MORI

Visitors to Museums & Galleries in the UK

Research Study Conducted for:

Resource: *The Council for Museums, Archives and Libraries*

re:source The Council for **Museums Archives and Libraries**

February 2001

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Foreword

This is the second in a series of reports commissioned from MORI to investigate the profile on visitors to the United Kingdom's museums and galleries. It has now been published by MORI on behalf of Resource: The Council for Museums, Archives and Libraries.

The need to increase access to museums and galleries forms an important element of Resource's work and this latest survey features a special section examining visits of school age children to museums and galleries in England and Wales. The fact that one third of children visiting a museum or gallery with their school choose to make a return trip is highly significant. It testifies to the importance of working with schools as a means of developing new audiences and provides valuable advocacy evidence reinforcing the value of museums.

In the general report there is evidence to suggest that the total volume of museum visits is continuing to decline, a trend consistent with attendances at other heritage attractions. However, this is only the second survey in the series, and it is perhaps too early to assess whether or not this is a long-term trend. The research does, however, go beyond the issue of how many people visited our museums. It explores equally important issues such as "who visits" and what they get out of the visit. Museums and galleries are one of the most popular cultural and learning activities in the UK and the quality of services provided continues to rise year after year.

Resource recognises the importance of on-going research both for advocacy purposes and in order to inform the development of our sector. We are therefore committed to create a significant body of research and other evidential material relating to our sector. With this in mind we will continue to produce an annual visitor survey which, from next year, will also cover libraries and archives. The first edition will be published in 2002.

Neville Mackay
Chief Executive, Resource: The Council for Museums, Archives and Libraries

Introduction

Background and Objectives

This report presents the findings of research conducted by MORI on behalf of Resource: The Council for Museums, Archives and Libraries. 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 on-going 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.

Methodology

Visitors to Museums & Galleries – MORI Omnibus

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 & Tab. In Northern Ireland a representative sample of 550 adults were 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 20th – 30th November and 2nd – 7th December 1999. Fieldwork took place between 20th – 27th November in Northern Ireland. Data have been weighted to reflect the national population profile. (Further details of the MORI Omnibus are appended.)

Attitudes of Schoolchildren – MORI's National Schools Omnibus

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 11-16 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.

Data were weighted using a cell weight matrix of gender by age within government standard region. The weights for age, sex and region were derived from data supplied by the Department for Education and Employment and the Welsh office. The data on age were accurate for January 1999. The effect of weighting is shown in the sample profile in the Appendices and in the computer tables.

Demographic information such as age, family composition and the ethnic origin of the children was collected in the survey. Any statistically significant difference is highlighted in the report.

Publication of the Data

MORI Standard Terms and Conditions apply to this study. No press release or publication of the findings of this survey shall be made without the advance approval of MORI and Resource. Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

Visitors to Museums & Galleries

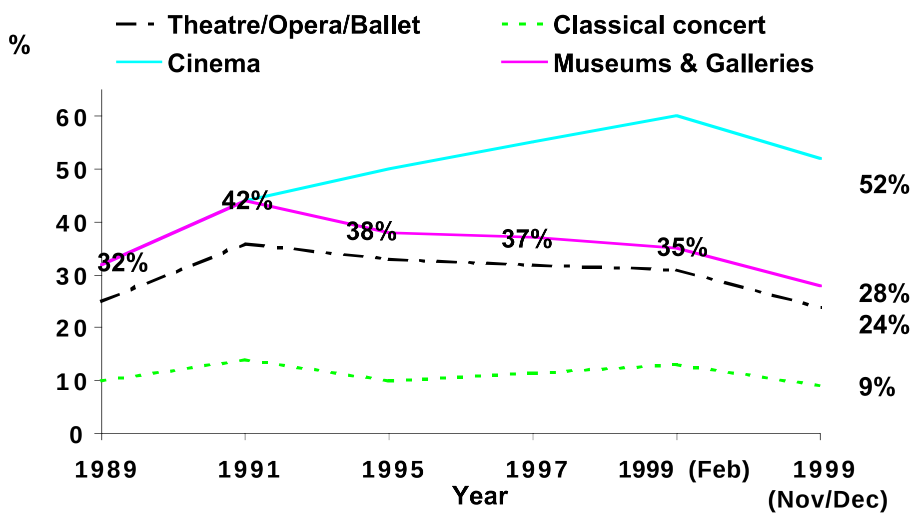
Museums & Galleries

Popularity of Museums and Galleries

Museums and galleries remain in the top range of attractions 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 appears to indicate a decrease in the proportion of the UK population who visit all types of heritage attractions.

Twenty-eight per-cent of the UK public had visited a museum and/or gallery in the 12 months prior to the survey, compared with 35% who had done so when the previous wave of research was conducted in February 1999.

Places to visit/events - trend data



Note: 1997 estimates for cinema/concert/theatre.
Pre-1999 Theatre/opera/ballet = Theatre

Source: MORI

The results from this study indicate a short term decline in the proportion of the UK public who visits museums or galleries. Despite this, a higher proportion of the public visits museums and galleries than almost all other types of event or places to visit.

The apparent decline in the proportion of 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).

Visits to places or events in the past 12 months			
	All Nov/Dec 99	**All Feb 99**	**Change +/-**
Base: All	*(4,461)*	*(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	

Source: MORI

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 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, **less 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 museums 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 across a four-year period.

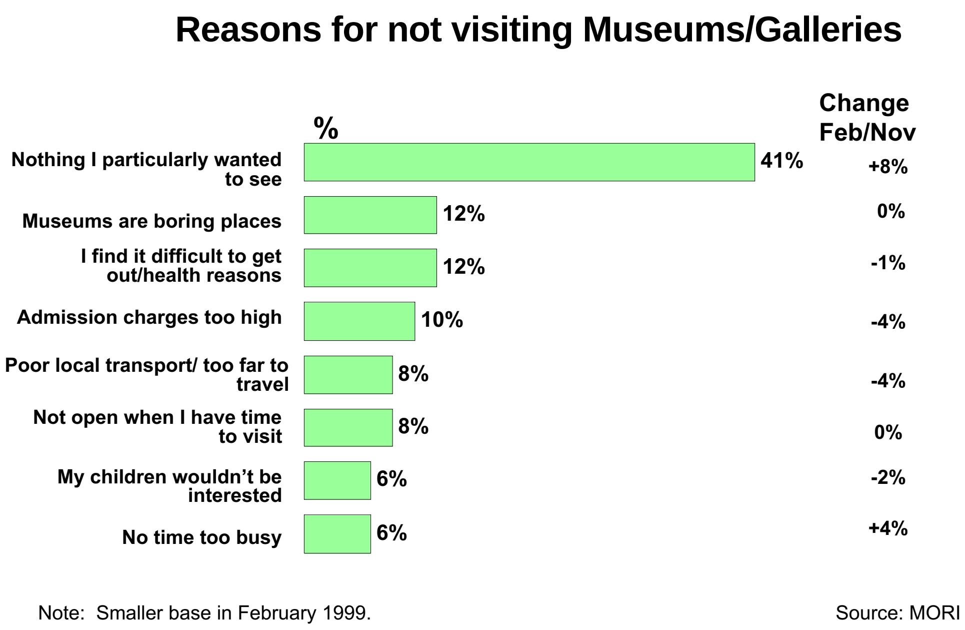
- 1999 was a **pre-millennium year** when many museums and galleries were saving new major exhibitions until 2000, while in a similar way, the public may also have been "holding-back" until the new millennium.

All of these factors will be discussed more fully in the conclusions and implications at the end of this report.

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%).

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 March 1999). This appears to be a particularly frequent response among the Scottish public (59% gave it as a reason) and younger people in general (16-24 year olds, students, and 25-34 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 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).

The Core Market

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. However, the apparent decline of family groups means that they are now less likely than average to be museum and gallery visitors.

Students remain the most likely section of the public to visit museums and galleries, 37% had visited in the previous 12 months up until November/December 1999. A further one-third of people aged between 25 and 64 (without children) had visited a museum or gallery during the same period.

Visitors to Museums and Galleries – Life Stages

	Nov/Dec 1999	**Feb 1999***	**Change +/-**
Base: All	*(4,461)*	*(2,454)*	
	%	%	%
Students	37	52	-15
Adults 35-44	35	44	-9
Adults 25-34	34	41	-7
Adults 55-64	34	40	-6
Adults 45-54	32	39	-7
Adults 25-44 (with children aged 5-10)	29	38	-9
Young Adults 16-24	28	NA	
Adults 25-44 (with children aged 10+)	24	43	-19
Adults 65+	22	28	-6
Adults 25-44 (with children aged 4 or under)	22	33	-11
Young Adults 16-24 (with children)	17	NA	

** February 1999 data is unweighted*

Source: MORI

All of the life stages analysed experienced decreases in the proportion of people who visited museums and/or galleries, with the largest decreases among those adults with children.

Volume of visits – the core market

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:

a) the proportion of people in each life stage who make a visit

b) the frequency of their visits

c) 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

Base: All (4,461)	**% of UK population** %	**% of visitors to museums and galleries** %	**Average frequency of visits p.a**	**estimated % of all visits** %
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 aged 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%).

Life Stage Profiles

Students

- Students remain one of the core groups of visitors to museums and galleries - 37% have visited in the past 12 months (28%).

- The proportion of students who visited museums and galleries decreased significantly (by 15%) between the two waves of research, from 52% in February 1999 to 37% in November/December 1999.

- Students tend to be infrequent visitors, with only around one-third (34%) having visited three or more times in the 12 months up to November/December 1999 compared with 53% of all visitors.

- Just under half (48%) normally visit with friends compared with only one-quarter of all visitors (24%). One-third of students visit with parents or other relatives (32%).

- Students are more likely than average to have visited decorative/applied or fine art museums or galleries (52% compared with 36% of all visitors).

Families

- As in February 1999, children aged between 5 and 10 still appear to have slightly more influence over family museum visits than children aged 4 or under, or those aged over 10;

  – More than eight out of ten adults with children aged between 5-10 stated that they normally go with their children, compared with only two-thirds (67%) of adults with children aged 4 or under.

  – their reason for visits is more likely to be “because children wanted to come” (48% vs 37% aged 4 or under). Although the proportion of adults (with children aged 5-10) who stated that they “tend to visit when there is a special event which appeal to the children” fell from 70% to 45% between the two waves of research.

- One in five adults with children aged under 4, who had not been to a museum or gallery in the previous twelve months, stated that one of their main reasons was because they felt the children would not be interested (21%).

- Whether a person has family or not appears to have little influence over their opinions of the value for money of visits or their likelihood to recommend museums or galleries to friends.

- Probably due to the time constraints of family life, adults with children tend to be infrequent visitors with an average of between 2.42 and 2.55 visits a year. Adult visitors (aged over 25) without children tend to visit at least three times a year.

Middle aged 35-44 without children

- The proportion of people from this group who visited museums and galleries did not decrease significantly between the two waves of research (34% compared with 41% in February).
- This group is more inclined to visit alone (27% tend to, as opposed to an average of 17% for all visitors).
- They tend to be frequent visitors, with more than one-third having visited at least 5 times in the past 12 months (34%).
- They visit a broad range of types of museums and galleries, with no specific type standing out as the most popular.

Middle aged 45-54 without children

- Although not statistically significant[1], there has been an apparent decrease in the proportion of 45-54 year olds who visit museums and galleries (down to 35% from 44% in February).
- Almost two-thirds of this group tend to visit museums and galleries with their partner (64%) compared with half of all visitors (50%).
- This group is those most likely to recommend museums and galleries to their friends. More than one-third would be "certain to" do so (37%) as opposed to 28% of all visitors.
- Half of these middle-aged visitors, visit museums and galleries when travelling abroad (51%) compared with only 35% of visitors overall.
- They tend to be some of the most frequent visitors, with 36% having visited 5 or more times in the past 12 months (the highest proportion of all the life stage groups).
- Their favourite types of museums and galleries appear to be those which include decorative/applied and fine art or social/local history (visited by 45% and 41% of people respectively).

[1] The sub-samples for the first wave of research are relatively small, as a result, the differences between the figures from each wave need to be relatively large for them to be statistically significant.

Older adults 55+ without children

- This group still accounts for the largest proportion of all museum and gallery visits, despite an apparent decline in the proportion who were visitors compared to the previous wave (by 6% points).

- Although they tend to be frequent visitors (around 3 trips per year), on average they visit less often than middle-aged people (35-54 year olds average around 3.2 trips per year).

- Just under one-quarter of this age group (23%) have a “favourite” museum or gallery, which they like to visit frequently, compared with an average of 16% of all visitors.

- More than two-thirds think their most recent visit was very good value for money (68%) with only 2% considering it poor value for money. (Compared with averages for all visitors of 54% and 4% respectively).

- They are more likely than average to recommend the latest museums or gallery they visited to friends (34% stated that they are certain to compared with 28% overall).

Regional Differences

Across the two waves of research, there has been no significant decrease in visitors to museums and galleries from the South East (including London) of England. In contrast, certain regions, such as the South West, Wales and North West have experienced a marked decline.

Overall, more than three out of ten people living in the South East of England (including the Eastern region), the West Midlands and Yorkshire and Humberside, visited a museum or gallery during the 12 months prior to the survey. In contrast, museums and galleries appear less popular among people living in more peripheral parts of the country, particularly Wales, Northern Ireland and the South West.

Although the proportion of the UK public who visit museums and galleries appears to have decreased between the two waves of research, this trend does not appear to be consistent throughout the country.

In terms of trends, the appeal of museums and galleries does not appear to have changed significantly in London and the South East, Yorkshire and Humberside, Scotland or Northern Ireland. However, certain areas, like Wales (-22%) and the South West (-15%) have experienced a significant decline.

Visitors to Museums and Galleries – Regions

	Nov/Dec 1999	**Feb 1999**	**Change +/-**
Base: All	*(4,461)*	*(2,454)*	
	%	%	%
Eastern	35	41	-6
South East (excluding London)	35	37	-2
Yorkshire & Humberside	34	36	-2
West Midlands	31	39	-8
London	31	33	-2
East Midlands	26	37	-11
North West	25	35	-10
North East	24	32	-8
South West	22	37	-15
England	**30**	**36**	**-6**
Scotland	**24**	**26**	**-2**
Wales	**16**	**38**	**-22**
Northern Ireland	**14**	**11**	**+3**

Source: MORI

Volume of visits – by Region

As with the life stages, estimates have been made of which regions account for the highest proportion of actual visits to museums and galleries.

Visitors from the **South East of England** (including the Eastern region and London) account for around four out of ten (41%) visits to museums and galleries across the UK (despite the area only making up around 34% of the total UK population). This includes 15% from the South East itself, 13% from London and 12% from the Eastern region.

The results also indicate that people in **Yorkshire and Humberside** are more likely than average to visit museums and galleries, as they represent 11% of all visits but only 8% of the population.

Visits to Museums and Galleries – Regions

Base: All (4,461)	**% of UK population** *%*	**% of visitors to museums and galleries** *%*	**Average frequency of visits p.a**	**estimated % of all visits** *%*
South East (excluding London)	13	17	2.66	15
London	12	13	2.88	13
Eastern	9	11	3.14	12
North West	12	10	2.96	11
Yorkshire & Humberside	8	10	3.24	11
West Midlands	9	10	2.76	9
East Midlands	7	7	2.77	6
South West	8	6	2.36	5
North East	4	4	3.05	4
England	83	88	2.87	88
Scotland	9	7	3.24	8
Wales	5	3	2.84	3
Northern Ireland	3	1	2.46	1

Source: MORI

People living in the **South West, Wales** and **Northern Ireland** appear less likely to visit museums and galleries. In each of these areas, the people account for a smaller proportion of visits, than the proportion they represent in the UK population, for example the South West contains 8% of the UK population, but its residents only accounted for around 5% of museum and gallery visits.

Social Class & Ethnicity

Social class is one of the main indicators as to whether people do or do not visit museums and galleries – with higher social classes far more likely to visit. ABC1s account for 70% of museum and gallery visitors but only around half of the UK population (49%).

Overall, just under half of ABs have visited museums and/or galleries during the past 12 months (47%), compared with 15% of people classified as DEs. There has been an apparent decrease in the proportion of visitors from all the social class groups, including an 11% decrease in the proportion of visitors in the AB social class category.

The issue of ethnicity is more difficult to gauge due to the relatively small proportion of the population accounted for by specific ethnic minorities. For the purposes of this study, Black (Caribbean) and Black (African) residents have been combined, along with a separate category for all UK residents of Asian origin. Just under three in ten White (European) people in the UK visited a museum or gallery during the 12 months prior to November/December 1999 (29%, compared with 36% in February 1999). A similar proportion of Asian people visited during the same period (29%), however Black residents appear significantly less likely to have visited (10%). (Unfortunately, the sample sizes were too small in the February wave of research to provide trend data.)

Visitors to Museums and Galleries – Social Class & Ethnicity

	Nov/Dec 1999	**Feb 1999**	**Change +/-**
Base: All	*(4,461)*	*(2,454)*	
	%	%	%
Social Class			
AB	47	56	-11
C1	31	39	-8
C2	23	29	-6
DE	15	23	-8
Ethnic Origin			
White – European	29	36	
Black – African/Caribbean	10	small sample	-
Asian	28	small sample	-
All	28	35	-7

Source: MORI

Volume of visits – by Social Class and Ethnicity

Each year, ABs are estimated to make around two in five of all visits to museums and galleries (40%) – despite them only accounting for 22% of the population. This is due to the fact that they not only represent a larger than average proportion of visitors, but these visitors also visit more often (an average of 3.19 visits a year, compared with an overall average of 2.89 visits). In contrast, DEs represent 29% of the population, but represent around 14% of all visits.

Visits to Museums and Galleries – Social Class & Ethnicity

	% of UK population	**% of visitors to museums and galleries**	**Average frequency of visits p.a**	**estimated % of all visits**
Base: All (4,461)	*%*	*%*		*%*
Social Class				
AB	22	36	3.19	40
C1	27	30	2.95	30
C2	23	18	2.46	16
DE	29	16	2.62	14
Ethnic Origin				
White – European	92	94	2.92	95
Black – African/Caribbean	1	*	1.80	*
Asian	2	2	1.42	1
All visitors			2.89	

Source: MORI

The broad ethnic groups analysed indicate that Black and Asian visitors tend to visit museums and galleries less frequently than White (European) visitors. Indeed, Asian visitors tend go on less than half the number of visits than the average visitor (1.42 visits a year compared with an average of 2.89).

Attitudes of Schoolchildren

Schoolchildren in England & Wales

More than one-quarter of schoolchildren have visited a museum or gallery web site (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.

Use of Museum web sites

The Science Museum web site is the most visited museum/gallery web site by schoolchildren (14% have visited), followed by those for 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 web sites. However, their ethnic origin does appear to have an influence, with ethnic minority children more likely to have visited some museum web site than white children (34% of ethnic minority children had used at least one of the sites listed, compared with only 25% of white children).

Visits to Museum Web Sites

	Web sites visited	**Favourite web site**	**Favourite sites among visitors**
Base: All (2,531)	*(%)*	*(%)*	*(%)*
Science Museum	14	7	48
Natural History Museum	13	5	42
British Museum	10	3	31
London Transport Museum	7	1	20
National Grid for Learning	7	3	48
Museums & Galleries Commission	7	1	20
Public Records Office (The Learning Curve)	4	1	38
24 hour Museum	4	1	29
SCRAN (Scottish Cultural Resources Access Network)*	3	*	3
Cornucopia	2	*	9
Other Museum web site	2	1	47
None of these	61	54	-
Don’t know/not stated	12	21	-

Source: MORI

* sample excludes Scottish schools

Not surprisingly, with the most number of visits, the Science Museum web site is the children’s favourite. The third column on the above table illustrates the proportion of children who had visited a particular site, against those who chose it as their favourite.

This indicates that, although the National Grid for Learning site is not one of the top sites in terms of actual visits by school children – those children who have been to the site are more likely than average to select it as their favourite (48%, equal to the Science Museum).

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 as good places to learn outside school (29% and 28% respectively).

The best places to learn outside school

Base: All (2,531)	**Best places to learn outside school** *(%)*	**The best place** *(%)*
A library	70	38
The internet	62	23
TV/videos	50	8
A local museum/gallery	29	3
A national museum or gallery (e.g. the British Museum)	28	7
Zoos/aquariums/farms	20	3
Cinema	17	2
Other	5	3
None of the above	1	1
Don't know/not stated	6	12

Source: MORI

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 web sites, they are less likely than white children to think that the internet is the best place to learn outside school (19% and 24% respectively).

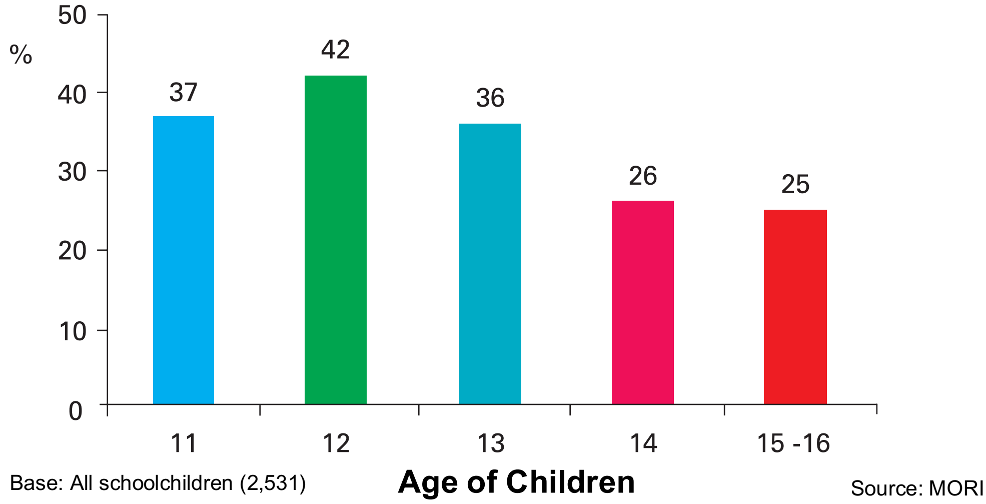
Although the internet is still less popular than libraries as a source of learning, its potential cannot be ignored. Current growth rates suggest that each week around 12,000 people in the UK start using the internet for the first time.

Visits to Museums and Galleries (not on a school trip)

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?



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 15/16 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 overleaf).

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

Base: All (2,531)	**All responses** *(%)*	**Which ONE would you most like** *(%)*
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

Advertising

Children were presented with a list of possible places where museums and galleries could advertise. Schools are considered the best places for museums and galleries to advertise when trying to reach young people. A similar proportion of schoolchildren, (between 8% and 11%) think that fast food restaurants, magazines, local papers, youth clubs, libraries and shopping centres, would be the best places to advertise.

The best place to advertise a museum

Base: All schoolchildren (2,531)	**All responses** *(%)*	**Which ONE would be the best** *(%)*
Schools	66	27
Magazines	57	9
Youth clubs	51	8
Fast food restaurants (e.g. Burger King, McDonalds)	46	11
Shopping centres	42	8
Local papers	42	8
Libraries	36	8
Supermarkets	22	1
Other	3	1
Don't know/not stated	13	17

Source: MORI

MORI

Visitors to Museums & Galleries

Museums and galleries remain as one of the most popular types of attraction in the UK, however, as with similar types of heritage/cultural attractions their popularity appears to have declined slightly in recent years. Although this study has not tackled the possible reasons for this apparent decline, it is likely that it is due to a combination of factors – not least, increasing competition in the leisure market.

- Around three out of ten people in the UK visit a museum or gallery at least once a year (28%).
- Over the past ten years, the proportion of the UK public who visit museums and galleries has declined slightly year on year.
- Museums and galleries are still very competitive when compared with other types of attractions and events – remaining top in the range of attractions alongside well-known parks and gardens.
- Traditionally visited by a smaller proportion of the UK public, the "entertaining" attractions and events, such as theme parks, live sporting events and pop and rock concerts, appear to be closing the gap on museums.

Although this research has not tackled in detail the key reasons for these changes in the leisure habits among the public, it is likely that the apparent change is due to a combination of factors.

New developments in leisure activities – computer games, the internet, eating out, health and fitness clubs and Sunday shopping have all increased in popularity in recent years. While these activities may not appear to be in direct competition with museums and galleries, the fact that they account for more of peoples' leisure time is likely to mean that people spend less time participating in traditional leisure activities. Significantly, they also tend to be activities, which are popular among some of the core museum and gallery visitors (e.g. middle aged ABC1s).

Over the past decade, of those places to visit and events measured, only cinemas appear to have shown an increase in popularity. The boom in attendance levels is largely based around the growth in multiplex cinemas (the first was built in 1985 and there are now over 140 in Britain) and an overall improvement in the quality of cinemas. The whole experience of going to the cinema has changed.

Reduced leisure time, Henley Centre Leisure Tracking Surveys indicate that in the UK the number of non-working hours has decreased by 100 hours per year across a four year period. The increase in leisure time that many sources were predicting a few years ago has not happened yet.

The decrease in domestic holidays – the proportion of the population taking holidays in UK has declined over the past few years. One of the main reason for this has been the increasingly cheap overseas holidays and flights. As just under half those who visit museums and galleries state that they do so when they are on a holiday or short break in the UK (45%), this obviously has an impact on visitor numbers.

Was 1999 an unusual year? – the large decrease in visitors to museums and galleries during 1999 may just be temporary. Many museums and galleries have delayed major exhibitions until the new millennium and in a similar way, perhaps many of the UK population were saving themselves as well? Some of the regional trends may also be linked to exceptional events, such as the Eclipse in the South West which might have detracted people from visiting attractions.

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 current proportion of children (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 - 27% of schoolchildren have visited a museum or gallery web site and 23% consider the internet to be the best place to learn outside school).

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 itself has not fully addressed *why* this has happened.

The fact that declining visitors 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 rather a whole new string of leisure activities.

With this in mind, future research should investigate more about the **role museums and galleries play in people's leisure time**. Are they still seen as *key* educational tools or is this role diminishing in the face of competition from television and the internet? If this is the case, how can museums and galleries maintain their position in the leisure market? While it is not suggested that changes need to be made to the core museum product, i.e. the collections, there is enormous potential to develop the surrounding products at museums and galleries including the shops, cafés, special events and the interpretation of collections. It is in this area that research can be used to help guide future development.

Whatever their long term strategic plans, if museums are to continue to face up to their "new" competitors in the leisure market they need to place a high priority on marketing and audience development.

MORI/ 12542 *Isabelle Sogno-Lalloz*
February 2001 *Peter Hasler*

Appendices

Statistical Reliability – Visitors to Museums & Galleries

The sample tolerances that apply to the percentage results in this report are given in the table below. This table shows the possible variation that might be anticipated because a sample, rather than the entire population, was interviewed. As indicated, sampling tolerances vary with the size of the sample and the size of the percentage results.

For example, on a question where 50% of the people in a weighted sample of 4,461 respond with a particular answer, the chances are 95 in 100 that this result would not vary more than two percentage points, plus or minus, from a complete coverage of the entire population using the same procedures.

	Approximate sampling tolerances applicable to percentages at or near these levels		
	10% or 90% ±	**30% or 70%** ±	**50%** ±
Size of sample on which survey result is based			
4,461 (November/December 1999)	1	1	2
2,897 (March 1999)	1	2	2

Source: MORI

Tolerances are also involved in the comparison of results from different parts of the sample. A difference, in other words, must be of at least a certain size to be considered statistically significant. The following table is a guide to the sampling tolerances applicable to comparisons.

	Differences required for significance at or near these percentage levels		
	10% or 90% ±	**30% or 70%** ±	**50%** ±
Size of sample on which survey result is based			
2,575 vs 1,886 (Women vs Men)	2	3	3
2,017 vs 1,301 (Tabloid vs Broadsheet)	2	3	4
539 vs 361 (London vs West Midlands)	4	6	7
160 vs 104 (London vs West Midlands – museum & gallery visitors)	7	11	12

Source: MORI

Technical Details

Sample Design

There are 641 parliamentary constituencies in Great Britain. From these, we selected 175 to be used as the main sampling points on the Omnibus. These were chosen to be representative of the whole country by region, class, voting patterns and other variables. Within each constituency, two mapped areas each containing 5,000 addresses are selected to represent the socio-demographic makeup of the constituency. For each Wave of the Omnibus, we rotate between these two areas, covering one per Omnibus. Interviewers approach a different set of addresses each time, with the mapped area ensuring representativeness.

Within each point, twelve respondents were to be interviewed. Respondents were selected by means of a 10-cell quota with which the interviewer has been provided. The quotas used are:

Sex:	(Male, Female)
Household Tenure:	(Owner occupied, Council/HAT, Other)
Age:	(15-24, 25-44, 45+)
Working status:	(Full-time, part time/not working)

These quotas were devised by an analysis of a full year's data on the National Readership Survey and the 1991 Census and Registrar-General's mid-year estimates. In each area, quotes represent the makeup of that area. Overall, quotas ensure that the demographic profile of the sample matches the actual profile of the country. The sample is thus representative of all adults in Great Britain aged 15+. The total sample set was 12 x 175 sample points = 2,100.

Fieldwork

Fieldwork was carried out by MORI/Field & Tab on MORI's Omnibus using CAPI. Interviewers were provided with a list of addresses within each point. All interviews were conducted in the home, with only one interview per household. No incentives were offered to respondents.

Weighting and Data Processing

Data entry and analysis were carried out by Numbers Data Processing Ltd. The data were weighted using target rim weights for social class, standard region, unemployment within region, cars in household, and age within sex. This was to adjust for any discrepancies in the coverage of individual sampling points and to ensure representativeness.

Definitions of Social Grades

This appendix contains a brief list of social class definitions as used by the Institute of Practitioners in Advertising. These groups are standard on all surveys carried out by Market & Opinion Research International Limited.

Social Grades

	Social Class	Occupation of Chief Income Earner	Percentage of Population
A	Upper Middle Class	Higher managerial, administrative or professional	2.9
B	Middle Class	Intermediate managerial, administrative or professional	18.9
C1	Lower Middle Class	Supervisor or clerical and junior managerial, administrative or professional	27.0
C2	Skilled Working Class	Skilled manual workers	22.6
D	Working Class	Semi and unskilled manual workers	16.9
E	Those at the lowest levels of subsistence	State pensioners, etc, with no other earnings	11.7

MORI
79-81 Borough Road
London SE1 1FY
Tel: +44(0)20 7347 3000
Fax: +44(0)20 7347 3801
e mail: mori@mori.com
Internet: www.mori.com

MORI
32 Old Queen Street
London SW1H 9HP
Tel: +44(0)20 7222 0232
Fax: +44(0)20 7222 1653
e mail: mori@mori.com
Internet: www.mori.com

MORI
18 Dublin Street
Edinburgh EH1 3PP
Tel: +44(0)131 558 1515
Fax: +44(0)131 558 1717
e mail: scotland@mori.com
Internet: www.mori.com

Associates in Europe and North America and offices in London, Edinburgh, Sydney, Melbourne, Mexico City, Santiago, Sao Paulo, Buenos Aires, Lima, Montevideo, Caracas, Istanbul, Bombay, New Delhi.