

Visits to museums and galleries

On 13 March 2001, *re:source*, the Council for Museums, Archives and Libraries, published the second in the series of reports commissioned from MORI to investigate the profile of visitors to museums and galleries in the UK. Peter Hasler of MORI explains the aims of the ongoing research being conducted for *re:source*, and summarises the main findings contained in the report concerning overall visitation trends, the core visitor market, and the attitudes of schoolchildren towards museums and heritage destinations. Neville Mackay, Chief Executive of *re:source*, comments on the report's findings.

Visitors to Museums & Galleries in the UK reports the findings of research conducted by MORI on behalf of *re:source*. Two research studies were undertaken. The first, conducted in November and December 1999, involved research designed to track the UK public's museum and gallery visiting habits, following a similar study carried out during February 1999. The second, conducted between January and February 2000, concerned the attitudes of schoolchildren in England and Wales towards museums and galleries.

The research forms part of an ongoing project to monitor public attitudes towards museums in the UK. The main objectives of the ongoing study are:

- To regularly monitor the public and acquire information on issues such as:
 - who is visiting museums and who is not
 - what visitors like and don't like about museums
 - how museums relate to other visitor attractions in the public perception
 - how much time and money visitors spend in museums.
- To provide an authoritative picture of the trends in audiences for, and attitudes to, museums across the UK.
- To test attitudes of schoolchildren towards museums and galleries and explore the best ways of attracting them to museums and galleries in the future.

OVERALL VISITATION TRENDS

Popularity of museums and galleries

The results from this study indicate a short-term decline in the proportion of the UK public who visit museums or galleries. Twenty-eight per cent of the UK public visited a museum or gallery between November 1998 and November 1999, compared with 35 per cent the previous year. Despite this, a higher proportion of the public still visits museums and galleries than almost all other types of event or places to visit. The apparent decline in the proportion of

Visits to destinations in the past twelve months

Base:All	All	All	Change +/-
	Nov/Dec 99 (4,461) %	Feb 99 (2,454) %	
Cinema	52	59	-7
Museum/art gallery	28	35	-7
Well known park or gardens	28	36	-8
Stately home/castle/palace	25	32	-7
Theme park	25	28	-3
Theatre/opera/ballet	24	30	-6
Famous cathedral or church	23	32	-9
Zoo/wildlife park/reserve	23	33	-10
Live sporting event	23	26	-3
Pop/rock concert	16	16	-
Classical concert	9	12	-3
None of these	20	16	39

Source: MORI

visitors to museums and galleries is matched by decreases for most other types of attraction, including well-known parks or gardens (-8% points), stately homes/castles/palaces (-7% points) and cathedrals and churches (-9% points). Although museums and galleries are visited by a higher proportion of the population than other forms of entertainment attractions, the gap appears to be closing. The popularity of pop concerts remained unchanged, with no change in the proportion of people who had visited (16%), while theme parks and live sporting events only experienced very small decreases in popularity (both down by 3%). The cinema remains the one 'comparable' leisure activity which is more popular than museums and galleries. Despite an apparent decrease in the proportion of people who visit cinemas, the long-term trend through the 1990s has been upwards, due largely to the growth in multiplex cinemas. The results from this latest research suggest that, while the number of cinema-goers may not be increasing, they are perhaps visiting more frequently.

A competitive marketplace

Although there are no clear reasons for a decrease in the proportion of those surveyed visiting museums and galleries, it is likely that it is due to a combination of factors, many of which have long-term implications for the popularity of heritage-related attractions in general:

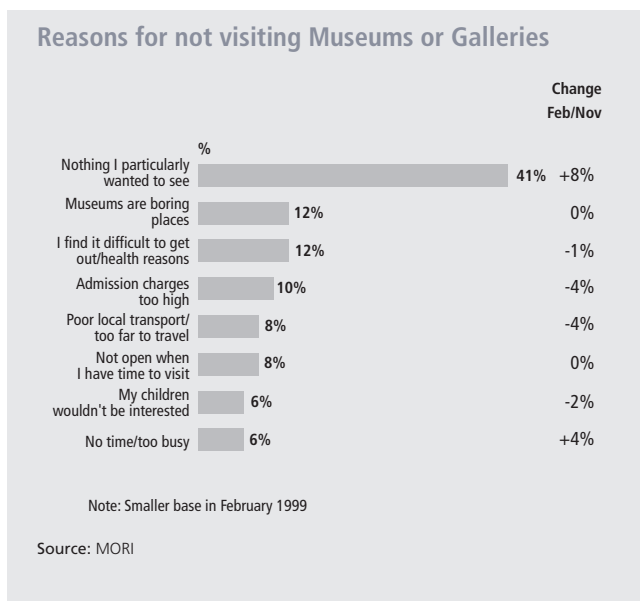
- In the face of strong competition from overseas, fewer people are going on domestic holidays; as 45% of visitors to museums and galleries state that they go when they are on a holiday or short break in the UK, any decrease in domestic holidays will have a knock-on effect on museum and gallery visits.
- Increased competition in the leisure market; computer games, the internet, eating out, health and fitness clubs and Sunday shopping have all increased in popularity in recent years – reducing the time available for other leisure activities.
- Reduced leisure time; as we enter the new millennium, average leisure

time still appears to be decreasing (despite widespread predictions to the contrary). Recent research by Henley Centre Leisure Tracking Surveys indicates that, in the UK, the number of non-working hours has decreased by 100 hours per year over a four-year period.

- 1999 was a pre-millennium year when many museums and galleries were saving new major exhibitions until 2000, while, in a similar way, the public may also have been 'holding back' until the new millennium.

Barriers to visiting

The reasons given for not visiting museums and galleries have changed little since the previous survey in February 1999.



The main difference is in the proportion of people who think that they contain 'nothing they particularly want to see' (41% compared with 33% in February 1999). This appears to be a particularly frequent response among the Scottish public (59% gave it as a reason) and younger people (16- to 24-year-olds, students, and 25- to 34-year-old adults with no children).

The only other response which increased significantly was the proportion of people who stated that they had no time or were generally too busy. Although the percentage remains small (6%), this still represents an increase on the proportion who referred to this in February 1999 (2%). While it is obvious that most people will have had the time to visit a museum or gallery during the course of a year, this perhaps suggests that an increase in other leisure activities during the period (such as internet use and Sunday shopping) has left people with less 'free' leisure time generally.

Admission prices appear to be an increasingly important issue among London residents, a fifth of whom referred to it as a reason for not visiting (21% compared with 13% in February 1999).

CONCLUSION:

Museums and galleries remain in the top range of destinations in the UK, with just under three in ten residents having visited at least once during 1999. Despite this, results from this study and previous research conducted during the 1990s appear to indicate a decrease in the proportion of the UK population who visit all types of heritage attractions.

THE CORE VISITOR MARKET

Visitors

Students remain the most likely section of the public to visit museums and galleries: 37% had visited in the 12 months up until November/December 1999. One-third of people aged between 25 and 64 (without children) had visited a museum or gallery during the same period. However, all of the life stages analysed decreased in the proportion of people who visited museums and / or galleries, with the largest decrease among adults with children.

Visits

Although students are those most likely to visit museums and galleries, this does not mean that they account for the highest proportion of actual visits. To estimate this, it is necessary to take into consideration:

- the proportion of people in each life stage who make a visit;
- the frequency of their visits;
- the proportion of the UK population represented by people in that life stage.

As can be seen from the table below, although students are those most likely to visit museums and galleries, the fact that they visit less frequently than average and represent only 4% of the population, means that they only account for around 5% of all visits.

At 16%, older adults (aged 65+) account for the largest proportion of visits to museums and galleries, with people aged between 45 and 64 accounting for a further 14%-15%. This clearly illustrates the dependence of the market on over 45-year-olds, who visit museums and galleries after their children have left home.

Visits to Museums and Galleries — Life Stages

	% of UK population	% of visitors to museums and galleries	Average frequency of visits p.a.	Estimated % of all visits
Base:All (4,461)	%	%		%
Adults 65+	19	15	2.97	16
Adults 55-64	11	14	3.10	15
Adults 45-54	11	13	3.22	14
Adults 25-44 (with children aged 5-10)	14	14	2.59	13
Adults 25-34	9	10	3.00	11
Adults 25-44 (with children 4 or under)	12	9	2.55	8
Adults 35-44	5	7	3.20	7
Young adults 16-24	9	9	2.46	7
Adults 25-44 (with children aged 10+)	8	7	2.42	6
Students	4	6	2.49	5
Young adults 16-24 (with children)	7	4	2.53	4

Source: MORI

Despite apparent decreases in the family market, visits by adults with children aged between 5 and 10 still represent a significant proportion of all visits to museums and galleries (13%).

CONCLUSION:

Despite an overall decrease in the proportion of people visiting museums and galleries, the core market remains similar to that identified during previous research – students and ABs between 45 and 65 remain the most likely people to visit. Family groups means are now less likely than average to be museum and gallery visitors.

ATTITUDES OF SCHOOLCHILDREN

Use of museum websites

The Science Museum website is the museum/gallery website most visited by schoolchildren (14% have visited), followed by those of the Natural History Museum (13%) and British Museum (10%). The age of the pupil and the type of school they attend appears to have little impact on their propensity to visit specific museum websites. However, their ethnic origin does appear to have an influence, with ethnic minority children more likely to have visited a museum website than white children (34% of ethnic minority children had used at least one of the sites listed, compared with only 25% of white children).

Learning outside school

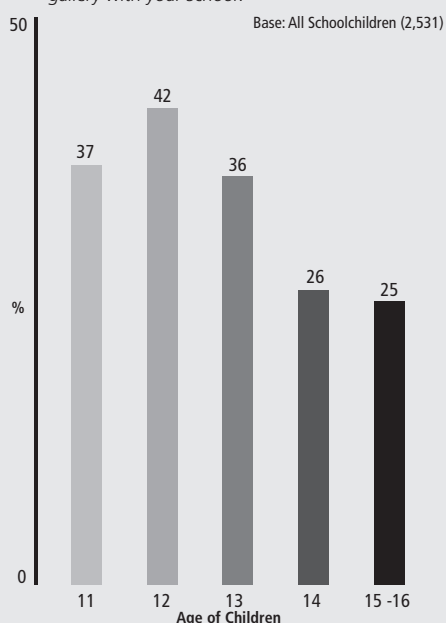
Seven out of ten schoolchildren believe that a library is one of the best places to learn outside school, followed by the internet (62%) and TV and videos (50%). Just under three in ten schoolchildren consider local museums/galleries and national museums/galleries good places to learn outside school (29% and 28% respectively). More schoolchildren consider libraries to be the best place to learn outside school (38%), with around one-quarter (23%) considering the internet to be the best place. Interestingly, although ethnic minorities appear more likely to have used the internet to visit museum and gallery websites, they are less likely than white children to think that the internet is the best place to learn outside school (19% and 24% respectively). Although the internet is still less popular than libraries as a source of learning, its potential cannot be ignored. Current growth rates suggest that each week around 12,000 people in the UK use the internet for the first time.

Visits outside school time

One-third of schoolchildren go back to museums and galleries that they have visited with their school.

Propensity of school children to revisit Museums or Galleries

Q: Have you ever chosen to go back to a museum or gallery with your school?



Source: MORI

Most children revisit with their parents (70%) and/or brothers and sisters (35%). However, as would be expected, the propensity to do so decreases with age (80% of 11-year-olds visit with their parents, compared with only 62% of 15- and 16-year-olds). Children from ethnic minorities are also less likely to visit with their parents (only 43%, compared with 70% of all schoolchildren), but more likely to visit with an organised group (24%, compared with 13% overall).

Museum displays and facilities

Overall, schoolchildren appear to find a very wide range of suggested improvements to museums and galleries appealing (see table below). High-tech facilities at museums and galleries are popular with schoolchildren, with around three in five stating that interactive computer games (61%) and internet access (58%) make their visits more enjoyable. Being able to handle display objects and play with working models are also very popular (58% and 54% respectively).

When asked to choose the thing which they would most like, computer games and being able to handle display objects were the most popular (both mentioned by 11% of schoolchildren).

Things that would make visits to Museums and Galleries more enjoyable

	All responses %	Which ONE would you most like %
Base: All (2,531)	%	%
Interactive computer games about the objects on display	61	11
Internet access	58	9
Handle the objects on display	58	11
Working models which young people can use	54	6
A shop selling the sorts of things young people want to buy	53	3
More places to sit and talk	51	3
Staff available to answer questions etc	51	6
Actors in the museum	44	6
Art and craft materials for use during your visit	43	4
Display objects in the setting they would have been found	40	1
Dance and drama programmes for young visitors	40	8
Other young people to guide you around the museum	36	3
The opportunity to be involved in organising displays/producing labels/writing about the objects on display	31	2
Other	3	
Don't know/not stated	16	

Source: MORI

Other research areas

The surveys conducted also investigated the life-stage profiles for all visitors to museums and galleries, as well as the volume of visits both by region and by social class and ethnicity. The full results on these matters are published in the report.

CONCLUSION:

More than one-quarter of schoolchildren have visited a museum or gallery website (27%). One-third have been back to a museum or gallery they have visited with their school. Computer games/internet access and being able to touch museum objects/working models are the most common suggestions for making museums and galleries more enjoyable.

KEY CONCLUSIONS

The future

Research among schoolchildren suggests that they still have a relatively positive attitude towards museums and galleries. However, the aim in future years must be to increase the proportion of children (now 33%) who return to museums and galleries that they have visited with their school. In order to do this, museums and galleries have to continue to evolve, not just on-site but also through audience development and marketing generally. Use of the internet is an obvious method which needs to be developed further.

Despite the generally positive response from schoolchildren, heritage attractions, including museums and galleries, appear to have experienced a decline in popularity in recent years. Although this report has suggested some possible explanations, the research has not fully addressed why this has happened.

The fact that declining appeal is not just a problem for museums and galleries but for the whole heritage sector suggests that the answer lies in a change in the public's attitude towards their leisure time as a whole. While it is possible that recent results are just a blip, the fact is that museums and galleries are not just in competition with other attractions and events, but with a whole new string of leisure activities.

Reaction from re:source

Commenting on the report's findings, Neville Mackay, Chief Executive of re:source, said: 'The good news is that the survey shows one-third of children visiting a museum or gallery with their school choose to make a return visit. This is highly significant. But this is tempered by worrying evidence that the total volume of museum visits is continuing to decline, which is clearly a cause for some concern. We recognise the importance of ongoing research both for advocacy purposes and in order to inform the development of our sector, and we are committed to creating a significant body of research and other evidential material; re:source will therefore continue to produce an annual visitor survey which, from next year, will also cover libraries and archives.'

Copies of *Visitors to Museums & Galleries in the UK* are available free of charge from Sarah Woodward on 020 7273 1458 or email sarah.woodward@resource.gov.uk. Alternatively the full report is available on the re:source website at www.resource.gov.uk/reports/mori3.pdf

METHODOLOGY

Adults

The research questions were placed on MORI's and UMS' Omnibus surveys (two waves in Britain and one wave in Northern Ireland). In Great Britain, a nationally representative quota sample of 4,461 adults was interviewed by MORI/Field Et Tab. In Northern Ireland, a representative sample of 550 adults was interviewed by UMS (Ulster Marketing Surveys). Interviews in Britain were carried out face-to-face in respondents' homes using CAPI (Computer Assisted Personal Interviewing) between 20–30 November and 2–7 December 1999. Fieldwork took place between 20–27 November in Northern Ireland. Data were weighted to reflect the national population profile.

Schoolchildren

The sample of schools comprised 256 middle and secondary state schools in England and Wales. The sampling universe included county, voluntary aided/controlled and grant-maintained schools, but excluded special schools and 6th form colleges. This sampling frame was stratified by the nine Government Standard Regions (GSRs), and within each stratum, schools were selected proportional to the size of the school register, thus producing a nationally representative sample of secondary and middle schools.

The age groups included in the survey were 11- to 16-year-olds in curriculum years 7 to 11. Each school was randomly allocated one of these curriculum years, from which MORI interviewers selected one class at random (using a random number grid) to be interviewed. Interviewing was carried out through self-completion questionnaires with the whole class in one classroom period. A MORI interviewer was present to explain the survey to pupils, to reassure them about the confidentiality of the survey, to assist them in completing the questionnaire, and to collect completed questionnaires. In classes where four or more children were absent during the self-completion session, up to two follow-up visits were arranged to interview absent pupils.

Fieldwork for the study was conducted between 17 January and 29 February 2000. Of the 256 schools approached, 24 declined to participate at the invitation stage (a letter sent to the headteacher) and a further 117 schools refused to participate during the fieldwork period. In total, 115 schools participated, giving a response rate of 45%. Overall, fully completed questionnaires were obtained from 2,531 pupils, an average of 22 pupils per class.