leisure facilities, heritage and culture, customer service and skills and infrastructure.

2.15 The visitor economy therefore refers to the place-centered concept of a destination and includes the environs, services and infrastructure that play an important part in the visitors' experience.

Visitors

2.16 Based on the definitions above, we have split visitors to museums, libraries and archives into:

- People staying overnight on vacation, business, visiting friends and relatives or other purposes;
- People on irregular non-local trip day trips of over three hours in duration.

2.17 In practice we have had to make some assumptions to fit visitors into these two groups and this is discussed in the appropriate sections.

2.18 Based on this split, the following impacts will be determined:

- The employment impacts of the spending by staying visitors;
- The employment impacts of spending by non-local day visitors.

2.19 The study will therefore exclude regular local users of museums, libraries and archives.

Methodology

2.20 This section sets out the methodology employed for undertaking the study. It follows a straightforward process of qualitative and quantitative information gathering followed by review, analysis and presentation of results.

* As noted in the Leisure Day Visits Survey 2005, Countryside Agency
How does the sector add to the tourism product?

2.21 The first part of the study takes the form of a qualitative assessment, establishing the sector’s contribution to the regional and local tourism offer. A set of consultations were undertaken with Tourism South East, local authority tourism manager/officers to extend the impacts identified from the quantitative assessment (discussed below). The consultations were employed to identify the importance of museums, libraries and archives to the visitor offer and the extent to which the sector is being used to generate economic or regeneration activity.

Economic impact assessment

2.22 The second part of the study uses a quantitative approach in order to assess the economic impact of museums, libraries and archives in the visitor economy. The methodology applied is set out in the following sections.

Direct employment in museums, libraries and archives

2.23 Direct employment in museums, libraries and archives comes from a detailed research study commissioned by MLA South East. The workforce mapping report\(^5\) uses a wider definition (than the Annual Business Inquiry for example) for employment to capture an estimate for the total workforce in museums, libraries and archives.

2.24 The Annual Business Inquiry provides a robust estimate for employment, however their allocation of employees to sectors is based on the type of sector that the business or organisation operates within, for example a school librarian is will be classified as employed in education rather than libraries. As a result the ABI figures tend to underestimate the actual number of people working in museum, library and archive roles.

2.25 It is acknowledged that there is significant voluntary activity in the sector, the MLA South East’s Workforce Mapping Study identified a further 4,845 voluntary workers, where 88% of these are thought to work in museums. Despite their important role, voluntary workers have not been used as part of the economic impact assessment in this study.

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**Economic contribution through visitor expenditure**

2.26 In order to make a robust assessment of the economic contributions through off-site visitor expenditure it is necessary to have a detailed knowledge of the following:

- The number of visitors to museums, libraries and archives;
- Visitor profiles for visitors to museums, libraries and archives – including the breakdown between, staying visitors, day visitors, local users and overseas visitors;
- Daily spend figures per head;
- Economic multiplier effects – the amount of tourism related spend to support additional employment.

2.27 MLA South East was able to provide recent visitor count data to nearly all museums in the region and visitor counts for libraries and archives at county/Unitary Authority aggregated levels.

2.28 The scale of museums, libraries and archives varies across the South East. On the one hand there are a limited number of large museums attracting in excess of 200,000 visitors per annum, along with a plethora of small museums receiving less than 5,000 visits a year. RTP have categorised museums, libraries and archives into bands which relate primarily to ‘tourism significance’. The band levels or ‘tourism significance’ depends on the volume of visitors, supplemented by consideration of whether the facility is in a tourist location and the understanding about the proportions of visitors who are non-local.

2.29 The tourism 'significance' bands are:
- Top band – over 80,000 visits per year;
- Middle band – 20,000 to 80,000 visits per year;
- Low band – under 20,000 visits per year.

2.30 In practice the highest levels of tourism significance are found in the larger museums and one of the libraries. The remainder of the libraries are then in the lowest band of tourism significance. This is discussed in more detail later.
Visitor profiles

2.31 On behalf of RTP, MLA South East contacted all of the Registered/Accredited museums in the region (approximately 265) by email requesting information on the profiles of their visitors. This resulted in 22 surveys and email responses from South East museums of which twelve were able to provide information on their visitors and eight sources were able to provide splits between staying and day visitors for this study.

2.32 Only a few museum organisations in the South East were able to supply information on visitor profiles. The type of information collected by museums varied, where questions tended to be based upon their own needs and requirements. Many of the visitor surveys do not specifically ask about the profile of their visitors. As a result some of the profiling has been derived from questions such as – Where do you live? What is your postcode area? While it has been possible to make a reasonable assumption about the type of visit, especially where users are local or day visitors, this section of the impact assessment would benefit from a greater sample of visitor profiles. This ‘data gap’ is found to be common in the UK and has been reported in other studies6.

2.33 It is worth noting that some of the information obtained came from museums on the Isle of Wight. We have decided not to use this as part of the regional profiles as it is clear that the pattern of tourism on the Isle of Wight is not typical of most other locations in South East England. Instead, it shares characteristics with more remote UK locations such as the west of Cornwall.

2.34 It is clear that this part of the study would benefit from a subsequent larger scale exercise with some primary research to confirm the findings based on this initial data collection exercise.

2.35 For libraries there is very little information available on tourism user profiles, although we have been able to use some information from elsewhere in the UK. A study looking at the role of museums, libraries and archives in the East Midlands7 found that based on three library profiles 100% of library users are local residents. This is likely to be the case in most regional and town libraries except where tourist information centres are located with the library or where certain exhibitions have broader appeal.

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7 Ibid
2.36 The 2006 Survey of Visitors to UK Archives provides information on the profile of visitors to these facilities.

*Daily spend for tourist visitors*

2.37 The information that was obtained on visitor numbers and visitor profiles has been combined with Tourism South East's Volume and Value of Visits data which provides average spend values for staying and day visitors to give an estimated economic impact assessment of museums, libraries and archives in the South East. The discussion of visitor spend includes consideration of the additionality of the visitor expenditure.

2.38 The constraints of the information available has meant that it is unclear to what extent museums, libraries and archives had motivated visitors to stay in the region as opposed to serving visitors who would have been in the region anyway. As a result it is very difficult to identify the deadweight element of spend attributed to museums, libraries and archives visits. However, a visit to a museum, library or archive is likely to be a significant component of a visitor’s day. On this basis we have 'claimed' the daily spend associated with the different trip types, rather than the whole trip expenditure across a number of days. The remainder of the expenditure during the remaining days of the trip is therefore assumed to be the deadweight. For some smaller facilities this may be an overestimate while for other more significant facilities that may have been the primary motivation for a trip, it may be an underestimate. For this study we have assumed that the two influences will balance each other although clearly this would benefit from collecting further specific information.

2.39 The effect of displacement is difficult to quantify. While none of the available survey work is able to identify what the visitors would have done if they had not visited the museum, library or archive, it seems likely that some other economic activity may have taken place, particularly for staying visitors. However, while there may be displacement on a regional basis, it is likely that there will be little or no displacement on a local basis, as there may be few local alternatives. Therefore, while we recognise the likely influence of displacement, we are not able to quantify it.

2.40 Leakage is also difficult to quantify. We suspect that some of the visitor expenditure associated with a trip will have been made outside the region – such as purchases of fuel or travel tickets. However we are not able to quantify leakage.
2.41 By dividing the overall expenditure for staying and day visits to the South East by the number of staying nights/day trips made it was possible to ascertain an average net daily spend per head. This worked out to be:

- £46.31 for staying visitors;
- £31.55 for day visitors.

**Direct and indirect employment**

2.42 A review of 13 tourism economic impact models from local authorities in the South East was conducted to sample the different levels of tourism expenditure required to support one full time equivalent job. Five sample studies\(^8\) were able to provide the necessary information and a weighted coefficient was obtained for direct and indirect/induced full time equivalent jobs.

2.43 The expenditure values attributed per FTE job are given in the table below.

**Table 1: Employment FTEs resulting from tourism expenditure in South East England**

<table>
<thead>
<tr>
<th></th>
<th>Staying visitors</th>
<th>Day visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitor expenditure</td>
<td>£57,420</td>
<td>£102,676</td>
</tr>
<tr>
<td>required for one</td>
<td></td>
<td></td>
</tr>
<tr>
<td>direct FTE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visitor expenditure</td>
<td>£140,227</td>
<td>£220,441</td>
</tr>
<tr>
<td>required for one</td>
<td></td>
<td></td>
</tr>
<tr>
<td>indirect/induced FTE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2.44 Using this information it is possible to calculate the likely number of jobs that would be supported by museums, library and archive visitor expenditure. The overall expenditure is divided by the amount of expenditure required for one FTE job.

2.45 Note that expenditure by visitors will be across a variety of parts of the economy, including accommodation (for staying visitors) catering, retail, entertainment and transport.

2.46 Employment in museums libraries and archives is drawn from the MLA South East's workforce mapping report (2005)\(^9\).

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\(^8\) Five samples were – Oxford, Lewes & Wealden, Eastbourne, West Berkshire and Southampton Economic Impact of Tourism Reports (various dates between 2004 & 2007)

Methodological concerns

2.47 Due to the lack of quality data on the profile of visitors to museums, libraries and archives, estimates on the split between staying visitors, day visitors and local users are tentative. This is particularly the case for small museums in the sub 20,000 visits band where only two sources have been used. However, based upon the information that has been received it has been possible to make an assessment for the following:

- The proportion of museum, library and archive visitors who are staying visitors (domestic and overseas), and non-local day trip visitors;
- Total levels of expenditure generated by these staying and day visitors to museums, libraries and archives in the South East;
- The number of FTE jobs associated with visits and spend related to museums, libraries and archives;
- The share of economic activity attributed to museum, library and archive visits within the overall visitor economy of the South East region.

2.48 We recommend that when time and resources allow, further information on the profile of visitors to different facilities is collected along with information on the importance of the facility in motivating a visit to the area.

2.49 In addition there are issues relating to the additionality of the visitor expenditure. These issues extend to the wider consideration of the economic impact of tourism and we suggest that the MLA South East remains aware of Tourism South East, VisitBritain and DCMS thinking on this issue as it develops. The DCMS work on Tourism Satellite Accounts may provide further guidance in the future.

Note on tourism significance

2.50 It is acknowledged that ‘iconic’ or flagship attractions can act as the primary motive for visits to an area. These attractions hold a high level of tourism significance and hence are important to a region in terms of growing tourism and in relation to a region's broader image.

2.51 DTZ have undertaken some research into iconic attractions\(^\text{10}\), which identifies that there are very few iconic attractions and that it is difficult

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\(^{10}\) DTZ (2005) Iconic Tourism Projects in the South West of England, SWRDA – note iconic attractions do not consider natural assets such as National Parks etc
to divide iconic and non-iconic attractions. The study identified that the South East is thought to have four of the UK’s top 20 iconic attractions which are: Legoland Windsor, Windsor Castle, Canterbury Cathedral, Wisley Garden.

2.52 It is thought that iconic attractions possess a number of characteristics, the most important being:

- Brand bigger than location – the attraction’s brand becomes better known that the precise location of the attraction e.g. Eden Project;
- Propensity to draw new visitors – The attraction becomes the purpose of the visit, rather than incidental to the visit;
- Wide appeal – The attraction is not specific to a particular interest group/religion/cultural group e.g. London Eye;
- Genus Loci (spirit of the place) – the attraction is in a unique location, which is the very essence of what it is e.g. the site of the Battle of Hastings.

2.53 Most of the museums, libraries and archives are not iconic attractions and therefore will not form the primary motive for visits to the South East region. However some of the larger ones do form part of a secondary tier of attractions, especially where there is a cluster of attractions or where they are located within close proximity to an iconic attraction. The network of Oxford University museums and the Mary Rose Trust within Portsmouth Historic Dockyard are good examples of attractions which are part of a cluster which collectively attract significant volumes of visitors.

Format of the report

2.54 Following this introduction the rest of the report is set out in the following sections:

- Section 3: Museums, libraries and archives in South East England – the role of museums, libraries and archives as visitor attractions;
- Section 4: Economic impact of museums;
- Section 5: Economic impact of libraries;
- Section 6: Economic impact of archives;
• Section 7: Summary economic impact of museums, libraries and archives on the visitor economy – a review of the preceding chapters and overall contribution of museums, libraries and archives to the visitor economy;

• Section 8: Key findings and conclusion – review of the study, recommendations for future research and concluding remarks.
3 Museums, libraries and archives in South East England

Introduction

3.1 This section provides a review of the tourism ‘offer’ in the South East region and also seeks to highlight the role played by museums, libraries and archives as visitor attractions, and the value they add to the economy, society and culture.

3.2 The information presented in this section draws upon a review of existing strategies and documents (referenced in the text) and a number of stakeholder interviews with tourism professionals in the South East region. A list of consultees is presented in the appendix.

Museums

3.3 Museums are generally well suited to the role of sustainable tourism; they can offer cultural experiences and are able to host a large number of visitors. For many museums there is an important balance to be met through their roles as both community based centres for local history, conservation and culture, and visitor attractions that generate revenue for the area.

3.4 In line with the increasing importance placed on the role of tourism in economic development, museums are under increasing competition with other leisure, entertainment and cultural attractions.\(^\text{11}\)

3.5 Market research undertaken by VisitBritain\(^\text{12}\) has shown that cultural activities (e.g. museums) have higher proportions of overseas visitors than other sectors (e.g. zoos, gardens).

3.6 The South East region has the largest share of museums out of the English regions, with around 265 Registered/Accredited museums. The South East's museum ‘offer’ includes\(^\text{13}\):


\(^{12}\) VisitBritain (2008) *Britain Inbound – Overall Market Profile*

\(^{13}\) All museum facts from: *Key Facts – Museums in the South East* (2008) MLA South East
- 14 museum collections ‘Designated’ as being of national and international importance, including natural history, science, art and archaeology. The list includes the Mary Rose Trust at Portsmouth, The National Motor Museum Trust at Beaulieu, the University of Oxford Museums, including the Museum of Natural History, History of Science Museum and the Pitt Rivers Museum;

- A rich selection of defence heritage museums, especially regimental and armed service museums;

- Significant high profile museum attractions such as the Historic Dockyard at Portsmouth, which was the 2005 Large Visitor Attraction of the Year, the Royal Pavilion Art Gallery and Museum in Brighton and the Ashmolean Museum of Art and Archaeology;

- Major University museums at Oxford and Reading;

- The major proportion of South East museums are independent charitable trusts (38%) with 34% being of Local Authority operation.

**3.7** There are around 21 museums in the South East that receive in excess of 100,000 visitors per year. Three fall into the second tier the top 20 overall attractions in the South East region. The largest museum attractions (by visitor count) are listed in table 2 below.

**Table 2: Top 20 museums by visitor count August 06 – July 07**

<table>
<thead>
<tr>
<th>Museum attraction</th>
<th>Visits</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Royal Pavilion Art Gallery &amp; Museum</td>
<td>270,077</td>
<td>Brighton</td>
</tr>
<tr>
<td>2 Ashmolean Museum of Art &amp; Archaeology</td>
<td>238,910</td>
<td>Oxford</td>
</tr>
<tr>
<td>3 Banbury Museum</td>
<td>236,962</td>
<td>Banbury</td>
</tr>
<tr>
<td>4 National Motor Museum</td>
<td>233,328</td>
<td>Beaulieu, New Forest</td>
</tr>
<tr>
<td>5 Osborne House, Isle of Wight</td>
<td>223,972</td>
<td>IoW</td>
</tr>
<tr>
<td>6 Oxford University Museum of Natural History</td>
<td>212,864</td>
<td>Oxford</td>
</tr>
<tr>
<td>7 Brighton Museum &amp; Art Gallery</td>
<td>204,733</td>
<td>Brighton</td>
</tr>
<tr>
<td>8 Royal Armouries Museum, Fort Nelson</td>
<td>201,208</td>
<td>Fareham</td>
</tr>
<tr>
<td>9 Mary Rose Trust</td>
<td>200,801</td>
<td>Portsmouth</td>
</tr>
<tr>
<td>10 National Trust, Polesden Lacey</td>
<td>186,664</td>
<td>nr Dorking</td>
</tr>
<tr>
<td>11 National Trust, Nymans</td>
<td>175,125</td>
<td>nr Haywards Heath</td>
</tr>
<tr>
<td>12 National Trust, Chartwell</td>
<td>162,724</td>
<td>Westerham, Kent</td>
</tr>
<tr>
<td>13 Royal Naval Museum</td>
<td>155,656</td>
<td>Portsmouth</td>
</tr>
</tbody>
</table>
3.8 Information collected during this study suggests that museums are considered to be a very valuable resource to a destination’s overall visitor ‘offer’ of attractions and products. They are thought to be particularly complementary to heritage destinations like Oxford and Canterbury and form part of the network of different ‘things to do’ for visitors. Museums are unlikely to form the primary reason for generating a staying visit to a location and in this respect they are not considered to be top tier attractions but nonetheless they provide a positive experience for visitors and would leave a considerable gap without them.

Libraries

3.9 Libraries, both public and commercial, are an important resource for local communities. They act as the holders, managers and access points for knowledge, providing a safe and freely available facility for information, education, training, life-long-learning and social inclusion. There are thought to be over 2,500 libraries in the South East region. The 559 public local authority libraries are supported by private collections held in university libraries, special/cultural libraries such as those in museums and archives, and a large selection of school libraries.

3.10 The role and impact of libraries is very much focused on the needs and requirements of local users and communities:

- Approximately 58% of all adults in the South East are registered users of their local library with 48% of all adults visiting a library at least once per year;

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14 All facts are from the source: *Key Facts – Libraries in the South East* (2008) MLA South East (unless otherwise stated)
Public libraries in the South East received 45.5 million visits in 2006–07\(^\text{15}\); The Lottery funded People’s Network for Libraries has enabled users to have over 4 million hours of access to the internet through 3,500 computer terminals in 460 libraries in the South East. The initiative is part of government targets to increase the provision of information and opportunities for lifelong learning.

3.11 Flagship libraries in the South East include the Bodleian in Oxford and the new Jubilee Library in Brighton. The Bodleian is one of the oldest libraries in Europe and is the main research library of the University of Oxford. The Bodleian Library collection is second only in size (in England) to the British Library and in addition they now hold over 200,000 digital records online\(^\text{16}\). The Bodleian is probably the only library facility in the South East that plays a significant role as a tourist attraction, receiving 131,701 tourist visits in 2006\(^\text{17}\). The visitor offer includes guided tours to some of the oldest library rooms, including the Medieval Library which has hosted numerous famous scholars such as Oscar Wilde, C S Lewis, J R R Tolkien\(^\text{18}\) and a number of kings, Nobel Prize winners and British prime ministers.

3.12 The Jubilee Library in Brighton opened in 2005. The new £14m landmark building was part of the large-scale regeneration project for Jubilee Square. The library offers a modern contemporary space for information provision with a number of major art installations. In addition the library is an exemplary building for energy efficiency and also provides conference facilities for commercial and community use.

3.13 Surrey’s Woking Library and the Jubilee Library are among the top 20 most visited public libraries in England with around 700,000 and 900,000 annual visits respectively; in addition Milton Keynes’ Central Library attracts comparably high visitor numbers (636,000 in 2006–07).

3.14 The current role of libraries is generally one that serves local user needs but can act as a source of information for visitors to a town or city and many libraries are able to offer temporary membership to visitors.

\(^{15}\) CIPFA Local Authority Library Actuals 2006–07
\(^{16}\) Bodleian Library Website(s) http://www.ouls.ox.ac.uk/bodley & http://shop.bodley.ox.ac.uk/
\(^{17}\) VisitBritain (2006) \textit{Visits to Visitor Attractions}
\(^{18}\) Bodleian Library Website (Ibid)
Changing delivery for libraries

3.15 There are a number of examples in the South East where new library developments are widening their appeal and contributing towards the regeneration of town centre locations and enhancement of the visitor economy.

3.16 Hampshire County Council has redeveloped two of their main libraries under a Discovery Centre brand, one in Gosport and one in Winchester. This concept not only revitalises the traditional library functions, it has also introduced exhibition/gallery space, cafes and provides a venue for events and performance. The Winchester Discovery Centre has hosted a King Alfred exhibition. It was reported that the exhibition was actively marketed as an attraction serving both local users and a number of specific visits to the exhibition\(^{19}\).

3.17 The Jubilee Library in Brighton and to some extent the Discovery Centre at Gosport have proven to be exemplary in the use of public facilities for regeneration purposes whilst also enhancing the visitor economy. The iconic architecture, location and quality setting of the Jubilee Library services a number of visitors to the site and the exterior area of public space is used to engage visitors through entertainment, performance and theatre. In a similar respect the Winchester Discovery Centre is part of a cultural quarter where a complementary mix of attractions has been developed in the form of a theatre, bars and restaurants that now offers a mixture of leisure and entertainment uses.

3.18 In addition, Canterbury’s Library and Royal Museum (co-located) is to undergo a refurbishment in 2009 which aims to develop a wider audience and increase engagement with residents and visitors. The Library will benefit from a number of ‘Discovery Centre’ style improvements and co-location with the museum will maintain a footfall of tourist visitors to the site.

3.19 However, outside these new library models there is little evidence of tourism use of libraries beyond their value as information points. These examples of a ‘new breed’ of library where there is potential to appeal to wider audiences, are likely to increase tourism visits to libraries. These examples tend to be part of wider projects for regeneration and are likely to apply to main town centre libraries only.

\(^{19}\) Anecdotal evidence from consultation with Hampshire County Council representatives
Archives

3.20 Archive repositories manage, store and provide access to a wealth of historical knowledge and provide opportunities for tracing ancestors and learning about social history. Through their activities they help to preserve culture and heritage. Archives are an important resource for the community, where they can be used as tools for building identity and cohesion and also as learning resources, where people actively gain knowledge through operating and using archives.

3.21 The archives domain is significantly smaller, in terms of visitor numbers, than that of museums and libraries with around 110,000 visitors to South East archives per annum\(^20\). However, it is thought that archives attract a significant proportion of staying and day visitors. One of the key reasons for visiting South East archives is to research family history, which can attract visitors from a variety of local and non-local areas, including overseas.

3.22 The South East has the largest collection of archives of any English region outside London. Further notable features of South East archives include\(^21\):

- 377 archive repositories and collections with 14 local authority record offices;
- 5% of adults in the South East have visited an archive, where 70% of visitors are over 55 years old and 99% are of white British origin;
- 86% of visitors describe their visit to the archive as the main reason for visiting the area, with 9% paying for overnight accommodation, 48% eating out locally and 68% using local shops and services\(^22\);
- 70% of visitors stayed at the archive for over two hours with 43% staying for more than three hours;
- Archives have a number of commercial spin-off contributions. Archives act as research and inspiration portals for writers, designers, artists and filmmakers which lead to book publications and TV programmes;

\(^{20}\) Figures for 2005/06 show 109,519 visits to archives. Source: CIPFA (2006) Local Authority Archive Service Statistics (provided by MLA South East)

\(^{21}\) All facts are from the source: Key Facts – Archives in the South East (2008) MLA South East (unless otherwise stated)

\(^{22}\) IPF Market Research (2006) Public Services Quality Group of the National Council
• There are a number of renowned university repositories in Oxford, Brighton, Canterbury, Reading and Southampton;

• Significant creative and cultural archives such as the South East Film and Video Archive at Brighton, the digital Maritime and Titanic archive in Southampton, the national BBC Written Archive Centre collection and a number of ‘world class’ collections including papers of eight prime ministers and British Christianity archive in Canterbury;

• A further three ‘Designated’ archive collections of national and international importance.

3.23 Of major significance to the archive sector is the growing use of online services. Within the last three years there has been over 425,000 internet searches for archives in the South East. Around 15% of searches on the Access to Archives (A2A) website are for sources held in the South East. Growing application for online search and retrieval of historic and archive documents will encourage the development of technology systems and skilled staffing requirements for archive services. However as the online accessibility of archive materials expands, there is a risk that actual visits may see a decline.

3.24 Archives in the South East are involved with the Archives 4 All Programme, and the Archive Awareness Campaign which helps to make archives more appealing and accessible through activities, projects and events such as open days and workshops to celebrate their holdings.

3.25 The evidence suggests that archives play a relatively minor role in the visitor economy. It is noted that archives service a niche market and that most visits to archives are likely to be based upon a particular interest or academic activity. Of particular interest is a report for MLA North East examining the current activities and opportunities for tourism development that refers to a growing importance of family history research as a driver for international as well as domestic visitors. The report suggests that the niche market for ancestral tourism is significant and driven by the availability of online information about previous generations. There are already profit making initiatives, for example Ancestral Scotland, in which private companies, tourism agencies, archives services and museums

23 MLA North East The Role of Archives within Tourism. A review of current archives tourism activity for tourism development involving archives in North East England (August 2007) Cultural Consulting Networks
collaborate in developing and delivering an ancestral based package for domestic and inbound visitors. The evidence also reveals that, given that much genealogical information is now made available by profit making companies, that the unique additional offer that archives can provide is access and interpretation of other wider forms of personal history, such as workplace, school, hospital, societies and community records.

3.26 Research has indicated that many archives in the South East do not have the resources and facilities to accommodate significant levels of use and therefore do not actively promote their services. Archives are also acknowledged for their support role in the tourism sector, where the use of their materials is invaluable for developing many of the tourism ‘touch points’. For example in Brighton, archive services have played a key role in their Blue Plaque Scheme, which provides public realm heritage information throughout the city.

3.27 Key development priorities for archives in the South East relate to increasing the recognised value of archives for education, culture, social and economic contributions, increasing the access to non local authority archives, developing enhanced strategic marketing – responding to identified needs of all users and continued development of online information and services.

Map of major museums, libraries and archives

3.28 The map in figure 1 shows the location of the major museum, library and archive facilities in the South East region along with the other largest visitor attractions. The map identifies a number of clusters of key museum, library and archive facilities and tourist attractions across the region. These are Oxford, Portsmouth and Brighton, which have a number of the regions largest museums. The major visitor attractions (see table 3 for list) are relatively dispersed throughout the region, with a number along the coastline in Portsmouth, West Sussex, East Sussex and the Isle of Wight.
Map of larger museums, libraries and archives in the South East
Heritage Lottery funding

3.29 Since its inception in 1994 the Heritage Lottery Fund (HLF) has made extensive funding investments in the South East, amounting to £271m. £99m of this has gone to benefit museums, libraries and archives. HLF funding has benefited a wide range of projects in the region, from multi-million pound major facility investments such as the restoration of the Historic Dockyard at Chatham, the award winning Gridshell building at the Weald and Downland Open Air Museum and £7m restoration of the Royal Pavilion in Brighton, to many small community focused projects. The HLF has played an important role in assisting restoration and regeneration of many tourist and community facilities as well as heritage assets which have helped to improve and sustain the wider visitor economy.

Development opportunities

3.30 There are a number of development opportunities for the sector, one of which will be the forthcoming Cultural Olympiad, which will run from Autumn 2008 until the London Olympic and Paralympic Games in 2012. As part of this the UK will deliver a programme of culture and arts. As it stands this is likely to be a period of development for the museum, library and archive sector which will seek to improve visitor facilities and generate a greater economic impact.

3.31 The South East region is planning for a significant period of housing growth, much of which will be channelled through key growth areas in the form of urban expansions and development of regional hubs such as Milton Keynes, Thames Gateway and urban South Hampshire. This presents an opportunity for enhancing museum, library and archive facilities and widening participation through a number of cultural priorities24, which include:

- Developing a rich and varied cultural landscape, in order to deliver a competitive information-led economy;
- Implementation of cultural policies in order to assist regeneration and urban renaissance;
- Improving and enriching the lives of those living in the growth areas;

24 South East England Regional Assembly (2006) Draft South East Plan
• Use of cultural facilities in order to provide lifelong learning and skill development.

**Tourism in South East England**

**Introduction**

3.32 This section of the report sets out the South East region as a visitor destination and considers the potential changes for the future and priorities for tourism development. It will consider how the museum, library and archives sector fits within the wider tourism industry.

**Current volume and value**

3.33 There were 22.4 million staying trips to the South East in 2006. Staying visitors spent 88.7 million nights and £4.1 billion in the South East. In addition there were 194 million day trips to the South East (2002–03), spending £6.12 billion. In context with the rest of the UK, the South East attracts more staying visitors than Scotland or Wales and is the most visited English region after London.

3.34 The average staying trip was 4.0 nights with an average spend per night of £46.31, and average spend per trip of £183.39. Day trips from home have an average spend of £31.55.

3.35 Staying visitors are predominantly from within the UK – 19% of staying visitors to the South East are from overseas, although they contribute 41% of staying visit spend. The highest proportion of overseas visitors to the region come from the USA (12% of overseas visits), Germany (also 12%) and France (11%). Domestic staying visitors are mainly South East residents visiting other areas within their region (35% of domestic staying visits), there are also a significant number of visits from regions adjacent to the South East for example London residents contribute 14% of visits, the South West 13% and East of England 12%. More distant regions such as the North East, Scotland, Wales and Northern Ireland contribute very few visits to the South East.

3.36 50% of staying visitors are thought to base their visit with friends and relatives with the majority of other visitors (26%) using hotel, motel or guesthouse accommodation.
Visitor expenditure helps to generate jobs and supports business vitality. It is thought that 400,000 people are employed in tourism related sectors in the South East with 225,000 FTE jobs supported by visitor spending\(^25\).

**Tourism offer in the South East**

The South East region offers a range of visitor experiences with a mixture of cities, historic towns and villages, a sea bordered countryside with military, naval and royal connections.

The South East region’s core offer can be categorised into three broad groups, these are:

- **Natural Attractions** – the region has a number of areas of natural significance which act as destinations in their own right, serving leisure, activity and recreational visits. The most prominent is the New Forest National Park in Hampshire, a relatively well-known brand. In addition the South Downs, Cotswolds, Isle of Wight, Chilterns, Solent and distinguishable coastline are other important natural environments which service this sector of the visitor economy;

- **Major Resorts and Historic Towns** – which includes Portsmouth, Brighton, Canterbury, Oxford and Winchester;

- **Commercial Attractions** – the South East region is thought to have four ‘iconic’ attractions\(^26\) (see section 1 of the report), which play a role in attracting visits to the area, these are: Legoland Windsor, Windsor Castle, Canterbury Cathedral, Wisley Garden. Table 3 below identifies the top visitor attractions in the South East that provided data to VisitBritain in 2006.

<table>
<thead>
<tr>
<th>Visitor attraction</th>
<th>2006 visits</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Canterbury Cathedral</td>
<td>1,047,380</td>
<td>Canterbury</td>
</tr>
<tr>
<td>2. West Wittering Beach</td>
<td>1,000,000</td>
<td>Chichester</td>
</tr>
<tr>
<td>3. Flamingo Family Fun Park</td>
<td>1,000,000</td>
<td>Hastings</td>
</tr>
<tr>
<td>4. Willen Lake and Park</td>
<td>1,000,000</td>
<td>Milton Keynes</td>
</tr>
<tr>
<td>5. Windsor Castle</td>
<td>986,575</td>
<td>Windsor</td>
</tr>
</tbody>
</table>


\(^{26}\) Iconic attractions taken from the DTZ (2005) *Iconic Tourism Projects in the South West of England* report
<table>
<thead>
<tr>
<th></th>
<th>Name</th>
<th>Visits</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Wisley Garden</td>
<td>683,851</td>
<td>Woking</td>
</tr>
<tr>
<td>7</td>
<td>Spinnaker Tower</td>
<td>530,590</td>
<td>Portsmouth</td>
</tr>
<tr>
<td>8</td>
<td>Marwell Zoological Park</td>
<td>510,955</td>
<td>Winchester</td>
</tr>
<tr>
<td>9</td>
<td>De La Warr Pavilion</td>
<td>500,000</td>
<td>Bexhill on Sea</td>
</tr>
<tr>
<td>10</td>
<td>Portsmouth Historic Dockyard</td>
<td>449,933</td>
<td>Portsmouth</td>
</tr>
<tr>
<td>11</td>
<td>Harbour Park Family Entertainment</td>
<td>440,000</td>
<td>Littlehampton</td>
</tr>
<tr>
<td>12</td>
<td>Wakehurst Place</td>
<td>433,187</td>
<td>Haywards Heath</td>
</tr>
<tr>
<td>13</td>
<td>Leeds Castle</td>
<td>413,655</td>
<td>Maidstone</td>
</tr>
<tr>
<td>14</td>
<td>Blenheim Palace</td>
<td>374,789</td>
<td>Woodstock</td>
</tr>
<tr>
<td>15</td>
<td>Oxford University Museum of Natural History</td>
<td>320,000</td>
<td>Oxford</td>
</tr>
<tr>
<td>16</td>
<td>Ventnor Botanic Garden</td>
<td>277,168</td>
<td>Isle of Wight</td>
</tr>
<tr>
<td>17</td>
<td>Beckhurst Glass, Glass Studio</td>
<td>250,000</td>
<td>Eastbourne</td>
</tr>
<tr>
<td>18</td>
<td>Brighton Museum &amp; Art Gallery</td>
<td>270,077</td>
<td>Brighton</td>
</tr>
<tr>
<td>19</td>
<td>Banbury Museum</td>
<td>236,962</td>
<td>Banbury</td>
</tr>
<tr>
<td>20</td>
<td>Pitt Rivers Museum</td>
<td>190,737</td>
<td>Oxford</td>
</tr>
</tbody>
</table>

Source: VisitBritain (2006) *Visits to Attractions.*

Note: Some of the museum counts are different from the museums visitor counts in table 2 – this is due to different sources and time periods.

**3.40** In addition to these broad categories, the region is well placed to benefit from the large affluent catchment population in London and is a gateway location to England for many sea borne arrivals from Europe. The South East has a number of well known events such as Cowes Week on the Isle of Wight, the Goodwood Festival of Speed, Glyndebourne Opera festival in East Sussex, the Henley festival of music and arts and the Royal Ascot horseracing.

**Visitor characteristics**

**3.41** The South East is a well connected location within the UK, associated and marketed as a ‘gateway’ for overseas visitors accessing the UK and popular as a day trip destination for residents and visitors to London.

**3.42** There are a number of particularly strong destinations such as Oxford, Canterbury, Brighton, and visitors are thought to have strong connotations with relaxing environments such as the New Forest, Cotswolds, Isle of Wight and South Downs. However, this collection of well-known locations can fragment tourism within the region, where visitors are unable to or do not consider linking between core areas. The relatively low profile of the rest of the region (through poor awareness of the tourism offer and lack of strong products outside the key destinations) extenuates fragmentation.
3.43 The Tourism Strategy\textsuperscript{27} identifies a number of perceptions that can be seen as a weakness. The region comes across as an expensive destination thorough the image of economic affluence and wealth within the South East. The South East as a destination suffers from a lack of identity, outsiders and residents don't necessarily perceive it as a tourist destination, with poor visitor awareness of what there is to offer. Despite significant areas of environmental designation in the countryside, the overriding image from outside of the region is one of a commuter belt with congestion and over-development, not helped by poor quality post war development which has eroded local distinctiveness in places.

Forecasts

3.44 The Regional Tourism Strategy\textsuperscript{28} lists a number of external forces which are likely to influence the pattern of tourism and ability for the South East to compete:

- World-wide and UK tourism is expected to continue to grow, however the industry is volatile and susceptible to volatile shocks;
- Political unrest could benefit the South East as a relatively safe haven;
- Increased economic growth in the UK may be channeled into outbound rather than domestic tourism;
- Changing population structure and lifestyles will create new patterns of demand – the market is becoming more fragmented and less loyal;
- People are taking shorter holidays more often and last minute, visitors seek amore flexible experiences tailored to their needs;
- Greater emphasis on quality, service and rewarding experiences.

Tourism priorities

3.45 In the context of the future demand forecasts the Strategy sets out some targets and development priorities, including:

- A 5% increase in visitor spend over the next decade;
- Making a number of changes to improve delivery of tourism which includes – improved presentation to the outside world, improving the

\textsuperscript{27} Tourism South East (2004) Tourism ExSEllence – The Strategy for Tourism in the South East
\textsuperscript{28} ibid
quality and type of experience on offer and changing the way in which tourism is managed.

3.46 Reflecting these priorities the strategy is built around three key aims:

1. **Promoting a 'must visit' region** – raising the level of interest in the region and developing a destination which people aspire to visit. Tourism South East acknowledges that the region is too big and diverse to market as a single destination and is focusing on developing a collection of brands and destinations whilst trying to raise the profile of the lesser known areas.

2. **Providing an unrivalled experience for visitors** – continuous development and improvement of the product on the ground is essential for remaining competitive and meeting changes in demand. Focusing on service quality and facility investment.

3. **Establishing effective management and organisation** – there is a need for more effective partnership working in order to generate better use of resources, maximise impacts on the marketplace and attract wider stakeholder support. Public and private sector co-operation is critical.

### Role of museums, libraries and archives in tourism

3.47 One of the questions in the study brief specifically seeks to assess the role museums, libraries and archives in the wider South East tourism sector. It is clear that museums, libraries and archives have a role as part of the wider tourism offer in South East England and that this varies between museums, libraries and archives.

### Museums

3.48 Museums are included amongst some of the most visited attractions in the region, although none of the museums are within the four iconic attractions in the South East. Much of the role of museums is to service the needs of visitors already intending to spend a staying visit in the South East, and in this sense they add to the overall attractiveness. For day visitors or a limited number of visitors with special interests, museums will be a primary or strong motivation for visiting the region. The review of the wider South East visitor economy suggests that the South East is not perceived as a single visitor destination, but more a collection of separate
destinations. The mix and spread of different sized museums across the region helps to contribute to the tourism offer in the less well known/visited areas and helps to disperse tourism visits to areas that visitors may not otherwise visit. This will include high profile museums which attract visitors to a number of cities and towns which are not considered to be primary tourism destinations in the South East, such as the Historic Dockyards at Portsmouth in Hampshire and Chatham in Kent. Therefore museums have a significant role in the South East’s visitor economy.

Libraries

3.49 The study has shown how a number of new library models such as Discovery Centres are attracting a wider visitor profile. The main remit for this is to increase the level of inclusion from the wider community and achieve a wider visitor profile. An external effect of this has been a limited number of tourist visitors who are likely to make use of café, gallery or exhibition facilities. New build and refurbished library facilities have contributed to an improved public realm which is thought to increase the appeal and vitality of a destination. In addition a limited number of libraries provide tourist information for visitors. However outside these new library models there is little evidence of tourism use of libraries and as a whole, libraries do not have a significant role within the region’s tourism product.

Archives

3.50 Archives in the South East attract a number of tourist visitors, especially through academic or particular interests such as researching family history. The archive sector lacks a strong presence for visitors and receives significantly fewer visits compared to museums. It is acknowledged that the South East has a number of important archive collections, and that they have a role to play in contributing culture and heritage information to the tourism products. Within a limited scope, archives have a significant role within the region’s tourism product.

3.51 Museums, libraries and archives have a role to play in delivering the regional tourism objectives. The Tourism Strategy\(^2\)\(^9\) seeks to use tourism and culture as a component for regeneration. A number of museum, library and archive facilities have played a part in regeneration projects such as the Jubilee Library in Brighton and the Lightbox in Woking,

\(^2\)\(^9\) Tourism South East (2004) \textit{Tourism ExSEllence – The Strategy for Tourism in the South East}
with a number of other refurbishment projects in progress such as the Ashmolean Museum of Art and Archaeology in Oxford and the Royal Museum/Beaney Institute in Canterbury.

**Summary**

3.52 This short summary section seeks to review the role of the museums, libraries and archives in the overall visitor economy and make a judgment on the extent to which they form part of the product attracting UK and overseas visitors to the region.

3.53 It is recognised that the museums, libraries and archives play a valuable role in both serving the needs of local residents as a community based centre for culture, education, history and heritage and as visitor attractions that promote the area through their collections and generate revenue through visits as an attraction. Museums are particularly noted for their dual function.

3.54 There are a number of major museum attractions in the South East, a small number of these are among the largest attractions in the region and many other large and medium sized museums form part of the second tier of attractions. Many of the larger, more prominent museums will motivate day visits from staying visitors and residents in the South East and further afield. To this extent the museums are thought to be part of the core tourism product of things to ‘see and do’ thus aiding and extenuating visitors’ enjoyment during their stay.

3.55 Empirical evidence suggests that libraries do not have a significant role in the region’s visitor economy. Libraries tend to focus their primary activity on the needs of local residents. However, a small number of large scale projects in the South East such as the Discovery Centres in Hampshire and the Jubilee Library in Brighton have illustrated through redevelopment of library buildings and services that it is possible to widen and increase their audience base, which includes visitors to the area. It is noted that these projects are few in number and are only likely to impact upon tourist visitors where the project is in a town centre location and/or part of a wider regeneration initiative.
3.56 Due to their low volume of use compared with museums and libraries, archive facilities play a limited but significant role in serving visitors. It is interesting to note that many visits to archives are by day and staying visitors (as opposed to local users) and that use of an archive facility will normally be the primary motive for visiting the area (87% of visits). As reported by MLA North East, archives are receiving growing visitor attention through ‘roots’, genealogical and ancestral tourism, where there are opportunities to develop promotions and marketing for this niche market. In addition, archives are well placed to provide access to and interpretation of other wider forms of personal history, such as workplace, school, hospital, societies and community records.

3.57 Evidence suggests that in many cases archive facilities are not geared towards visitor use (i.e. poor accessibility and lack of active promotion); however these are issues that MLA South East has been seeking to address through its Archive Development Strategy.

30 Public Services Quality Group of the National Council on Archives (2006) Survey of Visitors to UK Archives
4 Economic impact of museums

4.1 This section of the report pulls together the research material that has been collected on museums and museum visitor profiles and applies it to a framework for visitor expenditure and employment generation for tourist visits to the South East.

Museums and their visitors

Numbers

4.2 There are some 265 Registered/Accredited museums in the South East, 235 of which collected and returned annual visitor counts for 2006–07 to MLA South East via the South East Schools Database Project. The economic impact analysis is based upon visitor count information from the 235 museums providing a return. This represents the majority of museums in the South East region, with a total visitor count of 8,159,597.

Visitor profile

4.3 The profile of visitors to museums in the South East was estimated using the sample of museum estimates and visitors surveys discussed in the methodology section. This sample was able to provide an indication of the different visitor profiles for different sized museums.

Tourism significance

4.4 The tourism expenditure attributed to a museum visit will vary according to the type of visitor (staying, day or local). Three different bands of 'tourism significance' were outlined based upon visitor count data. These bands were subsequently adjusted to make best use of the available visitor profile information. The outcome of this exercise was three bands of museum tourism 'significance':
  - Top band of 80,000 plus annual visits;
  - Middle band representing 20,000 to 80,000 visits;
  - Lower band of sub 20,000 visits.

4.5 Further details are given in the methodology section in section 1. The following table shows a summary of the visitor profiles applied to museum visits.
4.6 It can be seen that most of the visits to the larger museums are by non-local day visitors or by staying visitors. By contrast, locals make up the majority of visitors at the smaller museums.

4.7 It should be noted that the visitor profile for the low band (sub 20k visits) is considered to be the least robust, based upon surveys from two museums. Thus it would prudent to update the visitor profiles when robust survey information is available. Through this process it would also be possible to readjust the museum bandings if needed, or add new bands in light of more detailed information.

Visitor spend

4.8 Economic and employment benefits are derived from daily spend per head figures for South East tourist visits. The methodology and source for these is given in section 1. The basic staying visitor spend is £46.31 per day and £31.55 for day visitors.

4.9 Museum entry fees, where applicable, are a direct contribution towards employment in museums. Direct employment in museums has already been calculated from MLA South East’s workforce mapping study. To avoid double counting RTP have made an adjustment to the daily visitor spend to take account of the average entry fee to museums in the South East.

4.10 The average entry fee was calculated using Visit Britain’s 2006 Visits to Visitor Attractions data on 92 museums and art galleries in the South East region. A weighted average based on the entry fees paid and number of visits gives an average entry fee of £3.60 (this figure takes account of the many free museums). Therefore, the following off-site daily

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**Table 4: Visitor profiles – breakdown for staying, day and local visits**

<table>
<thead>
<tr>
<th>Museum attraction study bands</th>
<th>Staying visits</th>
<th>Day visits</th>
<th>Local visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>80k + Visits</td>
<td>47%</td>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>20k–80k Visits</td>
<td>41%</td>
<td>48%</td>
<td>11%</td>
</tr>
<tr>
<td>0k–20k Visits</td>
<td>0%</td>
<td>40%</td>
<td>60%</td>
</tr>
</tbody>
</table>

*Source: Selection of South East Museums’ Visitor Surveys*

---

spend has been applied to the economic impact assessment of museums:
- Staying visitor average spend per day = £42.71;
- Day visitor average spend per day = £27.95.

Employment supported by day and staying visitors

4.11 We have used a review of South East local authority tourism economic impact models to estimate the average amount of visitor expenditure needed to support a full time equivalent (FTE) job. These jobs will occur directly in the businesses serving visitors (accommodation, catering, retail, entertainment, transport) as well as a wider variety of businesses through the indirect and induced impacts.

Table 5: Visitor expenditure per FTE job in South East England

<table>
<thead>
<tr>
<th></th>
<th>Staying visitors</th>
<th>Day visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitor expenditure required for one direct FTE</td>
<td>£57,420</td>
<td>£102,676</td>
</tr>
<tr>
<td>Visitor expenditure required for one indirect/induced FTE</td>
<td>£140,227</td>
<td>£220,441</td>
</tr>
</tbody>
</table>

Economic impact of museums

4.12 The variables and data described above are combined to calculate the contribution of museums to the South East visitor economy.

4.13 Overall it is estimated that museums in the South East support 3,224 FTE jobs in the visitor economy through associated off-site expenditure. Another 1,369 jobs are supported through induced and indirect effects and there are 4,090 people directly employed in the museums. The total of 8,683 jobs is equivalent to 33 jobs per museum (including supported and indirect jobs) with an average of 15 of jobs employed within each museum facility.

4.14 Over half of the jobs supported through off-site visitor expenditure are linked to the larger museums.

4.15 The table overleaf summarises the visitor expenditure and employment supported.
### Table 6: Volume and value of tourism impact by SE museums

<table>
<thead>
<tr>
<th>Museum attraction study bands</th>
<th>80k+ visits</th>
<th>20k–80k visits</th>
<th>0k–20k visits</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of museums</td>
<td>27</td>
<td>65</td>
<td>143</td>
<td>235</td>
</tr>
<tr>
<td>Staying visits</td>
<td>2,001,048</td>
<td>1,179,424</td>
<td>0</td>
<td>3,180,471</td>
</tr>
<tr>
<td>Staying visitor spend</td>
<td>£85,464,741</td>
<td>£50,373,195</td>
<td>£0</td>
<td>£135,837,936</td>
</tr>
<tr>
<td>Staying visits – Direct Employment (FTEs)</td>
<td>1,488</td>
<td>877</td>
<td>0</td>
<td>2,366</td>
</tr>
<tr>
<td>Staying visits – indirect employment (FTEs)</td>
<td>609</td>
<td>359</td>
<td>0</td>
<td>969</td>
</tr>
<tr>
<td>Day visits</td>
<td>1,362,415</td>
<td>1,380,789</td>
<td>410,162</td>
<td>3,153,366</td>
</tr>
<tr>
<td>Day visitor spend</td>
<td>£38,079,509</td>
<td>£38,593,051</td>
<td>£11,464,028</td>
<td>£88,136,589</td>
</tr>
<tr>
<td>Day visit – direct employment (FTEs)</td>
<td>371</td>
<td>376</td>
<td>112</td>
<td>858</td>
</tr>
<tr>
<td>Day visit – indirect employment (FTEs)</td>
<td>173</td>
<td>175</td>
<td>52</td>
<td>400</td>
</tr>
<tr>
<td>Local visits – no economic impact</td>
<td>894,085</td>
<td>316,431</td>
<td>615,243</td>
<td>1,825,759</td>
</tr>
<tr>
<td>Total spend</td>
<td>£123,544,251</td>
<td>£88,966,246</td>
<td>£11,464,028</td>
<td>£223,974,525</td>
</tr>
<tr>
<td>Total direct employment (FTEs) supported by spend</td>
<td>1,859</td>
<td>1,253</td>
<td>112</td>
<td>3,224</td>
</tr>
<tr>
<td>Total indirect/induced employment (FTEs) supported by spend</td>
<td>782</td>
<td>534</td>
<td>52</td>
<td>1,369</td>
</tr>
<tr>
<td>Total direct and indirect employment supported by visitor spend</td>
<td>2,641</td>
<td>1,787</td>
<td>164</td>
<td>4,592</td>
</tr>
<tr>
<td>Direct employment in museums</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>4,090</td>
</tr>
<tr>
<td>Total direct employment and direct and indirect employment supported by visitor spend</td>
<td>8,683</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5 Economic impact of libraries

5.1 This section of the report considers the visitor spend and employment supported by libraries in South East England.

Libraries and their visitors

5.2 The following table shows the library visitor counts by local authority area in the South East.

Table 7: Visits to libraries in the South East

<table>
<thead>
<tr>
<th>LA area</th>
<th>2006–07 visit count</th>
<th>Library with most visits</th>
<th>Visit count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bracknell Forest</td>
<td>521,784</td>
<td>Bracknell</td>
<td>163,253</td>
</tr>
<tr>
<td>Brighton &amp; Hove</td>
<td>1,762,450</td>
<td>Jubilee</td>
<td>896,822</td>
</tr>
<tr>
<td>Buckinghamshire</td>
<td>2,928,613</td>
<td>Aylesbury</td>
<td>401,153</td>
</tr>
<tr>
<td>East Sussex</td>
<td>2,627,753</td>
<td>Eastbourne</td>
<td>415,187</td>
</tr>
<tr>
<td>Hampshire</td>
<td>6,890,576</td>
<td>Basingstoke</td>
<td>504,472</td>
</tr>
<tr>
<td>Isle of Wight</td>
<td>839,188</td>
<td>Lord Louis Library, Newport</td>
<td>221,700</td>
</tr>
<tr>
<td>Kent</td>
<td>7,075,129</td>
<td>Ashford</td>
<td>447,896</td>
</tr>
<tr>
<td>Medway</td>
<td>1,059,565</td>
<td>Chatham</td>
<td>179,746</td>
</tr>
<tr>
<td>Milton Keynes</td>
<td>1,135,680</td>
<td>Milton Keynes Central</td>
<td>636,532</td>
</tr>
<tr>
<td>Oxfordshire</td>
<td>4,168,807</td>
<td>Oxford Central</td>
<td>648,283</td>
</tr>
<tr>
<td>Portsmouth</td>
<td>1,040,526</td>
<td>Portsmouth Central</td>
<td>352,200</td>
</tr>
<tr>
<td>Reading</td>
<td>759,241</td>
<td>Reading</td>
<td>423,527</td>
</tr>
<tr>
<td>Slough</td>
<td>617,270</td>
<td>Slough</td>
<td>428,088</td>
</tr>
<tr>
<td>Southampton</td>
<td>1,479,923</td>
<td>Southampton Central</td>
<td>400,228</td>
</tr>
<tr>
<td>Surrey</td>
<td>6,207,292</td>
<td>Woking</td>
<td>692,796</td>
</tr>
<tr>
<td>West Berkshire</td>
<td>584,738</td>
<td>Newbury</td>
<td>321,978</td>
</tr>
<tr>
<td>West Sussex</td>
<td>4,532,880</td>
<td>Horsham</td>
<td>538,317</td>
</tr>
<tr>
<td>Windsor &amp; Maidenhead</td>
<td>742,124</td>
<td>Maidenhead</td>
<td>262,278</td>
</tr>
<tr>
<td>Wokingham</td>
<td>522,912</td>
<td>Wokingham</td>
<td>176,377</td>
</tr>
<tr>
<td>Total for South East</td>
<td>45,496,451</td>
<td></td>
<td>8,110,833</td>
</tr>
</tbody>
</table>

Source: CIPFA 2006–07 Actuals
5.3 The Public Library User Survey (PLUS) is carried out by all library authorities in the country. The survey collects information about the satisfaction and quality of library services and some basic demographic information about library uses such as age, ethnicity and employment status. Although PLUS surveys from the Jubilee Library and Southampton Central were reviewed it was not possible to obtain information on the profile of library users.

5.4 However, evidence from elsewhere in the UK (discussed in the methodology section) indicates that 100% of library users in three libraries in the East Midlands are local residents.

5.5 Based on this empirical observation and in absence of robust user profiles it is considered that with the exception of Bodleian Library in Oxford and for the purposes of this exercise the local and regional libraries in the South East provide almost exclusively for resident users and do not service tourist visits.

Bodleian Library economic impact

5.6 In effect the Bodleian Library operates in the same way as one of the larger museums and so we have used the same process as the earlier section discussing the economic impact of museums.

Tourism significance

5.7 As the visitor profile for the Bodleian Library has not been made available for this study, the appropriate museums profile has been adopted to calculate the number of staying and day visitors. Based on the 2006 library visitor count of 131,701 visits, the upper band (80,000+ visits per annum) for the museum visitor profile is applied (see table 2), which suggests 47% of the visitors were staying, 32% were day visitors and 21% were local visitors.

Visitor spend

5.8 The average daily spend figures for tourist visits to the South East are also applied to visits to the Bodleian Library. It is possible to adjust these figures down using the actual entry fee to the Bodleian to avoid double counting the employment impacts for the library staff (as detailed in the methodology, section 1).

---

33 VisitBritain (2006) Visits to Visitor Attractions
5.9 The standard entry fee to the Bodleian is £2, although guided tours are charged at a higher rate. It is not known what the split in entry types is and therefore this analysis is based on the standard entry charge of £2. Children under 14 are admitted free, however, a review of the Bodleian’s visitor website suggests that as an attraction, it is not particularly suitable for child visits. Therefore, it is assumed that all visits are from paying adults. Based on the approach taken for museums, the daily spend per head attributed to visits to the Bodleian is:
- £44.31 for staying visitors;
- £29.55 for day visitors.

**Employment supported by day and staying visitors**

5.10 The same visitor spend per employment used in section 3 (museums) have been applied to Bodleian visitor spend. The values were derived from a review of South East local authority tourism economic impact reports and can be seen in table 3.

**Economic impact**

5.11 Using the visitor data, tourism expenditure and visitor spend per job detailed above the following economic impact assessment can be estimated. Note that this does not include direct employment in the library.

<table>
<thead>
<tr>
<th>Table 8: Volume and value of visits to the Bodleian Library</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Staying visitors</strong></td>
</tr>
<tr>
<td>Number of visits</td>
</tr>
<tr>
<td>Spend</td>
</tr>
<tr>
<td>Direct employment (FTEs) supported by visitor spend</td>
</tr>
<tr>
<td>Indirect/induced employment (FTEs) supported by visitor spend</td>
</tr>
<tr>
<td>Total direct and indirect employment (FTEs) supported by visitor spend</td>
</tr>
</tbody>
</table>

5.12 It is estimated that the off-site visitor spend directly supports 60 jobs. Another 26 jobs are supported through induced and indirect effects, bringing estimate of the total employment supported through offsite visitor expenditure to 86.
6 Economic impact of archives

6.1 This section of the report considers the visitor spend and employment supported by archives in South East England.

Archives and their visitors

6.2 The following table shows the number of visits to archives by local authority area in the South East.

<table>
<thead>
<tr>
<th>Local Authority archive office</th>
<th>2006 visitor count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Berkshire</td>
<td>6,922</td>
</tr>
<tr>
<td>Buckinghamshire</td>
<td>25,186</td>
</tr>
<tr>
<td>East Sussex</td>
<td>5,368</td>
</tr>
<tr>
<td>Hampshire</td>
<td>16,900</td>
</tr>
<tr>
<td>Kent</td>
<td>13,671</td>
</tr>
<tr>
<td>Oxfordshire</td>
<td>5,954</td>
</tr>
<tr>
<td>Surrey</td>
<td>7,862</td>
</tr>
<tr>
<td>West Sussex</td>
<td>10,609</td>
</tr>
<tr>
<td>Isle of Wight</td>
<td>3,667</td>
</tr>
<tr>
<td>Medway</td>
<td>7,000</td>
</tr>
<tr>
<td>Portsmouth</td>
<td>3,841</td>
</tr>
<tr>
<td>Southampton</td>
<td>2,539</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>109,519</strong></td>
</tr>
</tbody>
</table>

Source: CIPFA totals March 2006. Note: These offices cover all LA archives in the SE area. Some UA offices are amalgamated with their traditional County area.

6.3 A visitor profile for archive users has been obtained from the 2006 Survey of Visitors to UK Archives conducted by the Public Services Quality Group of the National Council on Archives. The survey covers 14 archives in the South East region with a sample of around 1,300 users.

6.4 Questions 6 and 14 of the survey were able to help build the visitor profile which outlined that 8.7% of users pay for overnight accommodation, 50% of users live within 18 miles and 50% living further than this distance.
6.5 The 50% of users who are non-local are then split into staying and day visitors based on the proportion that pays for overnight accommodation (8.7%).

Table 10: Visitor profile for SE archives

<table>
<thead>
<tr>
<th>SE archive visits</th>
<th>Staying visits</th>
<th>Day visits</th>
<th>Local visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>109,519</td>
<td>8.7%</td>
<td>45.6%</td>
<td>45.6%</td>
</tr>
</tbody>
</table>

Visitor spend

6.6 The full visitor day spend figure is applied to the archive assessment as it is understood that most archives are free to access (although there will be charges for consumables such as copying etc.). Therefore the daily spend per head attributed to visits to South East archives is:
- £46.31 for staying visitors;
- £31.55 for day visitors.

Employment supported by day and staying visitors

6.7 The same visitor spend per employment used in section 3 (museums) have been applied to archive visitor expenditure. The values were derived from a review of South East local authority tourism economic impact reports and can be seen in table 3.

Economic impact of archives

6.8 Using the visitor data, tourism expenditure and visitor spend per job detailed above the following economic impact assessment can be derived for the archive sector:

---

34 It is noted that the 8.7% of visitors paying for overnight accommodation will not account for those staying with friends and relatives but in the absence of further information the figure has not been adjusted.
<table>
<thead>
<tr>
<th></th>
<th>Staying visitors</th>
<th>Day visitors</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of visits</td>
<td>9,528</td>
<td>49,995</td>
<td>59,524</td>
</tr>
<tr>
<td>Spend</td>
<td>£441,249</td>
<td>£1,577,356</td>
<td>£2,018,604</td>
</tr>
<tr>
<td>Direct employment supported by visitor spend</td>
<td>8</td>
<td>15</td>
<td>23</td>
</tr>
<tr>
<td>Indirect/induced employment</td>
<td>3</td>
<td>7</td>
<td>10</td>
</tr>
<tr>
<td>Total direct and indirect employment supported by visitor spend</td>
<td>n/a</td>
<td>n/a</td>
<td>651</td>
</tr>
<tr>
<td>Total direct employment and direct and indirect employment supported by visitor spend</td>
<td>n/a</td>
<td>n/a</td>
<td>684</td>
</tr>
</tbody>
</table>

6.9 It is estimated that the off-site visitor spend directly supports 23 jobs. Another 10 jobs are supported through induced and indirect effects, bringing estimate of the total employment supported through offsite visitor expenditure to 33.
7 Summary economic impact of museums, libraries and archive sector

7.1 The table below brings together the economic impact assessments for each of the museum, library and archive sectors presented in the preceding chapters.

Table 12: Summary of museum, library and archive economic impacts

<table>
<thead>
<tr>
<th>Facility</th>
<th>Museums</th>
<th>Libraries¹</th>
<th>Archives</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total visitors/users²</td>
<td>8,159,597</td>
<td>45,496,451</td>
<td>109,519</td>
<td>53,765,567</td>
</tr>
<tr>
<td>Estimated staying visitors</td>
<td>3,180,471</td>
<td>61,899</td>
<td>9,528</td>
<td>3,251,898</td>
</tr>
<tr>
<td>Estimated nonlocal day visitors</td>
<td>3,153,366</td>
<td>42,144</td>
<td>49,995</td>
<td>3,245,505</td>
</tr>
<tr>
<td>Staying visitor spend</td>
<td>£135,837,936</td>
<td>£2,742,766</td>
<td>£441,249</td>
<td>£139,021,951</td>
</tr>
<tr>
<td>Day visitors spend</td>
<td>£88,136,589</td>
<td>£1,245,365</td>
<td>£1,577,356</td>
<td>£90,959,309</td>
</tr>
<tr>
<td>Total spend</td>
<td>£223,974,525</td>
<td>£3,988,301</td>
<td>£2,088,604</td>
<td>£229,981,260</td>
</tr>
<tr>
<td>Direct employment³</td>
<td>4,090</td>
<td>10,504</td>
<td>651</td>
<td>15,245</td>
</tr>
<tr>
<td>Employment directly supported by visitor spend</td>
<td>3,224</td>
<td>60</td>
<td>23</td>
<td>3,307</td>
</tr>
<tr>
<td>Indirect &amp; induced employment</td>
<td>1,369</td>
<td>25</td>
<td>10</td>
<td>1,404</td>
</tr>
<tr>
<td>Total employment</td>
<td>8,683</td>
<td>10,589</td>
<td>684</td>
<td>19,956</td>
</tr>
</tbody>
</table>

¹ Economic Impact of libraries is restricted to the Bodleian Library in Oxford, although some other libraries may have a tourism role (Jubilee, Brighton and Discovery Centres in Hampshire) the visitor profile is not known. All other libraries are not considered to have a tourist role except as providers of information and temporary membership.

² Includes local users as well as staying and day visitors.


7.2 Overall museums libraries and archives in the South East are estimated to support 15,245 jobs in direct employment within the facilities concerned, 3,307 through other businesses in receipt of visitor expenditure and 1,404 through indirect and induced effects. The total direct and indirect employment supported is 19,956 jobs.

7.3 Museums make up almost two thirds of the overall employment impacts although between them libraries and archives account for more direct employment.
8 Key findings and conclusion

Role of museums, libraries and archives on the visitor economy

8.1 The study has identified that museums are part of the core tourism product for a visitor destination. Libraries and archives have a limited role to play at present but there are opportunities for developing their roles further. In this respect, it is recognised that new library facilities (Discovery Centres in Hampshire and the Jubilee Library in Brighton) have successfully widened their user profiles, including tourist visitors who are likely to make use of galleries, exhibitions and cafes. It is acknowledged that a significant proportion of visits to archives are tourist visitors, however overall visitor numbers are low.

8.2 The tourism significance of museums is highly variable within the South East, with a selection of around thirty large museum attractions and many small and medium sized facilities. The larger museums sit in the second tier of ‘top attractions' in the South East (i.e. those in the 80k+ visit category). These museums are thought to be major attractions and play an important role through servicing tourist visits to an area. They provide enjoyment and learning opportunities for visitors, contributing to the mix of attractions that makes a successful visitor destination.

8.3 While the role and value of museums is readily advocated, it is felt that they primarily serve visitors during their stay in the South East and do not form part of the motive for visiting the region. Despite this, larger museums will motivate day trips to a destination. Other studies have suggested that only iconic attractions will directly motivate visits, however there are only ever a limited number of these in any one region and they tend not to comprise museum attractions.

8.4 A number of museum, library and archive facilities have been redeveloped or refurbished either on their own or as part of wider regeneration schemes. Such projects have sought to improve the entertainment, cultural and heritage assets for residents and visitors, thus serving to develop the tourism product and seeking to safeguard and enhance economic vitality.
Economic impact of museums, libraries and archives

Visitor spending

8.5 Visitors to museums, libraries and archives spend £229,981,260 in the regional economy. The vast majority of this expenditure is attributed to museum visits (£223,974,525 or 97%). Libraries and archives are thought to contribute £6m in visitor expenditure although the study has found that there are opportunities for greater involvement of these facilities.

8.6 Staying visits to museums, libraries and archives generate £130m and 60% of the total visitor expenditure. In the context of the overall South East visitor economy, museum, library and archive visits contribute around 2.25% of annual regional visitor spend.

Employment impacts

8.7 The total employment attributed to the sector is 19,956 jobs (not including volunteers), with 15,245 being direct employees of museum, library and archive facilities. Direct employment is greatest in libraries (10,504 jobs), however due to the dominant visitor spend associated with museum visits, the majority of directly supported jobs and induced employment benefits are generated through museum visits rather than through visits to libraries or archives (3,224 and 1,369 FTEs respectively).

Research opportunities and recommendations

Data collection and surveys

8.8 Should MLA wish to update the economic impact assessment at a later date the following recommendations make a few suggestions regarding data collection and visitor profiling.

8.9 As noted in the methodology (section 2), many of the visitor surveys used to develop the visitor profiles in this study do not specifically ask about the profile of their visitors. Where MLA may have influence over future survey exercises (for example the Renaissance Hub Exit Survey which they have previously commissioned) it would be worthwhile including questions which seek to identify the visitors as:

- Local users;
• Day visitors – People on irregular non-local trip day trips of over three hours in duration; and

• Staying visitors – People staying overnight on vacation, business, visiting friends and relatives or other purposes.

8.10 This would help to enhance the evidence base on the proportion of day, staying and local visitors.

8.11 Additionally if further resources are available it would be beneficial to undertake some primary research to confirm the findings based on the initial visitor profile data collected as part of this study.
Appendix 1: Bibliography

Cultural Consulting Networks (2007) The Role of Archives within Tourism, MLA North East


DTZ (2005) Iconic Tourism Projects in the South West of England, SWRDA

IPF Market Research (2006) Public Services Quality Group of the National Council on Archives


MLA South East/Social Informatics Research Unit of the University of Brighton (2005) The Museums, Libraries and Archives Workforce in the South East of England

MLA South East (2008) Key Facts – Museums in the South East


MLA South East (2008) Key Facts – Archives in the South East


Public Services Quality Group of the National Council on Archives (2006) Survey of Visitors to UK Archives


VisitBritain (2006) Visits to Visitor Attractions
### Appendix 2: List of study consultees

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karen Roebuck</td>
<td>Head Marketing Services</td>
<td>Tourism South East</td>
</tr>
<tr>
<td>Adam Bates</td>
<td>Head of Tourism</td>
<td>Brighton &amp; Hove City Council</td>
</tr>
<tr>
<td>Caroline Dudley</td>
<td>Head of Museums and Archives</td>
<td>Hampshire County Council</td>
</tr>
<tr>
<td>Andrew Bateman</td>
<td>Tourism Manager</td>
<td>Hampshire County Council</td>
</tr>
<tr>
<td>Helen Wheeler</td>
<td>Policy Manager</td>
<td>Hampshire County Council</td>
</tr>
<tr>
<td>John Parry</td>
<td>Research Manager</td>
<td>Hampshire County Council</td>
</tr>
<tr>
<td>Neil McCullom</td>
<td>Tourism Manager</td>
<td>Canterbury City Council</td>
</tr>
<tr>
<td>Louise Rodwell</td>
<td>Tourism Officer</td>
<td>Portsmouth City Council</td>
</tr>
<tr>
<td>David Wood</td>
<td>Tourism Manager</td>
<td>Southampton City Council</td>
</tr>
<tr>
<td>Heather Armitage</td>
<td>Tourist Information Officer</td>
<td>Oxford City Council</td>
</tr>
<tr>
<td>Ashley Curzon</td>
<td>Acting Head of Regeneration</td>
<td>Isle of Wight Council</td>
</tr>
<tr>
<td>Helen Ryan</td>
<td>Economic Development Officer</td>
<td>Oxfordshire County Council</td>
</tr>
</tbody>
</table>
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(Operational until 31 December 2008; all enquiries after that date should be made to MLA www.mla.gov.uk)

July 2008 (reprinted September 2008)

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