



The Impact of Free Entry to Museums

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The Impact of Free Entry to Museums

Their purpose is not merely to exist, or even to conserve objects for future generations; they are here for everybody's benefit

Background

In recent years, much has been written about the topic of social inclusion in the museum and gallery sector. Of course it is important that the national museums and galleries, set up over a period of many years, should be perceived to be welcoming by all sectors of society. After all, their purpose is not merely to exist, or even to conserve objects for future generations; they are here for everybody's benefit. Since the early 1990s when the majority of the national museums and galleries started charging for entry, there has been a sea change of attitudes in the sector. More and more marketers and managers are ensuring that these institutions have become outward-facing and driven by public demand, rather than inward-looking and conservation focused. To some, this has represented the 'dumbing down' of our museums and galleries, but for many people, this process has dragged these institutions into the twentieth, if not yet the twenty first, century.

It is within this context that the Secretary of State for Culture, Media and Sport pledged a commitment to ensuring free entry for all visitors to our national museums and galleries. And by December 2001, all those of our national museums and galleries which had been charging for admission had returned to a free entry basis.

MORI has been working for many years with a number of national institutions, conducting surveys among visitors, potential visitors, friends, and other stakeholder audiences. At the end of 2001, we found that many of our clients were decidedly uncertain about the future. What impact would going free have? Would those who might be described as 'socially excluded' (on whom museums' funding agreements were often based) be encouraged through the doors? Would the money visitors save on entrance fees be spent in the shops and restaurants? Only time would tell.

In early summer 2002, the answer to one of the questions was well and truly answered – the DCMS announced a 62% increase in visitor numbers in the seven months since entry charges were scrapped. The V&A led the way with a staggering 157% increase (helped, presumably, by the relatively recent opening of the much admired British Galleries). It was reported that a total of 7,031,722 visitors had been to our national museums and galleries between December 2001 and June 2002 – an increase of 2.7 million people year on year. As a researcher, though, one obvious question sprang to mind; did this mean there were a lot more people visiting museums and galleries, or were the same people visiting more frequently?

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MORI decided to dig around, to see what more we could discover about these extra visits. Four questions were placed on the MORI GB Omnibus study between 8th-13th August 2002, asking a representative cross section of the British public about their museum-going habits. It should be stressed, therefore, that the statistics in this paper refer solely to British people – our visitor surveys tend to find that roughly two thirds of visitors to our museums and galleries are British, with North Americans and Europeans making up the majority of the remainder. Clearly, the last two years have been extremely difficult for the British tourism industry, with the foot and mouth outbreak being followed swiftly by the September 11th attacks and war in Afghanistan. Visit numbers to the UK have tumbled (whilst, for a period at least, a proportion of the British population became less confident about travelling to our major cities), so our research is set against a rapidly moving backdrop.

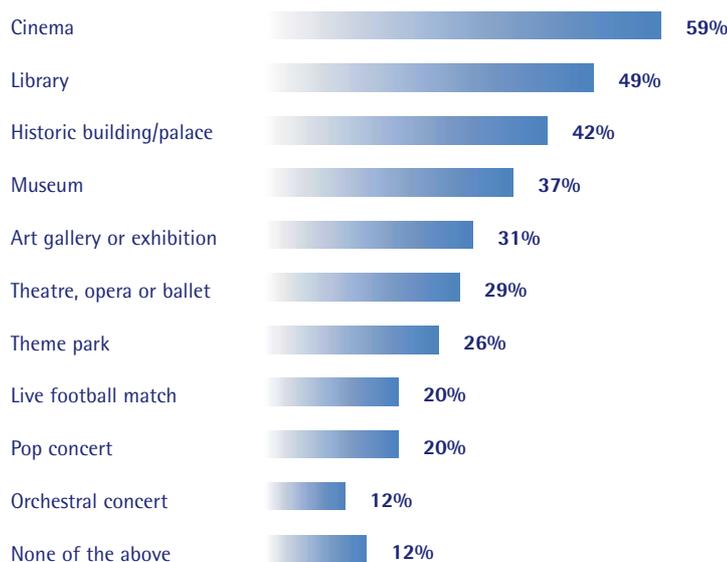
Leisure Visits

45% of the public had been to at least one museum or gallery in the last 12 months

MORI's research discovered a significant increase in the proportion of the British public who had visited at least one museum or gallery in the preceding months. When asked about a variety of leisure attractions, 37% said that they had been to a museum, and 31% had visited an art gallery. Taking into account the crossover of attraction visiting, 45% of the public had been to at least one of either. This represents one of the most popular leisure pastimes, as the chart below demonstrates.

CHART 1 LEISURE HABITS - 2002

Q. Which, if any, of these have you done in the past 12 months?



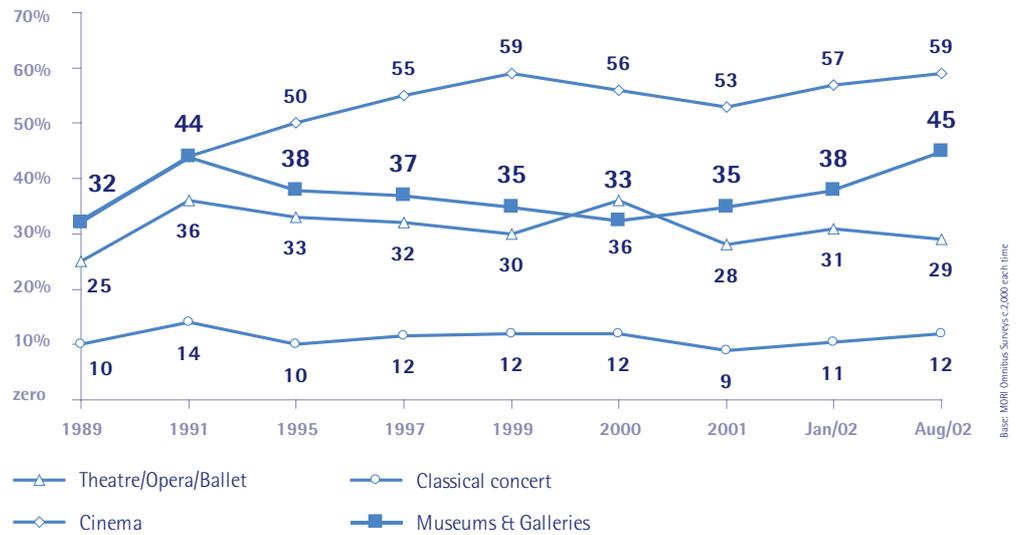
Base: All British adults aged 15+ (2,095), August 2002

MORI has been asking this question (using slightly different comparator activities) over a number of years. Since the late 1980s, for example, we have recorded a steady rise in the proportion of the public who visit the cinema every year – from 32% to the 59% seen above. During this period, museum and gallery visiting has been in the doldrums.

The previous peak was in 1991, at 44%, tailing off to a low of 33% in 2000. Over the last two years, therefore, there has been a rise of around one-third in the proportion of the public visiting a museum or gallery.

The impact of new attractions, such as Tate Modern cannot solely account for this increase – the proportion who had visited a museum or gallery in 2001 had risen just slightly to 35%. The only real change in the sector over this period has been the abolition of entrance charges. As the chart below shows, the increase started immediately – 38% had visited in a museum or gallery when we measured this in January 2002. Meanwhile, other popular activities have continued on a fairly even keel.

CHART 2 LEISURE ACTIVITIES ENJOYED IN LAST 12 MONTHS



Visiting has increased across all age groups – there has also been a rise in museum visiting among those in the DE social classes

So Who is Visiting?

The abolition of entrance charges was designed, above all else, to tempt those who were not in the habit of museum-going, to give it a try. In particular, non traditional museum-going groups, such as social classes D and E, those without higher educational qualifications, and older people, were supposed to be encouraged to visit.

In some ways, it has to be said that the policy has been a staggering success. Visiting has increased across all age groups, for example. In 2000, 28% of all those aged 55 and over said that they had visited a museum or gallery in the previous 12 months, but by 2002, this figure has risen to 43%. There has also been a rise in museum visiting among those in the DE social classes (those where the head of household is an unskilled manual worker) – from 20% in 2001 to 25% in 2002. This is even more pronounced among C2s (skilled manual workers), rising from 28% to 39%.

These increases, though, are not solely responsible for the huge growth in museum visiting. As the table below shows, there have been significant increases among all groups, including those who have always tended to be well-represented in museums and galleries.

CHART 3 PROPORTION OF THE PUBLIC WHO HAVE VISITED A MUSEUM OR GALLERY

	1999 %	2002 %
Total	35	45
15-34	33	43
35-54	42	48
55+	24	43
AB	56	62
C1	39	53
C2	29	39
DE	23	25

Base: MORI Omnibus surveys, total around 2,000 adults aged 15+

Put another way, while the number of people coming through the door might have dramatically increased, the profile of a typical 'population' of museum or gallery visitors has remained relatively stable, and firmly biased in favour of the 'traditional' visitor groups. For example, 18% of the population of Great Britain now have an ordinary or Masters degree, or a PhD. Among museum visitors, this rises to 30%, i.e. three in every ten museum visitors have a degree of some sort. In galleries, this rises even further to 36%. (Conversely, while 26% of the population have no formal qualifications, in museums and galleries, this proportion is just 12%.)

Geography also plays a part, as might be expected. The south of England accounts for 31% of the British population, but 40% of museum visitors, and 43% of those who visit galleries. The further away people live from London – the location of the majority of the national museums and galleries – the less likely they are to visit.

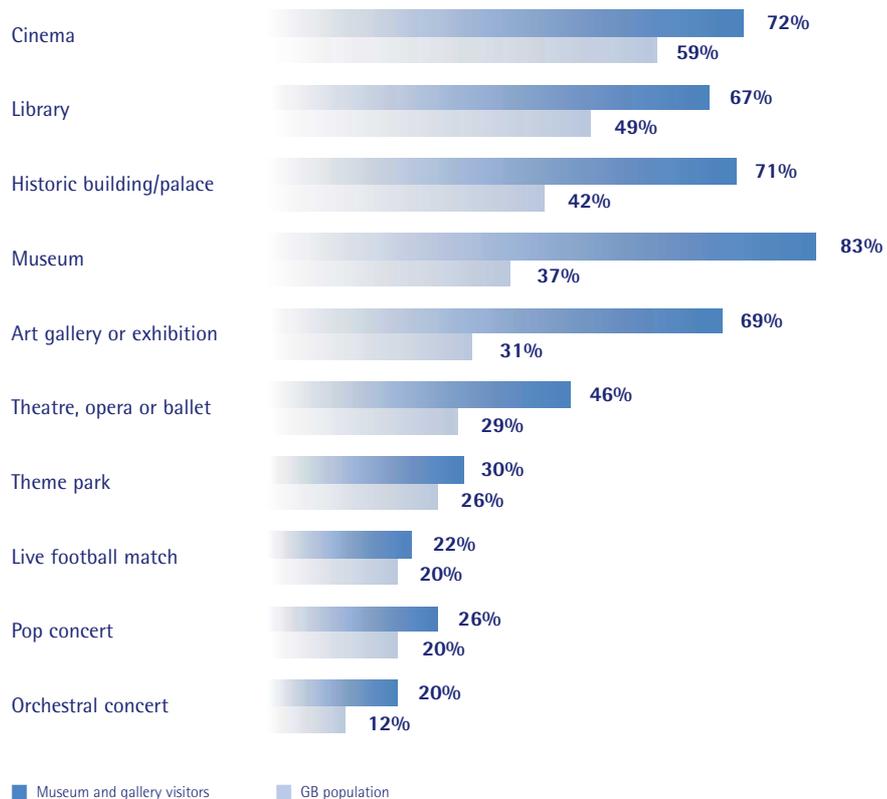
In other ways, though, the profile of visitors does match the population fairly well. Men and women are split fairly equally (49% and 51% respectively in the population at large, compared to 52% and 48% in museums). Those aged 15-34 are just a little less likely than average to visit museums and galleries, whilst the 35-54 age group tends to be marginally over-represented.

It is interesting to note that museum and gallery-goers are generally 'culturally active'. It might be expected that the sorts of people who visit museums or galleries may also be more likely than average to go to orchestral concerts, the ballet, or the theatre.

What is perhaps more surprising, as the chart below shows, is that they are also more likely than average to go to the cinema, pop concerts, and even theme parks.

CHART 4 LEISURE HABITS – MUSEUM & GALLERY VISITORS

Q. Which, if any, of these have you done in the past 12 months ?



Base: All GB population (2,095), August 2002

A total of 7% say that 'I know that admission charges have been scrapped, and have been on a lot more museum and gallery visits this year than I did last year'

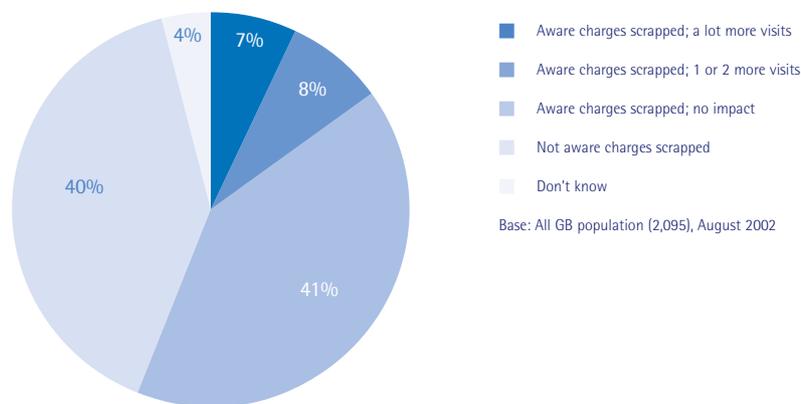
The Impact of Free Entry

We now know that visitor numbers have increased significantly, and that there has been an increase of 10 percentage points in the proportion of members of the public saying that they have visited a museum or gallery in the preceding 12 months. When we ask more directly about their behaviour, it seems that even more claim to have reacted to the reintroduction of free admission. A total of 7% say that 'I know that admission charges have been scrapped, and have been on a lot more museum and gallery visits this year than I did last year'. Another 8% say they have been on one or two more visits this year than last.

On the other hand, as the chart below demonstrates, it is not particularly encouraging to note that two in five members of the public were not even aware of free entry. (However, this could be interpreted as representing a further 18.4 million potential visitors!)

CHART 5 IMPACT OF FREE ENTRY

Q As you may or may not be aware, the admission charge at most of Britain's national museums and galleries were scrapped last December. Please tell me which of these statements best describes your behaviour since then.



Unfortunately for those claiming that free entry has acted significantly to improve social inclusion, the proportions of certain sub-groups within the population who claim to have made more visits as a result of free admission make depressing reading. While 15% of the British public say they have made more visits, this rises to 20% among ABC1s, 21% among people living in the South, and 29% among people with a degree.

Around one in 10 of the general public say that, despite knowing about free entry, they simply have not thought about making a museum or gallery trip

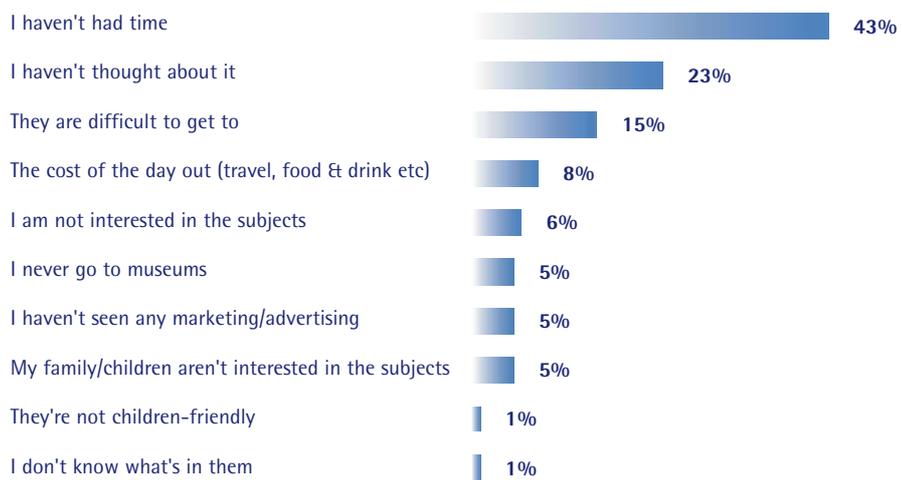
Barriers to Entry

In addition to the 40% of the public who are not even aware that entrance charges have been scrapped, a similar proportion know that the national museums and galleries are free to enter, but have not made any more visits. Among this group, the most common reason given is a lack of time – cited by 43%. It is interesting to speculate, though, on the extent to which this 'lack of time' translates to a lack of interest; after all, if someone cannot make some time over a seven-month period to visit a museum or gallery, then it can probably be assumed that they are not all that excited about the idea. A further 23% of this group (or around one in 10 of the general public) say that, despite knowing about free entry, they simply have not thought about making a museum or gallery trip.

Transport and money issues do still prevent some people from visiting (predominantly DEs, those without formal qualifications, and people living in the north of England), but, as the chart below shows, the implication would appear to be that for the majority of non-attendees, museums and galleries simply do not appeal all that much.

CHART 4 WHY NOT VISIT MUSEUMS OR GALLERIES?

Q. Which, if any, of these reasons describe why you have not made any more museum or gallery visits, despite admission charges being scrapped?



Base: All aware of free entry, but who have not made more visits (830) August 2002

Whether this means that museums and galleries should stop trying to convert those who have so far shown no interest, or that they need to completely revamp their outlook in order to gain wider appeal, is a moot point. It may be worth stressing, though, that our most popular out-of-home leisure activity (apart from shopping) – the cinema – still only attracts about three in five people in a 12-month period. At the end of the day, people are all different, and it should not be expected that we will all be interested in the same things.

47% say that they will spend more on different aspects of their trip to a museum or gallery than they would have done when they had to pay for admission

Impacts on Behaviour

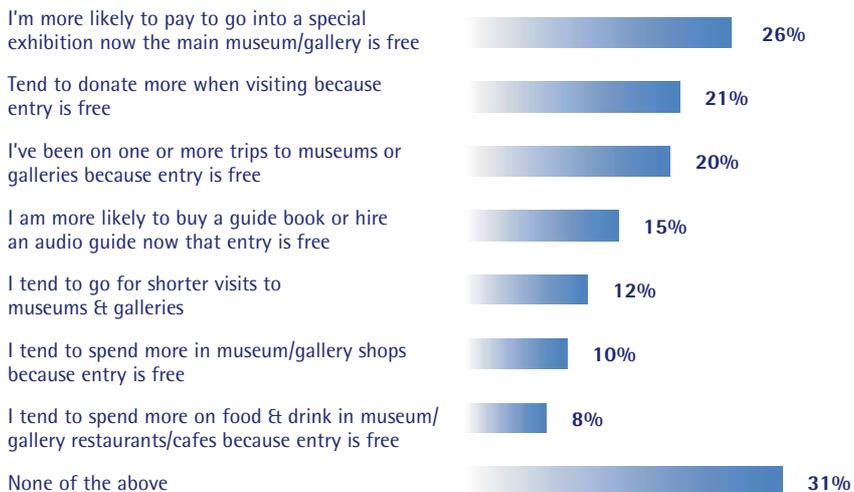
So what about the group who do go to museums and galleries? What are they doing differently now to this time last year? Encouragingly for those attractions charging for entrance to special exhibitions, one in four (26%) say that they are now more likely to pay to go into an exhibition. One in five (21%) will donate more, and one in seven (15%) are more likely to buy a guide book or hire an audio guide. In fact, 47% say that they will spend more on different aspects of their trip to a museum or gallery than they would have done when they had to pay for admission. This is higher among:

- ABs: 57%
- People living in the south of England: 58%
- Women: 60%
- 15-34 year olds: 60%
- People with degrees: 60%

Turned on their head, of course, it is perhaps a little dispiriting to learn that more than half of visitors are not spending any more money in museums and galleries even when they get in for free – for many people it seems that perhaps 'free entrance' equates to a 'free trip' altogether.

CHART 7 SO WHAT HAS CHANGED?

Q. Which, if any, of the following statements describe how your behaviour has changed regarding museum and gallery visits since admission charges were scrapped last December ?



Base: All who are aware of free entry, and who have visited at least one museum or gallery in the last 12 months (684) August 2002

The previous chart shows general behavioural changes. It is interesting to note that just one in five of those who know about free admission, and who have been to a museum or gallery recently, say that this was purely because they knew that entrance was free. Perhaps the simple act of removing the admission charges to museums and galleries has made people start to consider visits when previously they would have done something else?

Implications

So what can we conclude from these statistics?

Clearly the number of people coming through the doors of Britain's national museums and galleries has increased significantly since 2001. While this vindicates the removal of entrance charges, in that the institutions have been 'opened up' to a larger proportion of the British general public, two distinct concerns remain.

People with a degree are almost four times as likely as those with no formal qualifications to say that they know charges have been scrapped and have made more visits as a result

First, although there has been a rise in visiting among those who might be described as being 'socially excluded', the most significant impact on visiting appears to have been among those groups who traditionally have always gone to museums and galleries. People with a degree are almost four times as likely as those with no formal qualifications to say that they know charges have been scrapped and have made more visits as a result. The issue which will continue to face museums and galleries is the extent to which they should concentrate on trying to persuade the remaining 'absentees' to come through the door, or to focus on their current, committed audiences.

A large proportion of visitors are not spending any more inside museums and galleries than they did when they had to pay to get in

Second, as the Director of the Natural History Museum recently pointed out, the increase in visitor numbers brings its own pressures. A large proportion of visitors are not spending any more inside museums and galleries than they did when they had to pay to get in. Funding agreements need to be set in place which will not, therefore, penalise those institutions which are successful in attracting more visitors, as they have been encouraged to do. The only viable alternative, it seems, would be an early return of entrance charges.

One thing is sure, while museums and galleries remain among the most popular leisure activities in this country, the debate about the way ahead will go on for the foreseeable future.

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