DCMS-sponsored museum visit trends

An analysis of factors impacting on visits to DCMS-sponsored museums

March 2020 report

morris hargreaves mcintyre

An introduction from the author

An unexpected drop in visits to DCMS-sponsored museums across England between 2014 and 2018, particularly in London, sparked this study to understand what factors might drive, or constrain, museum visitation.

We agreed research objectives with DCMS, undertook desk research to explore trends, and together generated a range of hypotheses on what might lie behind the drop in visits. These hypotheses reflected the political, economic, social, technological and environmental and legal (PESTEL) factors that might impact on museums. They also included a consideration of the institutions' own activities.

We conducted extensive secondary research plus primary qualitative and quantitative fieldwork.

Our analysis of the key factors that have the greatest positive or negative impact on visits has generated a series of recommendations for the future. Several of these recommendations require investment and, as such, are inherently tied to the level of financial support available to the museum group.

Our hope is that this insight will support the sector in continuing to provide remarkable experiences for millions of people for many years to come.

Gerri Morris, Director
Morris Hargreaves McIntyre

The Department for Digital, Culture, Media and Sport (DCMS) sponsors national museums and art galleries which provide free entry to their permanent collections. These are referred to as DCMS-sponsored museums throughout this report. **See page 76 for the full list of currently sponsored museums and details of those included in this study.**

Contents

Executive summary

Executive summary

Introduction

Museum attendance in the UK, including the DCMS-sponsored museums, reported almost continuous growth from the turn of the century up until 2014/15 when there was a deflection from what had become an accepted norm. In the three years following 2014/15, the overall number of visits to DCMS-sponsored museums fell year-on-year. This was most evident among museums in London, and this therefore became a key focus for this study.

An upturn in visit numbers in 2018/19 (and early indicators for 2019/20) demonstrates that the sector continues to be in a remarkably healthy condition. However, the picture is not consistent. Museums have been, and continue to be, subject to a range of external and internal factors, the effects of which are borne out in visit numbers and audience profile data.

Analysis of visitor data (gathered by MHM through exit surveys at a selection of the DCMS-sponsored museums between 2011/12 and 2018/19) shows that London museums experienced significant growth in visits from all origin groups leading up to 2014/15.

Since then, North American visits have continued to grow; London and Rest of World visits have been sustained at this higher level; but visits from Europe and elsewhere in the UK have dropped significantly, returning to pre-2014/15 levels.

In addition to visitor origin, there are indications that the three year decline period was predominantly caused by audiences who would be classified as the ‘mass market’ - those on a first time visit, with no vocational connection to the arts and who are motivated to visit for social reasons. Conversely, the audience sustained in this period was a more culturally engaged market - more intellectually motivated audiences with a vocational connection to the arts.

In order to understand these fluctuations, we explored the wider trends affecting the museums sector (external factors) as well as factors directly within the museums sector (internal factors). It is a combination of key factors across both - with a bias towards external factors - that has influenced attendance fluctuations.

External factors

To assess the external trends affecting DCMS-sponsored museums, we considered a range of PESTEL factors, and developed associated hypotheses based on extensive desk research, prior work in the sector.

Analysis of London tourism trends was required to ascertain whether the fluctuation in museum visits was exclusive to the sector, or the impact of a broader, **London phenomenon**.

Domestic tourism data showed that day visits to London **peaked** in the **Olympic** year (2012), experienced a secondary peak in 2016, but have since been in decline, returning to the pre-Olympic level. Domestic overnight stays have been more variable with significant dips and peaks between 2014 and 2016.

Fluctuations in **international** visits to London broadly **correlate** with the trends at museums. **European** visits saw significant increases up to 2016, and have since declined. Whereas, visits from **other international** markets have seen slow, but **continual, growth**.

The years leading up to the turn of the century saw two major changes that would have influenced overseas tourism to the UK and London: the **deregulation** of the airlines industry and with it the introduction of **low cost airlines** that made flights between the UK and Europe far cheaper, and the universal adoption of the internet, enabling ease of booking flights.

London's cultural offering, particularly museums and galleries, remain a **priority** for visiting domestic and overseas tourists; exhibitions continue to break records, membership schemes grow and the **perceptions of culture** in the UK are among the most **positive** in the world.

However, museums feel the **effect of broader trends** in relation to wider perceptions of the UK. Following the decision to leave the European Union, studies show that those living in mainland **Europe** are **decreasingly likely to feel welcome** in the UK and **less likely to visit**.

Conversely, perceptions held by those from other key international markets for the UK, including the USA and China, are more positive following the referendum in 2016. However Europe is by far the largest market for the UK; therefore, even small changes in perceptions and propensity to visit could have a significant impact on overall tourism trends.

The impact of **terror-related incidents** on museum attendance in London was also an important factor to consider. While museums have typically only seen drops in visits in the **immediate wake** of incidents (e.g. Westminster Bridge, March 2017), visit figures show these didn't have a longer impact. Similarly, our research shows this was often a consideration, but **not a primary deterrent** for visiting museums in Central London. That said, depending on the frequency and nature of similar incidents in the future, this could be an increasingly prevalent barrier.

Despite the aforementioned factors, the **value of GBP** has helped **sustain** some overseas markets, particularly those from China and the USA. When the exchange rate is in their favour, visitors from overseas are more likely to visit the UK, particularly those visiting London for the **first time**.

Conversely, continued **economic squeeze** and **uncertainty** of the impact following Brexit is **suppressing** the domestic market. UK **consumer confidence** hit -14 in October 2019, the **lowest** since July 2013 (-16).

More specifically, in relation to visiting Central London for leisure, survey data shows **visit frequency has reduced**, and **financial** factors are most commonly cited as a main reason. Tho cost of travel, accommodation, subsistence and attractions admission were felt to be prevalent barriers.

The London 2012 Olympics was also a significant factor affecting visits to London and the UK. While many Central London sites and attractions received fewer visits during the games, the Olympics served as a **broader promotional campaign** for London - **inspiring international** visitors to travel and **reminding domestic** tourists to return. As a result, in addition to the mainstay cultural market, visits were **supplemented** by those from a **wider mass market** audience. This influx of new visitors, largely from Europe, helped **push visits** to a peak in 2014/15.

The social, technological and environmental trends catalysing these visits have engendered vastly **increased choice** and **diversity** of **experiences** in neighbourhoods across London and the regions. Therefore museums, whilst benefitting from the trends, are also now operating in a far more **competitive marketplace**. In particular, we have seen an increasing desire for authentic and immersive experiences (the **experience economy**).

While the Olympics and the halo years to 2014/15 signified 'peak London', there are signs that the **resulting crowds** in London had a deterrent effect on domestic visitors making London, and the museums, possible victims of their own success.

Internal factors

We then considered factors within the museums market which had an impact on visit numbers, particularly developing hypotheses around the cause of the volatility in attendance between 2014/15 and 2017/18.

The abolition of **admission charges** to national museums in 2001 contributed to the upward trajectory of museum visits in the following years. 18 years later, domestic audiences in particular continue to cite the benefit of free admission as a motivation for visiting.

However, **economic factors** are among the most common barriers to visiting Central London more frequently, and this perception of cost does extend to museum attendance. The **wraparound costs** of travel, subsistence and accommodation in Central London are often barriers to attending free national museums.

Perceptions of value for money are also affected by the prevalence of **exhibition-focused marketing**. Museums prioritise advertising paid programming and temporary exhibitions as this delivers a clear return on investment. However, in doing so, people are not being reminded of the quality and breadth of their **free collections**.

Returning to the impact of perceived busyness in London generally, this is also felt to extend to the museums. Domestic audiences, particularly those living in London, perceive many of the larger museums to be **overcrowded**, in both temporary exhibitions and the general collections, and are therefore less likely to consider visiting.

It could be argued by a number of national museums that there are **limits** to how many people they can accommodate once they have tipped 5-6m visits, and it is possible that the volume of visits in 2014/15 brought venues close to **full capacity** at times, thus **negatively impacting** on people's perceptions of the **visit experience**. However, it is generally the case that the assumptions on which capital developments and business plans are based expect that visits will remain at these peak levels or, more likely, will continue to increase, along with earned income, and this is the basis for their sustainable business models.

Recommendations

The trends identified in this research suggest that London museum visits have experienced a peak, subsequent decline and are now showing signs of recovery. While some venues experienced a recovery in 2018/19, and signs continue to look positive, the factors impacting the three year decline from 2014/15 remain influential.

The implication of this is that strategic intervention is required if the sustainability of London's national museums is dependent upon maintaining or exceeding this level of peak business. And if, as appears to be the case, certain market groups are diminishing, then others need to be cultivated more energetically to replace them.

Several of the factors influencing the recent decline in visits to DCMS-sponsored London museums are difficult for individual museums to mitigate, most notably the impact of Brexit, the possible resultant economic downturn, the cost of travel to London, and the cost of accommodation within London. Other factors, whilst often not within the direct control of DCMS or the museums themselves, are more readily addressed through a series of actions.

These actions have been provided to address the immediate challenges facing the sponsored museums: the three to four-year decline in mass market attendance. But whilst the active culture market is currently stable, particularly among hyper-engaged Londoners, many of the challenges identified as being most pertinent to the mass market could present the same challenge to the culture market in the coming years.

Policy actions

1. London, as a destination, benefits from regular promotion: instil the UK mass market with a sense of urgency to visit London through periodic UK-wide and European campaigns.
2. Recognise the importance of museums in the London's tourism offer through dedicated promotional campaigns. Museums are among the top priorities of places tourists expect to visit and, being free, exclude no one. This needs to be preserved and celebrated.
3. European relations are the number one threat to further visit decline: strategies need to be considered to overcome the increasingly negative perceptions of the UK among Europeans.
4. Consider strategies that increase awareness of the UK public, and overseas tourists, that national museums are free and extraordinary. This awareness shouldn't be assumed.
5. Invest in further research related to travel difficulties and perceptions of travel in London.

Museum actions

1. Strategies are required to keep pace with social trends. This includes addressing the systemic challenges facing all commercial and public sectors in terms of ethnic, sexual and socio-economic diversity, as well as continuing to adjust to changing technological and social trends encapsulated by the booming Experience Economy.
2. Consider the benefits of working in partnership to create a group-wide destination campaign.
3. Consider solutions that package ticket and travel.
4. Consider the long-term impact of exhibition pricing strategies.
5. Consider food and drink pricing strategies.

Methodology

Our findings and recommendations are based on:

- an England-wide population survey
- focus groups with domestic audiences in London, Birmingham and Liverpool
- vox pop interviews and an on-street survey of international tourists in locations across Central London
- analysis of DCMS-sponsored museum visit numbers (secondary research)
- econometrics analysis to establish if and to what extent external covariates impact visit trends (e.g. weather, consumer confidence)
- analysis of audience trends using data from London museums' exit surveys (secondary research)
- environmental and situational analysis of tourism trends, cultural engagement research, studies relating to leisure time behaviour and trends (secondary research)

A full methodological description can be found on page 14 and in the accompanying technical report.

1. What prompted this study?

- Fluctuating visits to DCMS-sponsored museums
- Key research questions
- A comprehensive study of the sponsored museums’ environment
- Analysing trends and their relationship with audience groups
- Hypotheses generation

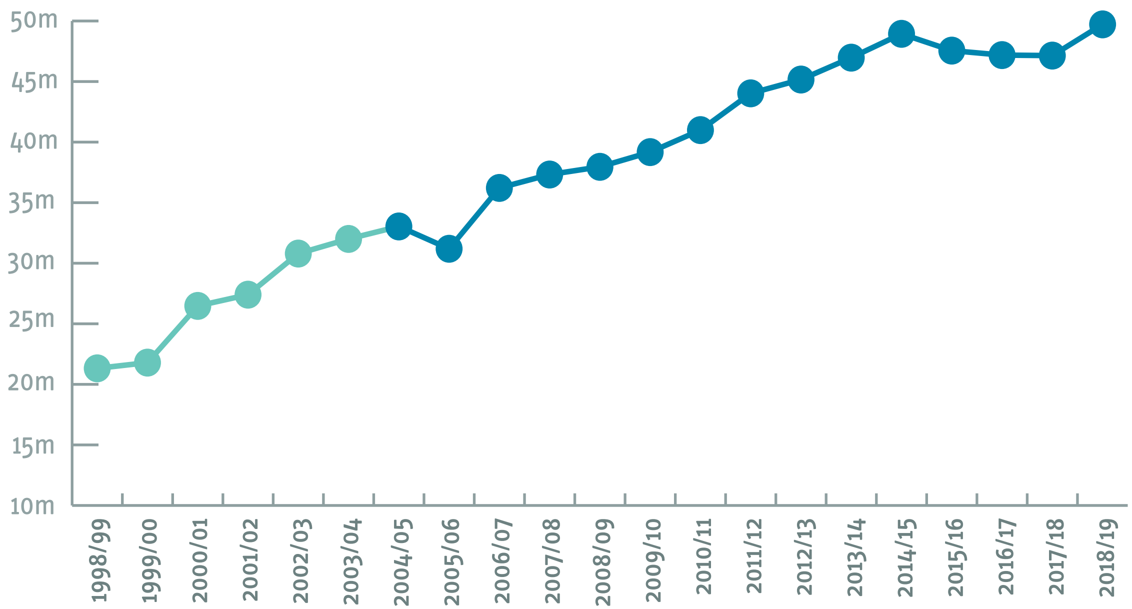
What prompted this study?

After years of **continuous growth**, visits to DCMS-sponsored museums **declined** for **three consecutive years** from 2014/15. The cause for this was not clear.

While visits rebounded in 2018/19, meaning visits to DCMS museums across England were at an **all-time high**, there was clearly a need to better **understand** what drives and constrains visits to DCMS-sponsored museums, to help **forecast** and **mitigate** against factors which are proven to have a negative impact on visits.

Visits to DCMS-sponsored museums across England since 1998/99

[DCMS visit numbers]



Data from **2004/05** is published on gov.uk. Data from **1998/99 to 2003/04** is not directly comparable, but is included to indicate the impact of free entry introduced at the national museums in 2001.

Fluctuating visits to DCMS-sponsored museums

Since 1998/99, visits to DCMS-sponsored museums across England have risen significantly from 21.3m to an all-time high in 2018/19 (49.72m), exceeding the previous peak of 2014/15 (48.94m).

However, in the intervening years (2015/16 - 2017/18), visits showed a pattern of decline, with some organisations seeing losses of up to 22% of visits in a single year.

Analysis of DCMS-sponsored museums visit trends is based on **daily visit data** of organisations currently sponsored by DCMS. For most organisations, a consistent data set exists back to 1998. For a full list of sponsored museums included in this analysis, see appendix (page 76).

https://www.gov.uk/government/statistical-data-sets/museums-and-galleries-monthly-visits

DCMS wished to respond promptly to the downturn in figures in order to assist museums to adapt to possible changes in the environment.

There was a rebound in overall attendance at the sponsored museums in the year 2018/19 (published in April 2019), showing visits to DCMS museums across England at an all-time high. However, analysis revealed that this uplift was disproportionately attributable to museums outside of London. A more limited rebound in London was largely due to high growth levels at just two of the sponsored museums, where visit numbers returned to more 'typical' levels after significant decreases in previous years.

Therefore, the underlying trends still required some attention. Understanding the factors behind this volatility, what might be driving or preventing admissions to DCMS-sponsored museums, is essential to help these institutions plan, forecast, exploit and/or mitigate the impact of market forces to ensure a sustainable future.

Key research questions

This led DCMS to ask:

- How have numbers of visits to the DCMS-sponsored museums across England, as well as London specifically, changed over the past 15 years?
- How does this picture compare to wider trends in numbers of visitors to non-national, regional museums and other cultural attractions (e.g. heritage sites)?
- And how does this compare to wider tourism trends (e.g. inbound visits to London)?
- What are the internal and external factors affecting museum visit numbers?
- Are the trends at DCMS museums consistent across visitor populations (e.g. defined by age, gender, socio-economic background, nationality, location)?
- Which audiences have museums lost and gained over this period?
- Ultimately, what can DCMS and the sponsored museums do to address or mitigate declines in visit numbers?

A comprehensive study of the sponsored museums' environment

DCMS commissioned Morris Hargreaves McIntyre (MHM) to undertake a study on the environment in which the sponsored museums operate, exploring:

- The trends in visits to the sponsored museums over the past 15 years to establish if these are consistent with, or anomalous to, the wider museum sector and cultural sector
- Deep dive analysis into the profile of audiences attending sponsored museums between 2011/12 and 2018/19 (demographics, visit origin, visit history / recency, group composition and motivations). This was data collected through rolling visitor research at a number of DCMS-sponsored museums by MHM
- Environmental analysis, including trends in domestic and international tourism in London, trends in leisure time behaviour in the UK and the impact of digital developments on visitors' decision making and planning
- The range of factors which both drive and deter museum visits, and the extent to which these affect different audience groups

Analysing trends and their relationship with audience groups

Between 2011 and 2019, MHM collected, analysed and benchmarked visit data and trends for a group of London's National Museums. During this time it was apparent that analysing the positive and negative movement of specific audience groups was key to understanding the factors driving general trends.

For this study we first needed to identify who had contributed to the growth in visits over time and who was missing in the years when visits dropped, in order to frame the hypotheses. To this end we identified the main audience groups (defined by visit origin) that help us relate growth or decline in visits with possible causes. These are described below:

Domestic visitors:

London
The local market for most DCMS-sponsored museums.

South East
The largest regional day visit market for London owing to geographical proximity and transport links.

Elsewhere in the UK
The wider domestic tourist market, and therefore a bellwether for wider tourism and economic trends.

International visitors

Europe: The largest international market visiting London. Europeans are more likely to be repeat visitors to both London and its museums, than other international audiences, and therefore typically have different motivations for visiting museums in London.

North America: Also a large market for London, with generally predictable seasonal visit patterns.

Elsewhere in the world: Featuring both long-standing tourist markets (e.g. Australia and New Zealand) as well as more 'emerging' markets such as India and China.

Hypotheses generation

The second stage of the research was to gather, articulate and categorise the range of hypotheses generated by sponsored museums, DCMS and MHM in relation to the fluctuating visit numbers over the past 15 years and the specific changes seen in origin markets.

72 hypotheses were raised and tested as part of this research. **External factors** are categorised by: political, economical, social, technological and environmental. **Internal factors** are grouped by: programme, marketing, experience, capacity.

See appendix (pages 71 to 75) for the full list.

Limitations on the ability to address all hypotheses

Budget
With a fixed budget, and a wide-ranging brief, inevitable prioritisation meant that there was limited scope for researching international visitors to London. While we interviewed and spoke to international tourists who were in London, we were unable, within the budget, to survey previous or potential international visitors to London either elsewhere in the UK or in their domestic context in order to understand differences in behaviour or perceptions.

Museum marketing spend and activity
The period covered by the study coincides with Government austerity measures which have directly impacted on museums. In some venues this is reflected in reduced marketing resources, but not in others. It has also been a time of radical change in terms of marketing communications with focus and budgets being switched from traditional above-the-line advertising increasingly to digital media.

Venue programming also has a direct relationship with marketing resources. It was therefore felt that, with so many variables at play, and the sensitivities of identifying examples of the positive or negative impacts of marketing spend, it would be too challenging to attempt to relate visit trends to any changes in the allocation of marketing resources.

Methodology

For further detail, see research parameters (page 87) and appended technical report

Situational analysis

1. Visit number analysis at sponsored museums [DCMS visits]
Of DCMS-sponsored museums, and others in the sector.

2. Audience trends at London National Museums [1] [LNM]
Audience demographics, museum visit history, engagement drivers.

3. Environmental analysis [2]
Examining external context - tourism trends, leisure time behaviour, cultural engagement research (e.g Taking Part) and previous MHM studies.

4. Econometrics analysis [ECON]
Statistical tools to establish if and to what extent external covariates (weather, consumer confidence) impact visit trends.

Hypotheses development

MHM and DCMS workshopped hypotheses based on:

- input from the sponsored museums
- analysis of audience profile data at sponsored museums
- recent research conducted in the sector

	Quantitative	Qualitative
International	**Survey of international tourists** [INT QUANT] [3] Target: International tourists in London Sample size: 511 Dates: June - July 2019	**Vox pops with international tourists** [INT QUAL] Target: International tourists in London Sample size: 70 Dates: June - July 2019
Domesitc	**England-wide population survey** [POP] Target: Adult population in England, in the market for days out in London and museums / galleries. Referenced as the London museums market. Sample size: 1,723 Dates: June - July 2019 *Comparable to a study conducted by MHM in 2017 with the same target population [POP 2017]*	**Domestic audience focus groups** [FG] Target: (1) London regular museum and paid exhibition attenders; (2) London family museum attenders; (3) London lapsed museum attenders; (4) Liverpool museum attenders; (5) Birmingham museum attenders Sample size: 30 Dates: July 2019

[1] MHM conducted rolling visitor research at a selection of the DCMS-sponsored museums from 2011/12 to 2018/19. Aggregated benchmarking data from this research is used in reference to audience profile. For the full list of included museums see page 76.

[2] References to secondary research sources are included in footnotes.

[3] Codes in brackets are used throughout the report as data references to the primary research e.g. [POP]

2. Background context and trends

- **Reported museum engagement broadly corresponds with actual visits**
- **Visits to London museums mostly in decline, with a few exceptions**
- **Museums outside London report significant growth in past two years**
- **Analysing trends and their relationship with audience groups**
- **DCMS-sponsored museum market sizing estimates**

Fluctuating visits to DCMS museums

Visits to DCMS-sponsored museums **climbed** continuously to 2014/15, **declined** for **three years**, before rising to an **all-time high** in 2018/19.

Analysis reveals that this recent recovery is **disproportionately attributable** to sponsored museums **outside London**. The more modest rebound in visits to London museums in 2018/19 was also largely due to high growth levels at just **two** of the sponsored museums.

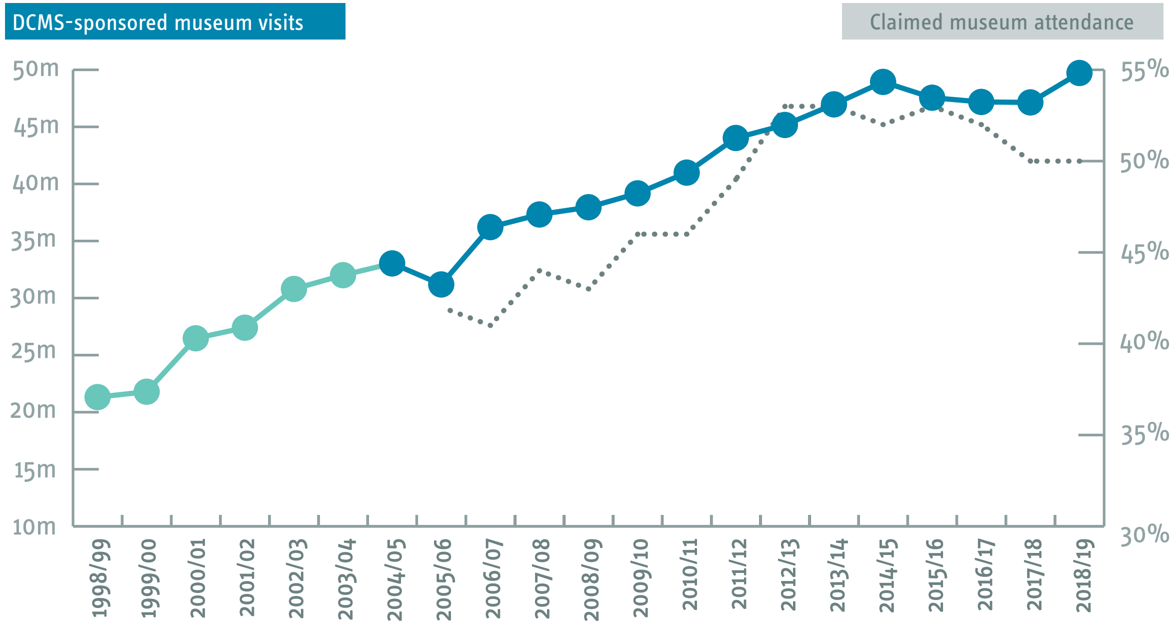
Analysis of other visit trends was required to help ascertain whether this was **exclusive** to the sponsored museums, or if there was a broader, **London**, or potentially **England-wide**, phenomenon.

Reported museum engagement broadly corresponds with actual visits

As previously stated, visits to DCMS-sponsored museums peaked in 2018/19 after year-on-year increases from 2006/07, with the exception of a three-year period of decline (2015/16 - 2017/18).

Attendance patterns broadly correspond with self-reported levels of public engagement with museums from the Taking Part survey. In 2005/06, 42% of the population in England claimed they had been to a museum at least once in the past 12 months, which rose incrementally almost every year, peaking first at 53% in 2012/13 and again in 2015/16 before falling slightly, and stabilising at 50% in 2017/18 and 2018/19.

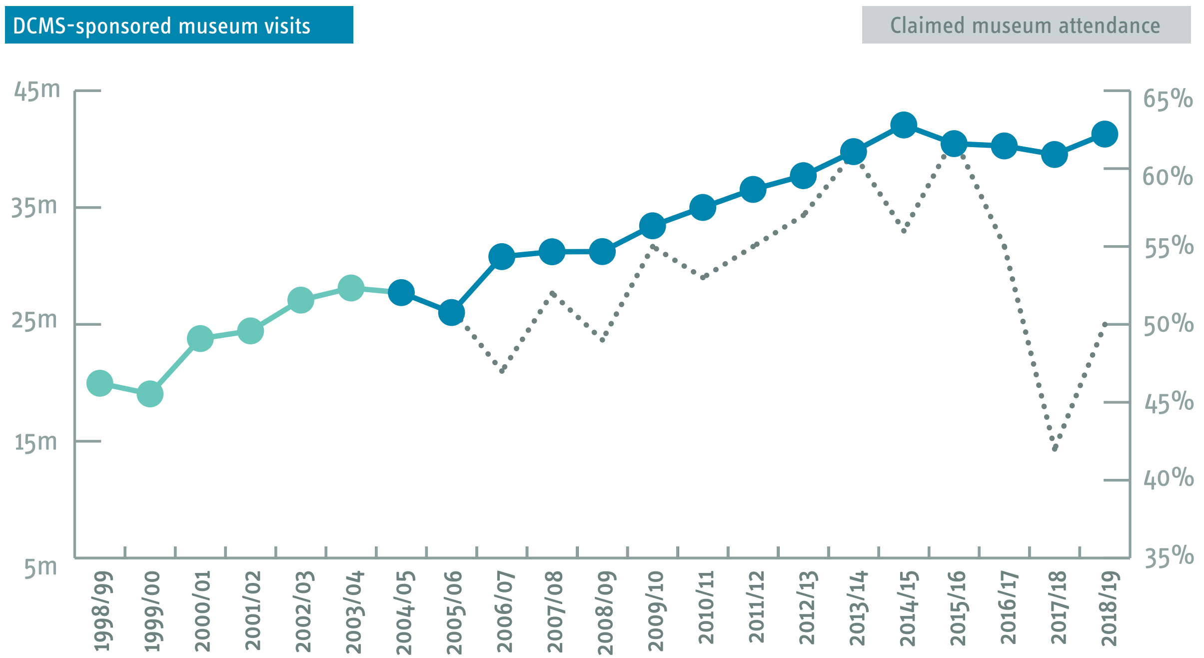
Visits to DCMS-sponsored museums **across England** since 1998/99, mapped against claimed museum engagement in the past 12 months [DCMS visit numbers and Taking Part survey data]



Data from **2004/05** is published on gov.uk. Data from **1998/99 to 2003/04** is not directly comparable, but is included to indicate the impact of free entry introduced at the national museums in 2001.

Taking Part asks the population to reflect on the previous year and is therefore a year out of step with actual attendance figures. The question is also focused on general attendance, not attendance at a museum in any particular geographic location.

Visits to DCMS-sponsored museums in **London** since 1998/99, mapped against claimed museum engagement in the past 12 months [DCMS visit numbers and Taking Part survey data]



Data from **2004/05** is published on gov.uk. Data from **1998/99 to 2003/04** is not directly comparable, but is included to indicate the impact of free entry introduced at the national museums in 2001.

Visits to London museums mostly in decline, with a few exceptions

The DCMS-sponsored museums in London account for the majority of visits across England (83% in 2018/19), and therefore drive the visit trends for all sponsored museums.

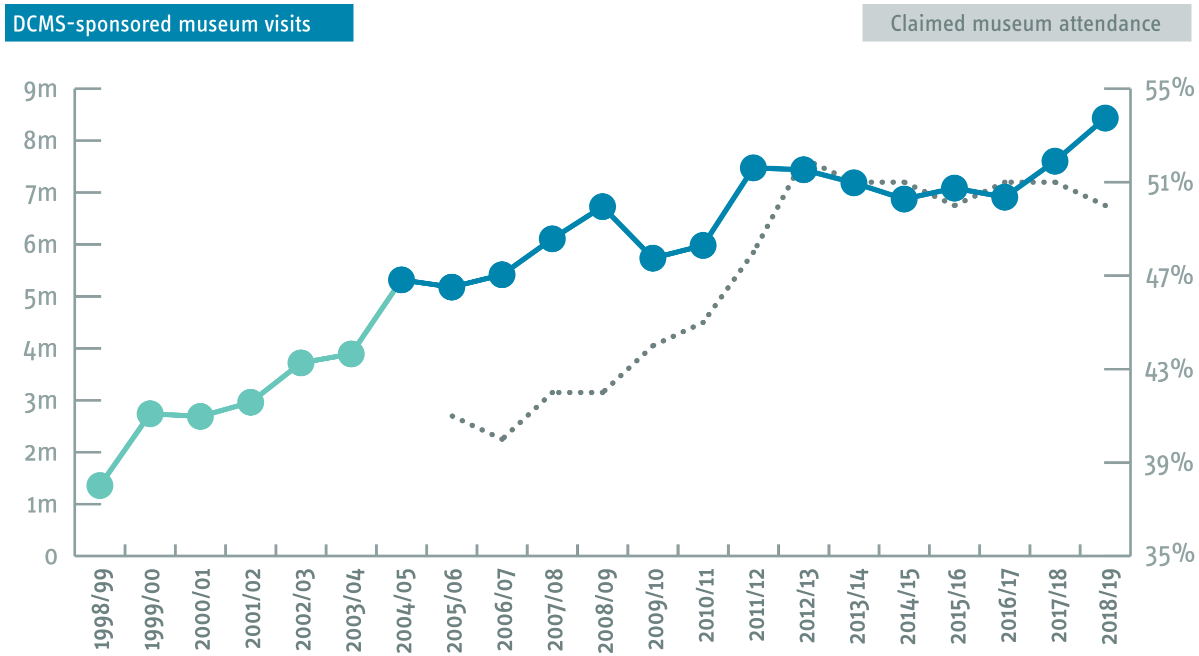
Visits peaked in 2014/15, followed by three years of decline. There was significant recovery in 2018/19, with the total number of visits (41.29m) exceeding all previous years apart from 2014/15 (42.06m). Between 2017/18 and 2018/19 alone visits grew by 1.75m.

However, this growth was not consistent across the London group. Most of the year-on-year growth experienced in 2018/19 was attributable to just two institutions who jointly gained 1.66m visits on the previous year. The remainder of museums in London saw minimal year-on-year gains, if any at all. This indicates that detrimental factors were still at play for some of the sector.

Londoners' reported museum engagement has been unstable since 2015/16

According to Taking Part data, reported engagement with museums among Londoners fell to a 12-year low in 2017/18 (42%) - most significantly falling from 62% in 2015/16. While this has rebounded to 50% in 2018/19, it could indicate a potential shift in Londoners' leisure time and cultural preferences, which is reflected, to some extent, in the visits numbers to DCMS museums in London.

Visits to DCMS-sponsored museums **outside London** since 1998/99, mapped against claimed museum engagement in the past 12 months [DCMS visit numbers and Taking Part survey data]



Data from **2004/05** is published on gov.uk. Data from **1998/99 to 2003/04** is not directly comparable, but is included to indicate the impact of free entry introduced at the national museums in 2001.

Museums outside London report significant growth in past two years

The picture at museums outside London shows a number of differences, particularly in the past five years.

Following a period of relative stability between 2011/12 and 2016/17, where between 7.0m and 7.5m visits were made each year, visits to DCMS-sponsored museums outside London (regional museums) rose significantly in both 2017/18 and 2018/19 (+1.52m in two years, +22%), exceeding all previous levels.

As a result, the recovery in visit numbers to DCMS-sponsored museums overall between 2017/18 and 2018/19 (+5%) (see page 16) is therefore disproportionately attributable to the regional museums (11%) rather than London (+4%).

This is partly attributable to several exceptional temporary exhibitions

Analysis of internal factors at the regional museums mostly contributing to this significant growth in visits suggests particular special exhibitions, programmes and initiative were primarily accountable. This includes programming connected to the First World War centenary, as well as national museum loan projects.

Rise in reported regional museum attendance data broadly reflects actual visits

According to Taking Part data, the proportion of those living in England, outside London, who reportedly visited at least one museum in the previous 12 months broadly corresponds with the rise in visits over the same period - from 41% in 2005/06 to 50% in 2018/19.

London DCMS-sponsored museum market sizing estimates

We can estimate that over half of the population of England (53%) have visited a DCMS sponsored museum in London in the past.[POP] This includes people who will have only visited as a child. Around 43% claim to have visited in the past five years. Over half (56%, or 31m) are interested in visiting in the future.

Whilst we must be cautious of overclaim here (population survey respondents misremembering how recently they visited, or incorrectly identifying venues) this points to high levels of penetration. Of those who are open to going to a DCMS-sponsored museum in London in the future, the majority have already been to at least one of the venues in the past (95%).[POP]

This means that 44% of the population are not in the potential market for DCMS-sponsored museum in London. This reflects the wider barriers identified in this report.

100% 56m

People in England
(including childen under age of 16)
[Mid Year Population Estimate, 2018]

Visit history

Have **ever** visited a DCMS-sponsored museum in London
[POP]
53% 29m

Have visited a DCMS-sponsored museum in London in **past 5 years**
[POP]
43% 24m

Future interest in visiting

Would visit a DCMS-sponsored museum in London in **future**
[POP]
56% 31m

Would **NOT** visit a DCMS-sponsored museum in London in **future**
[POP]
44% 25m

Estimates presented here based on claimed interest and past attendance at at least one of the DCMS-sponsored museums in London.[POP] Extrapolated from household population estimates [Office of National Statistics, 2017] to total population [Mid Year Population Estimates, 2018] using average party size of families (3.27) and adult only groups (1.1).[LNM]

3. Audiences gained, sustained and lost

- All origin markets contributed to 2014/15 peak, but have since diverged
- Drop in visits mostly attributable to Europeans
- North American visits grew almost continually
- Growth and retention of London visits
- Non-London domestic audience also contributed to the decline in visits
- Influx and departure of ‘mass market’ European audiences
- Domestic day visits to London are in decline
- Domestic overnight trips to London have been unstable
- European visits in decline, following a 2016 peak
- Non-European international visits have sustained growth for longer

Audiences gained, sustained and lost

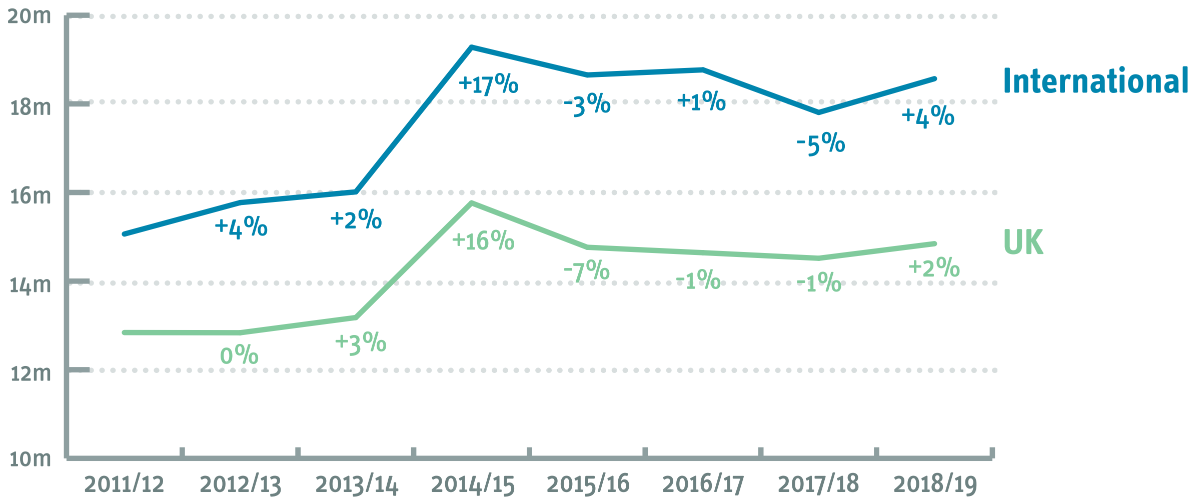
To understand what is **causing** the fluctuation in visits to London museums, it is first critical to analyse the visit **behaviour** of **domestic** and **international markets**.

London museums experienced **significant growth** in visits from **all** origin groups leading up to **2014/15**. Since then, North American visits have continued to grow; London and Rest of World visits have been sustained at this higher level; but visits from **Europe** and elsewhere in the **UK** have **dropped significantly**, returning to pre-2014/15 levels.

Data relating to visits from specific origin markets within this chapter is derived from MHM's national museums benchmarking group (between 2011 and 2019)[LNM]. See page 76 for the participating museums, most of which are in London.

Visits to DCMS-sponsored museums, by visitor origin

[LNM benchmarking data]



Diverging visits trends of UK and international visitors in past four years

Analysis of audience survey data[LNM] shows that visits to the national museums from international and domestic visitors broadly followed the same trend for the first part of the eight-year period, during which the benchmarking data was gathered. Despite the difference in audience sizes, both groups saw similar proportional uplifts and decreases year-on-year.

For example, both groups are equally accountable for the significant 2014/15 peak (internationals +16% and domestic +17%), matching the high point in visits at DCMS-sponsored museums in London (page 17).

Since 2014/15 the two markets have changed at different rates. Domestic visits fell significantly after the 2014/15 peak year (-7%), and have since remained relatively stable apart from a slight increase in 2018/19 (+2%). Whereas, the drop off in international visits was not so sudden following the peak year (-3% in 2015/16), but saw a steeper decline in 2017/18 (-5%) and steeper recovery in 2018/19 (4%).

All origin markets contributed to 2014/15 peak, but have since diverged

Splitting the international and domestic markets out further highlights where the museums audiences diverge more specifically.

The main point of consensus is that all markets contributed to the significant uplift in visits in 2014/15, creating the highest peak. Subsequent losses were experienced at different points in the following years, and at different rates.

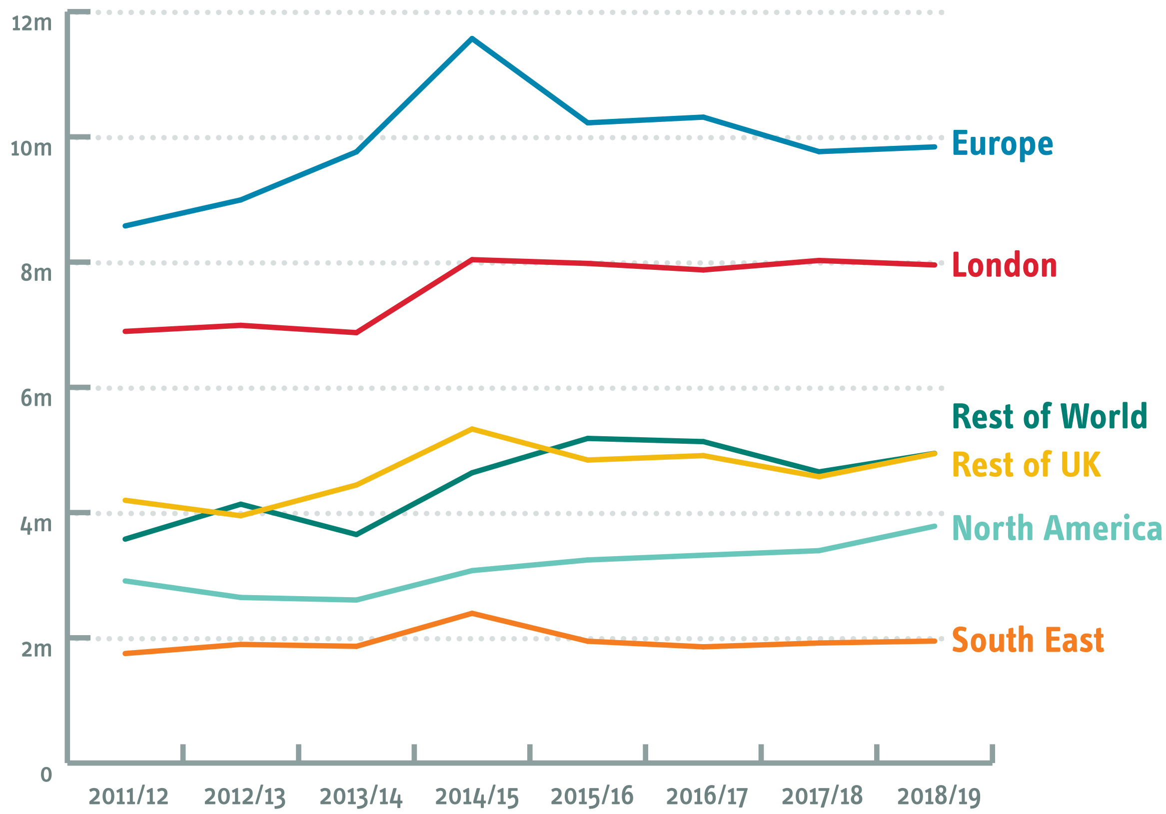
In contrast, the uplift of visits in 2018/19 was not universal across these markets. The year-on-year increase was mostly attributable to international visitors (as the model on page 21 suggests). This was predominantly driven by those from North America (+391k) and Rest of World (+296k), but less so from Europeans (+75k).

Drop in visits mostly attributable to Europeans

Europeans are the largest market for London national museums, typically accounting for around one third of visits. This market made the greatest number of additional visits leading up to the 2014/15 peak year (+3.04m, +16%). They also subsequently suffered the greatest loss following this peak (-1.72m). Data from 2018/19 suggests visits from this market have now stabilised (+75k).

Visits to DCMS sponsored-museums, by visitor origin

[LNM]



North American visits grew continuously

North American visits were the only audiences to continue to grow year-on-year in terms of visits to museums in the period following the 2014/15 peak year (2016-2018), gaining an additional 395k visits. This audience actually peaked in 2018/19 (3.78m).

Rest of world visits were gained and then sustained

Visits from the Rest of the world (those outside Europe and North America) saw the largest uplift relative to its size in the period leading up to the 2014/15 peak year (+26%, +2.04m). Since then, minimal year-on-year differences net off against each other and ultimately the gains made earlier in the period have been retained.

The picture among the three overseas audiences at London museums therefore broadly reflects wider tourism trends, as will be explored on page 27.

Growth and retention of London visits

Visits to the London museums made by those from London also grew in the lead up to 2014/15 (+2.15m) but have since then been the most static of any audience cohort.

Audiences gained, sustained and lost: all origin markets
[LNM]

Market	2014-16 v 2012-14		Result	2016-18 v 2014-16		Result
Europe	+3.04m	+16%	Gain	-1.72m	-8%	Loss
Rest of UK	+1.78m	+21%	Gain	-692k	-7%	Loss
South East	+577k	+15%	Gain	-563k	-13%	Loss
London	+2.15m	+16%	Gain	-117k	-1%	Sustain
Rest of world	+2.04m	+26%	Gain	-37k	0%	Sustain
North America	+1.07m	+20%	Gain	+395k	+6%	Gain

Non-London domestic audience also contributed to the decline in visits

Visits made by those from the South East and the Rest of UK (outside London) also grew (peaking in 2014/15), but have since declined.

After the 2014/15 peak year, South East visits declined sharply, reducing almost by the same amount (563k) that was previously gained (577k). Since this point, visits have remained static, similar to London.

Whereas, Rest of UK visits have seen a greater loss in the period following 2014/15 (-692k), owing to a significant dip in 2017/18.

SUMMARY

All markets contributed to the uplift towards 2014/15 peak, with markets respectively increasing between 15% and 26%.

Europeans, the London museums' largest market, account for the greatest drop in visits since the peak year (-1.72m).

Similarly, domestic visits from outside London also contributed to the decline (-1.25m South East and Rest of UK combined).

Influx and departure of 'mass market' European audiences

For the European market, who were accountable for the largest increase in visits between 2012-14 and 2014-16 (+3.04m) and decrease between 2014-16 and 2016-18 (-1.72m), this pattern was predominantly caused by those who would be classified as the 'mass market' - those on a **first-time visit**[1] to a particular London national museum and those motivated for **social** reasons. [LNM] See page 86 for a definition of visit motivation categories.

As the models indicate, both first-time visitors and socially-motivated visitors account for the largest proportion and number of visits to the national museums in the past eight years; therefore uplifts and decreases in visits from these audiences have a significant impact on visit numbers overall.

First-time national museums visitors*

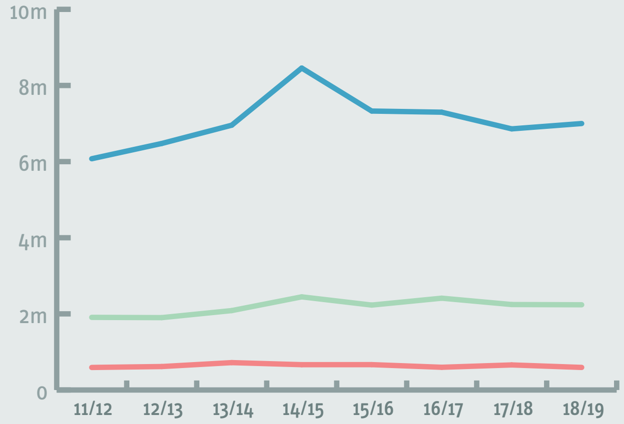
Visit number analysis in the three years leading up to the 2014/15 peak illustrates that this growth was driven by first-time visitors who accounted for 72% of visits during this period. In the following three years (2015/16 to 2017/18) visits from this cohort fell by 403k; whereas regular visitors fell by a smaller amount (-80k) and lapsed visits actually increased (+454k), helping to offset the loss of first-timers.

* All LNM audience surveys included the visit history question between 2011/12 and 2018/19. See page 76 for the full list of those included in this analysis.

Visits to DCMS-sponsored museums made by European visitors, split by:

[LNM]

a) Visit history to individual venues



1 This is aggregated data based on visit history to individual institutions, rather than the London National Museum group as a whole. There will naturally be a level of crossover in audiences, which was not accounted for in this methodology.

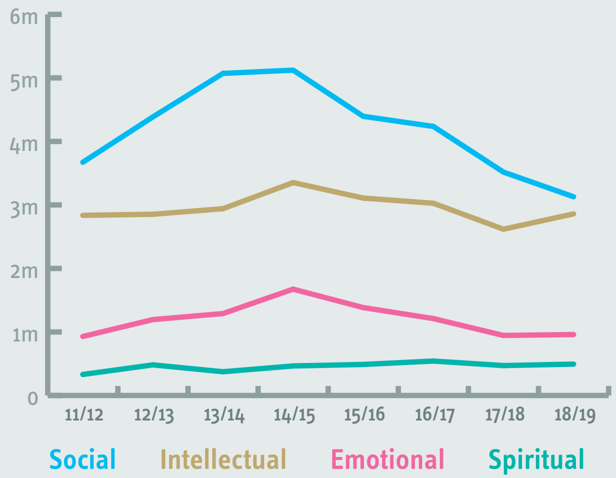
Socially motivated museum visits*

The growth and dissipation of socially-motivated visits shows a similar pattern, with visits growing steadily up to the 2014/15 peak year. In the three years after 2014/15, social museum visits were 2.4m lower (-17%) than in the previous three years up to 2014/15. While visits from those with other motivations (intellectual and emotional) also fell post-2014/15, they did not do so by such a significant amount.

* Not all LNM surveys included the main motivation question consistently throughout the period. The venues excluded from this analysis are: V&A, Museums of Childhood and the Science Museum.

Visits to DCMS-sponsored museums made by European visitors, split by:
[LNM]

b) Main visit motivation



For full descriptions of motivation categories, see appendix page 86

Age and vocational connection to museum subjects

Other visitor profile factors that broadly support this notion of the influx and departure of 'mass market' audiences include an increase in the proportion of visitors with a vocational connection to or specialist knowledge of related museum subjects (and corresponding decrease in those without) and a decrease in the proportion of visits from young adults (aged 26 to 34).

Increase in visits from previously underrepresented groups

However, not all gains have been made in audiences we would typically categorise as being in the 'culturally engaged' market. Some audience groups which have typically been underrepresented in museum attendance have increased between 2011/12 and 2018/19.

For example, the proportion of visits made to London National Museums from families has increased from 26% to 31% and the proportion of UK visitors self-identifying as being from a BAME ethnic background has increased from 16% to 19%. Ultimate visit satisfaction (% visits rated as 'excellent') has also increased from 60% to 67%.

Domestic and international tourism trends

Analysis of London **tourism trends** was required to ascertain whether the fluctuation in museum visits was **exclusive** to the sector, or the impact of a **broader**, London phenomenon.

Domestic day visits to London peaked in the **Olympic** year (2012), experienced a secondary peak in 2016, but have since been in decline, returning to the pre-Olympic level. Domestic overnight stays have been more **variable** with significant dips and peaks between 2014 and 2016.

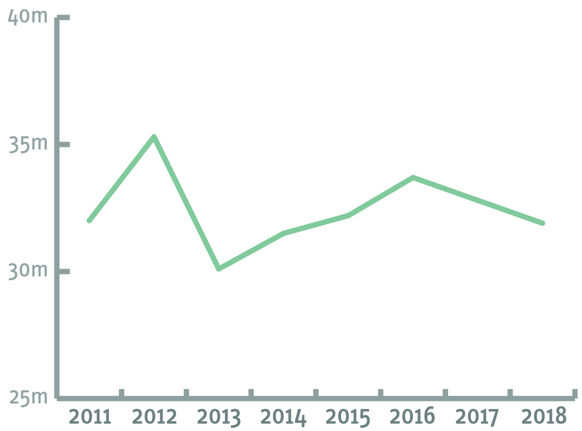
Fluctuations in **international visits to London** broadly **correlate** with the trends at museums. European visits saw significant increases up to 2016, and have since **declined**. Whereas, visits from other international markets have seen slow, but **continual**, **growth**.

Domestic day visits to London are in decline

London remains an appealing destination to visit (page 42), but high appeal levels aren't converting to high visit levels among the domestic market. Aside from the exceptional 2012 Olympics year, day visits to London peaked in 2016, before returning in 2018 to the level seen around 2014-2015, as well as the level seen pre-Olympics in 2011.[2] This trend broadly reflects the pattern throughout England, where domestic day trips in 2018 were at the lowest level seen in the eight-year period.

2 https://www.visitbritain.org/gb-day-visits-survey-latest-results

Domestic day visits to London
[Visit England: Great Britain Day Visits Survey]



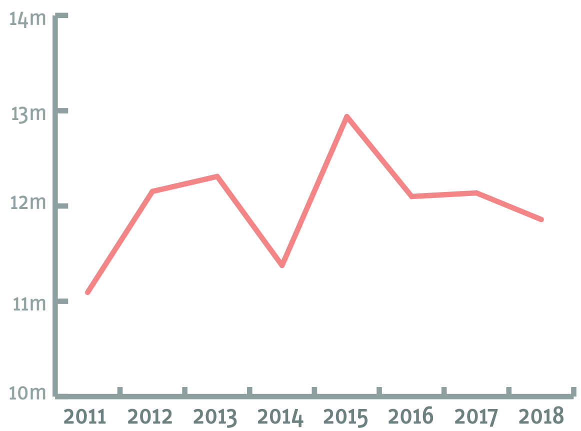
Domestic overnight trips to London have been unstable

The pattern in domestic overnight visits to London has been more variable across the period, most notably with a significant peak in 2015 (12.9m) following a dip in 2014 (11.4m).[3] This correlates with the peak in visits to London museums in the same period (2014/15) made by domestic visitors (page 21).

In 2018, 11.8m domestic overnight visits were made to London, which is down on 2017 by -2% and lower than all but two years since 2011.

3 https://www.visitbritain.org/great-britain-tourism-survey-latest-monthly-overnight-data

Domestic overnight stays in London
[Visit Britain: Great Britain Tourism Survey]



International visits rose continually from turn of the century

International tourism analysis uses ONS International Passenger Survey data.[4] This shows that international visits to London rose continuously from 1998.

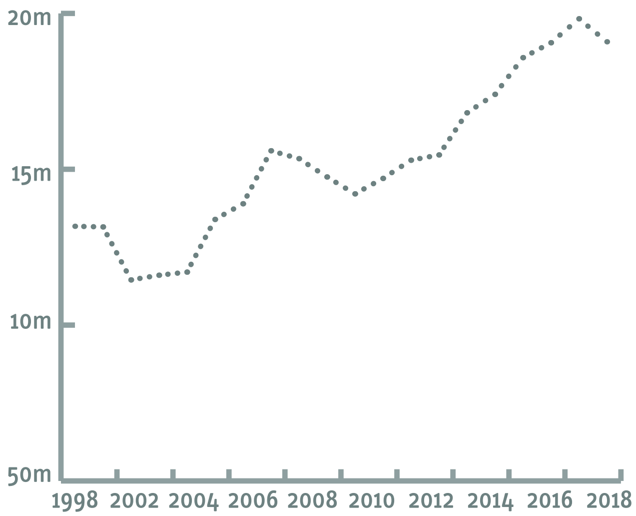
The years leading up to the turn of the century saw two major changes that would have influenced overseas tourism to the UK and London: the deregulation of the airlines industry and with it the introduction of low cost airlines that made flights between the UK and Europe far cheaper, as well as the introduction of the internet, enabling ease of booking.

European visits in decline, following a 2016 peak

International tourism data split by continent shows that Europe is by far the largest market for London.[5]

4 https://www.ons.gov.uk/surveys/informationforhouseholdsandindividuals/householdandindividualsurveys/internationalpassengersurvey

International visits to London: overall
[International Passenger Survey data]



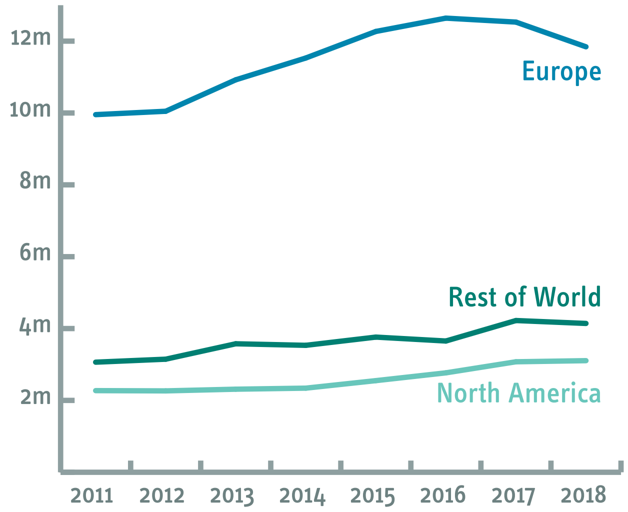
The number of visits to London from Europeans rose steadily from 2011, peaking at 12.6m in 2016. Since then visits have fallen to 11.8m in 2018 (-6%). Whilst in decline, visits from Europeans remain by far the largest proportion of international visits made to London.

Non-European international visits have sustained growth for longer

In contrast, visits to London by those from North America and Rest of World have continued to grow. However, in 2018 there are signs that these markets are stabilising. North America visits grew by 803k (+35%), from 2.3m in 2011 to 3.1m in 2017, but then stabilised in 2018.

Similarly, Rest of World visits rose by 1.2m (+38%) over the same period, but then actually decreased by 2% between 2017 to 2018. This is a small difference, but indicates a potential change in the market environment.

International visits to London: split by key markets
[International Passenger Survey data]



International visits to London (according to International Passenger Survey data) are available back to 1998. However, the split showing the origin of visits (e.g. Europe) is only available from 2011.

4. The external factors impacting on international visits to London

- Olympics boosted perceptions of UK as a welcoming place
- However, the current political climate is changing perceptions
- Brexit is increasingly likely to deter international visits to the UK
- GBP value helped sustain non-European visits in particular
- Terrorist incidents had short term negative impact on perceptions

Europeans' perceptions of Britain change

There are a number of trends and factors impacting on **international** visitors, particularly the decline in **European** visits.

Perceptions of Great Britain's **cultural assets** remain as **positive** as ever; however wider perceptions of Britain as a place to visit are **increasingly negative** among **Europeans** as a consequence of Brexit.

Note: The three main secondary sources referenced in relation to perceptions of the UK / Britain are focused on different territories. Therefore the terminology used in this section reflects references to these sources.

- The Anholt Brand Index measures the reputation of the United Kingdom

- Visit Britain 'How the world views the UK' is related to the United Kingdom

- Visit Britain 'Inbound consumer sentiment research' is focused on Great Britain.

Olympics boosted perceptions of UK as a welcoming place

Anholt Brand Index[1] data indicates that perceptions of the UK as a 'welcoming place' peaked in 2013, following the London Olympics in 2012.

The London Olympics represented a massive, world-wide marketing awareness-raising and promotional campaign. The increase in visits from mass market audiences leading up to 2014/15, and the subsequent fluctuations, likely reflected the legacy effect of this endeavour.

The promotion of London as a 'must-see' destination elicited additional visits from a world-wide mass market on top of the usual visits by those more typical of cultural tourists.

And ratings of the UK's cultural and tourism attributes are consistently high

Overall the UK is currently ranked 4th out of 50 nations in the Anholt Brand Index (2018) which has varied little over the past eight years.[2]

1 https://www.ipsos.com/en-us/news-polls/Germany-Retains-Top

2 https://www.visitbritain.org/britain%E2%80%99s-image-overseas

The London Olympics in 2012 served as a promotional campaign for London, from which the cultural and leisure sectors benefitted.

Ratings for tourism and culture are among the UK's strongest assets (rated 4th respectively). More specifically, perceptions of the UK's contemporary culture remain high (ranked 3rd / 4th since 2008), with museums being the cultural product most readily associated with the UK.

However, the current political climate is changing perceptions

In 2018, the UK was ranked 15th (out of 50) for 'if visited, people would make me feel very welcome' – a drop of five places from 10th position in 2013, following the Olympics.[3] This drop is primarily driven by a decline in perceptions among Europeans. This is in contrast to the rest of the world; with perceptions particularly positive among North Americans and Chinese visitors, two of the UK's largest tourist markets after Europe.

As of March 2019, Britain's net reputation is **negative**: with more people saying 'my view has become much more negative following the UK's decision to leave the EU' (+6% net), which is driven by Europeans (+15% net).[4]

In contrast, the UK's decision to leave the EU has appeared to have a net **positive** effect for markets outside Europe, particularly China and USA.

Individuals from these markets are more likely to say their view of the UK has become more positive following the referendum (+36% and +11% respectively).

Ultimately, Brexit is increasingly likely to deter European visits

As of March 2019, most international markets stated their likelihood to visit Britain has not been affected by Brexit (59%). Net likelihood to visit remains positive (+6% more likely to visit). But this has decreased significantly since August 2016 (16%).[5] Again, the picture across the key international markets varies greatly.

Europeans are now 2% (net) less likely to visit following Brexit; whereas results in August 2016, immediately following the result, were still positive (+8% more likely to visit).

For non-European markets, the UK's exit from the European Union is more likely to make them visit, particularly in China (+48%) and the USA (+15%) to a lesser extent.

This reflects a prevalent finding from the primary qualitative research conducted as part of this project. International visitors in London reported that freedom and ease of movement for Europeans is a primary concern going forward, as a consequence of the UK leaving the European Union. (Note: at the time of research, the exact date and plan of exiting was not confirmed.)

'I think Brexit will probably affect – not the experience within the city, but mainly probably the airport control and the airport experience for tourists. That's important for a person who likes to travel easily. That can be a deterring factor.'

[INT QUAL, Portugal]

3 https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/how_the_world_views_the_uk_2019.pdf

4 https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/consumer_sentiment_research_for_website.pdf

5 https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/consumer_sentiment_research_for_website.pdf

GBP value helped sustain non-European markets

Visit Britain research shows one fifth (21%) of internationals who have visited Britain since July 2016 said the value of GBP strongly influenced their decision to travel.[6]

Value of sterling is most likely to strongly influence USA visits (34%), and also China to a lesser extent, but still above average (25%).

While the value of the Euro has fluctuated significantly against the pound in recent years, GBP value is no more likely to influence European visits (18%) than the average (21%), indicating there are other, more important, factors at play.[INT}

First-timers more inclined to visit when the exchange rate is in their favour

Our on-street survey of international visitors in London in June-July 2019 highlighted that 38% are more likely to visit the UK when the exchange rate is in their favour (34% net more likely). In particular, first-timers to London say they are more likely to visit as a result of favourable exchange rate (48% net) than those who had been to London before (27% net).

Young people more exchange rate influenced

This survey also showed a correspondence between age and propensity to visit based on the exchange rate. Younger visitors - such as those aged 16 to 24 - were more likely to agree that they visit when exchange rates are in their favour (42% more likely to visit) than older visitors - such as those aged 45 to 54 - (30% more likely to visit).

Mixed perceptions of Britain offering good value for money

Half of internationals consider Britain as offering good value for money (45% March 19), which has been relatively stable since April 2017. As with other metrics, perceptions of value for money are more positive in China (76%) and USA (53%) than Europe (39%).[7]

Therefore, this is likely a significant contributing factor to the grown North American and sustained Rest of World markets post-2014/15, and in particular post-EU referendum.

6 https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/consumer_sentiment_research_for_website.pdf

7 https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/consumer_sentiment_research_for_website.pdf

-800k

Fewer visits to London made by Europeans from 2016 to 2018.

+15%

Europeans' perceptions that 'my view has become much more negative following the UK's decision to leave the EU'.

-1.7m

Fewer visits to London DCMS museums from Europeans between 2016-2018 versus 2014-2016. As this is greater than the difference in overall European tourist visits to London it suggests visitors were spending their time in London differently.

Analysis of Britain's declining **reputation** among Europeans correlates with a decline in **visits** to London by Europeans, which correlates with a decline in visits to DCMS-sponsored **museums** in London.

Terrorist incidents had short term negative impact on perceptions

For international visitors to London, the impact of terrorist related incidents has been mostly short term.

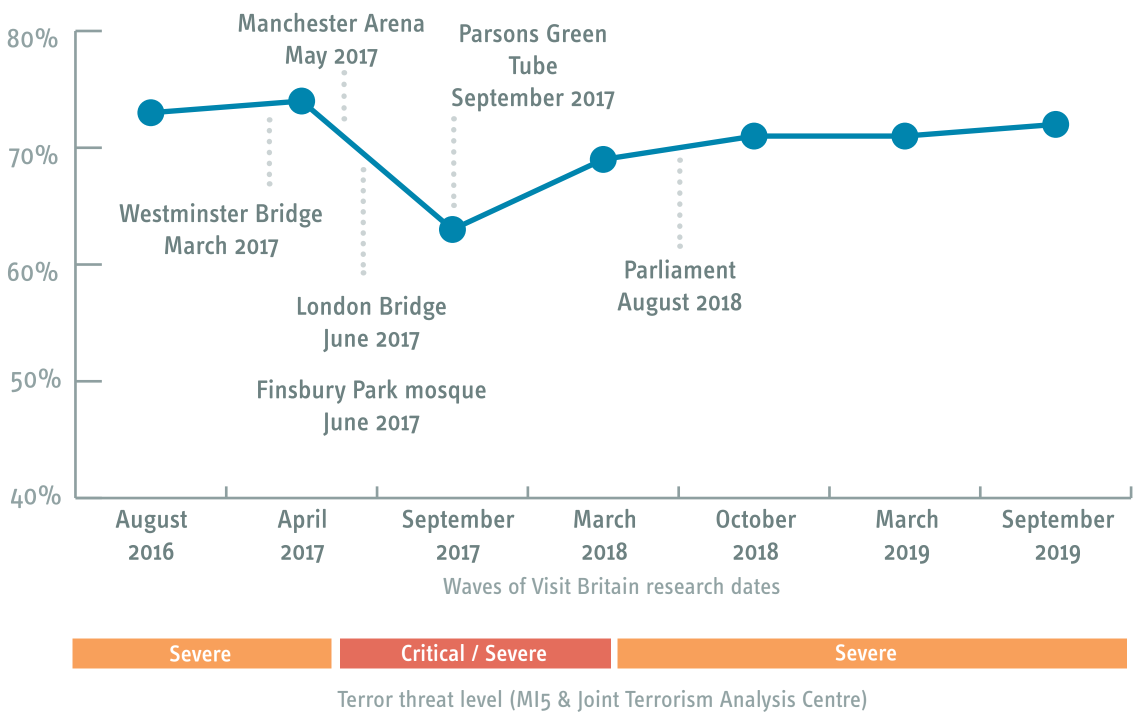
Perceptions of Britain as a safe and secure destination are currently as positive as they were in 2016, according to Visit Britain research over this period. Research conducted in September 2019 shows 71% of people surveyed living outside the UK agreed it was a safe and secure destination to visit, consistent with 72% in August 2016.[8]

However, in the intervening periods, the repeated research waves show a significant dip to 63% in September 2017 in light of several terrorist attacks in London and Manchester.

During this period MI5 and the Joint Terrorism Analysis Centre categorised the UK's threat level as 'critical' in the immediate aftermath of incidents, which returned to 'severe' typically after one week.[9]

Level of agreement that Britain is a **safe and secure destination** (among internationals)

[Visit Britain: Inbound consumer sentiment research]



8 https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/consumer_sentiment_research_for_website.pdf

9 https://www.mi5.gov.uk/threat-levels

However, this downturn in perceptions proved to be relatively short term, as perceptions of UK safety among international markets recovered from March 2018 (69% agree) and subsequently remained relatively stable.

'On our trip last year some parents of our students didn't allow them to go to London. This year it's not a problem because nothing happened.'

[INT QUAL, Germany]

Ultimately, terrorism doesn't deter most from visiting London

Qualitative research conducted with tourists in London [INT QUAL] illustrated that most hadn't or wouldn't change their travel plans due to terrorist incidents in London and the UK. The most common reasons given for this were that terrorism is a threat in almost all major cities worldwide, as well as a desire to prevent terrorists from 'winning' by avoiding certain places through fear.

'If we stopped travelling or stopped visiting places like this one, terrorists will win. We cannot accept this. We have to continue like nothing happened.' [INT QUAL, Italy]

'It's something that doesn't just happen in London. It can also happen in Spain, as happened a few years ago. I don't think I have to fear travelling just because of that, because it can also happen in my city.' [INT QUAL, Spain]

'I have a bit of reservation. You can't live under the perception that it's going to happen every time. You have to live.' [INT QUAL, Ireland]

And most would not alter their behaviour when in London in light of recent incidents

Similarly, most international visitors in London would not amend how and where they spend time. A minority who did amend their behaviour in light of recent terrorism events were most likely to say they would avoid particularly busy tourist sites.

'I'd think twice about going to the London Eye or the Tower of London. I'd rather go to more obscure places. We try to avoid the big, obvious places, I suppose.' [INT QUAL, Australia]

But measures to protect people, in London particularly, such as concrete bollards along bridges and busy stretches of pavement are noticeable and help reassure international visitors.

'[The terrorist incidents] received a lot of media attention. So I'm a little bit more aware. You see the bollards up, so that's a safe place to sit down.'

[INT QUAL, Australia]

'When you stroll around you see concrete blocks and so on to prevent cars driving on the sidewalks. So [the threat of terrorism] doesn't affect plans, but you just see it.' [INT QUAL, Denmark]

Note: this primary research was conducted with international visitors in London in July 2019 [INT QUAL] and therefore does not capture the attitudes and perceptions of those NOT in London.

Capturing responses from this latter cohort was out of the scope of this project - but it is possible that they hold more negative perceptions of the UK and are less likely to visit for these reasons.

5. The external factors impacting on domestic visits to London

- Fall in Central London visit frequency across England
- Economic barriers have most commonly deterred visits
- Busyness of Central London is most prevalent social barrier
- Concerns in relation to terrorism spike in the wake of incidents

Economic factors deter domestic visits

The high volume and significant **fluctuation** in visits to sponsored museums in **London** warrants exploration into **perceptions** of and **barriers** to visiting **Central London specifically**, among the population, as well as broader trends particularly affecting the domestic market.

Change in visit frequency to Central London appears to be most connected to **economic factors** - from people generally feeling they have **less disposable income**, to more specific costs associated with **travel**, **accommodation** and **subsistence** in Central London.

Data on barriers to visiting Central London is primarily drawn from the England-wide population survey [POP] and focus groups with domestic audiences [FG].

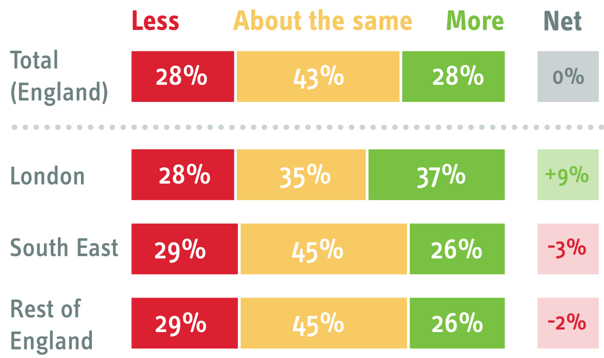
Fall in reported Central London visit frequency across England

Those in the London museum market overall in England report little or no change in their visit frequency to London for leisure in the past three years; 28% say they visited more often in the past three years than they used to which nets off against the 28% who feel they have visited less often (net 0%).[POP]

However, the picture is significantly different among more specific domestic audience cohorts.

Those living in Greater London say they visited Central London for leisure more often in the past three years than they used to (+9% net more often). By contrast, the net effect is negative among those from the South East / East of England (-3%) and the Rest of England (-2%), reflecting the drop in visits to museums from this cohort (page 22).

'Over the past three years, would you say you have generally visited Central London for leisure...'
[POP]



[Base 1406; 268; 452; 686]

Economic barriers have most commonly deterred visits

There are a number of barriers cited as reasons for visiting Central London less frequently in the past three years. Economic factors relating to general levels of **disposable income**, as well as more specific visit-related costs such as travel, were most common.[POP]

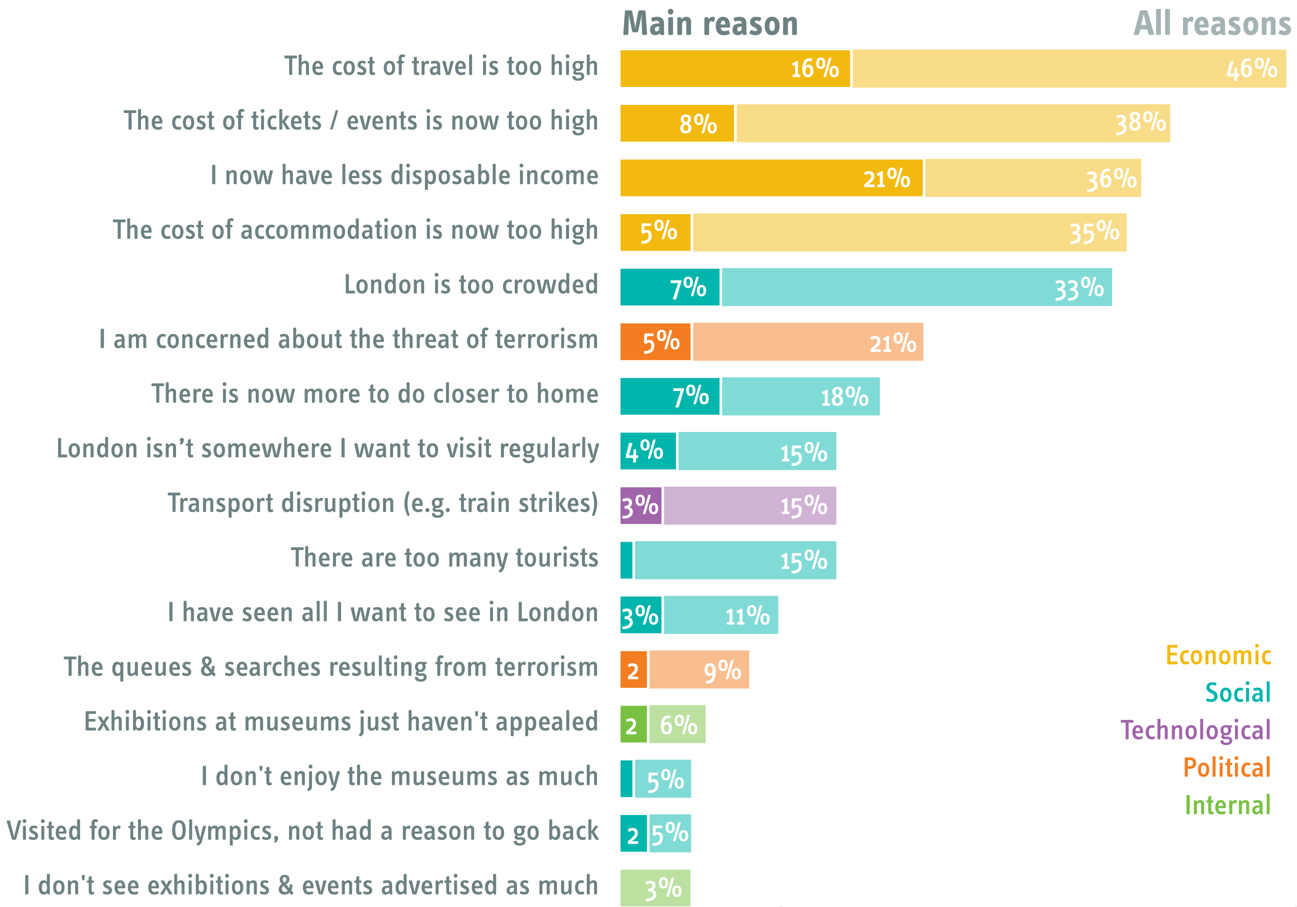
Cost of travel is most common barrier

The cost of **travel** to Central London is the most frequently mentioned reason for visiting less often in the past three years (46%), and is understandably a more prevalent barrier for those living outside Greater London (49%).

Similarly, the cost of **accommodation** and perceived cost of admission to **attractions** are increasingly prevalent deterrents to visiting Central London. Compared with a similar study conducted in 2017, these are the two barriers to visiting London that have **increased the most**.[POP 2017]

In particular, those living in the South East and East of England feel the squeeze in terms of entertainment costs - they are more likely to visit less often owing to the price of events and attractions (49%) than the average (38%).

'Which, if any, of these describe why you have visited Central London less often over the past three years?'
[POP]



[Base (visited London less often in past three years), 400]

Travel disruption has also affected the domestic audience, particularly South East

15% of respondents cited travel disruption as a reason for visiting Central London less frequently in the past three years.

While there were no significant differences on this metric by region, the South East, in particular, was faced with ongoing industrial action on the railway network since between 2016 and 2019.[1]

London has increasingly faced competition with European city breaks

As the average cost of flights is currently at one of the lowest points in history, combined with increasing rail prices within the UK,[2] London has increasingly faced competition for domestic visits with other European cities.

1 https://www.bbc.co.uk/news/uk-england-41481821
2 https://www.independent.co.uk/travel/news-and-advice/rail-fares-increases-train-london-travel-ticket-season-a8707526.html

A recent study classified London as one of the most expensive destinations for a city break.[3] Whereas, destinations in Eastern Europe, in particular, were regarded as the most affordable (e.g. Vilnius, Belgrade and Warsaw).

'Travelling to London – if you factor in the train tickets, your hotel, your food and your entertainment, it is pretty expensive. You can probably go on a weekend to Europe for that.'

[FG, Liverpool museum attender]

3 https://www.telegraph.co.uk/travel/news/cheapest-city-breaks-prices-fall/

People consider alternative city breaks in UK, if leisure preferences allow

The associated costs of trips to London can be so significant for some that they would consider travelling to another city in the UK, particularly if there was an option to do the same leisure activity.[FG]

'If I am going to watch a big band now we look at going to Glasgow instead [...] because of the cost of going to London and the price of a pint or the price of some food [...] it is so cheap up there.'
[FG, Liverpool museum attender]

This is reflected in recent research conducted on the relationship between London and the regions. 'Expensive' was the most commonly cited word used to describe London by those who visit London at least once a year and those who do not.[4]

4 https://www.centreforlondon.org/publication/london-uk-capital-country/

Continuing lower level of consumer confidence

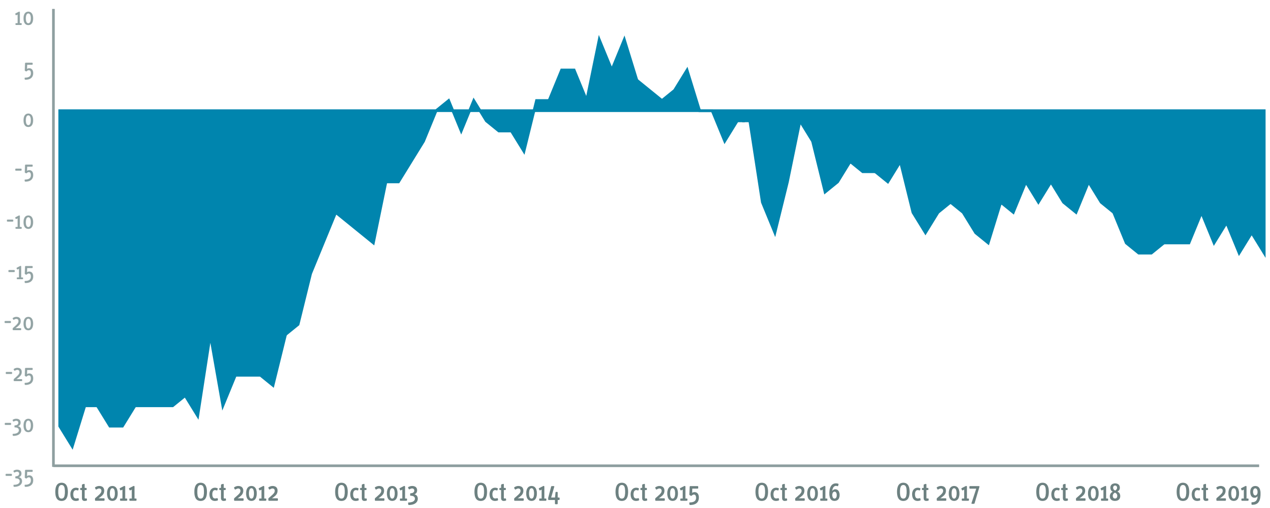
Given the prevalence of economic factors reportedly deterring people from visiting London, analysis of consumer confidence trends provides useful context.

As of October 2019, UK consumer confidence was at the lowest level (-14) since July 2013 (-16).[1]

However, there is disparity in perceptions of personal financial situation and those of the general economic situation. Perceptions of personal situations remain positive, and have remained stable since December 2013. Whereas, perceptions of the wider general economic situation are much less positive, and have been continually decreasing since peaking in spring 2014.[2]

1 https://tradingeconomics.com/united-kingdom/consumer-confidence
2 Visit England Tourism Trends, October 2019

Consumer Confidence Index Score (eight-year trend)



Visits patterns correlate with economic performance

Whilst still low, consumer confidence was at its highest in the past ten years in 2014/15, corresponding with the peak in visits to museums. The decline in consumer confidence following this peak correlates with the decline in museum visits. As illustrated on page 63, econometrics analysis found a significant correlation between the health of consumer confidence and inflation rates with visitation patterns at museums.

Busyness of Central London is most prevalent social barrier

Those who find Central London less appealing than they did five years ago are significantly more likely than the average to cite barriers to visiting connected to busyness: 'London is too crowded' (56% v 33%) and 'there are too many tourists' (25% v 15%).[POP]

'I often try to avoid central London just because it's quite tourist-y as well. If I do find something to do, I prefer it to not be in central. Maybe just on the outskirts.' [FG, London, lapsed museum attender]

However, while the busyness of London was a contributing factor for visiting Central London less often for one third (33%) of respondents, it was only the main deterrent for a minority (7%).

Qualitatively, non-Londoners frequently mention the busyness of London - it appears to be a downside to their experience, but only a soft deterrent.[FG]

'I have a bit of a love and hate relationship with London, the centre is so busy and the hustle and bustle and the Tube especially in the summer.' [FG, Liverpool museum attender]

Londoners are more likely to avoid overcrowded tourist hotspots

Over half of Londoners (53%) reportedly avoid busy areas or attractions in Central London, compared to just one third (34%) of those from elsewhere in England. Londoners are therefore increasingly selective about where they do and don't visit depending on how touristy areas are.[POP]

Concerns relating to terrorism spike in wake of incidents

For domestic markets, terrorism appears to be a contributing, but not determining, factor in declines in visits, similar to those from overseas.

One fifth of those who visited Central London less frequently in the past three years referenced concerns around terrorism (21%), though this was a main reason for just 5%, again indicating this is more a consideration than a major deterrent.[POP]

Those who currently find Central London less appealing than they used to are more likely to cite terrorism as a factor for visiting less often than the average (30% v 21%), but this represents a small proportion of the overall market.

A comparative study in 2017 shows that terrorism was more commonly cited as a main reason for visiting less frequently (-5 percentage points). This is perhaps unsurprising given the earlier study was conducted shortly after the Westminster Bridge and London Bridge / Borough Market incidents.[POP 2017]

Analysis of daily visit figures at several London museums around the time of terror incidents shows similar short-term dips in visits, but little longer-term effect.[LNM] Therefore, the impact of terrorist incidents is not wholly accountable for fluctuations in visits to DCMS-sponsored museums in London, but instead a contributing factor which fluctuates in significance corresponding to incidents.

6. Wider trends impacting on leisure choices

- Has an Olympic legacy impacted on visits?
- ‘Brand London’ is as appealing as ever
- Promotion of England’s regions may have pulled visits from London
- Museums face more fragmented competition in the wake of the experience economy
- Search engines and social media enable access to a wider choice of leisure activities
- Discount vouchers increasingly dictate, not just facilitate, leisure activities
- Ethical consumerism trend asks museums to reappraise
- Museums in London are still a top priority, though domestics’ reported visit frequency is down
- Longer international visits more likely to include museums

Has an Olympic legacy impacted on visits?

As non-Londoners' perceptions of the capital's appeal is relatively neutral, and their reported visit frequency is down, it is possible that the significant uplift in visits in 2014/15 and subsequent tail off is connected to the **halo effect** of the **London 2012 Olympic Games**.

As previously cited, the 2012 Olympics **boosted overseas perceptions** of London, which have since been disrupted by **Brexit**.

Similar patterns are true of **domestic** audiences. The **positive glow** of the Olympics brought people to visit, but some have since lacked the **incentive to return**.

Meanwhile high profile **advertising campaigns** have encouraged domestic and overseas visitors to **visit elsewhere in Britain**.

Quarter of the London museum market was in London during the Olympics

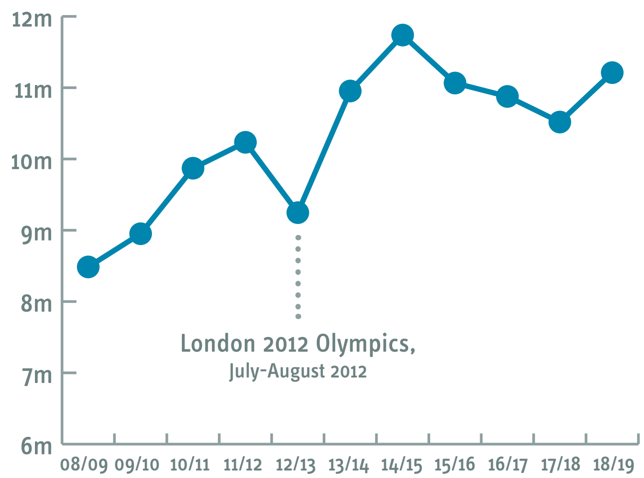
Almost a quarter (23%) of those in the London museums market visited London during the Olympics / Paralympics - 15% as a spectator or volunteer and 8% were in London but did not attend any events.[POP] Of those who visited London during this period, 14% of the London museum market said they were visiting London for the first time and 16% for the first time in more than five years.[POP]

Activation of these first time visitors and reactivation of the lapsed visitors could therefore be connected to the widespread promotion of London during this period. The Olympics provided an appointment to visit London for some, but for others, it generally boosted the appeal of London, leading to visits well after the games had finished. As such, the Olympics can be considered as a successful advertising campaign for London generally.

London museums visits dipped in Quarter 2 2012/13, likely due to the Olympics

London DCMS-sponsored museums experienced a significant dip in visits during Quarter 2 2012/13, breaking the upward trajectory of previous years. While the level of visits during Q2 2013/14 continued this growth trajectory, the dip in 2012/13 demonstrates that the Olympics, which took place during July/August 2012 had a short term negative impact on museum engagement in Central London.[1]

Visits to DCMS-sponsored museums in London in Quarter 2
[DCMS visit numbers]



1 https://www.aperianglobal.com/social-cultural-impacts-hosting-olympic-games/

‘Brand London’ is as appealing as ever

Overall, London as a destination and brand still holds strong appeal among the London museums market throughout England.

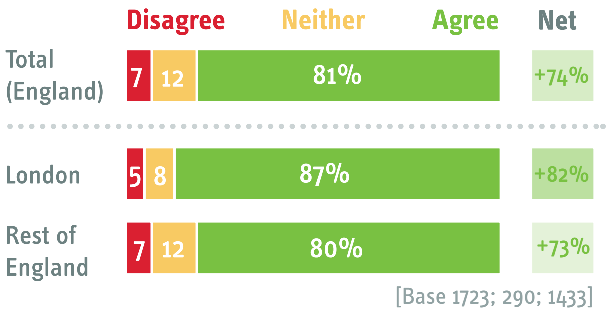
The net result of London’s appeal is significantly more positive among Londoners (82%) than those living elsewhere in England (73%), as is to be expected.

Five-year positive change in appeal of London

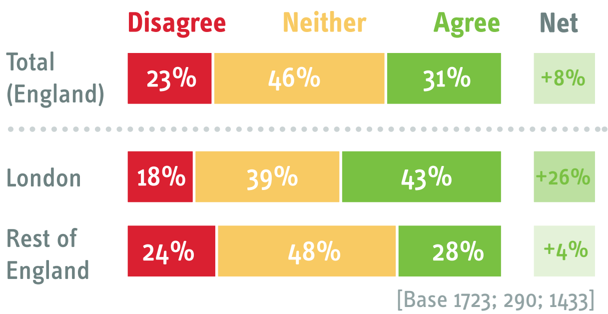
A follow up question on the appeal of London asked the extent to which respondents agreed or disagreed that London is more appealing than five years ago.

Almost one third of those in the London museums market agreed ‘London is more appealing than five years ago’ (31%), compared to 23% who disagree, resulting in a +8% net effect.

To what extent do you agree ‘London is an appealing place to visit’?
[POP]



To what extent do you agree ‘London is more appealing than five years ago’?
[POP]



Again, there is a noticeable difference between London and the regions in perceptions of change. Londoners are 26% (net) more likely to think London is now more appealing than five years ago, compared to 4% (net) across the rest of England. But this still demonstrates that London continues to hold appeal throughout the country, and negative perceptions are in the minority.

For some, the positive legacy of London 2012 has since been tainted by Brexit.

‘Everything that London 2012 achieved just disappeared now with Brexit […] all the goodwill, all the feel-good thing. [2012] was peak London.’

[FG, London lapsed museum attender]

However, ‘appointments to visit’ are now being made across the regions

London remains appealing, but the natural dissipation effect after the Olympics and tangible factors blocking visits to the capital (primarily economic) have reduced the inflow of tourists.

At the same time, interventions have been made that more actively pull visits away from London, most notably the promotion of Great Britain’s regions, capitalising on the positive perceptions generated by the Olympics.

In particular, the **GREAT Britain** campaign’s remit was to extend the legacy of London Olympics and the Diamond Jubilee by promoting the whole of Great Britain internationally[2]. The four-year £100 million match funded marketing programme likely had an impact on tourist perceptions and behaviour.

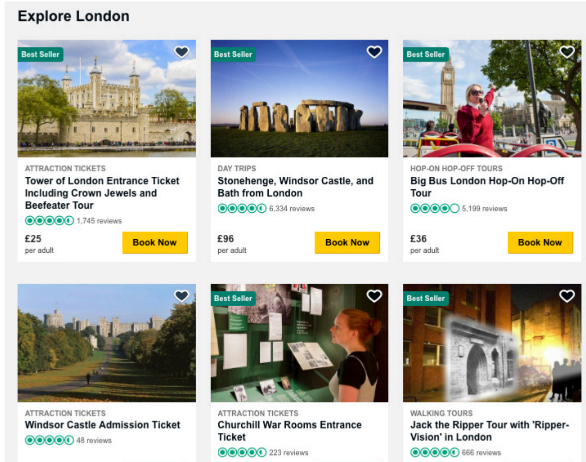
The success of the initial campaign was then extended with further investment in the **#OMGB** campaign. Encouraging both international and domestic tourists to explore beyond London.

It was also recently confirmed that the **Discover England Fund** will be continued into a fifth year (2020/21), with £5.45m to continue supporting large and small scale projects across England.[3]

One third of international visits include travelling outside London

Our survey of international tourists in London highlights that one third (33%) of visitors also visit places outside London while in the UK, which could contribute to the fluctuation in visits at London museums. Those visiting from North America are more likely to do this (48%), reflecting their longer stay. [INT QUANT]

A TripAdvisor search of ‘things to do in London’ mixes Central London attractions with day trips to places elsewhere in the South of England, such as Bath, Windsor and Stonehenge, contributing to drawing more international visitors out of London.



While the majority of the London museums market find London appealing, and overall more so than five years ago, the pull of exploring other places in England, likely encouraged by tourism campaigns, means London has faced increased competition.

London benefited from the significant promotion in the period before, during and immediately after the 2012 Olympic and Paralympic games. However, this halo effect has since waned to some extent.

As a result it seems to follow that museums have felt the impact of these wider trends.

2 http://www.greatbritaincampaign.com/#!/about

3 The Voice for England, Andrew Stokes, (Visit England)

Wider trends influencing leisure choices

In addition to the more tangible factors at play, such as the economy, Brexit and tourism, there are also particular **meta-factors** or trends that drive and deter visits to London, and DCMS-sponsored museums **as a result**.

These stem from **social trends**, such as the thirst for **authenticity** and **experiences**, rather than interventions from within the museum sector.

People make more time for leisure than ever

The perceived amount of time for leisure activities is currently positive. Those in the London museum market claimed they have had more time for leisure in the past three years than before (+16% net). Those living outside of London are less likely to report having more time for leisure than those in London (+16% versus +19%).

Perceived amount of time for leisure, compared to three years ago
[POP]

	Less	About the same	More	Net
Total (England)	15%	54%	31%	+16%
London	15%	51%	34%	+19%
Rest of England	15%	54%	31%	+16%

[Base 1699; 286; 1413]

The net effect is calculated by subtracting the proportion of respondents who said they have less time from those who feel they have more time.

Experience seeking trend fuelled growth and variety of leisure activities

The increase in individuals' perceived time for leisure reflects a trend that has been helping to drive engagement with leisure activities, including museums: the desire for real experiences, or experience seeking, are manifestations of the **experience economy**.[5] The hallmarks of such experiences are immersion and active participation, as opposed to absorption and passive participation.[6]

Consumers are increasingly looking for experiences that are tailored for them, and brands that empower them to be at the centre of the experience. They are also increasingly aligning themselves with brands that help them construct their own new, inventive and unique identities.[7]

Therefore, brands are increasingly creating experiential initiatives connected to their product. For example, Patagonia expanded into the realm of hosting adventure activities, beyond just selling the associated technical equipment.

5 The Experience Economy, B. Joseph Pine II and James H Gilmore
6 https://hbr.org/1998/07/welcome-to-the-experience-economy
7 http://www.genoablack.com/2018/02/08/personalisation-biggest-marketing-trend-2018/

As the experience economy matured, museums faced more fragmented competition

The cultural sector has always been well-placed to capitalise on the experience economy and has been a major beneficiary of the trend so far. The challenge now is to adapt and respond as the appetite grows for more unusual, immersive and personalised experiences, as several organisations have done.

The impact goes beyond how people choose to spend their leisure time and disposable income, but creates a wider effect on how inclusion and enjoyment is perceived and attained.[8]

Public taste is becoming more refined and selective in a variety of ways, with increasing desire for:

- Individualism
- Personalisation
- Novelty
- Snackable, 'Instagrammable' moments
- Health, wellness and betterment
- The opportunity to give back to communities

8 https://www.weforum.org/agenda/2019/01/the-experience-economy-is-booming-but-it-must-benefit-everyone/

Whilst the more evolved experience economy has the potential to pull visits to museums, it can also pull them away. The experience economy, a trend which has helped to drive museum visits, is now developing and fragmenting; thereby creating much more competition for museums, particularly in London.

While engagement with 'traditional' cultural activities remains most common, the market cited an interest in activities such as festivals (32%), indoor crazy golf (28%), arcade / board game cafes (26%), escape rooms (26%) and immersive theatre (20%). Londoners, in particular, show stronger interest in these types of activities.

'A bar in Clapham Junction called Four Thieves. They have VR and things that you can play on. Just make your experience a little bit more memorable.'

[FG, London lapsed museum attender]

'There's so much to do in London, there's more and more all the time [...] like the Victoria Market Halls and the various street food places that you can go to, and escape rooms and Crystal Maze.'
[FG, London family, museum attender]

Wellness culture increases importance of relaxing and unwinding

Alongside the experience economy, wellness culture – a focus on mental health as much as physical[9] – is also becoming more prominent, showing that experiences aren't just about thrill-seeking. This should benefit the cultural sector, as young people identify time spent in museums as a key way of unwinding.[10]

9 https://www.fluxtrends.com/state-were-in-2019/
10 https://www.theguardian.com/culture/2019/jan/20/art-fund-young-people-de-stress-with-respite-at-galleries

Search engines and social media enable access to this wider choice

Technology has, and is, enabling the growth of the experience economy. As personalisation increases, it is likely that brands that help consumers feel that they are in the driving seat will flourish, and digital technology provides increased opportunities to do this. Considering cultural and leisure activities in particular, virtual reality has been on the radar for several years and continues to increase in prominence.[11]

In terms of marketing, people report greater awareness and access to more and varied leisure options as a result of predominantly using digital tools. When asked which sources they use to find out about places to go on days out, the most common response among the London museum market was search engines (57%).[POP]

'Everything is more easily accessible now. Because you've got the internet to find everything.'
[FG, London lapsed museum attender]

11 https://blooloop.com/features/museum-vr-museum-ar/

Sources of information consulted for days out (15 most commonly selected responses) [POP]

Sources of information	One of sources	Main source
Search engines (e.g. Google)	57%	28%
Organisation-specific websites	44%	11%
Personal recommendations	43%	11%
Tourist websites	39%	7%
TripAdvisor	37%	8%
Television	33%	3%
Facebook	27%	5%
Printed newspapers / magazines	23%	3%
Voucher websites (e.g. Groupon)	22%	2%
Brochures and flyers	22%	1%
Guidebooks	18%	1%
Internet advertisements	18%	1%
Email newsletters	16%	2%
Online newspapers / magazines	16%	1%
Outdoor advertising (e.g. posters on public transport)	14%	0%
[Base]	[1723]	[1717]

Families are more likely directed by online advertisements and endorsements

Families are more likely than non-families to respond to seeing leisure activities online while generally browsing, rather than actively seeking out information, including:

- Facebook (33% v 20%)
- Instagram (17% v 10%)
- Internet advertisements (21% v 14%)

Families also commonly seek endorsements from sources such as TripAdvisor and trusted online blogs. Recommendations help people justify spend on leisure, particularly when discretionary spend is more limited. Families, in particular, seek reassurance that experiences will entertain their children for a significant amount of time to make the trip and cost worthwhile.

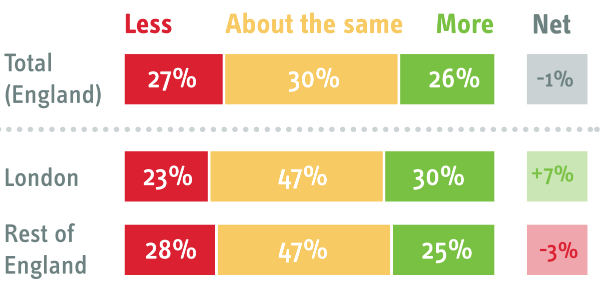
'I do look at TripAdvisor. If I'm going to pay out a certain amount of money, I want to know it's money well spent.'
[FG, London family, museum attender]

With choice comes a search for affordability

In contrast to time, those in the London museum market are less likely to say they have more money for leisure (-1% net) overall in England.

However, there is a significant gap in perceptions of personal disposable income for leisure across England. Those living in London are more likely to report an increase in their amount of money for leisure activities (+7% net) compared to those living elsewhere in England (-3% net).

Perceived amount of money for leisure, compared to three years ago
[POP]



[Base 1699; 287; 1418]

Therefore, this helps explain why those from outside London are reportedly visiting Central London for leisure less frequently in the past three years (see page 35).

Discount vouchers increasingly dictate, not just facilitate, leisure activities

Whilst the market is seeking more experiences, the economy is forcing them to adapt behaviour. Voucher websites (such as Groupon and Wowcher) are used by 86% of the London museum market when deciding how to spend free time, with 18% using them every time (see data table on page 82). [POP]

Those who take children on days out are more likely to use vouchers every time they plan activities (23%) than those who don't (11%).

'[I took my children] to the Steam Museum. That was on Groupon. They're not necessarily that much cheaper, but it's a platform to advertise. If I didn't see it on Groupon, I wouldn't see it anywhere else.'
[FG, London family museum attender]

Users reference their ability to retain the frequency of engaging with particular leisure activities, despite their level of disposable income. It also appears to be becoming an increasingly normal habit, with people wondering why you would pay full price when you know there are deals available.

'I'm the discount queen. I don't see the point of paying full price for anything when you don't have to.'
[FG, London lapsed museum attender]

'I look for all the bargains to be honest. Then I don't feel as hurt in a sense if I'd paid full price and I haven't enjoyed it.'
[FG, Liverpool museum attender]

The national museums are at a distinct disadvantage here in this context: by not charging for admission it is difficult for them to articulate promotions on discount websites. If they are not featured on these sites they are likely to be overlooked in favour of commercial, charging attractions even though they offer a better value proposition.

For example, the London Pass, designed for international and domestic tourists alike, favours paid for attractions and museums (e.g. Queen's Gallery) and therefore does not include any of the DCMS-sponsored museums.[12]

12 https://www.londonpass.com/london-attractions/

Ethical consumerism trend asks museums to reappraise

Social awareness, inclusion and ethical consumerism are all trends directly affecting perceptions of museums. Consumers are actively seeking out organisations that make the world a better place.[13] The Ethical Consumer Markets Report shows UK spend on ethical goods continues to increase (worth £83bn in 2017/18).[14] In particular, organisations that demonstrate commitment to reducing environmental impact are becoming more valued as a result of research and news on issues such as palm oil and plastic usage.

However, organisations need to be careful as consumers become more alert to insincerity. Interventions which are not directly connected to an organisation's fundamental values can result in negative perceptions. This is explored further in relation to cultural institutions later in this section.

Museums have a role to play in asking culturally-sensitive questions

Museums are seen as having the power to ask questions and lead conversations. As the colonial legacy for museums is more frequently highlighted in the press, there is an opportunity to tackle tricky subjects head on.[15] Even the most engaged museum audiences would welcome steps in the direction of reviewing the repatriation of collections.

'I love it, but at the same time, every time I go I'm looking at stuff and I'm just like (respondent draws breath in sharply), "that should not be here".'
[FG, London regular museum attender]

Questions over museum and exhibition **sponsorship** are also raised in connection with brands perceived as environmentally unethical.

Increasing focus on relevance is required

Only **17%** of the London museums market strongly agreed that 'Museums in Central London explore issues and stories that are **relevant** to me'; this is especially low for those aged 16 to 24 (12%).[POP]

Similarly only **13%** strongly agree that 'Museums in Central London **move with the times**' to keep up with social and cultural trends, as well as important issues. [POP]

And addressing inequality in representation

With increasing interest in social justice, there is growing support and appetite for museums and galleries to address inequality, such as showing more works by women and people of colour.[16]

People recognise positive moves in this direction, particularly through temporary programming; however they feel there's limited evidence of wider organisational change. There are concerns that such attempts are tokenistic gestures with little genuine substance.

'[A gallery had a] Black British section which was small, but when you go round the rest of the gallery it's just not diverse at all, so do they think they're reflecting the community?'
[FG, London regular museum attender]

'It feels like a lot of these places, especially the bigger ones, they're very happy to exploit what they consider to be a niche area of interest. But they're not willing to invest the time or money into making that into a permanent thing.'
[FG, London family, museum attender]

13 https://hbr.org/1998/07/welcome-to-the-experience-economy
14 https://www.ethicalconsumer.org/sites/default/files/inline-files/EC%20Markets%20Report%202018%20FINAL.pdf
15 https://www.thebritishacademy.ac.uk/blog/addressing-colonial-narratives-museums
16 https://www.theguardian.com/artanddesign/2019/jan/31/female-artists-are-finally-in-our-galleries-lets-keep-them-there

Museums remain high priority

Museums are still clearly a leisure time **priority** for both domestic and international markets visiting Central London. However, self-reported attendance is down, and the length of stay in London has a **correlation** with the propensity to visit museums. This again suggests that museums face **stiffer competition** for time, even among those in the market.

Museums in London are still a top priority

When asked what they would likely do on their next trip to London, the highest proportion of those in the London museums market cited museums as their first priority (20%), followed by seeing a musical (14%). Other activities would be undertaken by <4% respectively. [POP]

However, there are distinct differences by age. Those aged 16 to 24 were least likely to consider going to a museum, and were equally likely to cite museums and musicals (both 14%) as their first priority.

'Thinking about leisure activities to do on your next trip to London, which of these would be your top priority?' [POP]

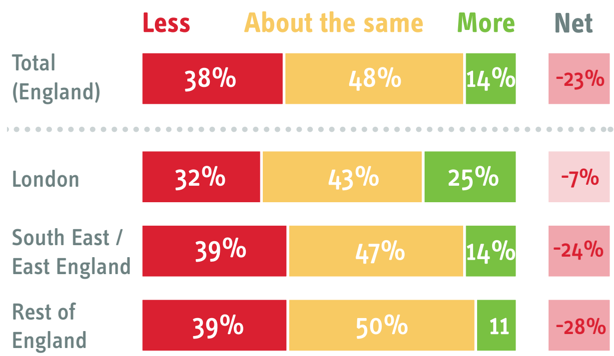
Top priority leisure activity on next trip to London (top 10 responses)	%
Museum	20%
Musical	13%
Play / drama	6%
Sporting event	5%
Film at a cinema or other venue	5%
Art gallery	4%
Historic building (non-religious)	4%
Zoo, safari park or aquarium	3%
Food / drink festivals or farmers markets	3%
Live music event	3%
[Base]	[1723]

But domestics' reported visit frequency to museums in the capital is down

Aligning to domestic tourism trends, actual visit figures and Taking Part data, those in the London museum market reported visiting London museums less often than they did three years ago (-23% net less often). [POP]

This presents a contrasting picture to the net effect of people saying they visited Central London more or less often during the same period (0% net) (see page 35).

'Over the past three years, would you say you have visited museums and galleries in Central London...' [POP]



[Base 1544; 269; 470; 805]

Half of international visits to London include a museum, gallery or exhibition

For international visitors, it is pertinent to understand what they had planned to do on their trip prior to arriving in London compared to what they actually did, to assess whether the drop in museum visits from certain markets was due to a change of heart or whether they are less likely considered even before travelling.

55% international visitors surveyed in London had planned to go to a museum, art gallery or paid exhibition before arriving in London. The same proportion ended up doing so on their trip, pointing to limited on-trip conversion. [INT QUANT] Note: respondents were asked about visiting museums, galleries and exhibitions generally, rather than specific sites.

Visiting a large museum is among the most common activities international visitors do in London

Looking at the longer list of leisure activities, the intention to visit a large museum specifically (40%) was the third most commonly cited option - after shopping (44%) and eating / drinking in restaurants, bars and pubs (44%).

'Before arriving in London, what did you want to see or do?' [INT QUANT]

Leisure activities (museums and galleries only)	Total	International markets		
		Europe	North Am.	Rest of World
Large museum	40%	38%	46%	41%
Small museum	6%	6%	5%	9%
Large art gallery	4%	3%	4%	7%
Small art gallery	2%	1%	5%	2%
Paid exhibition at a museum or gallery	3%	5%	0%	1%
Any museum / gallery	55%	52%	61%	59%
None of these	45%	48%	39%	41%
[Base]	[511]	[302]	[91]	[116]

However, this was significantly higher than parks and gardens (37%), famous sites (38%) and even attractions such as the London Eye (28%). This indicates that, like the domestic market, international visitors prioritise visiting museums while in London.

'Before arriving in London, what did you want to see or do?' and 'Which of these have you done or definitely will do on this trip?' [INT QUANT]

Leisure activities	Planned	Did
Shopping for pleasure	44%	50%
Visit a restaurant, bar or pub	44%	48%
A large museum	40%	40%
Parks and gardens	37%	39%
Famous sites or monuments	38%	38%
Historic sites, churches, houses	33%	32%
See friends or family	27%	29%
An attraction (e.g. London Eye)	28%	25%
A large art gallery	18%	23%
A guided tour by bus, boat, bike or on foot	15%	16%
[Base]		[511]

From the qualitative research, it is clear that free admission was a key benefit of visiting the national museums in London.[INT QUAL]

'First of all, it's free, which is awesome. Second thing is the quality. You don't have that in the smaller cities.' [INT QUAL, Germany]

Internationals don't always distinguish museums from other attractions

It is also worth considering the response from international visitors that they are less likely to see distinctions in types of activities in London. Museums are often perceived as peers alongside other London (and close by) attractions, including heritage, commercial attractions and film locations / studios.[INT QUAL]

'Going to big-ticket things. We've just been to the Natural History Museum. Yesterday we went to the Tower of London. We've been to Kensington Gardens. All those wonderful things London is famous for.' [INT QUAL]

'We have been tourists at our finest. We've visited some of your sights. Big Ben and the London Eye. We went on a Harry Potter walking tour this morning. We did the Portrait Gallery.' [INT QUAL]

Longer international visits more likely to include museums

Econometrics analysis shows a significant positive correlation between the number of nights international visitors spend in London and the number of DCMS museum visits. Meaning the longer someone stays, the more likely they are to visit a museum.[ECON]

'[I'm not visiting a museum on this trip because] I have no time - just here for a few days.' [INT QUAL]

This is also reflected in data collected among international visitors in London. Those who were in London for 1 to 3 nights were less likely than the average to both plan to or actually visit a museum, gallery or paid exhibition. International visits lasting 8 nights or more were significantly more likely to both plan and attend.[INT QUANT]

The number of nights spent in London decreased from 2014 and hasn't rebounded

Analysis of tourism data shows that the average number of nights international visitors spent in London peaked in 2014, 6.2 nights, which has subsequently returned to 5.8 nights and has remained static up to 2018.[17]

17 https://www.ons.gov.uk/surveys/informationforhouseholdsandindividuals/householdandindividualsurveys/internationalpassengersurvey

Visit length and museum behaviour relationship
[INT, QUANT]

Length of stay in London (nights)	Planned to visit a museum	Visited museum
Total	55%	55%
1 - 3 nights	38%	41%
4 - 7 nights	61%	62%
8 - 14 nights	69%	67%
15+ nights	82%	69%

Significant differences to the total highlighted. Green denotes higher, red denotes lower.

European bed nights in decline

However, the picture differs between markets. The number of nights **Europeans** spent in London is in decline (-5% between 2017 and 2018 alone). Rest of World visits are also down slightly in 2018 (-2%) but following a significant increase in 2017 (+16%). North American visit length is more positive, with consistent growth in the number of nights since 2012.

7. Internal museum factors

- Leading brands successfully compete for tourism spend
- Increased sophistication in visit number tracking
- Temporary exhibitions prompt ongoing awareness
- Product development reactivates lapsed visitors

Museums have driven success from within

As their proportion of **public subsidy** has changed over the past two decades, the national museums have **evolved** into highly efficient and effective audience-focused organisations, with London's museums being some of the most notable examples of this in the world. This transformation has enabled them proactively to **build their audiences** and levels of **earned income** on multiple levels.

Leading brands successfully compete for tourism spend

The national museums have become powerful, sophisticated brands that clearly speak to audiences and compete with commercial rivals for visitor spend. They are insight-guided and have invested deeply in improving the visit experience through building the quality of front-of house service, facilities and the depth of interpretation of collections and exhibitions.

Several operate highly successful membership schemes which have seen continuous growth – contributing to earned income and building loyal and frequent audiences. The quality of catering, merchandising and licencing all contribute to high brand equity and income streams.

The structure of audience-facing departments has changed to reflect this increasing market dependency, as well as commitment to wider participation, with increased strategic focus on both audience and income development.

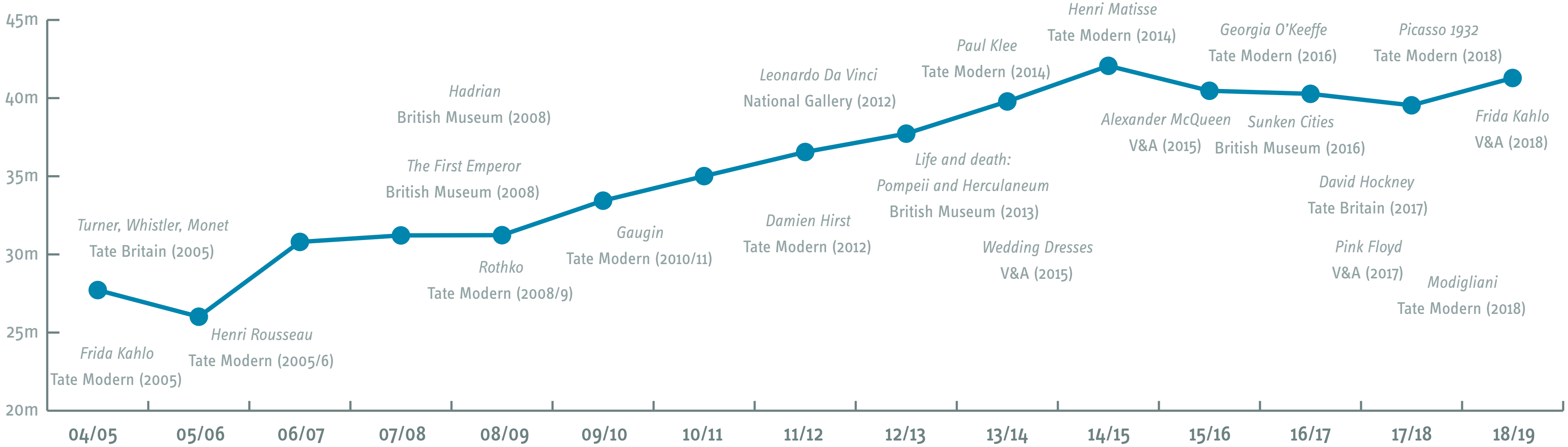
Increased sophistication in number tracking

It is also important to acknowledge the methods which museums use to track visit numbers. The majority of the national museums now use sensors, providing greater accuracy and up-to-date data on site visits.

However, the transition to these systems from manual counters occurred at different times and likely had different impacts on the accuracy of reporting and the consistency of data. It is therefore possible that visits could have been under- or over-reported.

Visits to DCMS-sponsored museums in **London** since 2004/05, with **blockbuster exhibitions** mapped

[DCMS visit numbers]



Temporary exhibitions prompt ongoing awareness

Temporary exhibitions have been the main focus for attracting new audiences, and encouraging frequency in existing audiences, with the bulk of marketing activity and resources focused on the promotion of the temporary programme. Whilst ticket sales for individual blockbuster exhibitions only rarely top 10% of total admissions at the host venue, they can have a disproportionate effect on overall visit patterns as just the advertising for a popular exhibition attracts non-paying general visits on top of ticket buyers.(LNM)

Blockbuster exhibitions drive tourism visits, attracting both domestic and international visits to London.(LNM) However, due to the limited capacity of the most successful individual exhibitions, they do not reflect a direct relationship with overall visit trends across the sector as the model shows.

The national museums have experienced deep cuts in funding over the last two decades. In some cases these have cascaded directly through to marketing departments; in others marketing budgets haven't been cut because they are directly related to the programme budget and the recognition that sales targets can only be achieved through successful marketing campaigns.[LNM]

Museums are pushing into the new experiential areas: addressing changing market needs with exhibitions and events that offer immersive, multi-sensory experiences. Programmes are featuring more innovative late-night multi-disciplinary events, hands-on workshops and festivals aimed at speaking to new audiences.

Note: Our definition of 'blockbuster' exhibitions in the London temporary exhibitions market[1] is partially dependent on attendance numbers exceeding 220k. Therefore, this visualisation includes a small selection of the DCMS-sponsored museums whose exhibitions meet this criterion. While diversity in the London exhibitions market is also an important factor, as this study is primarily focused on the overall volume of visits across the whole portfolio, it was necessarily to hone in on blockbuster exhibitions alone.

1 https://mhminsight.com/articles/london-temporary-exhibitions-report-3681

Product development reactivates lapsed visitors

Capital developments tend to represent national museums' main audience development strategies: by refurbishing public areas and opening new wings they stimulate lapsed visits, meet the needs of new audiences and help build capacity.

Curiosity-driven visits in the opening year of these new developments can generate temporary peaks in visits at that venue. This can blur underlying trends as well as present venues with the challenge of sustaining these visits and attracting new attenders into the future.

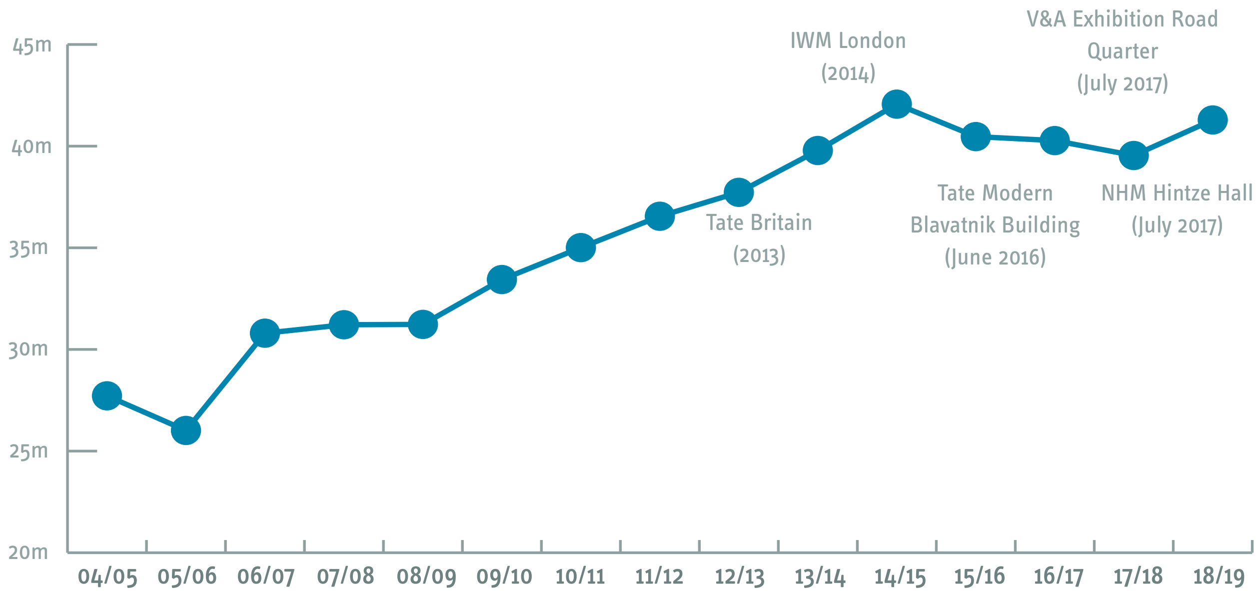
Despite their undoubted success, and particularly their contribution to the overall appeal of London as a tourist destination, the national museums are still largely the passive beneficiaries of broader positive tourism trends rather than the drivers. In this respect they also experience the downside of any negative trends.

While the national museums have become incredibly effective at programming and promoting their temporary exhibition programme, the effort they are able to invest in on-going audience development for their free offer is limited. While marketing resources are built into the budgets for each temporary exhibition, with a clear return on investment (ROI) relationship between marketing spend and ticket sales, there is no such structure for general marketing spend.

This means that the national museums target few resources at alerting or reminding audiences, particularly the domestic market, of their existence and the quality of the free offer. The danger is that, in a highly dynamic market, particularly amongst families, the national museums are unable to vie for attention against commercial competitors. However, one national museum that did divert advertising effort to promoting the free collections saw a 25% uplift in visits over the period of the campaign.

Visits to DCMS-sponsored museums in **London** since 2004/05, with **capital developments** mapped

[DCMS visit numbers]



8. Perceived barriers to visiting museums in London

- Travel and secondary spend is all part of the picture
- Exhibition cost is the most common additional barrier for museums
- Dominance of exhibition-focused marketing skews perceptions of value for money
- Less incentive to make an appointment to visit
- Busy venues are off-putting for Londoners in particular
- Unseasonal weather could be an increasingly prevalent factor
- Impact of improved regional culture
- Museums suffer the short term impact of terrorist incidents

Perceived barriers to London museums

There are factors related to Central London as a destination, which then have a **knock on impact** on museum attendance, particularly the **cost of travel** and **accommodation**.

But there are also **additional barriers** in accessing museums, once people are in London, such as the cost of **exhibition tickets**, the **busyness** of venues and the **competition** of **advertising** in an increasingly crowded leisure and attractions marketplace.

Perceptions of discretionary spend at play

Economic circumstances generally have an impact on people's propensity to engage in leisure activities, and museums are no exception. Econometrics analysis shows a positive correlation between positive consumer confidence (both UK and USA) and high levels of visits to DCMS-sponsored museums.[ECON]

The corollary of this is that financial insecurity can manifest itself in numerous ways.

Travel and secondary spend is all part of the picture

Both our quantitative and qualitative research indicates that people do not necessarily perceive museums with free admission as 'free' – secondary spend is all part of the picture.

'But they're not free [...] because you've got to get there. Café afterwards as well, donation boxes.'
[FG, London lapsed museum attender]

As with Central London generally, people are most likely to cite economic barriers to visiting London museums.

The cost of travel to Central London and subsistence are among the most frequently mentioned reasons for visiting Central London less frequently (see page 36) and also to museums specifically (see overleaf). Econometrics analysis also supports this finding. The cost of train fares shows a positive correlation with visits to DCMS museums in London; meaning periods when train fares are lower on average, the number of visits to DCMS-sponsored museums increases. [ECON]

Similarly the wraparound cost of **food and drink** at museums is also a contributing barrier specific to museums (29%).

Exhibition cost is the most common additional barrier for museums

The cost of exhibition tickets is the most common museum-specific reason for people visiting Central London museums less frequently in the past three years (after the cost of travel). This is seen across England (37%), but particularly for Londoners (44%).[POP] Compared with an equivalent study from 2017, this is the barrier that has increased in importance the most (10 percentage points).[POP 2017]

For many this has clearly deterred them from visiting museums in Central London. Whereas, for others, the perceived rising cost and increased volume of exhibitions have driven them more towards memberships as a way of retaining their visit frequency, but in a more economical way. [INT QUAL]

'We do have a membership to a lot of the galleries, because if you go to all the new exhibitions it works out cheaper that way over the year, so there's that incentive.'
[FG, London regular museum attender]

While the average price of exhibition admission has increased significantly in recent years, so have comparable leisure activities, such as cinema tickets. However, the latter reached a peak price in 2017 and has reduced to pre-2015 levels.[18]

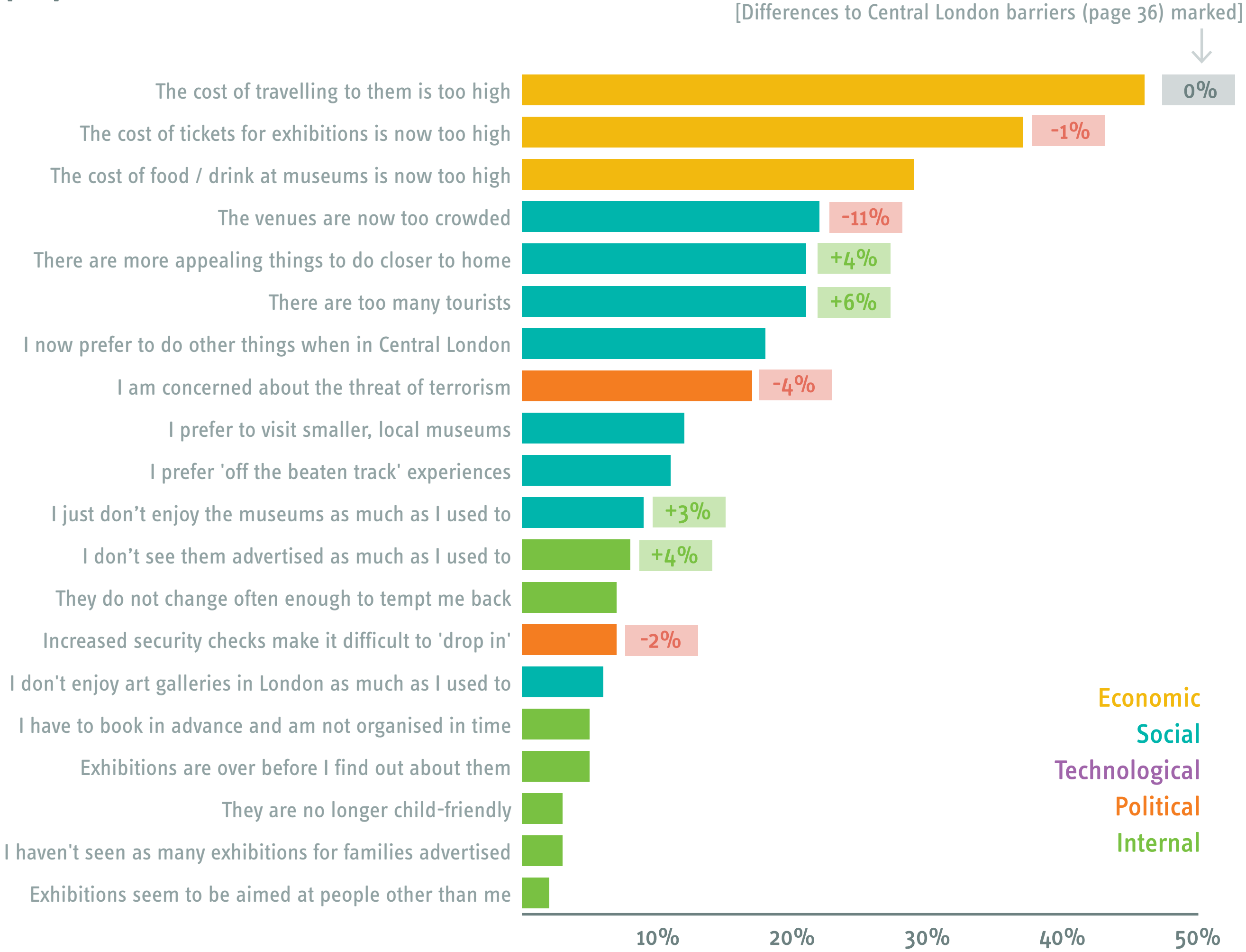
Dominance of exhibition-focused marketing skews perceptions of value for money

Qualitative responses indicated that the majority of museum marketing seen, particularly in London, was exhibition-specific.[FG]

'I do see, on the Tube, traditional museums advertised. But they're often advertising a specific installation or an experience. Maybe I'll look it up, but it's always very expensive. Even if it's at a free museum, that experience installation will be far too expensive.' [FG, London regular museum attender]

Therefore, the dominance of paid exhibition marketing, and limited promotion of the national museums' free collections could be skewing perceptions of their offer and value for money. This could drive people more towards money-saving tools (like voucher websites) as it enables them to continue to do what they love more affordably, and in some instances, more frequently.

'Which, if any, of these describe why you have generally visited Central London museums and galleries less often over the past three years than you used to?'
[POP]



[Base, visited London museums less often in the past three years than previously, 583]

18 https://www.statista.com/statistics/285783/cinema-ticket-prices-average-annual-price-in-the-united-kingdom-uk/

Less incentive to make an appointment to visit

It is ironic that, although the national museums offer free entry, their absence on such money-saving platforms could mean they are being missed by certain audience cohorts, who are more likely to seek inspiration in this way.

However, this could also be a relatively easy fix - promoting the free offer through large-scale campaigns, similar to paid exhibitions. Venues who have done this recently have seen positive results in visit numbers.

The lack of generic marketing means museums are in danger of falling off peoples' radars. Given museums' free collections are slower to change, it is common for general, non-exhibition visits to be shunned in favour of more ephemeral, temporary happenings. Encouraging people, particularly Londoners, to create an appointment to visit is key to retaining engaged, repeat audiences.

'I've been so many times, I'm less inclined to be like "oh, I need to get down to the National Portrait". Because once I go in there I'm just like "oh yes, I've seen this before".'

[FG, London lapsed museum attender]

Significant drops in awareness of London's largest museums

In relation to a comparable study in 2017, awareness of the largest Central London museums and galleries has dropped significantly. Whereas, for smaller organisations, awareness is more stable or even increased.

This could also be as a result of changes in marketing budgets at the museums.

Awareness of DCMS-sponsored museums in London (2019 vs 2017) [POP]

Awareness of DCMS-sponsored museums in London	Total (England)	Change from 2017
Natural History Museum	81%	-3%
British Museum	80%	-7%
Science Museum	79%	-3%
Tate Modern	79%	-8%
National Gallery	76%	-7%
Imperial War Museum London	73%	-4%
Royal Observatory Greenwich	67%	2%
Tate Britain	65%	0%
National Portrait Gallery	62%	-3%
National Maritime Museum	62%	5%
V&A	61%	-2%
HMS Belfast	61%	2%
Churchill War Rooms	55%	8%
[Base]	[1476]	

Busy venues are off-putting, particularly for Londoners

Perceptions that Central London museums are too crowded, particularly with tourists, is a commonly cited reason for attending less often in recent years. Londoners and those living in the South East and East of England are more likely to be deterred by perceived over-crowding at such venues, as well as tourist hotspots generally.

Those from elsewhere in the UK are less put off by crowds - to a certain degree it's **what they expect in London**.

However, there is a distinct difference between highly engaged museum attenders (culture market) and lapsed or non-attenders (mass market). As is the case with Central London generally, the **more engaged museum goers manage the busyness** of venues to access the culture they love. Whereas, less engaged audiences are more likely to be deterred for this reason, and more likely seeking out smaller venues or alternative activities altogether.

'I like going to the Natural History Museum, but I will choose my moments. When the schools aren't there.' [FG, London regular museum attender]

The **busyness of paid exhibitions** is a more significant point of contention, particularly in light of increasing admission costs. The experience visitors are seeking does not always match the reality.

'It is a once in a lifetime [exhibition] but slightly disappointing that you weren't able to spend a bit more time and read all the little cards and stuff that went with it. You were just kind of ushered.'

[FG, Liverpool museum attender]

The welcome Londoners receive at the national museums is also a factor. They often feel that the process of **bag check**, **queuing** and **donation rituals** do not provide a particularly warm welcome, and are more focused on crowd control.

'At the [museum in London] you don't really get enthusiasm from the staff so much. But when I went to the [museum in Manchester] a few years ago, we felt welcome. A really nice chat. If the person at the counter was really enthusiastic about what the museum's about, you're going to be more invested in it.'

[FG, London lapsed museum attender]

Perceptions of crowing in London museums [POP]

'Museums in Central London are too busy nowadays'	%
Strongly disagree	3%
Disagree	19%
Neither agree nor disagree	33%
Agree	30%
Strongly agree	11%
Don't know	4%
[Base]	[1671]

'The museums in Central London are only for tourists'	%
Strongly disagree	20%
Disagree	40%
Neither agree nor disagree	22%
Agree	12%
Strongly agree	6%
Don't know	1%
[Base]	[1671]

Late night events seen as opportunity for Londoners to reclaim spaces

Late night opening and special events were mentioned by Londoners as a preferable way to engage with the larger, national museums. They describe the atmosphere as more conducive to the social and often emotional or spiritual benefits they are seeking - unlike during the day when buildings are dominated by tourists.

'We've got to get x many tourist dollars through x into these region during this time,' but during the night-time how many tourist groups are you going to get through these places? It'll tend to be a more local thing.'
[FG, London regular museum attender]

'You get a different vibe as well, the kind of atmosphere is more-, a lot more relaxed. It's like getting VIP access.'
[FG, London regular museum attender]

'I personally don't drink, don't go to clubs, and so the Tate is open late. It's a social space where you don't drink alcohol - it's an obligation-free new socialisation space.'

[FG, London regular museum attender]

But the cost of extending opening hours proves a difficult balance to strike

However, this appetite for extended or different opening hours does present a challenge for museums, owing to the additional operational costs. It is therefore perhaps unsurprising that most late night openings at museums are used to host paid events or programming, to recoup some of these costs.

In addition to financial gain, museums have also benefitted from late night paid programming in terms of attracting more diverse audiences. Individual museums have reported attracting significantly different audiences to those who typically visit during normal opening times. These differences are not only related to visit motivation (as we might expect they tend to be more social visitors) but also in terms of demographics (typically younger visitors).[19]

19 https://www.artsprofessional.co.uk/news/late-openings-key-improving-gallery-audience-diversity

Perceptions convenient opening times [POP]

I think museums and galleries are open at a convenient time for me to visit	%
Strongly disagree	4%
Disagree	10%
Neither agree nor disagree	17%
Agree	44%
Strongly agree	24%
Don't know	4%
[Base]	[1723]

Those who disagreed with the statement above were asked 'If museums and galleries were open at the following times, would you be more likely to visit?

Evening, between 6pm and 9pm	%
Very likely	27%
Quite likely	40%
Neither	13%
Quite unlikely	10%
Very unlikely	9%
[Base]	[245]

Unseasonable weather could be an increasingly prevalent factor

When weather is unseasonably dry and warm, this is likely to have a negative impact on visits. Suggesting people make the most of the nice weather outdoors. But when weather is unseasonably wet, this has a small, but statistical significant positive impact on visits.[ECON]

Extreme changes in weather are currently a minor barrier, but as climate change accelerates, this may increase in relevance.

'I definitely don't tend to come into London when it's this hot, if I can avoid it. It's just horrible on the Tube. I'd rather stay somewhere closer.'

[FG, London lapsed museum attender]

Impact of improved regional culture

Having 'more things to do closer to home' was cited as a reason for not visiting museums in Central London by 21% of the market.[POP] This corresponds with the decrease in domestic tourism to London, and the increase in visits to regional museums and attractions.

This factor is of course variable depending on location; those living outside London were more likely than the average (23%) to cite this as a reason for visiting Central London museums less frequently in the past three years.

Qualitative focus group respondents in Liverpool described a booming cultural scene in the city in a way that was replicated in equivalent focus groups in Birmingham.

'I used to work in Liverpool in 2002 but then it was awarded the City of Culture in 2008, I think. I mean it is completely different to how I recognised it, it is just so, it is amazing, it moved so quickly.'

[FG, Liverpool museum attender]

These respondents described the increased quality and variety of culture on offer in the city, with major exhibitions and events. As a result of this regional development, the incentive to visit museums whilst in London is diminishing. Instead they described seeking out experiences they couldn't get in Liverpool, and experiences museums weren't considered to offer.

'In London obviously there is more going on. There is a Spanish Market, [it's] something different I like to do those sorts of things when I am in London.'

[FG, Liverpool museum attender]

This reflects the relatively high proportion of respondents to the population survey (18%) citing that they now prefer to do other things when out in Central London.[POP]

Museums suffer the short term impact of terrorist incidents

Museums are feeling the impact of a wider Central London trend when it comes to terrorism.

In the wake of terrorist incidents to venues in London, museums often saw significant drops in daily visits in the week following events, particularly those in close proximity to affected areas (e.g. Westminster Bridge). However, this is predominantly connected to people's willingness to travel into Central London (particularly domestic visitors).

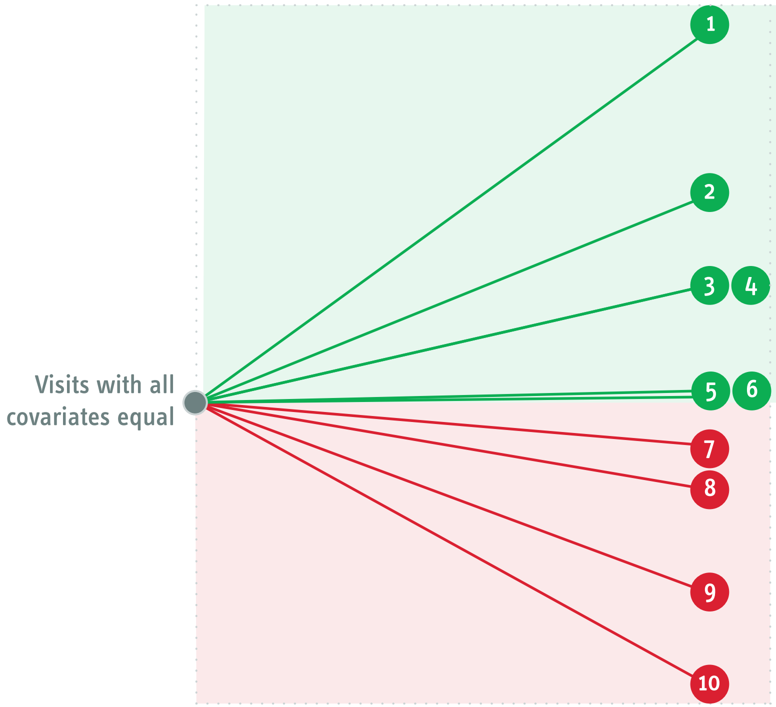
As previously explored (page 60), increased security checks and subsequent visible queues outside sites are considered a deterrent, particularly for Londoners. However, this is more connected to the perception that the venue is busy rather than directly connected to a terrorist threat.

Additional contributing factors

Through econometrics analysis we explored the relationship between sets of secondary data and daily visit counts to the DCMS-sponsored museums. For example, when levels of precipitation have been higher, visits to DCMS-sponsored museums have been higher.

Correlations which have been triangulated with other data points from primary research have been cited. There are however other correlations which emerged as significant, which weren't triangulated in our primary research, such as the impact of levels of unemployment and net migration.

Summary of factors showing significant correlation with visit figures from econometrics analysis
[ECON]



Covariates showing significant positive correlation with visits

1. Low unemployment
2. High average cost of train fares, London
3. High consumer confidence UK
4. High consumer confidence USA
5. Low net migration
6. High precipitation

Covariates showing significant negative correlation with visits

7. High max temp in hot month
8. High inflation rate
9. High average costs of train fares, UK
10. Low consumer confidence, EU

Covariates showing no significant correlation with visits

Consumer confidence, China
Petrol and diesel price
GDP
Tube station footfall

Summary and recommendations

Summary and recommendations

Museum attendance in the UK, including the DCMS-sponsored museums, reported almost continuous growth from the turn of the century up until 2014/15 when there was a deflection from what had become an accepted norm. Attendance figures for 2018/19 (and early indicators for 2019/20) demonstrate that the sector continues to be in a remarkably healthy condition, with visits exceeding historic levels.

London's cultural offering, particularly museums and galleries, remain a priority for visiting domestic and overseas tourists; exhibitions continue to break records, membership schemes grow and the perceptions of culture in the UK are among the most positive in the world.

Analysis of attendance figures at the DCMS-sponsored museums reveals that there was some volatility and significant differences between 2014/15 and 2017/18 in particular. This was most evident in London museum visits.

Even though national museums have become effective, audience-focused organisations, London museum visits tend to reflect overall tourism inflow to London. From 2000 this would have been fuelled by the growth of low-cost air travel across Europe, to a great extent powered by the internet.

The abolition of admission charges to national museums in 2001 and major social trends have also contributed to the upward trajectory of museum visits. The search for authenticity and experiences have both been powerful drivers in delivering free and paying visitors. This has helped maximise the audience of cultural visitors - the culture market - both domestic and overseas.

Since 2013, triggered by the worldwide promotional campaign for London in the form of the Olympics, this audience in London, as manifested in the museum visit profile, has been supplemented by visits drawn from a wider mass market audience. This influx of new visitors, largely from Europe, helped push visits to a peak in 2014/15.

The same trends catalysing these visits have engendered vastly increased choice and diversity of experiences in neighbourhoods across London and the regions. Therefore museums, whilst benefitting from the trends, are also now operating in a far more competitive marketplace. In addition, while the Olympics and the halo years to 2014/15 signified 'peak London', there are signs that the crowds in London had a deterrent effect on domestic visitors, making London, and the museums, possible victims of their own success.

However, the Brexit vote in 2016 seems to have been a contributory factor in bursting that bubble. European visits constitute a large proportion of the decline. Continued economic squeeze and uncertainty is also suppressing the market at home.

It could be argued by a number of national museums that there are limits to how many people they can accommodate once they have tipped 5-6m visits, and it is possible that 2014/15 brought venues close to full capacity at times. However, it is generally the case that the assumptions on which capital developments and business plans are based expect that visits will remain at these peak levels or, more likely, will continue to increase, along with earned income in the pursuit of sustainable business models.

The trends identified in this research suggest that London museum visits have experienced a peak and are now possibly showing signs of vulnerability. While some venues experienced a recovery in 2018/19, and signs continue to look positive for the current year, these indicators are not sector-wide, and other factors are bearing down in the form of environmental concerns affecting overseas trips: pandemics as well as the impact of Brexit.

The implication of this is that strategic intervention is required if the sustainability of London's national museums is dependent upon maintaining or exceeding this level of peak business. And if, as appears to be the case, certain market groups are diminishing, then others need to be cultivated more energetically to replace them.

Several of the factors influencing the recent decline in visits to DCMS-sponsored London museums are difficult for individual museums to mitigate, most notably the impact of Brexit, the resultant economic downturn, the cost of travel to London, and the cost of accommodation within London. Other factors, whilst often not within the direct control of DCMS or the museums themselves, are more readily addressed through a series of actions.

These actions have been provided to address the immediate challenges facing the sponsored museums. But whilst the active culture market is currently stable, particularly among hyper-engaged Londoners, many of the challenges identified as being most pertinent to the mass market could present the same challenge to the culture market in the coming years.

POLICY ACTIONS

1. London, as a destination, benefits from regular promotion: instil the UK mass market with a sense of urgency to visit London through periodic UK-wide and European campaigns.

All our evidence points to the influence of the London 2012 Olympics on visit trends. The Olympic year itself was relatively flat for most London museums. Visits were sustained by an active culture market. The mass market generally stayed away from London museums during the Olympic year. But the boom in visits in the subsequent two years demonstrated the impact of the Olympics in raising the appeal amongst, and influencing the perceptions and behaviour of, the mass market – especially those from near Europe and from non-London UK audiences.

The Olympics was described as 'peak London' in our research. As a huge, positive brand awareness and marketing campaign, it left a global psychological mark, and London museums benefited. But that mark has faded, and Brexit was described as 'undoing' some of the good work done by the Olympics. Promotion of England's regions, outside London, through campaigns such as those supported by the Discover England Fund, also appear to have been successful, thus drawing some visits away from London.

This absence of promotion, combined with economic challenges in particular, mean there is a lack of urgency to visit London. At the same time, a series of factors are pulling visitors to the wider regions of the UK or non-central London boroughs.

As such, periodic **UK-wide and European promotional campaigns to drive visits to Central London** are required. This activity needs to tap into the positive brand associations that were so powerful in the wake of the Olympics.

2. Recognise the importance of museums in the London's tourism offer through dedicated promotional campaigns.

It is also worth considering a campaign specifically focusing on the national museums within London and across England. Museums are among the top priorities of places tourists expect to visit and, being free, exclude no one. This needs to be preserved and celebrated.

Promotional campaigns for London specifically focusing on the unique, high quality experiences and collections the national museums offer would prove beneficial. In light of the UK's departure from the EU in January 2020, it is even more critical that cultural and tourism relationships continue to extend to this region.

With above-the-line marketing budgets at many national museums preserved for paid programmes, a city-wide promotion of free collections would be an economical alternative and help cut above the noise of other leisure activity promotions.

3. European relations are the number one threat to further visit decline: strategies need to be considered to overcome the increasingly negative perceptions of the UK among Europeans.

Whilst the decline in visits to London from the UK mass market has impacted on museum attendance, no audience has had as much of an impact as the European mass market. Visits grew sharply following the Olympics (2014/15), but have since seen a decline.

Whilst this reflects a natural wave, with the Olympics boosting awareness and desire to visit that has since waned, another factor behind this decline appears to be concerns around Brexit.

Perceptions of UK culture remain extremely strong, but wider negative perceptions of the UK are beginning to impinge on Europeans' willingness to visit. Whilst the weak pound is likely to continue driving visits from other markets such as the US and China, this is unlikely to offset a further decline from Europeans. At the same time the European market is so much greater than either that of USA or China, at least for the foreseeable future, that proactive strategies are needed to replace or counter this decline in European visits if museum visit levels are to be sustained or increased.

Strategies need to be considered to overcome the negative perceptions of the UK among Europeans. Promoting the fact that the cultural offer in London remains as inspiring, world class, welcoming, diverse and free as ever.

4. Consider strategies that increase awareness of the UK public, and overseas tourists, that national museums are free and extraordinary. This awareness shouldn't be assumed.

The market is permanently dynamic, particularly the family market: new people are arriving in London and new families are emerging all the time. The market needs to be reminded on a regular basis of the existence of the national museums and the fact that they are such a benefits-laden free resource. This is particularly important within the context of economic factors being the most commonly cited barriers to attendance.

Awareness of institutions does not correlate with how long they have been in existence for; particularly in the current trend of pop-ups, festivals and dynamic programming.

5. Invest in further research related to travel difficulties and perceptions of travel in London.

The qualitative research in this study suggested that, whilst the cost of travel to London is the number one barrier, the hassle of London travel could be more of a hidden barrier.

Focus groups suggested there remains a fear and confusion around travelling across London, which those within the capital struggle to comprehend. It could be that clearer messaging around journey planning, Oyster cards and contactless payment is required. However, this find was untested quantitatively and it is recommended that further research and consultation with TFL is undertaken to ascertain the significance of this data point.

The actions below should be considered in light of changes of funding at DCMS-sponsored museums. Several of the strategies below require deeper investment from museums which is likely to be beyond what can be reasonably expected within funding limits.

MUSEUM ACTIONS

1. Strategies are required to keep pace with social trends.

The market is dynamic, and is constantly adjusting to the trends of its time. We are at a moment of significant change across myriad PESTEL factors. Criticism from those outside of the active culture market was aimed at museums for being slow to react to these trends. In particular, museums need to respond to social inclusion issues.

Whilst there has been progress made in major exhibitions, the market sees this as tokenistic and short term. Museums aren't seen as addressing the systemic challenges facing all commercial and public sectors in terms of ethnic, sexual and socio-economic diversity.

Museums also need to adjust to changing technological and social trends encapsulated by the booming **Experience Economy**.

Evening events are providing Londoners with the opportunity to 'reclaim' museums – a nocturnal play date for the culturally engaged. But these remain minority activities, for those in the know. Repackaging experiences more generally in ways that fit around hectic lives, and that compete with emerging pop-up experiences, that are advertised in the right digital spaces, will help museums to overcome the perception that they are just 'always there'.

More widely promoted early morning and late evening opening hours will remind the wavering public that these are places for them rather than just for tourists and school parties. However, the financial and operational implications of extending opening hours to provide such experiences needs to be carefully considered by individual museums.

2. Consider the benefits of working in partnership to create a group-wide destination campaign

Whilst persuading the wider UK mass market to return to, or to visit central London is the primary challenge for the sector, the heightened competition for leisure time among those who do visit London is also a major challenge.

The focus of most museum marketing resources is on the marketing of temporary, paid for exhibitions. This is currently successfully sustaining visits from the active culture market, but it isn't activating sustained attendance from the mass market for the free offer. Exhibition advertising serves to remind the mass market of ticket prices, of specialist appeal and consequently sustains perceptions of museums in London representing an expensive day out.

A refocus on the generic, awe-inspiring and socially enriching offer through destination marketing could be considered as a route to shifting the staid perceptions held of museums. The mass market need to know more about the benefits of visiting the free collections - the treasures held within collections and the types of experiences on offer.

Consider a group-wide campaign that highlights the attractions of the DCMS-sponsored museums. This would be a consolidated, democratic approach to market reactivation.

3. Consider solutions that package ticket and travel.

The two primary barriers to visiting London are the cost of travel and accommodation. The next most common barrier to visiting museums in London is the cost of exhibition tickets. Products that package travel with exhibition tickets should be considered. This may require museums working in partnership with each other, and with travel companies. Promoting these packages on online deal-hunting sites will place Museums onto the same platform as commercial attractions, which are successfully tapping into the saving mentality of both the culture and the mass market.

These strategies shouldn't be restricted to exhibition tickets; they should extend to secondary spend deals. Moreover, packaging free collection visits into these strategies is an important consideration.

4. Consider the long-term impact of exhibition pricing strategies.

In the necessary search for long-term sustainability, particularly in light of funding cuts, a common strategy for museums has been to increase the price of exhibition tickets, or to look to more dynamic pricing strategies (e.g. charging more at peak visit times).

However, but for the exception of genuine once-in-a-lifetime blockbuster exhibitions, the cost of tickets to exhibitions is becoming a major barrier to mass market reactivation. Ticket price is widening the gap between the culture market and the mass market. The culture market is savvy, and is actively finding ways around the cost of tickets through strategic membership purchases. But, since the psychological barrier of £20 has been breached, the mass market is being priced out, encouraging them to consume other cultural experiences whilst in London, or to consume an improved cultural offering closer to home.

Price point testing to identify the optimum (rather than highest) price at which attendance and income can be maximised and inventive pricing structure, such as local and youth membership schemes, are important for exhibitions to remain accessible to mass market audiences.

6. Consider food and drink pricing strategies.

Audiences in our study described how visiting a free museum doesn't mean a free day out. They calculate the cost of travel and food and drink into the mix. This is especially true of families travelling from outside of London. The cost of food and drink at museums, as well as a lack of family-friendly choice, is a barrier, perceptual and real, to attendance for those in lower socio-economic groups. Accessible facilities, kids menus and picnic areas need to be prominent on museum websites.

Appendix

Appendix one: Hypotheses

Hypotheses tested - impact on the pattern of decreasing visits to DCMS London Museums, 2014/15 - 2017/18 [Table 1 of 5]

	No.	Short hand	Hypotheses
Economical	1	**Favourable EX rate**	When exchange rates are favourable to them, international visitors are more likely to visit the UK
Economical	2	**Weak £ drives staycations**	Poor value of the £ means people are more likely to spend leisure time in the UK
Economical	3	**Strong £ drives holidays**	Strong value of the £ means people are more likely to spend leisure time overseas
Economical	4	**Seek free activities**	When feeling tight on budget, people are more likely to go to an attraction with free entry
Economical	5	**Staying closer to home**	When feeling tight on budget, people are more likely to do leisure activities close to home
Economical	6	**Weak £ blocks overnight Ldn**	When feeling tight on budget, people are less likely to go on day or overnight trips to London
Economical	7	**Income spread thin**	Disposable income is spread across more activities than it used to be
Economical	8	**Personal circumstances**	Financial insecurity inhibits discretionary spend
Economical	9	**Cost of travel in Ldn**	Cost of travel within London has increased in the past ten years
Economical	10	**Cost of travel to Ldn**	Cost of travel to London has increased in the past ten years
Economical	11	**Cost of food & drink Ldn**	Cost of subsistence in London has increased in the past ten years
Economical	12	**Cost of leisure in Ldn**	Cost of leisure activities in London is high
Economical	13	**Cost of tickets in Ldn**	Cost of exhibition tickets in London is high
Economical	14	**Cost of accomo in Ldn**	Cost of accommodation in London has increased in the past ten years
Economical	15	**Tourist visit purpose change**	Changes in international visitors' visit purpose (i.e. VFR, leisure or business)

Hypotheses tested - impact on the pattern of decreasing visits to DCMS London Museums, 2014/15 - 2017/18 [Table 2 of 5]

	No.	Short hand	Hypotheses
Social	16	**Ldn not as desirable**	London is not as desirable a place to visit as it was previously
	17	**Olympics Halo**	The halo effect of the London 2012 Olympics is waning
	18	**Ldn is crowded**	London is perceived to be over-crowded
	19	**Ldn is 'touristy'**	London is perceived to be too 'touristy'
	20	**More to do closer to home**	People are increasingly looking for leisure options outside London and/or closer to home
	21	**More mainstream tourists**	Tourists visiting the UK for reasons other than arts/culture/heritage (e.g. shopping)
	22	**Museums low priority**	Museums are less of a priority when planning a trip to London
	23	**Other events more appealing**	Other events and activities in London are more appealing than DCMS museums
	24	**Off beaten track 'discoveries'**	Visitors seeking more personalised and more 'off the beaten track' discoveries
	25	**Wellbeing activities**	Preference for leisure activities that offer a more evident wellbeing or physical benefit
	26	**Language barrier**	There is a language barrier to visiting museums for non-English speaking tourists
Environm.	27	**Extreme wet or cold**	When weather is unseasonably cold/wet, people are more likely to pursue indoor leisure activities
	28	**Unseasonably good weather**	When it's warm and dry, but not too hot, people are likely to go to an outdoor venue
	29	**Extreme heat**	But when it's unseasonably hot, visiting indoor venues becomes more attractive

Hypotheses tested - impact on the pattern of decreasing visits to DCMS London Museums, 2014/15 - 2017/18 [Table 3 of 5]

	No.	Short hand	Hypotheses
Political	30	**Brexit negative perceptions**	Brexit has increased negative impressions of UK, thus deterring visits
	31	**Protests - Ldn visits**	People less likely to visit London for leisure when political/environmental protests are planned
	32	**Protests - museum visits**	People less likely to visit central London when significant political/environmental protests are planned
	33	**Terrorism - Ldn visits**	The threat of terrorism deters tourists from visiting London
	34	**Terrorism threat level**	When the government terrorism threat level heightens, visits to the main cultural sites decrease
	35	**Terrorism short term**	Visits to cultural/tourist sites see a short term dip following terror incidents
	36	**Visa regulations**	Changes to the UK Standard Visitor visa has opened up new markets, making it easier to visit the UK
	37	**STEM school trips**	Greater focus on STEM subjects means that children are less likely to visit museums on school trips
	38	**STEM family focus**	Greater focus on STEM subjects means that children are less likely to visit museums with families
Technological	39	**Rail disruption**	Rail disruptions mean people are less likely to travel into London for leisure
	40	**Digital broadens horizons**	Online tools/behaviour enables greater exploration and broadening horizons
	41	**Review sites influence**	Review sites based on quality, rather than quantity of reviews, favour smaller museums
	42	**Airbnb tourists out of CL**	Airbnb means more tourists are staying outside Central London
	43	**Airbnb changing behaviour**	Innovations like Airbnb encourage people to 'live like a local' rather than a tourist
	44	**Airbnb makes trips cheaper**	Innovations like Airbnb and Uber make leisure trips cheaper than they used to be
	45	**Voucher sites**	The internet enables people to shop around more for the best deals
	46	**Online museum visits**	Access to online collections means people don't feel the need to visit museums as much

Hypotheses tested - impact on the pattern of decreasing visits to DCMS London Museums, 2014/15 - 2017/18 [Table 4 of 5]

	No.	Short hand	Hypotheses
Programming	47	**City break culture fix**	People are more likely to visit museums on a city break abroad than in spare time in home country
	48	**Inconvenient opening times**	Museums are not open at convenient times
	49	**Too many paid exhibitions**	Increasing number of paid exhibitions competing for time/money
	50	**More regional museums**	There are plenty of local/regional museums, so visiting national ones/in London isn't necessary
	51	**Regional museums up game**	Local museums are better quality/experience than they used to be
	52	**Touring exhibitions**	Touring exhibitions/programmes to the regions enable me to see high quality art/culture
	53	**Irrelevant programming**	Museums programme/narratives seen as outdated and less relevant
	54	**Sponsorship perceptions**	Negative perceptions around museum sponsorship/issues
	55	**Museums not family fun**	Perceptions that museums are not fun for all the family
	56	**Staid programming**	Perceptions don't change enough for visitors to want to visit more regularly
	57	**'Bucket list' experiences done**	Tourists ticking off 'bucket list' experiences have little compelling reason to return on future trips

Hypotheses tested - impact on the pattern of decreasing visits to DCMS London Museums, 2014/15 - 2017/18 [Table 5 of 5]

	No.	Short hand	Hypotheses
Marketing	58	**Lack of generic marketing**	Lower generic marketing spend and greater focus on exhibition marketing
Marketing	59	**Low rank on Trip Advisor**	Venues not able to control their presence on review-generated sites (e.g. TripAdvisor)
Marketing	60	**Families rely on review sites**	Families are more likely to rely on review-based websites
Marketing	61	**Low marketing presence**	Generally don't see museum advertising as much as they used to
Marketing	62	**Price-led paid attractions**	Visitors are not finding museums' free offer among price-led marketing of paid attractions
Marketing	63	**What's free, what isn't?**	Lack of clarity on which aspects of museums are free and which charge admission
Marketing	64	**Not marketed as cheap deals**	Museums are not marketed in the same way as 'cheap deals' for attractions
Marketing	65	**Aggressive donation policy**	More proactive/aggressive donations policies
Experience	66	**Museums too traditional**	The 'traditional' museum/gallery experience is less appealing than the experience economy
Experience	67	**Sharability of experiences**	The shareability of experiences can affect attendance
Experience	68	**Children not interested**	Perception that children aren't interested in museums
Capacity	69	**Museums too crowded**	Venues perceived as being too crowded
Capacity	70	**Security queues**	Long visible security queues deter people – particularly would-be incidental visitors
Capacity	71	**Londoners deterred by crowds**	Londoners particularly put off by busyness
Capacity	72	**Blockbuster ticket sell out**	People assume they won't be able to get a ticket for a blockbuster exhibition

Appendix two: list of DCMS-sponsored museums

DCMS-sponsored museums

Included museums are those currently sponsored by DCMS and for whom visit numbers are consistently recorded between 1998/99 and 2018/19. Exceptions in the availability of data are notated. Visit numbers for individual venues are listed on the following pages.

Visit data for museums who were previously sponsored by DCMS, but are not currently, have been excluded from the analysis.

Source: **https://www.gov.uk/government/statistical-data-sets/museums-and-galleries-monthly-visits**

MHM's Benchmarking Group

Museums annotated with an asterix (*) are participants of exit survey research with Morris Hargreaves McIntyre between 2011/12 and 2018/19.

London

- British Museum*
- Horniman Museum
- IWM Churchill War Rooms
- IWM HMS Belfast
- IWM London*
- National Gallery*
- National Portrait Gallery*
- Natural History Museum South Kensington*
- Royal Armouries White Tower (since 2011/12)
- Royal Museums Greenwich (since 2004/05)
- Sir John Soane's Museum (since 2008/09)
- Science Museum South Kensington*
- Tate Britain*
- Tate Modern*
- V&A Museum Of Childhood
- V&A South Kensington*
- Wallace Collection

Regional (Outside London)

- IWM Duxford
- IWM North*
- National Coal Mining Museum (since 2004/05)
- National Museums Liverpool
- Natural History Museum Tring (since 2004/05)
- Royal Armouries Fort Nelson
- Royal Armouries Leeds
- SMG Locomotion (Since 2002/03)
- SMG Science and Industry Museum (missing 2004/05 to 2010/11)
- SMG National Media Museum (since 1999/2000)
- SMG National Railway Museum (since 1999/2000)
- Tate Liverpool*
- Tate St Ives

Appendix three: annual visits to DCMS-sponsored museums

Annual visits to museums currently sponsored by DCMS

DCMS-sponsored museums	1998/1999	1999/2000	2000/2001	2001/2002	2002/2003	2003/2004	2004/2005	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
British Museum	4.49m	4.37m	4.59m	4.81m	4.62m	4.62m	4.78m	4.49m	4.9m	6.04m	5.47m	5.65m	5.87m	5.84m	5.59m	6.76m	6.68m	6.85m	6.23m	5.82m	6.03m
Horiman Museum	211k	186k	116k	131k	250k	272k	303k	283k	430k	478k	483k	621k	585k	509k	616k	698k	750k	794k	785k	813k	808k
IWM Churchill War Rooms	1.37m	1.37m	1.61m	1.61m	1.98m	1.97m	322k	304k	299k	307k	282k	315k	336k	361k	366k	470k	481k	495k	506k	551k	582k
IWM Duxford							444k	456k	418k	451k	376k	383k	403k	382k	383k	372k	406k	382k	366k	390k	398k
IWM HMS Belfast							279k	229k	273k	259k	239k	255k	241k	199k	223k	326k	343k	301k	282k	282k	307k
IWM London							765k	691k	732k	760k	866k	887k	1.1m	972k	704k	670k	1.19m	1.05m	1.01m	998k	1.06m
IWM North							247k	226k	234k	223k	245k	239k	242k	335k	314k	339k	394k	306k	251k	244k	339k
National Coal Mining Museum	-	-	-	-	-	-	117k	120k	129k	136k	116k	118k	108k	101k	120k	125k	120k	138k	122k	135k	110k
National Gallery	4.8m	5m	4.78m	4.86m	4.1m	4.65m	4.91m	3.95m	4.74m	3.91m	4.44m	4.7m	5.09m	5.36m	5.38m	5.9m	6.53m	5.9m	6.18m	5.05m	5.92m
National Museums Liverpool	700k	791k	710k	823k	1.24m	1.53m	1.54m	1.61m	1.69m	2.17m	2.69m	2.27m	2.63m	3.18m	3.28m	2.71m	2.65m	2.85m	3.03m	3.31m	3.97m

Annual visits to museums currently sponsored by DCMS

DCMS-sponsored museums	1998/1999	1999/2000	2000/2001	2001/2002	2002/2003	2003/2004	2004/2005	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
National Portrait Gallery	994k	997k	1.22m	1.48m	1.32m	1.43m	1.47m	1.53m	1.67m	1.65m	1.83m	1.98m	1.76m	2.05m	2.05m	1.99m	2.08m	2.1m	1.88m	1.69m	1.55m
NHM South Kensington	1.79m	1.76m	1.69m	2.2m	2.89m	3.14m	3.22m	3.2m	3.64m	3.62m	3.7m	4.26m	4.68m	4.82m	5.13m	5.42m	5.28m	5.2m	4.47m	4.56m	5.35m
NHM Tring	-	-	-	-	-	-	104k	108k	117k	127k	112k	118k	127k	123k	156k	154k	155k	152k	138k	151k	143k
Royal Armouries Fort Nelson	335k	218k	235k	338k	398k	380k	82k	84k	76k	84k	73k	74k	69k	72k	71k	86k	97k	103k	106k	104k	241k
Royal Armouries Leeds							302k	244k	225k	268k	265k	270k	272k	215k	227k	221k	233k	224k	221k	219k	193k
Royal Armouries White Tower	-	-	-	-	-	-	-	-	-	-	-	-	-	1.57m	1.51m	1.63m	1.7m	1.62m	1.54m	1.79m	1.86m
Royal Museums Greenwich	-	-	-	-	-	-	1.52m	1.49m	1.62m	1.77m	.07m	2.38m	2.43m	1.86m	1.93m	2.48m	2.33m	2.4m	2.44m	2.56m	2.65m
Sir John Soane's Museum	85k	97k	84k	87k	87k	94k	-	-	-	-	96k	107k	110k	108k	106k	119k	117k	119k	122k	131k	132k
SMG Locomotion, Shildon	-	-	-	-	113k	141k	113k	142k	139k	149k	139k	159k	199k	210k	203k	296k	167k	213k	232k	199k	153k
SMG Science and Industry Museum	323k	301k	288k	390k	434k	382k	-	-	-	-	-	-	-	839k	642k	669k	680k	707k	645k	684k	652k

Annual visits to museums currently sponsored by DCMS

<table>
<tr><th>DCMS-sponsored museums</th><th>1998/1999</th><th>1999/2000</th><th>2000/2001</th><th>2001/2002</th><th>2002/2003</th><th>2003/2004</th><th>2004/2005</th><th>2005/2006</th><th>2006/2007</th><th>2007/2008</th><th>2008/2009</th><th>2009/2010</th><th>2010/2011</th><th>2011/2012</th><th>2012/2013</th><th>2013/2014</th><th>2014/2015</th><th>2015/2016</th><th>2016/2017</th><th>2017/2018</th><th>2018/2019</th></tr>
<tr><td>SMG National Media Museum</td><td>-</td><td>963k</td><td>970k</td><td>823k</td><td>768k</td><td>723k</td><td>659k</td><td>615k</td><td>677k</td><td>738k</td><td>701k</td><td>610k</td><td>496k</td><td>483k</td><td>493k</td><td>480k</td><td>414k</td><td>460k</td><td>405k</td><td>505k</td><td>455k</td></tr>
<tr><td>SMG National Railway Museum</td><td>-</td><td>468k</td><td>486k</td><td>588k</td><td>767k</td><td>740k</td><td>885k</td><td>744k</td><td>901k</td><td>824k</td><td>773k</td><td>749k</td><td>630k</td><td>717k</td><td>727k</td><td>926k</td><td>727k</td><td>750k</td><td>704k</td><td>760k</td><td>782k</td></tr>
<tr><td>SMG South Kensington</td><td>1.56m</td><td>1.4m</td><td>1.37m</td><td>1.65m</td><td>2.73m</td><td>2.8m</td><td>2.15m</td><td>2.02m</td><td>2.6m</td><td>2.71m</td><td>2.67m</td><td>2.78m</td><td>2.77m</td><td>2.92m</td><td>3.08m</td><td>3.34m</td><td>3.35m</td><td>3.42m</td><td>3.22m</td><td>3.18m</td><td>3.17m</td></tr>
<tr><td>Tate Britain</td><td rowspan="4">3.03m</td><td rowspan="4">2.48m</td><td rowspan="4">6.73m</td><td rowspan="4">5.53m</td><td rowspan="4">6.33m</td><td rowspan="4">6.21m</td><td>1.32m</td><td>1.62m</td><td>1.67m</td><td>1.53m</td><td>1.59m</td><td>1.59m</td><td>1.61m</td><td>1.49m</td><td>1.4m</td><td>1.42m</td><td>1.37m</td><td>1.27m</td><td>1.36m</td><td>1.55m</td><td>1.36m</td></tr>
<tr><td>Tate Liverpool</td><td>591k</td><td>607k</td><td>566k</td><td>691k</td><td>1.04k</td><td>523k</td><td>606k</td><td>607k</td><td>621k</td><td>571k</td><td>598k</td><td>618k</td><td>636k</td><td>643k</td><td>702k</td></tr>
<tr><td>Tate Modern</td><td>4.15m</td><td>3.96m</td><td>5.23m</td><td>5.24m</td><td>4.65m</td><td>4.79m</td><td>5.04m</td><td>4.77m</td><td>5.52m</td><td>4.81m</td><td>5.7m</td><td>4.59m</td><td>6.4m</td><td>5.71m</td><td>5.8m</td></tr>
<tr><td>Tate St Ives</td><td>237k</td><td>224k</td><td>241k</td><td>244k</td><td>204k</td><td>219k</td><td>199k</td><td>206k</td><td>205k</td><td>241k</td><td>230k</td><td>184k</td><td>52k</td><td>265k</td><td>300k</td></tr>
<tr><td>V&A Museum of Childhood</td><td rowspan="2">1.44m</td><td rowspan="2">1.22m</td><td rowspan="2">1.34m</td><td rowspan="2">1.86m</td><td rowspan="2">2.53m</td><td rowspan="2">2.69m</td><td>235k</td><td>123k</td><td>154k</td><td>333k</td><td>359k</td><td>392k</td><td>423k</td><td>443k</td><td>433k</td><td>446k</td><td>466k</td><td>463k</td><td>433k</td><td>397k</td><td>417k</td></tr>
<tr><td>V&A South Kensington</td><td>2.01m</td><td>1.9m</td><td>2.57m</td><td>2.28m</td><td>2.13m</td><td>2.35m</td><td>2.62m</td><td>2.89m</td><td>3.3m</td><td>3.2m</td><td>3.26m</td><td>3.46m</td><td>3m</td><td>3.99m</td><td>3.87m</td></tr>
<tr><td>Wallace Collection</td><td>189k</td><td>172k</td><td>256k</td><td>229k</td><td>234k</td><td>236k</td><td>288k</td><td>219k</td><td>278k</td><td>335k</td><td>359k</td><td>383k</td><td>358k</td><td>399k</td><td>378k</td><td>415k</td><td>428k</td><td>427k</td><td>419k</td><td>463k</td><td>422k</td></tr>
</table>

Appendix four: Additional data tables

Audiences gained, sustained and lost: European visits by visit history and main visit motivations
[LNM]

	Market	'Growth' period 2012/13 to 2014/15	'Loss' period 2015/16 to 2017/18	Difference	
Visit history	First time (never visited museum before)	21.89m	21.49m	-403k	-2%
	Current (visited 2+ times in 12m)	1.99m	1.92m	-80k	-4%
	Lapsed (last visited a museum >12m ago	6.43m	6.89m	+454k	+7%
Visit motivation	Social	14.58m	12.15m	-2.43m	-17%
	Intellectual	9.15m	8.75m	-394k	-4%
	Emotional	4.16m	3.54m	-620k	-15%
	Spiritual	1.32m	1.50m	+182k	+14%

Proportions of visits to those in the London National Museums group from key audience groups: **group type**
[LNM]

Families (group)	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Families	26%	26%	28%	31%	31%	27%	30%	31%
Non-families	74%	74%	72%	69%	69%	73%	70%	69%

Proportions of visits to those in the London National Museums group from key audience groups: **age (group)**
[LNM]

Age (group)	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Under 16	11%	11%	12%	13%	13%	12%	13%	14%
16 to 24	20%	20%	17%	17%	17%	19%	17%	17%
25 to 34	23%	24%	22%	22%	22%	22%	22%	19%
35 to 44	16%	17%	17%	17%	16%	16%	15%	17%
45 to 54	14%	14%	14%	13%	14%	13%	13%	13%
55+	16%	15%	18%	18%	17%	17%	19%	19%

Proportions of visits to those in the London National Museums group from key audience groups: **BAME**
[LNM]

Ethnicity	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
BAME (UK overall)	16%	19%	14%	14%	16%	17%	18%	19%
BAME (London)	22%	26%	20%	20%	21%	22%	22%	24%

'How often do you search for vouchers or discounts before deciding what to do with your free time?' [POP]

Frequency of using vouchers or discounts	Total	Family market	
		Ever take children on days out	Never take children on days out
Every time	18%	24%	12%
More than half the time	23%	24%	21%
About half the time	25%	25%	24%
Less than half the time	20%	17%	25%
Never	14%	10%	19%
[Base]	[511]	[169]	[342]

Significant differences between the 'first-time' and 'repeat' subgroups to the average are highighted. Green denotes significantly higher, and red lower.

‘Before arriving in London, what did you want to see or do?’ [INT QUANT]

Leisure activities	Total	Visit history to London	
		First-time	Repeat
Eat and drink in a restaurant, bar or pub	44%	46%	43%
Go shopping for pleasure	44%	39%	46%
Visit a large museum	40%	47%	36%
See famous sites, monuments or buildings	38%	37%	38%
Visit parks and gardens	37%	33%	39%
Visit historic sites, churches or houses	33%	32%	33%
Visit an attraction (e.g. London Eye)	28%	29%	28%
See friends or family	27%	18%	31%
Visit a large art gallery	18%	20%	16%
See a West End theatre performance	17%	16%	17%
Go on a guided tour by bus, boat, bike or foot	15%	20%	13%
Go for a traditional afternoon tea	15%	16%	15%
Visit a small museum	14%	21%	11%
Visit a zoo or aquarium	9%	14%	6%
Attend a paid exhibition at a museum or gallery	9%	6%	10%
[Base]	[511]	[169]	[342]

Significant differences between the ‘first-time’ and ‘repeat’ subgroups to the average are highlighted. Green denotes significantly higher, and red lower.

‘Reasons for visiting museums in Central London less often over the past three years than used to’ [POP]

Reasons for visiting Central London museums less frequently (top 10 reasons)	Total	Origin	
		London	Rest of England
The cost of travelling to them is too high	46%	25%	49%
The cost of tickets for exhibitions is now too high	37%	44%	36%
The cost of food and drink at museums and galleries in London is now too high	29%	24%	30%
The venues are now too crowded	22%	28%	21%
There are now more appealing things to do closer to home	21%	13%	23%
There are too many tourists	21%	24%	20%
I now prefer to do other things when out in Central London	18%	17%	18%
I am concerned about the threat of terrorism	17%	15%	18%
I prefer to visit smaller, local museums and galleries	12%	9%	13%
I prefer 'off the beaten track' experiences	11%	20%	9%
[Base]	[583]	[87]	[496]

Significant differences between the ‘London’ and ‘Rest of England’ subgroups to the average are highlighted. Green denotes significantly higher, and red lower.

Which of the following describes you?
[POP]

Olympic engagement	%
I watched the London 2012 Olympics / Paralympics on TV	63%
I attended the London 2012 Olympics / Paralympics as a spectator or volunteer	15%
I visited London during the Olympics / Paralympics, but didn't attend any events	8%
Seeing the London 2012 Olympics / Paralympics made me want to visit London, and I did so after they finished	6%
None of these	26%
[Base]	[1723]

Note: This was a multi-choice question, therefore proportions do not add up to 100%

Appendix five: visit motivations definitions

What motivates a visit?

People visit museums and galleries to meet deep-seated needs, ranging from spending time with friends and family to gaining inspiration, from feeding a hobby interest to experiencing awe and wonder – and many others. These motives are what make people set off for a visit. As they enter the building, they become expectations and as they leave they become outcomes.

Over several years, MHM repeatedly asked people to tell us why, in their own words, they chose to visit museums and galleries. From this, we identified four broad drivers for visiting: social, intellectual, emotional and spiritual.

As shown to the right, a visitor's primary driver determines how they see the venue and informs their entire visit. Meeting these needs is the visitor's primary motivation for visiting, and is also their minimum expectation of a visit.

Hierarchy of Visitor Motivations

Visitors...

see museum as a:	have this driver:	seek this from a visit:
CHURCH	SPIRITUAL	Creative stimulation and quiet contemplation, they see the museum as an opportunity to escape and recharge their batteries, food for the soul
SPA	EMOTIONAL	May have a personal connection to the subject matter, want to see fascinating things in an inspiring setting, seek ambience, deep sensory and intellectual experiences
ARCHIVE	INTELLECTUAL	Keen to encourage their children's or their own interest and knowledge, may have professional interest in the subject, seek a journey of discovery, to find out new things
ATTRACTION	SOCIAL	See museum as an enjoyable place to spend time with friends and family, seek ease of access and orientation, good facilities and services, welcoming staff

Research parameters

This report was prepared for the Department for Digital, Culture, Media and Sport, by Morris Hargreaves McIntyre, March 2020

It was commissioned April 2019

England-wide population survey

Target group Adult population in England, in the market for days out in London and museums or art galleries.

Data collection method Online survey, 15 minutes

Sample size 1,723

Date of fieldwork July 2019

Weighting procedures This was weighted to be representative of the English population (Wales, Scotland and N Ireland not sampled) in terms of population in Government Office Region, gender, age and qualifications.

Reliability of findings At a 95% confidence level, the maximum confidence interval or margin of error is 2.36%. So at 50% the actual figure could range between 47.64% and 52.36%.

Domestic audience focus groups

Target groups (1) London regular museum and paid exhibition attenders; (2) London family museum attenders; (3) London lapsed museum attenders; (4) Liverpool museum attenders; (5) Birmingham museum attenders

Data collection method 90-minute discussion groups

Sample size 30

Date of fieldwork July 2019

On-street survey of international tourists

Target group International tourists in London. Data collected at Trafalgar Square, South Kensington, Leicester Square, Greenwich, Covent Garden, Westminster and Southbank.

Data collection method On-street iPad survey, 5 minutes

Sample size 511

Date of fieldwork June - July 2019

Weighting procedures This was weighted from the International Passenger survey to be representative of visitor origin, the length of stay, the purpose of their visit (Holiday+VRF vs Other) and family vs non-family

Reliability of findings At a 95% confidence level, the maximum confidence interval or margin of error is 4.34%. So at 50% the actual figure could range between 45.66% and 54.34%.

Vox pop interviews with international tourists

Target group International tourists in London. Data collected at Trafalgar Square, South Kensington, Leicester Square, Greenwich, Covent Garden, Westminster and Southbank.

Data collection method Vox pop interviews, 5 minutes

Sample size 70

Date of fieldwork June - July 2019

morris hargreaves mcintyre

Europe (Manchester) office
+44 (0) 161 839 3311
hello@mhminsight.com

Australia (Sydney) office
+61 (0) 400 123 562
sydney@mhminsight.com

New Zealand (Auckland) office
+64 (0) 9 551 7776
auckland@mhminsight.com

mhminsight.com

Morris Hargreaves McIntyre is an international consultancy.

We work with charities, heritage and cultural organisations of all sizes.

We're fascinated by what makes people and organisations tick.

Our strategic thinking, insight and creativity transform how our clients see their world.

Our clients use our work to connect more people, more deeply, with their causes, fuelling their success.

'Museums used to be full of old things where you looked round everything in cases when I was growing up that is what it was, but now there is so much more to do.' [FG]

'There's so much to do in London, there's more and more all the time [...] like the Victoria Market Halls and the various street food places that you can go to, and escape rooms and Crystal Maze.' [FG]

morris hargreaves mcintyre

mhminsight.com