Taking Charge – Evaluating the Evidence:

The Impact of Charging or Not for Admissions on Museums

Final Report
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KEY FINDINGS

- There are no defining characteristics that distinguish charging or free-entry museums, and the picture is much more complex than often assumed, since one in three independent museums are free-entry and one in three local authority museums charge for admission.

- There is no direct link between the diversity of audiences and whether a museum charges for admission or not, with the pattern in terms of social mix being very similar. However, such a finding needs to acknowledge that the general social mix of museum visitors is not always representative of the wider social mix within their communities.

- Donations are more affected by a range of other factors than by whether museums charge for admission or not.

- There is no consistent relationship between levels of secondary spend and whether a museum charges admission, with other factors having much more influence. However, some evidence has emerged showing visitors to charging museums are more likely to have visited the shop (or used on-site catering), than visitors to free-entry museums.

- Dwell times are typically longer for museums that charge for admissions.

- The process of charging creates a focus for the visitor welcome and captures information about visitors. Where museums are free entry, alternative approaches are required for these elements.

- In making any changes it is especially important to communicate clearly with stakeholders and the local community about the reasons for the changes and to ensure that staff are positive and confident in explaining them to visitors.

Acknowledgements: DC Research and the Steering Group representatives for this project (Association of Independent Museums; Arts Council England; and Museums, Archives and Libraries Division of Welsh Government) would like to thank all those museums and individuals that contributed to this research in various ways – including replying to the survey, agreeing to be visited as a case study museum, being consulted by the study team, providing examples of previous research and evidence around charging for admissions, and/or through commenting on emerging findings from the research at various points. In addition, we would like to thank those organisations that helped in various ways to promote the survey of museums that took place as part of the research. All of these contributions and the time given is very much appreciated.

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Please note, this report is part of a suite of publications produced as part of this research study. Alongside this Final Report, there is also a **Success Guide**, an **Executive Summary**, and a **Summary Report for Wales**. All of these publications are available on the AIM website: **www.aim-museums.co.uk**.

1. INTRODUCTION

1.1 The Association of Independent Museums (AIM), in partnership with Arts Council England (ACE) and the Museums Archives and Libraries Division (MALD) of the Welsh Government, commissioned DC Research Ltd to carry out a research study into the impact of charging for admissions on museums.

1.2 The research study was commissioned in February 2016 and the research took place during Spring and Summer 2016. This Final Report was produced in August 2016.

Aims of Research

1.3 The overall aim of the research was to understand the experience of museums that have moved from free admission to charging, or charging to free admission, or to 'hybrid' models, and to investigate different pricing strategies and their impact; including:

i. impact on visitor numbers

ii. impact on diversity of visitors

iii. overall impact on income including the affect on secondary spend and spontaneous donation

iv. impact on visitor satisfaction / quality of visit

v. impact on reputation and relationships with stakeholders, community, members etc.

vi. lessons learnt to share with other museums

Approach and Method

1.4 In summary, the approach and method for the research included a detailed review of previous research and literature about the impact of charging for admissions to museums, carrying out a sector-wide survey of museums across the UK (a total of 311 useable replies were received), visiting 20 case study museums to assess in depth the impact of charging for admissions, and carrying out a range of one-to-one consultations with key museum stakeholders.

1.5 The **review of previous research and literature** about the impact of charging or not for admissions to museums sought to identify and review relevant research and literature from the UK and internationally[1]. A list of the references and bibliography is included in Annex 3 to this report.

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[1] Specific reference to relevant previous research and literature is included in footnotes within the most appropriate sections of this report. It should be noted that a substantial proportion of the research literature (especially in the UK) about the impact of charging for admissions on museums relates to the National Museums and Galleries – which are beyond the scope of this research. Whilst references to this research literature are included in Annex 3, they are not included in the main report due to the scope of this research.
As noted by Bailey et al (1997), *"The policy debate on museum charges has a long history, is wide-ranging, and has tended to be somewhat repetitive over time. It comprises a fluid mix of political ideology, institutional and political pragmatism, cultural, educational, leisure and recreational issues, professional cultures and social policy perspectives"* (1997, p.356). Any references used in the main report seek to focus on evidence about the impact of charging for admissions on museums – and as such attempts to 'park the politics' and 'ignore the ideology' around these debates.

1.6 The research also involved carrying out a **sector-wide survey of museums across the UK**. The aim of the survey was to gather evidence, information and perspectives from museums across the UK – both those that charge for admission and those that are free admission – about the impact of charging or not for admissions on the key research objectives listed above. The survey was deliberately designed to ask a range of general questions to all museums, and also to ask specific questions directly related to the museum's particular admissions charging position, and any recent changes to admissions charging at the museum.

1.7 The survey took place during March and April 2016, with promotion and communication about the survey to museums being achieved through a wide variety of channels including support from the commissioning organisations (i.e. AIM, ACE, and MALD) via social media, direct emails, website news items, newsletters, etc. In addition, other organisations and programmes also helped to promote the survey via social media and other channels (including Museums Galleries Scotland, Museums Association, Northern Ireland Museums Council, Museum Development Programmes across England, Museum Federations, National Museum Directors' Council, Collections Trust, #museumhour, etc.).

1.8 The gross number of responses received to the survey exceeded 400, and once the responses were cleaned (removing doublers, invalid responses, and those that did not provide a sufficient level of response) a total of 311 useable replies were received to the survey. These responses were from museums across the UK, and the pattern and profile of survey respondents shows that the survey is generally representative of the wider museums sector in terms of museum type, geography and museum size.

1.9 Tables 1.1, 1.2 and 1.3 summarise the survey responses by geography, by type and by size of museum (in terms of visitor numbers for 2015).

Table 1.1: Breakdown of Respondents by Nation

Nation	Percent	Count
England	74.8%	229
Northern Ireland	1.3%	4
Scotland	6.5%	20
Wales	17.3%	53

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 306

Table 1.2: Type of museum (please tick one):

	Percent	Count
Independent	69.9%	216
Local Authority	18.4%	57
University	2.9%	9
Other (please specify)	8.7%	27

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 309

Table 1.3: Size of Museum (based on 2015 visitor figures given)		
	Percent	**Count**
Less than 10,000	28.0%	87
10,000 to 19,999	9.0%	28
20,000 to 49,999	11.6%	36
50,000 to 99,999	7.4%	23
Over 100,000	9.3%	29
Unspecified	34.7%	108
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 311		

1.10 The breakdown in these tables reflects the fact that the research was commissioned by AIM (resulting in a slightly higher proportion of responses from independent museums) and that MALD were directly involved (resulting in the strong response rate from Welsh museums).

1.11 The high level of responses from museums in Wales is due to the fact that MALD, Welsh Government was one of the commissioners of the research, and this resulted in specific additional efforts being made by the research team to achieve a good response level from Welsh museums. The geographic pattern of responses therefore reflects this. It is important to emphasise that the overall findings from the survey do not change materially when Welsh responses are excluded/included – for many aspects, factors other than geographic location matter when assessing the impact of charging for admissions, and the additional level of responses from Wales has not led to any bias in the survey results in terms of the specific questions asked.

1.12 One of the key aspects of the research were the **case study visits to 20 museums** that took place. The aim of the case studies was to primarily focus on museums that had changed their charging position in recent years, and better understand the impact that changing charging had on each of the main research objectives.

1.13 Each case study involved the study team visiting the museum and meeting with key staff/governing body representatives to discuss the issues around charging for the museum, including collecting any evidence, data and information the museum had relating to the impact of charging or not, especially from any recent changes.

1.14 The museums approached to be case studies were selected on the basis of a range of factors including: the museum's overall, current admissions charging position; recent changes to the museum's admissions charging position; geographic location of the museum; size of museum (in terms of visitor numbers); and governance structure of the museum. This ensured that a good mix of museums covering all of these factors were included in the case studies – see Annex 1 for a list of the case study museums.

1.15 Finally, the research also included carrying out a range of one-to-one **consultations with key museum stakeholders across the UK**, to gather their perspectives and reflections on the issues around charging for admissions. A total of 18 consultations took place and a list of consultees is included in Annex 2.

Structure of Report

1.16 This document is the Final Report[2] from the research and is structured as follows:

- **Section 2** provides an overview of the current admissions charging landscape for museums, drawing on the findings of the survey. It highlights the current scale of charging and non-charging within museums for different types of admissions, recent trends around any changes to admissions charging including the types of change, as well as highlighting the scale of considerations about introducing or changing admission charging within museums.

- **Section 3** compares the characteristics, experiences and impacts around charging or not charging for admissions, looking at the characteristics of charging/non-charging museums, the perspectives of museums about the impact of charging or not for admissions on each of the research objectives, and the impacts reported by museums that have recently changed their overall admission charging position – from free to charging or from charging to free – on each of the research objectives.

- **Section 4** looks at those museums that are charging for admissions, and provides an overview of the types of admissions/pricing strategies used, an analysis of current pricing for museums that charge for admissions, and an assessment of the impact of increasing admission pricing.

- **Section 5** summarises the lessons learned and issues to consider around charging or not charging for admissions for museums.

- A list of the 20 case study museums that took part in the research and the individuals that were consulted at each case study is included in **Annex 1**.

- The museum stakeholders that were consulted during the research are listed in **Annex 2**.

- **Annex 3** provides the list of references and bibliography used for the research.

[2] Please note, this report is part of a suite of publications produced as part of this research study. Alongside this Final Report, there is also a Success Guide, an Executive Summary, and a Summary Report for Wales. All of these publications are available on the AIM website: www.aim-museums.co.uk.

2. SETTING THE SCENE - OVERVIEW OF CURRENT ADMISSION CHARGING LANDSCAPE FOR MUSEUMS

Introduction

2.1 This section of the report provides an overview of the current admissions charging landscape for museums, drawing on the findings of the survey. It highlights the current scale of charging and non-charging within museums for different types of admissions, recent trends around any changes to admissions charging including the types of change, as well as highlighting the scale of considerations about introducing or changing admission charging within museums.

Current Charging Landscape

2.2 In terms of the current charging position (see Table 2.1), 42% of museums charge for general admissions only; 3% charge for specific exhibitions only; 12% charge for both; 43% do not charge at all for admissions[3].

2.3 In summary, this shows that 57% of museums charge in some way for admissions to their museum, whilst 43% do not charge at all for admissions.

Table 2.1: Which of the following statements best describes the current charging/pricing policy at your museum? (please tick one):

	Percent	Count
We charge for general admissions only	42%	130
We charge for admission to specific exhibitions only	3%	9
We charge for both general admissions and admission to specific exhibitions	12%	39
We do not charge for either general admissions or specific exhibitions	43%	133

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 311.

2.4 More than one-quarter of museums reported that they had changed their charging position in the last three years (see Table 2.2).

Table 2.2: Has your charging/pricing policy changed in the last 3 years (above and beyond any inflationary increases)?

	Percent	Count
Yes	26%	80
No	74%	224

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 304

2.5 Of those museums that have changed their charging position around general admissions, Table 2.3 shows that the vast majority (70%) were museums that already charged and had changed their pricing (either increasing the scope or scale of charging), with almost one-fifth (17%) having moved from charging to free; and

[3] See Creigh-Tyte and Selwood (1998) for a review of evidence on scale and activities of Museums in the UK, including data on charging (pp.158-159).

around 11% having moved from free to charging[4]. A similar pattern is found for those that have changed their charging around specific exhibitions (Table 2.4), with an increase in charging being the most common change – although this is on a smaller scale due to the reduced number of museums that have changed their charging, as well as the number of museums that do not charge for specific exhibitions.

Table 2.3: During the last 3 years what type of change(s) have you made to charging for general admissions? (please tick all that apply)

	Percent	Count
From free to charging	11%	9
From charging to free	17%	13
Increase in charging (increase in price and/or increase in scope/range of people being charged)	70%	55
Decrease in charging (decrease in price and/or decrease in scope/range of people being charged)	6%	5
No change to general admissions charging	6%	5

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 79

Table 2.4: During the last 3 years what type of change(s) have you made to charging for admissions to specific exhibitions? (please tick all that apply)

	Percent	Count
From free to charging	8%	6
From charging to free	9%	7
Increase in charging (increase in price and/or increase in scope/range of people being charged)	22%	17
Decrease in charging (decrease in price and/or decrease in scope/range of people being charged)	5%	4
No change to charging for admission to specific exhibitions	28%	22
Not applicable - we do not have specific exhibitions	37%	29

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 79

Table 2.5: Type of Museum x Change to Charging/Admission Policy

	Yes	No	Count
Independent	33%	67%	194
Local Authority	17%	83%	52
University	0%	100%	8
Other	17%	83%	24
(Blank)	0%	100%	2
Total	80	224	304

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 304

[4] Research commissioned by the Museum of London and carried out by NCVO (Brodie, Kane & Clark (2012)) found a similar pattern - with the most common pattern being no change in charging, and for those that had changed, the most common type of change was raising the cost of admission (2012, pp.21-22)

2.6 Assessing the type of museum against those that have changed their charging position in recent years, shows that independent museums are more likely to have changed their charging than local authority museums – Table 2.5.

2.7 For those museums that have not changed their admissions charging position, there are notable proportions that have considered changing (Table 2.6) – 43% of those that do not charge have considered charging for general admissions. In comparison (Table 2.7), 55% of those that do charge have considered changing their charging for general admissions.

Table 2.6: Have you considered/thought about introducing charging for admissions to your museum? (currently no admission charge)

	Yes	No	Not Applicable	Count
For general admissions:	43%	50%	8%	101
For admissions to specific exhibitions:	34%	45%	21%	96

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 96-101. **Note:** In this table, and subsequent tables throughout the survey analysis, some totals do not sum to 100% due to rounding.

Table 2.7: Have you considered/thought about changing your admissions charging/pricing in recent years? (currently charge for admissions)

	Yes	No	Not Applicable	Count
For general admissions:	55%	40%	5%	95
For admissions to specific exhibitions:	19%	48%	33%	79

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 79-95

2.8 However, the likelihood of any changes actually being implemented, despite these notable levels of consideration, can be described as low, especially for those that do not charge currently (Tables 2.8 and 2.9).

Table 2.8: How likely is it that you will start charging in the future for general admissions? (currently no admission charge)

	Definitely	Quite likely	Not very likely	Not at all likely	Count
In the next 12 months?	1%	2%	26%	71%	97
In the next 3 years?	4%	10%	37%	49%	97

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 97

Table 2.9: How likely is it that you will start charging in the future for admission to specific exhibitions: (currently no admission charge)					
	Definitely	**Quite likely**	**Not very likely**	**Not at all likely**	**Count**
In the next 12 months?	0%	3%	27%	70%	94
In the next 3 years?	1%	15%	30%	54%	94
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 94					

2.9 More than 70% of museums that do not currently charge state that it is not at all likely they will introduce charging for general admissions within the next twelve months, with a further quarter describing it as not very likely. Looking further into the future, around one-half of this group report that it is not at all likely that they will introduce charging within the next three years, in addition to which more than one-third describe it as not very likely[5].

2.10 Similar patterns are evident within this group for the likelihood of charging for admissions for specific exhibitions (Table 2.9).

2.11 The pattern for those museums that already charge but have not changed in recent years is notably different (Tables 2.10 and 2.11). Whilst there is still a majority that report it is not at all or not very likely that they will change their charging around general admissions in the next twelve months, almost one-third state that it is quite likely that they will change their charging/pricing policy in the next three years.

2.12 The likelihood of these museums changing their charging around specific exhibitions is generally lower (Table 2.11), with more than 80% describing the likelihood of changing charging in the next three years as not very likely or not at all likely.

Table 2.10: How likely is it that you will change your charging/pricing policy for general admissions in the future? (currently charge for admissions)					
	Definitely	**Quite likely**	**Not very likely**	**Not at all likely**	**Count**
In the next 12 months?	4%	8%	49%	39%	92
In the next 3 years?	9%	32%	49%	10%	90
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 90-92					

[5] Recent survey work by the Museums Association (2015) presents a similar scale of results – with 8% of museums reporting that they had introduced charging over the past year and 12% saying they would do so in the coming year.

Table 2.11: How likely is it that you will change your charging/pricing policy for admission to specific exhibitions in the future? (currently charge for admissions)					
	Definitely	**Quite likely**	**Not very likely**	**Not at all likely**	**Count**
In the next 12 months?	1%	8%	42%	49%	88
In the next 3 years?	5%	13%	40%	43%	88
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 88					

2.13 In summary, museums that have not changed their admissions charging in recent years display different tendencies around their future contemplations and likelihoods of introducing charging. A higher proportion of those that already charge are giving consideration to changing their admissions charging position, as well as reporting higher likelihoods of actually introducing any changes compared to those that do not currently charge.

3. COMPARING CHARACTERISTICS, EXPERIENCES, AND IMPACT – CHARGING AND NOT CHARGING FOR ADMISSIONS

Introduction

3.1 This section compares the characteristics, experiences and impacts around charging or not charging for admissions, looking at the characteristics of charging/non-charging museums, the perspectives of museums about the impact of charging or not for admissions on each of the research objectives, and the impacts reported by museums that have recently changed their overall admission charging position – from free to charging or from charging to free – on each of the research objectives.

Characteristics of Charging/Non-Charging Museums

3.2 The first consideration around the characteristics of charging/non-charging museums was to assess the current admissions charging position of museums in relation to the type of museum.

3.3 Exemplifying the mixed picture around charging for admissions (and perhaps challenging the preconception that independent museums charge and local authority museums are free-entry) the survey found that 37% of LA museums do charge and 37% of independents have free-entry[6] (see Table 3.1).

Table 3.1: Type of Museum x Charging and Admission Policy

	Charge	Do not Charge	Count
Independent	63%	37%	216
Local Authority	37%	63%	57
University	11%	89%	9
Other (please specify)	70%	30%	27
(Blank)	50%	50%	2
Total	**57%**	**43%**	**311**

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 311

3.4 Apart from university museums, which are almost all free entry, no characteristic was found to determine whether a museum would charge or not, though some characteristics linked to tourism did increase the likelihood of charging. Each of these are presented below.

3.5 First, as shown in Table 3.2 museums located in areas where the visitor economy is described (by the museum) as 'key' or 'significant' are more likely to charge for

[6] This pattern is similar to that reported by Creigh-Tyte and Selwood (1998) which showed that in terms of registered museums charging for admissions to their Core Collection, 68% of independent museums charged and 32% of Local authority museums charged. Both this research and Creigh-Tyte and Selwood (1998) show growth in the proportion of museums charging for admissions when compared to that identified by Babbidge (2005) for 1960, where he found that around one quarter of museums made an admission charge - 23% of local authority museums and 41% of independent museums were charging museums (2000, pp.41-43).
Similarly, Bailey and Falconer (1998) reported that *"only a third of local authority museums charge"* (1998, p.169).

admissions (67% and 57%) than museums in areas where the visitor economy is described as 'moderate' (53%) or 'minor' (50%).

Table 3.2: Admissions Charging Position x Significance of Local Visitor Economy			
	Charge	No Charge	Count
A key sector	67%	33%	83
One of a number of significant sectors	57%	43%	44
A moderately significant sector	54%	46%	56
Of minor significance	50%	50%	22
Not at all significant	0%	100%	2
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 207			

3.6 Second, Table 3.3 shows that there is a notable pattern around the importance of museums as an attraction in the area and the likelihood of charging - those museums that are a key attraction (76%) compared to one of a number of significant attractions (57%); moderately significant attraction (56%); or attraction of minor significance (51%).

Table 3.3: Admissions Charging Position x Position as a Tourism Attraction			
	Charge	No Charge	Count
A key attraction	76%	24%	45
One of a number of significant attractions	57%	43%	70
A moderately significant attraction	56%	44%	54
An attraction of minor significance	52%	48%	33
Not at all important	25%	75%	4
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 206			

3.7 Third, assessing the level of competition for attracting visitors in relation to charging (Table 3.4) shows that those museums in 'very' or 'moderately' competitive areas are more likely to charge (64% in both instances) than those in 'slightly' (43%) or 'not at all' competitive areas (41%).

Table 3.4: Admissions Charging Position x Competitiveness of Local Area			
	Charge	No Charge	Count
Very competitive – lots of other visitor attractions in area	64%	36%	66
Moderately competitive	64%	36%	87
Slightly competitive	43%	57%	37
Not at all competitive – very few, or no, other visitor attractions in area	41%	59%	17
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 207			

Perspectives on Charging/Non-Charging

3.8 As set out in Section 2, the majority of museums have not changed their charging position in recent years (Table 2.2), but these museums were able to provide their perspectives on what they think the impact of being a free admission museum or being a charging museum has on each of the key aims/objectives of the research.

3.9 Each of the main research objectives are considered in turn below. The tables on the following page(s) summarise the main survey results around these for the two main groups of museums – those that do not charge at all for admissions (Tables 3.5 and 3.6) and those that levy some form of admission charge (Tables 3.7 and 3.8).

Table 3.5: Please answer each of the following questions based on your experience of, and your perceptions of, the impact of not charging for general admissions or specific exhibition admissions:

		Very positive	Positive	No impact either way	Negative	Very negative	N/A	Count
General admission	Number of visitors	55%	33%	5%	0%	0%	8%	106
	Mix/diversity of visitors	37%	31%	18%	1%	1%	12%	106
	Admissions income	8%	13%	32%	10%	13%	25%	101
Specific exhibitions	Number of visitors	34%	22%	16%	2%	0%	27%	102
	Mix/diversity of visitors	27%	21%	21%	0%	0%	31%	94
	Admissions income	5%	9%	30%	8%	7%	40%	97

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 94-106

Table 3.6: Reflecting on both types of charging (general admissions and specific exhibitions) together:

	Very positive	Positive	No impact either way	Negative	Very negative	N/A	Count
Spontaneous donation	24%	50%	18%	1%	0%	7%	100
Secondary spend	16%	35%	31%	0%	0%	19%	97
Dwell time	7%	26%	44%	8%	0%	14%	97

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 97-100

Table 3.7: Please answer each of the following questions based on your experience of, and your perceptions of, the impact of charging for general admissions or specific exhibition admissions:								
		Very positive	Positive	No impact either way	Negative	Very negative	N/A	Count
General admission	Number of visitors	1%	17%	50%	17%	5%	10%	96
	Mix/diversity of visitors	1%	7%	58%	21%	3%	10%	97
	Admissions income	39%	30%	20%	0%	2%	10%	95
Specific exhibitions	Number of visitors	4%	4%	19%	3%	2%	67%	95
	Mix/diversity of visitors	0%	4%	19%	4%	2%	70%	94
	Admissions income	5%	10%	11%	1%	2%	71%	93
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 93-97								

Table 3.8: Reflecting on both types of charging (general admissions and specific exhibitions) together:							
	Very positive	Positive	No impact either way	Negative	Very negative	N/A	Count
Spontaneous donation	4%	19%	33%	23%	3%	17%	93
Secondary spend	4%	18%	56%	6%	0%	17%	91
Dwell time	6%	33%	41%	2%	1%	18%	91
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 91-93							

Impact on Visitor Numbers

3.10 Those museums that do not charge report positively on the impact of free admission on visitor numbers (88% say that it has a positive or very positive impact). Some base this finding on historical experience of charging and the impact that occurred then, others report anecdotal findings and evidence – especially around free admission helping to encourage repeat visits from local people.

3.11 Conversely, those that do currently charge for admissions most commonly report that this has no impact on visitor numbers (50%) with a small proportion (less than one-fifth in each case) reporting more positive or negative impacts.

Impact on Diversity of Visitors

3.12 In terms of the mix and diversity of visitors, whilst 68% of museums that do not charge for admissions feel that this has a positive or very positive impact on the mix of visitors, 58% of those that do charge report that charges have no impact on the mix or diversity of visitors.

3.13 Those that do charge emphasise the role of special offers for particular groups to reduce any potential negative impacts, with the biggest concern relating to the impact of charging on visits from local people, as well as young people and those on lower incomes. The concern about the impact of charging on local people is supported by AIM Visitor Verdict data[7] which shows local visitors (i.e. visitors from same county as the museum) accounting for a higher proportion of visitors to free admission sites (44% of visitors are from the same county), than paid admission (26% of visitors are from the same county). Analysis of the survey from this research support this finding.

3.14 More generally, the research suggests that charging does not affect the social mix of visitors to museums. AIM Visitor Verdict shows there is very little difference between the proportions of different social grades of visitors to free admission sites and to paid admission sites.

3.15 According to AIM Visitor Verdict data (analysed in early July 2016), lower social grades - C2 and DE - accounted for a slightly greater proportion of all visitors at paid admission museums, than at free admission museums (25% in the former, 20% in the latter). Higher social grades - AB and C1 - accounted for similar proportions for both free admission and paid admission museums (62% and 60% respectively for AB, and 17% and 16% for C1).

3.16 However, generally speaking, the social mix of visitors to museums (whether charging or free) is not representative of wider society – with higher social grades (e.g. AB) over-represented and lower social grades (e.g. C2 and DE) under-represented.

3.17 Available via NOMIS, using data from the 2011 Census, analysis by the Market Research Society has produced good approximations of the proportions of the UK population which sit within these classifications[8]. The data shows that the majority

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[7] AIM Visitor Verdict is a visitor survey and benchmarking service for small and medium sized visitor attractions. Developed in 2013 by BDRC Continental with the Association of Independent Museums & financial support from Arts Council England, the service is open to all visitor attractions and aims to provide a low cost method of generating comprehensive and robust feedback from their visitors. For more information, see: https://www.visitorverdict.com/

[8] Nomis, Approximated social grade – Household Reference Person (HRP) aged 16-64, accessed at https://www.nomisweb.co.uk/census/2011/QS611UK/view/2092957697?cols=measures

of people (52%) sit within the C1 and C2 social grades, with just over a quarter (26%) in the lower D and E grades. 22% sit within the higher A and B social grades.

3.18 When comparing these figures with those from AIM Visitor Verdict for visitors to museums - both paid and free - there is a significant difference between museum visitor demographics, and national demographics (see Table 3.9). For museums AIM Visitor Verdict shows AB social grades clearly account for the highest individual group - 60% for paid admission and 62% for free admission museums. Whereas, for the UK as a whole these groups accounted for 22% of the population. Conversely, the proportions of visitors falling within the C2 and DE groups (25% for paid admission museums and 20% for free admission museums), were much lower than the national picture, where close to 47% of people are in these groups.

Table 3.9: Summary of Analysis of Social Mix of Museum Visitors

	AIM Visitor Verdict 2016			Approximated Social Grade (UK, ONS)
	AIM Consortium	Paid Admission	Free Admission	
AB	61%	60%	62%	22%
C1	16%	16%	17%	31%
C2	9%	10%	7%	21%
DE	14%	15%	13%	26%

Source: DC Research 2016 analysis of AIM Visitor Verdict and ONS (ONS Crown Copyright Reserved [from NOMIS on 11 July 2016]) data. Totals subject to rounding

3.19 Similar evidence (about over-representation of upper socio-economic groups and under-representation of lower economic groups) is found in other data on museum visitors (e.g. Taking Part, Scottish Household Survey, National Survey for Wales[9]). There are museums that are the exception to this pattern – achieving a social mix and diversity of visitor that reflects their community, but these are not distinguished by whether they charge for admissions or not. This broad pattern needs to be acknowledged[10].

Overall Impact on Income – including Secondary Spend and Donations

3.20 Not surprisingly, the vast majority of museums that charge for admission report on the positive impact this has on income. When it comes to income from other sources – both on-site secondary spend and spontaneous donations – overall, charging is not the biggest influencing factor on either of these sources.

3.21 Many museums (both free admissions and those that charge) report that other factors (rather than the charging position) influence the level of donations received – most notably the overall strategy and approach of the museum to pro-actively seek donations (or not).

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[9] For Taking Part see: https://www.gov.uk/government/statistics/taking-part-201516-quarter-2-statistical-release; for Scottish Household Survey see: http://www.gov.scot/Resource/0048/00484186.pdf; for National Survey for Wales see: https://statswales.gov.wales/Catalogue/National-Survey-for-Wales/2014-15.

[10] Creigh-Tyte and Selwood (1998) also found the same pattern – noting that *"Museums have audience profiles that are unrepresentative of the population – a higher percentage of A and Bs, and a lower percentage of C2s and Ds and Es"* (1998, p.161). Additionally, Bailey and Falconer (1998) reported on the findings from MGC-commissioned research which *"re-confirmed earlier findings that higher socio-economic groups (A, B, C1) are disproportionately represented amongst museum visitors"* (1998, p.169).

3.22 Adopting good practice in terms of the use, design and position of donations boxes as well as the attitude and approach of staff and volunteers to seeking donations from visitors were frequently mentioned as important aspects around maximising donations for museums.

3.23 Some trends did emerge around charging and secondary spend. For example, AIM Visitor Verdict shows visitors to paid admission sites are more likely to have visited the shop and purchased, than those to free admission sites. Visitors who had not visited the shop at all was higher at free admission sites (29% compared to 20%).

3.24 A similar pattern emerges for on-site catering where visitors who had used the on-site catering at paid admission sites accounted for a higher proportion of visitors (54% compared to 42%). These findings suggest that the likelihood of secondary spending (on either retail or catering) may be slightly higher at museums that charge for admission.

3.25 Interestingly, however, the survey showed that half of free-entry museums believe being free has a positive impact on secondary spend, whilst only one-fifth of museums that charge believe so. One of the more frequent positive impacts reported by free museums is an overall increase in visitors leading to an increase in sales.

3.26 Once again, many museums (both those that are free admissions and those that charge) report that factors other than the charging position influence the level of secondary spend – most notably the quality of the retail and on site catering offer.

Impact on Visitor Satisfaction / Quality of Visit

3.27 The research shows that museums which charge admission have longer dwell times than those that are free entry. This was evidenced both by data from AIM Visitor Verdict and the survey of museums.

3.28 AIM Visitor Verdict data shows that for free admission museums, dwell time of visitors tended to fall towards the lower end of the scale with 10% of visitors staying for up to half an hour, and a further 69% staying for between 30 minutes and 2 hours. Conversely, for paid admission museums, dwell time of visitors fell towards the other end of the scale, with 45% of visitors staying for more than 2 hours (compared with 21% in the case of free admission sites). Only 2% of visitors to paid admission museums stayed for less than 30 minutes, with 53% staying for between 30 minutes and 2 hours. As such, the data supports the argument that dwell times are longer in museums that charge for admissions than in free admission museums.

3.29 AIM Visitor Verdict data also showed that free entry museums have higher rates of repeat visits (39%) compared to those that charge for admission (31%). The survey for this research found that one-third of free entry museums view the frequent, shorter visits as a positive impact of free admission.

3.30 AIM Visitor Verdict also shows that for overall enjoyment of visits (rated on a scale of 1 to 10 by the visitor), there is very little difference between the quality of visit at paid admission sites (average score of 8.7) and free admission sites (average score of 8.9), suggesting that charging or not charging is not a major influence on the overall quality of the visit.

Impact on Reputation and Relationships

3.31 Museums also reported how their current charging position affects relationships and reputations with stakeholders and funders; local community and friends and members. The large majority of museums that do not charge see free admission having a positive impact with these groups, especially with their local community (see Table 3.10).

Table 3.10: Does not charging for admissions influence/affect your relationship with:				
	Yes	**No**	**Not Applicable**	**Count**
Stakeholders and funders?	55%	21%	25%	97
Local community?	79%	15%	6%	99
Friends and members of your museum?	64%	20%	17%	96
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 96-99				

3.32 In contrast, for museums that charge, far fewer state that charging affects these same relationships. Most often, museums report that there is understanding across these groups about the rationale for charging, and as such it does not affect relationships. The exception being relations with the local community which some museums report can be negatively affected by charging.

Table 3.11: Does charging for admissions influence/affect your relationship with:				
	Yes	**No**	**Not Applicable**	**Count**
Stakeholders and funders?	18%	59%	23%	91
Local community?	37%	57%	7%	92
Friends and members of your museum?	18%	57%	25%	91
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 91-92				

Impact of Changing from Free to Charging

3.33 As noted earlier (see Section 2, Tables 2.3 and 2.4), the number of museums that have changed their position (from free to charging) is relatively small. However, combining the relevant survey responses with the more detailed findings from the case study visits for each grouping has provided a good basis on which to conclude the following overall findings.

3.34 Museums that have moved from free to charging most commonly report that this has a negative impact on overall visitor numbers, with some reporting notable decreases in visitors, especially in the number of local visitors.

3.35 Museums that have moved from free to charging typically report that this has had no impact on the mix and diversity of visitors[11], although data on social mix can be limited for some museums, especially when they were free. The example survey responses below show the common types of response:

"…when we have free events the diversity mix doesn't change much from our paid for activities."

"The same demographic continues to visit."

"…cannot quite quantify that as we have not done any detailed visitor research last year, but I have the impression that we have fewer local visitors as they are less prepared to pay than incoming visitors (tourists and day-trippers)."

3.36 All of the museums that have moved from free to charging report a positive impact on admissions income, and for some this has been a notable/substantial level of income which has strengthened the overall financial position of the museum. As one survey respondent noted: *"It is generating hundreds of thousands of pounds."*

3.37 Spontaneous donations commonly decreased when moving from free to charging, although such decreases are more than compensated by increases in admissions income. Many museums report that factors other than charging have a greater influence on donations. As one survey respondent explained: *"We have fewer donations, but overall charging has still had a very positive effect on our income."*

3.38 Whilst a mixed picture emerged about the impact of charging on secondary spend, there is evidence that visitors to paid admission sites are more likely to visit the shop and purchase (or use on site catering), than those to free admission sites. However, the stronger influence of factors other than charging on secondary spend - most notably the quality of the (retail and on-site catering) offer – was noted by many:

> *"We charge, and it is expected. The cafe is unaffected and quality and selection of shop goods is a better driver of purchasing."*
>
> *"Shop sales have remained at or above normal levels."*

3.39 Some museums noted that overall secondary spend had not changed whilst visitor numbers had decreased – suggesting that the visitors lost when moving from free to charging may be those who typically did not make any secondary spend when visiting.

[11] This finding is supported by Bailey et al (1997) who found that: *"It is unclear whether, and to what extent, the introduction of charges affects the total number of visitors, their social composition, or their propensity to return. Museums that have introduced general admission charges recently report both reductions and increases in visitor numbers, and only marginal alterations to the social profile of visitors."* (1997, p.359)

3.40 Museums that have moved from free to charging for general admissions report that this had both positive and negative impacts on relationships and reputation. Whilst there is typically an appreciation from stakeholders about the need to increase income, museums can experience a negative reaction from the local community, with communication and planning being key elements in mitigating such reactions.

3.41 Set out below are summaries of each of the case study museums visited as part of this research that have moved from free admission to charging for admissions in recent years. Each case study summarises the change to admissions charging made by the museum, and highlights the key impacts of the change as well as any lessons learned.

CASE STUDY EXAMPLES: IMPACT OF MOVING FROM FREE TO CHARGING

Birmingham Museums Trust introduced charging for its heritage sites in 2011[12], with Thinktank always having charged, and the Birmingham Museum and Art Gallery remaining free to enter. The Trust has free event days at the heritage sites, and charge £3 to enter Thinktank after 3pm. The Trust found that the response of staff to charging being introduced was critical to the customer reaction. Some staff were positive about charging, with others being apologetic. The Trust worked hard to ensure that the culture was positive about charging, with an emphasis on quality and value for money. At Thinktank, the introduction of charging for entry to the Planetarium reduced queues, and created a sense of exclusivity and extra value, improving visitor experience as well as raising income.

Brighton Museum & Art Gallery went from free to charging for non-residents in May 2015, and have found that whilst visitor numbers have markedly dropped, dwell time and spend per visitor have increased. Brighton Museum found that the quality of their visitor data collection as a free museum was not detailed enough for charge based business planning, and the fall in visitor numbers was greater than anticipated (data quality has significantly improved through more detailed visitor engagement). Brighton learned that although residents go free, the perception that your museum charges impacts on numbers. Ideally, a long lead in time is advisable to better communicate the change, as is supportive programming, especially aimed at local audiences.

Cyfarthfa Castle Museum and Art Gallery moved from free to charging in 2014 (£1 for adults), and increased the scope of pricing in 2015 (£2 for adults and £1 for concessions/students) with the aim of generating income. The move from free to charging resulted in a decrease in visitor numbers (from more than 89,000 in 2013-14 to almost 67,000 in 2014-15 and just over 53,000 in 2015-16). The museum noted that fewer members of the local community have visited since charging was introduced, whilst dwell time of visitors has increased. Charging has increased income from admissions and secondary spend has not been affected, although there has been a notable decrease in donations. The museum feels that potential visitors who knew the museum was previously free are more likely to be put off visiting by the charge. Lessons include the importance of 'getting the message out there' and ensuring local people understand why there is now a charge. Also keeping the same charge for a sustained period of time, and promoting the value of the museum to visitors is important.

The Lightbox in Woking has a continuous programme of temporary exhibitions, and went from charging for these exhibitions when it opened in 2007, to free in 2009, and back to charging again in 2014, whilst maintaining free access to its permanent galleries throughout, with visitor numbers staying the same in 2014 with no noticeable change to visitor diversity. Ahead of the move to reintroduce charging in 2014, the Lightbox researched its options in detail, and found that the annual pass scheme was the best approach for them, as it promoted increasing return visits. At the same time, the Lightbox also increased the cost of friend's membership by the amount of the pass, and included it as part of the membership card, with no complaints. The Lightbox benefited by being transparent about the transition to charging, and by working hard with all the community projects it is engaged with to ensure that key groups were not alienated.

[12] Aston Hall; Blakesley Hall; Museum of the Jewellery Quarter, Sarehole Mill, Soho House, Weoley Castle.

Petersfield Museum and the Flora Twort Gallery, an independent museum in Hampshire with very little public funding, went from free to charging in 2015. It charges £2 for entry for adults, or £3 for both sites, with an annual pass being £5. Petersfield found that whilst income had significantly increased, the impact of charging was negative in terms of visitor numbers, dropping by 35%, and anecdotally finding that there are fewer local visitors. However, one year on from the introduction of charging, visitor numbers are increasing again. The Museum had to address concerns from exhibiting artists that potential customers could be deterred by charging by giving such artists 10 free tickets. Additionally the Museum will have three "free Saturday's" each year. Since charging was introduced, volunteers have gradually taken on a more active role in promoting the Museum, and have become increasingly unapologetic for having to charge.

Royal Cornwall Museum introduced charging, on the basis of a 12-month pass, in 2011 to mitigate in part for the loss of Renaissance funding. Visitor numbers dropped significantly in the first year (although there was no formal process for collecting accurate visit data at the time), but have grown in the past couple of years, with Royal Cornwall Museum investing in marketing with joint initiatives as part of the Cornwall Museum Partnership. The museum charges £4.50 plus a donation of £1, and has reduced the threshold of free entry from under 18 to under 16. Royal Cornwall Museum emphasised the importance of accurate and meaningful data in decision making, the need to challenge myths and assumptions that are held by staff, volunteers and the importance of being prepared to try new things.

York Art Gallery introduced charges for general admissions in 2015 following reopening after a substantial redevelopment and extension programme. Standard entry is £7.50 with free admission for children, discounts for young people, and income-related concessions. Also an annual pass (YMT Card) is available to all, with income-related discounts also available for this, including free cards to York residents. The take up of the YMT Card has proved popular and is exceeding expectations. The reason for introducing charging was to help address cuts in local authority funding. Total visitor numbers were down 40% on anticipated numbers following reopening. The impact financially has been very positive and whilst donations have decreased (from a low base), retail spend per visitor has more than doubled. York Art Gallery received a lot of profile (locally and nationally) due to the introduction of charges, and whilst the introduction of charges has been very positive financially, managing the messaging and the PR associated with the change has been a real challenge and is the key area of lessons to be learned.

Impact of Changing from Charging to Free

3.42 Following on from the previous section about moving from free to charging, a similar pattern emerges with museums that have moved from charging to free – i.e. as noted earlier (see Section 2, Tables 2.3 and 2.4), the number of museums that have changed their position (from charging to free) is relatively small. However, combining the relevant survey responses with the more detailed findings from the case study visits for each grouping has provided a good basis on which to conclude the following overall findings.

3.43 The vast majority of museums that have moved from charging to free report a positive impact on overall visitor numbers, with some reporting a doubling of visitors, especially a greater number of repeat visits, and more 'casual' visits (i.e. shorter dwell times). For example, a couple of survey respondents noted:

"People feel free to come and go throughout the day, we often see people on repeat visits."

"People don't feel obliged to get value from their visit by staying for a certain amount of time and can choose to do either one long visit or a number of shorter visits."

3.44 Museums that have moved from charging to free present a mixed picture in terms of the mix and diversity of visitors, with 'no impact' and 'positive impact' being reported in equal numbers. Whilst data on social mix can be limited for some museums, those reporting a positive impact particularly noted more local visitors:

"Many visitors comment on being pleased not to have to pay and lots of families visit as groups. I think it encourages repeat visits from local residents."

"We had more local and elderly visitors."

"More families and locals."

3.45 The vast majority of museums that moved from charging to free reported a positive impact on spontaneous donations as a result. The extent to which this increase in donations makes up for the loss of admissions income varies from museum to museum – some experience a net gain in income whilst others are worse off financially.

"There has been a significant increase in donations on site since free admission was introduced over ten years ago."

"We have found that non charging and just asking for donations resulted in an income drop."

"Donations are variable and depends on the person on reception desk to persuade visitors."

3.46 A mixed picture emerged about the impact of moving from charging to free on secondary spend. In many cases, museums reflected that other factors influenced the level of secondary spend, especially the quality of the retail and catering offer. Although one of the more frequent positive impacts reported by free museums is an overall increase in visitors leading to an increase in overall sales.

3.47 There is limited data on dwell time from those that have moved from charging to free, but most reported no impact, and those that reported a positive impact typically related this to shorter, more frequent visits rather than an increase in the dwell times per visit:

"Tourists didn't mind paying for parking…so would stay longer. Locals would pop in and out, returning over again."

"Shorter but more numerous visits."

3.48 Museums moving from charging to free reported positive impacts on relationships and reputation with stakeholders, local community and friends and members. In particular, moving to free admissions helped to develop stronger and better links with the local community – encouraging access, and raising the profile of the museum.

3.49 Set out below are summaries of each of the case study museums visited as part of this research that have moved from charging to free (which includes recent moves from charging to free as well as more historic changes). Each case study summarises the change to admissions charging made by the museum, and highlights the key impacts of the change as well as any lessons learned.

CASE STUDY EXAMPLES: IMPACT OF MOVING FROM CHARGING TO FREE

Caldicot Castle moved from charging to free in June 2014, removing the pay barrier to increase footfall, as most visitors were visiting the parkland only. Free entry was one of a number of changes, which also included taking catering in house and remodelling the retail offer. The net result of all these changes was an increase in visitor footfall and income from the shop and café. Caldicot Castle felt that it could have improved its communication to staff about why the changes were being made, and secondary spend could have been even higher if a coordinated plan had been in place.

Cannon Hall Museum is a free admission museum, although it did introduce charging back in the mid-1990's. The introduction of a nominal charge had a major negative impact on visitor numbers, reducing from around 70,000 to less than 18,000 within two years. Whilst numbers increased above 20,000 over subsequent years, it was not until the museum reverted to free admission in 2002-3 that visitor numbers recovered substantially – exceeding 60,000 within one year, and increasing over the subsequent years, exceeding 140,000 at the end of the last decade, and reaching close to 100,000 in the last year. Visitor numbers to the Park in which Cannon Hall is located remained stable over the time of the charge, suggesting it was the charge itself that was the barrier to people visiting the museum. Cannon Hall (and Barnsley Museums) is a very different service today – both in terms of the offer, the organisational culture and the approach to income generation. The service has a well-developed and successful approach to income generation generally, but one that does not include charging for admissions to the museum. The strategy on charging is to remain free, and this is strongly supported politically in Barnsley. Key lessons around maximising income whilst offering free admission include being prepared and able to exploit retail opportunities, being up front and proactive around seeking donations, ensuring that staff are trained in 'making the ask', and understanding your audience – collect and use visitor data. More generally, advocacy is key, and it is important to have the information to be able to make the case for culture at every opportunity.

Ceredigion Museum offers free admission, and has done so for a number of years. A previous attempt to introduce charging took place in 1999 with the introduction of a nominal charge of £1, and this had a substantial impact on visitor numbers, falling by more than 60% (from close to 40,000 to around 15,000), as well as creating negative publicity in the local media, so the decision was made to scrap the charge. Admission charges have not been attempted since, partly due to this experience but primarily due to the ethical issue around charging given the anti-poverty agenda in Wales and the museum's role in supporting this. The museum is about to undergo a redevelopment project and will seek to develop other income generation opportunities through this. A recent example of success is around donations – where the introduction of a new donations box (following good practice) led to a 25% increase in the level of donations received.

Derby Museums Trust[13] recently investigated introducing charging at Pickford's House, which has 20,000 visitors per year. Business planning suggested that introducing charging at this venue would result in a net increase of income of around £19,000, and the Trust felt it was not worth pursuing, and reinforced the Trust's position on free entry. The Trust is about to experiment with an assertive 'donate what you think' model (so that Gift aid can be claimed) a forthcoming exhibition, and will use evidence and learning from this to inform their approach future exhibitions. The Trust plans to continue with free entry, raising income from donations (which the Trust feels is easier to do when a museum does not charge), secondary spend and conferencing.

Elgin Museum moved from charging for admissions to free entry in 2013 aiming to make the museum more accessible. The museum managed to arrange corporate sponsorship support to help offset the lost admissions income initially. As well as seeing visitor numbers almost double, Elgin Museum emphasised that the implementation of a pro-active donations strategy (including effective use of donation boxes, building on good practice guidance) helped to offset much of the lost admissions income, which alongside the ongoing sponsorship has put the museum in an improved financial situation as well as leading to far greater connections and engagement between the museum and the local community due to free admissions – exemplified through the increases in the number of children visiting the museum.

[13] Derby Museums Trust was included as a case study to ensure that museums that had given due consideration to introducing charging for admissions (but had not actually implemented admissions charging) were included in the various case study types. Therefore, whilst Derby is included in this section of museums that have moved from charging to free, it should be noted that Derby has not previously charged for admissions.

4. CHARGING FOR ADMISSIONS – APPROACHES, STRATEGIES, PRICING AND IMPACT

Introduction

4.1 This section looks at those museums that are charging for admissions, and provides an overview of the types of admissions/pricing strategies used, an analysis of current pricing for museums that charge for admissions, and an assessment of the impact of increasing admission pricing.

Admission Charging/Pricing Strategies

4.2 For those museums that charge for admissions, the survey found that a diverse range of pricing strategies are adopted, which typically reflect the common types of visitor (e.g. adult, child, concession and family tickets are most common).

4.3 Within these overall types some museums offer additional flexibility and the use of variable rates within these common categories. Most frequently this related to children, particularly where there was an admission charge for slightly older children, but those under a certain age were admitted for free. For families, there are examples of varying charges for different sizes or types of families, in addition to which some museums indicated that their family tickets were 'flexible' i.e. the price was fixed, but there was some leniency in the size/composition of the 'family'[14].

4.4 Beyond this, the other more common pricing strategies can include discounts (or free entry) for: groups, Friends/Members, disabled persons and carers, or local residents, as well as other incentives and offers such as annual passes, season tickets, free repeat visits, joint ticketing with other sites and attractions, discounts for members of particular organisations, etc.[15]

4.5 Other pricing innovations include discounts for online ticket purchasing; discounts with particular offers/voucher schemes; reduced rates on certain days/times of the week as well as emergence of a 'pay what you think' model – something that seems to be increasing in prominence.

4.6 One issue that did emerge is about the potential complexity of pricing – given the range of tickets; range of offers; as well as Gift Aid and/or voluntary donation options. Some museums note that such a range of tickets/prices can be administratively burdensome for the museum and complex for the potential visitor. There is a move (e.g. within some of the case study museums) to simplify their pricing structure – to make it easier both for their systems, for staff/volunteers, and for visitors.

4.7 The survey found that almost 40% of museums operate a Gift Aid scheme for admissions, with twice as many (26%) using the additional 10% scheme compared to the annual pass scheme (13%). Of the remainder almost one-quarter state they are not eligible for Gift Aid, with the remaining 40% stating that they do not operate a Gift Aid Scheme for admissions – the vast majority of which are independent museums.

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[14] See the Flexible Family Ticket Guidelines produced by Kids in Museums for a summary of research findings (as well and some guidelines) about flexibility around family tickets – Kids in Museums (2010).

[15] This pattern of discounts (and the commonality of discounts for particular groups) is very similar to that reported by Bailey and Falconer (1998, pp. 170-171).

Table 4.1: Do you claim Gift Aid on admissions?		
	Percent	**Count**
Yes - the additional 10% scheme	26%	55
Yes - the annual pass scheme	13%	28
No	39%	83
Not applicable - we are not eligible for the scheme	22%	47
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 213		

Analysis of Current Pricing

4.8 In terms of the average prices charged for admissions, Table 4.2 summarises the key results around general admissions pricing from an analysis of the survey results for those museums that charge for admissions. The results show that:

- The average price for an adult ticket for general admission is just less than £6 with a notable range of prices underneath this average – from less than £1 to £20+ (see Table 4.2).
- The average price for a child ticket for general admission is almost £3, and again the range of prices underneath this average is notable – from free to £14.
- The average price for a concession ticket for general admission is just over £5 with a notable range of prices underneath this average – from less than £1 to £20+.
- The average price for a standard family ticket for general admission is almost £19 and the range of prices underneath this average is from £4 to £60+.

Table 4.2: Summary of prices for general admissions				
	Adult	**Child**	**Concession**	**Family**
Mean	£5.93	£2.82	£5.02	£18.85
Median	£5.00	£2.00	£4.05	£16.00
Lower	£0.50	£0.00	£0.00	£4.00
Upper	£24.00	£14.00	£21.50	£63.00
Number of Responses	154	150	154	65
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 65-154				

4.9 In terms of average prices relative to other factors, analysing general admission adult prices against other factors found some notable patterns:

4.10 First, there is little difference between average prices by type of museum (see Tables 4.3 and 4.4). Whilst independent museums are more likely to charge than local authority museums, the average prices for those of both types that do charge is very similar.

Table 4.3: Average General Admissions Price x Museum Type (Independent)				
	Mean (£)	Lower (£)	Upper (£)	N
Adult	5.82	0.5	24	124
Child	2.75	0	14	121
Concession	4.92	0	21.5	124
Family	19.58	4	63	51
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 51-124				

Table 4.4: Average General Admissions Price x Museum Type (Local Authority)				
	Mean (£)	Lower (£)	Upper (£)	N
Adult	5.87	1	12	15
Child	3.30	0	9	14
Concession	4.72	0.5	10.5	15
Family	15.92	5	29.2	9
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 9-15				

4.11 Second, a pattern emerges which shows that the more significant the visitor economy is to the local area where the museum is located, the lower the average price for admissions (see Table 4.5). This is likely to be due to the increased levels of competition for visitors in areas where the visitor economy is significant.

Table 4.5: Average Adult General Admissions Price x Local Tourism Significance		
	Average	Count
A key sector	£5.48	48
One of a number of significant sectors	£5.63	22
A moderately significant sector	£6.83	29
Of minor significance	£7.63	11
Not at all significant		0
(Blank)	£5.55	44
Average/Total	£5.93	154
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 154		

4.12 Third, the survey findings clearly show that the more important the museum is as an attraction to the local area, the higher the average price for admission that is charged (Table 4.6).

Table 4.6: Average Adult General Admissions Price x Museum Attraction Significance		
	Average	**Count**
A key attraction (i.e. a destination museum which draws people into the area)	£8.20	27
One of a number of significant attractions	£6.19	37
A moderately significant attraction	£5.34	28
An attraction of minor significance	£3.49	17
Not at all important	£9.50	1
(Blank)	£5.55	44
Average/Total	£5.93	154
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 154		

4.13 Fourth, there is also an emerging pattern of higher average prices relative to the size of the museum (in terms of visitor numbers) i.e. the larger the museum the higher the average price. Whilst this is particularly clear for the museums at the two ends of the size spectrum (by visitor number), the pattern is not evident in the museums in the middle size groupings – see Table 4.7.

Table 4.7: Average Adult General Admissions Price x Museum Size (based on 2015 visitor figures)		
	Average	**Count**
Less than 10,000	£3.58	48
10,000 to 19,999	£5.00	15
20,000 to 49,999	£7.66	18
50,000 to 99,999	£6.71	14
Over 100,000	£14.43	9
Unspecified	£6.09	50
Average/Total	£5.93	154
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 154		

4.14 Finally, analysis of adult prices for general admissions by geographic location (Table 4.8) found that average prices are higher for museums in the south (i.e. London, South West of England and South East of England) than for other areas of England combined, as well as compared to overall average across the UK.

Table 4.8: Average Adult General Admissions Price x Particular Regional Breakdowns			
Adult	**South (SW, SE, L)**	**All Other - England**	**ALL (UK)**
Mean	£6.73	£5.45	£5.93
Lower	£0.50	£1.00	£0.50
Upper	£24.00	£14.00	£24.00
Count	68	51	154
Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 154			

Impact of Changing: Increasing Pricing

4.15 As noted earlier (see Section 2, Tables 2.3 and 2.4), the number of museums that already charged for admissions, and have changed their pricing position by increasing the scope and/or scale of their charging in recent years is by far the most common type of change.

4.16 Table 2.3 showed that 70% of the museums that had changed their admissions charging in recent years were museums that already charged and had increased their pricing (either increasing the scope or scale of charging) with Table 2.4 showing a similar pattern (on a smaller scale) for admissions charging around specific exhibitions).

4.17 This section therefore combines the relevant survey responses from this group along with the more detailed findings from the case study visits.

4.18 Each of the main research objectives are considered in turn below for the group of museums that have increased their admissions charging in recent year. The tables on the following page – Tables 4.9 and 4.10 – summarise the main survey results around each of the key research objectives for this group of museums and the findings that follow are based on a combination of the survey and case study findings.

Table 4.9: Please answer each of the following, based on your experience of changing charging for general admissions and/or admissions to specific exhibitions to your museum:

		Very positive	Positive	No impact either way	Negative	Very negative	N/A	Count
General admission	Number of visitors	2%	20%	64%	8%	2%	4%	50
	Mix/diversity of visitors	2%	8%	76%	4%	0%	10%	49
	Admissions income	14%	61%	18%	0%	0%	6%	49
Specific exhibitions	Number of visitors	0%	6%	23%	0%	0%	70%	47
	Mix/diversity of visitors	0%	0%	24%	0%	0%	76%	46
	Admissions income	2%	4%	15%	2%	0%	77%	47

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 46-50

Table 4.10: Reflecting on both types of charging (general admissions and specific exhibitions) together:

	Very positive	Positive	No impact either way	Negative	Very negative	N/A	Count
Spontaneous donation	2%	13%	69%	4%	0%	13%	48
Secondary spend	2%	27%	56%	4%	2%	8%	48
Dwell time	0%	31%	58%	0%	0%	10%	48

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 48

4.19 Museums that already charged and increased the scope or scale of their pricing in recent years typically report that the increase in pricing did not have an impact on visitor numbers – with almost two-thirds of survey respondents in this category reporting no impact (Table 4.9). The following responses to the survey give examples of the common types of response:

"We had more visitors so it certainly did not have a negative impact."

"Visitor numbers have been showing an upward trend for the last 4 years."

"Number of visitors hardly changed at all."

4.20 Similarly, the vast majority of museums that increased prices reported that this had no impact on the mix and diversity of their visitors. Most museums noted very little change in visitor mix at all, with some museums offering specific activities (e.g. outreach), or incentives (e.g. special offers) to counteract any potential impacts. For example, one museum commented:

"We run bi-yearly open weekends to ensure we are targeting free vouchers for admission to less affluent areas of…based on the indices of deprivation. This therefore means we can maintain a diverse mix of visitors to the museum."

4.21 These findings are supported by the AIM Visitor Verdict results outlined earlier (see *Impact of Diversity of Visitors* subsection within Section 3) – where the social mix of visitors is generally the same between free admission museums and museums that charge for admissions. These findings were reinforced by comments from survey responses:

"Our visitor surveys did not reveal any change."

"Little change in the % make up of the visitor population."

4.22 According to the survey results (Table 4.9) the vast majority (three-quarters) of the museums that increased pricing noted that this has had a positive impact on admissions income, of varying scales.

"Since increasing the admission price 4 years ago admission income has increased considerably."

"While there has been a slight drop in number of visitors, the income raised from admissions has increased."

4.23 Almost 70% of museums that increased pricing noted that it had no impact on spontaneous donations (Table 4.10). The consensus from museums around this points out that other factors rather than charging for admissions were regarded as more important in terms of the level of donations.

4.24 More than half of museums that increased charging reported that this had no impact on secondary spend – with more than one-quarter reporting positive impacts, with such positive impacts being supported by other evidence set out earlier in this report (Section 3).

4.25 Museums that increased pricing are the least likely to report this has affected their reputation and relationships with stakeholders, local community or friends and members. There is typically an appreciation from stakeholders about the rationale for increasing pricing and strengthening the financial position of the museum.

4.26 For museums that have increased their charging, almost 60% report no impact on dwell time of putting up prices, whilst almost one-third report positive impacts on dwell time (i.e. some visitors staying longer) – see Table 4.10. Although it should be noted that many museums do not have reliable up to date data on dwell time.

Table 4.11: Did changing charging for general admissions and/or admissions to specific exhibitions influence/affect your relationship with:

	Yes	No	Not Applicable	Count
Stakeholders and funders?	6	39	4	49
	12.2%	79.6%	8.2%	
Local community?	11	36	3	50
	22.0%	72.0%	6.0%	
Friends and members of your museum?	9	34	6	49
	18.4%	69.4%	12.2%	

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 49-50

4.27 Museums that already charge for admissions and have increased their pricing are the least likely to report that this has affected their reputation and relationships with stakeholders, local community or friends and members – see Table 4.11. Museums in this group typically report that there is an appreciation - from stakeholders in particular - about the rationale for increasing pricing and strengthening the financial position of the museum.

4.28 Reflecting on the findings presented above, it should be noted that many museums use a change in the visitor offer (which can take the form of a substantial redevelopment, a new gallery space, the opening of a new exhibition, or a smaller scale change in the offer) to support an increase in price, helping to reduce any potential negative impacts – evidence from the survey and case studies shows that simply putting the price up without any change in the offer is more likely to result in negative impacts for a museum in terms of the key research objectives considered here.

4.29 Set out below are summaries of each of the case study museums visited as part of this research that have increased the scope and/or scale of their admissions charging. Each case study summarises the change to admissions charging made by the museum, and highlights the key impacts of the change as well as any lessons learned.

CASE STUDY EXAMPLES: IMPACT OF CHANGING PRICING FOR ADMISSIONS

Bristol Museums have recently changed their charging policy with regard to specific exhibitions, moving from a variable approach to a simplified three-tier approach – with standard rates for touring exhibitions (£5 adults, £4 concessions, kids free); an innovative 'pay what you think' model for in-house exhibitions; and free entry for community exhibitions. This shift has allowed Bristol Museums to be more consistent and offer clarity around charges, and has not had an impact on visitor numbers or the profile of visitor which is largely unchanged, but the dwell time of visitors to specific exhibitions is higher than for general visits. Positive impacts on both donations and secondary spend are attributed to other factors rather than charging, but the new charging models have led to substantial increased income (£150,000 to £200,000 a year). Key lessons include being consistent with charges so that the public understand the offer (charging different prices for different exhibitions can suggest difference in quality) and the importance of communicating the changes and the reasons for charging well, especially with the 'pay what you think' model, and review progress using hard data - not assumptions.

The Chatham Historic Dockyard Trust have increased their annual pass adult tickets from £19.50 to £24 in 2016, based on significant product improvement, increasing both the visitor experience and dwell time as well as to support a strategy of targeted discounting (directly online through their website) and half price deals for events with an annual pass, and a 'kids go free' online offer during the summer. Visitor numbers are slightly down in 2016, with limited marketing investment in 2015 as the Trust delivered the major 'Command of the Oceans' project. The Trust emphasised the importance of researching options, the importance of income yield (i.e. total income from admissions) over visitor volume, and the need for clear and honest messages and communications.

Ely Museum, an independent local history museum, raised prices in 2015 after looking at comparable museums in Cambridgeshire, and finding that they were significantly cheaper. Whilst visitor numbers have dropped modestly as a result, the Museum discontinued a joint ticketing arrangement it had with Oliver Cromwell's House, also in Ely, at the same time, and the Museum felt that the drop in visitor numbers were as a result of the end of this arrangement, as sales on the front desk are stable. Ely Museum had no complaints about the price rise, but do get criticism from the occasional visitor about not being free because they are a civic, place-based charging museum.

London Transport Museum raised its prices annually since 2010 as its core grant from Transport for London has reduced, with a standard annual adult ticket being £17, along with concessions and free entry for those aged 17 and under. To date price rises have not had a noticeable impact of visitor numbers, which have risen steadily over this period, with the Museum closely monitoring visitor diversity and competing with both national museums and more expensive paid attractions in its immediate vicinity. The number of repeat visitors has increased from 15% in 2010/11 up to 18% in 2015/16, indicating that an increasing number of visitors are prepared to pay a higher price in return for the opportunity to visit on more than one occasion.

Russell-Cotes Art Gallery and Museum have charged during the summer (April-October) for several years, and introduced charging for winter months from January 2016. Russell-Cotes found that standardising charging across the year meant that front line staff are better able to communicate and sell the museum to visitors – it is much less confusing. Russell-Cotes were expecting a 20% drop in numbers, but were pleased to report that there had been no change, although a few years of data will be needed to fully understand the impact. In terms of lessons, Russell-Cotes felt that a reasonable lead in time is necessary to get systems and staffing right, along with certainty about timescales (i.e. fixing the date of any planned changes).

Ruthin Gaol and Nant Clwyd Y Dre in Ruthin are operated and managed by Denbighshire County Council. The venues have always charged, with a price rise of 20% this year along with new saver tickets where a ticket to the Gaol gets a 20% discount at Nant Clwyd Y Dre and vice versa. The recent price rise has not impacted on either visitor numbers (which have slightly increased) or type of visitors. Ruthin Gaol and Nant Clwyd Y Dre found that good communications, providing good value for money and exceeding visitor expectations are essential in managing any changes in charging. For example, placing a sign outside clearly stating that you charge, how much, and whether there are any concessions or passes available, as is working hard to ensure that your staff are proud of your museum, and are therefore good advocates and sales people.

Tenby Museum and Art Gallery amended their admissions charging policy in recent years (letting children go free, removing the concessionary rate, and increasing adult prices). These changes were intended to increase the museum's appeal to families and children, as well as improve the museum's financial position. Since the changes, total visitor numbers have increased slightly, and the number of paying visitors has also been sustained. The changes also led to a far simplified pricing strategy for the museum, which has been of benefit to both museum staff/volunteers and also visitors as it is easier to understand and communicate. Tenby Museum emphasised the importance of effective communication with both visitors and all other stakeholders when implementing any changes around admission pricing – including strong and effective messaging about the financial position of the museum.

Tullie House Museum and Art Gallery increased the level and scope of charging in 2014, opting to charge for all special exhibitions rather than just some, and also creating a separate charge just for these exhibitions – where an all-inclusive rate was the previous offer. The changes led to a more consistent pricing strategy, and did not affect visitor numbers, which remained fairly constant, nor did it affect the mix of visitors. Any fluctuations that did occur are not regarded as being due to the change in admissions policy. Income from admissions did increase, with other income (donations and secondary spend) remaining constant or increasing due to other factors. Tullie House has operated a Tullie Card scheme for a long time, providing, at different points, free or reduced price entry for local people. The scheme has always provided excellent value for money for local people, but the changing funding and economic climate led to the cost of joining the scheme being increased, and there has been no negative reaction at all thus far. Concerns from stakeholders about changes to the scheme impacting on accessibility and the mix of visitors were unfounded given the profile of scheme card holders compared to the wider socio-economic and demographic mix of local people.

5. LESSONS LEARNED AND ISSUES TO CONSIDER AROUND CHARGING (OR NOT CHARGING) FOR ADMISSIONS

Overview

5.1 Overall, there is very much a 'mixed economy' in terms of charging for admissions – and the context within which a museum finds itself is key to this.

5.2 It is clear that there is no 'one size fits all' when it comes to considerations around charging – with the case studies and survey results providing examples of varying types and levels of impact from the same charging and pricing strategies – depending on the **context** (e.g. the wider environment within which the museum operates), the **characteristics** (of the museum - including the museum's aims/vision), the **collection** (e.g. the profile, esteem and draw of the collection), the profile of **customers** (e.g. understanding who the visitors are), effective **communication** (both internally and externally), and organisational **culture** (e.g. ensuring staff and volunteers understand and 'buy into' the approach to charging/not charging – providing training where required).

5.3 The museums that have faced the greatest challenges are those that have moved from free to charging – with the perceptions and attitudes of visitors (notably local visitors) proving to be a notable challenge. Those museums that already charge and increase their scale/scope of pricing do not report the same impacts or challenges.

Lessons and Issues to Consider

5.4 Separate guidance for museums setting out the key lessons and considerations has been produced. In summary, some of the key lessons for museums that have emerged include:

- The importance of understanding your offer and understanding your audience in considerations around whether or not to charge and what to charge
- The role of public opinion and perceptions needs to be recognised – moving past this using effective communication is challenging but important. Not charging can be attractive to visitors (especially local), whilst moving from free to charging can be particularly challenging. Public perceptions around museums being free do still persist.
- For museums that charge, the diversity/flexibility of pricing strategy can be important – e.g. discounts for particular visitors, open days etc. can help to counteract any concerns around accessibility.
- Museums note that it is important to balance the considerations about keeping prices down (to help accessibility) whilst not undervaluing the offer (by creating perceptions of low quality).
- Related to this, museums emphasise the importance of providing value for money when introducing or changing charging. This does not mean low prices, but ensuring pricing reflects the quality of the museum/offer and that this message – of the quality and value of the visit - reaches visitors.
- Whilst going low on price when introducing charging can appear appealing, museums that introduce an admission charge note that the barrier and challenge around this occurs irrespective of the price charged – so keeping the

price low does not reduce this challenge, and can cause issues around perceptions of low price equating = low quality as well as concerns that income from admissions charging may not be sufficient to cover the operational cost and/or provide a sufficient return.

- Providing free admission can offer opportunities, but museums need to be well organised and prepared to positively exploit other income generation opportunities from this (e.g. donations, secondary spend) or such opportunities can be missed.

- Communication and messaging is key[16] – including communicating the need to/reasons for change. This includes external communication – publicising charges and offers clearly; internal communication – communicating with staff about why changes/charges are being made; and communication with stakeholders – especially where they have a decision-making role/influence on the charging position.

- Make sure that relevant comparisons are used when considering charging/pricing – comparing with relevant (i.e. local rather than national) attractions is important, especially where museum visitors are typically local/day visitors.

- It is important to provide training and support for staff on any changes around charging, and also to appreciate the operational cost of introducing charging (e.g. staff training, new equipment, new systems).

- Ensuring that there is a sufficient lead-in time to implement any changes is important.

- Where possible, base any decisions around changing strategy and/or changing price on good evidence/data about visitors. Good data and user research is very important in informing decisions about charging.

- Some museums report a loss of front of house interaction with visitors when going free – resulting in less engagement (and less data about visitors). Charging can typically mean museums have the potential to better understand their visitors – through more front of house engagement, visitor feedback, and visitor data.

[16] Bailey et al (1997) strongly emphasise this, highlighting the importance of carefully managing in public relations terms, any introduction of admission charges.

ANNEX 1: LIST OF MUSEUM CASE STUDIES

Name	Key Consultees
Birmingham Museums Trust	Rachel Cockett Alex Nicholson-Evans
Brighton Museum and Art Gallery	Janita Bagshawe Sarah Posey Abigail Thomas
Bristol Museums	Laura Pye Zak Mensah
Caldicot Castle	Michael Booth
Cannon Hall	Lynn Dunning
Ceredigion Museum	Carrie Canham
The Historic Dockyard, Chatham	Bill Ferris Gail James
Cyfarthfa Castle Museum and Art Gallery	Kelly Powell Christopher Parry Ben Price Wendy Groves
Derby Museums	Tony Butler
Elgin Museum	Bill Dalgarno Ritchie Mabon
Ely Museum	Sara Brown
The Lightbox	Marilyn Scott
London Transport Museum	Claire Williamson
Petersfield Museum	Kathrin Pieren
Royal Cornwall Museum	Ian Wall
Russell-Cotes Art Gallery and Museum	Sarah Newman Beth Steiner
Ruthin Gaol/ Nantclwyd Y Dre/ Plas Newydd	Samantha Williams Emma Bunbury
Tenby Museum and Art Gallery	Mark Lewis Kathy Talbot Michael Williams Mike Brew John Ross Neil Westerman
Tullie House Museum & Art Gallery	Andrew Mackay
York Art Gallery	Michael Woodward

ANNEX 2: LIST OF CONSULTEES

Name	Role	Organisation
Tamalie Newbery	Executive Director	AIM (Association of Independent Museums)
Kevin Mason	AIM Council Member (& Director, Bodelwyddan Castle Trust)	AIM (Wales Rep)
Janice Lane	Director of Learning, Exhibitions and New Media	Amgueddfa Cymru (National Museums Wales)
David Anderson	Director General	Amgueddfa Cymru (National Museums Wales)
John Orna-Ornstein	Director, Museums	Arts Council England
Fiona Talbott	Head of Museums, Libraries and Archives	Heritage Lottery Fund
Sharon Heal	Director	Museums Association
Alison Turnbull	Head of Research	Museums Galleries Scotland
Loretta Mordi	Collections & Engagement Manager	Museums Galleries Scotland
Jenny Youngson	Quality Assurance Manager	Museums Galleries Scotland
Suzie Tucker	Head of Strategy and Communications	National Museums Directors' Council
Katie Childs	Policy and Projects Manager	National Museums Directors' Council
Elizabeth Green	Curator and Conservation Lead	National Trust Wales
Chris Bailey	Director	Northern Ireland Museums Council
Paul Smith	Director, Oxford University Museum of Natural History	University Museums Group
Lucy Shaw	Head of the Oxford University Museums Partnership	University Museums Group
Victoria Rogers	Secretary	Welsh Museum Federation
John Marjoram	Development Officer	Welsh Museum Federation

ANNEX 3: REFERENCES AND BIBLIOGRAPHY

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