

RENAISSANCE
museums for
changing lives



Renaissance 2004 Visitor exit survey: final national report

Research study conducted for MLA

July 2005

Contents

Introduction	3
Executive summary	6
Main findings	9
• Museum visit satisfaction	9
• The visitor experience	13
• Attitudes towards museums	16
• Reasons for visiting	20
• Museum visiting	22
Visitor profiles	25
• Party profiles	25
• Place of residence	27
• Visitor demographics	28
Implications	36
Appendices	38
Participating museums and galleries	39
Frontiers analysis explained	41
Sampling tolerances	43
Social class definitions	44

Introduction

This report sets out the findings from a national museum and gallery visitor profiling survey conducted for the Museums Libraries and Archives Council (MLA) by Market & Opinion Research International (MORI).

Research Objectives

Since October 2001 when the 'Renaissance in the Regions' policy document¹ was published, there has been a renewed interest in regional museums and galleries. Nine regional hubs have been established to promote best practice and high quality standards for other museums and galleries to follow. The perceived success of the programme to date has resulted in the recent announcement of an additional £17m of government funding.

Among the key objectives of the policy are the drive to reach a wider community (stimulating change in the profile of visitors to museums), redisplaying permanent collections, improving access to knowledge and information and reaching and exceeding existing standards. These objectives are all therefore tested within the context of this research project. This evaluation will enable the MLA to assess the impact the Renaissance investment is having on these priority areas.

In 2003, a baseline study was conducted in 45 museums and galleries across England, thus providing data on the profile of visitors to museums and galleries across the country, as well as information about visitor satisfaction and attitudes towards museums and galleries. This year's study will therefore concentrate on measuring change since 2003, as well as introducing a number of new question areas.

The major objectives of this research 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 the MLA, MORI 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. As mentioned above, this was based largely on the questionnaire designed

¹ Regional Museums Task Force (2001) *Renaissance in the Regions: a New Vision for England's Museums*. London: Resource

for last year's baseline study, but with a number of amendments to better attain the information desired.

The sample of museums and galleries was provided by the MLA, and was designed to exactly replicate that used in 2003. (One museum was closed this year, thus slightly affecting the overall sample.) Targets were established for each site, based on historic data such as last year's total interviews and footfall figures. A table of the participating museums and galleries is appended², along with the number of interviews aimed for and achieved.

Please note that as different proportions of interviews were conducted at the various participating museums and galleries in 2003 and 2004, this too will have an impact on the overall profile, and thus, perhaps on the responses generated. For example, in 2003, the Central Museum and Art Gallery in Birmingham accounted for 6% of all responses. This museum attracts a far higher proportion of Black and Minority Ethnic (BME) groups than virtually any of the other participating museums. This year, the museum accounts for just 2% of all our responses at participating museums and galleries, and this has had a knock-on effect on the overall ethnicity profile of respondents.

In order to even out any inconsistencies in the numbers of interviews conducted in each wave of the research, it has been decided to weight the responses in line with the numbers of visitors at each site. We have therefore looked at how many visitors went to each site in both 2003 and 2004, and calculated the proportion of all visitors that this represents. The numbers of respondents at each museum were then adjusted to be in line with the known visitor numbers. In this way, as the survey continues, by applying the same weighting approach, the results will always be representative of the views of all those visiting the different museums taking part in the survey. Whilst there will be fluctuations, in line with peaks and troughs in visitor numbers (for example, coinciding with blockbuster exhibitions or closure periods), this is a more reliable approach than relying solely on the numbers of interviews conducted in a short fieldwork period.

A total of 16,741 interviews were undertaken. The fieldwork period ran from 23rd October – 14th November 2004, although interviewing only took place during the school half term week and the following two weekends. 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. (This was checked at the very outset of the interview.)

² Please see appendix 'Participating Museums and Galleries'

Contextual Information

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 15 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.

The report also makes reference to a survey undertaken among the British general public on MORI's Omnibus in January-February 2004³. This covered museum and gallery visiting habits, and updated previous research conducted in 1999. Copies of the full report can be downloaded from the MLA website.

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.

³ MORI (2004) *Visitors to Museums and Galleries 2004*. London: MLA

Executive Summary

Satisfaction

Overall satisfaction with museum visiting remains strong, with 96% satisfied. (There has, though, been a drop in the proportion of visitors describing themselves as 'very satisfied', from 70% to 65%).

Demographically, having a degree tends to correlate positively with satisfaction. Conversely, those who are younger or of Black or Minority Ethnic background are less likely than others to be satisfied with their visit.

Almost all visitors (97%) say they had an enjoyable time, with 53% feeling that their visit was better than expected.

Visitor Experience

Four in five visitors (82%) agree that they have gained new knowledge and understanding as a result of their visit. Around two-thirds agree that they learned more than they had expected to. Furthermore, more than nine in ten visitors say they think museums are places where children can learn things they usually don't in the classroom. (Those visitors who themselves had not had an extensive education are particularly likely to agree with this.) Museums are seen to be inclusive, in that nine in ten agree that the displays make it easy for them to understand.

Nine in ten visitors feel that museums are imaginative and exciting places. However, whereas two in three visitors leave museums feeling inspired, the proportion who say they actually feel motivated to do something as a result of their visit is lower, at just over two in five (including 10% who agree strongly that this is the case).

Since 2003 there has been a slight decline in 'net agreement' with the statement that "this museum helps me to understand more about the local area and its people". Perhaps linked to this, the largest single group of visitors say they neither agree nor disagree that they feel more tolerant towards others and other cultures as a result of their visit. However, the proportion who agree outweighs those who disagree by almost two to one (36% and 20% respectively).

There has been a slight increase since 2003 in the proportion of visitors who agree that museums are appealing places to browse and meet friends. This is particularly encouraging in the light of general public research⁴ which indicated that over the last five years, the proportion of non-visitors who say that their main barrier to visiting is a lack of time, has increased from 6% to 32%.

⁴ MORI (2004) *Visitors to Museums and Galleries 2004*. London: MLA

Reasons for Visiting

A general interest in the subject of the museum is the one outstanding reason for visiting, mentioned by 35% of visitors. (This is exactly the same proportion who mentioned this as the reason why they made their last museum visit in the general public Omnibus research⁵ in early 2004.)

Wanting to take the children (21%) and the children wanting to come (18%) are also strong motivators to visiting. The fieldwork period (during the half term holidays) probably had a small amount of impact on this, as in the Omnibus survey mentioned above, the proportions mentioning the same reasons for visiting were 18% and 17% respectively.

Museum Visiting

Three in five visitors say that they have not been to the museum where they were interviewed in the preceding 12 months. Among repeat visitors, though, there is a high level of returns, with these visitors averaging 4.7 visits per person over the course of the last year to the site where they were interviewed. One in five visitors are making only their first museum trip in the course of the last year.

The average number of museum visits has increased quite significantly since 2003, rising from 5.0 to 6.4 per visitor⁶.

Visitor Profiles

There has been a slight shift in the party profile this year, with more visitor parties containing children (up from 42% to 46%). The vast majority of these children (88%) are of school age, and 17% of these groups say that the visit was influenced by the child coming with school and wanting to return. This equates to 7% of all visit parties (although, again, the timing of the fieldwork should be noted before extrapolating this figure).

As before, there is a good spread of visitors in terms of their place of residence. Over one-third (36%) come from the local town, while three in ten come from elsewhere in the region and exactly the same proportion from elsewhere in the UK. Despite a growth in the number of overseas visits to the UK during 2004 (up by c12% year on year⁷), the proportion – and therefore number - of overseas visitors to regional museums remains unchanged.

Compared to the UK general public, there are proportionally more women, people aged 35-54, people from social classes A & B (ABs), people of white ethnic origin, and degree holders among the museum visiting population. If anything, there has been a slight shift towards higher social classes over the course of the last 12 months.

⁵ *ibid.*

⁶ These figures represent the average number of visits to any museum or art gallery.

⁷ Source: International Passenger Survey, Office for National Statistics

Six per cent of visitors say they suffer some form of illness, disability or other health problem which limits their daily activities.

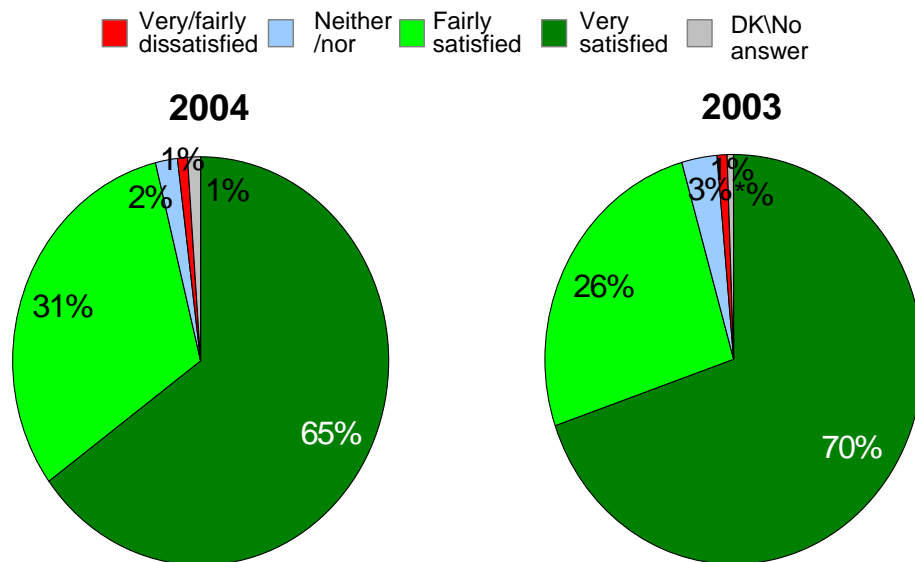
Main Findings

Museum Visit Satisfaction

Two in three (65%) visitors to regional museums and galleries describe themselves as 'very satisfied' with their visit. With a further 31% saying they are 'fairly satisfied', this means that very few visitors leave feeling dissatisfied. Since 2003, there appears to have been a slight slip in satisfaction ratings, however, with the proportion describing themselves as 'very satisfied' falling from 70%.

Visitor Satisfaction

Q6. *How satisfied or dissatisfied were you with your overall visit today?*



Base: All visitors; 2004 (16,741), 2003 (17,578)

Women (67%), those aged 55 or over (72%), and people of white ethnic origin (66%) are more likely than others to describe themselves as 'very satisfied' with their visit. Unlike 2003, there are no significant differences between those visiting with or without children, and visitors of different social classes. Those visiting their first museum in the year are also no more or less likely to be 'very satisfied' with their visit. There is a strong correlation between visit satisfaction and overall enjoyment; 84% of those who strongly agree that they had an enjoyable visit say they were 'very satisfied'.

Visitors to museums in the South East (74%) and North East and (73%) record the highest satisfaction ratings, while the East Midlands (53%) is lowest. In fact, it is in the East Midlands and, particularly, London where the most significant falls in ratings since 2003 have been recorded, while in the North West and Yorkshire, the proportion describing themselves as 'very satisfied' has increased.

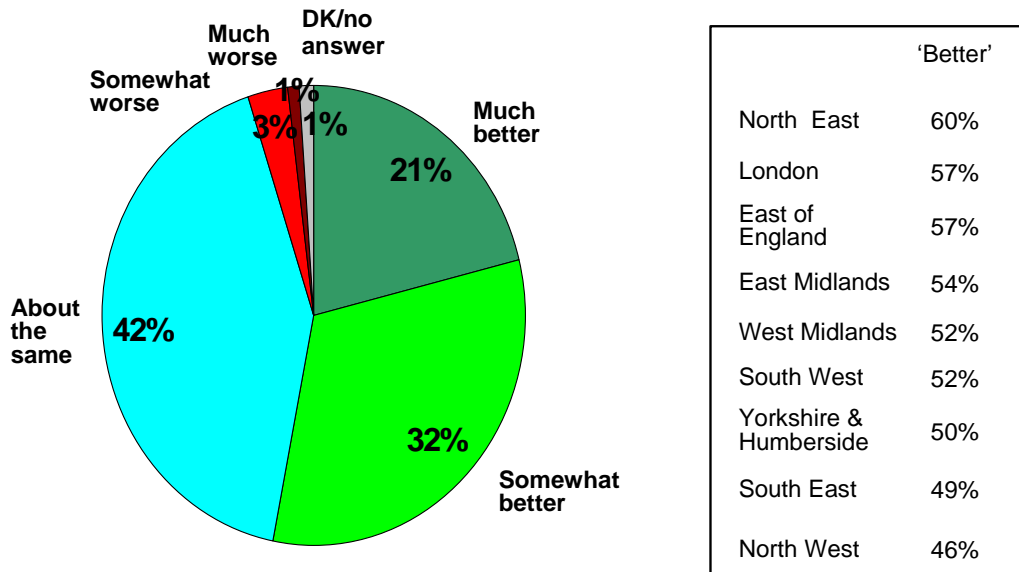
	Overall satisfaction – by region	
	2004 %	“Very satisfied” 2003 %
All England	65	70
South East	74	76
North East	73	76
South West	68	73
East of England	64	67
West Midlands	63	75
North West	63	60
London	61	81
Yorkshire	60	57
East Midlands	53	65
Base: 17,578 (2003); 16,741 (2004)		
Source: MORI		

Meeting Expectations

More than half of all visitors (53%) say that their visit was better than they expected, with 21% saying it was ‘much better’. Two in five say that their visit to the museum was about the same as they expected, while just 4% say it was worse (1% ‘much worse’). Those most likely to feel that their visit was ‘much better’ include C2DEs (25%), BMEs (26%), those who left education with either GCSEs or no formal qualifications (25%), and people visiting the museum from other parts of the country or from overseas (26% and 27% respectively – although this may well be linked to lack of previous experience of the museum). Three in five first time visitors (63%) say the museum is better than expected (26% ‘much better’), but it is encouraging to see that 12% of repeat visitors also feel that their visit was significantly better than they had expected, underlining museums’ ability to continue to delight, educate and entertain. Interestingly, 31% of those on their first visit to any museum in the last 12 months say their visit was ‘much better than expected’, which demonstrates that museums have something to offer to virtually everyone – if they can just somehow persuade them through the front door.

Visitor Expectations

Q8. How do you feel about your overall visit here today compared with your expectations?



Base: All Visitors (16,741)

Although the North West has improved since last year in sending visitors home satisfied (from 60% to 63% 'very satisfied'), it is some way behind the other regions in providing experiences that were better than expected. Just 16% of visitors to North West museums feel that the experience is 'much better' than they had anticipated.

Frontiers Analysis

Based on our understanding of how different groups tend to respond with regard to overall satisfaction, we can compare how individual museums fare, in the light of their visitor profile. By undertaking this 'Frontiers Analysis' (see Appendices for details of how this is conducted), we have established that there are just three demographic factors that have a significant impact on the way that people tend to rate satisfaction. These are being educated to degree level (positive impact), being aged 16-24, or being of Black or Minority Ethnic background (both negative impacts).

Using this information at an individual level, we can recalculate an 'expected' satisfaction score for each museum, then compare how it fares in reality. The chart below is based on all those visiting each site from within the same town, in order to analyse performance among the local, core audience. The bars show the overall satisfaction score we might expect to see, given the profile of visitors. The column on the right shows the satisfaction score that was actually achieved (among local residents), while the column on the left shows the gap between these two scores. The order of the chart goes from the museum which is performing best in relation to expectations (the Newcastle Discovery Museum) down to the

worst (the Harris Art Gallery). (N.B. Two sites are missing from this chart, as the numbers of local visitors were not sufficient for the analysis to be run.)

Satisfaction – Compared to Expectations

	Expected satisfaction	Overall satisfaction	Gap
Discovery Museum, Newcastle	87%	95%	7.8%
York Castle Museum	90%	96%	6.3%
Wolverhampton Art Gallery	86%	92%	6.1%
Birmingham Museum & Art Gallery	83%	87%	4.3%
The Geffrye	89%	93%	4.2%
Sunderland Museum and Art Gallery	88%	92%	3.7%
The Whitworth Art Gallery	87%	91%	3.6%
Russell-Coates Art Gallery	92%	95%	2.7%
Derby City Museum and Art Gallery	87%	89%	2.1%
Colchester Castle Museum	91%	93%	2.0%
Albert Memorial Museum	92%	94%	1.9%
Manchester Art Gallery	90%	91%	1.6%
Luton Museum	87%	89%	1.4%
Blists Hill, Ironbridge Gorge Museum	92%	93%	1.3%
Milestones, Hampshire	90%	92%	1.1%
Norwich Castle Museum and Art Gallery	90%	91%	1.0%
London's Transport Museum	91%	92%	1.0%
City Museum and Art Gallery, Plymouth	91%	91%	0.6%
Tullie House, Carlisle	92%	92%	0.1%
The Manchester Museum	88%	88%	-0.1%
Fitzwilliam Museum	88%	88%	-0.3%
University Museum of Natural History/Pitt Rivers Museum	93%	92%	-0.7%
Beamish	91%	90%	-0.9%
Bolton Central Museum and Art Gallery	88%	87%	-1.0%
Ashmolean Museum	93%	92%	-1.2%
Brighton Museum and Art Gallery	92%	90%	-1.5%
Cartwright Hall	88%	87%	-1.5%
Ferens Art Gallery, Hull	89%	88%	-1.5%
Museum of Hartlepool	91%	89%	-1.8%
The Castle Museum, Nottingham	83%	81%	-1.9%
The Museum of London	90%	88%	-1.9%
Royal Cornwall Museum	90%	88%	-2.2%
Bowes Museum	94%	92%	-2.7%
The Millennium Galleries, Sheffield	90%	87%	-2.7%
Herbert Art Gallery	85%	82%	-3.1%
City Museum and Art Gallery, Bristol	91%	87%	-3.6%
The Horniman Museum	92%	88%	-3.7%
The Potteries Museum	88%	83%	-4.3%
New Walk Museum and Art Gallery	86%	82%	-4.3%
Leeds City Art Gallery	85%	81%	-4.8%
Harris Art Gallery	84%	77%	-6.8%

Base: All living in the same town as each museum/art gallery

The Visitor Experience

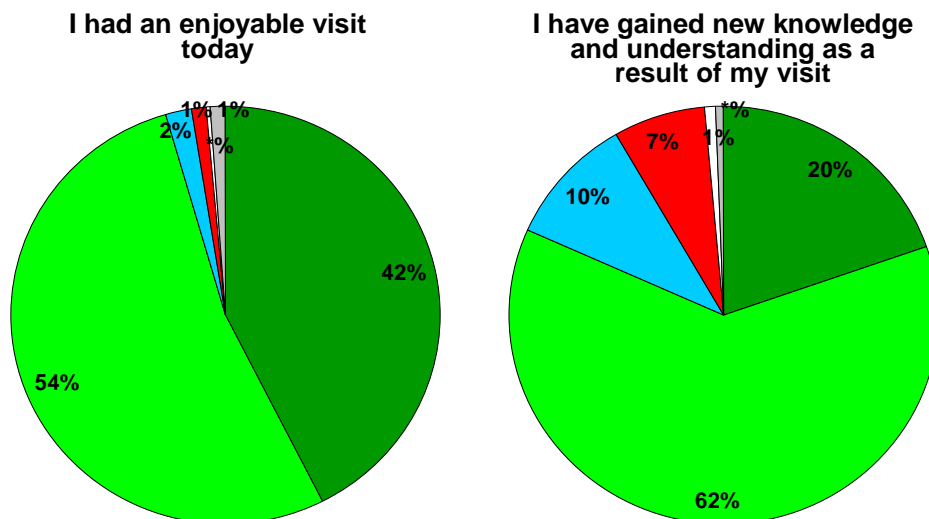
Enjoyment

A total of 97% of all visitors say that they have had an enjoyable experience at the museum (exactly the same figure as last year). More than two in five (43%), strongly agree that this is the case. Women (45%), those aged 55 or over (48%) and people from outside the UK (49%) are the groups most likely to agree strongly. Strongly linked to overall satisfaction, the South East museums achieve the highest levels of strong agreement (52% overall), while the East Midlands bring up the rear (33%). Overall, it appears that science museums and the open air parks tend to achieve higher enjoyment ratings, while art galleries are often a little lower than average.

Visitor Experience - I

Q5. To what extent do you agree or disagree with each of the following statements that I am about to read out?

■ Strongly agree
 ■ Agree
 ■ Neither/nor
 ■ Disagree
 Strongly disagree
 Don't know



Base: All Visitors (16,741)

Knowledge & Understanding

As well as enjoyment, the vast majority of visitors agree that they have gained new knowledge and understanding as a result of their visit. (At 82% the proportion of visitors who agree is just one percentage point down on 2003.) There is a great deal of similarity between sub-groups on this issue, including, for example, those with differing educational backgrounds, emphasising the fact that museums can provide insight at many different levels. While those on repeat visits are a little less likely than first time visitors to agree strongly with this statement (17% and 22% respectively), again it is encouraging to note that repeat visitors are able to take away new learning and knowledge from their visits. Museums in

the South East attract the highest levels of strong agreement (26%), while those in the North West and South West rank lowest (both 15%). As for enjoyment, art galleries tend to produce lower levels of agreement (with notable exceptions), while science centres and the open air attractions score highest.

Inspiration

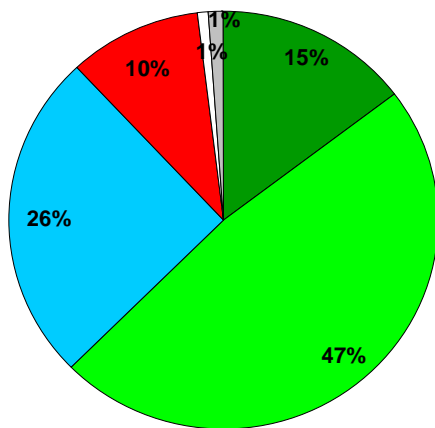
Almost two in three visitors (64%) leave museums feeling inspired (just down from the figure of 65% recorded in 2003.) Women, people visiting without children, and those aged 55 or over (all 17% 'strongly agree'), and BMEs (18%), are the groups who are most likely to strongly agree that this is the case. Inspiration strikes all age groups, all social classes, and people of all educational backgrounds at a similar rate, however. Visitors in the South East (22% 'strongly agree') are most likely to leave feeling inspired, while those in the East Midlands are least likely (11%). In this case, there do not appear to be any significant differences in response by type of museum or gallery.

Visitor Experience - II

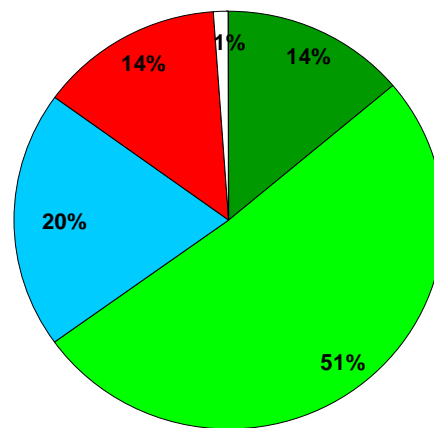
Q5. To what extent do you agree or disagree with each of the following statements that I am about to read out?

■ Strongly agree
 ■ Agree
 ■ Neither/nor
 ■ Disagree
 Strongly disagree
 Don't know

My visit today inspired me



I learned more than I had expected to



Base: All Visitors (16,741)

Learning

Two in three visitors (65%) agree that they learned more than they had expected to as a result of their visit, with 14% agreeing strongly. Those of Black origin (23%) and visitors from overseas (20%) are the most likely groups to agree strongly, as are first time museum visitors from C2DE or BME backgrounds (18% agree strongly, and 76% agree overall). Once again, however, museums can take a lot of heart from the fact that 10% of repeat visitors agree strongly that they have learned more than they

expected. The North East scores most highly on this factor (20% strong agreement), with the North West trailing behind (9%), although it should be noted that the North West group does contain significantly more art galleries than other areas, and once again it is the art galleries that tend to score lowest on this issue.

Motivation

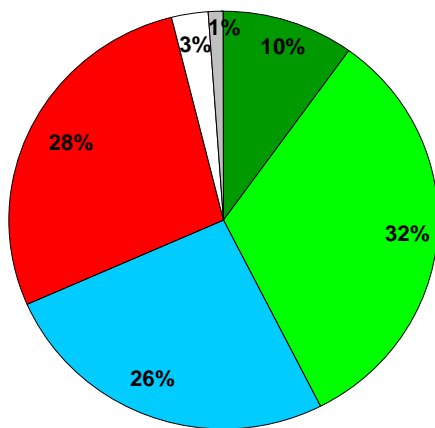
Two in five visitors (44%) say they feel motivated to do something related to what they have seen in the museum. (This is a little lower than the figure of 48% recorded last year.) Younger people (12% of those aged 16-34 'strongly agree'), BMEs, and those visiting from overseas (both 14%) are the groups most likely to agree strongly that they feel motivated to do something after visiting. First time visitors (from C2DE or non white backgrounds) are less likely than other visitors to feel motivated to do anything as a result of their visit, and are, in fact, more likely to disagree than agree with this statement. There is little difference between the hubs (only the South East, with 14% strong agreement stands out).

Visitor Experience - III

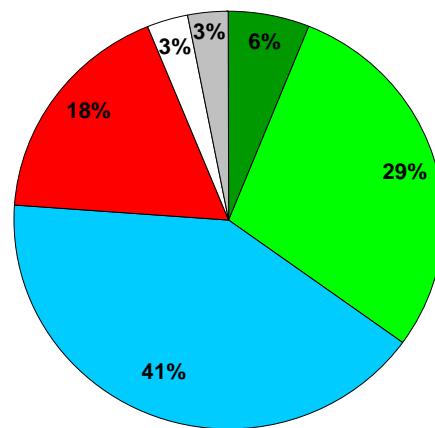
Q5. To what extent do you agree or disagree with each of the following statements that I am about to read out?

■ Strongly agree
 ■ Agree
 ■ Neither/nor
 ■ Disagree
 Strongly disagree
 Don't know

I feel motivated to do something related to what I have seen today



I feel more tolerant towards other people and other people's cultures and ideas following my visit today



Base: All Visitors (16,741)

Tolerance

In 2003, 45% of visitors agreed that they felt more tolerant towards other people and their cultures and ideas as a result of visiting a museum. This figure has fallen in 2004 to 36%, with just 7% agreeing strongly that this is the case. There are some very significant differences between sub groups on this issue. For example, those of non-white origin are a great deal more likely than people of white ethnic origin to agree (57% vs. 35%). C2DEs (47% agree), people without formal qualifications, or who

left school after GCSEs (45%) and those from overseas (45%) are the other groups most likely to feel that their visit has helped them to become more tolerant of others. (This is a similar situation to that recorded in 2003.) New visitors from C2DE or BME backgrounds are significantly more likely than others to agree with this statement; in total 49% feel more tolerant as a result of their visit. At a hub level, museums in the North East are most likely to leave visitors feeling more tolerant (44% agree), while those in London (32%) are least likely. As might be expected, given their subject matter, art galleries tend to be the least likely types of museum to generate a feeling of increased tolerance.

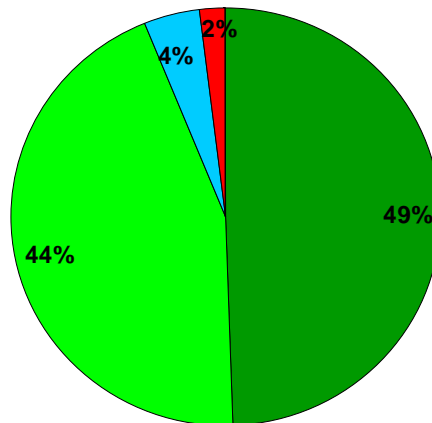
Attitudes towards Museums

Learning for Children

Attitudes Towards Museums & Galleries - I

Q7. Thinking about your visit here today, to what extent do you agree or disagree that this museum is the sort of place where children can learn things they usually don't in the classroom?

■ Strongly agree
 ■ Agree
 ■ Neither/nor
 ■ Disagree
 Strongly disagree



Base: All Visitors (16,741)

There is a strong level of agreement that museums are the sorts of places where children can learn things which they usually don't in the classroom. Half of all visitors (49%) "strongly agree" with this statement. Those with children in their party (54%) are more likely than those without (45%) to feel this way. This role for museums appears to be more valued by those who themselves have not had an extended education – 53% of visitors who left school with no more than GCSEs "strongly agree", compared to 47% of those with a degree. The type of museum clearly plays a significant role in determining the response to this question, with open air museums attracting the strongest levels of agreement, and art galleries and "classic" museums tending to score below average, which

presumably accounts for the fact that the North West hub trails a little behind the others in this category.

While this is clearly a strong endorsement of the role that museums can play in education, it is a little concerning to see that the proportion agreeing strongly has dropped from 53% in 2003 to 49% this year.

Imagination & Excitement

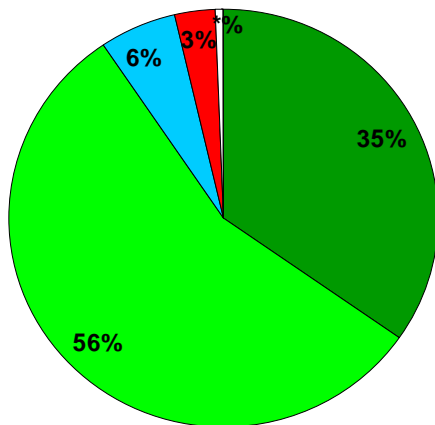
There has been little change, however, in the proportion of visitors who agree that “this museum is an imaginative and exciting place to visit”. In total 91% agree with this statement, which is the same as in 2003, although the proportion who “strongly agree” has fallen by two percentage points to 35%. Likelihood to “strongly agree” is highest among women (37%, vs. 34% of men), DEs (39%), and those aged 55 and over (41%). Interestingly, people visiting a museum in their local town are less likely than average to feel this way (32%, vs. 37% among all others visiting from further afield). Once again, the type of institution is significant, with science centres and open air attractions out-performing the others.

Attitudes Towards Museums & Galleries - II

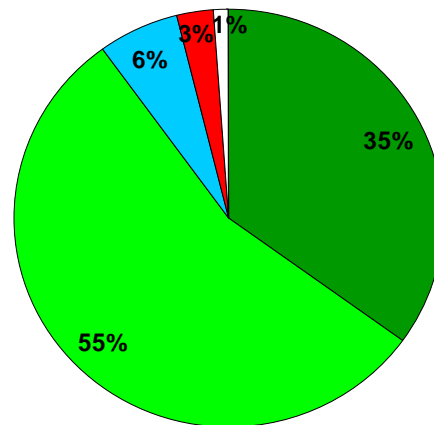
Q7. Thinking about your visit here today, to what extent do you agree or disagree with the following statements?

■ Strongly agree
 ■ Agree
 ■ Neither/nor
 ■ Disagree
 Strongly disagree

This museum is an imaginative and exciting place to visit



This museum/gallery displays its collections in a way that makes it easy for me to understand



Base: All Visitors (16,741)

Displaying Collections

Nine in ten visitors agree that the museum displays its collections in a way that makes it easy for them to understand. One in three (35%) “strongly agree”, although this has fallen significantly from 40% in 2003. Levels of agreement are fairly consistent across all visitor groups, although first time museum visitors (of C2DE or BME origin) are a little more likely than others to agree (95% agree, 37% ‘strongly’). There are, like last year,

significant differences between regions, with the North East (50% strongly agree) leading the way, and the North West and South West (both 27%) some way behind. The drop-off in scores has been most pronounced in London, the West and East Midlands. In contrast, the level of strong agreement has increased in the North East and remained stable in the North West.

Collection display – by region		
Q7 Thinking about your visit here today, to what extent do you agree or disagree that this museum displays its collections in a way that makes it easy for me to understand?		
	"Agree strongly"	
	2004 %	2003 %
All England	35	40
North East	50	46
London	38	56
Yorkshire	34	32
West Midlands	33	52
East Midlands	32	40
South East	32	38
East of England	30	40
South West	27	32
North West	27	27

Base: 17,578 (2003); 16,741 (2004)
Source: MORI

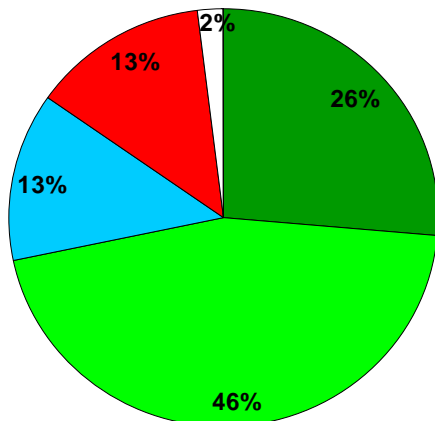
Understanding the Local Area and People

Attitudes Towards Museums & Galleries - III

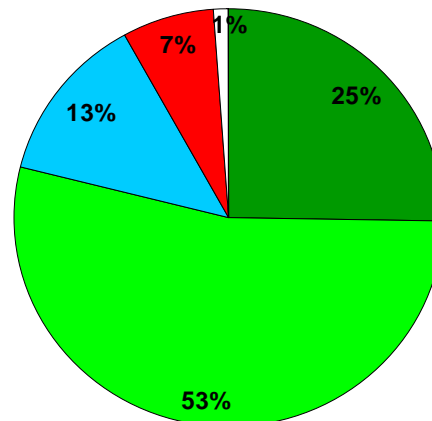
Q7. Thinking about your visit here today, to what extent do you agree or disagree with the following statements?

■ Strongly agree
 ■ Agree
 ■ Neither/nor
 ■ Disagree
 Strongly disagree

This museum/gallery helps me to understand more about the local area and its people



This museum/gallery is an appealing place to browse and meet friends



Base: All Visitors (16,741)

There has been a significant drop since 2003 in the proportion of visitors who “strongly agree” that “this museum helps me to understand more about the local area and its people”, from 31% to 26%. This should not, however, hide the fact that 71% of visitors do agree with this, compared to 15% who disagree. The level of strong agreement is highest among C2DEs (30%) and among people living outside of the local town (27% among those living elsewhere in the UK and 32% among those from overseas). First time visitors of C2DE or non-white origin are also more likely than others to agree (29% strongly agree and 80% agree overall). Once again, significant differences occur between hubs, although this is presumably driven by the type of establishments involved, with open air museums and science centres scoring well. There has been a significant fall on this factor for museums in the West Midlands, from 46% agreeing strongly in 2003 to 24% this year.

Understanding the local area and people – by region		
Q7 Thinking about your visit here today, to what extent do you agree or disagree that this museum helps me understand more about the local area and its people?		
	2004 %	“Agree strongly” 2003 %
All England	26	31
North East	48	45
London	25	33
East Midlands	25	31
West Midlands	24	46
East of England	24	32
South West	23	30
Yorkshire	22	23
South East	20	21
North West	19	18

Base: 17,578 (2003); 16,741 (2004)
Source: MORI

Meeting Friends

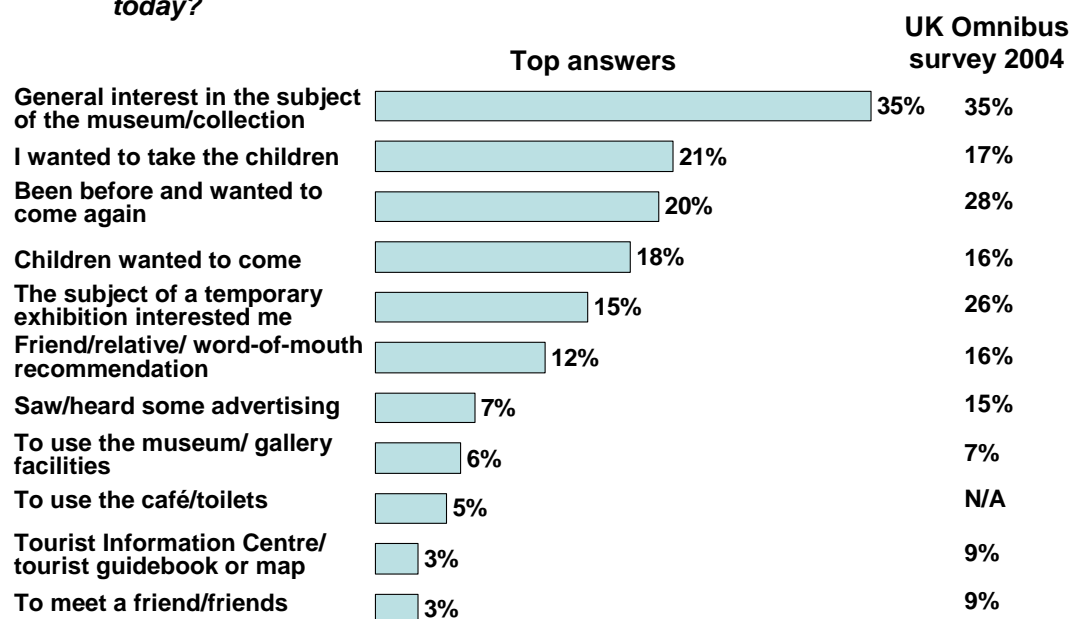
Four in five visitors (79%) believe that the museum is an appealing place to browse and meet friends. One in four (25%) “strongly agree” that this is the case. Women (27% “strongly agree”), those aged 55 and over (30%), and those of White ethnic origin (26%) are significantly more likely than others to strongly agree with this statement. Since 2003 there has been a slight increase in the proportion who agree that museums are good places to browse and meet friends (79% this year compared to 76% last year), although the proportion who agree strongly has dropped a little.

Reasons for Visiting

As in a piece of research among the British general public early in 2004⁸, the main reason for visiting regional museums is a general interest in the subject of the museum or collection, cited by 35%. This rises to 43% among those without children in their party, and falls to 26% among those with children, reflecting the differing priorities for leisure time among those who have children. The fieldwork period, during the half term holidays, perhaps accounts for the fact that wanting to take the children (21%) and the children wanting to come (18%) are both a little higher than recorded in the general public research. Conversely, 20% of regional museum visitors say they are visiting because they have been before and want to return, compared to a figure of 28% in the national research. Similarly, the proportions visiting because of a temporary exhibition (15% vs. 26%) or because of seeing some advertising (7% vs. 15%) are significantly lower.

Reasons for Visiting

Q4. What are the main reasons why you decided to visit this museum/ gallery today?



Base: All Visitors (16,741)

Reflecting visit patterns, women are more likely than men to mention their children as a motivating factor for their visit (as are those in the 35-54 age bracket). C2DE visitors are significantly more likely than ABC1s to say they are visiting because their children wanted to come (27% and 17% respectively). This pattern is repeated among those who left school with GCSEs or no qualifications, in comparison to those with degrees.

⁸ MORI (2004) *Visitors to Museums and Galleries 2004*. London: MLA

In every hub except the North East, the top reason for visiting is a general interest in the subject matter. There are, though, some significant differences in the other main reasons.

Main reasons for visiting – by region			
Q4 What were the main reasons why you decided to visit this museum today?			
	Top reason	Second reason	Third reason
All England	General interest in the subject 35%	Wanted to take the children 21%	Been before and wanted to come again 20%
West Midlands	General interest in the subject 44%	Been before and wanted to come again 23%	Temporary exhibition 20%
London	General interest in the subject 38%	Wanted to take the children 27%	Children wanted to come 21%
Yorkshire	General interest in the subject 39%	Been before and wanted to come again 27%	Friend/relative word of mouth recommendation 15%
North West	General interest in the subject 33%	Been before and wanted to come again 20%	Temporary exhibition 20%
South West	General interest in the subject 34%	Temporary exhibition 26%	Wanted to take the children 23%
East of England	General interest in the subject 32%	Wanted to take the children 22%	Been before and wanted to come again 18%
South East	General interest in the subject 37%	Temporary exhibition 15%	Been before and wanted to come again 15%
East Midlands	General interest in the subject 31%	Wanted to take the children 25%	Children wanted to come 22%
North East	Children wanted to come 27%	Wanted to take the children 26%	General interest in the subject 26%
Base: 16,741 (2004) Source: MORI			

Museum Visiting

For three in five visitors (60%), this is the first time that they have been to this particular museum in the last 12 months. This is down by one percentage point from 2003. Those who are most likely to be repeat visitors are aged 55 or over (44%), from social classes D and E (49%), and of Asian origin (46%). As might be expected, people living locally are decidedly more likely to be repeat visitors, with incidence dropping with distance from the museum.

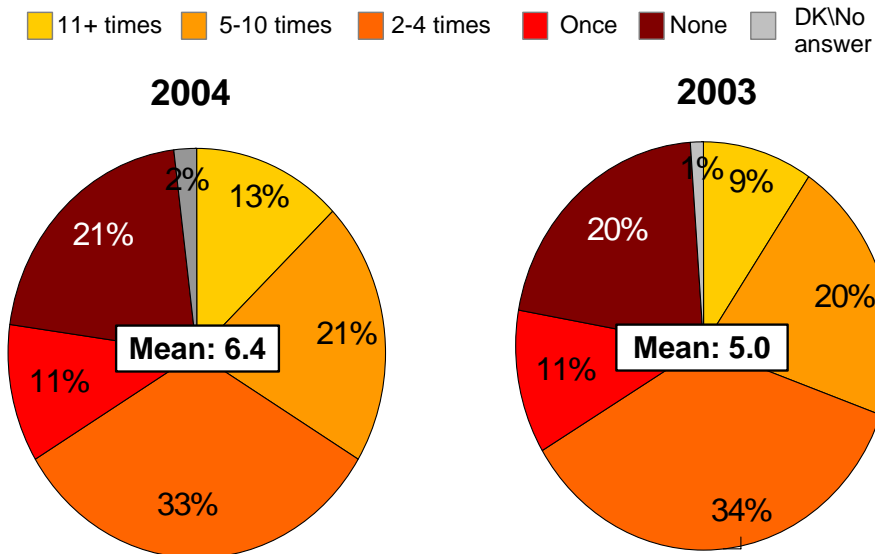
Repeating the pattern established last year, regionally, the highest levels of repeat visiting are in the North West (49%), while the lowest levels are in London (25%) and the East of England (27%). Overall, galleries tend to have a higher level of repeat visiting, while open air sites are significantly more likely to have to rely on finding new visitors.

Again, the number of repeat visits to each museum exactly matches that recorded in 2003, at 4.7 visits per person. On average, older people, DEs, and local residents tend to visit most frequently (means cores of 5.2, 5.4 and 5.3 respectively). Asian visitors are also more likely than average to be frequent returnees, averaging 5.1 visits per person in the last 12 months.

At the hub level, museums in the East Midlands now achieve the lowest average repeat visit levels (3.9), while this year the North West achieves the highest (5.2).

Visits to Other Museums

Q3 How many times have you been to any other museum/gallery in the last 12 months?



Base: All visitors; 2004 (16,741), 2003 (17,578)

When asked about visiting other museums and galleries, the pattern is quite similar to that established in 2003. One in five visitors (21%) have not been to any other museums in the last 12 months, while one in three have made at least five visits to other museums and galleries. The figure for very frequent museum visiting (11 or more visits in the last 12 months) has gone up from 9% to 13%, and as a consequence, the average number of visits per repeat visitor has increased somewhat to 6.4. In fact, 4% of those interviewed have been on 21 or more museum visits in the last 12 months.

While C2DEs are more likely than ABC1s to revisit the same museum during the course of a year, ABs, in particular, are significantly more likely to make frequent visits to other sites – the average number of visits to museums is 7.2, compared to 4.8 for C2DEs. Likelihood to visit other sites also rises with educational qualifications, with the average number of visits among those with GCSEs or no formal qualifications standing at 4.6, compared to 7.4 for those with a degree. People without children are more frequent visitors (average 7.3 visits, vs. 5.2).

Regionally, there are not huge differences. Despite the plethora of museums and galleries available in the Capital, the average number of visits for London museum goers is only just a little higher than the overall average. The highest number of visits goes to those in the South East (average 7.7), and the lowest in the North East (5.4). The highest scores tend to be recorded by those visiting pure art galleries (even higher than at institutions acting as both ‘Museum and Art Gallery’), while those interviewed at science centres and open air attractions tend to visit less museums and galleries than other people.

Frequency of Visits		
	This museum/ gallery in last 12 months	Other museum/ gallery in last 12 months
	(6,364)	(16,741)
	%	%
Once	17	11
Twice	20	13
Three times	16	11
Four times	11	9
Five – Ten times	19	21
More than ten times	14	13
None	N/A	21
<i>Source: MORI</i>		

Overall around one in five visitors (21%) are on their first museum visit in a 12 month period, while 5% of UK based visitors are on their first trip to any museum in the last year, and either from social classes C2DE or Black or Minority Ethnic background.

Visitor Profiles

Party Profiles

The average number of adults visiting museums together is around 2.6. This is evidently strongly affected by large visitor groups (coach parties?), as the most common adult party sizes are two (47%) or just one (37%). In total, just under half of all visitors (46%) come with at least one child – a fact which is no doubt affected by the timing of the research, during half term holidays. (In the Omnibus research in 2004⁹, 34% of adults said that on their last trip to a museum they were accompanied by their children or grandchildren.) As was the case last year, most of those visiting with children tend to bring either one (18%) or two (19%). However, the average number of children in visitor parties with at least one child is 2.0, so there are clearly some large groups. (In fact, 2% of all visitors bring 6 or more children to the museum with them.)

Women are more likely than men to visit museums in larger groups of adults (average adult party size 2.9 vs. 2.2), and they are also more likely to bring children (half of all groups vs. 42% of those led by men). 'Pure' art galleries tend to be less likely to attract visitor parties with children.

In terms of the overall party profile, almost one in five visitors (18%) come alone, while 26% come in groups of two adults and no children, and 9% visit in groups of three or more adults without children. Men (23%) are decidedly more likely than women (15%) to visit on their own. BMEs are also more likely than average to visit alone (24%). Those aged 35-54 are, perhaps not surprisingly, a lot more likely to be in parties with children (61%, vs. 35% of those aged 16-34 and 32% of those aged 55 or over). People in ABC1 social groups show a tendency to visit museums in adult couples, while it is more likely that C2DEs come to museums to bring their children along.

Party Composition		
	2004	2003
	(16,741)	(17,578)
	%	%
1 adult & no children	18	18
2 adults & no children	26	29
3+ adults & no children	9	10
1 adult & 1 or more children	19	16
2 adults & 1 or more children	21	18
3+ adults & 1 or more children	7	8

Source: MORI

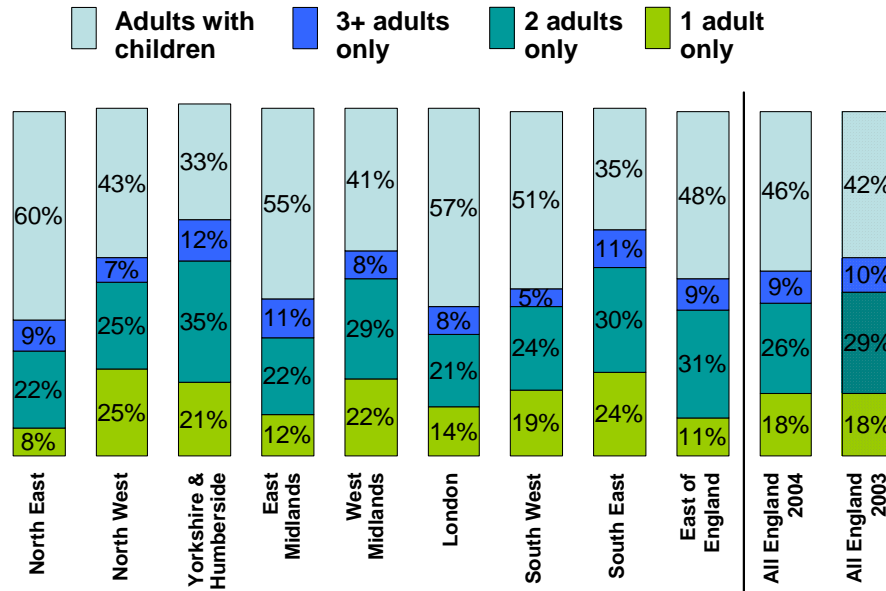
There are, of course, significant differences in party composition by region, with museums in the North East and East Midlands attracting the

⁹ MORI (2004) *Visitors to Museums and Galleries 2004*. London: MLA

largest proportion of visitors with children, and the North West attracting the highest proportion of single adults.

Party Composition

Q9. Including yourself how many adults/ children do you have in your party?



Base: All Visitors (16,741)

Children

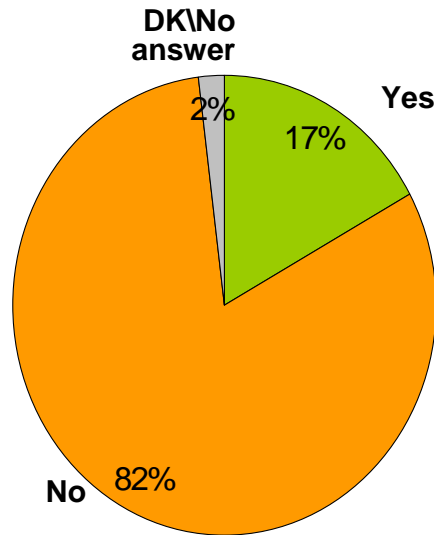
Among those groups visiting with children, the vast majority (88%) are of school age. This equates to around 40% of all visit parties containing school age children. This shows little change from 2003. This figure is highest in the West Midlands (94%) and lowest in London (81%).

As in 2003, the proportion of those with children of school age, who are visiting because a child has come to the museum with school and want to return, is around one in six (17%). This equates to 7% of all visitor parties. The proportion visiting because children have been with school and wanted to return is significantly higher among C2DEs (21%), those leaving school with GCSEs or no formal qualifications (21%), and BMEs (28%). The East of England racks up the highest regional proportion (24%), with London achieving the lowest score (12%).

It is not possible to determine whether low individual figures on this score represent low numbers of school visits, or few children being inspired to bring their families back after a school visit. However, the 'pure' art galleries again tend to achieve lower ratings for children having visited and wanting to return.

Impact of School Visits

Q11. Are you here today because one or more of these children have visited this museum/gallery before on a school trip and wanted to come back?



	Yes
East of England	24%
East Midlands	22%
South West	19%
North East	17%
North West	17%
South East	16%
West Midlands	15%
Yorkshire & Humberside	13%
London	12%

Base: All Visitors with children of school age (6,834)

Place of Residence

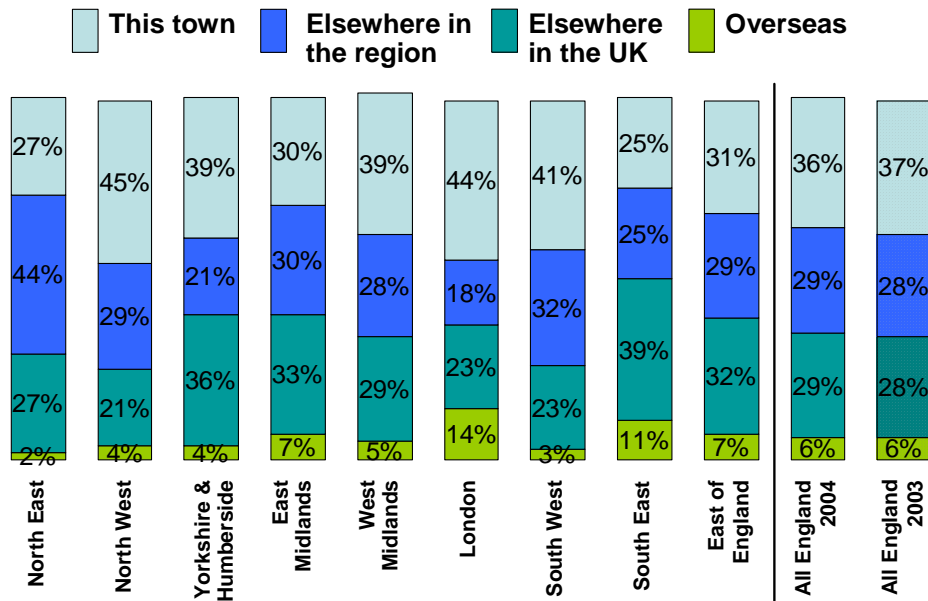
The profile of visitors' places of residence has not shifted a great deal over the course of the last year. One in three (36%) continue to come from the local town (37% in 2003), while 29% come from elsewhere in the region and 29% from elsewhere in the UK (both 28% in 2003). Despite evidence that increased numbers of overseas visitors came to the UK in 2004¹⁰, the proportion of museum and gallery visitors from overseas has remained at 6%. (This does not take into account, however, the fact that the overall visit numbers at the participating museums and galleries increased, on average, by 7% over this period¹¹, so while the proportions are the same, this reflects larger actual numbers of visits.)

¹⁰ Source: International Passenger Survey, Office for National Statistics

¹¹ Source: MLA figures

Place of Residence

Q12. What is your permanent place of residence?



Base: All Visitors (16,741)

There are some significant differences in the profile between various groups of visitors. Young people (aged 16-34), for example, are particularly likely to be visiting from the local town (46%), as are those from social classes D and E (48%), and people visiting with children (41%). Those of non-white ethnic origin are even more likely to be visiting a local museum (57%). Not surprisingly, while 57% of repeat visitors live in the local town, this falls to 23% of first timers, of whom 41% live elsewhere in the UK.

Regionally, the North West museums attract the highest proportion of local visitors (45%), although the top scoring individual museum is in Luton, where 79% of visitors come from the local town. The South East, on the other hand, scores the lowest (25%). London museums will be pleased that a fairly high proportion of visitors are from overseas (14%, down from 17% in 2003), showing that all museums in the Capital, not just the major Nationals, are attractive to those visiting from abroad.

Visitor Demographics

Gender

As was the case in 2003, women make up a higher proportion of museum visitors than men (56% vs. 43%). The balance is virtually identical to last year. Male visitors are a little more likely to be older, and to be educated beyond GCSE level. Among those who visit without children, the sexes are more evenly split (47% men vs. 53% women), whereas in parties with children women outnumber men by a factor of three to two. The North

East attracts the most closely balanced gender split (48% men vs. 52% women), while the South East is most dominated by women (61% women vs. 39% men).

Age

Overall, the age profile of visitors is very similar to that in 2003. There does appear, though, to have been a very slight overall increase in the average age from 44 to 45. The slight drop-off in the proportions of people aged 16-24 is more concerning when it is considered that they are under-represented in relation to the national profile (11% of museum visitors vs. 14% of the adult population). Male and female visitors have a very similar age profile, with the average age of male visitors slightly higher. The social class profile is presumably significantly affected by students, with 14% of all C1 visitors being aged 18-24, compared to 5% of all other social groups.

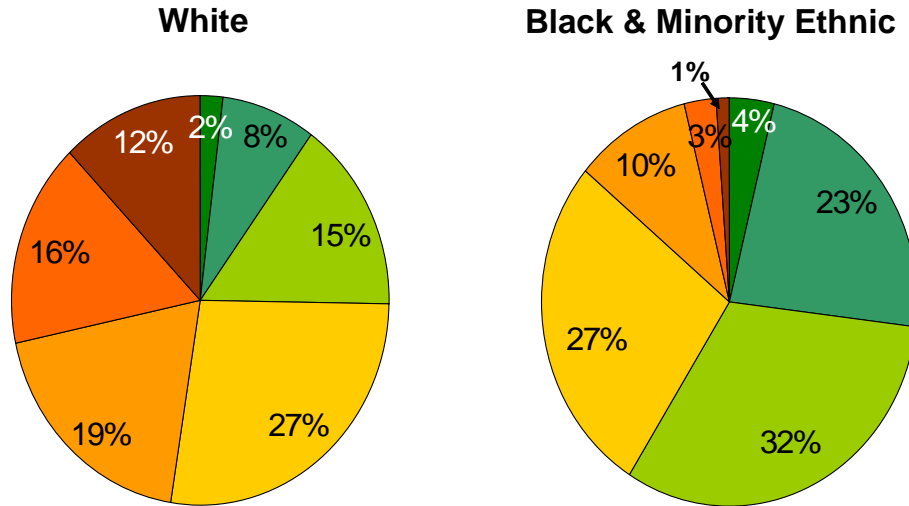
Age Breakdown			
	2004	2003	England population*
	(16,741)	(17,578)	
	%	%	%
16-17	2	3	3
18-24	9	9	11
25-34	16	15	17
35-44	27	26	19
45-54	19	19	16
55-64	16	16	14
65+	12	11	20

* Based on 2003 'Population Trends' figures from the Office for National Statistics
Source: MORI

Perhaps the most significant difference between groups, however, concerns ethnicity. While among people of white ethnic origin, those aged 34 or under make up one in four visitors to museums, this rises to 58% of those from Black and Minority Ethnic groups. This perhaps indicates that we might, in the future, expect to see increased use of museums and galleries by people from BME groups, as this age cohort grows older.

Visitor Age Profile – By Ethnicity

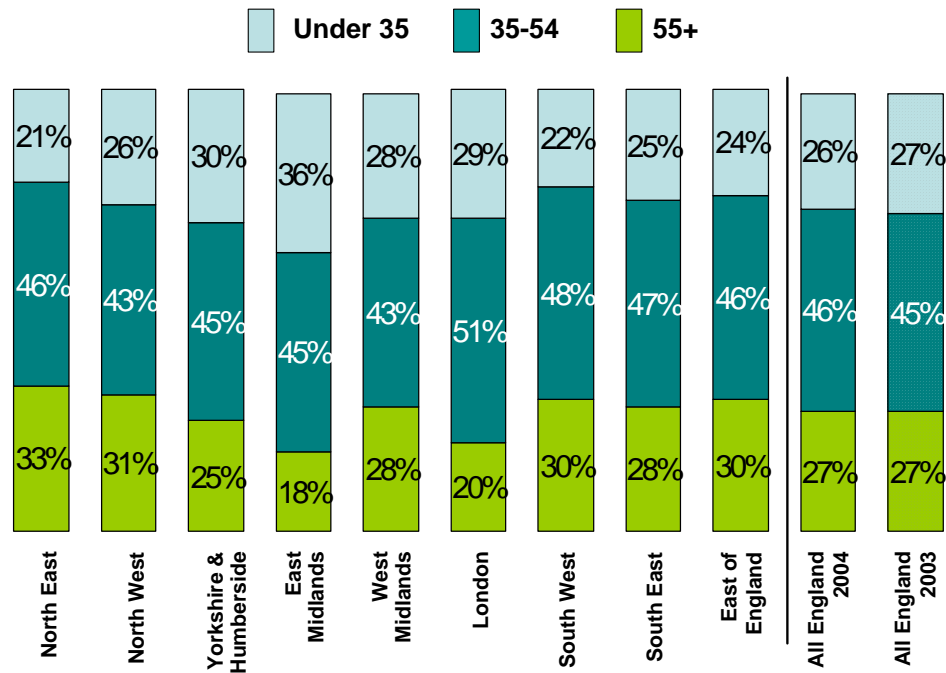
■ 16-17 ■ 18-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-64 ■ 65+



Base: All visitors (White: 15,698; BME: 699)

Regionally, there are some significant differences in the age profile of visitors. Museums in the East Midlands attract the highest proportions of younger visitors (aged 16-34 – 36%), compared to the North East, where just 21% fall into this age group. The North West has seen a shift away from visitors in the younger age group (30% in 2003 to 26% this year), as has the South West (26% to 22%).

Visitor Age Profile – By Region



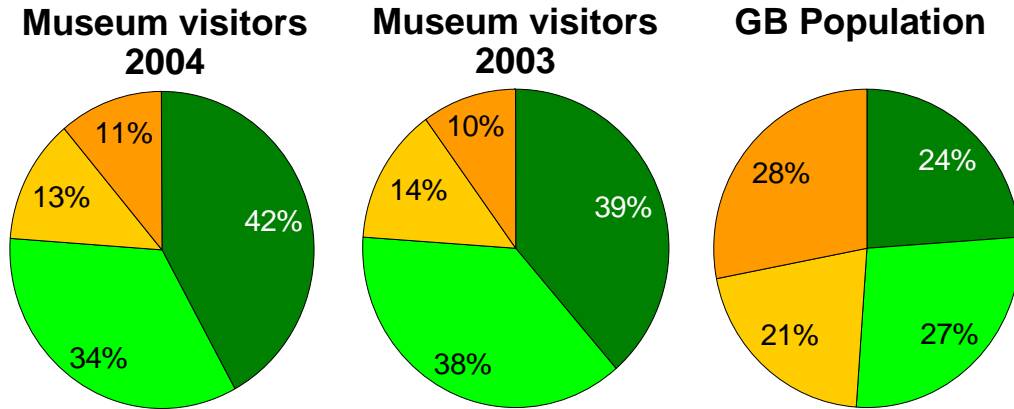
Base: All Visitors (16,741)

Social Class

As in 2003, compared to the British population, museum and gallery visiting remains dominated by those of 'higher' social classes. In fact, the proportion of visitors from social groups A and B has risen this year from 39% to 42%. The proportion of C2DEs has remained fairly stable, whilst C1s have slipped back. However, when comparing the regional museums with the national sites that form the vast majority of MORI's normative database, the proportion of ABs remains significantly lower (41% and 48% respectively).

Social Class - Trends

■ AB ■ C1 ■ C2 ■ DE

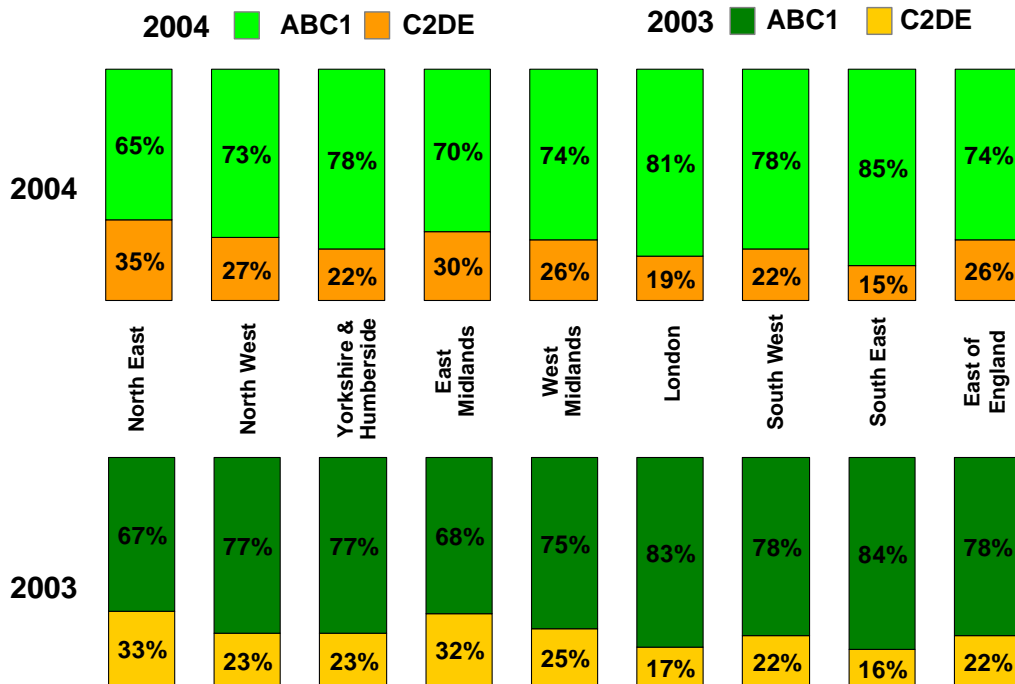


Base: All UK residents answering; 2004 (15,686), 2003 (14,534)

People visiting without children are decidedly more likely to be from social groups ABC1, perhaps indicating that C2DEs are more likely to regard museums as somewhere they bring their children, to help them gain a better education. Interestingly, the social class profile of first time and repeat visitors is fairly similar. However, among those visiting their first museum in a year, the proportion of C2DEs rises to 40%.

Regionally, unlike 2003, visitors in the South East are the most likely to be from ABC1 backgrounds (85%), whilst museums and galleries in the North East attract the highest proportions of C2DEs.

Social class



Base: All Visitors (16,741)

Ethnicity

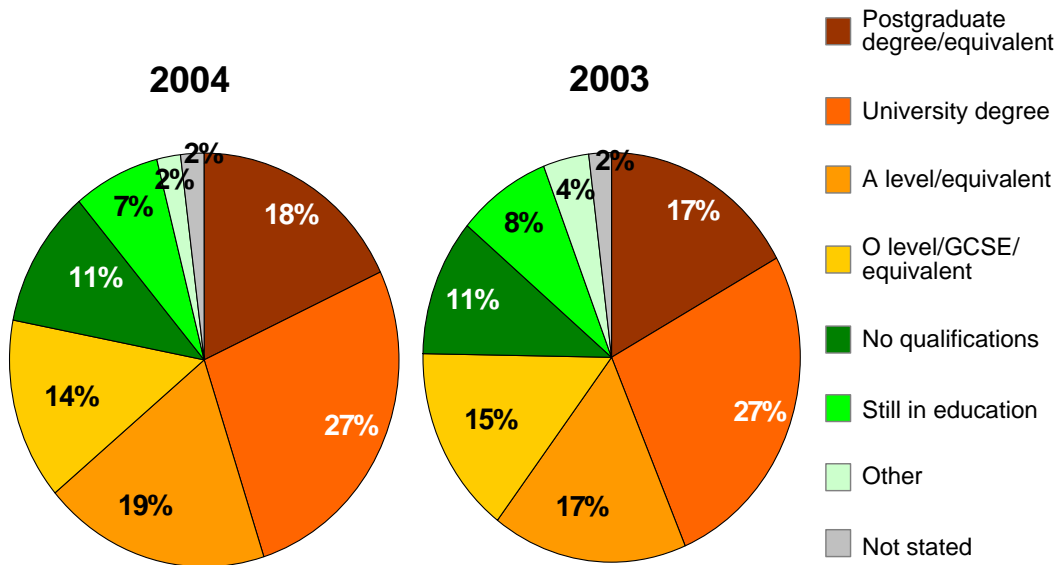
As was the case in 2003, 96% of all UK-based visitors to regional museums and galleries are of white ethnic origin, including 91% who describe themselves as 'White UK'. This remains significantly higher than the proportion of people of white ethnic origin within the English population at large (91% in the 2001 Census). No other single group makes up more than 1% of visitors. As might be expected, given the profile of the population, London museums attract the highest proportion of visitors of Black and Minority Ethnic origin, but even here this is just 7% (the same as in 2003), compared to 29% of the London population in 2001. Among those aged 16-34, the proportion of people of white ethnic origin in museums drops a little to 90%.

Educational Qualifications

Just under half of all visitors to regional museums and galleries hold some form of University degree, whether postgraduate (18%) or undergraduate (27%). (Among the wider population, 19% hold a degree.) One in five visitors (19%) left school after completing A levels or an equivalent qualification, whilst 14% attained GCSEs, O levels, or a similar qualification. Seven per cent of adult visitors to museums are still in education. This has not changed significantly since 2003.

Educational Qualifications

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



Base: All visitors; 2004 (16,741), 2003 (17,578)

Just 6% of those aged under 55 left school with no qualifications, but this rises to 24% of visitors aged 55+. While this older group are almost as likely as younger visitors to have attained an undergraduate degree, they are significantly less likely than those in the 35-54 age bracket to have a postgraduate degree. One in five visitors aged 16-34 (22%) are still in education. There is, of course, a strong correlation between social class and educational attainments: 77% of AB visitors have a degree, compared to just 8% of DEs. While those of white, Asian and 'other' ethnic backgrounds have very similar educational backgrounds, those of Black origin are more likely to have left school after GCSEs or O levels. Interestingly, though, the proportions of visitors from non-white backgrounds who are still in education are significantly higher than for people of white ethnic origin (21% of BME visitors compared to 6% of people of white ethnic origin). This might indicate a growing proportion of non-white visitors making use of their local museums as time goes by.

As was the case in 2003, visitors in London and the South East are more likely than average to have completed a university education, while those in the North East are significantly more likely than elsewhere to have left school with no qualifications, or with just O levels or GCSEs. Museums in the East Midlands (10%), Yorkshire and South East (both 9%) all attract significantly higher proportions of current students.

There are, of course, significant variations at a site level, with the Ashmolean attracting the most educated visitor profile – almost two in three have a degree, including 34% with a postgraduate degree. At the other end of the spectrum, at both the Sunderland Museum and Art

Gallery and the Potteries Museum, 29% of visitors have no qualifications at all.

Disabilities

Six per cent of visitors to museums and galleries consider themselves to have some form of disability, long term illness or health problem that limits their daily activities. This is clearly age related, with 11% of those aged 55 or over agreeing that this is the case. It also rises to 15% of DEs. (Presumably this is linked, with a significant proportion of those in the 'E' social group likely to be pensioners on solely a state pension.) Regionally, this varies from 9% in the North East to 2% in London. (The 2001 Census recorded that 18% of the English population suffered from a limiting long-term illness.)

Implications

The overall survey findings have changed very little since 2003. In many ways it is to be expected that the profile of visitors will have remained very similar, as it will take a lot longer than this to change cultural attitudes towards museum going, and encourage non visitors to come through the doors.

This, though, should not detract from the fact that the overall scores are extremely positive. Ninety-six per cent of visitors leave 'satisfied' with their experience (65% 'very satisfied'), and more than half say the visit was better than they expected. This includes 37% of repeat visitors, 78% of whom also agreed that they gained new knowledge and understanding as a result of their visit. Clearly museums and galleries are finding ways to ensure that people have new experiences, however many times they return. It is, though, perhaps a little disappointing that on some of the outcome measures, visitors in 2004 are a little less likely to strongly agree that their visit has impacted upon them.

In the second year of Renaissance, it remains unclear whether the Phase One hubs are performing significantly better than those who have yet to receive funding through the Renaissance scheme. In many ways, the North East region does stand out, particularly with regard to the profile of visitors (e.g. attracting more C2DEs and people with no educational qualifications). It is difficult, though, to state categorically that this is because of Renaissance policies, when the regional population profile differs from that of other regions (e.g. a higher than average proportion of DEs and lower C1s), as does the range of participating museums and galleries.

One emerging trend is a more representative ethnic breakdown of museum visitors in the younger age groups. Whereas 86% of all visitors describe themselves as being of 'White UK' origin, this falls to 73% among those aged 16-34. A significant proportion of younger BME museum visitors are students, so greater access to higher education does appear to be creating the right environment for, and even encouraging, a broader museum-going population. What we do not yet know is whether this exposure to museums at a younger age will lead to visitors of BME origin making more use of these institutions as they get older. The Frontiers Analysis indicates that this group is a little less likely than average to describe themselves as satisfied with their visit, and there is an obvious link between satisfaction and repeat visiting. There remains a challenge, therefore, to encourage non-traditional visitor groups through the door when they are away from an academic environment.

The Frontiers Analysis also shows that as well as ethnicity, visitors aged 16-24 are a little less likely to describe themselves as satisfied with a visit. On the other hand, those educated to degree level (a traditional core museum-going audience) are generally more likely to be satisfied. The underlying implication is that if museums want to improve overall

satisfaction scores, they need to continue to try to do more to appeal to younger people and those of non-white ethnic origin.

Overall, 6% of all visitors are on their first visit to a museum in the last 12 months, and from either a C2DE or Black and Minority Ethnic background. The first time visitors are just as likely as others to find their visit enjoyable and to feel inspired by their visit. As might be expected, they are more likely than frequent museum visitors to say they learned more than they expected. It is interesting to note, though, that they are significantly more likely than others to come away feeling more tolerant towards other people and cultures. Although they are enjoying their visits, however, first time visitors tend to be less likely to go away feeling motivated to do something as a result of their visit.

More than half of all visitors say that their visit was better than they had expected it to be. There is a strong implication, therefore, that those who do not tend to visit museums and galleries (currently more than three in five of the UK population, or 30 million people) might well be pleasantly surprised if they could somehow be persuaded through the doors.

Six per cent of visitors say they suffer some form of illness, disability or other health problem which limits their daily activities. In our general public research, 11% of non visitors (c.3 million people) say that the main reason they do not go to museums is that they find it difficult to get there, or get around for health reasons. This appears to indicate that there is scope for museums to do more to encourage those suffering from health problems to benefit from their facilities.

© MORI/22576

*Andy Martin
Jen Fraser
Neil Happs*

Appendices

Participating Museums & Galleries

	Target interviews	Interviews achieved	Weighted total*
North East			
Discovery Museum, Newcastle	880	525	742
Sunderland Museum and Winter Gardens	910	617	616
North of England Open Air Museum (Beamish)	600	360	634
Bowes Museum, County Durham	520	561	223
Museum of Hartlepool	520	472	300
North West			
Manchester Art Gallery	960	604	613
The Whitworth Art Gallery, Manchester	660	403	171
The Manchester Museum	880	392	280
Tullie House Museum and Art Gallery, Carlisle	330	267	516
Harris Museum and Art Gallery, Preston	660	380	291
Bolton Central Museum and Art Gallery	360	431	581
Yorkshire			
The Millennium Galleries, Sheffield	780	474	817
Cartwright Hall, Bradford	200	174	171
Ferens Art Gallery, Hull	546	485	196
York Castle Museum and York City Art Gallery	780	664	484
Leeds City Art Gallery	660	508	482
West Midlands			
Birmingham Museum & Art Gallery	1,320	410	1078
The Potteries Museum & Art Gallery, Stoke on Trent	660	403	321
Blists Hill (Ironbridge Gorge Museums Trust), Telford	780	609	377
Herbert Art Gallery & Museum, Coventry	220	205	121
Wolverhampton Art Gallery	360	393	286
East Midlands			
Derby Museum and Art Gallery	273	233	152
New Walk Museum and Art Gallery, Leicester	696	356	251
The Castle Museum, Nottingham	780	401	583
Snibston Discovery Park, Coalville	325	187	229

	Target interviews	Interviews achieved	Weighted total*
East of England			
Fitzwilliam Museum, Cambridge	496	353	263
Norwich Castle Museum and Art Gallery	546	442	298
Luton Museum	200	221	129
Colchester Castle Museum	260	277	201
South East			
Chatham Historic Dock Yard	225	207	189
Ashmolean Museum, Oxford	248	314	817
University Museum of Natural History/Pitt Rivers Museum, Oxford	260	253	325
Milestones, Hampshire	480	383	162
Brighton Museum and Art Gallery	600	386	474
South West			
City Museum and Art Gallery, Bristol	780	536	477
Royal Albert Memorial Museum, Exeter	360	444	392
Royal Cornwall Museum, Truro	200	218	209
City Museum and Art Gallery, Plymouth	200	228	126
Russell-Coates Art Gallery and Museum, Bournemouth	240	261	182
London			
London's Transport Museum	780	624	479
The Horniman Museum, London	346	275	583
The Geffrye Museum, London	200	268	169
The Museum of London	910	537	753
Total	22,991	16,741	16,741

* Weights are calculated to reflect actual visit numbers at each museum over the course of 12 calendar months during which the fieldwork took place. These visitor numbers were supplied by the museums themselves to the MLA. By adjusting the figures to reflect overall visit numbers, this allows us to make meaningful comparisons from year to year. This has meant that figures for 2003 reported in this document may have changed slightly from the 2003 report, when only unweighted data were used.

Frontiers Analysis Explained

This note discusses the methodology and the findings of the Frontiers Analysis featured on pages 8-9 of the report. The aim was to look at and compare the mean scores on overall satisfaction for each museum. It was believed, though, that these ratings were very much dependent on the local population and the profile of local visitors. In theory, museums in deprived areas where the local population are less well educated could have a greater level of challenge to reach the same level of satisfaction as compared to those with a “more appreciative” population. This type of “Frontiers” Analysis sets “benchmark” satisfaction scores specifically for each museum, dependent on the profile of visitors **who have come from the same town**.

The first stage involved creating an aggregated database where each record was a museum (rather than a single visitor), where the mean satisfaction score was recorded, along with the following profiling variables of local visitor demographics, i.e.:

- Party composition (no. adults and children);
- Gender;
- Age of respondent;
- Social Class;
- Education level;
- Has limiting long term illness;
- Ethnicity;
- Ethnic mix of local ward;
- Index of Multiple Deprivation for area.

The satisfaction score for each museum was calculated by taking the mean satisfaction score across all local visitors and rescaling them to a 0% - 100% range. For example, if every visitor was “fairly satisfied” overall, then that would yield a score of 75%. If all visitors were “very dissatisfied”, then that would yield 0%. An example of the calculation is set out below:

Visitors Living in the same town			
Base (35)			
Very satisfied	30	x100%	3000%
Fairly satisfied	5	x75%	375%
Neither/Nor	0	x50%	0
Fairly dissatisfied	0	x25%	0
Very dissatisfied	0	x0%	0

The new satisfaction score is calculated by dividing the total percentage score (3,375) by the base (35): $3,375 \div 35 = 96\%$

A Multiple Regression Analysis was carried out to see which subset of profiling variables (listed above) had a significant effect on the satisfaction scores. It was found that three of them did, which between them, explained 43% of the total variance in satisfaction score. The model is as follows:

			n =	% explained
Dependent Variable:		Std		
Satisfaction	Raw - B	Beta	40	43%
(Constant)	0.892			
p_16-24 years	-0.358	-0.575	0.416	-42%
p_Degree educated	0.122	0.478	0.346	35%
p_Black Minority Ethnic group	-0.294	-0.329	0.238	-24%

The Predicted/Benchmark Satisfaction Score that one would expect each museum to achieve based on the profile of its visitors could then be calculated from the Raw-B coefficients, i.e.:

Predicted satisfaction = $0.892 - 0.358 * (\% \text{ Aged } 16-24) + 0.122 * (\% \text{ Degree Educated}) - 0.294 * (\% \text{ non-white})$

Put simply, museums serving a local area with young and less well-educated population with a high penetration of residents from Black and Minority Ethnic groups are expected to achieve the lowest satisfaction scores.

In the chart on page 9, we present each of the 41 museums, with a base of over 30 local visitors. (The other two museums were excluded on the basis of the sample being too small and hence unreliable for this analysis.) Each museum's actual satisfaction score is shown in the right hand column, compared to the predicted satisfaction score (the bar). The museums are presented in order of the largest positive gaps between the two (i.e. the amount that achieved satisfaction exceeds the predicted benchmark score), to the largest negative gap.

"Top of the league" is the Discovery Museum in Newcastle, which scores 95%; eight percentage points higher than its benchmark. It was only expected to score 87% on the basis of it covering an area with 7% of local visitors who are non-white, and a relatively young population (13% aged 16-24).

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. (In fact, the calculations used for this estimation are based on a truly random sampling methodology. For the approach used for this survey, we should treat these figures as indicative, rather than entirely accurate.)

For example, on a question where 30% of the people in a sample of 16,741 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:

	95 % Confidence Intervals		
	10% or 90%	30% or 70%	50%
Sample Size	+%	+%	+%
16,741	0.4	0.7	0.7
7,505	0.7	1.0	1.1
2,535	1.2	1.8	1.9

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

	Margins (%) which are just significant (at 95%)		
	Approximate % to which margin relates		
	10% or 90%	30% or 70%	50%
Sample Size	+%	+%	+%
17,578 and 16,741 (2003 vs. 2004)	0.6	1.0	1.1
6,439 and 1,814 (ABs vs DEs)	1.6	2.4	2.6
10,239 and 6,364 (First time vs repeat visitors)	0.9	1.4	1.6

It should be noted, though, that by applying weights to the data, so that our data are representative of the views of all those visiting the selected museums, this has an impact on the 'effective sample size'. By up-weighting some of the results, and down-weighting others, the effective sample size for the survey as a whole falls from **16,741, to 13,473**. In terms of the overall statistical reliability, this has only marginal impact. For example, when comparing weighted results between 2003 and 2004,

a difference of just 1.2 percentage points is required for us to have confidence in the validity of the shift.

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.

SOCIAL CLASS		OCCUPATION OF HEAD OF HOUSEHOLD
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