

Culture and Communities Committee

10am, Tuesday, 30 January 2018

Update on Museums and Galleries Transformation – Opening Hours

Item number	8.2
Report number	
Executive/routine	
Wards	All
Council Commitments	46

Executive Summary

On the 1 October 2016 the Museums and Galleries Service implemented a change to opening hours to six of its museums and galleries in response to the Council's Transformation programme, moving from a six and seven day a week operation to five days a week throughout the year.

It was agreed to review the new opening hours after one year of operation. This report details the findings of the review and the impact the new hours have had on visitor numbers, income and the visitor experience.

It is proposed to convene two review meetings with Councillor and officer representation to consider options for future opening hours across the museums and galleries service.

Update on Museums and Galleries Transformation – Opening Hours

1. Recommendations

- 1.1 Committee is asked to:
 - 1.1.1 note the findings of the review and the impact the new hours have had on visitor numbers, income and the visitor experience;
 - 1.1.2 convene two review meetings with Councillor and officer representation to consider options for the future opening hours across the museums and galleries service; and
 - 1.1.3 bring a report to the 20 March Culture and Communities Committee on the proposed future opening hours for museums and galleries.

2. Background

- 2.1 The Museums and Galleries Service operates 14 'A' and 'B' listed venues across Edinburgh, welcoming over 800,000 visitors a year (See Appendix 1). The service generates an annual income of over £900,000 despite the majority of the venues being free at the point of access. The collections number over 220,000, many of which are designated by the Scottish Government as being of national significance.
- 2.2 The gross annual budget for the service is £2,233,160 with a net budget of £1,309,244, representing approximately 0.19% of the Council's revenue budget.
- 2.3 In response to the Council's Transformation programme in 2015/16 and following staff and Trade Union consultation, the Culture service implemented a change to opening hours to six of its museums and galleries, moving from a six and seven days a week service to five days a week throughout the year. The new opening hours went live on 1 October 2016 on the basis that a review of the new operating model would take place after one year.
- 2.4 The change to opening hours has resulted in a staff cost saving of £82,000 in 2016/17, with a further £84,000 in 2017/18 – a total saving of £166,000 as set out in the Transformation programme.
- 2.5 A review of the impact of these changes was undertaken in October 2017, one year after the introduction. The review assessed the impact on visitor numbers and income, as well as the impact on the visitor experience and the staff working within the venues.

2.6 Opening hours implemented on 1 October 2016:

Venue	Days Open	Hours of Opening	Days Closed
City Art Centre	Wednesday Thursday Friday Saturday Sunday	10am-5pm 10am-5pm 10am-5pm 10am-5pm 12noon-5pm	Monday Tuesday
Writers Museum	Wednesday Thursday Friday Saturday Sunday	10am-5pm 10am-5pm 10am-5pm 10am-5pm 12noon-5pm	Monday Tuesday
People's Story Museum	Wednesday Thursday Friday Saturday Sunday	10am-5pm 10am-5pm 10am-5pm 10am-5pm 12noon-5pm	Monday Tuesday
Museum of Childhood	Thursday Friday Saturday Sunday Monday	10am-5pm 10am-5pm 10am-5pm 12noon-5pm 10am-5pm	Tuesday Wednesday
Museum of Edinburgh	Thursday Friday Saturday Sunday Monday	10am-5pm 10am-5pm 10am-5pm 12noon-5pm 10am-5pm	Tuesday Wednesday
Queensferry Museum	Thursday Friday Saturday Sunday Monday	10am-5pm 10am-5pm 10am-5pm 12noon-5pm 10am-5pm	Tuesday Wednesday

2.7 There was no change to the opening hours of the Scott and Nelson Monuments.

3. Main report

Impact of the Changes to Opening Hours on Visitor Numbers

- 3.1 Overall, there has been a 21% decline in visitor numbers across five venues: Museum of Edinburgh, People's Story, Museum of Childhood, City Art Centre and the Writers' Museum. At Queensferry visitor numbers are considerably lower than any other site, averaging approximately 400 visitors per month in 2016/17.

Visitor Numbers	2015/16	2016/17	Variation	%
Five City Centre Venues	487,398	386,584	-100,814	21%

- 3.2 Visitor numbers were stable across the five venues before Transformation, although there was a slight decline in numbers between 2014/15 and 2015/16 of 0.3% - from 488,783 in 2014/15 to 487,318 in 2015/16, a decline of 1,465 visitors.
- 3.3 The decline in numbers from 0.3% to 21% does, however, show that the reduction in opening hours has had a significant impact on visitor numbers across the venues.

Venue	2015/16	2016/17	Variation	%
Museum of Childhood	216,195	156,669	-59,526	-28%
Museum of Edinburgh	84,873	73,746	-11,127	- 13%
People's Story	58,025	48,810	-9,215	-16%
City Art Centre	71,246	48,516	-22,730	-32%
Writers' Museum	58,843	57,059	+1,784	+3%

- 3.4 Of all the venues, only the Writers' Museum saw an increase in visitor numbers. During 2014/15 there was investment in the venue - a change in the layout of the ground floor gallery, with a relocated and expanded retail offer which allowed a more open, visitor friendly environment. The 'Rebus 30' temporary exhibition which ran for the majority of the 2017 was very popular. These two factors are considered to be the primary reasons why the Writers' Museum bucked the trend of the other venues.
- 3.5 It should, however, be noted that the Writers' Museum saw a significant change in visitor numbers between 2014/15 and 2015/16, with an increase of 21% from 47,170 in 2014/15 to 57,059 in 2015/16. It is therefore reasonable to assume that the reduced opening hours impacted on the level of increase in visitor numbers that the Writers' Museum could have enjoyed.

3.6 It is also significant to compare this overall decline in visitors across the venues with the Scott and Nelson Monuments, where there has been no change to the opening hours between 2015/16 and 2016/17.

Venue	2015/16	2016/17	Variation	%
Scott Monument	59,061	77,931	+18,870	+24%
Nelson Monument	36,722	41,391	+4,669	+11%

3.7 The Scott and Nelson Monuments enjoyed a significant increase in visitor numbers in 2016/17, unaffected by the reduction in hours introduced at the other venues.

Impact of the Changes to Opening Hours on Income

3.8 The changes to opening hours has had a negative impact on the income taken at each venue. Overall, there has been a 25% decrease in income (retail sales and donations) across the venues.

Income	2015/16	2016/17	Variation	%
Retail sales and donations	£303,732	£227,144	-£76,596	-25%

Income by Venue	2015/16	2016/17	Variation	%
Museum of Childhood	£128,138	£95,830	-£32,308	-25%
Museum of Edinburgh	£31,291	£21,804	-£9,487	-30%
People's Story (donations only)	£1,912	£1,206	-£706	-37%
City Art Centre	£96,972	£63,779	-£33,193	-35%
Writers Museum	£45,257	£44,486	-£770	-1%
Queensferry Museum	£162	£39.00	-£123	-76%
Total	£303,732	£227,144	£76,586	-25%

3.9 The greatest impact has been at our most popular gallery, the City Art Centre, where the loss £33,193 accounts for 43% of the overall decrease in income.

- 3.10 While the service achieved income targets as a whole, the change in opening hours has had a negative impact on the potential to maximise income generated across the venues.

Visitor Experience

- 3.11 The change in opening hours has also impacted on the reputation of the service with our visitors and stakeholders.
- 3.12 Observational evidence has been gathered from the Front of House team and the curatorial staff on both their and the visitor reactions to the change in opening hours.
- 3.13 As each venue can be closed on different days from others, visitors find it difficult to understand which venue is open. This is most keenly felt at the Museum of Edinburgh and the People's Story. These venues are situated directly across the road from each other on the Canongate, and enjoy many of the same visitors. The venues are now closed on different days, with many visitors not getting the chance to experience both venues and they find it frustrating that one is closed.
- 3.14 The Front of House staff reported that many visitors were very unhappy that the venues were closed, particularly during peak periods. They also commented on the number of visitors that attempt to access venues when they are closed (even when the opening hours are clearly stated both on-site and on our marketing material). This is particularly challenging in the summer months, most specifically at the Museum of Childhood where the front doors have been damaged by visitors trying to gain access.
- 3.15 Front of House staff have also stated that the closures have impacted on their morale as they tend to deal directly with visitors who complain about the venues not being open and demand an explanation. Staff feedback has confirmed that the current pattern of service delivery is impacting negatively and welcome this review.
- 3.16 Although the venues are closed to the public, they are still open to staff and the venues such as the Museum of Childhood and the Museum of Edinburgh have office space for the curatorial team.

Competitor Analysis

- 3.17 Research was undertaken to examine opening hours of competitor venues within Edinburgh. Twenty of the City's leading visitor attractions were assessed. Of the twenty none of them closed for two days a week throughout the year, but varied patterns of operation as set out in 3.18 to 3.21.
- 3.18 The closest comparisons are:
- Our Dynamic Earth – October - March, closes Monday and Tuesday. April - September, open seven days per week
 - Craigmillar Castle – October – March, closes Thursday and Friday. April – September, open seven days a week



- 3.19 Of the other 18 attractions, all are open seven days a week throughout the year, with the exception of:
- Gladstone’s Land – closed January and February
 - Newhailes – seven days a week in July and August. Open the rest of the year on a Thursday and Friday.
- 3.20 Five attractions operate without seasonal opening hours, i.e. open seven days a week throughout the year
- National Museum of Scotland – 10am – 5pm
 - Scottish National Gallery – 10am – 5pm, Thursday 10am – 7pm
 - National Portrait Gallery – 10am – 5pm, Thursday 10am – 7pm
 - Surgeons Hall – 10am – 5pm
 - Scottish Story Telling Centre – 10am – 6pm, Sunday 12noon – 6pm
- 3.21 All other attractions operate with varying seasonal opening, all following a similar pattern of shorter hours in the winter and longer in the summer – extended opening April – September /October and reduced opening October/November – March. (see Appendix 2).
- 3.22 When comparing the performance in 2016/17 to 2015/16 a clear pattern emerges. The majority of visitor attractions in Edinburgh have enjoyed greater success in 2016/17 with a significant upturn in visitor numbers, particularly the city centre venues.

Venue	2016	2017	Difference
Edinburgh Castle	1,778,548	1,568,508	+13%
National Galleries of Scotland	1,810,948	1,567,310	+16%
Scottish National Gallery	1,544,069	1,377,710	+12%
Scottish Whisky Experience	326,069	298,014	+9%
The Real Mary King’s Close	227,763	207,461	+10%
St Giles Cathedral	1,171,793	1,108,842	+6%

- 3.23 The average increase of 11% compares favourably with the 21% decrease experienced by the five city centre Museums and Galleries Edinburgh venues, and demonstrates that, as shown by the large increase in visitor numbers at the Scott and Nelson monuments of 24% and 11% respectively, there has been an increase in the number of visitors to attractions in Edinburgh which the Council venues have not benefitted from.

3.24 A visitor figure comparator analysis over the last five years showed that, almost universally, a peak in numbers occurs throughout the summer months – June to August and troughs in the winter months – November to February.

Month	SM	NM	MoE	PS	CAC	MoC	WM
Jan	8000	3000	18000	11000	22000	40000	10000
Feb	16000	4500	24000	15000	22500	68000	13000
Mar	16500	5500	26000	20000	28000	62000	16000
Apr	25000	10000	34000	28000	67000	106000	21000
May	37000	14000	30000	30000	21000	88000	21500
June	40000	17500	31000	29000	26000	83000	22000
July	56000	23000	44000	40000	27000	161000	30000
Aug	67000	27000	51000	45000	65000	173000	37000
Sept	30000	17000	35000	30500	35000	73000	24000
Oct	27000	6000	32000	24000	36000	94000	18000
Nov	13000	5000	21000	16000	28500	58000	13500
Dec	14000	4000	19000	13000	24000	49000	12000

-  Strongest performing months – per visitor numbers
-  Weakest performing months – per visitor numbers

3.25 The City Art Centre was the only venue to show any real variance, due primarily to the attendances at the Science Festival in April each year and the changing programme of exhibitions across the year.

3.26 Moving to a five day a week service saved a total £166,000 in staffing costs over two financial years. However, there was a significant decline in visitor numbers and a reduction in income amounting to £76,598. There were also issues concerning visitor perception and reputational damage. If business as usual were to continue then this may further negatively impact on income, visitor numbers and the service’s reputation.

3.27 It is therefore proposed to convene two review meetings with Culture and Communities elected members, and officers from relevant services, to consider the outcomes of this review and explore detailed options for the future opening hours across the museums and galleries service for implementation from summer 2018.

4. Measures of success

- 4.1 Successful completion of the review of opening hours implemented from 1 October 2016 to ascertain its full impact on visitor numbers

5. Financial impact

- 5.1 There is no financial impact arising from this report.

6. Risk, policy, compliance and governance impact

- 6.1 There is no risk, policy, compliance and governance impact arising from this report.

7. Equalities impact

- 7.1 There is no equalities impact arising from this report.

8. Sustainability impact

- 8.1 There is no sustainability impact arising from this report.

9. Consultation and engagement

- 9.1 Consultation was carried out with stakeholders, competitor attractions and staff.

10. Background reading/external references

- 10.1 N/A

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11. Appendices

Appendix 1 Museums and Galleries Venues

Appendix 2 Comparator Analysis

Appendix 1: Museums Galleries Edinburgh Venues

City Art Centre

Museum of Childhood

Writers Museum

Peoples' Story Museum

Museum of Edinburgh

Trinity Apse

City Observatory

Nelson Monument

Scott Monument

Travelling Gallery

Museum Collection Centre

Lauriston Castle

Queensferry Museum

James Craig House

Appendix 2: Competitor analysis

Investigation into 20 of Edinburgh's leading attractions opening hours, to compare and contrast with Museums and Galleries Edinburgh attractions opening hours patterns.

Attractions analysed:

- Edinburgh Castle
- Craigmillar Castle
- Edinburgh Zoo
- Gladstone's Land
- National Museum of Scotland
- National War Museum
- Newhailes
- Royal Botanic Garden of Edinburgh
- Scottish National Gallery
- National Portrait Gallery
- Gallery of Modern Art
- St Giles Cathedral
- The Real Mary Kings Close
- The Royal Yacht Britannia
- The Scotch Whisky Experience
- Our Dynamic Earth
- Surgeons Hall
- Scottish Storytelling Centre
- Holyrood Palace
- Camera Obscura and World of Illusions

Closest comparable hours:

No attractions, other than Museums and Galleries Edinburgh attractions, operate with closures to attractions two days of the week throughout the year.

The closest comparison to our model comes from:

- Our Dynamic Earth – October to March, closes Mondays and Tuesdays. April – September open seven days
- Craigmillar Castle – October to March, closes Thursday and Friday. April – September open seven days

Attractions that are not open seven days a week:

Of the other attractions analysed, all are open seven days a week throughout the year, with the exception of:

- Gladstone's Land – closed January and February
- Newhailes – seven days a week in July and August. Rest of the year, only open Thursday to Monday

Non Seasonal Attractions:

Five attractions operate without seasonal opening hours (i.e. they are open seven days a year with the same opening hours):

- National Museum of Scotland – 10am-5pm
- Scottish National Gallery – 10am-5pm, Thursday 10am-7pm
- National Portrait Gallery – 10am-5pm, Thursday 10a,-7pm
- Gallery of Modern Art – 10am-5pm
- Surgeons Hall – 10am-5pm
- Scottish Storytelling Centre – 10am-6pm, Sunday 12pm-6pm

Seasonal Attractions:

All other attractions operated with varying seasonal opening, all following a similar pattern of shorter hours in winter and longer in summer

- Edinburgh Castle – April-September 9.30am-6pm, October-March 9.30am-5pm
- Edinburgh Zoo – April-September 9am-6pm, October-March 9am-5pm, November-February 9am-4.30pm
- National War Museum – April-September 9.45am-5.45pm, October-March 9.45am-4.45pm
- Royal Botanic Garden – April-September 10am-6pm, February and October 10am-5pm. November and January 10am-4pm
- St Giles Cathedral – May-September 9am-7pm, October-April 9am-5pm
- Real Mary Kings Close – April-October 10am-9pm, November-March 10am-5pm
- Royal Yacht Britannia – April-September 9.30am-5:30pm, November-March 10am-4.30pm, October 9.30am-4pm
- Scotch Whisky Experience – April-July 10am-6pm, September-March 10am-5pm, August 10am-5pm (5.40pm at weekends)
- Holyrood Palace – April-October 9.30am-6pm, November-March 9.30am-4.30pm
- Camera Obscura – July and August 9am-10pm, September and October 9.30am-7pm, April and June 9.30am-7pm, November-March 10am-6pm

Majority of attractions are operating with seasonal opening hours, with extended opening April - September/October and reduced opening October/November – March.

Monthly Visitor Figures 2016*

Analysis of monthly visitor figures to identify seasonality trends

Edinburgh Castle

Opening Hours:

April to September – 9.30am-6pm

October to March – 9:30am-5pm

Visitor Numbers 2016

Month	Visitor Numbers
January	54,969
February	69,406
March	108,864
April	118,679
May	164,871
June	197,635
July	273,816
August	270,450
September	179,068
October	151,063
November	90,637
December	99,090

Gladstones Land

Opening Hours:

March to December – 10am-5pm

Closed January and February

Visitor Numbers 2016

Month	Visitor Numbers
January	n/a
February	n/a
March	349
April	2,284
May	3,071
June	2,663
July	4,222
August	3,065
September	2,560
October	3,358
November	141
December	94

National Museum of Scotland

Opening Hours:

All year round – 10am-5pm

Visitor Numbers 2016

Month	Visitor Numbers
January	101,690
February	144,208
March	143,657
April	154,053
May	120,500
June	122,934
July	230,711
August	259,501
September	148,407
October	163,948
November	106,249
December	115,440

National Gallery of Scotland

Opening Hours:

All year round – 10am-5pm, Thursdays 10am-7pm

Visitor Numbers 2016

Month	Visitor Numbers
January	88,561
February	77,413
March	88,660
April	95,657
May	108,148
June	118,135
July	186,932
August	253,628
September	156,163
October	163,948
November	106,249
December	115,440

National Portrait Gallery

Opening Hours:

All year round – 10am-5pm, Thursdays 10am-7pm

Visitor Numbers 2016

Month	Visitor Numbers
January	24,882
February	26,845
March	22,538
April	21,564
May	19,872
June	20,731
July	30,101
August	42,577
September	29,026
October	28,141
November	25,585
December	30,891

St Giles Cathedral

Opening Hours:

May to September – 9am-7pm Monday to Friday, Saturdays 9am-5pm, Sundays 1pm-5pm,

October to April – 9am-5pm, Sundays 1pm-3pm

Visitor Numbers 2016

Month	Visitor Numbers
January	42,877
February	49,584
March	78,623
April	83,096
May	113,037
June	123,651
July	160,979
August	163,222
September	114,888
October	100,226
November	65,078
December	76,535

The Real Mary Kings Close

Opening Hours:

April to October – 10am-9pm

November to March – 10am-5pm, Saturdays and Sundays 10am-9pm

Visitor Numbers 2016

Month	Visitor Numbers
January	10,337
February	11,915
March	15,553
April	18,127
May	20,084
June	20,738
July	29,070
August	27,742
September	21,640
October	23,583
November	n/a
December	15,470

The Scotch Whisky Experience

Opening Hours:

April to July – 10am-6pm

August to March – 10am-5pm

Visitor Numbers 2016

Month	Visitor Numbers
January	15,535
February	16,115
March	25,086
April	24,909
May	31,475
June	30,123
July	37,259
August	39,169
September	29,710
October	n/a
November	21,199
December	n/a

Our Dynamic Earth

Opening Hours:

April to October – 10am-5.30pm

July and August – 10am-6pm

November to March – 10am-5.30pm, closed Mondays and Tuesdays

Visitor Numbers 2016

Month	Visitor Numbers
January	15,551
February	21,453
March	21,468
April	35,184
May	25,568
June	33,486
July	39,640
August	27,920
September	18,806
October	39,283
November	16,424
December	11,882

Craigmillar Castle

Opening Hours:

April to September – 9:30am-6pm

October to March – 9:30am-5pm

Visitor Numbers 2016

Month	Visitor Numbers
January	833
February	877
March	1,589
April	2,129
May	2,624
June	2,339
July	4,155
August	3,461
September	1,177
October	1,873
November	1,476
December	688

Camera Obscura and World of Illusions

Opening Hours:

July and August – 9am-10pm

September and October – 9:30am-7pm

November to March – 10am-6pm

April to June – 9:30am-7pm

No visitor numbers available from ASVA website, but conversation with General Manager reported that:

- Opening later than 7pm saw a 20% increase in visitor numbers
- The attraction received two peaks of visitor numbers, one in the afternoon and then another in the evening
- Shop revenues up by over 20% since late opening began, with 67% growth in the last hour of the day

*Figures taken from Association of Scottish Visitor Attractions (ASVA) Visitor Trends Report

2015/2016 Comparison*

Comparison of 2015 and 2016 visitor figures for six of the leading city centre attractions

Attraction	2016 Visitor Numbers	2015 Visitor Numbers	Difference
Edinburgh Castle	1,778,548	1,568,508	+13%
National Museum of Scotland	1,810,948	1,567,310	+16%
Scottish National Gallery	1,544,069	1,377,710	+12%
Scotch Whisky Experience	326,069	298,014	+9%
The Real Mary Kings Close	227,763	207,461	+10%
St Giles Cathedral	1,171,793	1,108,842	+6%

*Figures taken from Association of Scottish Visitor Attractions (ASVA) Visitor Trends Report