

Flow



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This report is a snapshot of the charging models at museums across the UK in May 2024. As schools and the cultural sector face a challenging economic climate, this research commissioned by the National Portrait Gallery looks to support the sector in understanding the approaches taken by organisations to ensure both equitable access to cultural education, and the drivers for financial sustainability.

The National Portrait Gallery asked Flow Associates to undertake research into current charging models for school visits across the museum and gallery sector, and to make this research available for others to use.

Our Data

The insights in this report are gathered from 95 organisations, 63 of whom completed a survey, with additional detail from a light touch comparative review of 41 organisations. 9 were involved in both.

- The survey was completed by a mix of national, local, funded and independent museums and cultural organisations.
- Our review focused on museums and galleries comparable to the National Portrait Gallery (i.e. 'nationals', art galleries, and those with programmes related to art or history).
- All but 6 of these organisations are free for general public to enter. We looked at the 22 most relevant in more detail.

Image © Flow Associates

Context

Fewer schools are visiting museums than before the pandemic, particularly outside London

- 1 in 3 (35%) children say they hadn't visited a museum in the past year. (YouGov survey of 1,000 6-15 year olds.)
- Over a third (36%) of teachers said visits to museums are down post-pandemic. This increased to 40% of teachers in the Midlands and North West, compared to 31% in London. (Teacher Tapp survey of 8,943 teachers.)
- The number of education providers that London museums engaged with in 2022/23 is 3% lower than 2019/20. Nationally the number is even lower with an 11% reduction. (<u>The Museum of London's annual Museum</u> <u>Survey</u>)

Meanwhile, the cost of a school trip is rising

- Some museums have seen a move towards more independent schools visiting, for example, one museum in our survey sees 30% of its bookings from fee paying schools.
- Anecdotally, the highest cost is coach travel.

Museums recognise this and are trying to keep charges low, but higher costs and cuts to funding means many are considering a rise in their prices

- 51% of independent museums use an admissions charging model for school visits, and a further 13% have considered doing so. (2023 survey by the Association of Independent Museums.)
- Many museums held prices flat for schools in 2023 despite it being a better year than 2022 in terms of school visits. (AIM, as before.)



Budgets this year for both the schools and the families who attend are extremely tight, and by asking parents to contribute to trips/visits - especially if coach travel is attached - you risk excluding those families who can't afford it

Survey, independent museum

Our findings

Most organisations charge for some aspect of school visits

Of 61 organisations in our survey:

- 95% of organisations charge for facilitated sessions (56). Of the three who don't, one has a remit to attract all London schools, and another is considering charging.
- 54% have an entry fee for schools, almost all at a reduced rate from that charged for public or general group visits (33). Those who don't charge schools tend also to be free to the general public.
- There were a few (5) where schools pay more per child than general public but this was generally because special activities and tours are included in the entry fee.

Of 41 organisations in our comparative review:

- 61% advertise a charge for school activities (25), generally for facilitated workshops.
- Only 14% had an entry fee for schools, with concessions (5).

These, plus one more, were the only organisations in our review who also charge general public for entry.

- 26% offer a completely free programme including a facilitated session (11). These organisations tended to:
 - cover a specialised subject,
 - offer free public entry,
 - be driven by their charitable status, or
 - recently re-opened and/or are running trial content.

Most offer paid-for facilitated sessions, and many

include free self-led visits

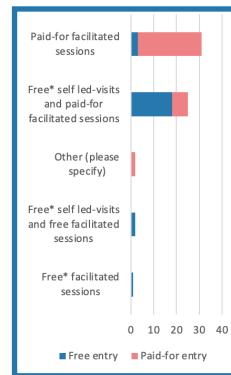
Our survey asked which of a selection of options most closely describes their core schools offer (see fig 1).

- 92% offer paid-for facilitated sessions
- 41% also offer free self-led visits, most of which don't charge schools an entry fee.

Comparative review:

- Of the 22 organisations we looked at in depth, most of which were free to enter:
 - 14 offered free self-led visits + paid-for facilitated

- session, 6 of these also offered some free facilitated sessions
- 5 offered free self-led visits and free facilitated sessions
- 2 offered free self-led visits only
- 1 offered free facilitated sessions only
- 1 offered a paid-for facilitated session only.
- Cancellation fees are common even for free sessions. These often covered expenses of administration and facilitation costs, particularly where freelance staff are employed.



Charges for facilitated sessions average at £114

Our comparative review looked at 15 organisations who charge for facilitated sessions. 6 survey respondents also gave us details of thier prices.

While this is not a comprehensive overview of charges across the sector it gies us a useful snapshot of the current situation in May 2024.

- The average price was £114, with a median of £100 and mode of £75.
- Organisations charging per child (shown in pink) vary from £2.50 to £5.
- The lower cost sessions tended to be for smaller groups or shorter session
- Higher prices tend to be for a full day, or include materials or other resources such as guest speakers.
- Some organisations vary prices by session length, others by age, and some by whether schools are fee-paying or state funded.

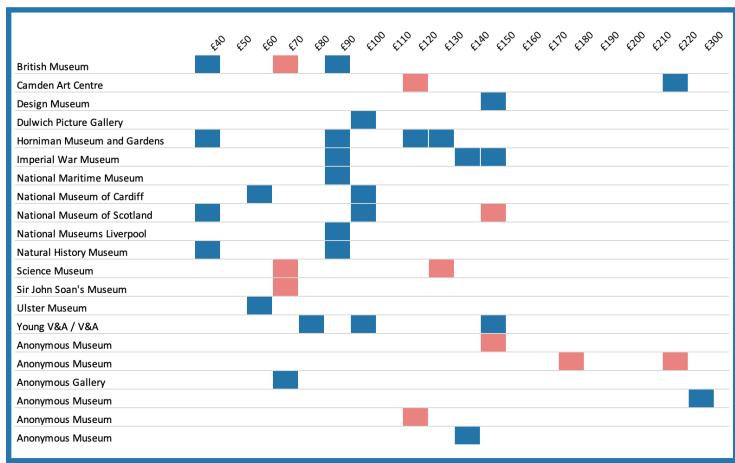


Fig 2: Overview of charges to schools

Charges cover a range of costs

Our survey asked respondents to choose from a list of reasons for charging for schools sessions.

The most common reason was to cover the cost of facilitation, followed by generating income towards core costs and covering the cost of materials.

Other comments included that these charges do not cover all the costs, that charging can be a way of managing numbers at busy sites, and that they have fewer 'no shows' for paid-for sessions.

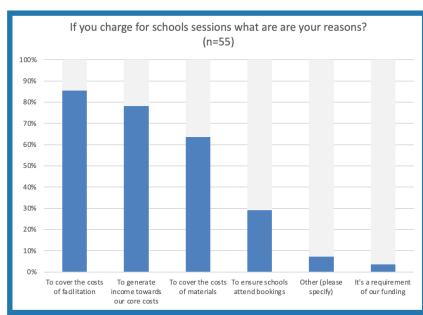


Fig 3: Reasons for charging

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We raised prices 5% this academic year after keeping them static for a long time, mostly to cover a pay award.

Survey, independent museum

Many are about to review their pricing structures

56 organisations in our survey told us about their experience of charging for their schools programme.

- In general they feel schools find their programmes good value for money, and most are going above and beyond to ensure this continues. Many have always charged, and all plan to continue.
- Many organisations told us they have kept their prices low or free for as long as they can but are now considering making a change in their pricing.
- There is nervousness about raising prices in the current climate, but some organisations

are under pressure to do so for financial reasons. This includes a need to pay staff more, or keep up with inflation.

Those who introduced charges after being free, or increased prices for those more able to afford it, have not experienced push-back from schools.

Other reasons for change

Some would like to review their prices to widen access, which may mean reducing the cost to schools. However, for many this is not possible. Others are considering simplifying their pricing structure to make it simpler for teachers to navigate and plan.



Prices have always been kept competitive but this can be difficult to explain to SLT in our organisation. We will have to raise prices now more than we have in the past, due to the recent rise in the National Living Wage.

Survey, independent museum.



Widening Access

Free programmes and offers for schools

Free self-led visits were mentioned by survey respondents as a way to ensure more schools can benefit from a visit.

"School budgets are always a consideration so having a self-led option allows for more schools to visit."

Survey respondent, Art Gallery

One organisation observed that there is a difference in the type of offer different key stage groups are taking up, with KS3 more able to pay for facilitated sessions than KS2.

"We are seeing less schools book a facilitated session, especially at KS2, and teachers are more and more opting for a self-led visit. We have seen an increase in KS3 visits as schools seem to be getting funding to help with building cultural capital, and these generally have facilitated sessions as part of their visit."

Survey respondent, Independent museum

For some, the free self-led visit adds value to schools who are paying for other aspects. However, others told us there is a 'low conversion rate' to

paid for programmes from a free self led visit.

"Due to minimal charges and entry and self-led visits being free we have always had those that chose to pay for additional extras. Added extras schools feel that enhance their visit. Adds to their itinerary, less planning for teachers, a range of activities for the schools."

Survey respondent, National museum

Examples of digital, virtual or remote sessions

Sessions delivered online tend to be offered for free or reduced prices across the board. Sessions which reach multiple schools in "open" broadcasts may be used to increase access and reach without the associated administration of onsite sessions.

- Museum of London Docklands
 Live streams: free facilitated
 sessions streamed via YouTube,
 reaching 1k 3k per session
- Natural History Museum
 Charge £10 per session, for 45 -60 mins.

• V&*F*

Free "Make Along" webinars for Primary schools, with multiple participating.

Wallace Collection

Free sessions for Primary and Secondary. They recommend one session per class but can accommodate two.

- National Museums Liverpool Charge £49 - £99 per session.
- National Maritime Museum Charge £60 per session for a class of 30.

Design Museum

Charge £75 for Sustainable Design supported by Swarovski Foundation). Charge £120 for Digital Design per two-hour session for max. 30 students.

This includes a handling pack delivered to the school with resources for extended teaching.

Bursaries for equal access

Of the 61 organisations in our survey: 79% offer a bursary or concession for specific groups (45).

- 24 mentioned external funding to make this possible, often with sponsorship or funders for specific projects, for example, linked to temporary exhibitions. External funders mentioned include Freelands Foundation, The Arts Council, John Lyons Charity, and The Portal Trust and individual donors.
- Criteria tends to focus on pupil premium / free school meals (16), SEND (9) or location (16). Others mentioned groups with specific characteristics, such as refugees, asylum seekers, LGBTQIA+ or simply attracting new audiences

- 3 said they offer free sessions to schools when they are testing new workshop or pilot projects.
- 10 specifically mentioned travel bursaries, subsidising the cost of a coach, either from their target boroughs or to assist wider access. In more general comments, over 30% (20) specifically mentioned the cost of coach travel as prohibitory for schools.
- Museums with free entry were

less likely to mention a travel bursary, and when they did they were on a project basis or externally funded, e.g. by The City of London School Visits Fund, or "Great British School Trip" bursary scheme, sponsored by Hyundai.



We've recently created an additional discount which is free to access for schools within our county. We will negotiate with schools who tell us they are struggling to get payment from parents - working on the principle that I'd rather they visited at a further reduced rate than didn't come. Survey, independent museum

Bursaries and funding to cover transportation

Our contextual review looked for examples of bursaries or funding dedicated to transport costs.

- The Imperial War Museum and Natural History Museum offer Financial support with The Great British School Trip sponsored by Hyundai, which offers a selection of free school trips and travel bursaries to reduce costs for schools. This is all administered and run by Hyundai. Some other museums we looked at are included in this scheme, such as the V&A, but it is not clearly highlighted on their website.
- Historic Royal Palace offer an access fund for state schools with 30% or more pupil premium or 15% SEN. This includes a travel subsidy, calculated on distance, up to £2k and free access to their otherwise paid for programme.
- Cutty Sark offers bursaries for local state schools with over 25% of students receiving free school meals.
- Warwick Arts Centre provide bursaries for coach transport for schools within the local area.

- The American Museum offer a £300 travel grant via their funders to schools with higher pupil premium Grants.
- Museum of London offers £300 travel grants via the City of London School Visits Fund for schools with over 35% pupil premium.

Avoiding Pitfalls

Lessons learned and shared

- Free Access versus Charged Sessions: there is a need for clear communication, in particular to parents, where entrance is free but facilitated sessions are charged. Be clear when talking about the value of your learning offer and its life experience for the students.
- charging schools may create barriers for disadvantaged or under-resourced students, or schools that cannot afford the fees, potentially limiting the programme's impact. Ensure that your free offer or self-led programme is well advertised and to add value, try to include some interaction with staff, even if it is just a greeting and orientation.
- School Programmes as Income Generation: although a schools programme is likely to create income, it is unlikely to generate net profit. We have heard from peer organisations that they have received pressure from senior leadership teams for programmes to cover costs. It is worth being clear internally that from the onset of charging, it is a step to building some financial sustainability whilst achieving strategic and charitable aims, rather than commercial revenue generation.

- Perceived lack of accessibility: charging schools might be perceived as elitist or exclusive, contradicting the sector's mission to provide inclusive educational experiences. Carefully consider how your project work or other funding can ensure that you are still reaching your local communities who will benefit the most from your work.
- Alternative options: other
 museums or organisations may
 offer free or low-cost educational
 programmes, making it
 challenging to compete. Link your
 programmes to what teachers are
 looking for in the curriculum and if
 possible, build local relationships
 with schools.
- Managing payments: charging at the point of booking can cause some issues for schools, especially when an invoice is not issued, as there can be policies limiting the use of credit/debit cards. Have a Plan B in place for when schools do encounter that problem and if possible, work with your ticketing team.
- Administration: if the bookings are managed by the Learning team, there may be additional burden on staff on top of the existing communication and enquiries they deal with.

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The actual process to charge a school is very time consuming and also has a hidden administration cost. We have our workshops bookable online so that schools can pay online. Setting up the system takes additional time and knowledge on how to do it. I am doing this myself at the moment.

Survey, independent museum.

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The 61 organisations responding to our survey were:

Amberley Museum, American Museum & Gardens, Andrew Carnegie Birthplace Museum, Australian Museum, Battle of Britain Bunker, Beamish Museum, Bristol Museum and Art Gallery, Broadway Gallery and Museum at One Garden City, Charles Dickens Museum, Clifton Suspension Bridge Trust, Crich Tramway Village, Cutty Sark Trust, English Heritage, Eureka! The National Children's Museum, Exploring Evolution - Cambridge University Library, Gilbert Whites House and Gardens, Haslemere Educational Museum, Historic England, Historic Royal Palaces, Horniman Museum, Ironbridge Gorge Museum Trust, Kirklees Museums and Galleries, Leicester Museums & Galleries, Macclesfield Silk Museum, Maidstone Museum, Manx National Heritage, Museum of Cannock Chase, Museum of London, Museum of the Home, National Museum of Scotland, National Trust for Scotland, Natural History Museum, Nottingham Contemporary, Orleans House Gallery, Peterborough Museum, Quentin Blake Centre for Illustration, Royal Armouries Museums, Royal Observatory Greenwich, Science Museum, Scottish Maritime Museum, Shepton Mallet Prison, Shire Hall Museum, St Albans Cathedral,

Stockport Museums, The Blandford Fashion Museum, The British Museum, The Design Museum, The Lightbox, The Mary Rose Museum, The Pankhurst Centre, The Postal Museum, The Scottish Fisheries Museum, The Shuttleworth Trust, The Watercress Line heritage railway, Trowbridge Museum, V&A, Wakefield Museums & Castles (Wakefield Council), Warwick Arts Centre / Mead Gallery, Westminster Abbey, Wordsworth Grasmere.

And finally, thanks to the National Portrait Gallery for commissioning this research and allowing it to be shared.

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