



Exploring the Evidence: The Impact of Charging or Not for Admissions on Museums

Summary Report for Wales

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KEY OVERALL 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 local 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.

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1. INTRODUCTION AND CONTEXT

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 or not for admissions on museums.
- 1.2 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 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.
- 1.3 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 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.
- 1.4 With specific reference to Wales, a total of 53 survey responses were received, which accounts for around one-third of museums in Wales¹ and five Welsh case study visits were carried out².
- 1.5 This report is a Summary Report for Wales, which reflects on the findings of the research specific to Wales and the Welsh policy context (including Recommendation 8 of the Expert Review of Local Museums Provision in Wales 2015). As such, the report focuses on the results for Wales from the survey and the case studies, as well as reflecting the specific Welsh context, including feedback from stakeholder consultations carried out in Wales.

Museum Sector in Wales – Context and Overview

Spotlight on Museums 2015

- 1.6 In 2015 Museums, Archives and Libraries Division of the Welsh Government completed its fourth survey of the museums sector in Wales. The report provides an overview of the state of the museums sector in Wales exploring standards of practice, collections, visitor patterns, and funding and income. Spotlight also

¹ According to Spotlight on Museums 2015 there are approximately 160 museums in Wales, therefore the 53 responses account for around one-third of potential respondents. National Museums across the UK, including Amgueddfa Cymru, were not included in the survey but Amgueddfa Cymru was interviewed as a consultee for this report.

² The five Welsh case study museums were: Caldicot Castle, Ceredigion Museum, Cyfarthfa Castle Museum and Art Gallery, Ruthin Gaol and Nant Clwyd Y Dre, and Tenby Museum and Art Gallery.

explores the variances between the different types of museums in Wales, including national museums (Amgueddfa Cymru), local museums, Local Authority museums, independent museums, etc.³

1.7 Spotlight 2015 set out the following key findings on the basis of the research:

- In terms of visiting museums, Spotlight reports that there were just over 3.75 million total visits to museums in Wales in 2013, with around the same number of visits in 2014. Over the period covered by Spotlight (2011-2014) visits have fallen by around 3.3%, however there was a 1.3% rise in visits to local museums. 21% of visits to museums were made by children under 16.
- In terms of learning activities for 2013/14, 9,178 sessions and activities were delivered on-site, with 500,586 participants, and a further 2,419 delivered off-site, with 124,992 participants.
- Spotlight found that the economic impact of total visits to museums in Wales was close to £83 million.
- Spotlight also carried out research into collections in Wales. It previously found (2011 figures) that there were 5.5 million items held in Welsh museums. Levels of collections care and management⁴ remain high, though the report draws attention to current, and potential future issues around storage.
- The Welsh museums workforce is comprised of around 3,500 individuals, around two-thirds of whom are volunteers, a slight rise on 2011, leaving 1,196 paid staff within the sector. Spotlight also found that 10 Accredited Museums were entirely volunteer run.
- Other findings about museum provision highlighted that: budgets were falling (1% decrease between 2011/12 and 2013/14), and that public subsidy was on the whole, static or also falling. Around half of museums in Wales provided free admission.

Expert Review of Local Museum Provision in Wales 2015

1.8 In October 2014, the Welsh Government commissioned an Expert Review of Local Museum Provision in Wales⁵ against a background of reductions in funding, and proposed reorganisation and reform of local government. The Expert Review sought to review changes to local museum provision on the part of local authorities, and to set out future service delivery models which are sustainable and maximise opportunities.

1.9 The Expert Review highlighted some of the following key findings:

- Total visits to museums of 4.27⁶ million visits for 2013 (representing a growth of around 7% since 2009).
- Generally local museums in Wales attract low visitor numbers on an individual basis, with most local authority museums attracting fewer than 10,400 visitors per year.
- In terms of visitor demographics, the Review indicates that the majority of visits to museums in Wales are made by Welsh residents, most of whom are

³ Newman, T & SWMDP (2015), 'Spotlight on Museums 2015', *Welsh Government*

⁴ Environmental monitoring, environmental control, storage and housekeeping, display and housekeeping, and documentation.

⁵ Edwards H., (Chair), et al. (2014), 'Expert Review of Local Museum Provision in Wales 2015', *Welsh Government*

⁶ 2013 figures were not available from Spotlight at the time of the Review. This figure is therefore based on different datasets which are explained in the Review report, paragraph 53.

female, from older age brackets, and who sit within the ABC1 socio-economic groups.

- The Expert Review also sets out the charging picture in Wales, breaking down the sector into three distinct groups: Amgueddfa Cymru, where admission has been free since 2001; independent museums, amongst which a high proportion carry charges for admission; and local authority museums, of which around a third charge for admission.

1.10 The Expert Review describes the charging dynamics in Wales as “confusing for the public,” and makes the recommendation (see point 8 in the following list) for a review of current practices across the sector.

1.11 On the back of the Review’s findings, a number of recommendations were made, which were:

1. To create three Regional Bodies to provide operational direction, management and support to locally delivered museums.
2. To establish a national Museums Council to provide collective leadership and national-level activity coordination.
3. To develop a Museums Charter to set expectations for public museums in Wales.
4. For Local Authorities to consider all options, in consultation with Welsh Government, when reviewing museums services.
5. To seek to establish Collections Wales, to rationalise, develop and safeguard collections of significance.
6. For various bodies to collaborate to identify and provide skills development for the sector’s workforce.
7. To establish a transformation fund, to facilitate major changes required.
8. To review the policy and practice of charging for museum entry, and provide guidance.
9. To provide NNDR (National Non-Domestic Rates) relief for local authority provided museums.
10. For Welsh Ministers to be formally responsible for supporting and developing all public museums in Wales.

Well-being of Future Generations (Wales) Act 2015

1.12 A consideration around charging for admissions by museums highlighted both by stakeholders in Wales and museums in Wales through the survey and case studies was the influence and consideration of government policy around poverty, social inclusion and well-being - and the responsibilities of public bodies (including museums) in this regard.

1.13 This is exemplified by the Well-being of Future Generations (Wales) Act 2015, which sets out a number of responsibilities for public bodies in Wales, with regard to peoples’ well-being.

1.14 The Act sought to do a number of things, including⁷:

⁷ Well-being of Future Generations (Wales) Act, 2015 (anaw 2)
http://www.legislation.gov.uk/anaw/2015/2/pdfs/anaw_20150002_en.pdf

- Defining and establishing requirements for public bodies, around “sustainable development”.
 - Explaining well-being goals, and establishing requirements of bodies around setting well-being objectives, and how these contribute to achieving the goals, in accordance with sustainable development principles.
 - Setting out requirements around indicators for measuring performance, reporting on future trends, and annual progress reporting.
 - Requiring the Auditor General to examine the above.
- 1.15 The Act also established the office of Future Generations Commissioner for Wales, as well as public services boards for each local authority in Wales.
- 1.16 Under the Act, Public Bodies, which include organisations such as local authorities, Arts Council Wales, and Amgueddfa Cymru, are required to “think more about the long term, work better with people and communities and each other, look to prevent problems and take a more joined-up approach.”⁸
- 1.17 It is this responsibility that has led to some reflection around considerations for museums about charging for admissions – with some individual museums reflecting that this policy position is likely to reduce the possibility of introducing admission charges for some museums.
- 1.18 The findings set out in this report will hopefully help public bodies (i.e. local authorities) responsible for museums understand the impact of charging or not charging for admissions to museums, and use such evidence to inform future considerations about charging for admissions.

⁸ Welsh Assembly Government (2015), Well-being of Future Generations (Wales) Act 2015: The Essentials, <http://gov.wales/docs/dsjlg/publications/150623-guide-to-the-fg-act-en.pdf>

2. OVERVIEW OF THE CURRENT ADMISSION CHARGING LANDSCAPE FOR MUSEUMS

- 2.1 The pattern and profile of survey respondents for the overall research shows that the survey is generally representative of the wider UK museums sector in terms of museum type, geography and museum size. The pattern of survey respondents reflects the fact that the research was commissioned by AIM - resulting in a slightly higher proportion of responses from independent museums; and that MALD, resulting in specific additional efforts being made by the research team to achieve a good response level from Welsh museums.
- 2.2 In total, 53 replies to the survey were received from museums in Wales, and (based on the estimate from Spotlight on Museums 2015 of approximately 160 museums in Wales), this equates to a response rate of around one-third (33%) in Wales – higher than the overall response rate across the UK.
- 2.3 It is important to emphasise that the overall findings from the survey at the UK level 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 at the UK level in the survey results.
- 2.4 For Wales, this suggests that findings about the issues and impacts around charging or not charging for admissions on museums are generally similar for Wales as they are for museums across the UK. This is explored in more detail later in this report.
- 2.5 The pattern of museums in Wales, by type, that responded to the survey is summarised in Table 2.1 below, and shows that the majority of respondents are independent museums, with around 30% of respondents being local authority museums. This pattern differs from the Spotlight 2015 data which found that 40% of respondents were local authority museums and 34% were independent. The results presented in this report separate out the analysis by type of museum where relevant to help control for this.

Table 2.1: Type of museum

	Percent	Count
Independent	58.5%	31
Local Authority	28.3%	15
University	3.8%	2
Other (please specify)	9.4%	5

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 53

- 2.6 In terms of the current charging position for museums in Wales, 40% of museums charge for general admissions only; 2% charge for specific exhibitions only; 15% charge for both; 43% do not charge at all for admissions. 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. This overall pattern for Wales is the same as that for museums across the UK.
- 2.7 Assessing the charging position by type of museum (Table 2.2) shows that independent museums more commonly charge than local authority museums. These findings support the findings of the Expert Review of Local Museum

Provision in Wales 2015 set out in Section 1 about the scale of charging by type of museum.

Table 2.2: Type of Museum/Charging and Admission Policy

	Charge	Do not Charge	Grand Total
Independent	21	10	31
	68%	32%	
Local Authority	5	10	15
	33%	67%	
University	0	2	2
	0%	100%	
Other	4	1	5
	80%	20%	
Grand Total	30	23	53
	57%	43%	

Source: DC Research, Assessing the Impact of Charging for Admissions Survey of Museums, n = 53

- 2.8 More than two-thirds of independent museums in Wales charge for admissions, whilst one-third of local authority museums in Wales charge for admissions. This finding strongly mirrors the findings across the UK where 63% of independent, and just under 37% of local authorities indicate that they charge for general admissions and/or for specific exhibitions.
- 2.9 In terms of changing context around charging, 29% of museums in Wales that responded to the survey stated that they had changed their charging/pricing policy in the last three years. The vast majority of these museums were independent museums. Those that already charge in some way for admissions are far more likely to have changed their charging position (43%) than those that do not charge (9%).
- 2.10 The most common type of change was an increase in charging, i.e. increase in price and/or increase in scope/range of people being charged, with a small number of respondents reporting that they had moved from free admissions to charging for admissions, and the same number reporting a change from charging to free admissions.
- 2.11 For museums that are currently free admission, whilst some have given consideration to introducing charges, more than 70%, report that they have not thought about introducing charging for admissions. Not surprisingly, when asked how likely it is that they will start charging, the overwhelming majority report that it is not very likely or not at all likely, with the same pattern emerging when considering the next 12 months or the next three years.
- 2.12 For museums that currently charge for admissions, considerations around changing their charges is, unsurprisingly, more common in this group, with a fairly even split between those that have considered changing admissions/pricing and those that have not. The likelihood of changing charging is also more common, with around one-quarter stating that they expect to change their charging in the next 12 months, and the same proportion expecting to do so in the next three years.

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

Characteristics of Charging/Non-Charging Museums

- 3.1 As set out earlier in this report, the overall pattern for Wales shows 57% of museums charging in some form for admissions, and 43% not charging for general admissions or specific exhibitions – a pattern that occurs across the UK.
- 3.2 By type of museum, the survey found that more than two-thirds of independent museums in Wales charge for admissions, whilst one-third of local authority museums in Wales charge for admissions. These findings exemplify the mixed picture around charging for admissions, and challenging the preconception that independent museums charge and local authority museums are free-entry.
- 3.3 Apart from university museums, which are almost all free entry⁹, 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, such as being located in an area where there is a significant visitor economy, being a key attraction in the area, or being in an area where there is high competition to attract visitors.
 - In areas where museums describe the visitor economy as 'key', more museums are likely to charge for admissions (65%) than museums in areas where the visitor economy is described as 'significant' (50%) or 'moderate' (60%).
 - 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 (75%) compared to one of a number of significant attractions (58%); moderately significant attraction (62%); or attraction of minor significance (25%).
 - Assessing the level of competition for attracting visitors in relation to charging shows that those museums in 'very' or 'moderately' competitive areas are more likely to charge (64% and 60% respectively) than those in 'slightly' (50%) competitive areas.

Experiences of Charging/Non-Charging

- 3.4 As noted in Section 2, the majority of museums have not changed their charging position in recent years, but 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 the key aims of the research.
- 3.5 Those museums that do not charge report positively on the impact of free admission on visitor numbers - 78% 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.
- 3.6 Conversely, those that do currently charge for admissions present a more mixed picture – with around one-third stating it has no impact on visitor numbers (31%)

⁹ All university museums in Wales that responded to the survey stated that they are free entry – a very small minority elsewhere in the UK stated that they charge for admissions.

the same proportion reporting a negative impact (31%), and almost one-fifth reporting positive impacts (19%).

- 3.7 In terms of the mix and diversity of visitors, whilst 55% of museums that do not charge for admissions feel that this has a positive or very positive impact on the mix of visitors, 50% of those that do charge report that charges have no impact on the mix or diversity of visitors.
- 3.8 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. The concern about the impact of charging on local people is supported by AIM Visitor Verdict data¹⁰ which shows local visitors (i.e. from same county) accounting for a higher proportion of visitors to free admission sites (44%), than paid admission (26%).
- 3.9 The UK-wide research findings suggest 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.
- 3.10 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. 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. National Survey for Wales¹¹).
- 3.11 Findings in relation to some socio-economic indicators within the National Survey for Wales aligned with findings highlighted in the Expert Review of Local Museum Provision in Wales 2015 in Section 1 of this report, as well as with UK-wide data from AIM Visitor Verdict and other sources (e.g. Taking Part Survey for England).
- 3.12 The National Survey for Wales showed that attendance at museums amongst those surveyed who had a qualification level of 4 or above was 52%, as compared with 22% for those with no qualification and 32% amongst those who held a level 1 equivalent qualification.
- 3.13 Furthermore, when looking at attendance at museums in relation to the Wales Index of Multiple Deprivation (WIMD), for those residing in areas within the least deprived quintile 43% had visited a museum or museum event, whilst for those residing in the most deprived quintile, 34% had visited a museum or museum event. It should be noted that these fall within the context of an overall visiting rate in Wales of 39% of those surveyed indicating that they had visited a museum or museum event in the previous 12 months.
- 3.14 One of the significant findings of the National Survey for Wales is in relation to barriers to entry to museums for Welsh residents. The survey asked respondents to indicate the reason(s) why they did not visit a museum, and found that the cost of visiting was one of the lowest given reasons, with just 3% expressing this as a reason for not visiting. The most common reasons were a lack of interest

¹⁰ 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/>

¹¹ Statistics for Wales (2016), National Survey for Wales, 2014-15: Arts, museums and historic places, Welsh Government, <https://statswales.gov.wales/Catalogue/National-Survey-for-Wales/2014-15>

(31%) and difficulty in finding the time to visit (30%). A further 19% indicated that it had never occurred to them to visit a museum in any case. Whilst these findings suggest that cost, including, but not exclusively, the cost of admission, is not a common reason for not visiting, what is not clear is the extent to which cost could become a barrier if the other reasons, (lack of interest and difficulty in finding the time to visit were to be addressed.

- 3.15 There are of course museums that are the exception to this pattern around social mix of visitors – 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, and this broad pattern needs to be acknowledged.
- 3.16 Not surprisingly, the 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.
- 3.17 The majority of museums in Wales that are free admission report that this has a positive or very positive impact on spontaneous donations, although many museums, both free admissions and those that charge, report that other factors rather than the charging position have a greater influence on the level of donations received – most notably the overall strategy and approach of the museum to pro-actively seek donations or not.
- 3.18 Some wider, but not Wales specific, 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, or used on site catering, than those to free admission sites. Interestingly, however, the survey showed that around 40% free-entry museums believe being free has a positive impact on secondary spend, with a similar proportion of museums that charge believing so. One of the more frequent positive impacts reported by free museums is an overall increase in visitors leading to an increase in sales.
- 3.19 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 offer, including retail and on-site catering.
- 3.20 The overall UK wide research shows that museums which charge admission have longer dwell times than those that are free entry, and this pattern is repeated in Wales – with more than 40% of charging museums reporting longer dwell times, compared to one-quarter of free museums. This was also evidenced by data from AIM Visitor Verdict. AIM Visitor Verdict showed free entry museums have higher rates of repeat visits (39%) compared to those that charge for admission (31%).
- 3.21 At the UK level, 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.
- 3.22 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 - more than 70% of museums in Wales that do not charge report this. 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 or need to charge for admissions, 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.

Impact of Changing from Free to Charging

- 3.23 As noted earlier, the number of museums that have changed their position, either from free to charging or from charging to free, is relatively small – this is true within Wales and more widely across the UK. 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.
- 3.24 In terms of the move from free to charging, the conclusions below are drawn from the UK-wide evidence, supported by the specific survey responses from museums in Wales and the case studies of museums in Wales.

IMPACT OF MOVING FROM FREE TO CHARGING

- 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.
- Museums that have moved from free to charging typically report that this has had no impact on the mix and diversity of visitors, although data on social mix can be limited for some museums, especially when they were free.
- 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.
- Spontaneous donations commonly decreased when moving from free to charging, although such decreases are more than compensated for by increases in admissions income. Many museums report that factors other than charging have a greater influence on donations.
- 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.
- 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.
- 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.

- 3.25 An example of a museum that has moved from free to charging in recent years, the case study of Cyfarthfa Castle Museum and Art Gallery set out below, exemplifies some of these impacts.

CASE STUDY EXAMPLE: IMPACT OF MOVING FROM FREE TO CHARGING

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.

Impact of Changing from Charging to Free

- 3.26 As noted earlier, the number of museums that have changed their position, from free to charging or 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.
- 3.27 In terms of the move from charging to free admissions, the conclusions below are drawn from the UK-wide evidence, supported by the specific survey responses from museums in Wales and the case studies of museums in Wales.

IMPACT OF MOVING FROM CHARGING TO FREE

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

- Museums moving from charging to free reported positive impacts on relationships and reputation with stakeholders, local community, 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.

3.28 Two examples of museums that have moved from charging to free in recent years, the case studies of Caldicot Castle and also Ceredigion Museum set out below, exemplify some of these impacts.

CASE STUDY EXAMPLE: 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.

CASE STUDY EXAMPLE: IMPACT OF MOVING FROM CHARGING TO FREE

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.

4. CHARGING FOR ADMISSIONS – APPROACHES, PRICING AND IMPACT

- 4.1 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. Within these types some museums offer flexibility – e.g. age-related charges for children; recognition of the different sizes/types of family and provide ticketing to match.
- 4.2 Beyond this, other 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, etc.
- 4.3 Other pricing innovations include discounts for online ticket purchasing; discounts with particular offers/voucher schemes; reduced rates on certain days/times of the week.
- 4.4 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 for their systems, for staff/volunteers, and for visitors.
- 4.5 The survey found that around one-quarter of museums in Wales operate a Gift Aid scheme for admissions, with more than twice as many using the additional 10% scheme compared to the annual pass scheme. Of the remainder almost one-third state they are not eligible for Gift Aid, with the remaining 44% stating that they do not operate a Gift Aid Scheme for admissions.
- 4.6 In terms of benchmarks for pricing, and wider factors that can influence the level of pricing, analysing average general admission adult prices against other factors found¹²:
- The current average price for an adult ticket for general admission is just over £5 with a notable range of prices underpinning this average – from less than £1 to £12. This average is lower than the UK wide result, which showed an average of just less than £6, and a wider range of prices at the upper end – exceeding £20. It is worth noting that there are no big regional or nationally styled museums in Wales of the type which typically charge more for admission in the rest of the UK.
 - The current average price for a child ticket for general admission is just over £2.50, and again the range of prices underpinning this average is notable – from free to £9. This average is lower than the UK wide result, which showed an average of almost £3, and a wider range of prices at the upper end – up to £14.
 - The current average price for a concession ticket for general admission is slightly above £4.50 with a notable range of prices underneath this average – from less than £1 to more than £11. This average is lower than the UK wide result, which showed an average of just over £5, and a wider range of prices at the upper end – exceeding £20.

¹² These results are specific to Wales, although it should be noted that this analysis is therefore based on responses from the 25 museums in Wales that responded to the survey that do charge for general admissions.

- The current average price for a standard family ticket for general admission is just over £15 and the range of prices underneath this average is from £4 to £36. This average is lower than the UK wide result, which showed an average of almost £19, and a wider range of prices at the upper end – exceeding £60.
- 4.7 In terms of average prices relative to other factors, analysing general admission adult prices against other factors found some patterns¹³:
- There is little difference between average prices by type of museum – whilst independent museums are more likely to charge than local authority museums, the average prices for those of both types that do charge is similar.
 - The more significant the visitor economy is to the local area, the lower the average price.
 - The more important the museum is as an attraction to the local area, the higher the average price it charges.
 - There is a pattern of higher average prices relative to the size of the museum (by visitor numbers) i.e. the larger the museum the higher the average price.

Impact of Changing/Increasing Pricing for Admissions

- 4.8 As noted earlier (Section 2), museums that have changed/increased their pricing for admissions is the most common type of change that has been made by museums – both in Wales and across the UK – in recent years.
- 4.9 In terms of the impact of increasing pricing – either through an increase in price and/or an increase in the scope/range of people being charged – the conclusions below are drawn from the UK-wide evidence, supported by the specific survey responses from museums in Wales and the case studies of museums in Wales.

IMPACT OF CHANGING/INCREASING PRICING FOR ADMISSIONS

- 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.
- 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.
- The vast majority of museums that increased pricing noted that this has had a positive impact on admissions income, of varying scales.
- Almost three-quarters of museums that increased pricing noted that it had no impact on spontaneous donations – pointing out that other factors were more important in terms of the level of donations.
- 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.

¹³ Given the relatively small number (25) of museums in Wales who responded to the survey that charge for admissions, there is insufficient data to analyse Welsh specific data by these various sub-categories, therefore these findings are based on the UK-wide results from the research.

- 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.
- Many museums use a change in the visitor offer, e.g. 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 – simply putting the price up without any change in the offer is more likely to result in negative impacts for a museum.

4.10 Two examples of museums that have changed their pricing in recent years, the case studies of Tenby Museum and Art Gallery and also Ruthin Gaol and Nant Clwyd Y Dre set out below, exemplify some of these impacts.

CASE STUDY EXAMPLE: IMPACT OF CHANGING PRICING

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.

CASE STUDY EXAMPLE: IMPACT OF CHANGING PRICING

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.

5. LESSONS LEARNED AND ISSUES TO CONSIDER

- 5.1 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; 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 and providing training where required.
- 5.2 The museums that have faced the greatest challenges are those that have moved from free to charging with the perceptions and attitudes of visitors, particularly local visitors, proving to be a notable factor. Whilst this a UK wide issue, it was specifically highlighted in Wales by a number of survey respondents, case studies and consultees. This is attributed to the dispersed nature of Amgueddfa Cymru sites across Wales and the influence this has on perceptions, attitudes and expectations of potential visitors about museums having free admission.
- 5.3 This issue is not about the free admissions policy for national museums, but is about the influence that free admissions to national museums can have on public opinion, perceptions and expectations - i.e. in reinforcing or creating assumptions by the public both that all museums are free, and also that they should be free. Addressing such perceptions through effective communication is important for museums that charge for admissions.
- 5.4 A separate guidance document for museums about successfully setting admissions policy and pricing has been produced. It is this guidance document along with this Summary Report for Wales (as well as the main research report) that will help to address Recommendation 8 from the Expert Review Expert Review of Local Museums Provision in Wales 2015, i.e. *'To review the policy and practice of charging for museum entry, and provide guidance'*.
- 5.5 In summary, some of the key lessons for museums that have emerged include:
- The importance of understanding the offer and the audiences 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, especially to local visitors, whilst moving from free to charging can be particularly challenging. Public perceptions around museums being free persist, including assumptions both that they have free admission and/or expectations that they should have free admission.
 - 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. Keeping the price low does not reduce this challenge, and can cause issues around perceptions of low price equating to low quality as well as concerns that income from admissions charging may not be sufficient to cover the operational cost of charging 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.
- Communication and messaging is key - including communicating the need to, and 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 or 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.

5.6 These lessons can be used to help museums create clear admissions policies. The process of creating such policies can involve stakeholders and help with the challenge of communication.