



Research into admissions pricing policy in museums and its impact: Success Guide

December 2023

Image credit: Surgeons' Hall Museums



Introduction







Introduction

The Association of Independent Museums (AIM) and partners Arts Council England (ACE), Museums Galleries Scotland (MGS), the Welsh Government, the National Museum Directors' Council (NMDC), and the Art Fund commissioned DC Research Ltd working in partnership with Durnin Research Ltd to deliver **'Research into admissions pricing policy in museums and its impact'**.

As part of this research, this Good Practice Guide is designed to be used to help museums and galleries decide admissions strategies that maximise income from those able to pay, put the museum in the right pricing bracket in the market, and still offer pricing options that make it accessible and welcoming to all.

The Guide summarises the key findings around the impact of different charging positions and identifies key lessons and issues for museums to consider when reviewing their own charging position. A summary of key findings is included as an annex at the end of the guide and the full report can be found under 'Resources' on the AIM website.

This guide is based around the following topics:

-  **The importance of business planning and review**
-  **2023 pricing benchmarks**
-  **Communication**
-  **Targeting audiences**
-  **Specific lessons for those that charge**
-  **Specific lessons for those that do not charge**

A clear conclusion from this research is that **pricing cannot be considered by museums in isolation, it needs to be part of the business planning process and be informed by the values of the institution.** Furthermore, it should not be assumed that charging alone is the panacea to all museum issues. There are many other factors involved in improving the viability and sustainability of museums.

Whilst no museum or gallery would wish for a return to the circumstances of the pandemic, pricing responses during and immediately after that period worked well for many museums, and many in the sector were empowered to make quick and effective decisions. **Museums should draw confidence from this** – under pressure, and without perfect information, decisions were taken that allowed for visitors to return despite restrictions and often a partial offer.



The importance of business planning and review

The importance of business planning and review

Reviewing pricing strategy annually is good practice, and price increases need to be part of an overall business planning strategy and budgeting. Pricing needs to be part of the business planning process and **informed by the values of the institution** as one potential factor involved in improving the viability and sustainability of museums.

Museums may find AIM's Success Guide - [Successful Business Planning](#) - useful as part of this process

- For those that charge, this avoids 'big jumps' following the deferral of difficult decisions and embeds admissions review in the decision-making culture of the museum.
- For those that don't charge, the review ensures that the rationale behind this policy is annually discussed and considered.
- For all museums, it serves to manage the expectations of visitors, staff and volunteers, and wider stakeholders, and demonstrate organisational responsibility.
- Make sure any changes to admissions pricing are well planned for with sufficient lead in time.

Some examples include:

- Ironbridge Gorge Museum Trust explained that the decision to raise admission was made as part of the annual budget setting process to offset increasing costs whilst still recognising the importance of delivering value for money for visitors and competitor pricing.
- Beamish Museum emphasised the importance of reviewing pricing annually – but also that *“the values of the museum should inform every business decision you make”* – emphasising that decisions about admission strategy and pricing should not be made in isolation. Benchmarking is a *“critical process”* in setting admission prices for Beamish Museum – drawing on a range of relevant local and national comparators and looking at both the offer from such comparators and the price of the comparators is part of this process.
- Black Country Living Museum reviewed admissions as part of budget-setting for the whole museum by the Leadership Team. Scrutiny was provided at Committee and Board based on a recommendation from the Chief Executive.

Many museums use benchmarking as part of their decision-making processes. Using benchmarking can help to give boards or other decision-makers confidence in proposed pricing and ticketing. In doing so, it is important to look at the **relevance of comparators**, and look at their offer, circumstances and key characteristics, and whether comparisons are reasonable and meaningful.

Wordsworth Grasmere emphasised the importance of doing lots of benchmarking around pricing, especially following redevelopment to check how they compared with other relevant museums and visitor attractions – emphasising that benchmarking with other visitor attractions of different types that have similar dwell times was important, not just looking at museum comparators. Making sure non-museum benchmark comparators are relevant in terms of dwell time, audience type, quality of offer, and facilities is important.

Decision making should always be based on good data and sound analysis.



Charging benchmarks



Charging benchmarks

The table below shows average prices from the survey for those museums that charge for general admissions. The survey was carried out in spring 2023 and refers to prices at this time.

	Mean (£)	Median (£)	Lower Value (£)	Upper Value (£)	Count
Adult	8.99	7.60	2.00	45.00	210
Concession	7.63	6.60	-	26.00	126
Child (older)	3.64	3.00	-	18.00	204
Child (younger)	0.70	-	-	8.50	198
Family	26.46	24.00	7.00	77.00	105

When setting prices organisations may want to reflect on where their museum and visitor offer sits within national and local benchmarks, based on understanding their own offer and how it might be perceived by potential visitors.

The results show:

- The median price for an adult ticket for general admission is £7.60.
- The median price for a concession ticket for general admission is £6.60.
- The median price for a younger child ticket for general admission is £0.
- The median price for an older child ticket for general admission is £3.
- The median price for a standard family ticket for general admission is £24.

There is some geographic variation in average admission prices – the median adult price in both England and Scotland was £8, whilst for museums in Wales it was £6.50.

Museums in the North of England report a lower average adult price than museums in the Midlands or the South for adults (£7 compared to £8.80 and £8) and concessions (£5 compared to £6.88 and £7). Furthermore:

- There is little variance of the median prices by type of museum for adults, but some slight variance for other ticket types. Whilst there is little variance between median admission prices by type of museum, the likelihood of charging or not does vary more by museum type. Therefore, whilst prices do

not vary much by museum type, the propensity to charge does.

- There is no variance in the median adult price between the main categories of core funding.
- Adult median prices are typically lower in areas that report it is ‘not at all competitive’ to attract visitors. For those museums that do face local competition for visitors, competing on price does not seem to be a common strategy – areas with greater competition show higher median prices relatively.
- The more significant the museum reports that it is to the visitor economy of the local area, the higher the median admission prices.
- The bigger the museum, the higher the adult median price (£6.75 for museums with up to 20,000 visits; £12 for museums with between 20,000 and 50,000 visits; £13.50 for museums between 50,000 and 100,000 visits, and £19.80 for museums with more than 100,000 visits).
- Those museums who report 50%+ of visitors are local, have a higher median price compared to those where locals account for less than 50% of visitors.

More detailed benchmarks based on different characteristics of museums, which may aid individual museums in deciding pricing, are available in the full report.

As well as looking at national benchmarking, organisations can research nearby museums and heritage and other visitor attractions to understand where their proposed pricing would fit in with the local offer.



Impact of changes to admissions charging strategies



Impact of changes to admissions charging strategies

For those museums that did change their admissions charging position, the most common type of change by far is an increase in admission prices (70% of those that made a change), followed by the introduction of new type(s) of tickets (30% of those that made a change). Making a more fundamental change has been less common but has occurred – 18% reported moving from charging to free admission whilst 11% reported moving from free admission to charging.

For those that introduced **an increase in admission price**, the most positive impact is that total admissions income had increased, and some even reported positives in terms of the number of visitors, and secondary on-site spend. Many museums that raise prices reported that there was little negative impact, and some found that they had been underpriced for quite some time.

Concern about price sensitivity, and a related sense of nervousness, and (on occasion) timidity around charging does not appear to be solely a staff issue, with some museums reporting concerns raised by volunteers, and others identifying reluctance from Trustees when presented with recommendations to raise prices by staff.

The most positive impact concerning **the introduction of new ticket type(s)** is an increase of total admissions income, followed by number of visitors and demography and diversity of visitors. Many museums reported no change as the most common impact for most aspects considered as a result of changing ticket types. Some museums noted a greater take up in annual passes because of the cost-of-living crisis. This can be regarded as visitors looking to derive further value from their visits.

Moving from charging for admissions to free entry typically generated improved visitor numbers as well as positively impacting on the demography and diversity of visitors and also on-site spontaneous donations. Other positive impacts reported include on secondary on-site spend and also the museum's relationships with the local community. The most negative impact is, unsurprisingly, on admissions income.

Museums that **move from free entry to charging for admissions** highlight the most positive impact being a rise in total admissions income, followed by positive impacts on the number of visitors and the dwell time of visitors. Beyond that, many museums highlighted that there was no change in impacts, although some suggested that there were negative aspects around fewer visitors and a reduction in on-site spontaneous donations.



Communication

Communication

Communication is vital,
and this cannot be overstated.

Key lessons from Kirklees Museums & Galleries about changing the admissions pricing strategy include listening to the front of house teams – “*they are the ones that talk to the visitors*”, as well as appreciating the bureaucratic and technical challenges that can be faced with implementing new systems (especially for local authority museums) – “*be patient*”. The importance of recognising that there is a change in culture with a change in admissions strategy and “*taking staff with you*” on that change – empowering them and getting buy in from staff to “*make sure they are part of the process of change*”.

Explain charging decisions. **Everyone in a museum, from the boardroom to front of house, paid or volunteers should understand and advocate for the museum.** This goes two ways, so listen to your audiences and listen to your front of house team. Their experiences and perspectives are valid and most valuable.

Be very clear in communications about why any changes in pricing have occurred, especially big changes. This can include clear narrative on increasing costs for the museum as well as narrative about adding to the quality of the offer that visitors get. It is important to stress the value that visitors get as part of these communications.

Dinefwr emphasise the importance of “*clarity of admission prices*” and the “*reasons for cost help visitors to understand the value of their admission*”. As with many other examples, they also highlighted that “*staff need to be well trained in this and have confidence in the costs*”. Dinefwr also emphasised that “*it is not easy to do*” making such a change – “*don’t let people think it’ll be easy*”, and that it is important to have “*open communication*” and “*talk through the issues*” with the team and to “*bring the team with you*” – be “*open and honest*” with staff and with visitors. Lots of different elements underpinned the success that has occurred, especially “*the confidence and determination*”.

An independent museum with no core funding that needs to charge to be viable must communicate this clearly and confidently both internally and externally. Be prepared for these conversations, and train front of house staff and volunteers to positively have them with visitors.

Visitors arriving at the desk with differing expectations around admissions can lead to tension, embarrassment and frustration. **Make sure you are as clear beforehand as possible to avoid any scope for difficult conversations at the desk** (examples can include on charging extras for exhibitions, complex family tickets, issues over gift aid, donations etc.). This may include using websites or posters or other information onsite to make ticketing clear so people know what to ask for).

There is evidence of some **ticketing simplification** or streamlining, with fewer ticket types being offered. Ticket simplification offers a range of benefits to museums, especially around an easier and smoother process at front of house for both visitors and staff/volunteers.

Beamish Museum reflects on the changes that it has made to ticketing in recent years and has found that using fewer ticket types has been effective – “*the more streamlined the offer, the more visitor focused it is*”; “*we worked really hard to make it easy*”; and “*we still have work to do in this area, and are in the process of reviewing our admissions process - working towards making the most of the digital solutions on the market to give our visitors the smoothest possible entry into the museum*”. Given the number of visitors that Beamish can get in one day, “*it needs to be simple*”.

Many museums are **removing or streamlining concessions ticketing**, and it is important to be clear and upfront with messaging with concessions from seniors in particular.

Ironbridge reported that some concession ticketing was dropped during the pandemic, with tickets being classified as adult, child, student and core carer. There were no reports from front of house teams of any issues with this change.



Targeting audiences

Targeting audiences

Charging does not mean you stop engaging with audiences that are particularly important to your museum or gallery.

For example, the Charles Dickens Museum introduced a partnership-linked free entry, working with charities, partners and community groups to identify audience groups in need and offer targeted free entry.

The National Civil War Museum in Newark is reviewing the challenges of service delivery post-COVID and the impacts of the cost-of-living crisis, with a decision to permanently offer free admission to residents being taken in April 2023 and implemented, driven by low levels of engagement with residents when charged entry, and a need to increase town centre footfall. The museum expects more footfall from target audiences, a better engaged local community leading to improved advocacy, and opportunities to increase on-site secondary spend.

Several museums are introducing free entry for children with paying adults, partly to simplify or streamline ticketing, and partly to target family audiences.

‘Fixed variable pricing’ and Pay What You Like is considered by a few museums to help target audiences (such as those with lower incomes; and those with accessibility needs that might avoid busier periods).





Specific lessons for those that charge for admissions

Specific lessons for those that charge for admissions

It is important to **be confident in making decisions about pricing, and not to undersell**. Many museums that charge argue that annual price increases are generally accepted by visitors if the visit is regarded as value for money.

For example, Brooklands Museum reported that in the past they had lost a significant level of potential income by being priced too low and had raised their prices consistently and significantly over the past five years with no negative effects.

Key lessons around the change in admissions pricing for the Judge's Lodging include having the confidence to do it – *“don't be frightened to do it”*; *“don't be frightened to put the prices up”* – whilst ensuring that there is a balance in the way it is presented, and that you have *“a clear, consistent message”* about prices, and pushing the message about being independent and having to generate income is an important part of that.

Reflecting on the change from free to charging, the National Football Museum notes that *“visitor numbers will drop, but engagement and dwell time will increase”*, in addition to which, income has become *“higher and much more predictable and reliable”*. The Museum highlighted that they *“created a mechanism to let very local people visit for free”*, and that *“after we started charging we worked even harder to make the visit better value and more enjoyable, so our overall offer post charging is better”*.

Most **museums that increased admissions prices reported little audience negativities** over this, reporting no difference in visitor numbers, and little evidence of price elasticity. On-site secondary spend typically appears not to be affected by changes in price.

For example, Bletchley Park Trust found that annual price increases were generally accepted by visitors as long as the value was clear, and whilst visitors might initially feel prices are expensive, such perceptions change when they see the value of the offer.

It is helpful to **introduce significant price increases with new developments**, offering more value for visitors, such as renovation, new spaces, new exhibitions. This is particularly important when nearing a price threshold – museums should always be considerate around moving from, say £9.99 to £10.

For example, Wordsworth Grasmere reopened in 2021 with a new, increased, pricing structure to reflect the increase in offer, balanced by discounted family tickets and a new adult 65+ concession.

Moving from free entry to charging for admissions typically reduces visitor numbers (although often leading to an increase in income) but a mass outcry is rare. The reduction in visitor numbers is mainly due to the introduction of charging stopping fleeting visits to the museum, with dwell times increasing as a result.

Trimontium Museum introduced an admission charge and a subsequent increase in admission price following a major refurbishment, and emphasised the importance of benchmarking with other relevant comparators (i.e., Roman sites in Trimontium's case) as well as giving due consideration to the current economic circumstances and making sure that you *“don't price yourselves out of people's pockets”*. This is especially important for museums in a small community, and the use of incentives such as free access days, community days, etc. are an important part of the offer.

Dynamic pricing is being considered by larger museums to manage peaks (typically by offering discounting for quieter periods in order to manage capacity) and also to encourage participation with target audiences.

The Natural History Museum is looking into how it might dynamically price to help target under-represented audiences (such as those with lower incomes; those with accessibility needs that might avoid busier periods) access quieter slots for popular charged for exhibitions like Wildlife Photographer of the Year.

Most museums no longer offer discounts for online booking.



Specific lessons for those that do not charge for admissions

Specific lessons for those that do not charge for admissions

Charging is not the only method of generating income from visitors. Shops and restaurants work very well for some museums, as do events and corporate hospitality, filming and charged special events. In addition, the role of donations for those that do not charge can be key.

Kirklees Museums & Galleries used to charge for admissions to Oakwell Hall but changed the charging strategy to free admissions as a result of the pandemic, to encourage visitors to return and to provide local people with free access to the Hall. Free admission has been retained for the time being, primarily due to the increase in visitor numbers that has resulted, as well as the wider benefits of such a strategy for the service in terms of addressing community needs and having a positive impact on inequalities. Kirklees Museums & Galleries report that the move to free admissions has impacted very positively on overall visitor numbers (they are now more than three times what they were before the pandemic) as well as the diversity of visitors, and the number of local visitors as well as the feedback from the local community.

Reflecting on the period during which they offered free admissions (due to the pandemic), the Library of Innerpefferay notes that “*when entry was ‘by donation’ or ‘pay what you will’ (during a quiet season) we made significant income from donations*”. It did consider keeping the donation/’pay what you like’ policy – especially as “*it had clear links to our founding purpose/principles*” but donations did not achieve the levels of income from admissions, so charging, but with the offer of the free month in March, works well.

If donations are an important part of a museum’s pricing strategy, it is vital to be clear and coordinated. This includes communicating expectations concerning Pay What You Like, the location of donation points in the museum, and making it easy (if not easier) to make a cashless donation.

Live Borders reflects on a number of key lessons around charging for admissions and seeking donations from visitors that are important for all their museums, and this includes: “*the importance of messaging to people is key*” – especially around emphasising the charitable status and the benefit of the donation to the museum and the collection.

It is important to **train staff and volunteers** to support any approach to donations.

The Heritage Centre Bellingham have found that having a ‘pay what you feel’ admissions strategy is easier for the museum, but strongly emphasise that it was important to train the volunteers around the new strategy of asking for donations. The Centre has found that it is easier to ask for donations, and that this model means there are no issues for volunteers to deal with at front of house with those that do not want to pay for admissions: “*it is a much more positive message*”; “*it is much easier for volunteers to do that - there are no difficult discussions at the front desk*”. The Centre also emphasised that you can “*get a pleasant, surprised reaction*” when visitors find out it is free to go in.

Pay What You Like works well as a donation strategy for some, as it gives a clear message that a donation is expected.



Top tips summary



Top tips summary

The importance of business planning and review

- Pricing should not be considered in isolation, it needs to be part of your business planning process
- Reviewing pricing strategy annually is good practice
- Any price increases need to be part of an overall business planning strategy and budgeting.
- Using benchmarking can help to give boards or other decision-makers confidence
- It is important to look at the relevance of comparators, their offer, circumstances and key characteristics, and whether comparisons are reasonable and meaningful.

Communication

- Explain charging decisions. Be clear in communications about why any changes in pricing have occurred
- Everyone in a museum, from the boardroom to front of house, paid or volunteers should understand the rationale.
- Communication goes two ways - listen to your audiences and your front of house team. Their experiences and perspectives are valid and valuable. Do you collect information about the value of your offer in visitor surveys, for example, to inform future decisions?

Targeting

- Charging does not mean you focus only on audiences who can pay.
- 'Fixed variable pricing' and Pay What You Like is used by some museums to help target specific audience segments
- Some museums offer free entry for children with paying adults, partly to simplify or streamline ticketing, and partly to target family audiences.

Specific lessons for those that charge for admissions

- Be confident in making decisions about pricing, do not undersell. What does, or could, your visitor surveys tell you about the value of your offer?
- Most museums that increased admissions prices reported little audience negativities over this, nor much difference in visitor numbers, and little evidence of price elasticity.
- Previous research has found on-site secondary spend typically appears not to be affected by changes in price.
- It is helpful to introduce / align any planned significant price increases when introducing significant new developments.

Specific lessons for those that do not charge for admissions

- Charging is not the only method of generating income from visitors.
- If donations are an important part of a museum's pricing strategy, it is vital to be clear and coordinated.
- This includes communicating expectations concerning Pay What You Like, the location of donation points in the museum, and making it easy (if not easier) to make a cashless donation.



Key contextual findings from the research

Current charging position of museums



Key Contextual Findings from the Research

Current Charging Position of Museums

Just over half (51%) of museums responding to the survey charge for general admissions, whilst more than one third (36%) do not charge for admissions at all. Just less than one in 10 (8%) charge for both general admissions and admissions to specific exhibitions, whilst 4% charge for admissions to specific exhibitions only.

Overall, 64% of museums charge for admissions in some form, whilst 36% of museums report that they do not charge at all for admissions.

Comparing these results with the previous [‘Taking Charge’](#) research (2016) shows that a higher proportion of museums now charge for general admissions (51% in 2023 compared to 42% in 2016), alongside a decrease in those that do not charge at all (from 43% to 36%). There is also a decrease in the proportion of museums that charge for both general admissions and specific exhibitions (from 12% to 8%).

Local authority museums are less likely to charge for admissions than independent museums or ex-local authority museums. 71% of local authority museums do not charge whilst just 33% of independent museums and ex-local authority museums do not charge. University museums do not charge at all for entry, National Museums charge for admissions to specific exhibitions only, and military museums are more likely to charge for admissions compared to the overall average.

There are only slight geographic variances in terms of admissions charging. Museums in London and the South West of England are slightly more likely not to charge for admissions, whilst museums in the North of England are more likely to charge for general admissions compared to the average, as are museums in Wales.

Those museums for whom core funders account for more than 75% of income are less likely to charge for admissions (64% of these museums do not charge compared to 36% overall). Museums that do not have any core funders closely reflect the overall position with 35% not charging for admissions compared to the overall average of 36%.

A very clear relationship emerges when the self-reported importance of the museum to the local visitor economy is considered relative to the current admissions pricing policy:

- Those identifying the museum as ‘not at all important’ – 27% charge.
- Those identifying the museum as ‘an attraction of minor significance’ – 55% charge.
- Those identifying the museum as a ‘moderately significant attraction’ – 62% charge.
- Those identifying the museum as ‘one of number of significant attractions’ – 72% charge.
- Those identifying the museum as ‘a key attraction’ – 81% charge.

Looking at the charging position relative to the type of visitor museums typically attract shows that museums where the proportion of local visitors account for more than 50% of all visitors are less likely to charge for admissions (41% do not charge) compared to those where the proportion of local visitors is less than 50% of all visitors (24% do not charge).

Key Contextual Findings from the Research

Changes to Museum Admission Charging Position in Recent Years

In terms of any recent changes to the admissions charging position, half of respondents (50%) report not having made any changes.

For those museums that had changed their admissions charging position, by far the most common change was an increase in admission prices (70%), followed by the introduction of new types of admission ticket (30%). Only a small minority of respondents (5%) report introducing a decrease in their admission prices over this period.

In terms of more fundamental changes to their admissions charging, 18% reported they had moved from charging for admissions to free admissions during this period, whilst 11% report having moved from free admissions to charging for admissions.

Museums that reported they had raised prices cited a range of factors that were underpinned by the need to raise income. The predominant reason for this is rising costs, as well as the need to make the museum more sustainable, whilst some linked this to pandemic recovery, and the need to respond to a fall in revenue.

Some museums that changed their approach to charging explained this was driven by the need to simplify ticketing, to increase visitors (overall as well as targeting specific groups such as families and young people after the pandemic), and an improved offer as a result of redevelopment or refurbishment.

Most responding museums that report moving from charging to free did so to increase visitors and sought to maximise donations in various ways. Those moving from free to charging typically cited sustainability as the main factor.

Many museums highlighted benchmarking and competitor analysis as an important part of the decision-making process around charging, with some highlighting the importance of this approach in balancing a need for income generation against fulfilment of overall purpose for the museum.

Some museums highlighted formal reviews as being an important part of the decision-making process for changes to admissions, typically as part of an annual business planning cycle.

In most cases, including those where there had been reviews and analysis, decisions on admissions policy was made by the governance arrangements and processes in place in each museum. Typically, this would be by the board of trustees on recommendation from senior management.

For those respondents that had not changed their charging position but did consider making changes to their admissions charging position many cited the current cost of living pressures as being a key factor, based on concerns the potential negative effect any changes would have on accessibility, engagement with target audience groups and visitor numbers.

A number of responding museums reported that they were actively reviewing their admissions policy or planning to change in 2023. In terms of the main factors that were influencing the potential decision to change charging in 2023, the need to cover increasing costs, increase income, or support financial sustainability was cited by many museums considering such a change. Such costs include staffing, energy and utilities, the cost of stage exhibitions, as well as income lost during the pandemic.

Image credit: Wordsworth Grasmere



Key Contextual Findings from the Research

Other Considerations around Charging

Additional findings on other aspects and considerations around charging include:

- Very few museums (2%) have used dynamic pricing for admissions, although one-fifth have considered it.
- Almost one in ten respondents (9%) have used Pay What You Can / Pay What You Like, and a further one-fifth have considered it.
- Around one-in-twelve respondents (8%) report having used charging for virtual or online access to the museum, with a further one-fifth (20%) having considered it.
- Specific admissions charging for school visits is far more prevalent – 51% have done so and 13% have considered it, with 36% having neither used nor considered it.
- One-fifth of respondents report they have used, or considered using, other specific pricing models for admissions. The most common types of pricing models reported, in order of prevalence, included: charging for group visits; charging for events, workshops, and other activities; specific donations, free entry, or membership models for schools; discounts for online booking / pre booking.
- If respondents for whom Gift Aid is not applicable are excluded, the results show that 38% of museums do not claim Gift Aid for admissions, 34% do claim Gift Aid on admissions using the annual pass scheme, and 28% claim Gift Aid on admissions using the additional 10% scheme.





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