



Association of Leading  
Visitor Attractions

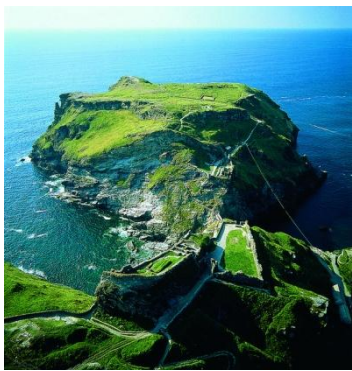
# Bernard Donoghue

## Director

**Museums and Galleries:** British Library / British Museum / Glasgow Museums / Imperial War Museums / Library of Birmingham / National Galleries of Scotland / National Gallery / National Museum of the Royal Navy / National Museums Liverpool / National Museums Scotland / National Portrait Gallery / Natural History Museum / Oxford University Museums / Royal Academy / Royal Museums Greenwich / Science Museum Group / Tate Modern, Tate Britain, Tate Liverpool, Tate St Ives / Victoria and Albert Museum

**Heritage & Cathedrals:** Canal and River Trust / Canterbury Cathedral / The Churches Conservation Trust / English Heritage / Historic Royal Palaces / Historic Scotland / Houses of Parliament / National Trust / National Trust for Scotland / The Old Royal Naval College Greenwich / Portsmouth Historic Dockyard / St Paul's Cathedral / The Roman Baths and Pump Room, Bath / Treasure Houses of England / Westminster Abbey

**Gardens & Leisure:** Eden Project / Continuum Group / The North of England Zoological Society / Pleasure Beach / The Royal Botanic Garden, Edinburgh / The Royal Botanic Gardens, Kew / The Royal Horticultural Society / Warner Bros. Studio Tour London 'The Making of Harry Potter' / The Zoological Society of London





- Tourism is the UK's sixth largest industry, employing 1 in 11 of all people working in the UK and generating £115bn every year for the UK economy
- Rt Hon Hugh Robertson MP,  
Minister for Sport and Tourism.



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- 15 ministers in 9 years
- Average tenure is 18 months
- RDA, LEP, Casino, Planning regulations, bed tax
- Structural changes to VE



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- **A new Full Time Equivalent tourism job** is created and sustained with every £50,000 increase in tourism revenue
- The UK tourism industry employs **2.66m people**
- The sector is the **UK's third largest employer**, accounting for 9% of total employment
- There are **249,000 tourism businesses in the UK** (10% of the total number of businesses)
- **Over 80% of tourism and hospitality industry businesses employ fewer than 10 people.**
  - Supply Side of Tourism Report, Office for National Statistics, 2012



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- The sector is a significant incubator for entrepreneurs – despite the economic downturn there were **21,580 businesses start-up in the sector in 2009.**
- The sector is a significant source of employment for those unable to work full-time – **nearly half the sector's workforce is part time.**
- The sector is a large employer of school leavers and young people – **44% percent of people employed in the sector are under the age of 30** compared to the national average of 24%.
- **Turnover rates in the sector have declined significantly to 23%.**
- **80% of people working in the sector are British.**
  - State of the Nation Report, People 1st, 2011

- Air Passenger Duty **£2.2bn**
- VAT (estimate) **£18.3bn**
- World Economic Forum's 2011 study on international competitiveness shows that the **UK now ranks 135<sup>th</sup> out of 139 countries in terms of taxation on tourists.**
  - The Travel and Tourism Competitiveness Report, WEF, 2011

- Growing Tourism
  - Building blocks
    - Skills, quality, investment, infrastructure, political will – vocabulary and media engagement
  - Enablers
    - VAT, APD, visas, RDF, planning, fuel prices
  - Drivers
    - Research, marketing, experience



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