BAKERRICHARDS

# Art Fund and ALVA

## Twenty-five years of free entry to national museums

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# Foreword

**Visits have almost doubled since England's national museums introduced universal free entry. The seven museums that dropped their charges grew more than twice as fast as those that were already free. Those museums now attract more visitors than the ones that were free all along.**

**Of all the evidence we gathered, that's probably the clearest finding.**

Art Fund and ALVA asked us to look at over 25 years of evidence. We read 78 sources, from annual accounts and Hansard to National Audit Office reports and academic research. We extracted museum visiting from 435,949 International Passenger Survey records, built a dataset from ALVA's visitor figures back to 2004, and rebuilt the funding series from 1999/00 in today's money, to within 1% of the NAO's figures.

Some of what we found was about the evidence itself. We traced quoted figures to their sources. One statistic about why tourists visit Britain turns out to exist in four different versions, from different surveys asking different questions. A House of Commons Library briefing understates one museum's funding by £19m.

And that's before the changes of definition, of survey methodology, of which museums are counted at all. Two of the museums in the 2011 figures are no longer in the group. DCMS's visitor profile data for the national museums ended in 2012/13. The survey behind the tourism data was redesigned in 2024. The Liverpool total had to have one museum removed from it because two sites share an entrance. And there's no clean start year: children were already free from 1999, over-60s from 2000, and Tate Modern opened, free, in May 2000.

**The findings tell a story about the role free entry has played in English life and politics over the last 25 years.**

It is a story about who comes. Visits grew across every socio-economic group and overseas visitors now make up almost half of all attendance, having grown while domestic visiting fell.

It is a story about money. The museums now earn more from their own activities than they receive in revenue grant-in-aid, while revenue grant-in-aid is 11% below its pre-pandemic average in real terms and their spending is only 1% below it. Free entry now looks like the base the museums' earned income is built on.

It is a story about politics. Free entry was made a condition of funding rather than a matter of law, in a letter rather than a statute, which stopped being published in 2015. It has been in place under nine prime ministers and through three recessions.

And it is a story about evidence. Twenty-five years of argument have been conducted with figures that often cannot be traced, and the question now being asked, what charging would actually raise, has not been modelled by anyone in public.

We haven't made the case for or against free entry. This report is the evidence, checked and sourced, for others to make it with.

# Key figures



## 96%

### Growth in visits

- Visits to the 15 national museum groups rose 96%, from 22.77m in 1999/00 to 44.67m in 2025/26
- The seven that dropped charges in 2001 grew 58.9% by 2005/06, against 27.1% at those already free.

## 6 of 10

### Top attractions

- Six of the ten most visited ALVA member attractions in 2025 are national museums.
- Eight of the top twenty are.
- The top-ten count has been between six and eight every year since 2004.*
- Only one of the top ten, the Tower of London, charges for entry. The three sites that have moved above them since 2011 are all free.

## 46%

### Overseas visitors

- Overseas visitors made 19.4m visits to the 15 in 2024/25, 46% of the total.
- Among visitors to Britain, 11.82m trips included a museum or gallery in 2024, 30.3% of all inbound visits.

## 84%

### Growth in visits, funding and cost

- Visits rose 84% between 1999/00 and 2024/25 while grant-in-aid rose 27% in real terms
- Real grant-in-aid per visit fell 31%, from £17.38 to £11.97.
- Revenue grant-in-aid, which pays for opening the doors, is 11% below its pre-pandemic average in real terms, while capital funding is well above it.

## 72%

### Public support

- 72% say some revenue from a potential tourist tax should be used to help keep national museums free to enter for all
- 76% say government should maintain or increase museum funding.
- Source: Art Fund polling by More in Common, March 2026, over 2,000 UK adults

Each figure is sourced and explained on the slide that covers it later in this report.
*Except in the 2021 Covid year when it fell to 4

# How the comparison works



## What we compare

For this analysis, seven museum groups are classed as formerly charging and eight as already free. The table shows the group-level classification used throughout.

This grouping allows us to see whether visits changed differently at the two groups after universal free entry was introduced in 2001.

## What it can't prove

The groups were not identical. They had different locations, collections, visitor markets and major capital projects, and the main series starts in 1999/00.

Free entry came in stages: children from April 1999, over-60s from April 2000 and everyone from December 2001. So, 1999/00 is the only full year before free entry for over-60s and everyone else and children were already free at this stage.

| Formerly charging (removed general admission charges in 2001) | Already free |
|---|---|
| Imperial War Museums | British Museum |
| National Museums Liverpool | Horniman Museum |
| Natural History Museum | Museum of the Home |
| Royal Armouries | National Gallery |
| Royal Museums Greenwich | National Portrait Gallery |
| Science Museum Group | Sir John Soane's Museum |
| Victoria and Albert Museum | Tate |
| | Wallace Collection |

This is a group-level classification of today's 15 DCMS-sponsored museum bodies. Individual sites within some groups had different charging arrangements. For example, some Imperial War Museums branches continued to charge, while the Science Museum Group and V&A included individual sites that were already free. Parliamentary evidence from the time makes the same distinction between institutions and individual sites.

Sources: [1] DCMS visit trends; [8] Caring for our Collections; [24] DCMS free-entry evidence.

# Executive summary



## Visiting

Visits to the current 15 national museum groups increased from 22.77 million in 1999/00 to a provisional 44.67 million in 2025/26, an increase of 96%.

Attendance remains around 10% below the 2018/19 peak of 49.65 million.

## Comparison

Visits rose much faster at the formerly charging museums: 58.9% between 1999/00 and 2005/06, compared with 27.1% at museums that were already free.

The difference continued over the longer term, affected by multiple other factors.

## Overseas visits

Overseas visits have grown while domestic visits have fallen.

Between 2008/09 and 2019/20 overseas visits rose 74.5%, from 13.9m to 24.2m, while domestic visits fell 11.7%, and in 2019/20 overseas visitors made just over half of all visits for the first time.*

In 2024/25 they accounted for 19.4 million visits, or 46% of attendance.

## Access

Museum visiting rose across both lower and higher socio-economic groups in England between 2005/06 and 2015/16. The gap between them stayed about the same.

Participation rose from 28.3% to 37.4% among lower socio-economic groups, and from 51.9% to 61.5% among higher groups.

AIM also found little difference in the social profile of visitors to free and charging museums.

## Funding

Between 1999/00 and 2024/25, visits increased by 84% while total grant-in-aid increased by 27% in real terms.

Since 2016/17, the balance of funding has shifted towards capital.

On the NAO's published real-terms series at 2024/25 prices, revenue grant-in-aid fell from £375m to £330m, while capital grant-in-aid rose from £75m to £154m (£388m to £341m, and £78m to £159m, at 2025/26 prices). Real grant-in-aid per visit fell by 31%.

## Charging

AIM case studies show that introducing charges can substantially reduce visits at some museums, although the effect varies. Government has not published an estimate of the net financial impact of charging international visitors.

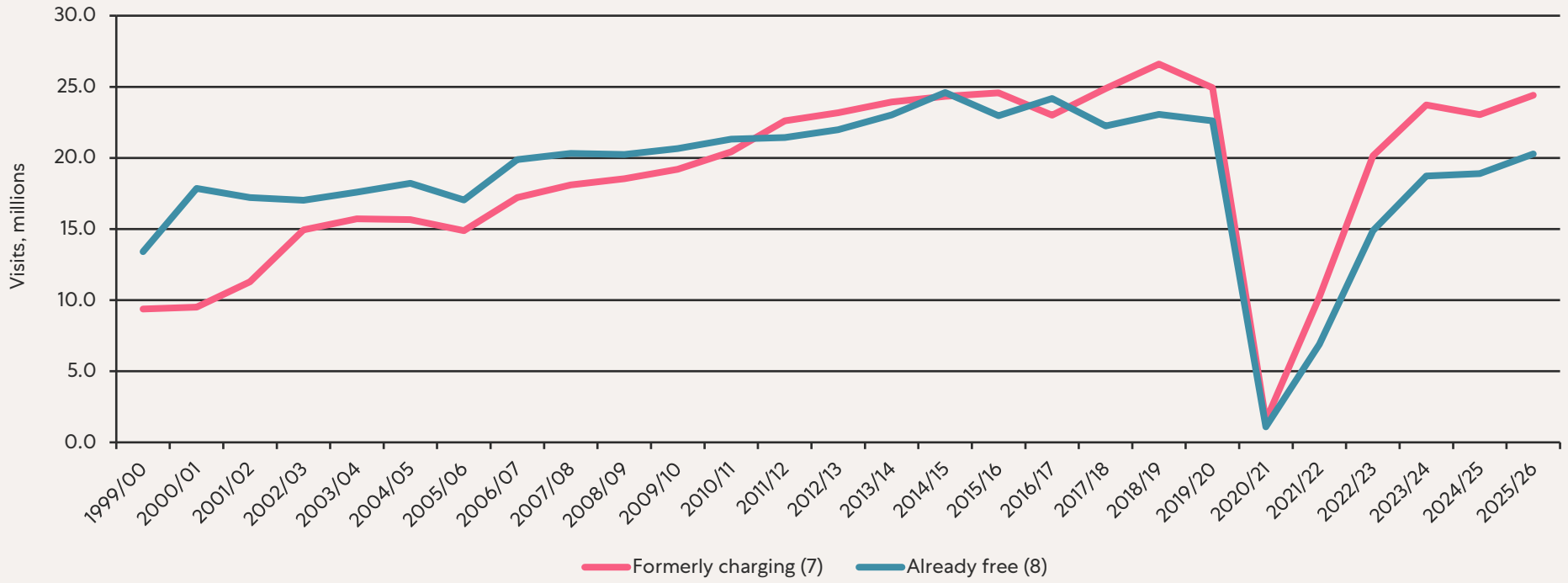
VisitBritain's detailed 2024 activity estimates are awaiting revision. Sources: [1] DCMS visit trends; [2] DCMS monthly visits; [3] Taking Part diversity trends; [4] AIM Taking Charge; [5] NAO financial resilience; [6] HMT GDP deflators; [7] DCMS annual indicators; [10] Commons Library arts funding; [11] DCMS museum income; [26] Government response to Hodge Review; [32] Hansard: Museums and Galleries, 17 November 2008.
*2008/09 figures include Tyne & Wear Museums, sponsored by DCMS until 2015. Excluding them, overseas visits to today's 15 rose about 75%, from 13.8m to 24.2m, and domestic visits fell about 6%, from 25.0m to 23.3m.

# Visits

# Visits to the 15 national museum groups, 1999/00 to 2025/26



In December 2001, seven of the 15 national museums in this analysis removed their general admission charges. The other eight were already free. The chart shows the combined visits to each group.




Total visits are up 96% over 26 years, from 22.77m to 44.67m, having peaked at 49.65m in 2018/19.

The formerly charging seven first overtook the already-free eight in 2011/12* and have been ahead every year since 2017/18. They are now about 20% ahead, or 11% excluding the White Tower, which has always charged.

*Part of this reflects the Royal Armouries counting all White Tower visitors from 2011/12, up from about 0.12m to 1.57m a year. Without them, the seven were still slightly behind in 2011/12 (21.03m against 21.44m).

DCMS marks breaks in its published series in 2010/11 and 2014/15.

Figures count visits, not unique visitors. 2025/26 is provisional. Pandemic years are shown as recorded. Sources: [1] DCMS visit trends; [2] DCMS monthly visits; [24] DCMS free-entry evidence; [32] Hansard: Museums and Galleries, 17 November 2008.

# Growth in the two groups



1

**Early policy period**
**1999/00* to 2005/06.**

Formerly charging +58.9%
Already free +27.1%
31.8 percentage-point difference in growth.

*Children had free entry from April 1999 and over-60s from April 2000, so 1999/2000 is not a fully pre-policy year.

2

**Longer pre-pandemic view**
**2004/05 to 2018/19.**

Formerly charging +69.9%
Already free +26.6%
43.3 percentage-point difference in growth.*

*Excluding the White Tower, which is not in the 2004/05 figures: formerly charging +58.0%, a 31.4-point difference

3

**Pandemic and recovery**
**2018/19 to 2024/25.**

Formerly charging −13.3%
Already free −18.1%
4.7 percentage-point difference in growth.*

*Excluding the White Tower, −14.2% and a 3.9-point difference

4

**Into 2025/26**
**Provisional numbers**

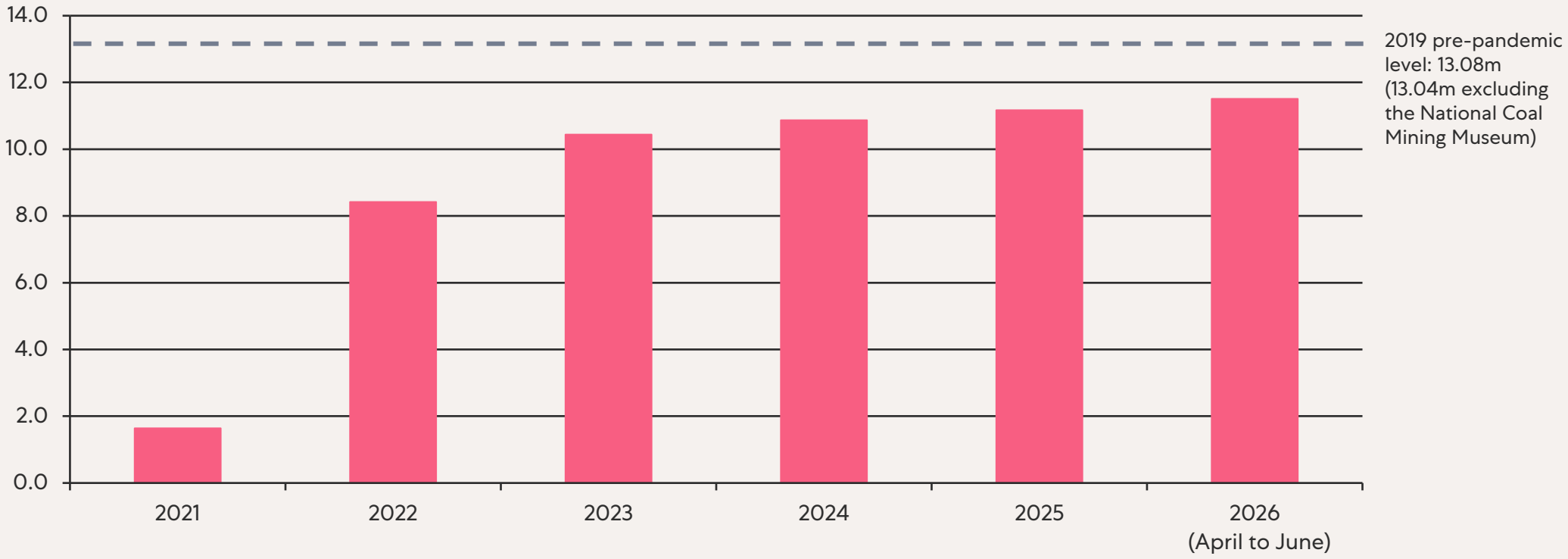
Compared with 2019/20, the last full year before the pandemic, the formerly charging group is down 2.1% and the already-free group 10.4%.

Sources: [1] DCMS visit trends; [2] DCMS monthly visits; [32] Hansard: Museums and Galleries, 17 November 2008.

# Recovery since the pandemic



Visits reached **44.7 million in 2025/26**, an increase of 6.5% on the previous year and the highest total since the pandemic. Attendance remains 10% below 2018/19.




April to June visits have risen for four consecutive years and now stand at 88% of the 13.04m (for the current 15, excluding the Coal Mining Museum, which takes the total to 13.08m) in the same quarter of 2019.

Outside London, visits are 22.5% below 2019/20, mostly because Merseyside Maritime Museum and Tate Liverpool were closed. Excluding those two sites, visits are 4% below 2019/20.

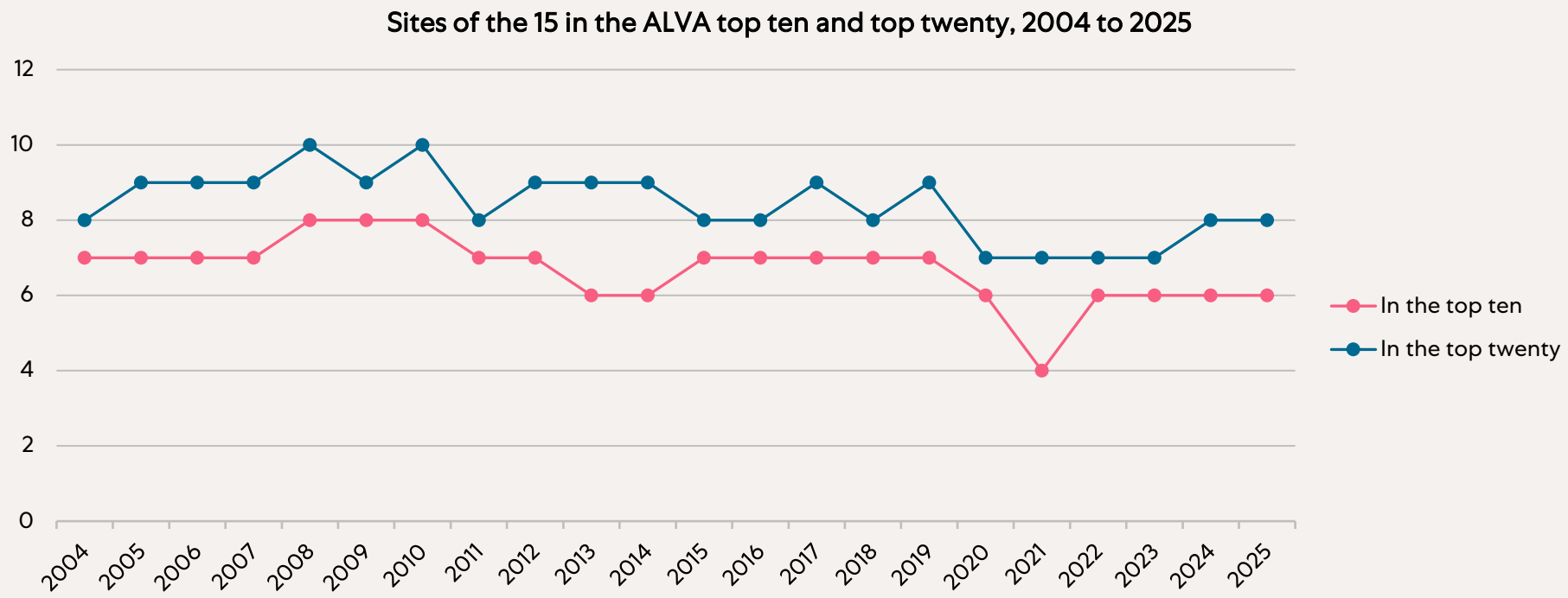
We compare with 2019/20. DCMS's 2024/25 indicators compare with 2018/19, a record year for National Museums Liverpool (about 4.0 million visits, up from 3.3 million, helped by the Terracotta Warriors exhibition at World Museum), and report a 37% fall.

Visits in the April to June quarter, millions. Includes the National Coal Mining Museum. Sources: [2] DCMS monthly visits; [7] DCMS annual indicators; [38] DCMS annual indicators 2018/19.

# National museums in ALVA's top attractions



Six of the top ten and eight of the top twenty ALVA attractions in 2025 are sites of the 15 national museum groups.




The top-ten count has been between six and eight every year since 2004, except 2021, when it fell to four.

Eight of the 2025 top ten are free to enter, including all six national museums. Of the other two, only the Tower of London charges.

The three sites that have moved above them since 2011, Windsor Great Park, Southbank Centre and Somerset House, are all free and all joined ALVA's list after 2011.

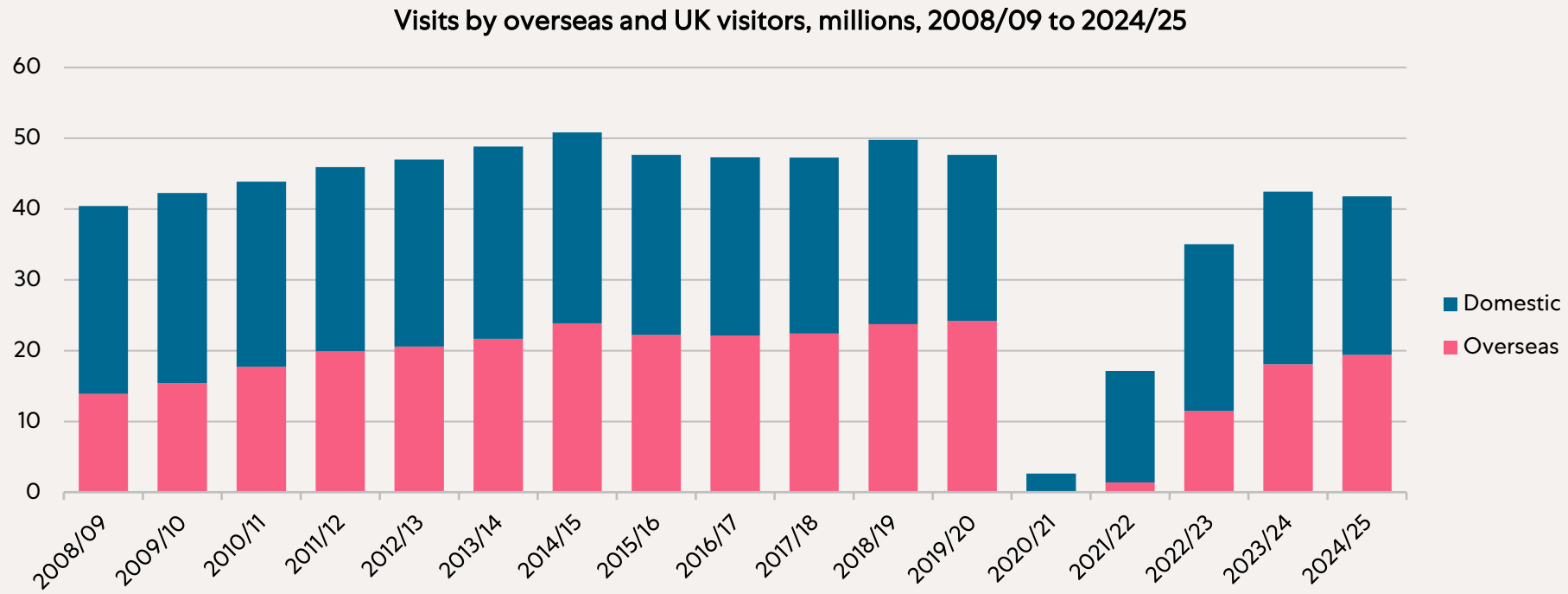
ALVA membership grew from 93 sites in 2004 to 409 in 2025. The Horniman reports to ALVA from 2015 and the Wallace Collection only in 2020. Windsor Great Park is free to enter on foot, with charged parking; ALVA codes it 'Other'. Sources: [22] ALVA visitor figures; [5] NAO financial resilience.

# Overseas visitors and tourism

# Almost half of visits are by overseas visitors



Between 2008/09 and 2019/20, overseas visits to DCMS-sponsored museums rose by 74.5%, from 13.9m to 24.2m, while domestic visits fell by 11.7%, from 26.5m to 23.4m.*




In 2019/20, overseas visitors made just over half of all visits for the first time. In 2024/25 they made 19.4m visits, 46% of the total.

For seven museums with earlier figures, the overseas share was about 33% in 1999/00, close to the 34% for DCMS-sponsored museums in 2008/09 (36% for today's 15).

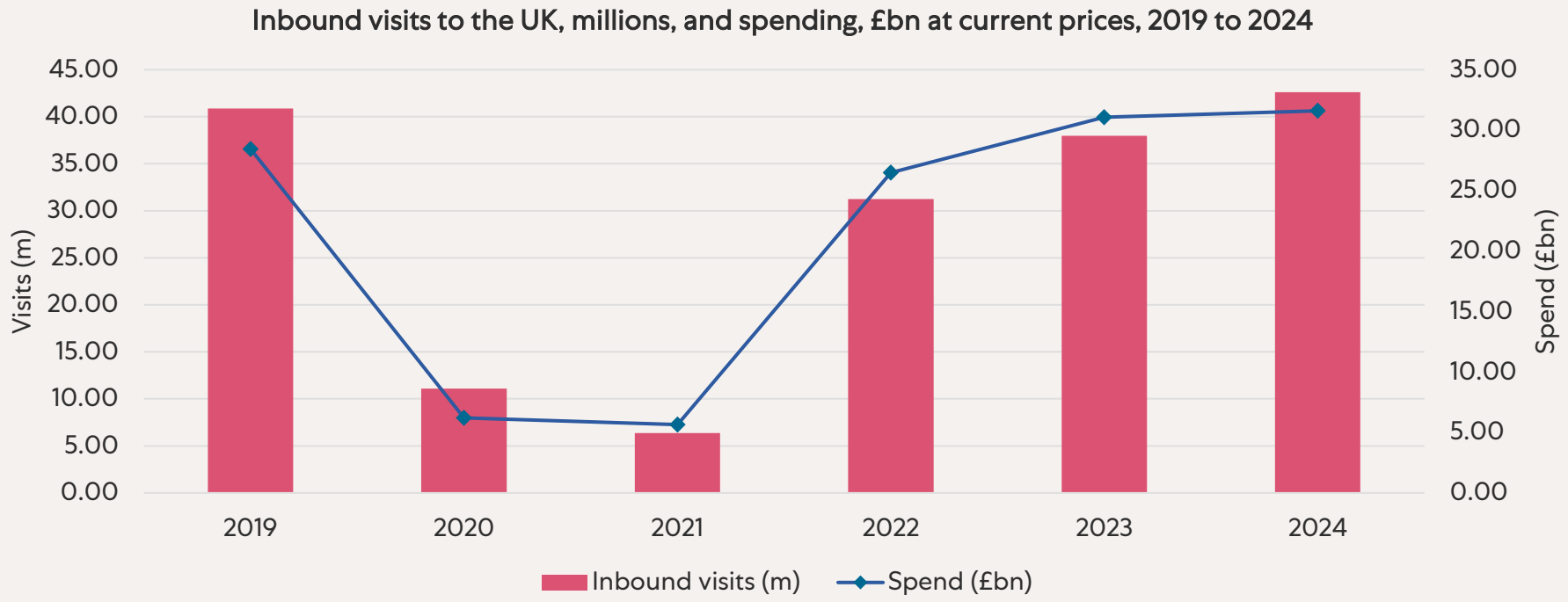
A case for charging would point out that 46% of visits are by overseas visitors, and that museum visiting is much higher among higher socio-economic groups (slide 20), so much of the subsidy benefits overseas and more affluent visitors.

Figures are reported by the museums; 2020/21 onwards are from the NAO, and the 2024/25 overseas figure is from the museums' annual reports. Totals differ slightly from the attendance series. *2008/09 figures include Tyne & Wear Museums, sponsored by DCMS until 2015; excluding them, overseas visits to today's 15 rose about 75%, from 13.8m to 24.2m, and domestic visits fell about 6%, from 25.0m to 23.3m. Sources: [5] NAO financial resilience, Figure 4; [7] DCMS annual indicators; [23] Travers 2006.

# Inbound visits and spend 2019 - 2024



ONS estimates 42.6 million inbound visits to the UK in 2024, with £31.6 billion in visitor spending.




VisitBritain's detailed 2024 activity estimates were current when we did this analysis. VisitBritain has since flagged them for revision, following ONS's September 2026 correction to the 2024 data.

The survey was redesigned in July 2024, so the annual total combines data collected two ways. ONS advises against comparing 2024 with earlier years, so read the 2024 figures as indicative rather than as a change on 2019.

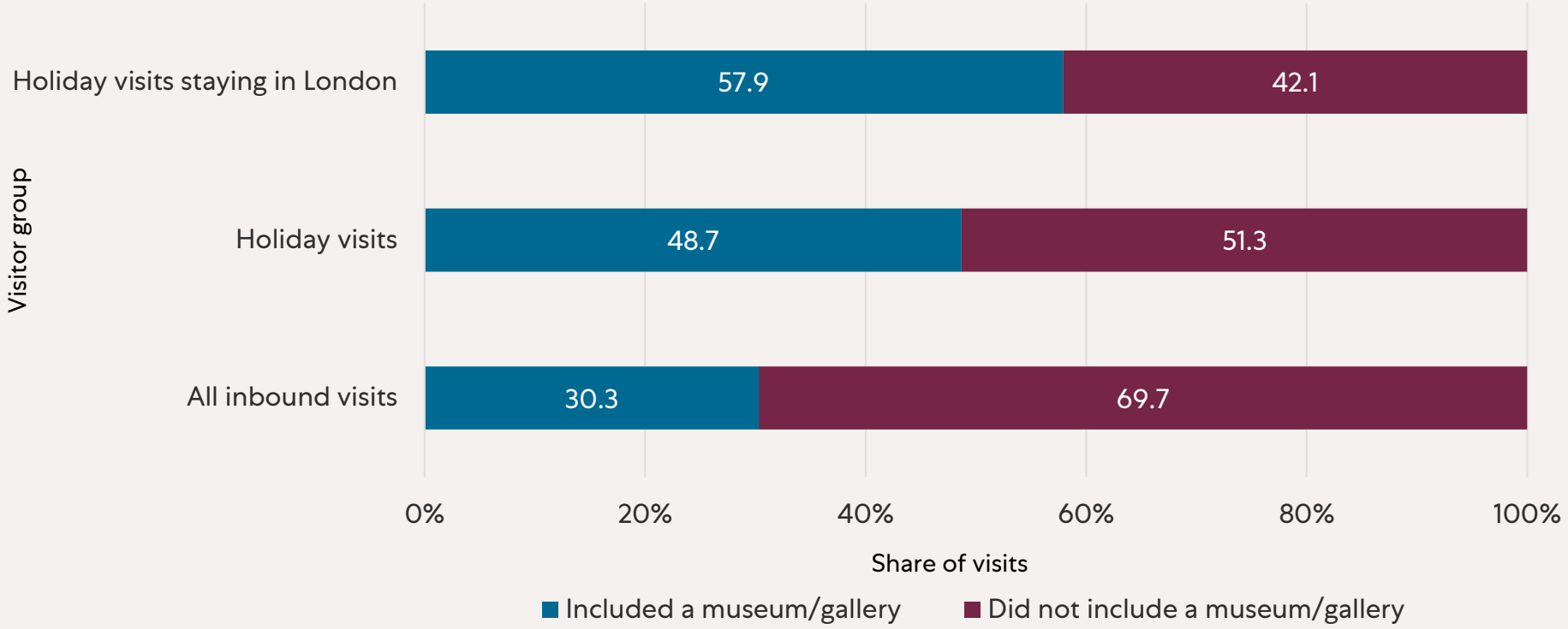
Spend is shown in current prices and is not adjusted for inflation.

Sources: [16] ONS Travel trends 2023; [17] ONS overseas travel 2020; [18] ONS Travel trends 2024.

# Museum visiting among inbound trips



11.82 million inbound visits included a museum or gallery in 2024, 30.3% of the 39.0 million visits to Great Britain.*




Inbound visitors whose trip included a museum or gallery spent £12.66bn across their whole trips in 2024. This is total trip spend, not spending caused by museums.

The data show what visitors did while they were here, not what brought them to Britain.

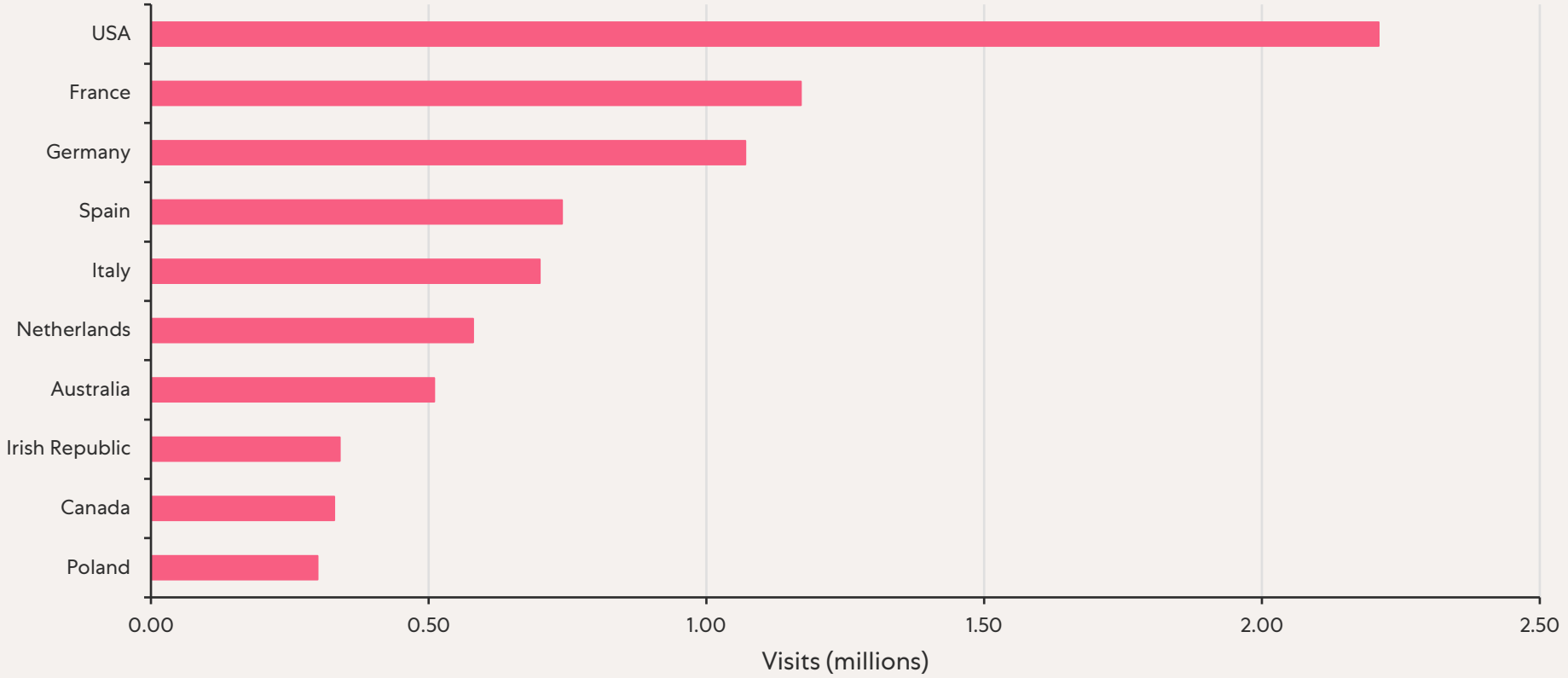
*The base is Great Britain. The ONS UK total of 42.6m on the previous slide includes 3.5m visits to Northern Ireland, now sourced from NISRA and not comparable with earlier years. The survey was also redesigned in July 2024, and ONS does not endorse comparisons with previous years.

Sources: [15] International Passenger Survey 2024; [18] ONS Travel trends 2024; [19] VisitBritain inbound activities.

# The main international markets



Seven countries account for 59% of inbound museum visits in 2024.




Inbound museum visits by source market, millions, 2024. Source: [15] ONS International Passenger Survey 2024

The United States is the largest source market, accounting for **2.21 million inbound visits that included a museum or gallery**. This represents 18.7% of the total.

France and Germany each account for more than one million.

The share of visits that included a museum also varies by market: 41.3% for Australia and 39.6% for the US.

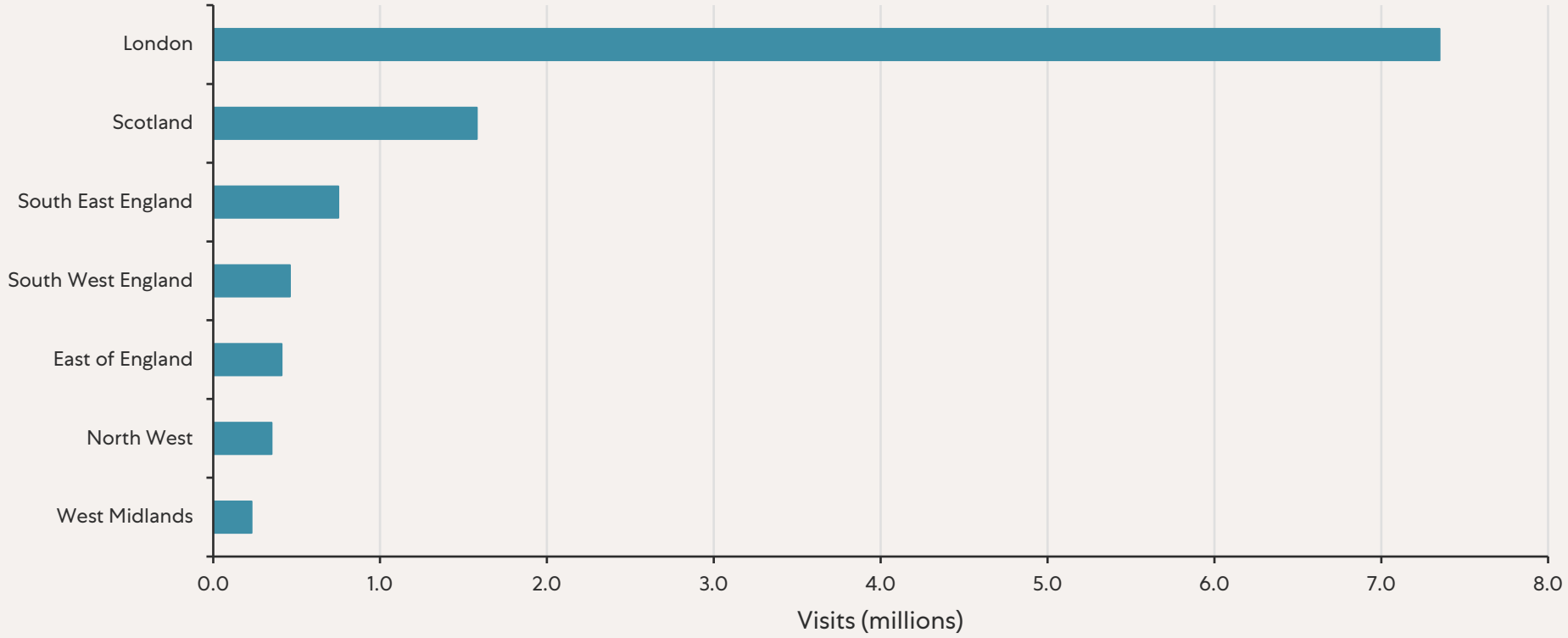
These figures cover museums across Britain, rather than the 15 national museums.

VisitBritain has flagged these estimates for revision.

# Where inbound museum visits happen



In the currently published 2024 data, London accounts for **7.35 million of the 11.82 million inbound visits that included a museum or gallery**, or 62% of the total.




Scotland has the highest museum participation rate, at 45.6% of inbound visits* and 61.9% of holiday visits.

These figures show where inbound museum visiting happens. They do not show the visitor mix at each of the 15 national museum groups.

VisitBritain has flagged these estimates for revision.

*Each visit counted once, in the region recorded in VisitBritain's regions data; VisitBritain's rate for visitors who stayed only in Scotland is 43%.

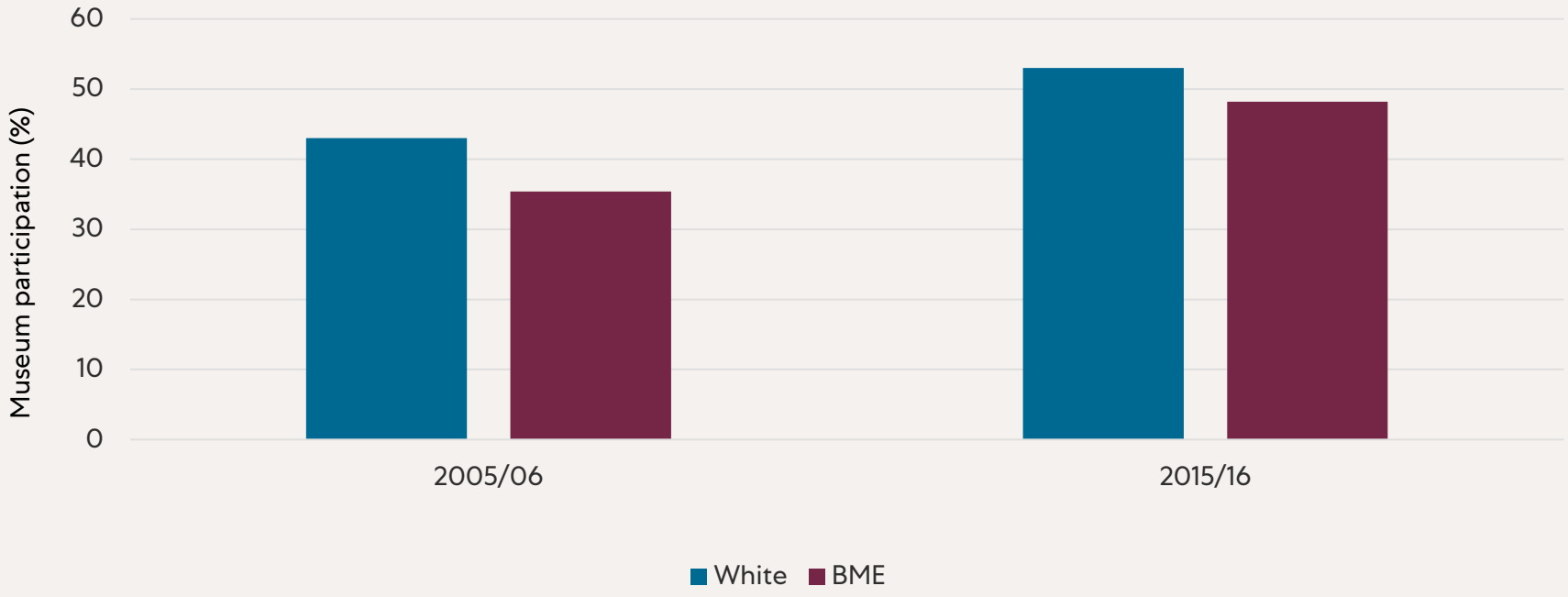
Inbound museum visits by region visited, millions, 2024. Source: [15] ONS International Passenger Survey 2024

# Who visits

# Museum participation by ethnicity, 2005/06 and 2015/16



Museum participation rose in both groups between 2005/06 and 2015/16, and the gap narrowed.




Participation among White adults rose from 43.0% to 53.1%.

Among the source's "BME" aggregate, it rose from 35.4% to 48.2%, a larger increase.

The gap narrowed from 7.6 percentage points to 4.9 points.

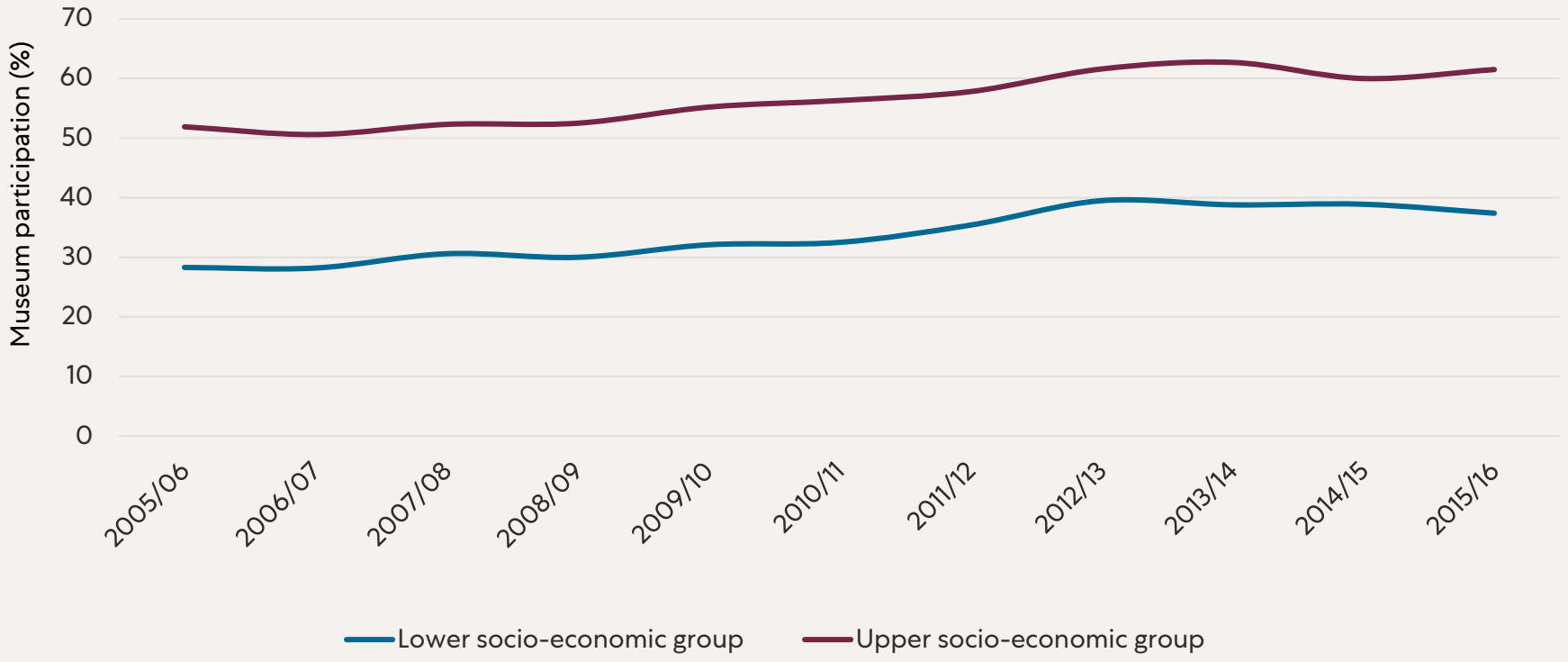
The source uses the historic term "BME". Later surveys report ethnicity differently, so these figures should not be extended into a continuous trend beyond 2015/16.

Museum and gallery participation by ethnicity, England, 2005/06 and 2015/16. Source: [3] Taking Part, focus on: diversity trends, 26 April 2017.

# Museum participation by socio-economic group



Museum participation rose in both socio-economic groups between 2005/06 and 2015/16, faster in proportional terms in the lower group, though the difference in percentage points was almost unchanged.




Participation among the lower socio-economic group rose from 28.3% to 37.4%, an increase of 9.1 percentage points.

Among the higher socio-economic group it rose from 51.9% to 61.5%, an increase of 9.6 points.

The difference in points was almost unchanged, but the lower group grew faster proportionally: from 55% of the higher group's rate to 61%.

These are participation rates across England. They do not describe the visitor mix at the 15 national museums or isolate the effect of free entry.

Museum and gallery participation by socio-economic group, England, 2005/06–2015/16. Source: [3] Taking Part, focus on: diversity trends, 26 April 2017.

# Social profile and visitor behaviour



In AIM's study, free and charging museums had similar social profiles.

| | Free admission visitors | Paid admission visitors | UK population |
|---|---|---|---|
| AB | 62% | 60% | 22% |
| C1 | 17% | 16% | 31% |
| C2 | 7% | 10% | 21% |
| DE | 13% | 15% | 26% |
| Visitors from the same county | 44% | 26% | — |
| Repeat visit rate | 39% | 31% | — |
| Visit lasting more than two hours | 21% | 45% | — |

Visitors in higher social grades were heavily overrepresented at both.

Free museums recorded more visitors from the local area and a higher repeat visit rate. Charging museums recorded longer visits.

These figures compare different museums. They do not show that removing a charge caused the differences.

AIM's visitor data come from small and medium-sized attractions, and its study excluded the national museums.

Social grade of museum visitors at free and paid admission sites, against the UK population. Figures may not sum to 100% due to rounding. Source: [4] AIM Taking Charge.

# Funding

# Funding and visits



1

### Total grant-in-aid is up

Real grant-in-aid rose from £395.8m in 1999/00 to £502.0m in 2024/25 at 2025/26 prices, an increase of 27%.

This includes capital. Almost all of the increase is capital: revenue grant-in-aid is 11% below its pre-pandemic average, while capital is around 150% above it.

2

### Visits rose faster

Visits rose 84% over the same period, from 22.8 million to 41.9 million.

3

### Grant-in-aid per visit is down

Real grant-in-aid per visit fell from £17.38 to £11.97, a fall of 31%.

4

### Revenue funding remains under pressure

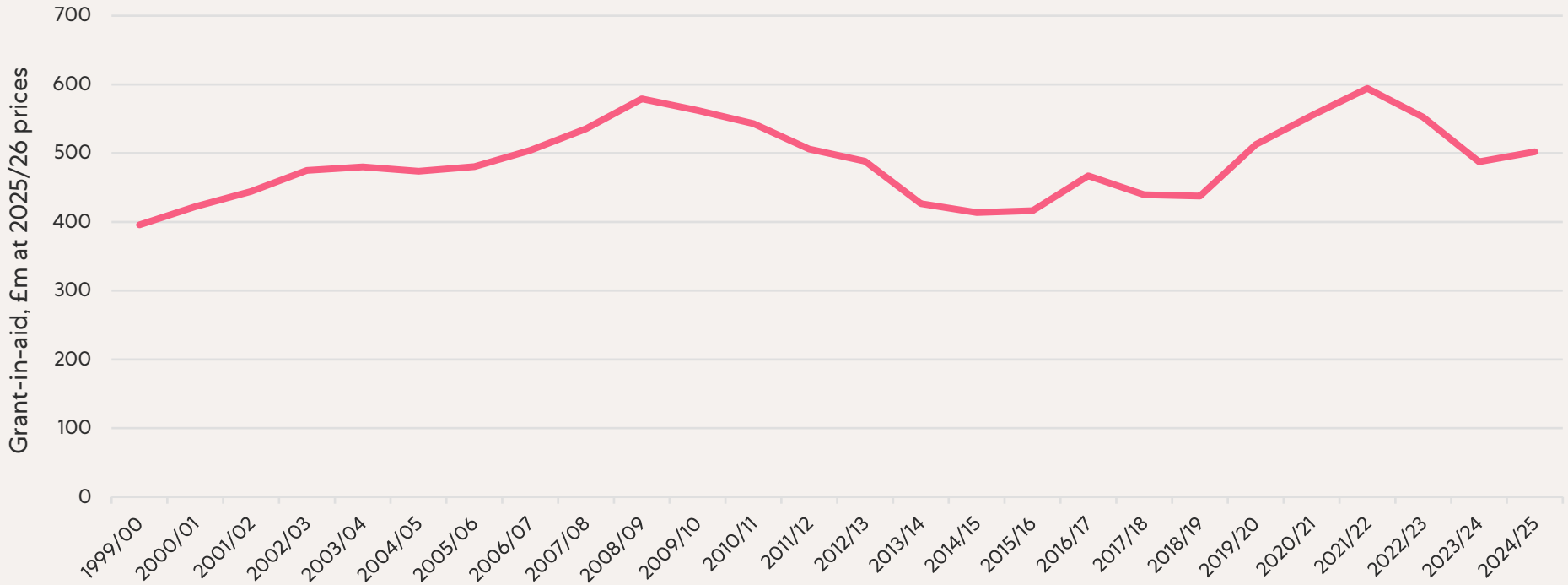
On the NAO's published real-terms series, revenue grant-in-aid fell from £375m in 2016/17 to £330m in 2024/25 (£388m to £341m at 2025/26 prices), 11% below its pre-pandemic average. Capital grant-in-aid rose from £75m to £154m (£78m to £159m).

Sources: [1] DCMS visit trends; [2] DCMS monthly visits; [5] NAO financial resilience; [6] HMT GDP deflators; [10] Commons Library arts funding; [11] DCMS museum income; [32] Hansard: Museums and Galleries, 17 November 2008. NAO figures as published, in 2024/25 prices; 2025/26 equivalents in brackets, using HM Treasury GDP deflators, June 2026.

# Grant-in-aid



Real grant-in-aid rose 27% over 25 years. It peaked at £579.0m in 2008/09, fell to £413.6m by 2014/15, and reached its highest level of £594.3m in 2021/22, during the pandemic.




All figures are adjusted for inflation to 2025/26 prices using HM Treasury GDP deflators. The size of any change depends on which start year is chosen.

The series ends at 2024/25 because grant-in-aid on a comparable basis has not yet been published for 2025/26.

This is total grant-in-aid, revenue and capital together. The series is consistent over the whole period: the pre-2008/09 Commons Library figures are also total grant-in-aid.

DCMS's Public Expenditure Core Tables [13] report net departmental spending on the museums, after their own income and including depreciation. They are not a measure of funding, so we have not used them.

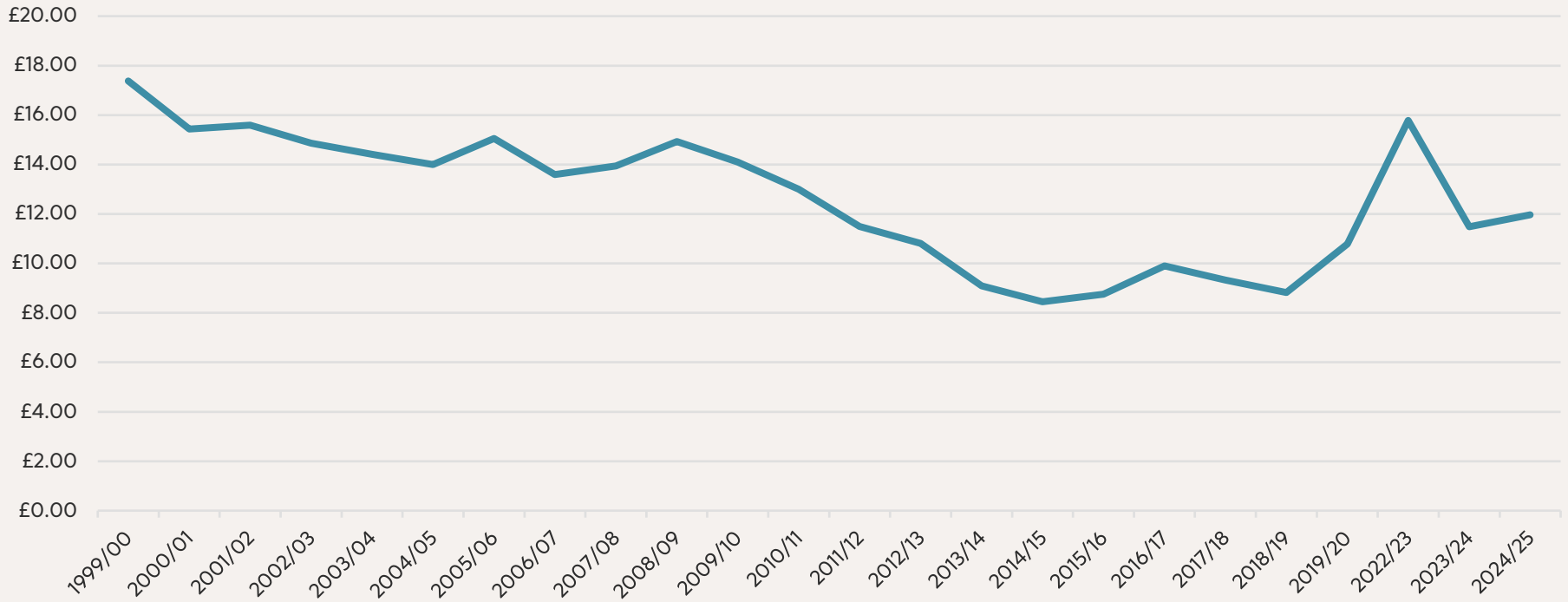
In millions at 2025/26 prices. Sources: [5] NAO financial resilience; [6] HMT GDP deflators; [10] Commons Library arts funding; [11] DCMS museum income; [13] DCMS Public Expenditure Core Tables.

# Grant-in-aid per visit has fallen by nearly a third



Funding per visit fell from £17.38 in 1999/00 to £11.97 in 2024/25, a fall of 31%, because visits rose 84% while grant-in-aid rose 27%. This is total grant-in-aid, including capital.

Using the NAO's separate real-terms revenue series, revenue grant-in-aid was about £7.87 per visit in 2024/25 (£8.14 at 2025/26 prices, comparable with the £11.97 above).



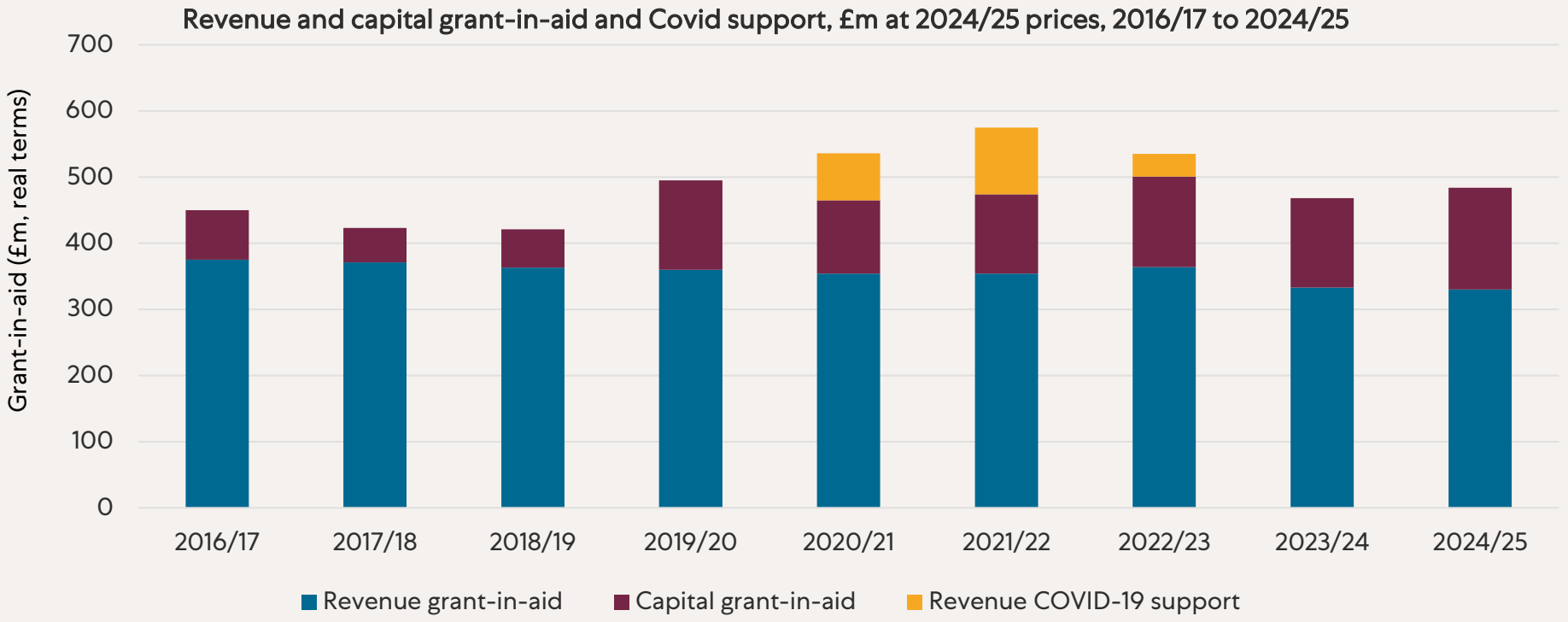

Grant-in-aid pays for collections, conservation, research and buildings as well as public opening, so this is not the cost of a visit. The high figure in 2022/23 reflects visits still recovering after the pandemic.

Real grant-in-aid per visit, £ at 2025/26 prices. The two pandemic years are excluded. Sources: [1] DCMS visit trends; [2] DCMS monthly visits; [5] NAO financial resilience; [6] HMT GDP deflators; [10] Commons Library arts funding; [11] DCMS museum income; [32] Hansard: Museums and Galleries, 17 November 2008.

# Revenue and capital grant-in-aid, 2016/17 to 2024/25



Revenue grant-in-aid is 11% below its pre-pandemic average in real terms. Capital grant-in-aid is around 150% above it.




Revenue grant-in-aid was £375m in 2016/17 and £330m in 2024/25 (£388m and £341m at 2025/26 prices), 11% below its pre-pandemic average of £370m (£382m).

Capital grant-in-aid rose from £75m to £154m (£78m to £159m), against a pre-pandemic average of £62m (£64m), and was 32% of total grant-in-aid in 2024/25, up from 17% in 2016/17.

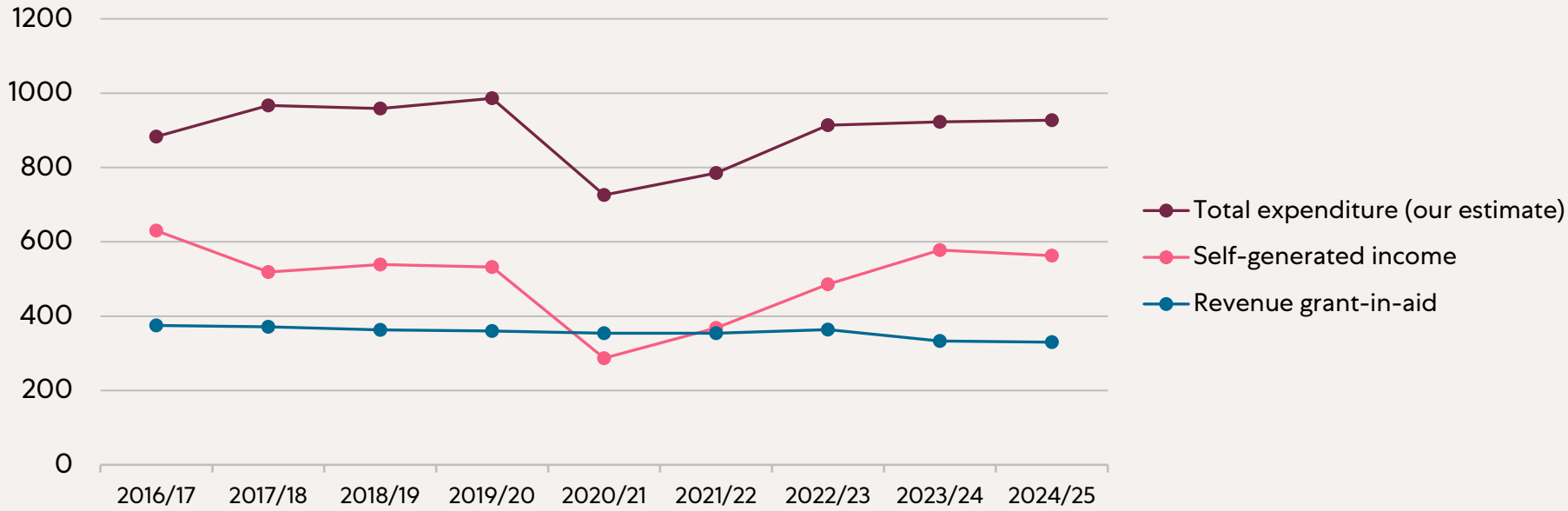
Covid support between 2020/21 and 2022/23 is shown separately and excluded from these comparisons.

NAO figures as published, in 2024/25 prices; 2025/26 equivalents in brackets, using HM Treasury GDP deflators, June 2026. Sources: [5] NAO financial resilience, Figure 3; [6] HMT GDP deflators.

# Revenue grant-in-aid covers about a third of running costs

Total expenditure across the 15 was about £927m in 2024/25 (£959m at 2025/26 prices). Revenue grant-in-aid was £330m (£341m) of that, 36%, down from 42% in 2016/17.

**Expenditure, revenue grant-in-aid and self-generated income, £m at 2024/25 prices, 2016/17 to 2024/25**




Expenditure in 2024/25 was 1% below its pre-pandemic average in real terms, while visits were 13% lower and revenue grant-in-aid 11% lower.

Self-generated income covers most of the difference, at £563m (£582m) in 2024/25.

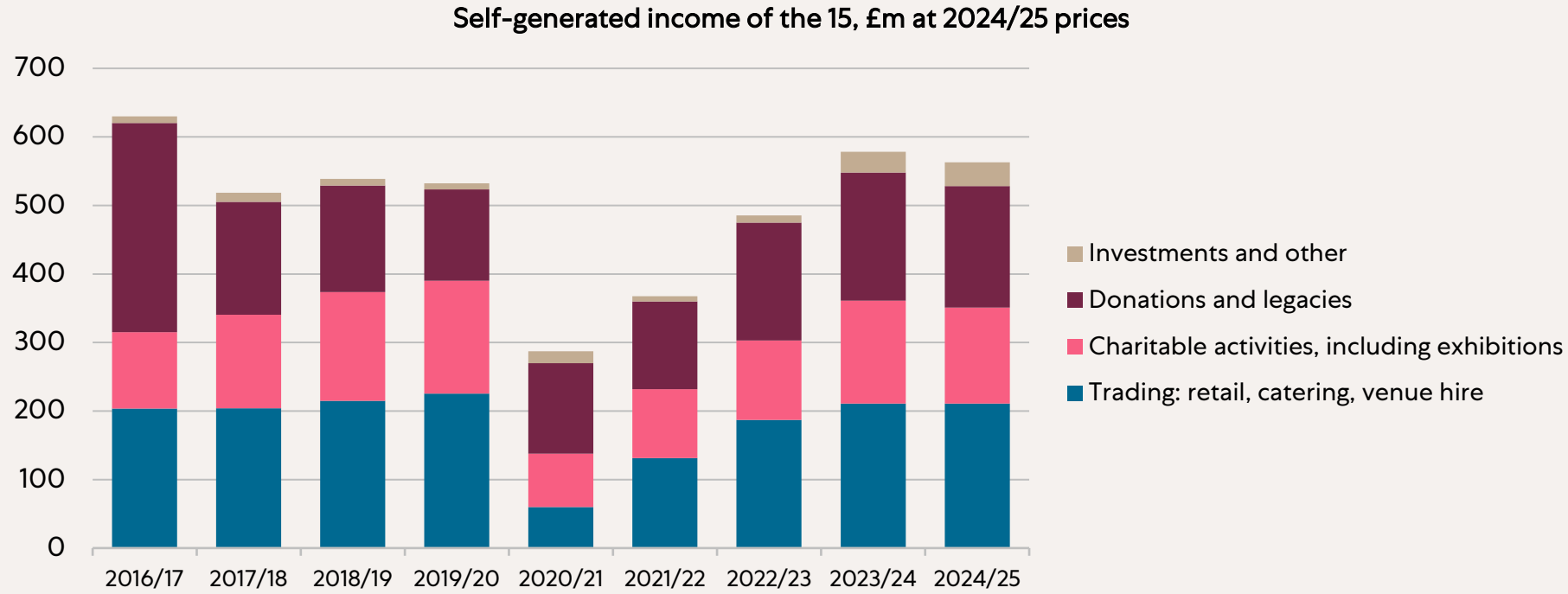
Grant-in-aid pays for collections, buildings, research and staff. It is not the cost of free entry.

Our series reproduces the NAO's published comparison of 2024/25 expenditure with the pre-pandemic average.

Our estimate: expenditure = grant-in-aid + self-generated income minus surplus, calculated from NAO Figures 3, 5 and 7, in real terms. Excludes other government funding, such as Heritage Fund grants and tax reliefs, and the value of donated assets. NAO figures as published, in 2024/25 prices; 2025/26 equivalents in brackets, using HM Treasury GDP deflators, June 2026. Sources: [5] NAO financial resilience, Figures 3, 5 and 7; [6] HMT GDP deflators.

# Earned income has held up while donations have fallen

The 15 museums generated £563m of their own income in 2024/25 (£582m at 2025/26 prices), level with the pre-pandemic average, against £330m (£341m) of revenue grant-in-aid.




Trading and exhibition income, which depends on people coming through the door, was £351m (£363m) in 2024/25, above its pre-pandemic average of £343m (£355m), despite visits being 13% lower.

Donations and legacies were £177m (£183m), well below the £305m (£316m) of 2016/17, which was an exceptional year.

Revenue grant-in-aid is 11% below its pre-pandemic average, at £330m (£341m).

Excludes the value of donated assets. Charitable activities include exhibition admissions and events. NAO figures as published, in 2024/25 prices; 2025/26 equivalents in brackets, using HM Treasury GDP deflators, June 2026. Sources: [5] NAO financial resilience, Figures 3 and 7; [6] HMT GDP deflators.

# Evidence on charging

# When museums changed admission charges



AIM found substantial falls at several museums introducing charges, while two examples saw visits rise after charges were removed.

AIM also records the income side. At York, the charge was financially very positive and retail spend per visitor more than doubled; Petersfield's income increased significantly; at Cyfarthfa, admissions income rose while donations fell.

| Museum | Charge | Before | After | Change |
|---|---|---|---|---|
| Cannon Hall | Nominal, mid-1990s | about 70,000 | under 18,000 | about −74% |
| Ceredigion Museum | £1, 1999 | close to 40,000 | around 15,000 | more than −60% |
| Cyfarthfa Castle | £1 then £2, 2014-15 | 89,000 | 53,000 | about −40% |
| Petersfield Museum | £2, 2015 | — | — | −35% |
| York Art Gallery | £7.50, 2015 | — | — | 40% below forecast |
| Elgin Museum | Charge removed, 2013 | — | — | almost doubled |
| Caldicot Castle | Charge removed, 2014 | — | — | footfall and income up |

AIM identified several museums where attendance fell after the introduction of a charge. The reported reductions ranged from 35% to more than 70%.

These were smaller museums with different local circumstances, so the results cannot be applied directly to national museums.

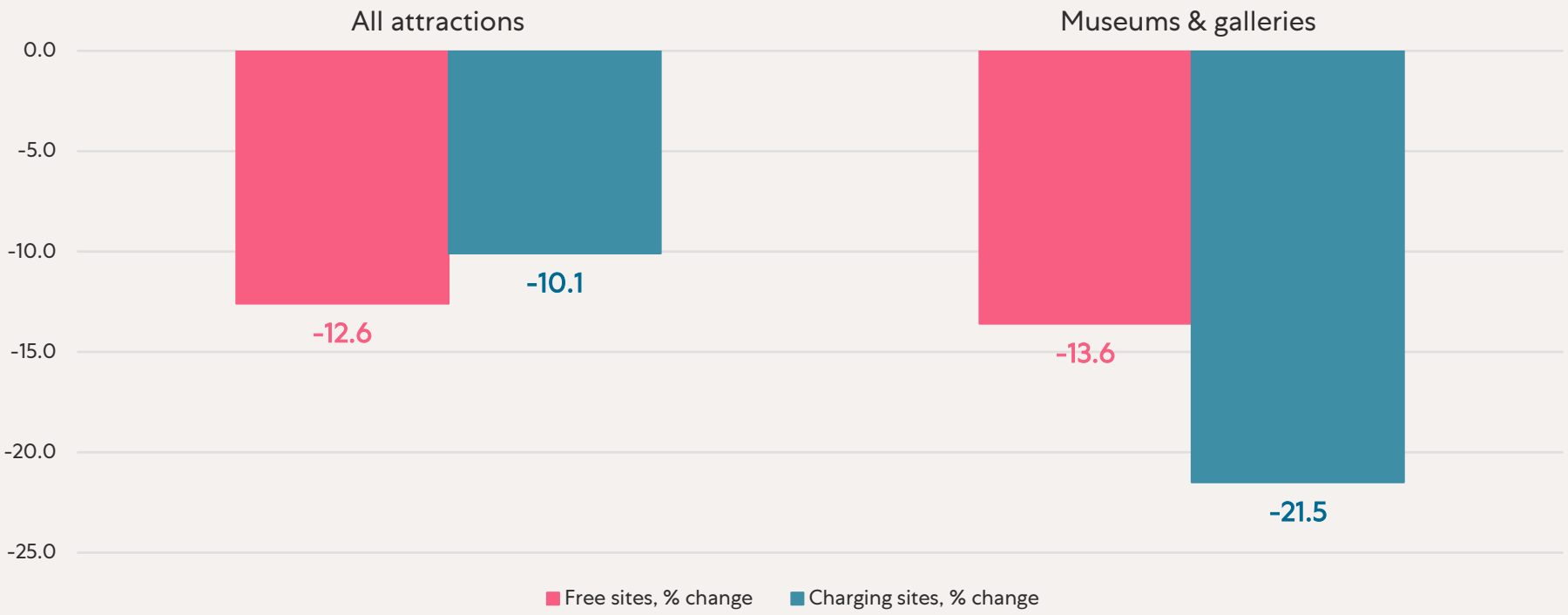
They show the risk of introducing a charge where there was none. AIM found less effect where museums already charged and raised their prices.

Source: [4] AIM Taking Charge.

# No statistically significant difference between free and charging attractions, 2019 to 2024



Change in visits between 2019 and 2024, %, English attractions.




663 English attractions with visit figures for both 2019 and 2024: 199 free, 464 charging.

All attractions: total visits to free sites fell 12.6% and to charging sites 10.1%. The difference is not statistically significant (p = 0.196).

Museums and galleries (140 free, 69 charging): total visits fell 13.6% at free sites and 21.5% at charging sites. Compared site by site (Mann–Whitney test), the median free museum fell 8% and the median charging museum 12%; the difference is not statistically significant (p = 0.467). The charging total is heavily affected by the Royal Academy; without it, both groups fell by about 14%.

This compares different attractions over the same period. The 2001 analysis compares the same museums before and after they changed their own policy, so the two are different tests.

Sources: Baker Richards analysis of [33] VisitEngland full listing of attractions 2024; [27] VisitEngland Annual Attractions Survey 2024.

# Public attitudes



72%

say some revenue from a potential tourist tax should be used to help keep national museums free to enter for all.

76%

say government should maintain or increase funding for national museums.

41%

of Britons visit a national museum at least once a year.

49%

of people who struggle to make ends meet always carry ID, relevant to any charge that depends on proving residence.

Polling tells us what people say when asked. It does not show how visitors would behave if charges were introduced, or what trade-offs they would accept. Polling commissioned by Art Fund from More in Common, over 2,000 UK adults, March 2026. Sources: [14] Art Fund public attitudes research, 26 March 2026; [36] Art Fund written evidence to the PAC, FRG0005.

# What we would do next



## International visitor polling

Motivation, awareness of free entry, willingness to pay and likely behaviour under different charging models, focused on the largest markets for inbound museum visits in 2024.

## Data from the 15 groups

Overseas share by market, UK and local resident share, dwell time and spend per visit by visitor origin.

## Strengthen the pre-2001 baseline

Bring together the earlier Travers series and any additional DCMS data to give a longer view of attendance before universal free entry.

Sources: [15] ONS International Passenger Survey 2024; [23] Travers 2006; [25] Strategic Review of DCMS museums.

# Appendix

# The twelve questions in the brief, 1 to 7



## Three questions answered in full, five in part, and four that cannot be answered as asked

| | Question | Where we are |
|---|---|---|
| 1 | Update the 10th anniversary figures | Mostly. Three of the five figures in the 2011 release can be updated, and one restated on a different basis. |
| 2 | Top UK attractions that are national museums | Answered. Six of ALVA's top ten in 2025 are free national museums. See slide 11. |
| 3, 7 | Economic benefit to tourism | Cannot be answered as asked. No robust source identified measures the incremental tourism revenue attributable to museums. |
| 4 | Overall and international visitor numbers | Answered, with overseas share from 2008/09. See slides 8 and 13. |
| 5 | Diversity of visitor demographics | Partly, on a different basis. The national-museum-specific demographic series ends in 2012/13; broader England-wide participation data continue. Under-16 visits are recorded from 2008/09 only. |
| 6 | Economic benefit of government subsidy | Not as asked. We have the cost, not the benefit. |

Detail on each is in the accompanying written update.

Sources for every figure are listed at the end of the deck.

Sources: [3] Taking Part diversity trends; [7] DCMS annual indicators; [21] Ten years of free museums; [22] ALVA 2025 visitor figures.

# The twelve questions in the brief, 8 to 12



Of questions 8 to 12, one is answered in full, three in part and one cannot be answered from existing data. Across the brief, new research would be needed for questions 3, 6, 7, 8, 10 and 11.

| | Question | Where we are |
|---|---|---|
| 8 | Visitors citing culture as a reason to visit | Cannot be answered from existing data. Needs polling. |
| 9 | Multi-site visiting because of free entry | Not causally, but there is relevant data. See slide 37. |
| 10 | Secondary spend | Sector totals only. No comparable published secondary-spend figure per visitor identified. See slides 28 and 37. |
| 11 | Dwell time | Only at national level. Not published for any of the 15. See slide 37. |
| 12 | Changes in grant-in-aid over 25 years | Answered. A continuous real-terms series now exists. |

# Visitor behaviour and spend



Published data answers three of the brief's questions in part.

| Question | What the data shows | Source |
|---|---|---|
| **Visiting more than one place** | Inbound visitors who went to more than one UK region: 47.7% visited a museum, against 31.5% of single-region visitors. Among multi-region holiday visitors, 61.6%. | [15] IPS 2024 |
| **Dwell time** | 44% of museum visitors in England stay one to two hours and 36% two to four hours. 1.8% stay under 30 minutes. | [31] Participation Survey 2024/25 |
| **Short visits, free and paid** | Visits under 30 minutes: 10% at free museums, 2% at paid. Visits over two hours: 21% at free museums, 45% at paid. | [4] AIM Taking Charge |
| **Secondary spend** | Self-generated income across the 15 was £563m in 2024/25. No figure per visitor, or UK and overseas split, is published. | [5] NAO financial resilience |

Museum-going is linked with visiting more of the UK. The data does not show that free entry causes it.

AIM concluded that charging mainly stops short, casual visits, so average visit length rises.

A multi-region visit is an inbound visit with overnight stays in more than one UK nation or region. Base: inbound visits to Great Britain, 2024. Sources: [4] AIM Taking Charge; [5] NAO financial resilience; [15] International Passenger Survey 2024; [31] DCMS Participation Survey 2024/25.

# Method



How this report was built, and how each element was checked.

| Element | What we did | How it was checked |
|---|---|---|
| Visitor series | Rebuilt for the 15, 1999/00 to June 2026, from the DCMS attendance series and monthly visits data | Annual and monthly series agree to within 0.2% where they overlap |
| Funding series | Built from DCMS income statistics for 2008/09 onwards and House of Commons Library data before, deflated to 2025/26 prices. Total grant-in-aid, revenue and capital, on a consistent basis throughout. | Matches the NAO across all nine published years to within 1%; 2024/25 matches the PAC figure to within 0.25% |
| Tourism data | Museum visiting extracted from 435,949 International Passenger Survey records | Matched VisitBritain's published detailed 2024 activity totals at the time of analysis. VisitBritain now flags those estimates as awaiting revision following the September 2026 ONS correction. |
| Attractions data | 663 English attractions with figures for both 2019 and 2024 | Tested whether the difference between free and charging sites was larger than chance variation. It was not. |
| Charging evidence | From AIM Taking Charge final report | Case figures taken directly from the report. |
| Figures not used | Three figures in general circulation | Two traced and found narrower than their use implies. One could not be verified. |

The wider review covered 78 sources: 58 read at first hand, 16 accessed through other reports and 4 that could not be obtained. The sources cited in this deck are listed at the end.

Sources: [4] AIM Taking Charge; [5] NAO financial resilience; [9] PAC oral evidence; [15] International Passenger Survey 2024; [33] VisitEngland full listing of attractions 2024.

# The 2011 anniversary figures, updated



The DCMS release of 29 November 2011 contains five figures. Three can be updated, one can only be restated on a different basis, and one cannot be restated.

| What DCMS said in 2011 | Where it stands now |
|---|---|
| Eight of ALVA's top ten UK visitor attractions are free national museums | Six of ALVA's top ten in 2025 are free national museums (Baker Richards analysis of ALVA data). |
| Around 18 million visits to museums that used to charge | 23.05m in 2024/25 for the seven museum groups. DCMS's 18m was the 2010/11 level for the sites that dropped charges, a narrower count. On our basis the 2010/11 figure is 20.44m, so visits have risen 12.8% since the tenth anniversary. Excluding the White Tower, fully counted only from 2011/12, the rise is 4.5%. |
| 151% growth in London and 148% outside London for formerly charging museums | Not comparable. DCMS measured 2000/01 to 2010/11 for the individual sites that dropped charges. For the seven museum groups as now constituted, visits grew 115% over the same decade and 143% from 2000/01 to 2024/25 (or 123% excluding the White Tower). Our split by location starts in 2004/05. |
| Museums that were always free rose 22% | Over the same decade (2000/01 to 2010/11) our series gives 19.4%, close to DCMS's 22%. The difference is the set of museums covered. To 2024/25, visits are up 5.7% from 2000/01 and 40.9% from 1999/00. The difference is mainly Tate Modern, which opened in May 2000. |
| £1bn a year from overseas visitors | Traced to VisitBritain's Foresight issue 83 (September 2010), an estimate of 2009 inbound visitor spending linked to museums and galleries. It has not been updated and does not measure spending caused by museums. |

Two other figures often linked to the anniversary, on visits by people on lower incomes and on the benefit per pound of subsidy, are not in the release.

All three DCMS percentages run from 2000/01, which is not a pre-policy year: children had been free since April 1999 and over-60s since April 2000. Tate Modern opened free on 1 May 2000, within the base year for the always-free group. DCMS's 2010/11 figures also covered a different set of museums, including Tyne & Wear Archives & Museums and the National Coal Mining Museum, and counted the Museum of Science and Industry separately.

Sources: [1] DCMS visit trends; [2] DCMS monthly visits; [21] Ten years of free museums; [22] ALVA 2025 visitor figures; [32] Hansard: Museums and Galleries, 17 November 2008; [37] VisitBritain Foresight 83, via NMDC Museums and Tourism briefing.

# What the comparison cannot separate



### It does not isolate free entry

Three major capital projects in the period, Tate Modern, the Great Court and the Ondaatje Wing, were all at already-free museums.

The formerly charging museums also invested, for example in the V&A's British Galleries, which opened in November 2001.

### It rests on an assumption

The comparison assumes that the already-free eight show what would have happened to the other seven without free entry.

### Results varied by museum

In the first five years after each museum's charges ended, visits changed by between +138% at National Museums Liverpool and +2% at the Royal Armouries, an average of 83%.

Four already-free museums recorded falls over the same period, including the National Gallery, down 13%.

### A limitation of the series

The main series starts in 1999/00, when children already had free entry. It is the only full year before free entry for over-60s and everyone else.

Travers (2006) gives some earlier figures for individual museums, but not a full comparable baseline for all 15.

Sources: [1] DCMS visit trends; [8] Caring for our Collections; [23] Travers 2006; [24] DCMS free-entry evidence.

# An illustrative calculation



## 8.0-9.9 million

More visits in 2024/25 than the illustrative comparison suggests.*

If the formerly charging museums had grown at the same rate as those already free, they would have received 13.19 million visits in 2024/25. They received 23.05 million, or 21.22 million excluding Royal Armouries White Tower visits, which were fully counted only from 2011/12.

## c£50 million

Per year.

The £140 million provided to compensate museums for free entry between 2000/01 and 2004/05 is equivalent to about £50 million a year at 2025/26 prices, spread evenly across the five years.

As a separate check, Hansard records DCMS's running cost of free admission rising from £4.2m in 1999/00 to £29.3m in 2003/04.

## £11.97

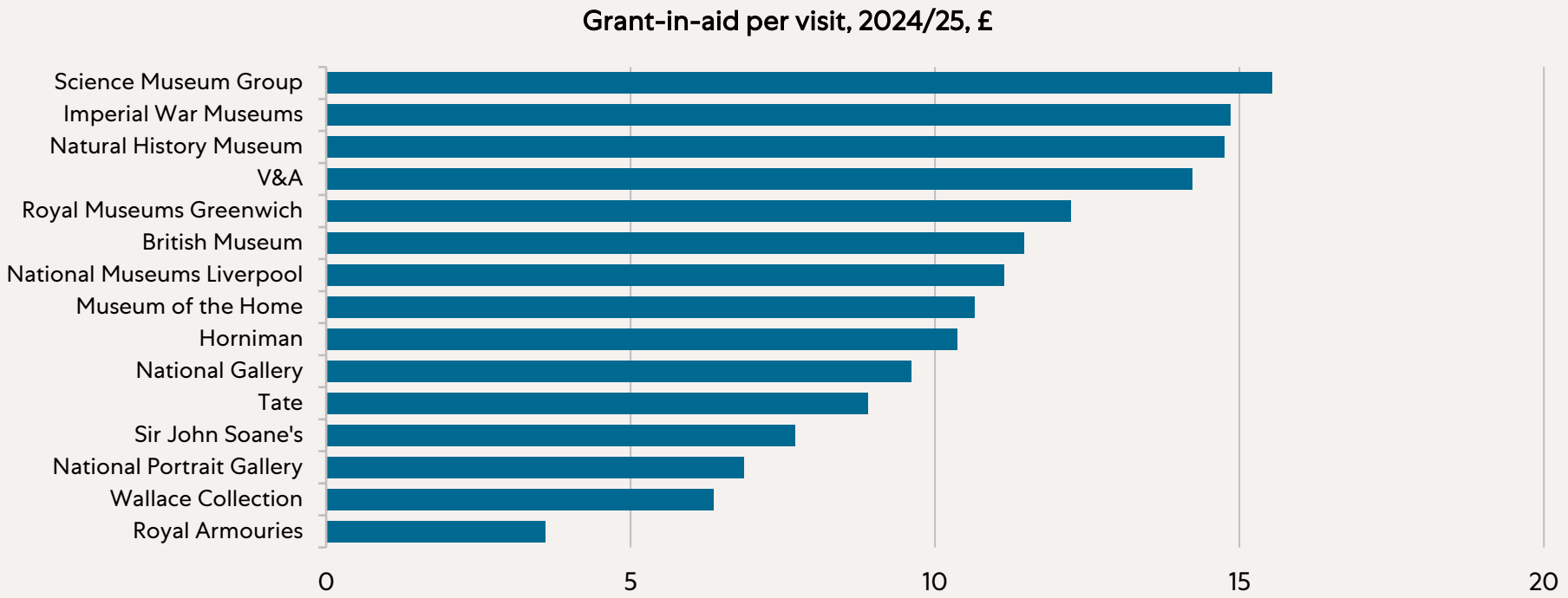
Grant-in-aid per visit in 2024/25.

Grant per visit covers collections, conservation, research and buildings, and is not the cost of free entry.

*The range depends on whether Royal Armouries White Tower visits, fully counted only from 2011/12, are included. The comparison does not isolate the effect of free entry (slide 40). Sources: [1] DCMS visit trends; [2] DCMS monthly visits; [6] HMT GDP deflators; [8] Caring for our Collections; [11] DCMS museum income; [12] Hansard: Museums and Galleries, 3 March 2003; [32] Hansard: Museums and Galleries, 17 November 2008.

# Grant-in-aid per visit varies more than fourfold

Grant-in-aid per visit in 2024/25 ranged from £3.59 at the Royal Armouries to £15.54 at the Science Museum Group (£3.71 and £16.08 at 2025/26 prices). The average was £11.55 (£11.95).




National Portrait Gallery exhibition income rose from £1.6m in 2018/19 to £5.5m in 2024/25, with the collection still free. The gallery reopened in June 2023 after a three-year redevelopment.

Imperial War Museums earns £11.30 a visit from admissions and trading. Admissions (£18.9m) come mainly from its three charging sites, Duxford, the Churchill War Rooms and HMS Belfast; trading profit (£6.4m) comes from shops, catering, hospitality and the Duxford air shows.

The Royal Armouries figure is low partly because its visits include the White Tower.

Grant-in-aid per visit is 2024/25 cash grant-in-aid as reported by the NAO (Figure 13), including capital, divided by 2024/25 visits; 2025/26 equivalents in brackets. The £11.97 on slides 4, 23 and 25 uses DCMS's total of £485.2m rather than the NAO's £484m. Earned income is admissions plus trading net profit. Sources: [5] NAO financial resilience, Figure 13; [6] HMT GDP deflators; [7] DCMS annual performance indicators 2024/25; [11] DCMS museum income; [34] IWM Annual Report and Accounts 2024-25; [35] NPG Annual Report and Accounts 2024-25.

# Inbound museum visiting by market, 2024



Britain as a whole, not the 15.

Visits in thousands. Participation is the share of each market's visits that included a museum or gallery. IPS sample is the number of survey responses.

| Market | Visits (000) | Share | Cumulative | Participation | IPS sample |
|---|---|---|---|---|---|
| USA | 2,209 | 18.7% | 18.7% | 39.6% | 2,633 |
| France | 1,166 | 9.9% | 28.6% | 32.3% | 1,328 |
| Germany | 1,073 | 9.1% | 37.6% | 32.1% | 1,092 |
| Spain | 745 | 6.3% | 44.0% | 29.1% | 639 |
| Italy | 697 | 5.9% | 49.9% | 37.2% | 555 |
| Netherlands | 580 | 4.9% | 54.8% | 29.5% | 704 |
| Australia | 506 | 4.3% | 59.0% | 41.3% | 615 |
| Irish Republic | 340 | 2.9% | 61.9% | 11.6% | 391 |
| Canada | 325 | 2.8% | 64.7% | 34.5% | 345 |
| Poland | 301 | 2.5% | 67.2% | 20.8% | 236 |
| Belgium | 295 | 2.5% | 69.7% | 33.8% | 408 |
| Switzerland | 223 | 1.9% | 71.6% | 26.2% | 255 |
| Denmark | 198 | 1.7% | 73.3% | 30.1% | 174 |
| China | 187 | 1.6% | 74.9% | 40.3% | 138 |
| India | 187 | 1.6% | 76.4% | 31.0% | 161 |
| Brazil | 147 | 1.2% | 77.7% | 47.3% | 159 |

Seven markets account for 59% of all inbound museum visits, and sixteen for 78%.

Sample sizes vary widely. The USA has 2,633 IPS responses and China 138, so figures for smaller markets are less reliable.

These estimates use the version of the 2024 IPS available when the analysis was undertaken and are awaiting revision following ONS's September 2026 correction.

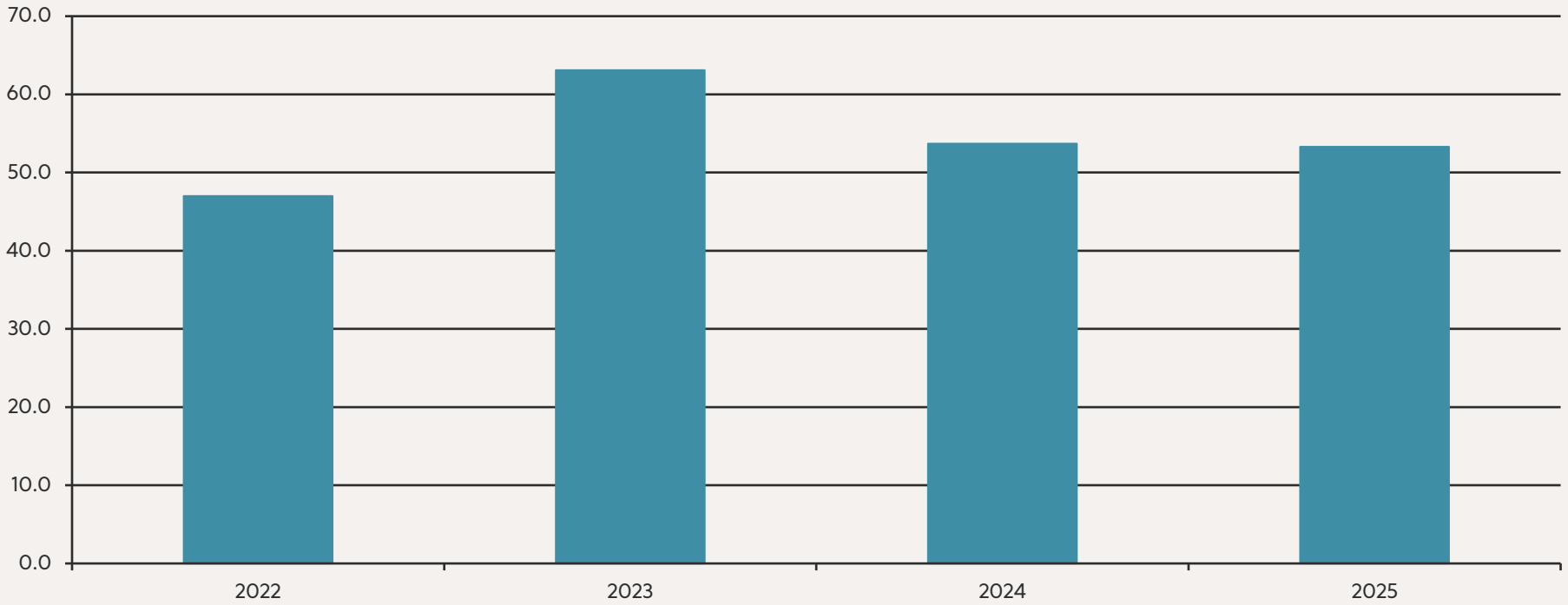
Source: [15] Baker Richards analysis of the International Passenger Survey 2024.

# Domestic cultural day visits fell from a 2023 high



Cultural day visits fell from 63.1m in 2023 to 53.3m in 2025, down 15.6%, against a fall of 8.5% in all England day visits.

2023 was an unusually high year. The 2025 figure is still above 2022 (47.0m).




The category records the main activity on the day visit. It should not be read as the reason the trip was taken.

The GB Tourism Survey is published as official statistics in development, meaning the methods are still being tested.

Figures are leisure day visits of three hours or more with England as the destination, classified by main activity.

On the narrower tourism day visit definition, the fall is about 20%.

England day visits where the main activity was arts, culture or entertainment, millions. The category includes cinema. GBTS also lists museums as an example in its separate visitor-attraction category, so this series does not capture all museum day trips. Source: [20] VisitBritain domestic tourism 2025.

# UK examples of charging decisions



**Brighton Museum, charging non-residents from May 2015**

Brighton Museum began charging non-residents in May 2015 while retaining free entry for local residents.

AIM reported that visits fell markedly and by more than the museum had expected. Visitors who continued to attend stayed longer and spent more per person.

Brighton found that although residents still went free, the perception that the museum now charged affected visitor numbers. The museum believed that some residents had acquired the impression that everyone now had to pay.

Brighton charged all non-residents, including UK visitors from outside the area. It provides relevant evidence about differential charging, rather than an exact test of charging international visitors.

**Derby Museums and Cannon Hall**

Derby Museums investigated charging at Pickford's House, which has 20,000 visitors a year. Business planning suggested a net income increase of about £19,000.

The Trust judged it not worth pursuing.

At Cannon Hall, visits to the surrounding park stayed stable while museum visits fell, suggesting the charge itself was the barrier.

Source: [4] AIM Taking Charge.

# Some national museum group sites already charge



The NAO counted 43 visitor sites in March 2026, seven of which were wholly charging.

| Institution | Sites | In London | Charging |
|---|---|---|---|
| British Museum | 1 | 1 | 0 |
| Horniman Museum and Gardens | 1 | 1 | 0 |
| Imperial War Museums | 5 | 3 | 3 |
| Museum of the Home | 1 | 1 | 0 |
| National Gallery | 1 | 1 | 0 |
| National Museums Liverpool | 7 | 0 | 0 |
| National Portrait Gallery | 1 | 1 | 0 |
| Natural History Museum | 2 | 1 | 0 |
| Royal Armouries | 3 | 1 | 1 |
| Royal Museums Greenwich | 4 | 4 | 2 |
| Science Museum Group | 6 | 1 | 0 |
| Sir John Soane's | 1 | 1 | 0 |
| Tate | 4 | 2 | 1 |
| V&A | 5 | 3 | 0 |
| Wallace Collection | 1 | 1 | 0 |
| Total | 43 | 22 | 7 |

The NAO counts V&A Dundee as a V&A site though it is a separate charity. V&A East Museum is not in the 43, having opened after the NAO reported. Barbara Hepworth is not counted separately from Tate St Ives. Swindon counts as an SMG site but not a charging one.

Source: [5] NAO financial resilience.

# Free entry rests mainly on a condition of grant



Free entry rests on a condition of grant that applies to all 15. The NAO confirmed in March 2026 that free access to permanent collections remains a DCMS priority. Because it is a condition of grant, DCMS and the Treasury could change it without Parliament. Some museums' founding legislation may also require free access; we have not checked all 15 (see next slide).

**The condition of grant**

In 2003 the government said that a museum funded to provide free access that chose not to could expect to lose that funding.

**The VAT refund**

The section 33A refund, which lets the museums reclaim VAT on costs attributable to free admission, is available only where entry to the main collections is free. Charging for special exhibitions is allowed.

So charging would bring in ticket income but lose the VAT refund.

This is not legal advice.

**Paragraph 18.3**

The framework documents require DCMS approval, and Treasury approval where appropriate, before any change of policy or practice with wider financial implications that might prove repercussive.

This suggests DCMS and the Treasury could decide on charging without needing Parliament.

Sources: [5] NAO financial resilience; [28] Cm 5772; [29] British Museum framework document 2025 to 2028; [30] HMRC VAT Notice 998.

# What the statutes say



### What we have read

The NAO lists the founding legislation for each of the 15. We have read three: the Museums and Galleries Act 1992 for the National Gallery, the National Heritage Act 1983 for the Science Museum Group, and the Merseyside Museums and Galleries Order 1986 for National Museums Liverpool. All three require the collections to be exhibited to the public. None says exhibited free.

### What we have not read

The founding legislation of the other nine statutory museums, and the governing documents of the three registered charities (the Horniman, the Museum of the Home and Sir John Soane's). The Strategic Review says some legislation requires free access, without naming which museums.

### Our reading

A condition of grant applies to all 15. Some museums may also have a legal duty to provide free access, and we do not yet know which. So we cannot say that free entry is never a statutory duty.

Sources: [5] NAO financial resilience, Appendix Two; [25] Strategic Review of DCMS-sponsored museums.

# Sources

# Sources



**Sources 1 - 10**

**[1]** Department for Culture, Media and Sport, DCMS Sponsored Museum Visit Trends: An analysis of factors impacting on visits to DCMS Sponsored Museums, 22 September 2020.

DCMS Sponsored Museum Visit Trends

**[2]** Department for Culture, Media and Sport, Museums and galleries monthly visits, updated 3 September 2026 (Note that its headline total includes National Coal Mining Museum, which is not one of the 15 in our analysis).

Museums and galleries monthly visits

**[3]** Department for Culture, Media and Sport, Taking Part, focus on: diversity trends, 26 April 2017.

Taking Part: diversity trends

**[4]** DC Research for the Association of Independent Museums, Taking Charge: Evaluating the Evidence: The Impact of Charging or Not for Admissions on Museums, August 2016.

AIM Taking Charge

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NAO financial resilience report

**[6]** HM Treasury, GDP deflators at market prices, and money GDP June 2026 (Quarterly National Accounts), 30 June 2026.

HM Treasury GDP deflators

**[7]** Department for Culture, Media and Sport, DCMS-sponsored Museums and Galleries Annual Performance Indicators 2024/25, 23 April 2026, updated 29 April 2026.

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Caring for our Collections

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**[10]** House of Commons Library, Arts Funding: Statistics, CBP-7655, 13 July 2016.

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**Sources 11 - 21**

**[11]** Department for Culture, Media and Sport, Total Income of DCMS-funded cultural organisations, statistical series.

DCMS cultural organisations income series

**[12]** House of Commons Hansard, Museums and Galleries, written answer, 3 March 2003.

Hansard: Museums and Galleries, 3 March 2003

**[13]** Department for Culture, Media and Sport, DCMS Annual Report and Accounts 2025 to 2026, including Public Expenditure Core Tables, 15 July 2026, updated 20 August 2026.

DCMS Annual Report and Public Expenditure Core Tables

**[14]** Art Fund, Public backs using tourist levy to keep national museums free for all, 26 March 2026. Polling by More in Common of over 2,000 UK adults, March 2026.

Art Fund public attitudes research

**[15]** Office for National Statistics, International Passenger Survey 2024, UK Data Service Study 9465. Baker Richards analysis of microdata.

International Passenger Survey 2024

**[16]** Office for National Statistics, Travel trends: 2023, 17 May 2024. Corrected 13 March 2025

ONS Travel trends: 2023

**[17]** Office for National Statistics, Overseas travel and tourism: 2020, 24 May 2021.

ONS Overseas travel and tourism: 2020

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