Research into Admissions Pricing Policy in Museums and its Impact

December 2023

Image credit: Keswick Museum
Charity Registration No. 1082215
Company Registration No. 1350939

Contents

Acknowledgements

DC Research and Durnin Research alongside the Steering Group representatives for this project (Association of Independent Museums (AIM) and partners Arts Council England (ACE), Museums Galleries Scotland (MGS), the Welsh Government, the National Museum Directors' Council (NMDC), and the Art Fund) would like to thank all those museums and individuals that contributed to this research study in various ways.

This includes those that responded to the survey, those that were consulted by the study team, and those that agreed to be a case study museum. In addition, thanks go to those that provided examples of previous research and evidence around charging for admissions, and those that commented on emerging findings from the research at various points (especially attendees at the AIM Annual Conference 2023).

Finally, 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 these contributions and the time given is very much appreciated.

Introduction

Image credit: Ironbridge Gorge Museum Trust

Introduction

1.1 Introduction and Aims

1.1 The Association of Independent Museums (AIM) and partners Arts Council England (ACE), Museums Galleries Scotland (MGS), the Welsh Government, the National Museum Directors' Council (NMDC), and the Art Fund commissioned DC Research Ltd working in partnership with Durnin Research Ltd to deliver **'Research into admissions pricing policy in museums and its impact'**.

1.2 The research explored admissions policies and pricing strategies in the UK museums sector and sought to assess the impact of charging (or not) for admissions as well as investigating different pricing strategies.

1.3 In particular, the research had two specified goals:

- To understand current and potential pricing strategies, models and benchmarks, and their high-level impact on museum audiences; and how museums can adapt charging to respond to the current environment and to be prepared for what may happen in the future.

- To create outputs museums can use to decide admissions strategies that maximise income from those able to pay, put the museum in the right pricing bracket in the market, and still offer pricing options that make it accessible and welcoming to all.

1.4 The first of these goals is addressed in this research report, the second goal is addressed in the separate guidance document that has been developed as part of the suite of publications produced as part of this research.

1.2 Approach and Key Tasks

1.5 The research, which was commissioned at the end of 2022, and completed in September 2023, involved the following:

- **Inception, Scoping and Progress.** An inception meeting, initial scoping discussions, and ongoing progress meetings throughout the research study were held between the study team and the Steering Group (which included representatives from AIM, ACE, MGS, the Welsh Government, NMDC, and the Art Fund).

- **Desk Research and Analysis.** This stage involved three strands of desk-based research and analysis: a literature review summary of relevant research and studies, data collation and analysis, and the development of the research instruments and survey tools for the research.

- **Survey of the Museum Sector.** A key strand of the research was the development and implementation of an online survey, open to all museums in the UK. The aim of the survey was to adopt a wide-ranging and comprehensive approach to help ensure that the research findings were robust and rigorous in terms of providing sufficient coverage of the museums sector, as well as ensuring that the research was inclusive and transparent in terms of the opportunity for museums to engage in it. The survey took place in February-March 2023 and was promoted via various routes, including support from Steering Group organisations as well as a wide range of other museum organisations and networks – all of which helped to engender a good response to the survey. Overall, the survey received more than 450 raw responses, and once the data was cleaned, a total of 344 valid replies were used in the analysis. This is an excellent response rate for a survey of this type, and consideration of the survey responses by geographic location and by museum type shows that a good mix of museums responded to the survey – more details about this are included in Annex 1 to this report.

- **Museum Consultations.** A range of consultations and discussions took place with a sample of museums, with the aim of complementing the survey and providing a deeper, more qualitative, and more nuanced understanding of the issues around admissions pricing policies for museums. The museums selected for these consultations were identified in conjunction with the Steering Group, and drew on a variety of sources, including the survey results, as well as examples identified in the literature review, and the knowledge of the Steering Group and study team. In total, 29 museums were consulted during this stage, and a list of the consultees is included in Annex 2 to this report, and shows that a good mix of consultees – in terms of museum type, museum size, geographic location, and current and recent admissions pricing policies – was achieved.
- **Case Study examples.** Drawing on these museum consultations, a range of case study examples have been developed to highlight particular findings and themes from the research. These vignettes are included in the main sections of this report, and are also included within the guidance document that has been produced as part of this research.

1.3 Report Structure

1.6 This document is the Final Report for the **'Research into admissions pricing policy in museums and its impact'** produced in October 2023, and is structured as follows:

- **Section 2** provides an **overview of the current and recent practices and strategies** around admissions charging for museums.
- **Section 3** looks at current admission prices for museums, and **presents a range of admission price benchmarks** for museums in the UK for key ticket types – both overall and disaggregated by museum characteristics and contextual factors.
- **Section 4** presents the findings from the research about the i**mpacts of different admissions charging strategies, and the impact on museums of changing the admissions pricing policy**. This focuses on the four most common changes – an increase in admission prices, introducing new types of tickets, moving from charging for admissions to free admissions, and moving from free admissions to charging for admissions.
- **Section 5** reflects on the research findings, and outlines some of the **key patterns** around admissions pricing strategies for museums, identifies some of the **emerging innovations** around admissions pricing, highlights some **examples of good practice**, and presents some **key lessons for museums** about admissions charging.
- **Annex 1** presents more information about the survey of the museums sector. This includes a summary of the survey process, the representativeness of the responses, and the survey findings for the categorical and quantitative survey questions.
- **Annex 2** lists and briefly describes the museums that were consulted as part of the Museum Consultations phase of the research.

Overview of Current Admission Charging

Image credit: Dickens House Lewis Bush Sept 2020

Overview Of Current Admission Charging For Museums

2.1 Introduction to Section 2

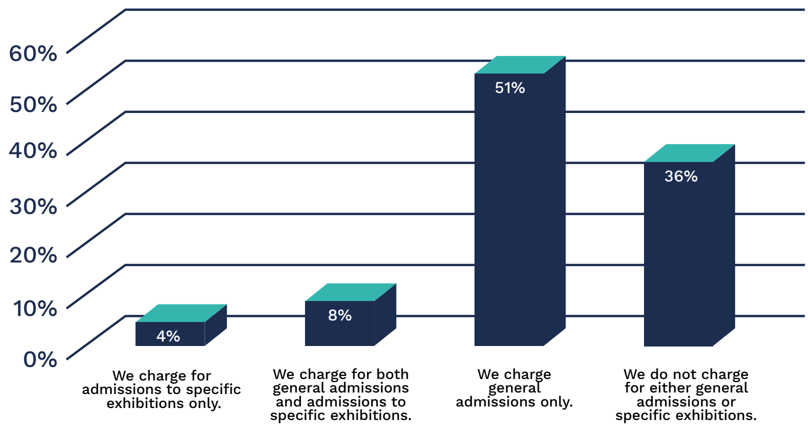
2.1 This section presents the findings of the research about the overall charging position of museums at the current time. It looks at the current scale of charging and non-charging within museums, assesses the charging position relative to key characteristics of museums, considers recent trends around changes to the admissions charging position of museums, as well as highlighting the issues and considerations that influence the admission charging strategies within museums.

2.2 Please note, the tables referred to throughout this section are included in Annex 1 to this report, and the charts included below are summary versions of the same results.

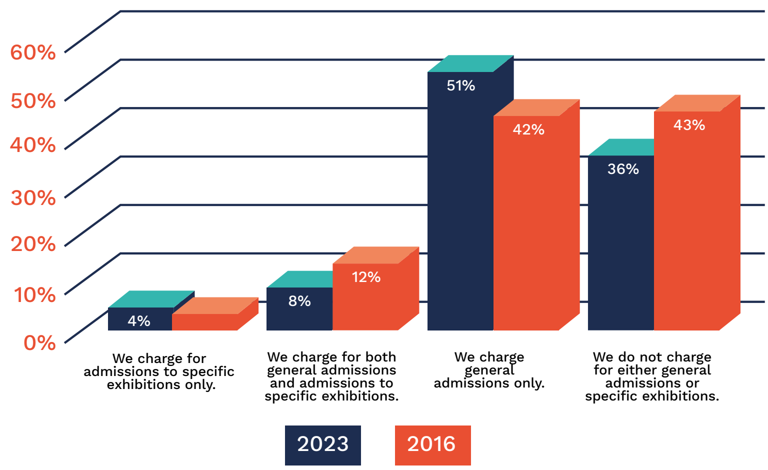
2.2 Current Charging Position of Museums

2.3 In terms of the overall charging position for museums, Table A1.3 shows that just over half (51%) of museums charge for general admissions. Conversely, more than one third (36%) do not charge at all. Just less than one in 10 (8%) charge for both general admissions and admissions to specific exhibitions, whilst 4% charge for admissions to specific exhibitions only.

2.4 Overall, this shows that 64% of museums charge for admissions in some form, whilst 36% of museums report that they do not charge at all for admissions.



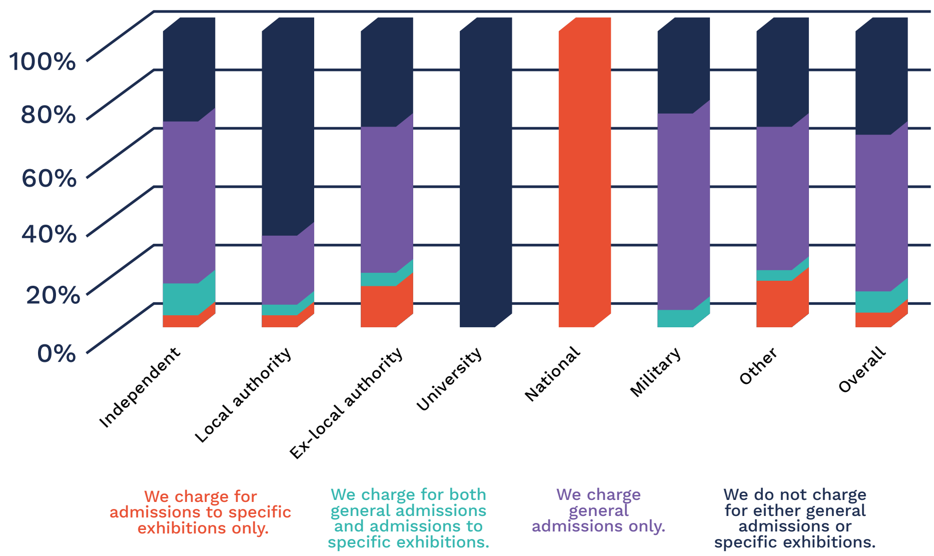
2.5 Comparing the situation with the previous 2016 research shows that a higher proportion of museums now charge for general admissions (51% in 2023 compared to 42% in 2016), and there has been a decrease in those that do not charge at all (from 43% to 36%). As well as a decrease in the proportion of those that charge for both general admissions and specific exhibitions (from 12% to 8%).



2.6 The results from this survey – which show overall that 64% of museums charge for general admissions and/or admissions to specific exhibitions, and that 36% of museums do not charge for either general admissions or specific exhibitions can be compared to other research findings on this. Such comparison reflects that the respondents to this survey are more representative of independent museums than other parts of the museum sector, with other sources reporting higher rates of museums that do not charge for admissions than has been found in this research. For example, both recent work for MGS[1] as well as the recently published Museum Spotlight Survey 2022[2] about museums in Wales report higher proportions of museums that do not charge for admissions, as does UK-wide data from the Art Fund specifically for Art Fund museums. For museums in England, data from the most recent Annual Museum Survey[3] found that 43% of museums do not charge for admissions or exhibitions, showing similar patterns to that found in this research.

2.7 The current admission charging position can also be considered by looking at various other museum characteristics, including museum type, museum location, core funding position, level of competition for attracting visitors, significance of visitor economy to local area, importance of museum to visitor economy of local area, museum size, scale of local visitors, and by dwell time.

2.8 Table A1.4 shows that, in terms of current admissions charging by type of museum, local authority museums are less likely to charge for admissions compared to independent museums or ex-local authority museums. 71% of local authority museums do not charge whilst just 33% of independent museums and ex-local authority museums do not charge at all.



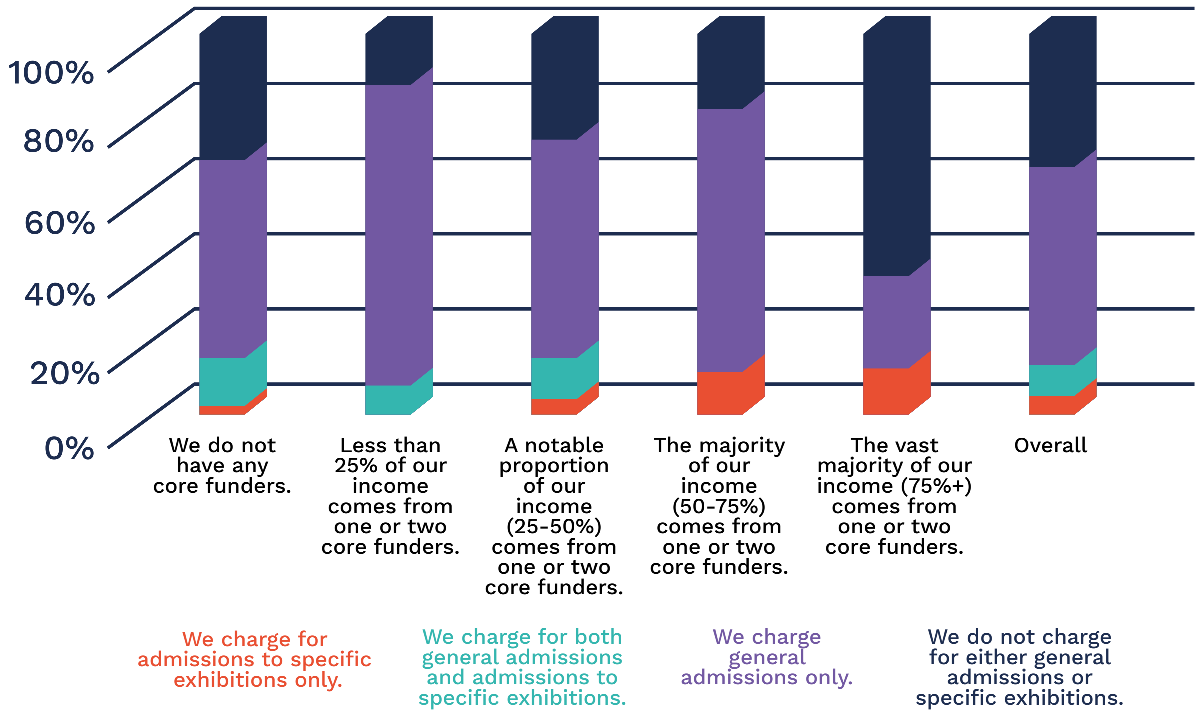
2.9 The results also show that university museums do not charge at all for entry, that National Museums charge for admissions to specific exhibitions only, and that military museums are more likely to charge for admissions compared to the overall average.

2.10 In terms of museum location, Table A1.5 shows that there are only slight variances by location in terms of the charging position of museums, museums in London and the South West of England are slightly more likely not to charge for admissions, whilst museums in the North are more likely to charge for general admissions compared to the average, as are museums in Wales.

[1] https://www.museumsgalleriesscotland.org.uk/wp-content/uploads/2023/02/Survey-of-Scotlands-Museums-and-Galleries-Final-Report-301122-CF.pdf
[2] https://www.gov.wales/sites/default/files/statistics-and-research/2023-09/museum-spotlight-survey-2022-364.pdf
[3] https://southwestmuseums.org.uk/annual-museum-survey-archive/

2.11 Looking at the current admissions pricing policy of museums in relation to the core funding position (see Table A1.6) shows, perhaps unsurprisingly, that those museums for whom core funders account for more than 75% of income are less likely to charge for admissions (64% of these museums do not charge compared to 36% overall). Museums that do not have any core funders reflect the overall position of all museums with 35% not charging for admissions compared to the overall average of 36%.

2.12 Those for whom core funding accounts for less than one-quarter of income are more likely to charge for admissions (86% charge for admissions in some form, compared to 64% overall). Interestingly, those for whom core funding accounts for between 25% and 50% of income and (to an even greater extent) between 50% and 75% of income are more likely to charge for admissions in some way. 72% of those for whom core funding accounts for between one-quarter and one-half of income report that they charge for admissions in some form compared to 64% overall), whilst 79% of those for whom core funding accounts for between one-half and three-quarters of income report that they charge for admissions in some form compared to 64% overall).

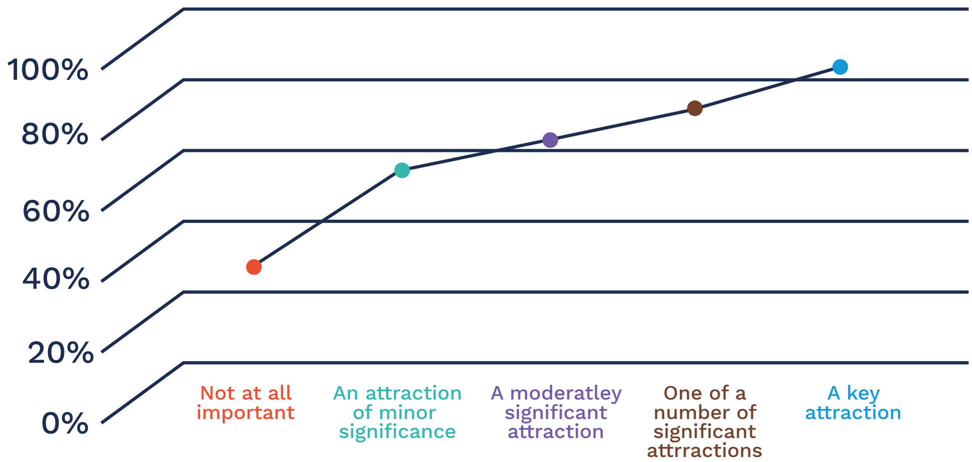


2.13 Looking at current admissions pricing policy relative to the self-reported level of competition for attracting visitors (Table A1.7) the survey results indicate that there is limited relationship between whether museums charge for admissions or not and the level of competition for attracting visitors.

2.14 On current admissions pricing policy relative to the reported significance of the visitor economy to the local area, some results are worth highlighting (see Table A1.8). Museums that report the visitor economy locally is ‘not at all significant’ are less likely charge for admissions (only 13% charge at all compared to the overall average of 64%). Conversely, museums that describe their local visitor economy as ‘a key sector’ or ‘one of a number of significant sectors’ are more likely to charge for admissions (73% and 72% respectively compared to the overall average of 64%).

2.15 A very clear relationship emerges when the self-reported importance of the museum to the local visitor economy is looked at as a characteristic around the current admissions pricing policy for museums. Table A1.9 shows that:

- For those who describe their museum as ‘not at all important’, only 27% charge for admissions in some form.
- For those who describe their museum as ‘an attraction of minor significance’, 55% charge for admissions in some form.
- For those who describe their museum as a ‘moderately significant attraction’, 62% charge for admissions in some form.
- For those who describe their museum as ‘one of number of significant attractions’, 72% charge for admissions in some form.
- For those who describe their museum as ‘a key attraction (i.e., a destination museum which draws people into the area)’, 81% charge for admissions in some form.



2.16 In terms of museum size, Table A1.10 shows that, compared to the average, smaller museums are slightly more likely not to charge compared to medium and larger museums. This finding, of a lack of clear relationship between museum size and propensity to charge is also confirmed by other sources – bespoke data from the Annual Museum Survey 2022[4] confirmed this finding.

2.17 Looking at the charging position relative to the type of visitor museums typically get (where museums were categorised based upon the proportion of their visitors that are local), Table A1.11 shows that museums where the proportion of local visitors account for more than 50% of the audience are less likely to charge for admissions (41% do not charge for admissions) compared to those where the proportion of local visitors is less than 50% of the audience (24% do not charge for admissions).

2.18 When the current admissions charging position is considered relative to typical dwell times of visitors (see Table A2.12), where more than 50% of visitors have a dwell time of less than 30 minutes, most of these museums (79%) do not charge. At the other end of the dwell time spectrum, those museums where more than 50% of visitors have a dwell time of more than 4 hours, all charge for admissions (100%).

[4] Bespoke data from the Annual Museum Survey 2022 (https://southwestmuseums.org.uk/annual-museum-survey-archive/) was provided to the study team for this research by South West Museum Development. Their support in providing this data to help inform this research is much appreciated.

2.19 Considering museums where more than 50% of visitors have a dwell time of between 2 and 4 hours, 86% charge for admissions, and museums for whom 50% of visitors have dwell times of between 30 minutes and 2 hours, 70% charge for admissions in some form. Overall, this shows that, typically, museums where dwell time of more than half of visitors is less than 30 minutes are far less likely to charge than those museums that report higher dwell times – and this is increasingly the case the higher the dwell time. However, the exact cause and effect on these factors cannot be deduced – it may be that free museums have lower dwell times (but potentially with higher frequencies of visits), rather than museums with lower dwell times choosing not to charge.

2.20 Museums were asked as part of the survey, and also through the museum consultation interviews, to outline the key factors that influenced their current charging position and prices.

2.21 Responding museums have made a range of changes to their approach to admissions. Many have implemented an **increase in admission charge**, with a range of increases for adult tickets from as little as 25p upwards, with most raising prices between 5% and 10%. Some increases were undertaken as part of business planning cycles, with other increases occurring in instances where there had not previously been a change in price for some time or following a significant change at the responding museum (such as a limited offer as a result of redevelopment or renovation).

2.22 A number of museums had put off raising prices during the pandemic, and others had reduced prices or gone free. After the pandemic, most either returned to the previous price point, or raised prices from 2022 onwards. For example, the Henry Moore Studios and Gardens could only offer partial opening of their site during the pandemic, so their ticket price was reduced during this period.

2.23 A small number decided not to reintroduce charging following the pandemic.

2.24 Several museums have undergone a process of admissions **simplification**, reducing the number of ticket types available. Some have removed family tickets, with typically children either going free or having reduced entry, although one has a single-entry charge and no distinction. Others have addressed a mix of charging and free to a venue or site-wide admission charge.

2.25 For example, Beamish Museum reflects on the changes that it has made to ticketing in recent years and has found that using fewer ticket types has been effective – *"the more streamlined the offer, the more visitor focused it is"*; *"we worked really hard to make it easy"*; and "*we still have work to do in this area, and are in the process of reviewing our admissions process – working towards making the most of the digital solutions on the market to give our visitors the smoothest possible entry into the museum*". Given the number of visitors that Beamish can get in one day, *"it needs to be simple"*.

2.26 In addition, Wordsworth Grasmere highlighted the importance of "keeping it simple" for staff and visitors when it comes to ticketing – especially family tickets. Emphasis was placed on providing value for money for families, whilst not making it complex in terms of ticketing.

2.27 Some museums have started **membership schemes** with standard entry and events being discounted. For example, Ironbridge Gorge Museum Trust have introduced a 'pass plus' annual ticket at higher price but with additional benefits (such as discount in retail and catering).

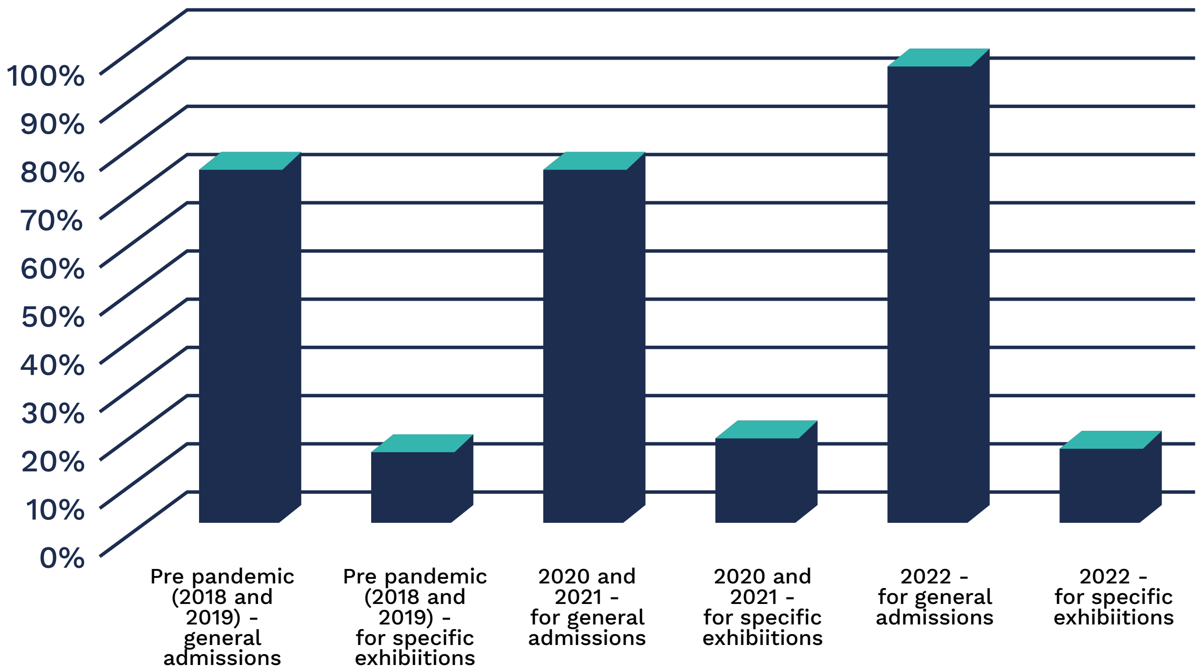
2.28 Museums that have recently undergone significant **redevelopment** often introduce charging, or increase prices, as a result. For example, Wordsworth Grasmere reopened in 2021 with a new, increased, pricing structure to reflect the increase in offer, balanced by discounted family tickets and a new adult 65+ concession. In contrast, the third-floor exhibition space at Derby's Museum of Making, launched and operated for two years as a chargeable exhibition space, reverted to free in 2023 as it was felt not to be sustainable, raising expectations and confusing visitors.

2.29 A number of museums who charge have **changed their approach**, for example introducing changes to family tickets or free entry for children, removing age related concessions, and introducing annual passes and Gift Aid tickets. Some who had previously charged for part of the visit (such as tours and exhibitions), have moved to site wide admissions charging.

2.30 The Charles Dickens Museum introduced a partnership-linked free entry, working with charities, partners and community groups to identify audience groups in need and offer targeted free entry. The National Civil War Centre in Newark have piloted both half price entry for residents, and free entry for residents, during school holiday periods.

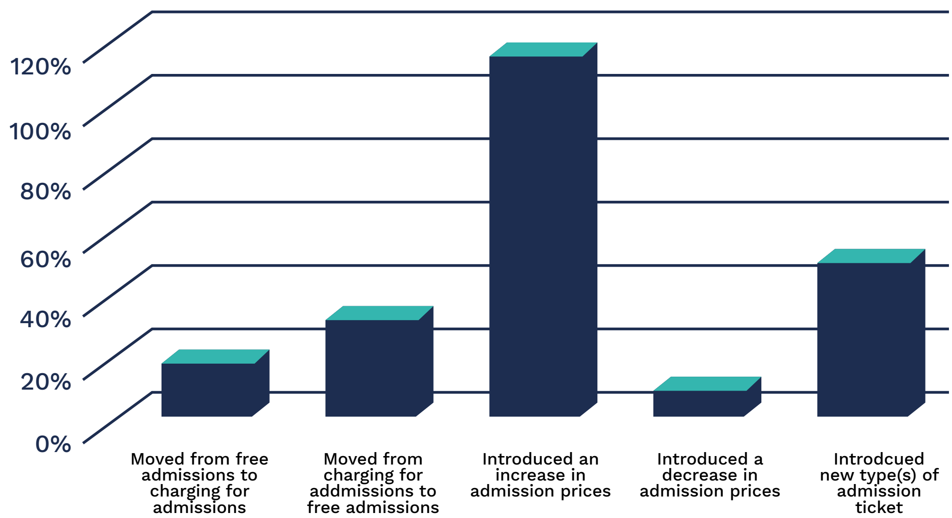
2.3 Changes to Museum Admission Charging Position in Recent Years

2.31 To consider any recent changes to museums admission pricing strategies, the survey asked respondents to indicate whether they had changed their admissions charging position in recent years. Table A1.13 shows that half of respondents (50%) report not making a change to their admissions charging position in any of the specified time periods (2018 and 2019, 2020 and 2021, or 2022). For those museums that had made a change, the most common change was around general admissions, this was most common in 2022 with 28% of respondents reporting such a change. It was also common in both 2020-2021 and also 2018-2019 where more than one-fifth of respondents reported making a change to their pricing position for general admissions (22% and 21% respectively).



2.32 For those museums that had made a change to their admissions charging position, by far the most common type of change was an increase in admission prices with 70% of respondents reporting this (see Table A1.14). The next most common change was the introduction of new types of admission ticket, with 30% of respondents having made this type of change. Only a small minority of respondents (5%) report introducing a decrease in their admission prices over this period.

2.33 In terms of more fundamental changes to their admissions charging position, 18% of respondents reported that they had moved from charging for admissions to free admissions during this period, whilst 11% report having moved from free admissions to charging for admissions.



2.34 Museums that reported that they had raised prices cited a range of factors that were underpinned by the need to raise income. The predominant reason for this is **rising costs**, as well as the need to make the museum more sustainable, although some linked this to pandemic recovery, needing to respond to a fall in revenue.

2.35 Those museums that changed their approach to charging explained this was driven by the need to **simplify ticketing**, to **increase visitors** (overall as well as targeting specific groups such as families and young people after the pandemic, and an improved offer as a result of redevelopment or refurbishment).

2.36 Charles Dickens Museum explained that their prices had been static for several years. Following a benchmarking process, the museum raised prices at the same time as offering ‘more for more’, building in an audio guide as a downloadable resource to keep.

2.37 Most responding museums that report moving from charging to free did so to increase visitors and maximise donations. For example, the Isle of Wight Glass Museum looked to encourage donations from visitors and increase footfall to the museum shop, and the Museum of Making in Derby found that charging for entry to its small exhibition space limited the scope to generate income from donations.

2.38 Those moving from free to charging cited sustainability as the main factor.

2.39 Many museums highlighted **benchmarking** and competitor analysis as an important part of the decision-making process across all the factors influencing change, with some highlighting the importance of this approach in balancing a need for income generation against fulfilment of overall purpose.

2.40 For example, Wordsworth Grasmere emphasised the importance of doing lots of benchmarking around pricing, especially following redevelopment to check how they compared with other relevant museums and visitor attractions – emphasising that benchmarking with other visitor attractions of different types that have similar dwell times was important, not just looking at museum comparators. Making sure non-museum benchmark comparators are relevant in terms of dwell time, audience type, quality of offer, and facilities is important.

2.41 Some museums highlighted formal reviews as being an important part of the decision-making process for changes to admissions, typically as part of an annual business planning cycle. Some examples include:

- Ironbridge Gorge Museum Trust explained that the decision to raise admission was made as part of the annual budget setting process to offset increasing costs whilst still recognising the importance of delivering value for money for visitors and competitor pricing.

- Beamish Museum emphasised the importance of reviewing pricing annually – but also that *"the values of the museum should inform every business decision you make"* – emphasising that decisions about admission strategy and pricing should not be made in isolation. Benchmarking is a "critical process" in setting admission prices for Beamish Museum – drawing on a range of relevant local and national comparators and looking at both the offer from such comparators and the price of the comparators is part of this process.

- Trimontium Museum benchmark with local organisations of similar size/location and relevant other comparators (other Roman sites in Trimontium's case), review income assessment and targets to balance making a visit affordable whilst being sustainable.

2.42 Some museums took a modelling approach to decision making. For example, The Heritage Centre Bellingham undertook financial analysis during a trial of a change of admissions policy to assess its impacts. The Centre emphasised the importance of doing a risk assessment around such a change in strategy, and implementing it for an initial trial period and evaluating the impact was an important part of the process.

2.43 In most cases, including those where there had been reviews and analysis, decisions on admissions policy was made by the governance processes in place in each museum. Typically, this would be by the board of trustees on recommendation from senior management.

2.44 For example:

- Black Country Living Museum reviewed admissions as part of budget-setting for the whole museum by the Leadership Team. Scrutiny was provided at Committee and Board based on a recommendation from the Chief Executive.

- West Highland Museum's Vice Chair explored options with the Curator Manager. The Board approved the decision to introduce charging for groups.

- At Yr Ysgwrn staff saw a need to increase prices, and presented a report to the board for approval.

- For any planned changes in admissions pricing at Live Borders Museums & Galleries emerging as part of the review of prices that takes place annually, these go through a process of the pricing schedule being reviewed by the head of service, partners being consulted on proposed changes, before final approval by Live Borders trustees/Scottish Borders Council.

2.45 Those museums that reported they had not made a change to their admissions charging position in recent years were asked a range of follow-on questions about this. It is interesting to note that of those museums that did not report any change, almost two-thirds (64%) stated that they had not considered making any changes to their admissions position over this time (see Table A1.15).

2.46 For this cohort of museums, it is also interesting to note their consideration, or not, about making any changes to admissions relative to their current charging position. Table A1.16 shows that those who do not charge for admissions are far more likely not to have considered making a change. More than three-quarters (76%) of those who do not charge report that they did not consider making a change, whilst less than half (47%) of those that do charge for admissions report that they did not consider making a change.

2.47 These results suggest that there is a notable cohort of museums (around one-quarter of all of survey respondents) who do not charge for admissions, and have not given any consideration to changing this position in recent years. Looking at this cohort of museums, there is no strong, discernible pattern of characteristics for these museums – they typically represent the survey respondents overall in terms of type of museum, location, etc. However, these museums are slightly more likely to be smaller museums (in terms of visitor numbers), and are more likely to report that the vast majority of their income (75%+) comes from one or two core funders.

2.48 For those respondents that had not changed their charging position but did consider making changes to their admissions charging position (the 36% in Table A1.15), a number of these respondents highlighted the current cost of living pressures as being a key factor in not changing their position. Linked to this were concerns the potential negative effect any changes would have on accessibility, engagement with target audience groups and visitor numbers.

"I've suggested the trustees review the pricing, even if they conclude it should remain the same. At the moment the status quo seems to be being retained due to the number of generic museum leaflets we have in stock."

"We did not want to increase the admission price when visitors were struggling with the cost of living."

"Business case and visitor research strongly militated against change."

2.49 This includes some respondents who feel that their audiences expect free admission; location in areas of deprivation, and those who felt a visit was not worth a charge (for example *"we get comments like 'is this it?' about the amount there is to see and do"* and *"We need to improve the visitor offer before we can put an admission charge in place"*). Some felt that that income from donations would exceed income from any changes to admissions (*"We decided that people would stop voluntary donations if charged for entry."*).

2.50 A number of responding museums reported that they were **actively reviewing their admissions policy or planning to change in 2023**; key reasons for this were pandemic recovery and works underway. For example, prior to 2023, the Black Country Living Museum last increased its prices in 2018. It prioritised pandemic recovery over revenue and was nearing the end of a major capital project that resulted in some disruption to visitors, including the loss of key features. The museum was keen to ensure value for money therefore agreed not to increase prices for three years from 2019 to 2022 but has increased its pricing for 2023 as the development is completed, and the full site has reopened.

2.51 Like those museums that had made a change to their admissions charging position, in most museums (including those where there had been reviews and analysis) decisions on admissions policy was made by the governance processes in place in each museum. Typically, this would be by the board of trustees on recommendation from senior management.

2.52 Several museums that considered changes to admissions but decided not to change used benchmarking and modelling to inform their decision. Those that used modelling looked at their running costs against income to see if such changes were necessary, and benchmarking approaches looked at comparators and what competitors were doing. A few made this decision as part of annual business planning reviews.

2.53 Also, respondents were asked whether they were planning to change their admissions charging position during this calendar year (2023)[5]. Table A1.17 shows that more than three-quarters (76%) of respondents were not planning to change their admissions charging position.

2.54 These results were cross tabulated with the current charging position overall, and Table A1.18 shows that those museums that do not charge for admissions were overwhelmingly not planning to change their admissions charging position (96%). In comparison, those that have some form of admissions charging are more likely to have been planning to change their admissions charging position (37% as compared to the 4% of those that do not charge).

2.55 As noted above (see Table A1.17), around one-quarter of responding museums reported that they planned to change their approach to admissions in 2023. The majority of these intended to increase the price of admissions, with some also altering or removing some concessions. In addition, a couple are introducing annual passes.

2.56 A small number planning to move to free admissions, and one from free to charging. Others are currently reviewing their admissions approaches.

2.57 The National Civil War Museum in Newark is reviewing the challenges of service delivery post-COVID and the impacts of the cost-of-living crisis, with a decision to permanently offer free admission to residents being taken in April 2023 and implemented, driven by low levels of engagement with residents when charged entry, and a need to increase town centre footfall. The museum expects more footfall from target audiences, a better engaged local community leading to improved advocacy, and opportunities to increase on-site secondary spend.

2.58 In terms of the main factors that were influencing the decision to change charging position, the need to cover increasing costs, increase income, or support financial sustainability was cited by many museums considering such a change. Such costs include staffing, energy and utilities, the cost of stage exhibitions, and income lost during the pandemic.

"We need the income, but this is the last increase we think our audiences will bear without a new offer."

"Price rises to date don't appear to have had negative impact on visiting and have driven rising revenues, and comparator studies suggest we are probably still underpriced".

2.59 Once again, benchmarking and reviews will be used by several museums that are considering a change.

2.60 Those few responding museums that either plan to go free, or remove some concessions, highlight the cost-of-living crisis as a key factor and anticipate that some audience segments would no longer visit without such changes.

---

[5] It should be noted that the survey was carried out during February and March 2023. Therefore, these responses were provided in the early part of this year.

2.61 In terms of the anticipated impacts of any planned change in admissions position/strategy in 2023, museums report that they are doing their best to balance any planned increase to minimise negative impacts with audiences. One respondent is planning a half price 'Cost of Living' day, and others plan to improve marketing and offer more events to maintain visitor levels. A few responding museums anticipate a reduction in visitors.

"It should be minimal. It's a round number and we have had some feedback from visitors saying that our charges are low and would be happy to pay more."

2.62 Many museums anticipate increased income, and little if any change in visitor numbers, although some concede this is difficult to predict. For example:

- Bletchley Park are hoping there will be no change to a planned increase in prices but note that business planning in the current environment is challenging and it is very hard to predict visitor reaction.

- Brooklands Museum expects an increase in revenue and are watching out for any drop off in people adding the 10% donation for Gift Aid.

2.63 A number are unsure of the impacts of a change in admissions position / strategy in 2023, hoping to raise revenue and minimise adverse audience impacts.

2.4 Other Considerations around Charging

2.64 There are a range of other issues and considerations around charging for admissions in museums that were explored in the survey.

2.65 On Gift Aid, museums present a mixed picture (see Table A1.20). One-fifth of respondents stated that Gift Aid was not applicable because they are not eligible for the scheme. If these respondents are removed from the answers provided then the results show that 38% do not claim Gift Aid for admissions, 34% do claim Gift Aid on admissions using the annual pass scheme, and 28% claim Gift Aid on admissions using the additional 10% scheme.

2.66 One interesting aspect explored by the survey relates to whether museums collect information about the demography and diversity of visitors. Table A1.21 shows that only one-third of respondents reported collecting such information. Given that these results show two-thirds of respondents do not collect information about the demography and diversity of visitors, this was explored in more detail by looking at these responses in relation to the charging position of museums.

2.67 Table A1.22 shows that only 23% of those that do not charge for admissions collect information about the demography and diversity of visitors. In contrast, 37% of those that charge for admissions in some way collect information about the demography and diversity of visitors. Whilst there is therefore a variance, with those that charge for admissions being more likely to collect such information, it is still just slightly more than one-third of respondents at 37%.

2.68 The survey also asked about a range of other admissions charging strategies.

- Only 2% of respondents report having used dynamic pricing for admissions, although almost one-fifth (19%) have considered using it but have not yet used it. 80% of respondents have neither used nor considered using dynamic pricing (Table A1.26).

- Almost one in ten respondents (9%) have used Pay What You Can / Pay What You Like admissions pricing strategies, with a further one-fifth (19%) having considered it but not yet used it. 72% have neither used nor considered Pay What You Can / Pay What You Like admissions pricing strategies (Table A1.27).

- Around one-in-twelve respondents (8%) report having used charging for virtual or online access to the museum, with a further one-fifth (20%) having considered it but not yet used it. 71% have neither used nor considered charging for virtual or online access to the museum (Table A1.28).

- In comparison, specific admissions charging models for school visits is far more prevalent with most museums (51%) reporting that they have used these, and a further 13% reporting that they have considered this. Just over one-third of museums responding to the survey report that they have neither used nor considered using specific admissions charging models for school visits (Table A1.29).

- One-fifth of respondents report that they have used, or considered using, other specific pricing models for admissions (see Table A1.30). The most common types of pricing models reported, in order of prevalence, include:

- **Charging for group visits**
  "Bespoke tours for groups - we charge for group visits including tour with curatorial staff"
  "We have specific pricing models for group visitors (e.g., U3a, and travel trade)"
  "Group bookings are offered a lower entry fee"
  "Charging for tour groups."
  "Group rates for adults of 10 or more"
  "We have a charging policy for group visits."
  "We accommodate group visits at agreed charges"

- **Charging for events, workshops, and other activities**
  "We charge for events and workshops, holiday activities, room hire, talks and guided tours, guided walks, regular group activities."
  "We charge for special events. We have free events but with 'suggested donation' approach."
  "We charge for admission to specific ticketed events such as talks around the gallery as managed by our events team"
  "We have a variety of pricing structures for events, some affordable and developed for a mass audience, but also including private views of treasures of the collection and private tours at a significantly higher price point."

- **Specific donations, free entry, or membership models for schools**
  "We also offer educational membership for schools and education groups"
  "School visits are always free, because otherwise schools would not be able to afford to visit"
  "We plan to ask for donations from schools as much depends if they have funds available. We try to be flexible and are entirely opportunistic!"

- **Discounts for online booking / pre booking**
  "We're looking at introducing a discount on admission for those who book online in advance."
  "Discounts for online booking in advance"
  "discount if pre booked."
  "Early bird and last minute booking fees"

Benchmarking Admission Pricing Levels

Image credit: Yr Ysgwrn cegin / kitchen credit Andrew Lee

Benchmarking Museums Admission Pricing Levels

3.1 Introduction to Section 3

3.1 This section looks at current admission prices for museums, and presents a range of admission price benchmarks for museums in the UK for key ticket types. The overall results are presented as well as price benchmarks for admission to museums disaggregated by key museum characteristics and relevant contextual factors.

3.2 Please note, the survey took place in February-March 2023, and the benchmark data is therefore from that point of the year. The admission prices for some museums may have changed since then. Also, as previously, the tables referred to throughout this section are included in Annex 1 to this report, and the charts or tables included below are summary versions of the same results.

3.2 Overall Museum Admission Pricing Benchmarks

3.3 In terms of the average prices charged for general admissions, Table A1.31 in Annex 1 and repeated below shows the results around pricing from the survey for those museums that charge for admissions.

	Mean (£)	Median (£)	Lower Value (£)	Upper Value (£)	Count
Adult	8.99	7.60	2.00	45.00	210
Conession	7.63	6.60	0	26.00	126
Child (older)	3.64	3.00	0	18.00	204
Child (younger)	0.70	0	0	8.50	198
Family	26.46	24.00	7.00	77.00	105

3.4 The results show that:

- The average (median[6]) price for an adult ticket for general admission is £7.60 with a notable range of prices underneath this average – from £2 to £45.
- The average (median) price for a concession ticket for general admission is £6.60 with a notable range of prices underneath this average – from £0 to £26.
- The average (median) price for a younger[7] child ticket for general admission is £0, and again there is a range of prices underpinning this – from free to £8.50.
- The average (median) price for an older child ticket for general admission is £3, and again there is a notable range of prices behind this – from free to £18.
- The average (median) price for a standard family ticket for general admission is £24 and the wide range of prices underneath this average varies from £7 to £77.

[6] The median average is the middle number in a set of data, when the data has been written in ascending size order. It is preferable to use the median values when the distribution of data values is skewed or when there are clear outliers – as the lower and upper values indicate is the case here. Therefore, whilst the tables in Annex 1 provide both the mean and median values it is the median values that are reported in this Section.

[7] The child ticket prices are separated into older and younger as many museums report differing prices depending on the age of the child/ren. Whilst the exact age at which the distinction between older and younger is made varies between museums, given that such a distinction is made, it is useful for these results to be presented separately.

3.5 Comparing these results to other sources shows that the results exhibit a general consistency with other evidence. For example, the 2022 Annual Museum Survey[8] reported a median adult admission charge of £6.50 and a median child admission charge of £3. Data provided by the Art Fund specifically for this research shows a median standard entry price of £8.10.

3.6 Beyond the key ticket types (adult, concession, child (older and younger) and family) reported in this section, many museums offer a wide variety of other ticket types and a wide variety of discounted entry for particular types of individuals or groups. This can include the following (presented in order of how commonly these additional pricing mechanisms are offered):

- Free access for carers. This is an almost universal offer from museums.
- Discounted or free entry for Friends of the museum or those who are part of an annual membership scheme.
- Discounts for group visits (see Section 2.4 above).
- Discounted or free entry for Museums Association, Art Fund, and other national membership schemes (e.g., Historic Houses).
- Discounts for booking online in advance – ranging between 10% and 25% for such discounts. Although, very occasionally, there are museums that charge a booking fee for online booking.
- Other specific discounts – e.g., military museums typically offer discounts to current or ex-service personnel; discounts for students; blue light discount (i.e., discount for the emergency services, NHS, social care sector and armed forces) – which is typically between 10% and 20%; concessions for younger adults (e.g., those aged under 25 or under 30).
- Free entry for local people. Whilst not common (less than 1 in 15 on average) some museums offer free entry to local people.
- Offering free entry for a child when accompanied by a paying adult.
- Offering a discount into affiliated museums when showing an admission ticket.
- Although rare, some museums offer varying prices for different seasons (e.g., summer/winter) or for different days (weekday/weekend).

[8] https://southwestmuseums.org.uk/annual-museum-survey-archive

3.3 Museum Admission Pricing Benchmarks – By Different Characteristics (Type, Geography, Local Context)

3.7 Looking at these pricing benchmarks in relation to other museum characteristics and factors highlights a number of useful findings.

- When considered by geography (at the national level) Table A1.32 shows that there is some variation in average admission prices – the median adult price in both England and Scotland was £8, whilst for museums in Wales it was £6.50. This pattern is repeated for some of the other main ticket types (concession and family), although not for children where there is equivalence of prices across the nations[9].

- Looking at geographies within England, Table A1.33 shows that, in terms of median prices, museums in the North of England report a lower average price than museums in the Midlands or the South for adults (£7 compared to £8.80 and £8) and concessions (£5 compared to £6.88 and £7) but there is little variation by these geographies for children or for family admissions.

- Drilling down into the regions within the South of England, a pattern emerges of museums in the South West reporting lower median admission prices when compared to London or the South East. For example, the median price for adults was: £10 for London, £8 for the South East, and £5 for the South West. Similar patterns emerge for concessions (£8 in London, £7 in the South East and £4.25 in the South West), older children (£6, £3, and £0 respectively) and family tickets (£23.75, £24, and £20). Younger children are on average, free in all three regions.

- In terms of museum type, the results (see Table A1.35) show that there is little variance of the median prices by type of museum for adults, but some slight variance for other ticket types. Given the large proportion of respondents that are independent museums, the results compared independent museums against all other types and showed a median adult price of £7.60 for independents, and £7.75 for all other types, £7 and £6 for concessions, £2.98 and £4.50 for older children, and £25 and £22 for family. Younger children are on average, free for all museum types.

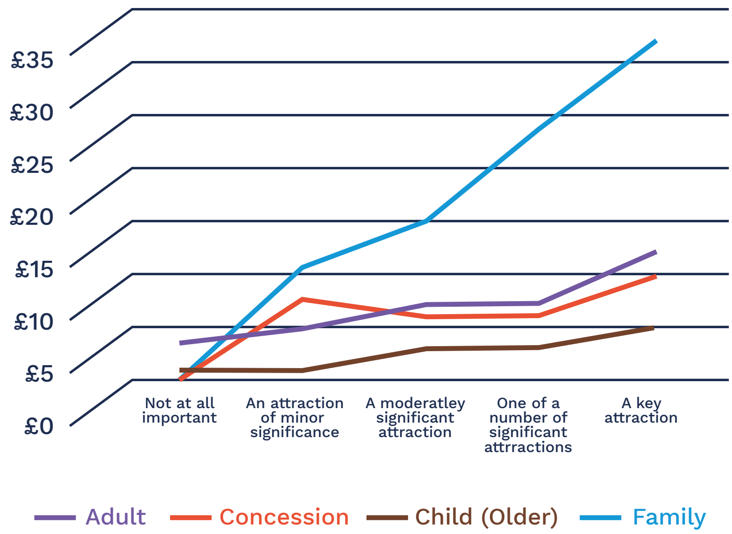
[9] There is no data on admission pricing benchmarks for museums in Northern Ireland from the survey due to the very low number of replies received from museums in Northern Ireland.

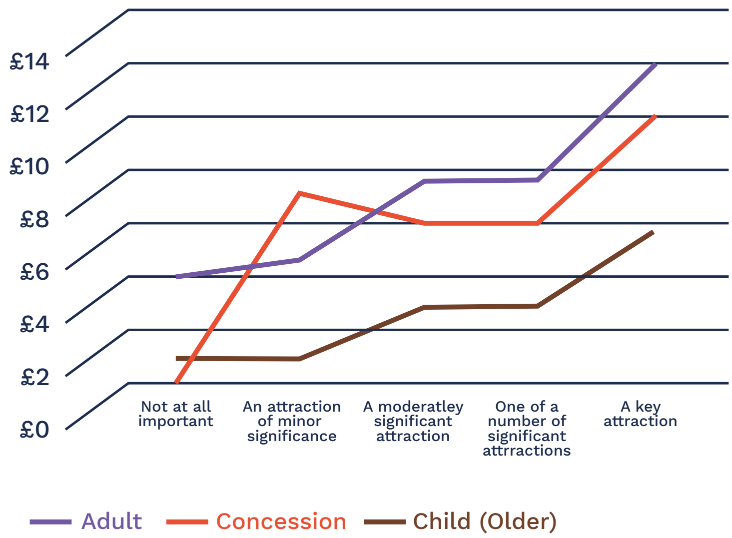
- This shows that generally there is little variance between median admission prices by type of museum (Table A1.35) however, the likelihood of charging or not (see Table A1.4 earlier in Section 2) does vary more by museum type. Therefore, whilst prices do not vary much by type the propensity to charge does.

- Looking at the level of core funding for museums shows that there is no variance in the median adult price between the main categories of core funding (Table A1.36), with all core funding positions (no core funding, any level of core funding, higher core funding (50%+) or lower core funding (0% to 50%) reporting median prices of £8. However, as with type of museum, the propensity to charge or not does vary by core funding position (see Table A1.6).

- Assessing median admission prices by the level of competition for visitors in the locality where the museum is based shows (Table A1.37) that prices are typically lower in areas that report it is not at all competitive to attract visitors. Beyond this, any level of competition (slightly, moderately or very competitive) clearly shows higher median prices relatively. This suggests that for those museums that do face local competition for visitors, competing on price does not seem to be a common strategy – this issue is revisited in Section 5 of this report.

- Unsurprisingly, the results show that (Table A1.38) the more significant the museum reports that it is to the visitor economy of the local area, the higher the median admission prices. For example, adult prices by importance of the museum show (£4 – not at all important; £5 – of minor significance; £7.50 – moderately significant attraction; £7.50 – one of a number of significant attractions; £12 – a key attraction).





- When median admission prices are considered relative to the size of museum (using 2022 visit numbers to categorise size), the results (Table A1.39) show that for adult prices, the bigger the museum the higher the admission price (£6.75 for museums with up to 20,000 visits; £12 for museums with between 20,000 and 50,000 visits; £13.50 for museums between 50,000 and 100,000 visits, and £19.80 for museums with more than 100,000 visits). The same pattern emerges for concession tickets and family tickets, and also for older children with more of a levelling out of prices for medium/large museums. Younger children are on average, free for all museum types. These results align with the findings from bespoke analysis of the 2022 Annual Museums Survey[10] which showed the same relationship between museum size and median adult standard admission charge.

- Finally, looking at admission prices by the proportion of local visitors to the museum (where museums are categorised by whether more or less than 50% of their visitors are local), the results (Table A1.40 and summarised below) show that those museums who report 50%+ of visitors being local have a higher median price compared to those where locals account for less than 50% of visitors.

Extract from Table A1.40: Museum Admission Pricing Benchmarking Results by Proportion of Local Visitors to Museum

50%+ Locals	Adult	Concession	Child (older)	Child (younger)	Family
Median (£)	9.00	8.50	3.25	0.00	25.00
Minimum (£)	2.50	3.00	0.00	0.00	10.00
Maximum (£)	28.50	26.00	18.00	8.50	77.00
Count	63	40	62	61	34
Less than 50% local	Adult	Concession	Child (older)	Child (younger)	Family
Median (£)	7.00	6.00	2.50	0.00	24.00
Minimum (£)	2.00	1.30	0.00	0.00	8.00
Maximum (£)	25.50	23.00	17.00	5.00	68.50
Count	67	38	65	62	33

[10]Bespoke data from the Annual Museum Survey 2022 (https://southwestmuseums.org.uk/annual-museum-survey-archive/) was provided to the study team for this research by South West Museum Development. Their support in providing this data to help inform this research is much appreciated.

Impact Of Changing Admissions Charging Strategies

Image credit: Hampshire Cultural Trust

Impact Of Changing Admissions Charging Strategies

4.1 Introduction to Section 4

4.1 This section presents the findings from the research about the impacts of different admissions charging strategies, focusing on the impacts on museums of changing admissions pricing policy. This section focuses on the four most common changes – an increase in admission prices, introducing new types of tickets, moving from charging for admissions to free admissions, and moving from free admissions to charging for admissions.

4.2 Impact of Changes to Admissions Charging

4.2 As noted in Section 2 of this report, half of respondents (50%) report not making a change to their admissions charging position in any of the specified time periods (2018 and 2019, 2020 and 2021, or 2022) – see Table A1.13.

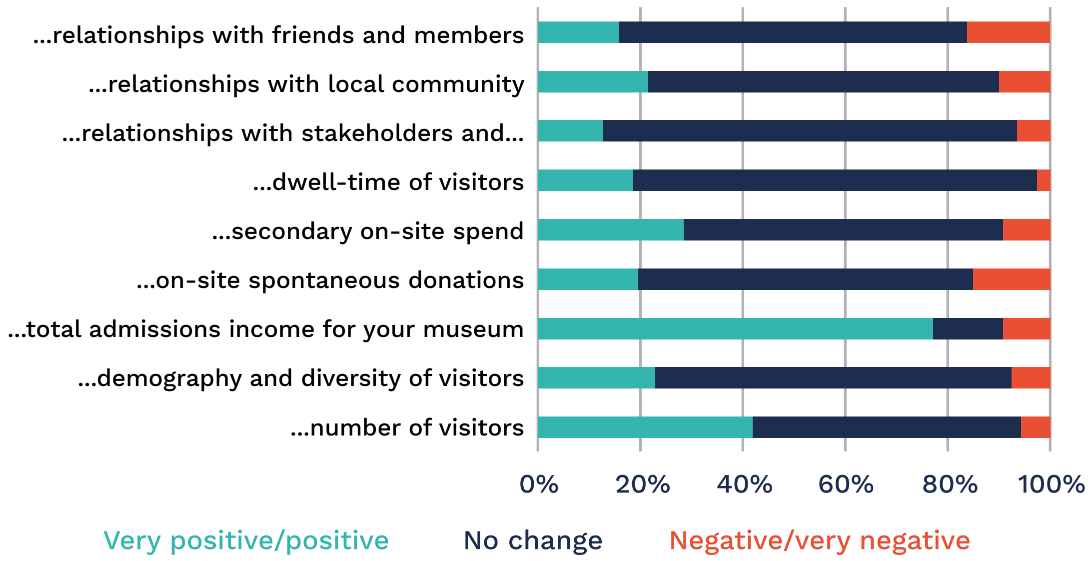
4.3 For those museums that did make a change to their admissions charging position, the survey results (see Tables A1.41 through to A1.45 as well as Table A1.14 reported on in Section 2) show that, by far, the most common type of change to admissions charging strategies that museums have made in recent years is an increase in admission prices (114 museums reported they had made this change – 70% of those that responded to this question). The second most common change is the introduction of new type(s) of tickets (49 museums reported they had made this change – 30% of those that responded to this question).

4.4 Making a more fundamental change (from charging for admissions to free admissions, or from free admissions to charging for admissions) are less common but have occurred – 29 museums (18%) reported moving from charging to free admission whilst 18 museums (11%) reported moving from free admission to charging.

4.5 The impacts reported by museums for each of these types of changes to admissions pricing strategies are considered below – the order they are presented in reflecting how common each change has been in recent years for museums that responded to the survey.

4.3 Increase in Admission Prices

"Don't undersell, and don't discount"
"Got to keep up with inflation"



4.6 Museums that reported that they had increased admissions prices reported a range of impacts. The most positive impact is that total admissions income had increased, and some even reported positives in terms of the number of visitors, and secondary on-site spend.

4.7 Many museums that raise prices reported that there was little negative impact. Some found that they had been underpriced for quite some time. For example, Brooklands Museum reported that in the past they had lost a significant level of potential income by being priced too low and had raised their prices consistently and significantly over the past five years with no negative effects.

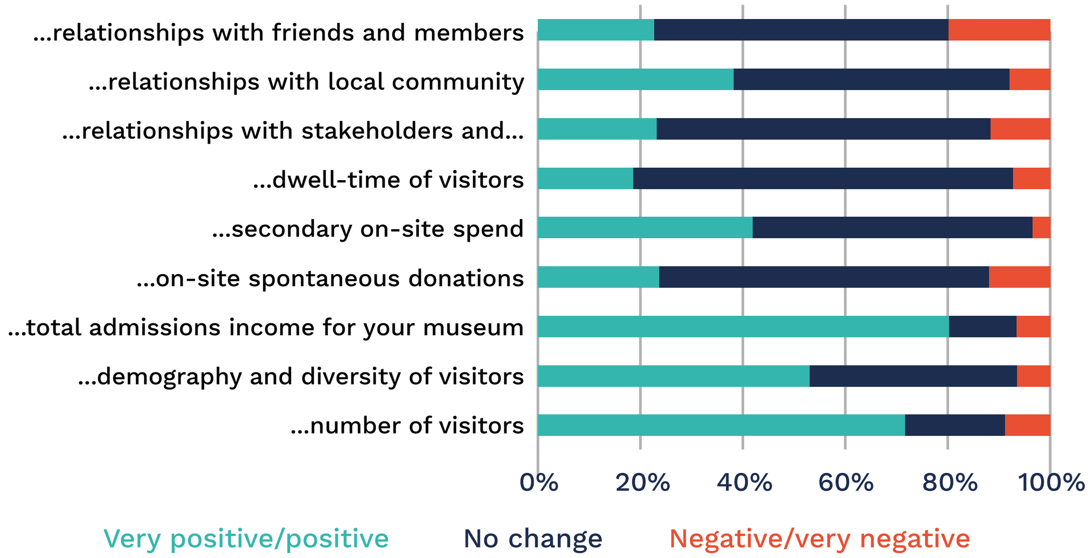
4.8 Museums that reported no negative effects often stressed the importance of clearly communicating value for money. For example, Bletchley Park Trust found that annual price increases were generally accepted by visitors as long as the value was clear, and whilst visitors might initially feel prices are expensive, such perceptions change when they see the value of the offer. Similarly, Black Country Living Museum stressed the importance of investing in value for money in line with price rises.

4.9 Trimontium Museum introduced an admission charge and a subsequent increase in admission price following a major refurbishment, and emphasised the importance of benchmarking with other relevant comparators (i.e., Roman sites in Trimontium's case) as well as giving due consideration to the current economic circumstances and making sure that you *"don't price yourselves out of people's pockets"*. This is especially important for museums in a small community, and the use of incentives such as free access days, community days, etc. are an important part of the offer.

4.10 One consultee highlighted that internal nervousness from staff around price sensitivity did not translate into negative impacts. Several consultees highlighted that such nervousness, and on occasion timidity, often led to pricing that undervalued the museum.

4.11 Concern about price sensitivity does not appear to be solely a staff issue, with some museums reporting concerns raised by volunteers, and others reluctance from Trustees when presented with recommendations to raise prices by staff. One consultee suggested that such nervousness is linked to financial and business planning experience.

4.4 Introduction of New Type(s) of Admission Ticket



4.12 The most positive impact concerning new ticket types is an increase of total admissions income, followed by number of visitors and demography and diversity of visitors. Many museums reported no change as a result of changing ticket types.

4.13 Ironbridge Gorge Museum Trust are actively looking at ticket simplification to make transactions easier at the entry gate and developing a direct debit incentivised membership ticketing approach to support better engagement across its 10 sites. Ironbridge also reported that some concession ticketing was dropped during the pandemic, with tickets being classified as adult, child, student and core carer. There were no reports from front of house teams of any issues with this change.

4.14 Dinefwr charged for admissions pre-pandemic, and used to implement an annual increase in pricing. However, post-pandemic Dinefwr changed the pricing structure completely – introducing a separate car parking charge and moving admission per person to the house only. This change in pricing policy and introduction of new type of tickets has had a number of positive impacts. Visitor numbers have increased significantly each year since the change, and there are now more diverse visitors coming to Dinefwr. Donations have increased (but this is due to other factors), and they now receive income from the car park as well as admission to the house.

4.15 The Judge's Lodging made some changes to their admissions charging policy – increasing adult ticket price, removing concessionary price for seniors, providing greater levels of other concessionary ticket and changing the family ticket pricing. All of this was with intention of *"making ticketing fairer for those who may need lower costs"* as well as recognising *"the difference in family group make-up"* and to *"increase income for the museum to help cover rising costs".* This process involved benchmarking The Judge's Lodging prices – both locally and with similar museums/attractions elsewhere in the UK.

4.16 Whilst the museum has noted that some visitors still ask about concessions, they can explain why the change has been made – linking it clearly to a cost-of-living rationale. The change has also helped The Judge's Lodging to strengthen its relationship with the local community – and *"local people now see the value of Judge's Lodging compared to pre-Covid".*

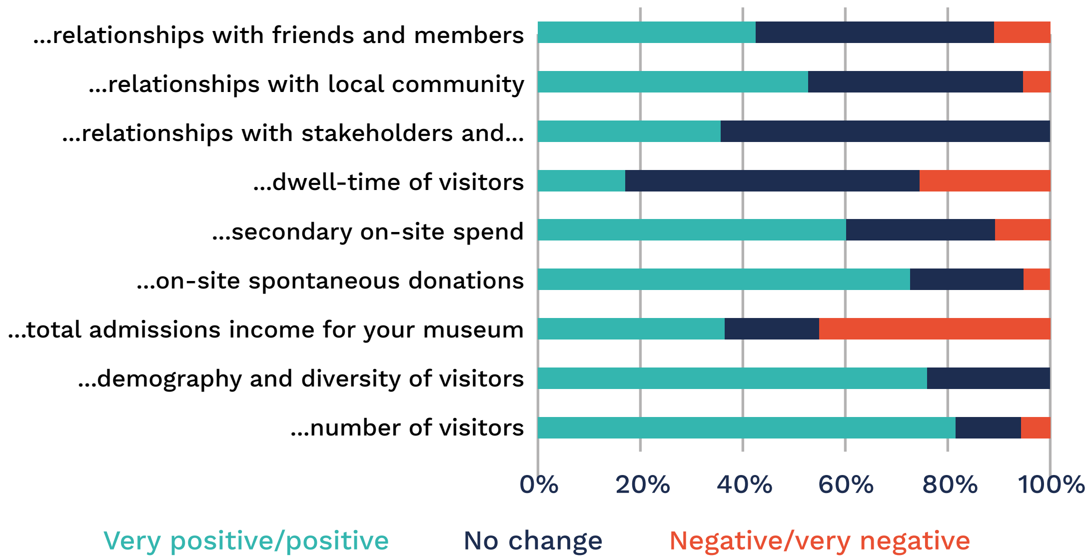
4.17 Some museums noted a greater take up in annual passes because of the cost-of-living crisis. This can be regarded as visitors looking to derive further value from their visits.

4.18 The Historic Dockyard Chatham changed the format of its family ticket to two adults and up to four children, giving better value and which has proved to be popular.

4.19 Avoncroft Museum of Historic Buildings was one of several museums that reduced prices during the pandemic to reflect a reduce offer. After the pandemic, prices were restored, but a decision was taken to reduce child ticket prices to a little over half the price for an adult.

4.20 A number of consultee museums have ticketed event weekends, for which prices are higher as there is much more on offer.

4.5 Moving from Charging for Admissions to Free Admissions



"Ensuring free entry for those that need it most"

4.21 The most positive impact of this change is on visitor numbers, followed by demography and diversity of visitors, and then on-site donations, secondary spend and relationship with local community. Most negative is naturally around admissions income.

4.22 Kirklees Museums & Galleries used to charge for admissions to Oakwell Hall but changed the charging strategy to free admissions as a result of the pandemic, to encourage visitors to return and to provide local people with free access to the Hall. Free admission has been retained for the time being, primarily due to the increase in visitor numbers that has resulted, as well as the wider benefits of such a strategy for the service in terms of addressing community needs and having a positive impact on inequalities. Kirklees Museums & Galleries report that the move to free admissions has impacted very positively on overall visitor numbers (they are now more than three times what they were before the pandemic) as well as the diversity of visitors, and the number of local visitors as well as the feedback from the local community. Whilst there has naturally been a fall in admissions income, the service is looking at generating income in other ways (including through donations which have notably increased already).

4.23 Charles Dickens Museum reported a marked affection for the museum in its local area and is building on this by developing partnerships to deepen its relationship with local audiences. This includes free entry partnership packages, and targeted projects for youth groups.

4.24 The National Civil War Centre & Newark Museum have considered a range of options to better engage with local audiences, including discounts and half price offers. This followed research suggesting that less than 20% of its visitors were local, and piloted both half price entry for residents, and free entry for residents, during school holiday periods. This has improved local engagement, and the Newark and Sherwood District Council are looking to implement free entry for residents on a postcode basis.

4.25 The Heritage Centre Bellingham has moved from charging for admission to free admissions – with the new strategy being badged as 'pay what you feel'. Early indications are that the change of strategy has been positive – with the Heritage Centre taking more in donations during the trial period than they did with the previous charging for admissions strategy. Some of the benefits that the Centre as noted include that those with disposable incomes give more in donations than they were being asked to pay in an admission charge (including those that may have benefitted from a concession ticket under the charging model).

4.26 York Art Gallery charges for admissions to specific exhibitions only, having previously charged for general admissions and moved to free admissions for the permanent collections. During the pandemic York Art Gallery trialled various pricing models including donation only, pay as you feel, and charging for exhibitions and being free for access to the permanent collections. The change away from charging for general admissions was driven by the desire to increase the number of visits and increase the diversity of the audience and *"to make art more accessible"*.

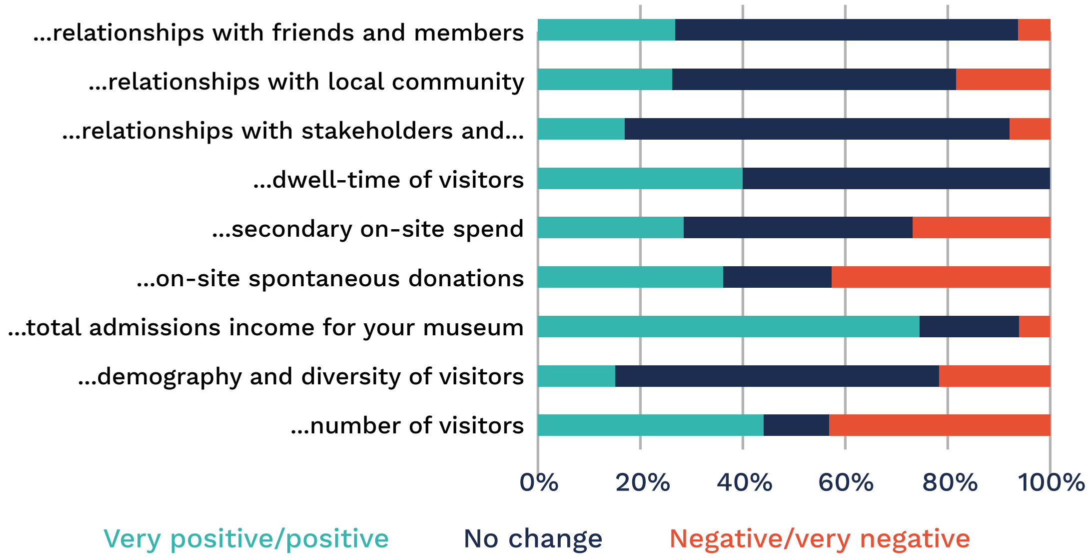
4.27 The change has impacted positively on visitor numbers, which *"increased by 50% as we moved to free admission for the permanent collection and charging for the exhibition galleries"*, and, whilst research is still being undertaken, the indications are that a *"broader range of demographics are being reached"*. Furthermore, it has had a positive impact on relationships with funders. However, income has fallen substantially, there is no change in on-site secondary spend, and dwell time has fallen for those accessing for free. York Art Gallery has also found, in terms of charging for exhibitions, that *"the 'quality'/populism of the exhibition is key to the levels of income both in admissions and secondary spend."*

4.28 Reflecting on the period during which they offered free admissions (due to the pandemic), the Library of Innerpeffray notes that *"when entry was 'by donation' or 'pay what you will' (during a quiet season) we made significant income from donations"*. It did consider keeping the donation/'pay what you like' policy – especially as *"it had clear links to our founding purpose/principles"* but donations did not achieve the levels of income from admissions, so charging (see below), but with the offer of the free month in March, works well.

4.29 Rutland County Museum is free for entry but is looking actively at opportunities to generate more income, including working in partnership to realise the benefits of significant recent local discoveries.

4.30 Biggar Museum offers free access to local people (within a specified postcode area) but charges admission for other visitors. They have experienced non-local people walking out when they find out there is an admission charge, so find it can be a challenging environment around charging for admissions. Lessons around their approach to pricing include being very clear about the offer for local people (including for how long such an offer is in place), making sure you *"spell it out"* about the charitable status of the museum, and making sure that advertising of pricing is done effectively so that *"it doesn't stop people from coming through the door"*.

4.6 Moving from Free Admissions to Charging for Admissions



4.31 Museums that move from free to charging highlight the most positive impact being a rise in total admissions income followed by number of visitors and dwell time of visitors. Beyond that, no change was highlighted by many in terms of impacts, however, negative aspects around number of visitors and on-site spontaneous donations were highlighted – although others report positive impacts around these two factors.

4.32 The change from free admission to charging for admission brought a number of benefits to the National Football Museum including a significant increase in income (more than three times what it was before). Average dwell time grew significantly, there was a reduction in casual visiting, and secondary spend was unaffected. Unsurprisingly, the change led to a reduction in the number of visitors, and a major reduction in donations.

4.33 Reflecting on the change from free to charging, the National Football Museum notes that "*visitor numbers will drop, but engagement and dwell time will increase*", in addition to which, income has become "*higher and much more predictable and reliable*". The Museum highlighted that they "*created a mechanism to let very local people visit for free*", and that "*after we started charging we worked even harder to make the visit better value and more enjoyable, so our overall offer post charging is better*". As with many other museums, the National Football Museum emphasised the importance of getting the staff on board with this type of change in admissions strategy.

4.34 West Highland Museum does not charge admissions to individuals but *"relies on donations and shop sales to cover operational costs"*. The Museum moved from charging for admissions to free admissions a decade ago which resulted in a six-fold increase in footfall. In 2022 they introduced a charging policy for groups over 10 due to coach companies taking advantage of the free admission policy and individual coach guests did not donate believing an entry price/donation was paid by the tour operator. The museum also charged admission for a special exhibition in 2022 to help raise funds post pandemic whilst visitor numbers were still recovering (the first such exhibition for a number of years) – children and locals were still granted free admission for this exhibition. Free entry for locals is described as *"dramatic"* in terms of achieving *"local buy-in"* for the museum. The 2022 exhibition had a positive impact on both visitor numbers and admissions income, in addition to which, the museum noted that people continued to donate – *"adults entitled to free entry often paid for a ticket or donated"*. The museum also noted that *"lots of local visitors who would not normally visit came for the special exhibition"*.

4.35 Cyfarthfa Castle Museum & Art Gallery currently charges for admissions and has increased prices for admissions in recent years. It was (prior to 2014) a free admission museum, but this changed with the introduction of a small (at the time £1) admission charge for adults, which has increased occasionally since then and now sits at £2.50 for adults and £2 for concessions (students and over 60s) – with free access for those aged under 16.

4.36 Comparing the free admission position with the current admission charging scheme, Cyfarthfa Castle Museum & Art Gallery notes the negative impacts that charging for admission has had on visitor numbers, diversity of visitors - especially local visitors, donations, and secondary spend. The context, of free access to National Museums in Wales, plays a role on the perceptions of potential visitors, which the museum finds to be challenging. The museum is in a position where it is feeling the negative effects of charging for admission whilst not reaping the benefits of charging in terms of admission income due to the low admission price.

4.37 Yr Ysgwrn charges for guided tours of the house, and for some events. Charging was introduced following the acquisition and development of the property by Eryi National Park. The Park and the family have developed a good relationship, and whilst the family were not comfortable with charging for Yr Ysgwrn, they understood that it was necessary for the project's sustainability.

"Who will come?"

4.38 Yr Ysgwrn reported that at the time there were short-lived negative impacts from charging for tours of Hedd Wyn's house with the local rural community in and around Trawsfynydd, who knew the family well. There was some anxiety around visitors' preparedness to pay, and expectations of failure. The house is open for several days for free and publicised locally, and the Park is working on a community project with Heritage Fund funding to mark the centenary of the unveiling of the statue of Hedd Wyn in 2023.

4.39 The Library of Innerpeffray reacted to the pandemic by moving from charging for admissions to free admissions, and then reverted to charging and increased their prices post-pandemic. The move to free admission was motivated by the reduced experience at the Library due to Covid restrictions, and also to *"encourage people who were struggling with reduced income"*. The reintroduction of a slightly increased admission price reflected the Library's *"increased costs and perceived value"*.

4.40 The reintroduction of admissions pricing had no impact on visitor numbers or diversity of visitors, whilst impacting positively on income for the museum. Whilst the Library does not offer concession tickets, it does offer a free month in March every year and this works well.

Reflections on Current Patterns, Innovations and Good Practice

Image credit: Rutland Museum

Reflections In Current Patterns, Innovations and Good Practice Around Admissions Pricing

5.1 Introduction to Section 5

5.1 This section reflects on the research findings, and outlines some of the key patterns around admissions pricing strategies for museums, identifies some of the emerging innovations around admissions pricing, highlights some examples of good practice, and presents some key lessons for museums about admissions charging.

5.2 Patterns Around Admissions Charging for Museums

5.2 There is a real mix of confidence and reticence/nervousness about charging in museums, as noted in Section 4. Some, mainly larger independent museums, are confident about their value, and are commercially focused on catering, trading and events as well as admissions. Many of these museums review admissions each year as part of their business planning processes.

5.3 In contrast, whilst there are those such as Derby Museums who do not charge as a matter of principle, there remain museums which lack the confidence in their museum to either charge, or to increase prices.

5.4 Many reported little audience negativities over increases in charging, with reporting no difference in visitor numbers, and little evidence of price elasticity from museums.

5.5 Secondary spend appears to not be typically affected by changes in price. For example, Wordsworth Grasmere have noticed that secondary spend has not been affected by the increases in admissions pricing – supporting feedback from other consultations as well as the finding from the previous (2016) admissions pricing research[11].

5.6 Whilst this research did not elicit the views and perspectives of visitors, a reasonable hypothesis for this would be that (i) the decision to visit is made in advance and planned, but (ii) decisions on secondary spend are in the moment and based on more immediate considerations ("I am hungry", "I really want to buy something" etc.).

5.7 There is evidence of some layering of extras along with rise in price. For example, as part of its pandemic recovery strategy, Charles Dickens Museum now includes its downloadable audio tour as part of its admission price, which can be enjoyed after as well as during the visit.

5.8 Free to charging reduces visitor numbers, but mass outcry is rare. The reduction is mainly due to charging stopping fleeting visits, and as Taking Charge highlighted in 2016, free and charged for data on admissions is often not comparable.

5.9 The approach to charging can be dependent on the values and founding principles of museums. Derby Museums, which has longstanding free admissions policy, was charging for some exhibitions in a dedicated space, including a recent Henry Moore 'threads of influence' event. However, the museum felt the space was not large enough, and felt it was a 'forced' donation, preventing people from donating.

5.10 Pay What You Can was described by Derby Museums as a mechanism to strengthen the donations ask (e.g., 'it would be great if you donate') which can be reinforced by a suggested donation amount.

5.11 Many museums are holding prices on school visits, although 2023 has been a better year than 2022 for many in terms of numbers. The schools market remains sensitive to cost of living considerations around both entry price and transport. Some offer discounts to local schools – for example Ironbridge discounts prices for Shropshire schools.

[11] https://www.aim-museums.co.uk/wp-content/uploads/2017/04/Final-Report-Taking-Charge-%E2%80%93-Evaluating-the-Evidence-The-Impact-of-Charging-or-Not-for-Admissions-on-Museums.pdf

5.12 There is sensitivity around the impacts of the cost-of-living crisis on audiences. For example, Castle Bromwich Historic Gardens considered lowering admission and some event prices to support its local audiences but decided to deliver some extra free events to support its immediate communities.

5.3 Innovations Around Admission Charging for Museums

5.13 Most museums that charge implement Gift Aid, and most go for annual ticket by default ("10% is a really hard sell"). There is evidence of some streamlining, with less ticket types ("worked hard to make it easy"), and the removal of concessions for older adults. There is evidence of innovation around family ticketing (no charge for kids with paying adults, and flat fees for adults and children etc.).

"We moved to free for children in 2016 and have not regretted the move."

"Letting people know this is a place for them."

"Dynamic pricing? Admissions is complicated enough as it is .....we are not the Foo Fighters!"

5.14 Dynamic pricing is being considered by larger museums to manage peaks (typically discounting for quieter periods to manage capacity). Whilst there are few examples in practice, some are considering options:

- The Natural History Museum is looking into how it might dynamically price to help target under-represented audiences (such as those with lower incomes; those with accessibility needs that might avoid busier periods) access quieter slots for popular charged for exhibitions like Wildlife Photographer of the Year.

- The Historic Dockyard Chatham is considering dynamic pricing and Pay What You Like to target low-income families as well as other models including fixed reduced-price tickets for those on Universal/Pension Credit schemes, which will in part utilise quieter periods, and in part be cross subsidised by earned income from elsewhere in the Trust.

5.15 One consultee suggested that the sector will move towards what they called 'fixed variable pricing', which is a helpful way to describe the options set out above.

5.16 Consultees explained that admissions are part of a range of income generation options. Derby Museums described the intrinsic importance of their shops and restaurants. The Henry Moore Foundation dynamically price wedding corporate hospitality packages.

5.17 The Henry Moore Foundation began selling tickets online via The Art Fund in 2022 and found it helpful to raise awareness with a wider potential audience.

5.18 Some museums who engaged with the research explained that they had, or were considering, ticketing offers that progressed from annual passes to a 'pass+' membership approach with further benefits. This builds on the approach that many museums have taken to Gift Aid in establishing a deeper and longer term relationship with visitors.

5.19 There is a mixed picture concerning online versus in person ticketing, with many museums reporting that the pandemic reducing the proportion of visitors that turn up to buy tickets on the day. For example, Black Country Living Museum no longer offer online discounts, as the split with 'in person' is broadly equal, suggesting online booking for many is now normal. The Historic Dockyard Chatham had two thirds of its tickets being booked online, which allows for better resource planning and reduced queuing time. Most museums no longer offer discounts for online booking.

5.4 Good Practice Around Admissions Charging for Museums

5.20 Pricing responses during and immediately after the pandemic worked well for many museums. Responses recognised that for many the offer was not normal, and also empowered museums to make quick and effective decisions.

5.21 It is important to recognise that there are price thresholds, and museums should be considerate around moving from, say £9.99 to £10. For example, The Historic Dockyard Chatham found that raising prices beyond rounded numbers was always a cause for caution. Where this is done, the Dockyard found it was helpful to do this in tandem with the launch of a new development or product (the Dockyard went over the £20 threshold at the same time as 'Command of the Oceans' was launched).

5.22 As mentioned earlier, reviewing pricing strategy annually (managing the expectations of visitors, staff and volunteers, avoiding 'big jumps') is good practice, and price increases need to be part of an overall strategy. This avoids 'big jumps' following the deferral of difficult decisions and embeds admissions review in the decision-making culture of the museum.

5.23 Do not assume that charging alone is the panacea to all museum issues. There are many other factors involved in improving the viability and sustainability of museums.

"This is hard as the views of the front of house volunteers will be different to those of the trustees who only look at the balance sheets."

5.24 Listen to your audiences and listen to your front of house team. Their experiences and perspectives are valid and most valuable.

"I think it's a good idea to go 'all in' with your approach - either ticket, or don't ticket. Partial ticketing sends a confusing message."

5.25 Communication is vital, and this cannot be overstated. Explain charging decisions, everyone in a museum, from the boardroom to front of house, paid or volunteers should understand and advocate for the museum.

5.26 Beamish Museum emphasise that it is important to be very clear in communications about why any changes in pricing have occurred – and this can include clear narrative on increasing costs for the museum as well as narrative about adding to the quality of the offer that visitors get – *"For us, is important to stress the excellent value for money offer that visitors receive throughout the year with the Unlimited Pass (pay once, visit as many times as you like during normal opening hours)".*

5.27 Lessons from West Highland Museum around changing the admission charging position include the importance of "overcoming barriers and scepticism of staff and board" as well as the significant role of volunteers – it is *"essential that volunteers feel part of the museum – you need to value their role".*

5.28 Dinefwr, like other museums, emphasise that having *"good communications about where the money goes"* for visitors is important – the 'ask' is easier if the messaging can show that the admission income is going directly towards supporting the offer and the maintenance, upkeep and preservation of the museum and the collection.

5.29 Key lessons from Kirklees Museums & Galleries about changing the admissions pricing strategy include listening to the front of house teams – *"they are the ones that talk to the visitors"*, as well as appreciating the bureaucratic and technical challenges that can be faced with implementing new systems (especially for local authority museums) – *"be patient"*. The importance of recognising that there is a change in culture with a change in admissions strategy and *"taking staff with you"* on that change – empowering them and getting buy in from staff to *"make sure they are part of the process of change"*.

5.30 Key lessons from the Library of Innerpeffray include *"talk to the team"* – *"they do the front of house stuff"*, and the team therefore *"need to be comfortable with any change"*.

5.31 The Heritage Centre Bellingham emphasised the importance of communications in terms of *"making it very clear"* about the donations 'ask', and also of providing a range of options (card and cash) for accepting donations. The importance of communications and being clear on the website, and via social media, about adopting a new pricing strategy was strongly emphasised by The Heritage Centre Bellingham – especially for one such as 'pay what you feel'.

"The public see us as something which should be free or cheap. They aren't willing to bear anything like the true cost of their visit. It's difficult to explain that we are not the local authority."

5.32 Key lessons from this type of perception are:

- Be very clear in communicating big changes.
- An independent museum with no core funding that needs to charge to be viable must communicate this confidently. Be prepared for these conversations, and train front of house staff and volunteers to positively have them with visitors.
- Visitors arriving at the desk with differing expectations around admissions can lead to tension, embarrassment and frustration.
- Avoid scope for difficult conversations at the desk (such as charging extras for exhibitions, complex family tickets, issues over gift aid, donations etc.)

5.33 Introduce significant price increases with new developments ("more for more" such as renovation, new spaces, exhibitions). For example, Bletchley Park coordinated price rises in 2014 following improvements, and in 2020 alongside a new exhibition.

5.34 Beamish Museum highlight having sufficient planning and lead in time for changes to admission pricing are important – making sure that you engage with and communicate with all relevant stakeholders, and this can include the board, staff, and volunteers as well as visitors.

5.35 Dinefwr emphasise the importance of *"clarity of admission prices"* and the *"reasons for cost help visitors to understand the value of their admission"*. As with many other examples, they also highlighted that *"staff need to be well trained in this and have confidence in the costs"*. Dinefwr also emphasised that *"it is not easy to do"* making such a change – *"don't let people think it'll be easy"*, and that it is important to have *"open communication"* and *"talk through the issues"* with the team and to *"bring the team with you"* – be "open and honest" with staff and with visitors. Lots of different elements underpinned the success that has occurred, especially *"the confidence and determination"*.

5.36 Decision making should always be based on good data and sound analysis.

5.37 'Pay what you feel' works well as a donation strategy for some ("it's really helpful in managing visitor expectations").

5.5 Lessons Learned/Issues to Consider Around Admissions Charging for Museums

"Don't be afraid to charge but ensure everything you do is in line with your core purpose and values."

5.38 A clear conclusion from this research is that pricing cannot be considered by museums in isolation, it needs to be part of the business planning process and informed by the values of the institution.

5.39 Many museums use benchmarking as part of their decision-making processes. In doing so, it is important to look at the relevance of comparators, and look at their offer, the circumstances and key characteristics, and whether comparisons are reasonable and meaningful.

"Don't be afraid to change"
"Don't need to give it away"
"Don't undersell what we do – make it brilliant and people will come and people will pay"

5.40 It is important to be confident in making decisions about pricing, and not to undersell. Many museums that charge argue that annual price increases are generally accepted by visitors as long as the visit is regarded as value for money.

5.41 It is important to make sure museums engage and persuade boards, stakeholders, staff and volunteers around pricing and admissions.

5.42 Key lessons around the change in admissions pricing for the Judge's Lodging include having the confidence to do it – *"don't be frightened to do it"*; *"don't be frightened to put the prices up"* – whilst ensuring that there is a balance in the way it is presented, and that you have "a clear, consistent message" about prices, and pushing the message about being independent and having to generate income is an important part of that.

5.43 It is important to manage expectations. Many museums are removing or streamlining concessions ticketing, and it is important to be clear and upfront with messaging with concessions from seniors in particular.

5.44 If donations are an important part of a museum's pricing strategy, it is vital to be clear and coordinated. This includes communicating expectations concerning Pay What You Like, the location of donation points in the museum, and making it easy (if not easier) to make a cashless donation.

5.45 Kirklees Museums & Galleries have implemented a more strategic approach to donations now, including providing training and workshops to front of house at Oakwell Hall; developing clearer and stronger messaging around donations and the *"authenticity of the offer"*; and also in the use of and location of donation boxes and contactless points in the Hall.

5.46 Live Borders reflects on a number of key lessons around charging for admissions and seeking donations from visitors that are important for all their museums, and this includes: *"the importance of messaging to people is key"* – especially around emphasising the charitable status and the benefit of the donation to the museum and the collection.

5.47 When Live Borders originally implemented a more proactive donations ask, there was reluctance from staff, much of which was down to individuals and personalities. It took a real effort to implement it and embed it over the first 6 months, and key lessons include the use of coaching and training – and of using staff that are exemplars of good practice to offer peer group support to others. Other lessons include using quirky donations boxes that are bespoke to the museum offer/collection, and *"giving credit to the staff for driving income"* when reporting on financial performance to the Board. There are challenges for Live Borders around gathering customer data for Gift Aid etc., in a smooth and efficient way that does not inconvenience the visitor experience.

5.48 The Heritage Centre Bellingham have found that having a 'pay what you feel' admissions strategy is easier for the museum, but strongly emphasise that it was important to train the volunteers around the new strategy of asking for donations. The Centre has found that it is easier to ask for donations, and that this model means there are no issues for volunteers to deal with at front of house with those that do not want to pay for admissions: *"it is a much more positive message"*; *"it is much easier for volunteers to do that – there are no difficult discussions at the front desk"*. The Centre also emphasised that you can *"get a pleasant, surprised reaction"* when visitors find out it is free to go in.

5.49 Those museums who take a business led approach to museum sustainability are quite clear that charging provides independence and greater certainty, allows for investment and match funding for project resources, and reduces reliance on public funding.

Annex 1: Summary Of Survey Responses & Key Survey Results

Image credit: Henry Moore

Annex 1:
Summary Of Survey Responses & Key Survey Results

This annex presents more information about the survey of the museum sector that was carried out for this research. This includes a summary of the survey process, considerations about the representativeness of the responses, and presentation of the survey findings for the categorical and quantitative survey questions.

As noted in Section 1 of the report, the survey was a key strand of the research. It was developed and implemented as an online survey, open to all museums in the UK.

The aim of the survey was to adopt a wide-ranging and comprehensive approach to help ensure that the research findings were robust and rigorous in terms of providing sufficient coverage of the museums sector, as well as ensuring that the research was inclusive and transparent in terms of the opportunity for museums to engage in it.

The survey was promoted via various routes, including support from Steering Group organisations as well as a wide range of other museum organisations and networks – all of which helped to engender a good response to the survey.

This included:

- Promotion on social media, in newsletters, emails, on websites, and via one-to-one direct communications with museums by each of the Steering Group members – Association of Independent Museums (AIM) and partners Arts Council England (ACE), Museums Galleries Scotland (MGS), the Welsh Government, the National Museum Directors' Council (NMDC), and the Art Fund.
- Promotion by the study team on social media, via direct emails, and in informal discussions with museums.

Overall, the survey received more than 450 raw responses, and once the data was cleaned, a total of 344 valid replies were used in the analysis. This is an excellent response rate for a survey of this type. Tables A1.1 and A1.2 below show the representativeness of the survey in terms of both the geographic location of respondents (A1.1) and museum type (A1.2).

These tables show that the survey respondents provide a good, appropriately proportioned, mix of the museum sector geographically for England, Wales, and Scotland. In terms of museum type, survey respondents may be over-reflective of independent museums, although given that AIM has been the key commissioner of this research, and strongly supported the promotion of the survey, this is not unexpected.

Information About Your Museum

Table A1.1: Museum Location

Museum Location	Count	Percent
England – London	22	6%
England – Midlands	55	16%
England – North	55	16%
England - South East	95	28%
England - South West	46	14%
Northern Ireland	1	0.3%
Scotland	29	9%
Wales	36	11%
Total	339	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=329)

Table A1.2: Which of the following best describes your museum type?

Museum Type	Count	Percent
Independent	271	73%
LA	28	8%
Ex-Local Authority (now operating as stand-alone trust/arms-length organisation)	21	6%
University	6	2%
National	6	2%
Military	17	5%
Other	21	6%
Total	370	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=370)
Please note: respondents could select more than one option. Also, some respondents that classified themselves as National are nationally-styled rather than National Museums.

Current Admissions Charging At Your Museum

Table A1.3: Which of the following statements best describe the current admissions charging/pricing policy at your museum?

Current Admissions/Charging Policy	Count	Percent
We charge for admissions to specific exhibitions only	15	4%
We charge for both general admissions and admissions to specific exhibitions	28	8%
We charge for general admissions only	176	51%
We do not charge for either general admissions or specific exhibitions	123	36%
Total	342	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=342)

Current Admissions Charging At Your Museum

Table A1.4: Cross tabulation of the current admissions charging/pricing policy at museum by type of museum

	Independent	Local authority	Ex-local authority	University	National	Military	Other	Overall	Count
We charge for admissions to specific exhibitions only	3%	4%	14%	0%	100%	0%	14%	4%	16
We charge for both general admissions and admissions to specific exhibitions	9%	4%	5%	0%	0%	6%	5%	8%	29
We charge for general admissions only	55%	21%	48%	0%	0%	65%	48%	51%	190
We do not charge for either general admissions or specific exhibitions	33%	71%	33%	100%	0%	29%	33%	36%	135
Total	100%	100%	100%	100%	100%	100%	100%	100%	370

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=370)
Please note: as acknowledged in Table A1.2 above, some respondents that classified themselves as National are nationally-styled rather than National Museums. The implication of this for this table is that it originally appeared as though some National Museums charged for general admissions – which is not the case. As such, manual adjustments were made to the results presented in this table, and any related charts in the report, to only include National Museums in the National category and to reclassify nationally-styled as Independent Museums.

Table A1.5: Cross tabulation of the current admissions charging/pricing policy at museum by museum location

	England London	England Midlands	England North	England South East	England South West	Northern Ireland	Scotland	Wales	Count
We charge for admissions to specific exhibitions only	14%	7%	2%	2%	0%	0%	10%	3%	14
We charge for both general admissions and admissions to specific exhibitions	9%	9%	7%	9%	9%	0%	7%	6%	28
We charge for general admissions only	36%	49%	62%	51%	50%	0%	52%	58%	176
We do not charge for either general admissions or specific exhibitions	41%	35%	29%	38%	41%	100%	31%	33%	121
Total	100%	100%	100%	100%	100%	100%	100%	100%	339

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=339)

Table A1.6: Cross tabulation of the current admissions charging/pricing policy at museum by scale of core funder income

	We do not have any core funders	Less than 25% of our income comes from one or two core funders	A notable proportion of our income (25%-50%) comes from one or two core funders	The majority of our income (50%-75%) comes from one or two core funders	The vast majority of our income (75%+) comes from one or two core funders	Overall	Count
We charge for admissions to specific exhibitions only	2%	0%	5%	11%	12%	4%	9
We charge for both general admissions and admissions to specific exhibitions	12%	7%	10%	0%	0%	8%	21
We charge for general admissions only	51%	79%	57%	68%	24%	51%	127
We do not charge for either general admissions or specific exhibitions	35%	14%	29%	21%	64%	36%	80
Total	100%	100%	100%	100%	100%	100%	237

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=237)

Table A1.7: Cross tabulation of the current admissions charging/pricing policy at museum by level of competition for attracting visitors.

	Not at all competitive – very few, or no, other visitor attractions in area	Slightly competitive	Moderately competitive	Very competitive – lots of other visitor attractions in area	Count
We charge for admissions to specific exhibitions only	0%	5%	1%	7%	9
We charge for both general admissions and admissions to specific exhibitions	8%	8%	10%	8%	21
We charge for general admissions only	56%	41%	65%	53%	128
We do not charge for either general admissions or specific exhibitions	36%	46%	23%	32%	79
Total	100%	100%	100%	100%	237
Charge	64%	54%	77%	68%	158
Do Not Charge	36%	46%	23%	32%	79

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=237)

Table A1.8: Cross tabulation of the current admissions charging/pricing policy at museum by significance of visitor economy to local area where museum is located

	Not at all significant	Of minor significance	A moderately significant sector	One of a number of significant sectors	A key sector	Count
We charge for admissions to specific exhibitions only	0%	8%	0%	3%	5%	9
We charge for both general admissions and admissions to specific exhibitions	13%	20%	8%	7%	8%	21
We charge for general admissions only	0%	40%	50%	62%	60%	129
We do not charge for either general admissions or specific exhibitions	88%	32%	42%	28%	27%	79
Total	100%	100%	100%	100%	100%	238
Charge	13%	68%	58%	72%	73%	159
Do Not Charge	88%	32%	42%	28%	27%	79

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=238)

Table A1.9: Cross tabulation of the current admissions charging/pricing policy at museum by importance of museum to visitor economy of local area

	Not at all important	An attraction of minor significance	A moderately significant attraction	One of a number of significant attractions	A key attraction (i.e., a destination museum which draws people into the area)	Count
We charge for admissions to specific exhibitions only	18%	0%	4%	3%	4%	9
We charge for both general admissions and admissions to specific exhibitions	0%	3%	14%	4%	13%	21
We charge for general admissions only	9%	52%	45%	65%	65%	129
We do not charge for either general admissions or specific exhibitions	73%	45%	38%	28%	19%	79
Total	100%	100%	100%	100%	100%	237
Charge	27%	55%	62%	72%	81%	159
Do Not Charge	73%	45%	38%	28%	19%	79

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=238)

Table A1.10: Cross-tabulation of the current admissions charging/pricing policy at museum by size of museum (using 2022 visitor numbers to categorise size)

	Small (up to 20k)	Medium (20k to 50k)	Large (50k-100k)	Largest (>100k)	Average	Count
We charge for admissions to specific exhibitions only	3%	9%	0%	9%	4%	9
We charge for both general admissions and admissions to specific exhibitions	9%	9%	23%	9%	10%	21
We charge for general admissions only	51%	53%	62%	61%	53%	113
We do not charge for either general admissions or specific exhibitions	37%	29%	15%	22%	33%	69
Total	100%	100%	100%	100%	100%	212
Charge	*63%*	*71%*	*85%*	*78%*	*67%*	*143*
Do Not Charge	*37%*	*29%*	*15%*	*22%*	*33%*	*69*

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=212)

Table A1.11: Cross-tabulation of the current admissions charging/pricing policy at museum by proportion of local Visitors to museum

	Proportion of Local Visitors is 50% +		Proportion of Local Visitors is less than 50%	
	Count	Percent	Count	Percent
We charge for admissions to specific exhibitions only	3	3%	4	4%
We charge for both general admissions and admissions to specific exhibitions	12	10%	6	7%
We charge for general admissions only	54	46%	60	65%
We do not charge for either general admissions or specific exhibitions	48	41%	22	24%
Total	117	100%	92	100%
Charge	*69*	*59%*	*70*	*76%*
Do Not Charge	*48*	*41%*	*22*	*24%*

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=209)

Table A1.12: Cross-tabulation of the current admissions charging/pricing policy at museum by dwell time of visitors

At least 50% of visitors report this dwell time:	Charge %	Do Not Charge (%)	Count
Less than 30 minutes	21%	79%	42
Between 30 minutes and 2 hours	70%	30%	126
Between 2 and 4 hours	86%	14%	35
More than 4 hours	100%	0%	7
Average /Total	64% 134	36% 76	100% (210)

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=209)

Please see later in this annex for the results from the pricing benchmarking questions that were asked at this point in the survey but are reported in Section 3 of the report.

Impacts And Experiences Of Changes To Admissions Charging

Table A1.13: Please indicate by ticking the relevant boxes whether your museum has changed its admissions charging position for either general admissions or specific exhibitions in any of the following years:

	Count
Pre pandemic (2018 and 2019) - for general admissions	74
Pre pandemic (2018 and 2019) - for specific exhibitions	15
2020 and 2021 - for general admissions	75
2020 and 2021 - for specific exhibitions	17
2022 - for general admissions	95
2022 - for specific exhibitions	16
None of the above	169
	461
Total	341

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=341)
Please note: respondents could tick more than one category. A small number of respondents ticked 'none of the above' plus another option so their response was corrected.
461 responses were received from 341 respondents.

Table A1.14: What type(s) of change(s) did you make to your admissions charging position? (tick all that apply)

	Count
Moved from free admissions to charging for admissions	18
Moved from charging for admissions to free admissions	29
Introduced an increase in admission prices	114
Introduced a decrease in admission prices	8
Introduced new type(s) of admissions ticket	49
Total	218

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=162) Please note: respondents could tick more than one response, so number of respondents is 162, the number of responses is 218.

Please see later in this annex for the results from the impacts and experiences of changes to admissions charging questions that were asked at this point in the survey but are reported in Section 4 of the report.

Table A1.15: Did you consider making any changes to your admissions charging position?

	Count	Percent
No	112	64%
Yes	63	36%
Total	175	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=175)

Table A1.16: Cross tabulation of the current admissions charging/pricing policy at your museum by did you consider making any changes to your admissions charging position?

	No	Yes	Count
We charge for admissions to specific exhibitions only	50%	50%	6
We charge for both general admissions and admissions to specific exhibitions	50%	50%	6
We charge for general admissions only	47%	53%	62
We do not charge for either general admissions or specific exhibitions	76%	24%	101
Total	64%	36%	175
Charge	*47% (35)*	*53% (39)*	*74*
Do Not Charge	*76% (77)*	*24% (24)*	*101*

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=175)

Considerations About Future Changes To Admissions Charging At Your Museum

Table A1.17: Are you planning to change your admissions charging position/ strategy this calendar year – i.e., during 2023 - for general admissions and/or specific exhibitions?

	Count	Percent
No	236	76%
Yes	76	24%
Total	312	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=312)

Table A1.18: Cross tabulation of the current admissions charging/pricing policy at your museum by plans to change your admissions charging position/ strategy this calendar year.

	No	Yes	Count
We charge for admissions to specific exhibitions only	77%	23%	13
We charge for both general admissions and admissions to specific exhibitions	76%	24%	25
We charge for general admissions only	62%	38%	157
We do not charge for either general admissions or specific exhibitions	94%	6%	115
Total	76%	24%	310

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=310)

Information About Your Museum And Local Context

Table A1.19: Which of the following best describes your museum's position in terms of core funders (e.g., local authority, national funding body, national government, etc.)?

	Count	Percent
Less than 25% of our income comes from one or two core funders	29	12%
A notable proportion of our income (25%-50%) comes from one or two core funders	21	9%
The majority of our income (50%-75%) comes from one or two core funders	19	8%
The vast majority of our income (75%+) comes from one or two core funders	25	11%
We do not have any core funders	143	60%
Total	237	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=312)

Table A1.20: Do you claim Gift Aid on admissions?

	Count	Percent	Percent
No	74	31%	38%
Not Applicable – we are not eligible for the scheme	48	20%	
Yes – the additional 10% scheme	54	22%	28%
Yes – the annual pass scheme	66	27%	34%
Total	242	100%	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=242)

Table A1.21: Does your museum collect information about the demography and diversity (e.g., age, disability, gender, ethnicity, socio-economic classification) of visitors?

	Count	Percent
No	158	67%
Yes	77	33%
Total	235	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=235)

Table A1.22: Cross tabulation of current admissions charging/pricing policy at museum by does museum collect information about the demography and diversity of your visitors?

	No	Yes	Count
We charge for admissions to specific exhibitions only	25%	75%	8
We charge for both general admissions and admissions to specific exhibitions	62%	38%	21
We charge for general admissions only	65%	35%	128
We do not charge for either general admissions or specific exhibitions	77%	23%	78
Total	68%	32%	234

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=234)

Table A1.23: How would you describe the level of competition for attracting visitors in the area where your museum is based?

	Count	Percent
Not at all competitive – very few, or no, other visitor attractions in area	25	11%
Slightly competitive	63	27%
Moderately competitive	77	32%
Very competitive – lots of other visitor attractions in area	72	30%
Total	237	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=237)

Table A1.24: How significant is the visitor economy to the local area within which your museum is located?

	Count	Percent
A key sector	92	39%
One of a number of significant sectors	62	26%
A moderately significant sector	51	21%
Of minor significance	25	11%
Not at all significant	8	3%
Total	238	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=238)

Table A1.25: How important is your museum/attraction to the visitor economy of your local area?

	Count	Percent
A key attraction (i.e., a destination museum which draws people into the area)	54	23%
One of a number of significant attractions	68	29%
A moderately significant attraction	74	31%
An attraction of minor significance	31	13%
Not at all important	11	5%
Total	238	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=238)

Other Admissions Charging Strategies

Table A1.26: Has your museum used, or considered using, dynamic pricing for admissions at your museum?

	Count	Percent
Yes – have used it	4	2%
Have considered using it but not used it yet	44	19%
No	189	80%
Total	237	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=237)

Table A1.27: Has your museum used, or considered using, pay what you can/ pay what you like pricing for admissions at your museum?

	Count	Percent
Yes – have used it	21	9%
Have considered using it but not used it yet	45	19%
No	171	72%
Total	237	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=237)

Table A1.28: Has your museum used, or considered using, charging for virtual/ online access to the museum?

	Count	Percent
Yes – have used it	20	8%
Have considered using it but not used it yet	48	20%
No	168	71%
Total	236	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=236)

Table A1.29: Does your museum use, or has it considered using, specific admissions charging models for school visits to the museum?

	Count	Percent
Yes – have used it	118	51%
Have considered using it but not used it yet	31	13%
No	84	36%
Total	233	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=233)

Table A1.30: Has your museum used, or considered using, any other specific pricing models for admissions beyond what you have already been asked about in this survey?

	Count	Percent
No	182	80%
Yes	45	20%
Total	227	100%

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=227)

Benchmarking Of Admissions Prices

The results outlined below are based on analysis of responses to the question in the survey: "Please use the space below to summarise the current prices you charge for admissions. If it is easier, please provide a website/hyperlink to your current admission prices. In your response, please include all the main tickets you offer – i.e., day visits, annual ticket offers; adult, child, family, discounts/concessions, etc.; general admissions, admissions for specific exhibitions; advance tickets, online tickets, etc."

The responses to this have been analysed to produce pricing benchmarking results overall and by various different characteristics of museums.

Table A1.31: Overall Museum Admission Pricing Benchmarking Results

	Mean (£)	Median (£)	Lower Value (£)	Upper Value (£)	Count
Adult	8.99	7.60	2.00	45.00	210
Concession	7.63	6.60	-	26.00	126
Child (older)	3.64	3.00	-	18.00	204
Child (younger)	0.70	-	-	8.50	198
Family	26.46	24.00	7.00	77.00	105

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=210)

Table A1.32: Museum Admission Pricing Benchmarking Results by Geography (1)

ENGLAND					
	Count	Mean (£)	Median (£)	Lower Value (£)	Upper Value (£)
Adult	170	9.29	8	2	45
Concession	101	8.08	7	0	26
Child (older)	165	3.72	3	0	18
Child (younger)	162	0.65	0	0	8.50
Family	82	27.15	24.10	7	77
SCOTLAND					
Adult	17	8.33	8	4	16.50
Concession	14	6.67	6.25	3	14
Child (older)	16	3.49	3	0	9.50
Child (younger)	16	0.59	0	0	4.50
Family	10	24.70	23	12	49
WALES					
Adult	23	7.25	6.50	2	16.50
Concession	11	4.74	4.50	1.30	12
Child (older)	23	3.17	3.25	0	10
Child (younger)	20	1.17	0	0	8.30
Family	13	23.47	21	10.45	41.30

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=210)

Table A1.33: Museum Admission Pricing Benchmarking Results by Geography (2)

ENGLAND NORTH					
	Count	Mean (£)	Median (£)	Lower Value (£)	Upper Value (£)
Adult	40	8.93	7	2.50	45
Concession	22	6.88	5	2	16.50
Child (older)	40	3.35	3	0	13
Child (younger)	38	0.91	0	0	8.50
Family	20	24.88	24.98	10	58
ENGLAND MIDLANDS					
Adult	37	9.85	8.80	2	23.50
Concession	24	9.26	6.88	3	23.50
Child (older)	37	4.63	4	0	14
Child (younger)	37	0.82	0	0	7.70
Family	23	28.26	25	7	58
ENGLAND SOUTH (LON, SW, SE)					
Adult	93	9.22	8	2	28.50
Concession	55	8.05	7	0	26
Child (older)	88	3.50	2	0	18
Child (younger)	87	0.47	0	0	7.95
Family	39	27.65	23	7	77

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=170)

Table A1.34: Museum Admission Pricing Benchmarking Results by Geography (3)

ENGLAND LONDON					
	Count	Mean (£)	Median (£)	Lower Value (£)	Upper Value (£)
Adult	10	10.9	10	4	17
Concession	7	8.36	8	4	11
Child (older)	7	5.07	6	0	10
Child (younger)	7	0	0	0	0
Family	4	21.88	23.75	10	30
ENGLAND SW					
Adult	27	7.47	5	2	22
Concession	10	4.85	4.25	0	9
Child (older)	26	2.18	0	0	13.50
Child (younger)	26	0.35	0	0	5
Family	8	27.98	20	12	62
ENGLAND SE					
Adult	56	9.76	8	2	28.50
Concession	38	8.84	7	2.50	26
Child (older)	55	3.92	3	0	18
Child (younger)	54	0.59	0	0	7.95
Family	27	28.41	24	7	77

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=93)

Table A1.35: Museum Admission Pricing Benchmarking Results by Type of Museum

INDEPENDENTS					
	Count	Mean (£)	Median (£)	Lower Value (£)	Upper Value (£)
Adult	174	9.05	7.60	2	45
Concession	104	8.28	7.00	0	45
Child (older)	168	3.54	2.98	0	18
Child (younger)	165	0.56	0.00	0	7.95
Family	80	27.56	25.00	7	77
ALL OTHERS (NON IND)					
Adult	36	8.70	7.75	3	17.05
Concession	23	6.33	6.00	3	13.75
Child (older)	36	4.08	4.50	0	8.5
Child (younger)	33	1.41	0.00	0	8.5
Family	25	22.92	22.00	7	41.3
LA/EX LA					
Adult	25	8.14	7.50	3	17.05
Concession	18	5.81	5.88	0	13.75
Child (older)	25	3.48	4.00	0	8.25
Child (younger)	24	0.42	0.00	0	4
Family	13	21.65	20.00	10	41.25
LA ONLY					
Adult	6	6.83	7.25	5	8.5
Concession	4	4.63	4.75	3	6
Child (older)	6	4.17	4.25	3	6
Child (younger)	5	1.40	0.00	0	4
Family	4	17.25	19.50	10	20
EX LA ONLY					
Adult	19	8.55	8.8	3	17.05
Concession	14	6.15	6.3	0	13.75
Child (older)	19	3.26	3	0	8.25
Child (younger)	19	0.16	0	0	3
Family	9	23.61	22	12	41.25

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=210)

Table A1.36: Museum Admission Pricing Benchmarking Results by Core Funding Position

NO CORE FUNDERS					
	Count	Mean (£)	Median (£)	Lower Value (£)	Upper Value (£)
Adult	90	9.28	8	2	25.50
Concession	50	8.59	8	3	23.10
Child (older)	87	3.85	3.25	0	17
Child (younger)	85	0.62	0	0	8.50
Family	47	27.83	25	8	68.50
ANY CORE FUNDING					
Adult	55	10.19	8	2.30	45
Concession	35	9.40	7	1.30	45
Child (older)	54	3.62	2.95	0	18
Child (younger)	52	0.56	0	0	7.70
FAMILY	27	27.46	20	11.75	77
HIGH CORE FUNDING (50%+)					
Adult	17	8.25	8	2.30	15.50
Concession	11	6.21	5.50	1.30	14
Child (older)	16	2.42	1.50	0	7.70
Child (younger)	15	1.48	0	0	7.70
Family	8	22.56	20	12	38.50
LOWER CORE FUNDING (0 TO 50%)					
Adult	38	11.05	8	2.50	45
Concession	24	10.86	7.50	3.85	45
Child (older)	38	4.12	2.95	0	18
Child (younger)	37	0.19	0	0	2.95
Family	19	29.52	21	11.75	77

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=145)

Table A1.37: Museum Admission Pricing Benchmarking Results by level of competition for attracting visitors

Not at all competitive					
	Count	Mean (£)	Median (£)	Lower Value (£)	Upper Value (£)
Adult	16	6.91	5	2	25.50
Concession	8	7.75	5.50	3	23
Child (older)	16	2.25	0.25	0	17
Child (younger)	16	0.34	0	0	4
Family	4	32.16	24.50	11	68.50
Slightly competitive					
Adult	32	9.51	9	3	24.20
Concession	17	9.01	8	3	23.10
Child (older)	30	3.24	1.50	0	13.20
Child (younger)	30	0.47	0	0	4.95
Family	16	29.81	25	8	63.25
Moderately competitive					
Adult	55	9.62	8	2.30	22
Concession	34	7.51	6	1.30	19.50
Child (older)	54	3.70	3	0	14
Child (younger)	51	0.69	0	0	8.50
Family	33	25.08	24.50	10	49.50
Very competitive					
Adult	43	10.06	8.50	2.50	28.50
Concession	27	9.81	9	2	26
Child (older)	42	4.67	4	0	18
Child (younger)	41	0.48	0	0	6
Family	21	29.57	20	10	77

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=146)

Table: A1.38: Museum Admission Pricing Benchmarking Results by importance of museum to the visitor economy of local area

Not at all important					
	Count	Mean (£)	Median (£)	Lower Value (£)	Upper Value (£)
Adult	1	4	4	4	4
Concession					
Child (older)	1	1	1	1	1
Child (younger)	1	1	1	1	1
Family					
An attraction of minor significance					
Adult	17	5.85	5	2	10
Concession	7	6.64	7	3.95	9
Child (older)	17	1.73	1	0	5
Child (younger)	16	0.22	0	0	2
Family	7	15.11	11.75	8	25
A moderately significant attraction					
Adult	44	8.53	7.50	2.50	19.80
Concession	23	7.40	6	3	13
Child (older)	42	3.03	2.75	0	10
Child (younger)	40	0.63	0	0	6
Family	19	22.46	20	10	39
One of a number of significant attractions					
Adult	45	8.93	7.50	2.30	24.20
Concession	30	7.19	6	1.30	23.10
Child (older)	44	3.11	2.73	0	13.20
Child (younger)	44	0.53	0	0	6
Family	21	25.93	24	11	63.25
A key attraction					
Adult	40	12.60	12	3	28.50
Concession	27	11.48	10	2	26
Child (older)	39	6.18	5.50	0	18
Child (younger)	38	0.55	0	0	8.50
Family	28	35.76	31.75	12	77

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=147)

Table A1.39: Museum Admission Pricing Benchmarking Results by Size of Museum

Small (up to 20k)	Adult	Concession	Child (older)	Child (younger)	Family
Mean (£)	7.11	6.15	2.34	0.53	20.30
Median (£)	6.75	5.50	2.00	0.00	20.00
Minimum (£)	2.00	2.00	0.00	0.00	8.00
Maximum (£)	16.50	15.00	8.80	6.00	46.00
Count	86	51	82	79	42
Medium (20k to 50k)	Adult	Concession	Child (older)	Child (younger)	Family
Mean (£)	11.10	9.33	4.97	1.46	30.27
Median (£)	12.00	10.25	6.00	0.00	33.00
Minimum (£)	2.30	1.30	0.00	0.00	11.00
Maximum (£)	18.50	14.00	9.50	8.50	49.00
Count	21	12	21	21	14
Large (50k-100k)	Adult	Concession	Child (older)	Child (younger)	Family
Mean (£)	14.00	12.90	5.70	0.50	39.50
Median (£)	13.50	12.00	5.50	0.00	39.00
Minimum (£)	5.00	8.00	0.00	0.00	30.00
Maximum (£)	22.00	19.50	14.00	5.00	49.50
Count	10	5	10	10	3
Largest (>100k)	Adult	Concession	Child (older)	Child (younger)	Family
Mean (£)	19.19	17.91	10.48	0.00	51.91
Median (£)	19.80	18.73	10.50	0.00	58.00
Minimum (£)	9.90	10.00	0.00	0.00	24.50
Maximum (£)	28.50	26.00	18.00	0.00	77.00
Count	15	10	15	14	11

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=132)

Table A1.40: Museum Admission Pricing Benchmarking Results by Proportion of Local Visitors to Museum

50%+ locals	Adult	Concession	Child (older)	Child (younger)	Family
Mean (£)	10.58	9.73	4.35	0.67	29.01
Median (£)	9.00	8.50	3.25	0.00	25.00
Minimum (£)	2.50	3.00	0.00	0.00	10.00
Maximum (£)	28.50	26.00	18.00	8.50	77.00
Count	63	40	62	61	34
less than 50% local	Adult	Concession	Child (older)	Child (younger)	Family
Mean (£)	8.33	7.03	3.25	0.48	26.73
Median (£)	7.00	6.00	2.50	0.00	24.00
Minimum (£)	2.00	1.30	0.00	0.00	8.00
Maximum (£)	25.50	23.00	17.00	5.00	68.50
Count	67	38	65	62	33

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=130)

IMPACT AND EXPERIENCES OF CHANGES TO ADMISSIONS CHARGING

See overleaf for tables and charts – the tables include all the responses provided to each question, the charts exclude the "Don't know" and "N/A" responses.

Table A1.41: Please answer each of the following questions based on your experiences of the change(s) you have made to your admissions charging position: Introduced an increase in admission prices

	...number of visitors	...demography and diversity of visitors	...total admissions income for your museum	...on-site spontaneous donations	...secondary on-site spend	...dwell-time of visitors	...relationships with stakeholders and funders	...relationships with the local community	...relationships with friends and members
Very positive	14	3	18	4	9	3	2	5	4
Positive	21	14	49	10	13	10	7	11	8
No change	44	53	12	45	49	54	57	54	51
Negative	4	6	7	10	7	2	5	8	12
Very negative	1		1	1					
Don't know	15	22	11	18	13	18	12	13	4
N/A		1		8	5	8	13	4	18
Total	99	99	98	96	96	95	96	95	97

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=114)

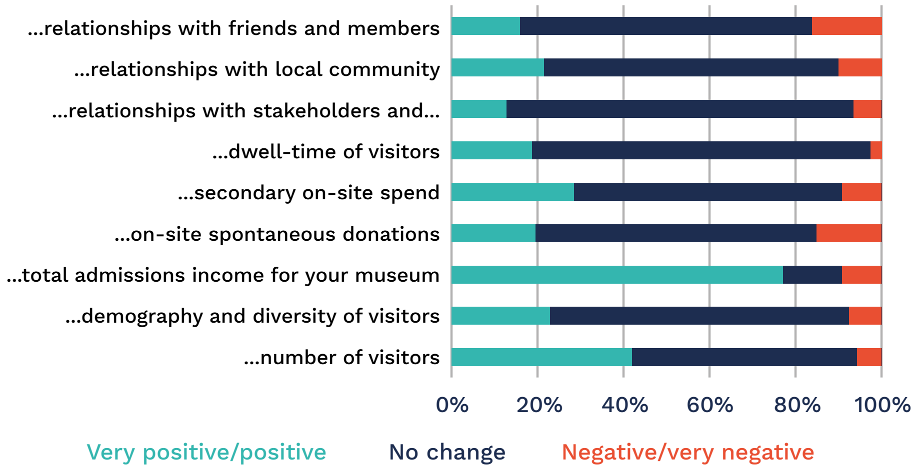


Table A1.42: Please answer each of the following questions based on your experiences of the change(s) you have made to your admissions charging position: Introduced new type of admission ticket(s)

	...number of visitors	...demography and diversity of visitors	...total admissions income for your museum	...on-site spontaneous donations	...secondary on-site spend	...dwell-time of visitors	...relationships with stakeholders and funders	...relationships with the local community	...relationships with friends and members
Very positive	11	4	12	1	7	3	3	7	4
Positive	15	14	21	7	8	3	5	8	3
No change	7	14	5	22	20	24	23	21	18
Negative	2	2	2	3	1	1	4	2	6
Very negative	1		1	1		1		1	
Don't know	8	10	3	9	7	8	5	3	4
N/A				1	1	2	4	2	8
Total	44	44	44	44	44	42	44	44	43

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=49)

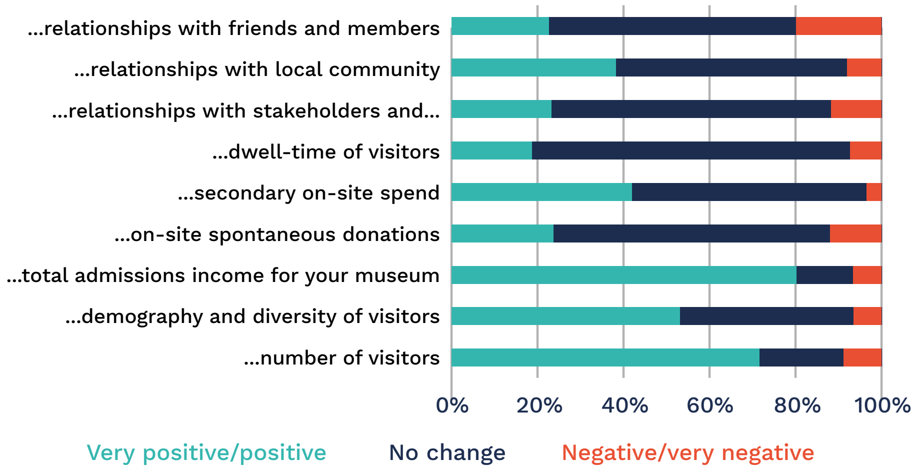


Table A1.43: Please answer each of the following questions based on your experiences of the change(s) you have made to your admissions charging position: Moved from charging for admissions to free admissions

	...number of visitors	...demography and diversity of visitors	...total admissions income for your museum	...on-site spontaneous donations	...secondary on-site spend	...dwell-time of visitors	...relationships with stakeholders and funders	...relationships with the local community	...relationships with friends and members
Very positive	11	4	3	7	5		3	5	4
Positive	7	9	5	9	7	2	3	6	4
No change	3	4	4	5	6	7	11	9	9
Negative			6	1	1	2		1	1
Very negative	1		4		1	1			1
Don't know	2	4	2	2	2	9	2	3	2
N/A		2			2	2	5		2
Total	24	23	24	24	24	23	24	24	23

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=49)

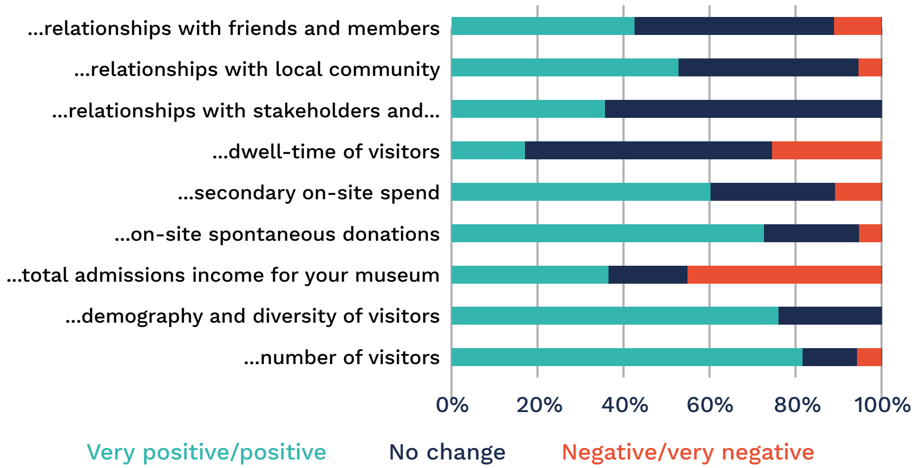


Table A1.44: Please answer each of the following questions based on your experiences of the change(s) you have made to your admissions charging position: Moved from free admissions to charging for admissions

	...number of visitors	...demography and diversity of visitors	...total admissions income for your museum	...on-site spontaneous donations	...secondary on-site spend	...dwell-time of visitors	...relationships with stakeholders and funders	...relationships with the local community	...relationships with friends and members
Very positive	2		9		1	1		1	1
Positive	5	2	3	5	2	5	2	3	3
No change	2	9	3	3	5	9	10	9	10
Negative	5	2	1	5	2		1	3	1
Very negative	2	1		1	1				
Don't know	1	2	1	3	4	1	2		1
N/A		1			2	1	1		1
Total	17	17	17	17	17	17	16	16	17

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=18)

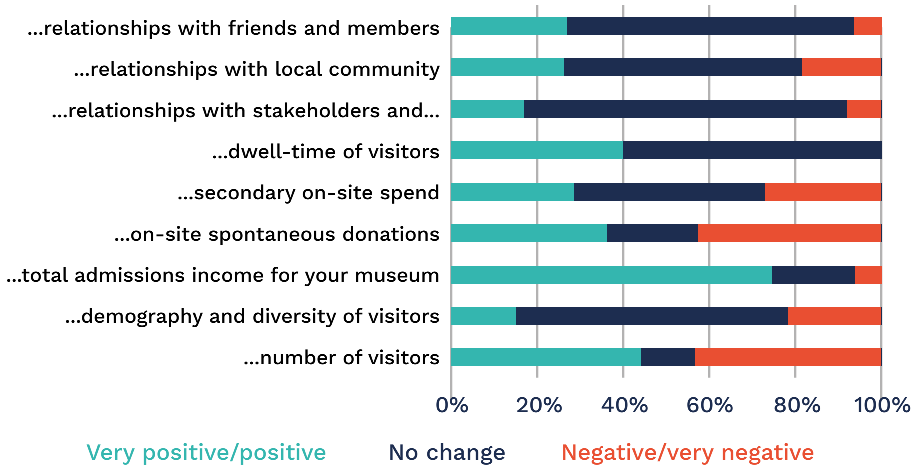
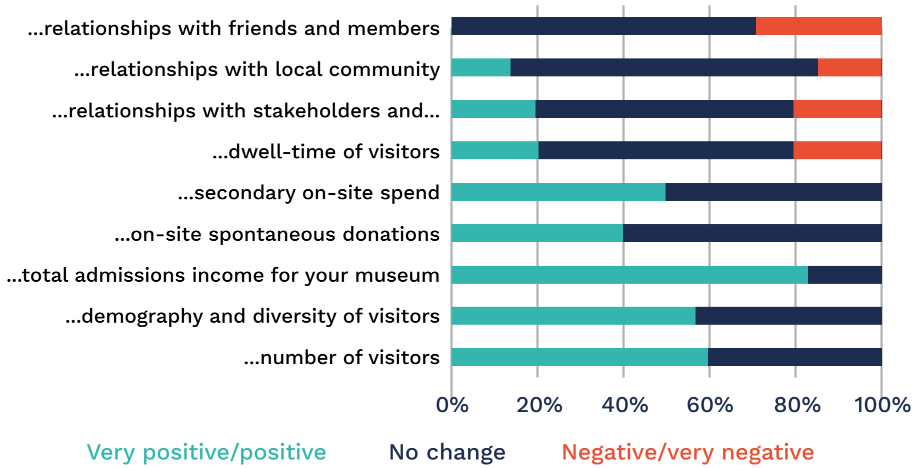


Table A1.45: Please answer each of the following questions based on your experiences of the change(s) you have made to your admissions charging position: Introduced a decrease increase in admission prices

	...number of visitors	...demography and diversity of visitors	...total admissions income for your museum	...on-site spontaneous donations	...secondary on-site spend	...dwell-time of visitors	...relationships with stakeholders and funders	...relationships with the local community	...relationships with friends and members
Very positive	2	1	1	2	1			1	
Positive	1	3	4		2	1	1		
No change	2	3	1	3	3	3	3	5	5
Negative						1	1	1	2
Very negative									
Don't know	3	1	2	2	2	3	1	1	1
N/A				1			2		
Total	8	8	8	8	8	8	8	8	8

Source: DC Research/Durnin Research analysis of survey results, September 2023 (n=8)



Annex 2: Museum Consultees

Image credit: Avoncroft

Annex 2:
List and Summary of Museum Consultees

The table below provides list of the 29 museums that were consulted as part of the Museum Consultations phase of the research.

Museum	Location	Type	Consultee(s)
Avoncroft Museum of Buildings	England	Independent	Zoe Willems
Beamish Museum	England	Independent	Sally Dixon
Biggar Museum	Scotland	Independent	Elaine Edwards
Black Country Living Museum	England	Independent	Andrew Lovatt
Bletchley Park Trust	England	Independent	Jennifer Milton
Brooklands Museum	England	Independent	Tamalie Newbury
Castle Bromwich Historic Gardens	England	Independent	Glynis Powell
Charles Dickens Museum	England	Independent	Cindy Sughrue
Cyfarthfa Castle Museum & Art Gallery	Wales	Independent	Kelly Powell, Chris Parry
Derby Museums	England	Ex-local authority	Alex Rock
Dinefwr, National Trust	Wales	Other (NT)	Alice Sharp, Holly Dwyer
Henry Moore Studios and Gardens	England	Independent	Clare Tomlinson
Ironbridge Gorge Museum Trust Ltd	England	Independent	Kirsty Vlemmiks, David Wright
Isle of Wight Glass Museum	England	Independent	Anton Doroszenko
Kirklees Museums & Galleries	England	Local authority	Ralph Parmar
Library of Innerpeffray	Scotland	Independent	Lara Haggerty
Live Borders Museums & Galleries	Scotland	Ex-local authority	Fiona Colton
National Civil War Centre, Newark	England	Local Authority	Carys Coulton-Jones, Rose Maxwell
National Football Museum	England	Independent/ National	Anthony Willder
Natural History Museum	England	National	Hannah McCartney

Museum	Location	Type	Consultee(s)
Yr Ysgwrn	Wales	Local Authority	Naomi Jones
Rutland County Museum	England	Local authority	Lorraine Cornwall
The Heritage Centre Bellingham	England	Independent	Steve Gibbon
The Historic Dockyard Chatham	England	Independent	Paul Barnard
The Judge's Lodging	Wales	Independent	Gabrielle Rivers
Trimontium Museum	Scotland	Independent	Frances Mann
West Highland Museum	Scotland	Independent	Vanessa Martin, Chris Robinson
Wordsworth Grasmere	England	Independent	Stephanie Byast
York Art Gallery	England	Ex-local authority	Richard Saward

Avoncroft Museum is home to over 30 historic buildings and structures which have been rescued and re-built. The Museum is spread over 19 acres of beautiful Worcestershire countryside and includes period gardens, a traditional cider and perry orchard as well as the collection of historic buildings from medieval to modern. It is also the home of the National Collection of Telephone Kiosks. For more information see: http://www.avoncroft.org.uk

Beamish is an independent museum, located in County Durham. Beamish is a world-famous, open-air museum which brings the history of North East England to life at its 1820s Pockerley, 1900s Town, 1900s Pit Village, 1940s Farm, 1950s Town and 1950s Spain's Field Farm exhibit areas. Visitors to the museum meet costumed folk and discover fascinating stories of everyday life in the region through time. For more information see: https://www.beamish.org.uk/

Biggar Museum is an independent museum, located in the Scottish Borders. Biggar Museum's collections explore 14,000 years of rural and small-town life in Biggar and Upper Clydesdale. They explore the area's rich archaeological, social and historic heritage and focus on the people who have lived and worked here from prehistoric times up to the mid-20th century. The many objects on display illuminate a small part of their ordinary and extraordinary lives. In addition to the museum galleries, the building encompasses an archive room, stores, shop, and a separate area for temporary exhibitions. For more information see: https://www.biggarmuseumtrust.co.uk/

Black Country Living Museum is an award-winning open air museum that tells the story of one of the very first industrialised landscapes in Britain. Set across 26 acres, the museum has carefully reconstructed shops, houses and industrial areas that represent the Black Country's story. Visitors learn how steam power, human ingenuity and an increasingly interconnected world transformed this region into a manufacturing powerhouse. For more information, please see https://bclm.com/

Bletchley Park is an independent museum and heritage attraction near Milton Keynes in Buckinghamshire. It was the principal centre of Allied codebreaking during the Second World War, where, by 1945, 9000 staff worked daily to break enemy codes and ciphers. Visitors to the museum can discover the incredible achievements of Britain's World War Two Codebreakers, in the place where it happened. For more information see: https://bletchleypark.org.uk/

Brooklands Museum occupies 32 acres of the former Brooklands motor-racing track and aircraft factories in Weybridge, Surrey. Visitors can discover the pioneers of speed, flight and adventure at the birthplace of British motorsport, aviation and home of Concorde. For more information: https://www.brooklandsmuseum.com/

Castle Bromwich Hall and Gardens are a 17/18th Century Formal Gardens and Local Nature Reserve Parkland (Grade2*) on the very edge of metropolitan, industrialised Birmingham. Made up of 10 acres of a unique survival of 350 year old early 18th century formal garden design. The walled garden, once part of the Earl of Bradford's estate, rescued, nurtured and owned by an independent Charitable Trust. A further 30 acres of the former estate's historic Parkland, now a Local Nature Reserve, encircles the formal garden. Keeping largely to a period-relevant style with plant species and heritage fruit from 1680-1760 it's like visiting the Baroque countryside in the middle of a 21st century city. For more information, please see https://www.castlebromwichhallgardens.org.uk/

The **Charles Dickens Museum** is the leading centre for the study, appreciation and enjoyment of the life and work of Charles Dickens. The Grade I listed building at 48 Doughty Street, Bloomsbury, is the only remaining family home of Charles Dickens in London and is where he began married life, became established as a writer, and rose rapidly to international fame. The Museum holds the world's most comprehensive collection of material relating to Charles Dickens, from his childhood through to his death, as well as his continuing legacy. In addition to permanent displays, the Museum presents an ongoing series of temporary exhibitions exploring different aspects of Dickens's life and influence. To find out more see: https://dickensmuseum.com/

Cyfarthfa Castle Museum & Art Gallery is an independent museum, located in Merthyr Tydfil. Cyfarthfa Castle Museum & Art Gallery is home to a fantastic collection of artifacts spanning 2,000 years of Merthyr's history. The museum is a testament to the spirit of the working man, Merthyr's spirit and the story which makes Merthyr so important in history for Wales and Britain as a whole. For more information, see: https://wellbeingmerthyr.co.uk/venues/museums/museums/

Chatham Historic Dockyard Trust is the world's most complete dockyard of the Age of Sail and is home to over 100 buildings and structures, including 47 Scheduled Ancient Monuments. The story of the Royal Dockyard at Chatham and its people can be discovered in its immersive exhibition galleries, such as Command of the Oceans and The Ropery. Explore three historic warships to learn about warship construction, refit and repair and examine important objects related to the Dockyard and the wider maritime world from the collections of Royal Museums Greenwich and Imperial War Museums. For more information, please see https://thedockyard.co.uk/

Dinefwr, a National Trust site, is formed of the Historic Newton House surrounded by a National Nature Reserve and 18th century landscape Deer Park. A magical land of power and influence for more than 2,000 years, Dinefwr is an iconic place in the history of Wales. Two forts are evidence of a dominant Roman presence. The powerful Lord Rhys held court at Dinefwr and influenced decisions in Wales. Standing proudly at the heart of the estate is Newton House, a family home for over three hundred years to the descendants of Lord Rhys, the powerful Prince of the Welsh Kingdom of the Deheubarth. For more information see: https://www.nationaltrust.org.uk/visit/wales/dinefwr

The **Henry Moore Foundation** is a registered charity in England, established for education and promotion of the fine arts — in particular, to advance understanding of the works of Henry Moore and set up with a gift from the artist in 1977. Operating from Perry Green in Hertfordshire the Henry Moore Studios and Gardens allows visitors to experience Henry Moore's iconic work with a visit to the artist's former home and sculpture gardens. For more information see: https://henry-moore.org/

Established in 1967, **Ironbridge Gorge Museum Trust** is one of the UK's largest independent museum Trusts and custodian of some of the nation's most significant industrial heritage; including Coalbrookdale, which is regarded as one of the most important historic landscapes in the World. For more information see: https://www.ironbridge.org.uk/

The **Isle of Wight Glass Museum,** which opened in March 2016, has two large galleries, showcasing about 1200 pieces. It also has a well-stocked shop with glass and jewellery, and an extensive library. The main gallery exhibits the largest collection anywhere in the world of glass handmade on the Isle of Wight. The second gallery showcases the Museum's Art Deco and Victorian glass collection. To find out more see: https://www.isleofwightglassmuseum.org.uk/

Kirklees Museums and Galleries is a local authority service that operates four sites in Kirklees, including Oakwell Hall. Oakwell Hall is a Grade I Listed Elizabethan manor house, furnished as a family home of the 1690s, complete with its own mysterious ghost. History comes to life as you explore the fine period rooms, in a building surprisingly unchanged in over 400 years. It offers a real insight into a post-English Civil household. Oakwell Hall is set in over 110 acres of award-winning country park and gardens and includes a visitor centre, gift shop, nature trail, picnic site and playground. For more information, see: https://www.kirklees.gov.uk/beta/museums-and-galleries/oakwell-hall/about.aspx

The **Library of Innerpeffray** is an independent museum located in Innerpeffray in Perthshire. Central to the site at Innerpeffray is The Library: Scotland's first free public lending library founded in 1680. Used by people from the local community until 1968, today you can still read the rare books in its diverse collection and trace the families who took the time to cross the fields in pursuit of knowledge, education or just fun. Regular guided tours are available. For more information, see: https://innerpeffraylibrary.co.uk/

Live Borders is the leisure, sport, and cultural trust for the Scottish Borders. Within Live Borders portfolio there are a range of museums, including the Jim Clark Motorsport Museum. The Jim Clark Motorsport Museum is a brand new and modern attraction, exploring the life of racing legend Jim Clark and his impact on motorsport, with trophies, memorabilia, photographs, film footage and some of the cars in which he raced. There is also Duns Exhibition Room which features a seasonal range of exhibitions within the library building, with a variety of art and local history displays. For more information, please see: https://www.liveborders.org.uk/culture/museums/our-museums/jim-clark-motorsport-museum/

Celebrating the area's rich history of innovation, the **Museum of Making** in the Derwent Valley Mills UNESCO World Heritage Site is a contemporary space telling Derby's 300-year history of making to inspire new creativity. Designed and made by the people and industries of Derby with exhibits, workshops, activities and events, there's something here for everyone including a new café, shop and venue hire space. The museum is located on the former site of Lombe's Mill, a historic silk mill which marks the southern end of the Derwent Valley Mills World Heritage Site. The site opened as Derby's Industrial Museum in 1974 and reopened as the Museum of Making after a major five year redevelopment in 2021. The Museum of Making is managed by Derby Museums Trust, an independent charitable trust responsible for the management of two other museums (Derby Museum and Art Gallery and Pickford's House Museum) in Derby city centre. To find out more see: https://www.derbymuseums.org/museum-of-making/

The **National Civil War Centre & Newark Museum** invites you to explore one of the most fascinating times in UK history, sweeping you into a remarkable story of superstitions, serious sibling rivalry and seismic change which has affected the country we live in today. Visitors can see the realities of 17th century life through the eyes of people who lived it in the Centre's stunning galleries to enjoy a fantastic range of interactives including the Centre's much-loved dressing up cupboard! For more information, see: http://www.nationalcivilwarcentre.com/

The **National Football Museum** is an independent museum located in Manchester. The Museum is now custodian to the world's largest collection of football objects and archives. There are over 40,000 items housed in the Resource Centre in Preston and around 2,500 are on display at the Museum at any one time. The exhibitions programme enables the Museum to showcase the collection through impactful storytelling, and by exploring cultural and creative themes that truly represent the role of football in society and our lives. For more information, see: https://www.nationalfootballmuseum.com/

The **Natural History Museum** is a world-class visitor attraction and leading science research centre on a mission to create advocates for the planet. Within its walls, the NHM is home to 300 scientists and over 80 million collection items spanning the whole spectrum of natural history from the prehistoric period to present day. It is one of three major national museums in South Kensington, all of which are free to enter but also host paid-for temporary exhibitions to support themselves financially. For more information, see: https://www.nhm.ac.uk/

Located in Oakham, **Rutland County Museum** is housed in the Old Riding School of the Rutland Fencible Cavalry. Opening in 1969, the Museum one of two sites run by Rutland Council (the other being Oakham Castle) and houses a collection of objects relating to local rural and agricultural life, social history and archaeology. Temporary exhibitions are shown alongside the permanent displays. For more information, see: https://rutlandcountymuseum.org.uk/

The Heritage Centre Bellingham is a small independent, volunteer-run museum based in Bellingham (in Northumberland). The Heritage Centre tells the stories of the people of the North Tyne and Rede valleys through text, imagery, sound and, of course, objects. The displays present the social, agricultural and industrial history of the area as well as a small section about the earlier Border Reivers. The Museum opened in 1994 in a former garage on the main street in the village and renovated a redundant depot in 2000. Funding in 2008 allowed the Museum to extend the centre to incorporate the Stannersburn Smithy and a new farming gallery. In 2011, another grant from the Heritage Lottery helped buy two historic railway carriages which volunteers restored and fitted out as a tea-room and a flexible learning space. For more information, see: https://bellingham-heritage.org.uk/

The Judge's Lodgings is an independent museum located in Presteigne, Powys. The museum forms part of the Shire Hall in Presteigne, and opened as a museum in 1997 following extensive refurbishment. The museum enables visitors to step into the 1870s and discover the world of a most unusual household, exploring the 'upstairs, downstairs' life of the Victorian Judges, their servants and felonious guests. The core collection the museum cares for are the original furnishings and ephemera from the building itself, supplemented by items that have been loaned, purchased or donated to enhance room settings, helping explain Victorian living, and replacing items the museum knew from inventories were missing. For more information, see: https://www.judgeslodging.org.uk/

The Trimontium Museum is an independent museum in the heart of Melrose in the Scottish Borders. The Museum tells the story of Trimontium, the largest Roman fort and settlement north of Hadrian's Wall, and the interaction between the invading Romans and the native Iron Age tribes they encountered. Pre-dating Hadrian's Wall, and being one of the largest fort sites in Scotland, Trimontium has produced a wealth of important archaeological finds that shine a light into the Roman era in Scotland. For more information, see: https://www.trimontium.co.uk/

The **West Highland Museum** is an independent museum located in Fort William in the Scottish Highlands. The museum was founded in 1922 by a group of Lochaber folk who wished to create a museum for the West Highlands, second to none in Scotland. The museum has operated as an independent museum for over a century with free entry to the museum since 2011. The Museum exists solely to collect, conserve and present items of significance and historical and cultural interest related to the West Highland area. The collections span a wide range of subjects, from archaeology to modern industry, with a special emphasis on the Jacobite risings of the 18th century. For more information, please see: https://www.westhighlandmuseum.org.uk/index.jsp

Wordsworth Grasmere is an independent museum located in Grasmere in the Lake District. In 1799 William Wordsworth arrived in Grasmere aged 29, largely unknown and writing innovative poetry in a new style. Whilst living at Dove Cottage with his family, Wordsworth wrote many of his greatest poems and his sister Dorothy kept her Grasmere journal. The new Museum tells the story of Wordsworth's radical and creative life through a collection of handwritten manuscripts, journals, letters, published poetry and personal items. For more information, see: https://wordsworth.org.uk/

York Art Gallery is part of York Museums Trust, an independent charitable trust that manages the museums and gallery service previously run by City of York Council. Built in 1879 as the venue for the second Yorkshire Fine Art and Industrial Exhibition, the building was purchased by the local authority and re-opened as York Art Gallery in 1892. Since that time, the gallery has developed an outstanding collection of paintings that range from 14th century Western European examples through to 20th century British work. Following a major redevelopment project, the gallery reopened in 2015 with a new Centre of Ceramic Art (CoCA) to showcase its important collection of British Studio Ceramics. For more information, see: https://www.yorkartgallery.org.uk/

Set against the beautiful Snowdonia National Park backdrop, **Yr Ysgwrn** is a traditional Welsh stone farmhouse that has become a national symbol of the losses of the First World War, Welsh-language bardic culture and rural Welsh life. It is best known as the home of the Welsh-language poet, Hedd Wyn, who tragically lost his life in the conflicts of the First World War. For more information, please see https://yrysgwrn.com/

Association of
Independent
Museums

Charity Registration No. 1082215
Company Registration No. 1350939
aim-museums.co.uk