

**RENAISSANCE**  
museums for  
changing lives



# **Renaissance 2003 Visitor exit survey: final national report**

**Research study conducted for MLA**

January 2004

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## Introduction

This report sets out the findings from a national museum and gallery visitor profiling survey conducted for MLA Council. This report has been compiled by MORI (Market & Opinion Research International), based on research findings from MORI (the Northern sites) and two other organisations; Synovate (Southern museums and galleries) and Vector research (those in the Midlands).

## Research Objectives

The publication of the policy document, 'Renaissance in the Regions' in October 2001 set a new framework for museums and galleries in England. Regional hubs of excellence have been established to promote best practise and high quality standards for the museums and galleries to follow.

Nine regional hubs have been established each with a network of four or five museums/galleries. The DCMS has granted £70 million over the next four years to support the development of these regional hubs and to implement the recommendations arising from the policy document 'Renaissance in the Regions'. Thus far, three regions have been identified to spearhead the project (North East, West Midlands and South West), with funding coming on-stream over the last few months.

As part of those recommendations, MLA Council has identified eight priority areas where the additional funds will be focused. These are:

- Developing a comprehensive service to schools
- Reaching a wider community
- Programme for redisplay of permanent collections
- Enhancing the care, management and conservation of collections
- Improving access to knowledge and information
- Developing the workforce
- Reaching and exceeding existing standards
- Operating effectively and efficiently to deliver high quality services

Relevant and timely monitoring and evaluation will form a key element of this process and will enable MLA Council to assess the impact the Renaissance investment is having on these priority areas.

MLA Council needs to evaluate the impact these regional hubs are having, and will have, on 'stimulating change in the profile of visitors to museums'. This area of development clearly supports the objective of 'reaching a wider community'.

This baseline study provides data on the profile of visitors to museums and galleries across the country, as well as data based on visitor satisfaction and their attitudes towards museums and galleries. These findings will provide MLA

Council with baseline evidence, against which the success of the Renaissance investment will be measured in the future.

The major objectives of this research study are to:

- Collect reliable and accurate data on the profile of visitors to museums / galleries in the regional hubs.
- Use the data to assess the success of the Renaissance investment both now and throughout the coming years.

## **Methodology & Sampling**

Working closely with MLA Council, MORI, Synovate and Vector developed a quantitative questionnaire, designed to elicit information on the demographic profile of visitors to museums and galleries, as well as to gauge their levels of satisfaction and their attitudes towards museums and galleries.

The sample of museums and galleries was provided by MLA Council, and targets were established for each location, based on historic data such as footfall figures. A table of the participating museums and galleries is appended.

The fieldwork period ran from 20<sup>th</sup> October – 16<sup>th</sup> November, although interviewing only took place during the school half term week and the following two weekends in November. Potential respondents were approached randomly as they approached the exit to each museum or gallery. Respondents had to have been inside and around the museum or gallery (i.e. not just visiting the shop or café) and to be nearing the end of their visit.

## **MORI Normative Database**

Where appropriate, this report makes reference to MORI's normative database of visitors to museums, galleries and attractions. This has been compiled at a number of leading attractions over the course of the last 14 years, and now comprises over 55,000 interviews. The results of this survey are compared to these norms, in order to show how the results differ from other locations where we have conducted research.

## **Publication of the Data**

Our standard Terms and Conditions apply to this, as to all studies we carry out. Compliance with the MRS Code of Conduct and our clearing of any copy or data for publication, web-siting or press release which contains any data derived from MORI research is necessary. This is to protect our client's reputation and integrity as much as our own. We recognise that it is in no one's best interests to have survey findings published which could be misinterpreted, or could appear to be inaccurately, or misleadingly, presented.

## **Executive Summary**

### **Visitor Profile**

- Around two-thirds of visitors to regional museums and galleries live fairly locally – either within the same town/city or the extended region. Relatively few (particularly outside of London) visit from overseas.
- Museum visiting is biased a little towards:
  - Women;
  - People aged 35-54;
  - Those of white ethnic origin.
- It is heavily biased towards ABC1s (76% of museum visitors vs. 51% of the population) and people educated to Bachelors or Postgraduate degree level (42% vs. 17%).

### **Party Composition**

- More than two in five parties contain children. It should be noted, though, that the fieldwork period – during the Autumn half-term holiday – will have impacted on this finding.
- The most common party profile, however, is for two adults to visit together, with no children.
- The majority of children who accompany adults tend to be of school age. However, very few trips are prompted by children having visited on a school trip and wanting to return to the museum or gallery.

### **Frequency of Visits**

- Around two in five of those in museums and galleries are repeat visitors – having been before within the last 12 months. During this period, repeat visitors notch up an average of nearly five visits each.
- Four in five visitors have also been to other museums or galleries during the last year. Again, the average number of visits to other institutions stands at just under five.

### **Visitor Satisfaction**

- Visitor satisfaction is high; 96% in total say they are satisfied (71% 'very satisfied'). This is matched by enjoyment levels – 97% of visitors say they had an enjoyable time. Just 3% disagree with the notion that the museum or gallery they have visited is imaginative and exciting.
- There is strong support for the notion that museums and galleries are good places to browse and meet friends.

## **The Impact of Museums & Galleries**

- Museums and galleries are particularly effective at inspiring curiosity among their visitors (86%), and in imparting new knowledge and understanding (83%).
- Around two-thirds of visitors say they feel inspired by their visit, whilst three in five say the museum or gallery has 'moved' them.
- Visitors are relatively evenly split as to whether their trips to museums or galleries have motivated them to do something else related to their visit, left them feeling more creative, or feeling more tolerant of other people and other people's cultures. In each case more than four in ten feel each way.
- Just one in five visitors say that their museum or gallery visit has taught them new skills.

## **The Role of Museums and Galleries**

- More than nine in ten visitors agree that:
  - Museums and galleries are places where children can learn things they do not in the classroom;
  - Museums and galleries play a vital role in the presentation of our heritage.
- Almost four in five also agree that museums help them to understand more about the local area and its people.

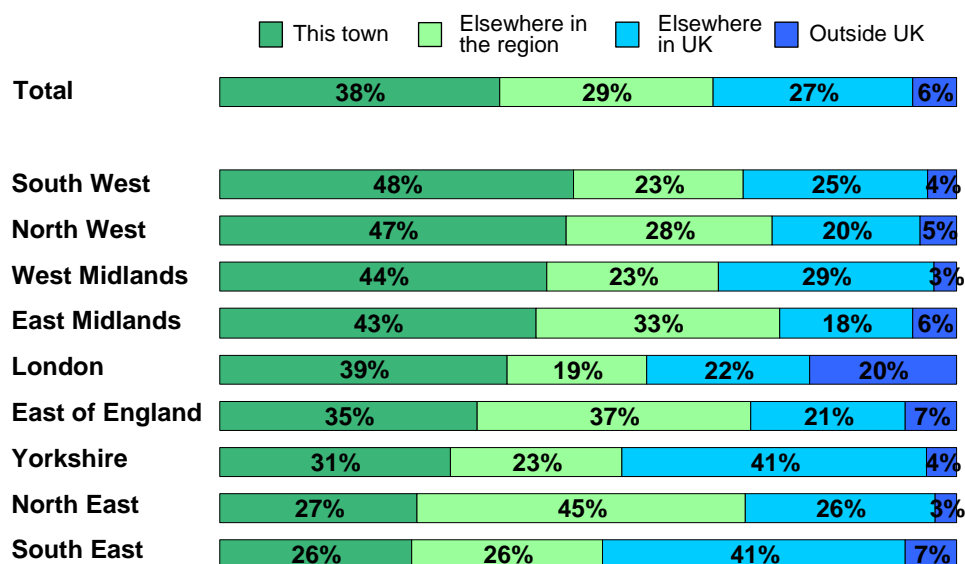
## Main Findings

### Visitor Profiles – Place of Residence

Around two in five visitors to museums and galleries in England (38%) live in the same town as the institution, while a further 29% live within the same region. Overall, just 6% visit museums and galleries from overseas, although, as might be expected, this rises dramatically to 20% within London. There are significant differences between regions; 48% of those visiting South West museums live in the same town, compared to 26% in the South East. Museums and galleries in the South East and Yorkshire attract the largest proportions of visitors from elsewhere in the UK.

#### Place of Permanent Residence – By Region

##### Q6. What is your place of permanent residence?



Base: All Visitors (17,578)

Source: MORI

Young people (aged 16-34) are significantly more likely than others to live either in the same town as the museum or to have come from overseas – there is relatively less intra-regional visiting among this age group. Social class and educational qualifications also have an effect – those classified as being in classes D or E (54%), and people who left school at 16 or below (43%) are decidedly more likely than average to visit museums within the town where they live

### Visitor Demographics

Women make up a slightly higher proportion of museum visitors than men (56% and 44% respectively). This may be influenced a little by the timing of the research – during half term holiday when more women may have been influenced to visit with their children. (In fact, women make up 60% of those with children in their party.)

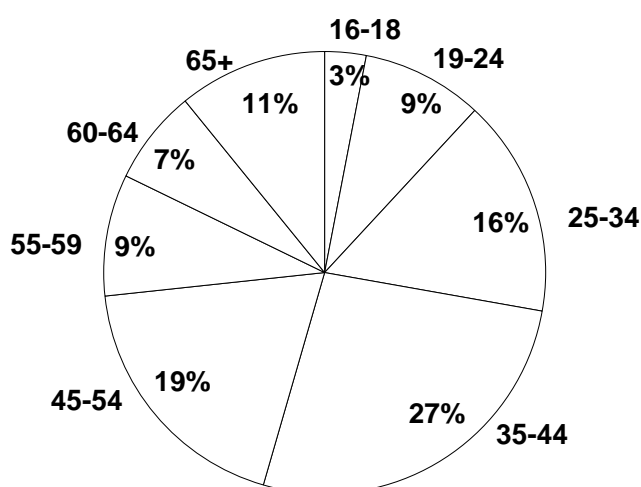
Among those educated to degree level or above, the gender split is more evenly balanced (53% women and 47% men). Among groups visiting from overseas, the balance actually tips marginally the other way – 51% are men. Women are particularly likely to predominate in the East of England (65%), East Midlands, and South West (both 60%).

These museums and galleries attract a higher proportion of women than in the MORI norm, (51% men versus 49% women). This is reflected in the fact that the London scores (where much of the normative data are collected) are closer than average to an equal gender split.

The largest proportion of museum visitors are aged between 35-54. This group make up just under half of all those visiting museums and galleries, with an equal split of younger and older visitors. It is perhaps a little concerning that people aged 16-24 make up just 12% of all museum visitors (compared with 15% of the adult population), although it is unclear whether this signifies that people generally tend to visit more frequently as they get older, or if this is the start of a general decline in museum visiting.

### Age Profile

**Q. Which of the following age groups do you fall into?**



Base: All Visitors (17,578)

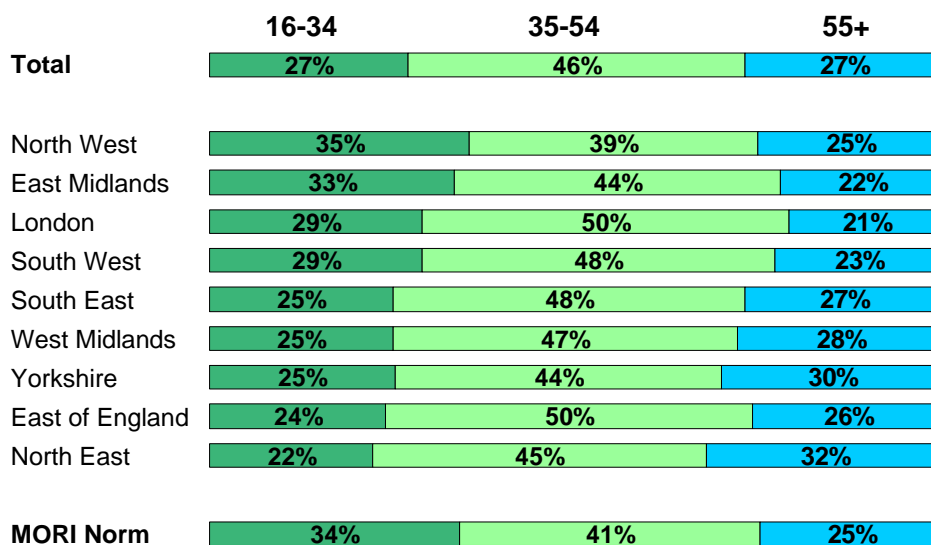
NB. Figures may not add to 100%, where 'don't know' & 'not stated' have been excluded

Source: MORI

Compared to the MORI normative database, these results show a significantly lower proportion of young people visiting regional museums and galleries (34% and 27% respectively). Young people are particularly likely to visit museums in the North West and East Midlands. Yorkshire and North East museums, on the other hand, attract the largest proportions of visitors aged 55 and above.

### Age Profile – By Region

**Q. Which of the following age groups do you fall into?**



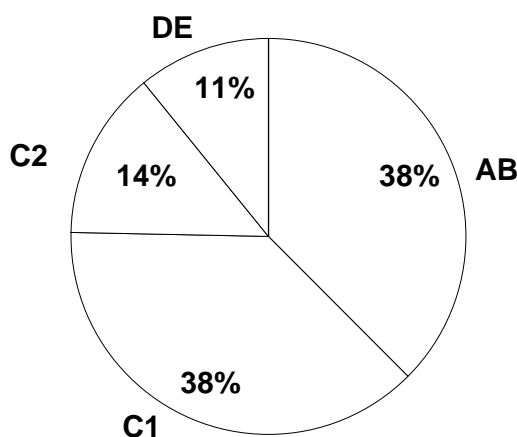
Base: All Visitors (17,578)

Source: MORI

Among those of non-white ethnic origin, the age profile of visitors is significantly different. Younger people (aged 16-34) make up 55% of all Black and Minority Ethnic visitors to museums and galleries, whilst those aged 55+ account for just 5%.

Compared to the British population, museum and gallery visiting remains dominated by those of 'higher' social classes. While just over half the English population is classified as ABC1, this rises to 76% among those visiting museums and galleries – equally split between ABs and C1s.

### Social Class Profile

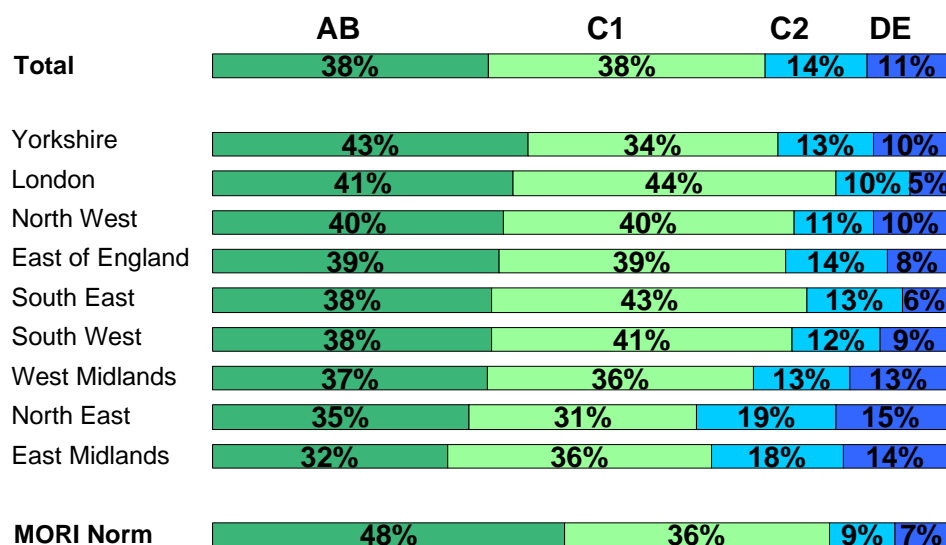


Base: All giving an answer (15,634)

Source: MORI

Whilst this is not particularly encouraging in terms of encouraging social inclusion, the results are a little more evenly spread out than the MORI normative database, where just 16% of all respondents are from C2DE social classes. Visitors in Yorkshire and London are the most likely to be from ABC1 backgrounds, whilst museums and galleries in the North East and East Midlands attract the highest proportions of C2DEs.

### Class Profile – By Region



Base: All giving an answer (15,634)

Source: MORI

Educational qualifications and social class have a tendency to go hand in hand, so it is perhaps not surprising to learn that more than two in five museum/gallery visitors (42%) have a degree or even a postgraduate qualification. This is in contrast to the figure of 19% of the population holding such a qualification. Men are a little more likely than women to have achieved such a qualification (45% and 40% respectively). As might be expected, visitors in London are significantly more likely to hold a degree than those elsewhere (55% have a degree, including 25% with a postgraduate qualification). Museums in the North East and East Midlands attract the lowest proportions of graduates.

Around one in nine museum visitors (11%) left school without any qualifications (the majority of this group being aged 55+), while for 16%, O levels or their equivalent represent their highest level of educational qualification. Among the wider population, these proportions are 26% and 28% respectively.

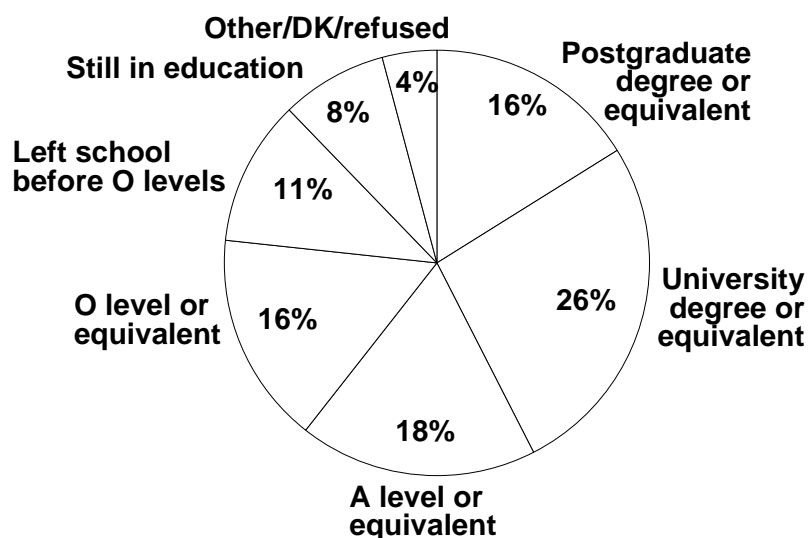
Museums in the North West attract the largest proportion of people who are still studying -15%, which is twice as high as in the rest of the country.

People who visit museums without children are a little more likely than average to have a degree. Similarly, those with degrees tend to travel further afield –

the proportion of people visiting museums from other parts of the country (rather than just locally) tends to rise in line with educational qualifications.

## Educational Qualifications

Q. *What is the highest level of achievement you have completed?*



Base: All Visitors (17,578)

Source: MORI

Just 7% of visitors to museums and galleries consider themselves to have a disability, long-term illness or health problem which limits their daily activities or work. As might be expected, this proportion rises among older people (14% among the 55+ age group), and DEs (15%). Museums in the North East also attract a higher than average proportion of people with health problems or disabilities (15%). (The 2001 Census recorded that 18% of the English population suffered from a limiting long-term illness.)

Compared to the English population, the ethnic profile of museum and gallery visitors is slightly biased towards those from a white background. In the 2001 Census, 91% of the English population described themselves as white. This compares to 96% of those regional museum visitors who are not visiting from overseas. People of Asian origin make up the largest non-white ethnic group, at 2%, with Blacks accounting for 1%. As might perhaps be expected, given the make-up of the population, London museums attract the highest proportion of Black and minority ethnic visitors, although even here they account for just 7% of museum visitors.

## Visit Patterns

### Party Composition

Given that the fieldwork for this research took place during a half term holiday and at weekends, it is perhaps not surprising that just over two in five visit parties (43%) contained children. Most of these groups included either one or two children (both 18%). The MORI normative data on museum and gallery visiting shows a total of 28% of parties containing children. Adults tend to visit

either in couples (47% of all groups) or on their own (36%). The breakdown of visitor groups is set out in the table below.

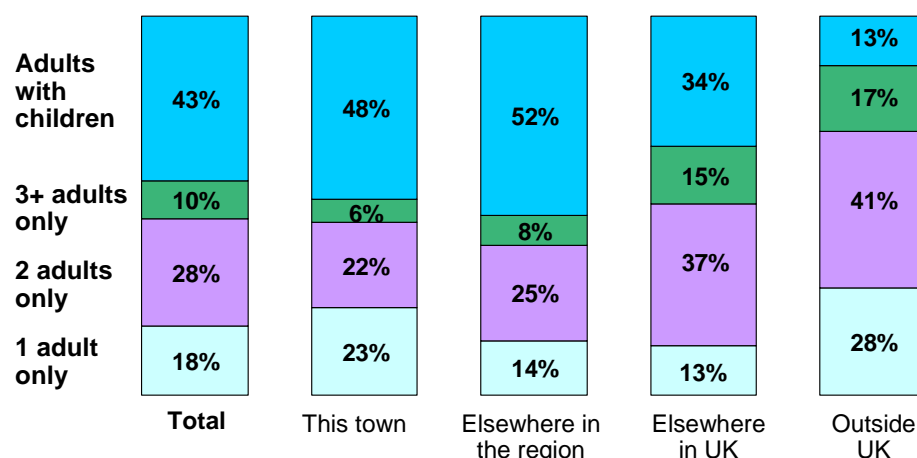
<b>Party Composition</b>	
	%
1 adult & no children	18
2 adults & no children	28
3+ adults & no children	10
1 adult & 1 or more children	17
2 adults & 1 or more children	19
3+ adults & 1 or more children	7
Base: 17,578	
Source: MORI	

As might be expected, those visiting with children are more likely than average to be women (47% of women come with children), and aged 35-54 (57%). They are also more likely than average to come from social classes C2DE (54%), and to have been educated only up to O level/GCSE standard (55%). This perhaps reflects the fact that these groups tend to be less inclined to visit museums or galleries without an external impetus such as a prompt from their children.

Repeat visitors are more likely than average to visit alone (25%), as are 16-34 year olds (23%), men (23%), and people educated to degree level (21%). The place of residence also has a significant impact on visit party composition. Visiting alone tends to be done most by people who live very locally, or who come from overseas. Overseas visitors are also more likely than average to visit in adult only groups, whilst people who visit from elsewhere within the region are particularly likely to come with children.

### Party Composition – By Place of Residence

**Q5a. Including yourself how many adults/children do you have in your party?**



Base: All Visitors (17,578)

NB. Figures may not add to 100%, where 'don't know' & 'not stated' have been excluded

Source: MORI

The majority of children who accompany adults, are at school (87%). The only groups who are a little more likely to visit with younger children are those educated to degree level (15% of those in this group who are accompanied by children are visiting with youngsters who are not yet at school), and people visiting from overseas (23%).

Visiting museums with children does not, however, tend to be prompted by previous school visits. Just 16% of those with children in their party say they are visiting because one or more children had been to the museum on a school trip and wanted to return. As might be expected, people living locally (21%) are a little more likely than average to cite this as a reason for visiting. Regionally, only Yorkshire stands out, where school visits prompt just 9% of those with children of school age to return to a museum.

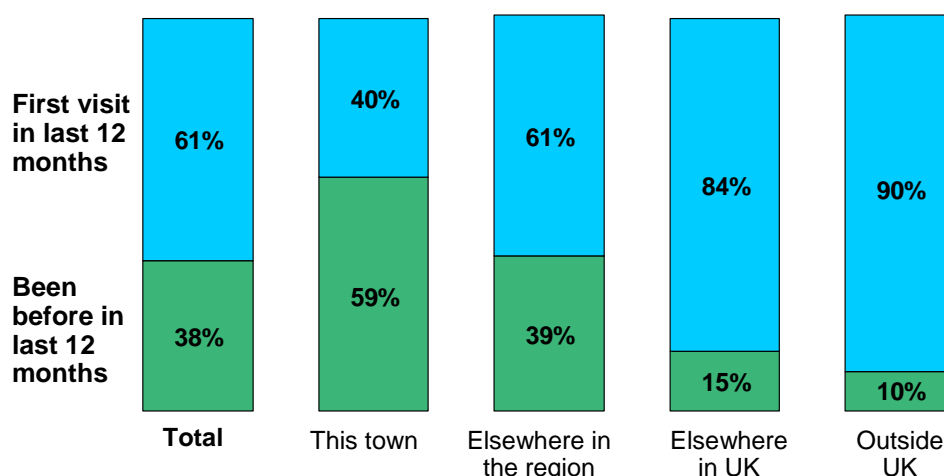
### Frequency of Visits

Three in five visitors to regional museums and galleries (61%) are on their first visit to that site in the last 12 months. Repeat visiting, at 38% within the last year, is fairly high, given the MORI Norm figure of 49% repeat visits over an undefined period. (Within this group, we estimate that around half have visited in the last year, thus giving an overall 'repeat visit within the year' score of c25%.)

Among most sub-groups, this 3:2 ratio of first to repeat visits holds firm. However, among older people (55+) and DEs, there is a significantly higher proportion of repeat visitors. As might be expected, people living locally are decidedly more likely to be repeat visitors, with incidence dropping with distance from the museum.

### Visit Frequency – By Place of Residence

**Q1a. Is this your first visit to this museum/gallery in the last 12 months, or have you visited before?**



Base: All Visitors (17,578)

NB. Figures may not add to 100%, where 'don't know' & 'not stated' have been excluded

Source: MORI

Regionally, the highest levels of repeat visiting are in the North West (48%) and South West (47%), while the lowest levels are in London (22%) and the East of England (27%).

Among repeat visitors, the average number of visits during the course of the last 12 months is a staggering 4.7, including 15% who have visited the museum or gallery 11 or more times. Not only are DEs and those aged 55+ more likely than average to be repeat visitors, among this group they also have the highest levels of repeat visiting (average visit numbers of 5.3 and 5.1 respectively).

London museums - where the sheer number of alternatives must surely play a part - generate the lowest average repeat visit levels (3.8), while the North East (5.2) has the highest average. Not surprisingly, local visitors have significantly higher levels of repeat visiting than those living further away.

One in five museum visitors (21%) have not been to any other museums or galleries during the course of the last 12 months. Interestingly, this does not vary significantly between those who are on their first visit to this museum during that period (22%) and those who are on a repeat visit (19%). Overall, the average number of visits to other museums or galleries over the course of the year is 4.8, with around one in eight people (12%) having been to museums on 11 or more occasions.

ABs have a particularly high average number of visits (6.0), as do those educated to degree level (6.4). Reinforcing the theory that museums in London face more competition from other attractions, museum goers in London have the highest average of 6.1, including 16% who have been to museums or galleries more than 11 times in the last year.

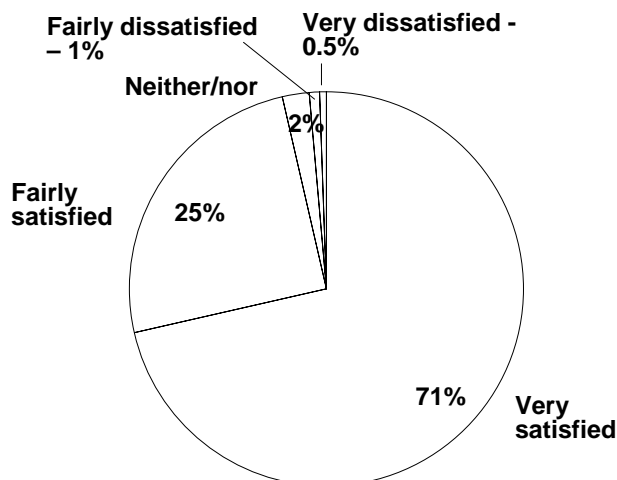
Frequency of Visits	This museum/ gallery in last 12 months (6,767) %	Other museum/ gallery in last 12 months (17,578) %
	Once	19
Twice	21	14
Three times	15	12
Four times	10	8
Five – Ten times	18	20
More than ten times	15	12
None	N/A	21
Source: MORI		

## Visitor Satisfaction

Levels of satisfaction with museums visited are very high. Seven in ten visitors (71%) describe themselves as being 'very satisfied', with a further 25% 'fairly satisfied'. In total, fewer than 2% feel that their visit was unsatisfactory. These findings are very much in line with the MORI normative database figures.

### Satisfaction

**Q2. How satisfied were you with your overall visit?**



Base: All Visitors (17,578)

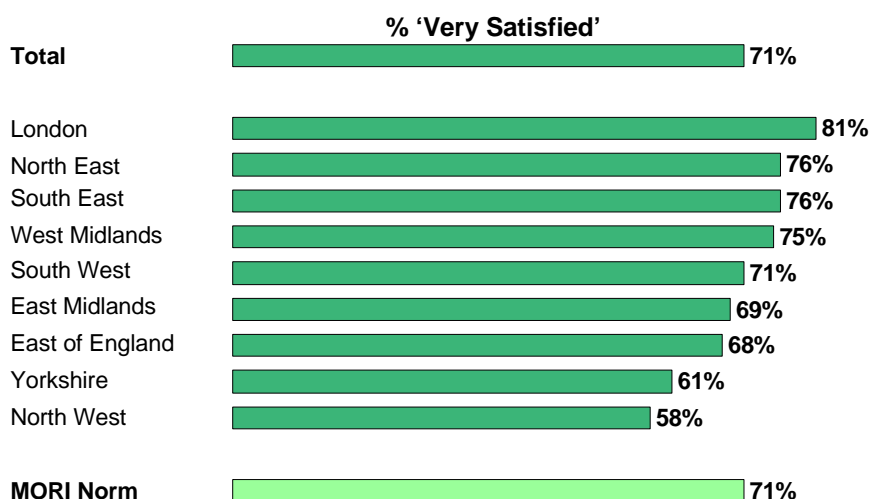
NB. Figures may not add to 100%, where 'don't know' & 'not stated' have been excluded

Source: MORI

Women (73%), those aged 55+ (78%) C2DEs (74%), people with O levels or no qualifications (77%), and those visiting with children (75%) are more likely than average to describe themselves as being 'very satisfied' with their visit. There are also some significant differences between regions in terms of visitors feeling 'very satisfied', with London particularly high, but the North West and Yorkshire some way behind the other regions.

### Satisfaction – By Region

**Q2. How satisfied were you with your overall visit?**



Base: All Visitors (17,578)

Source: MORI

Although levels of dissatisfaction remain low, people visiting regional museums from overseas are a little less likely to describe themselves as being 'very satisfied' (67%). Young people (aged 16-34) are even less likely to feel this way – 61%.

It is likely that these high levels of visitor satisfaction go hand in hand with the high levels of enjoyment that visitors experience. A total of 97% of visitors describe themselves as having had 'an enjoyable visit', with just 1% in disagreement.

## Overall Perceptions of Museums

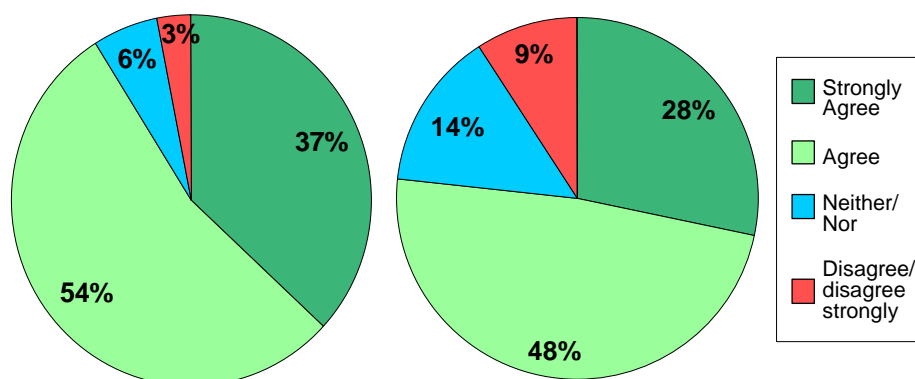
Nine in ten visitors (91%) agree that 'this museum/gallery is an imaginative and exciting place to visit'. Like the displays, however, they are decidedly less likely to 'strongly agree' (37%) than to simply agree (54%), leaving room for improvement. Those who are most likely to have their imagination captured are older (55+: 43% 'strongly agree'), those educated up to O level standard (41%), and people visiting with children (40%).

### Visiting Museums & Galleries

Q4 Thinking about your visit here today, to what extent do you agree or disagree that this museum/gallery...

*.. is an imaginative and exciting place to visit*

*.. is an appealing place to browse and meet friends*



Base: All Visitors (17,578)

NB. Figures may not add to 100%, where 'don't know' & 'not stated' have been excluded

Source: MORI

Once again, there are significant regional differences, with London leading the way (48% agree strongly), while the North West (27%) and Yorkshire (29%) bring up the rear. (In no region, though, does disagreement reach more than 4%.)

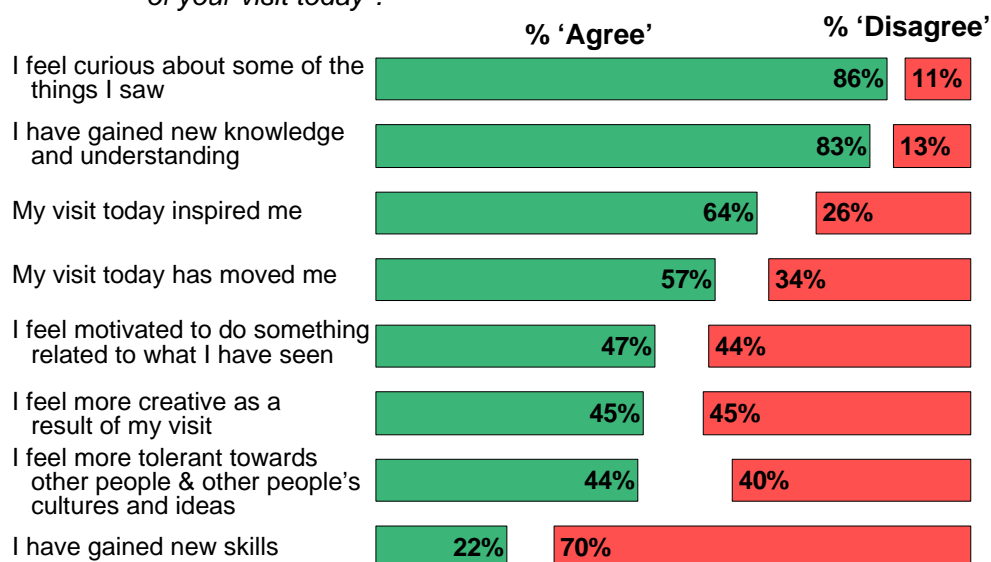
Three-quarters of visitors (76%) agree that the museum/gallery is an appealing place to browse and meet friends. Just under three in ten (28%) agree strongly. Women (31%), people aged 55+ (34%) and repeat visitors (33%) are most likely to agree strongly with this notion. Museums in the West Midlands lead the way in providing an appealing place to meet friends (39% agree strongly), while, once again, the North West (19%) and Yorkshire (21%) are less well regarded.

## Impacts of Museum & Gallery Visits

Museums and galleries play an important role in many ways, not just in imparting knowledge, but also inspiring, moving, and motivating further activity.

### Results of Museum Visiting

Q2. Which of these statements, if any, describe what you got out of your visit today?



Base: All Visitors (17,578)

Source: MORI

## Learning & Skills Development

As befits the traditional role of museums and galleries as places of learning, it is encouraging that 83% of all visitors say they have gained new knowledge and understanding as a result of their visit. Not surprisingly, this is higher among first time visitors to each institution (86%), but four in five repeat visitors (79%) also feel they gain knowledge through their visit, which demonstrates the ability of museums to keep on providing an educational role. Learning and satisfaction clearly go hand in hand (although it is unclear where the roles of 'cause' and 'effect' lie), as while 85% of those who are satisfied with their visit say they gained new knowledge, this falls to 41% of those describing themselves as dissatisfied with their visit.

There is not very much regional variation in learning, but London stands out a little, in that 91% agree they have gained new knowledge and understanding, particularly compared with Yorkshire, where this falls to 78%. Those visiting from overseas are a little more likely than others to gain new knowledge.

Whilst most visitors agree that they gain new knowledge, skills development is less in evidence. Just over one in five visitors (22%) agree that they have gained new skills as a result of their visit. This is presumably largely accounted for by the passive nature of museum and gallery visiting, which tends to encourage people to look and learn, but not necessarily to participate or even to understand how objects were created.

Encouragingly, young people are a little more likely than average to say they have picked up new skills (16-34: 26%), as are C2DEs (27%), and those from non-White ethnic backgrounds (33%). People visiting museums with children are also more likely than others to learn new skills (25% vs 20%), as are people who visit from outside the UK (33%). Skills development ranges quite dramatically by region, as the table below shows:

<b>“I have gained new skills as a result of my visit”</b>	
	Agree %
<b>Total</b>	<b>22</b>
East Midlands	33
London	26
West Midlands	25
South East	22
East of England	21
North East	21
North West	20
South West	19
Yorkshire	14
Base:17,578	
Source: MORI	

## Other Impacts

The most likely impact of a visit to a regional museum or gallery is to feel curious about the things that are on display. Six in every seven visitors (86%) agree that they feel curious about some of the things they have seen. This is slightly higher among those aged 54 or under, ABC1 visitors, and people educated to degree level.

Two-thirds of visitors (64%) feel inspired by their visit, whilst three in five (57%) feel moved. It is very encouraging that museums and galleries, displaying real objects, are able to invoke these sensations in their visitors. In both cases, women are a little more likely than men to feel that their museum visit has evoked these responses. Repeat visitors are more likely than those on their first visit to feel inspired (67% and 63% respectively). Older people (aged 55+) are particularly likely to feel moved by their visit (63% vs 55% among younger visitors).

Whilst there is little regional variation in terms of the ability to move visitors, inspiration does vary by region.

<b>“My visit today inspired me”</b>	
	Agree %
<b>Total</b>	<b>64</b>
South West	73
South East	70
West Midlands	69
London	68
East of England	63
North West	63
East Midlands	61
North East	58
Yorkshire	56
Base:17,578	
Source: MORI	

Museums inspire motivation and creativity in equal measures. Just under half of all visitors (47%) agree that they feel motivated to do something related to what they have seen in the museum, whilst 45% agree that they feel more creative as a result of their visit. These appear to imply that museums are not just providing an interesting diversion for a few hours, but that they are actively encouraging visitors to go out and do things following their visit.

Motivation is highest among young people (16-34: 50%), non-whites (55%), those educated to degree level (50%), and repeat visitors (52%). Regionally, it is only among visitors to museums in Yorkshire and the North East (both 39%) where levels of motivation drop below 47%. The feeling of creativity is also highest among exactly the same types of visitor, and also lowest in the same two regions.

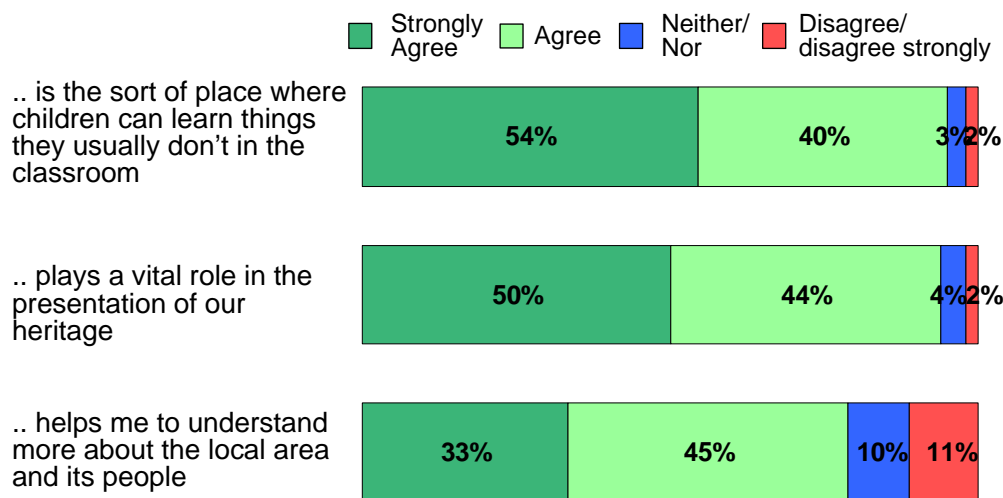
Another positive outcome of museum visiting is that 44% agree that they feel more tolerant towards other people and other people's cultures as a result of their visit (40% disagree with this statement). A feeling of greater tolerance is particularly strong among C2DEs (52%), those educated to O level standard or below (52%) and non-whites (59%). Museums and galleries in the East Midlands stand out as being particularly effective in inspiring tolerance (51% agree), whilst those in London (31%) lag behind.

## **The Role of Museums and Galleries**

The roles played by museums and galleries are many and varied. Two issues that virtually all visitors agree on are that museums are the sorts of places where children can learn things they usually do not in the classroom (93% agree, 54% 'strongly agree'), and that museums play a vital role in the presentation of heritage (93% agree, 50% 'strongly agree').

## Role of Museums & Galleries

Q4 Thinking about your visit here today, to what extent do you agree or disagree that this museum/gallery...



Base: All Visitors (17,578)

NB. Figures may not add to 100%, where 'don't know' & 'not stated' have been excluded

Source: MORI

The role of museums in providing an additional educational resource for children is particularly appreciated by C2DEs (59% strongly agree), people whose own education stopped either at or before O levels (60%), and those with children in their party (61%).

There is also a wide regional variation in acceptance that museums fulfil this role.

<b>“This museum/gallery is the sort of place where children can learn things they usually don't in the classroom”</b>	
	Strongly agree %
<b>Total</b>	<b>54</b>
London	65
West Midlands	62
North East	58
East Midlands	56
South East	54
South West	52
East of England	50
North West	43
Yorkshire	42
Base: 17,578	
Source: MORI	

The role that museums and galleries play in presenting our heritage is relatively evenly accepted among all visitor groups. It is perhaps a little concerning that

those who live locally are no more likely than people travelling from further afield to consider that museums fulfil this role.

The range of museums and galleries in which the fieldwork took place will have impacted strongly on this issue – some are clearly more overtly concerned with heritage than others (e.g. Blists Hill, Beamish Open Air Museum etc.). This will presumably account for the strong regional variations recorded – levels of ‘strongly agree’ range from 36% in the North West up to 64% in the West Midlands.

Linked to the heritage presentation issue is the ability of museums or galleries to help people understand more about the local area and its people. One in three visitors strongly agree that the museum does this, with 78% in overall agreement. Young people (16-34: 28%) are marginally less likely to feel this way.

Once again, museums and galleries in different regions have significantly different success rates in this role.

<b>“This museum/gallery helps me understand more about the local area and its people”</b>	
	Strongly agree %
<b>Total</b>	<b>33</b>
West Midlands	48
North East	42
London	35
East of England	33
East Midlands	31
South East	30
South West	29
Yorkshire	24
North West	16
Base: 17,578	
Source: MORI	

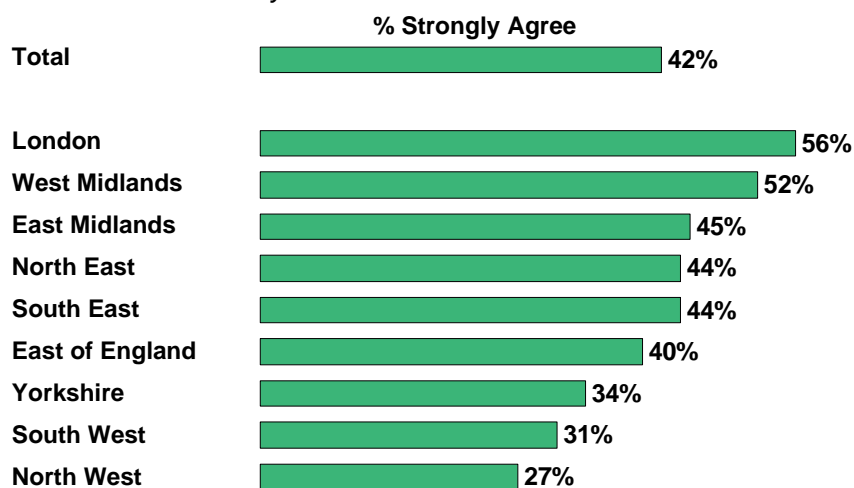
## Displays

Nine in ten visitors (91%) agree that museum or gallery they are visiting displays its collections in a way that makes it easy for them to understand. People are more likely simply to agree (49%) than to agree strongly (42%) with this, though, which leaves some room for improvement in terms of enhancing the experience for all visitors. Curiously, though, the highest levels of strong agreement are among those educated only up to O level/GCSE standard (47%), and those visiting with children (46%). Does this mean that museums have managed to make their presentations accessible at a basic level to everyone, but to be neglecting those with a desire for more detailed information?

Once again, there are also strong regional differences between museums on this score, with museums in London faring particularly well, and those in the North West least successful.

### Collection Display

Q4 *Thinking about your visit here today, to what extent do you agree or disagree that this museum/gallery displays its collections in a way that makes it easy for me to understand*



Base: All Visitors (17,578)

NB. Figures may not add to 100%, where 'don't know' & 'not stated' have been excluded

Source: MORI

## Implications

At this very early stage, it would appear that the immediate impact of Renaissance funding is fairly limited. Museums and galleries in the three Phase One hubs are a little more likely than average to be attracting repeat visitors, to achieve positive satisfaction scores, and to be attracting people with either just O levels/GCSEs or no qualifications at all. In all other aspects, though, there is no consistency between the three regions. It is difficult, therefore, to draw the conclusion that these positive findings are, in fact, a direct result of the additional cash injection. This demonstrates that it takes time to bring about significant change in museum going habits.

Museum visiting is dominated by middle class, middle aged, well educated people. ABC1s account for around half the British population, but three-quarters of visitors to regional museums and galleries. Encouragingly, however, this is a significantly lower proportion than the MORI Normative database, which is largely based on national London-centred institutions (84% ABC1). Similarly, whilst 42% of visitors to museums and galleries hold a Bachelors or Postgraduate degree, within the wider population this falls to just 17%. The museum-visiting population is biased towards those in the 35-54 age group, but in many ways this is encouraging, as a larger proportion of these visitors bring children with them, introducing young people to museums and galleries at an early age. These findings are very much in line with previous research on museum visiting undertaken among the GB population by MORI, on behalf of MLA Council in 1999 and 2000.

Around two in five of those found in regional museums and galleries are repeat visitors – having been one or more times in the last year. It is heartening to see a fairly high repeat frequency, as this indicates that if only museums can attract people through the door, they are often likely to come back again and again. The implication, therefore, is that museums face a certain image problem in attracting first time visitors – there is still a perception among some groups that ‘museums are not for me’. If the perceived barriers can be broken down, clearly museums and galleries have a lot to offer. (This is underlined by the fact that the highest satisfaction ratings recorded are among C2DEs, and people with few educational qualifications – the types of group who traditionally tend not to visit in large numbers.)

Satisfaction levels are particularly high, with 71% describing themselves as ‘very satisfied’ with their visit. This is exactly the same proportion as the MORI Normative database, which clearly indicates that regional museums and galleries can compete effectively with the National institutions in providing excellent experiences.

Museums and galleries are succeeding particularly well in inspiring curiosity and imparting knowledge. Very few visitors do not feel that the institutions achieve this. Many also feel inspired, moved, more creative, motivated to do more, and even tolerant of other people and cultures as a result of their visit. Museums and galleries are not, however, generally imparting new skills, although this is perhaps asking a great deal within the confines of a relatively short average dwell time.

Visitors feel strongly that museums and galleries have an educational role to play. The vast majority agree that children can learn things that they would not be able to in a classroom, which argues for greater involvement of museums and galleries in the National Curriculum and closer co-operation with local schools and colleges.

It is highly encouraging to note that whilst most people agree that museums and galleries display objects in a way that makes it easy for them to understand, the strongest agreement is among those with few educational qualifications - who are often regarded as being excluded by a rather high-brow tone. People visiting with children are also more likely than average to strongly agree. Museums, it would seem, are pitching their displays at a level which is accessible to all, further reinforcing the need to concentrate on encouraging others through the door, in order to find out more about what they are missing.

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## Appendices

## Participating Museums & Galleries

<b>Museums and Galleries</b>	<b>Interviews achieved</b>
<b>North East</b>	
Newcastle Discovery, Newcastle	939
Sunderland Museum and Art Gallery	799
North of England Open Air Museum (Beamish)	505
Bowes Museum	403
Museum of Hartlepool	236
<b>North West</b>	
Manchester Art Gallery	899
The Whitworth Art Gallery, Manchester	329
The Manchester Museum	539
Tullie House, Carlisle	125
Harris Art Gallery, Preston	500
Bolton Central Museum and Art Gallery	330
<b>Yorkshire</b>	
The Millennium Galleries, Sheffield	505
Cartwright Hall, Bradford	30
Town Docks Museum and Ferens Art Gallery, Hull	277
York Castle Museum and York City Art Gallery	654
Leeds City Art Gallery	357
<b>West Midlands</b>	
Central Museum and Art Gallery, Birmingham	1,097
The Potteries Museum, Stoke on Trent	571
Blists Hill (Ironbridge Gorge Museums Trust), Telford	532
Herbert Art Gallery, Coventry	229
Wolverhampton Art Gallery	287
<b>East Midlands</b>	
Derby City Museum and Art Gallery	257
New Walk Museum and Art Gallery, Leicester	686
The Castle Museum, Nottingham	571
Snibston Discovery Park, Coalville	269

<b>Museums and Galleries</b>	
	<b>Interviews achieved</b>
<b>East of England</b>	
Fitzwilliam Museum, Cambridge	301
Norwich Castle Museum and Art Gallery	440
Luton Museum	199
Colchester Castle Museum	217
<b>South East</b>	
Chatham Historic Dock Yard	239
Ashmolean Museum, Oxford	225
University Museum of Natural History/Pitt Rivers Museum, Oxford	175
Milestones. Hampshire	232
Brighton Museum and Art Gallery	495
<b>South West</b>	
City Museum and Art Gallery, Bristol	689
Albert Memorial Museum, Exeter	304
Royal Cornwall Museum, Truro	100
City Museum and Art Gallery, Plymouth	175
Russell-Cotes Art Gallery, Bournemouth	184
<b>London</b>	
London's Transport Museum	516
The Horniman Museum, London	284
The Geffrye, London	180
The Museum of London	697
<b>Total</b>	<b>17,578</b>

## Sampling Tolerances

Only a sample of the 'population' has been interviewed so we cannot be certain that the figures obtained are exactly those we would have found, had everybody been interviewed (the 'true' values). However, for any percentage given, we can estimate 'confidence intervals' within which the true values are likely to fall. For example, on a question where 30% of the people in a sample of 17,578 respond with a particular answer, the chances are 95 in 100 that this result would not vary by more than 0.7 percentage points from a complete coverage of the entire population using the same procedures. The following table shows that the sampling tolerances vary with the size of the sample and the percentages involved in the visitor survey:

	<b>95 % Confidence Intervals</b>		
	<b>10% or 90%</b>	<b>30% or 70%</b>	<b>50%</b>
<b>Sample Size</b>	$\pm\%$	$\pm\%$	$\pm\%$
17,578	0.4	0.7	0.7
10,723	0.6	0.9	0.9

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

	<b>Margins (%) which are just significant (at 95%)</b>		
	<b>Approximate % to which margin relates</b>		
	<b>10% or 90%</b>	<b>30% or 70%</b>	<b>50%</b>
<b>Sample Size</b>	$\pm\%$	$\pm\%$	$\pm\%$
5,929 and 1,653 (eg ABs vs DEs)	1.6	2.5	2.7
10,723 and 6,767 (eg First time vs repeat visitors)	0.9	1.4	1.5

## Social Class Definitions

This appendix contains a brief list of social class definitions as used by the Institute of Practitioners in Advertising. These groups are standard on all surveys carried out by Ipsos MORI.

<b>SOCIAL CLASS</b>		<b>OCCUPATION OF HEAD OF HOUSEHOLD</b>
A	Upper middle class	Higher managerial, administrative or professional
B	Middle class	Intermediate managerial, administrative or professional
C1	Lower middle class	Supervisor or clerical and junior managerial, administrative or professional
C2	Skilled working class	Skilled manual workers
D	Working class	Semi- and unskilled manual workers
E	Those at the lowest levels	State pensioners, etc, with no other of subsistence earning