

THIS ITEM IS FOR INFORMATION ONLYAgenda item:

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Title of meeting: Culture Leisure and Sport Decision Meeting

Subject: Visitor Numbers for Libraries, Museum and Records and Recreation Services

Date of meeting: 12th October 2012

Report by: Head of City Development and Cultural Services

Wards affected: All

1. Requested by Head of Service

2. Purpose

- 2.1** To update the Cabinet Member on the Museum and Records visitor figures trends for the past 6 years, specifying individual sites and discussing visitor targets for 2012/13.
- 2.2** To update the Cabinet Member on the Library Service visitor trends for the past 6 years along with membership and issues trends and discussing the visitor target for 2012/13.
- 2.3** To update the Cabinet Member on the Recreation visitor trends over a 6 year period.
- 2.4** To continue the strategies adopted to broaden access and increase participation of Cultural Services.

3. Information Requested

3.1 Library Service

3.1.1 National Perspective Visitor numbers

The recent *Taking Part* statistics reveal a 9% decrease over a 7 year period of the number of adults who visit a public library each year, remaining at 39% in March 2012.

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Regionally the South East has seen a more dramatic decline, as the region was above the national average in 2005/6 at 51%, but this has now decreased to just below the national average at 37%.

CASE data, which relies on the Active People data set, is not as recent as the *Taking Part* information but does drill down to local authority level. This shows Portsmouth is close to the national average of adult visits per year.

3.1.2 Portsmouth Perspective

Visitor numbers are a complex picture as the library offer has not remained the same in terms of service delivery and also there are channels shifts developing which impact on participation statistics.

Physical visits tell part of the participation story but there are other statistics to consider to fully understand patterns of usage, such as active borrowers, number of issues, virtual visits and new members.

3.1.3 Physical Visits

The number of physical visits does not indicate the time spent at, or the benefit gained from using the library, but is one of the many indicators of library engagement.

Overall physical visits to Libraries continues to exhibit a downward trend but in the past 3 years the decline has stabilised as physical visits in 2011/12 are almost the same as figures in 2009/10 (Please refer to Appendix A).

This analysis is further complicated by the unprecedented number of temporary building closures in the past two years across many libraries. This was to enable both the introduction of RFID and to complete various building improvements across the service

Southsea Library has enjoyed an increase of over 50 % of visitors in 2011/12 compared to those delivered by Elmgrove library in the previous year. However, it is central library, which is 24% of total physical visits, that has greatest impact on visitor numbers and this library has suffered a 28% decrease in visits in 2011/12.

The central library visits have been impacted by a number of events and service changes. Firstly, the reduced access of 13 hours per week from July 2010 as part of the savings programme, building closures for 5 1/2 months due to flooding and general refurbishment closures, encouraged some users to move to other libraries such as Cosham and North End Libraries, as users adapt to the services offered.

However, the proposed new opening hours planned for the central library in 2012 will play a part in the recovery of visitor numbers along with continuing building refurbishment, ring fencing of the book fund, improving stock availability and provision of new services such as the Portsmouth History Centre and the Macmillan Service.

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3.1.4 Virtual Visitors

The second reason for the decline in physical visits, not just for central library but for all sites, is the ability to access library services virtually as the growth continues in virtual visitors and on line resources. Portsmouth Libraries have adopted new technologies to reach declining audiences as patterns of usage are changing and developing.

Web statistics in libraries are still at an early stage of development and this year public libraries in the South East have agreed standard criteria for counting the use of online reference resources. The number of sessions is the accepted method to count web visits, whereas the previous figures were searches, and this agreed "session" figure is more comparable to a physical visit.

Virtual visits are used for similar purposes as physical visits such as referencing, reserving books, or gaining information about activities and events. However, increasingly virtual visits are likely to be for activities such as downloading audio books, magazines or ebooks which can only be achieved via a personal device.

There were 55,602 on line web transactions in 2011/12 and 22,747 users of online resources such as Ancestry Encyclopaedia Britannica, Find my Past and Oxford Online.

These resources enable users to search the library database both from remote locations and from the library, and provides a further challenge to the statistical analysis of overall visitor numbers.

These virtual visits represent a significant user base and have partially replaced physical visits. The development of the Libraries E-Strategy has wider engagement outcomes to digitise libraries, broaden Library access and adapt to changes in models of use. New developments such as audio downloads and magazines on-line will continue to improve access to services.

3.1.5 New membership

There has been a 28% increase in new membership over a 3 year period to 17,404 new members in 2011/12.

This is in part due to the introduction and high usage of the Peoples Network (PN) since its inception in 2001 as all PN users are required to join the library in order to access the service. The trend also reflects on the success of the outreach team in their recruitment drive and other recruitment mechanisms such as Book start, Book time and the Summer reading challenge (89% increase from 2011/12).

The membership spike is also linked to promotions with our partners such as the 3 month Historic Dockyard promotion and Dickens Birthplace which allowed free entry to library card users.

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The most significant increase is at Southsea Library (Please refer to Appendix B which also shows a stabilisation in the decline in active borrowers) which opened in July 2011. This success significantly altered membership patterns for the Southsea area of the city with a “spike” in library joining, engaging with a new demographic group. Southsea Library did initially draw users from Beddow Library, which saw a short term decline in overall use but this has now reverted to a more positive pattern.

New membership is increasing in a climate where overall physical visits remains a challenge. The reasons for joining a library are more diverse and complex than in the past and do not necessarily equate to library borrowing, or in all cases library visits. Many now join to access information databases and on-line services, others join to access groups and activities, the Portsmouth History Centre, or to use the public access computers.

This is a complex situation not explained by a single factor. It is a combination of members joining for a single or time limited purpose, memberships not forming a long term pattern of use and members choosing to use their card from time to time only to serve a specific requirement.

The Library service will be analysing the new membership success to understand how to translate this increase in new memberships to a further develop an increase in engagement of all Library services . The service will also be developing a more robust method of capturing visitor (RFID statistics) and virtual data in 2012 to enable this data to shape the service and help prioritise the actions in the Library Development Plan.

3.2 Museums and Records Service

3.2.1 National and Regional Perspective

The latest *Taking Part* statistics show a slight increase in visitor numbers from last year of 2.6 % at national level, as 48.9% of adults visited Museums and Galleries on an annual basis.

This increase has been matched at regional level which is currently just above the national average at 49.4%.

3.2.2 Portsmouth Perspective - Successful Upwards Trend

Portsmouth Museums have shown a more significant upward trend than the national figures with a 6% increase from 2010/11. Visitor figures as a total figure have increased steadily over the past 6 years to 273,405 visitors in 2011/12 and all but two sites are now offering free entry. Free admission at Southsea Castle has had a major impact on keeping visitor numbers high.

To understand this picture in greater detail please refer to Appendix C, which details visitor statistics for the six year period for all 6 museums sites. There is a stable or upward trend on most sites with the following exceptions:

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3.2.3 Visitor Figures City Museum

Traditionally, the City Museum has made a significant contribution to the overall visitor figures enjoying approximately 30% of the total Museums visitor numbers in an average year. However, the 2011/12 figure of 55,554 represents a 12% decline compared to an average year.

The main explanations for this decrease are:

- The impact of Museums closures on Mondays from July 2011 (with the exception of D-Day) has had minimal impact on visitor numbers, but statistical analysis informs us it is the searchroom transfer, which facilitates access to city's archives, that has had the most impact on visitor numbers for the City Museum.

This service was moved from the City Museum to the Portsmouth History Centre in the Central Library in July 2011. The visitor numbers for the History Centre for this period were 6,600 visitors which represents approximately 10% of the City Museum's Visitor Figures.

- A secondary impact is the implementation of the savings programme which has limited the staff resource available to run temporary exhibition programmes, along with the reduction in the level of marketing these programmes previously enjoyed. Plans to address this include more involvement of the administration team to play a proactive role to actively market the exhibition programme and also for the Museum Manager to investigate using social media as a tool to promote and raise awareness of future programming.
- The exhibitions in 2011/12 such as *Birds, Beasts and Bugs* have not produced the high visitor numbers such as the "Aliens" exhibition in 2010. The forthcoming exhibition of Victoria & Albert Museum Teddies Collection should encourage more visitors into the City Museum in 2013.

The management team will be looking to develop both events and exhibition programmes which have a wider appeal and simultaneously to continue the targeted audience development work which is a longer term project.

3.2.4 D –Day Museum Investment

Located just behind the seafront, at the junction of Clarence Parade and Avenue de Caen, the D-Day Museum along with Southsea Castle, is a focal point on the seafront and is a key element of the Seafront Strategy and the Seafront Master Plan and provides an income stream for the Museums service.

Every year the D-Day Museum receives on average over fifty thousand visitors and this level of visits for a 27 years old attraction is not unreasonable, but with the exception of anniversary years, visitor numbers have plateaued.

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In 2012 the D-Day Museum will undergo refurbishment to its entrance façade to make it more inviting and welcoming whilst taking the opportunity to rebrand the existing signage to incorporate Portsmouth Visitor Information Service, who moved on site in late summer 2011.

This is the second phase of the capital programme that was agreed in 2011 and is an opportunity to make the best use of our seafront assets and attract people to the area. The D-Day Museum refurbishment is linked to the ideas in the city's regeneration vision of the potential of cultural attractions to deliver the broader regeneration agenda with its emphasis on tourism and the visitor economy.

However, Portsmouth Museum and Records Service are looking to the Museums longer term future and have submitted a bid to HLF in an attempt to secure this inspirational legacy. Today there remains a national and local enthusiasm for D-Day and its 75th anniversary is on the horizon. If successful this project will completely transform the museum and develop the human side of its story, forge new links with museums and community groups across the South of England and contribute to educational and social improvements in the city.

3.2.5 Increase in Visitor Figures – Southsea Castle and Charles Dickens Birthplace

There are two museums which have enjoyed a significant increase in visitor numbers in 2011/12:

- **Southsea Castle:** Free entry to the castle, introduced in 2011 as part of the agreement with our partners Yellow Kite, has been vital to the vibrancy of both the castle and the cafe, and visitor figures to the site have greatly increased – reaching over 90,000 by the end of the 2011/12 season, compared to 26,000 for the same period in 2010/11.
- **Charles Dickens Museum:** visitor numbers have also significantly increased with the refurbishment of the Museum and interest at a national level in the Dickens 200 celebrations, this was reflected in the 96% increase in visitor numbers in 2011/12.

Overall the museum visitor figures should be considered in the environment in which the service operates. There are now more free events offered by other venues with the same level of appeal and the economic environment remains a challenge. Despite this Museum visitor numbers are increasing when many attractions are maintaining visitor numbers.

Therefore, given this environment, the short term prediction to maintain visitor numbers of over 250,000 across all museums is a positive ambition, reflecting the confidence in the potential of cultural attractions to deliver the broader regeneration agenda.

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3.3 Sport & Physical Activity

3.3.1 National and Regional Perspective

There are several national indicators relating to numbers of adults taken part in active sport across the nation but most indicate that adult sports participation has largely remained unchanged, and within confidence intervals, since 2004/5.

The recent data at national level, the *Taking Part* Survey, reveals 54% of the adult population takes part in active sport once a month; this has remained relatively static over a seven year period and is now at 55%. The South East region is slightly above the national average of 58% and this has remained stable over a seven year period.

The former National Indicator (NI8) , which gave detailed data at Local Authority level for sport sessions of 3 x 30 minutes or more per week, also reflect this consistency at local authority level as Portsmouth figures were 23.6% in 20-05/6 and in April 2012 were 23.1%.

3.3.2 Local Perspective – Increase in Physical Visits

The 2011/12 figure for recreation usage was the highest figures in a 6 year period of 1,300,387 visitors to the 6 PCC recreational facilities managed under contract by Parkwood Community Leisure (PCL).

The number of recreational facilities has reduced in 2010-11 as Blue Lagoon was leased to the third sector (Hilsea Lido Pool for the People Trust) and the Pyramids Centre was leased to a private sector operator Southsea Community Leisure Limited. In order to obtain comparable figure, the removal of these facilities from the 10/11 figures, indicate a positive trend, with a 13% increase in usage in 2011/12 (please refer to appendix D).

The sole facility that has experienced a usage decrease in 2011/12 is Charter Community Sports Centre. The two key reasons for this are:

- The integration of new usage and membership tracking software, which now provides more accurate figures than previous years and reflect a realistic picture of usage.
- Funding was withdrawn from early morning swimming from the end of Sept 2010 – which resulted in a loss of approximately 6000 users per annum from this facility.

The facilities which enjoyed the largest percentage user increase is Eastney Swimming pool (increased by 22%) and the Portsmouth Indoor Tennis centre (increase of 17 %).

However, it is the Mountbatten Leisure Centre (MBC) that makes a significant contribution to the increase in the overall utilisation, although the percentage increase is smaller than other facilities at 6%, this increase translates to an extra 57,000 users from 2010/11 figures . MBC is currently 76 % of the overall Leisure facilities usage.

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3.3.3 Mountbatten Centre Utilisation

The redeveloped Mountbatten Leisure Centre was fully operational from July 2009 the facilities include a new 50m swimming pool ,a 150 station fitness gym, new dance studio and refurbished athletics track and cycle track.

The monthly membership campaigns, along with a hugely successful learn to swim programme, continue to improve footfall to the Centre. The past six years have seen a vast increase in the number of gym members, building on the original membership base of approximately 800 people before the centre was redeveloped and is now holding steady at around 2,500 members.

The Centre continues to attract an impressive range of large scale events, having already hosted ASA Swimming Galas, Hampshire Athletics Competitions, British Cycling and Professional Boxing events this year and due to host a televised World Snooker Championships this Autumn.

The utilisation for 2012/13 is already very positive seeing a month on month increase from last year and if the trend continues over the remaining months of this year, it is estimated that the total number of customers coming through the centre in 2012 will be in excess of 1 million.

The redevelopment of the centre has broadened the range of activities on offer and continues to present the city with a fantastic opportunity to continue to attract users and increase participation in sport and physical activity through a wide range of sports development initiatives.

The legacy of the 2012 Olympics and Paralympics will help to challenge people to be more active and campaigns will continue such as *Join in* campaign and *Summer of Sport* to encourage active and healthy lifestyles.

3.4 To summarise

Public libraries are developing their physical presence whilst simultaneously developing a greater digital presence. The Library service will continue to invest in encouraging physical visits to the library, and in particular Central Library, through investing in building refurbishment, improving book stock and layout, adjusting opening hours and introducing new community services, whilst simultaneously encouraging online transactions, developing on line resources and virtual visits.

Portsmouth Museums have shown a more significant upward trend in visitor numbers than the national figures due to the free entry policy to Southsea castle. The service will be sourcing alternative methods of funding to invest in the service and sustain their visitor numbers in a challenging economic environment paying particular attention to the challenges in visitor figures for both City Museum and D-Day Museum.

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The Sports Development Service in Portsmouth has faced challenges in active participation but believes the strategies of long-term facility rationalisation and investment and improvement in quality standards, is slowly beginning to have a positive impact on participation, making sport and physical activity accessible and attractive to more people in the region.

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 Signed by
Stephen Baily
Head of City Development and Cultural Services

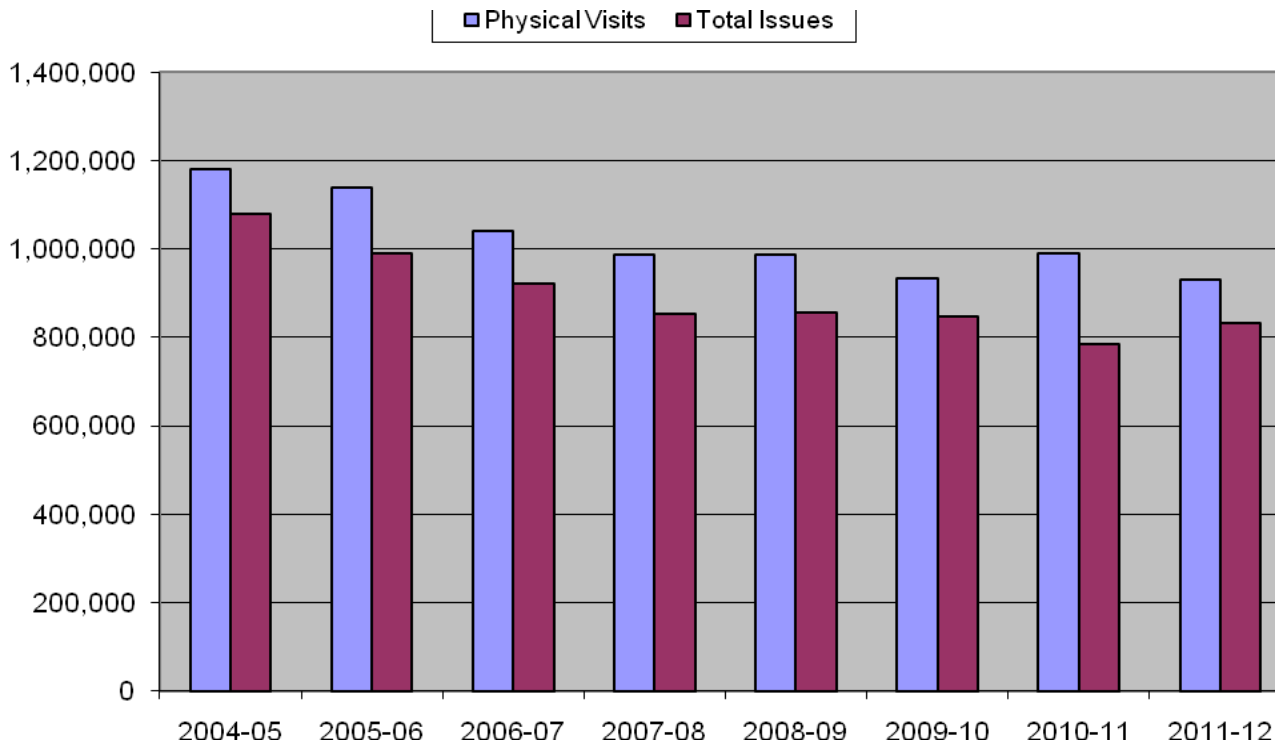
Background list of documents: Section 100D of the Local Government Act 1972

The following documents disclose facts or matters, which have been relied upon to a material extent by the author in preparing this report:

Title of document	Location
1 <i>Central Libraries Changes</i> report Cultural Leisure and Sport 16 September 2010.	PCC website
2 <i>D-Day report</i> for September 2010 to the Culture Leisure and Sport Decision meeting.	PCC website
3 <i>Visitor Figures 16 September 2010</i>	PCC website

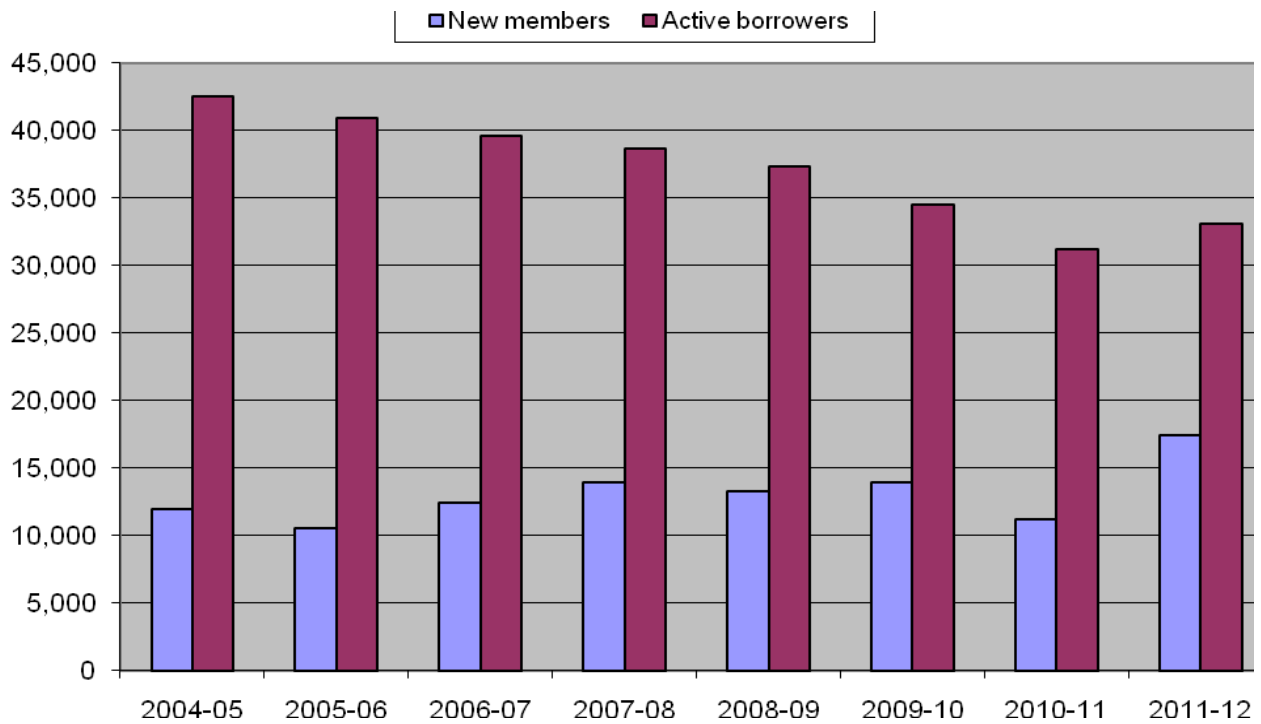
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Appendix A: Library participation-physical visits/total issues 2004-2012



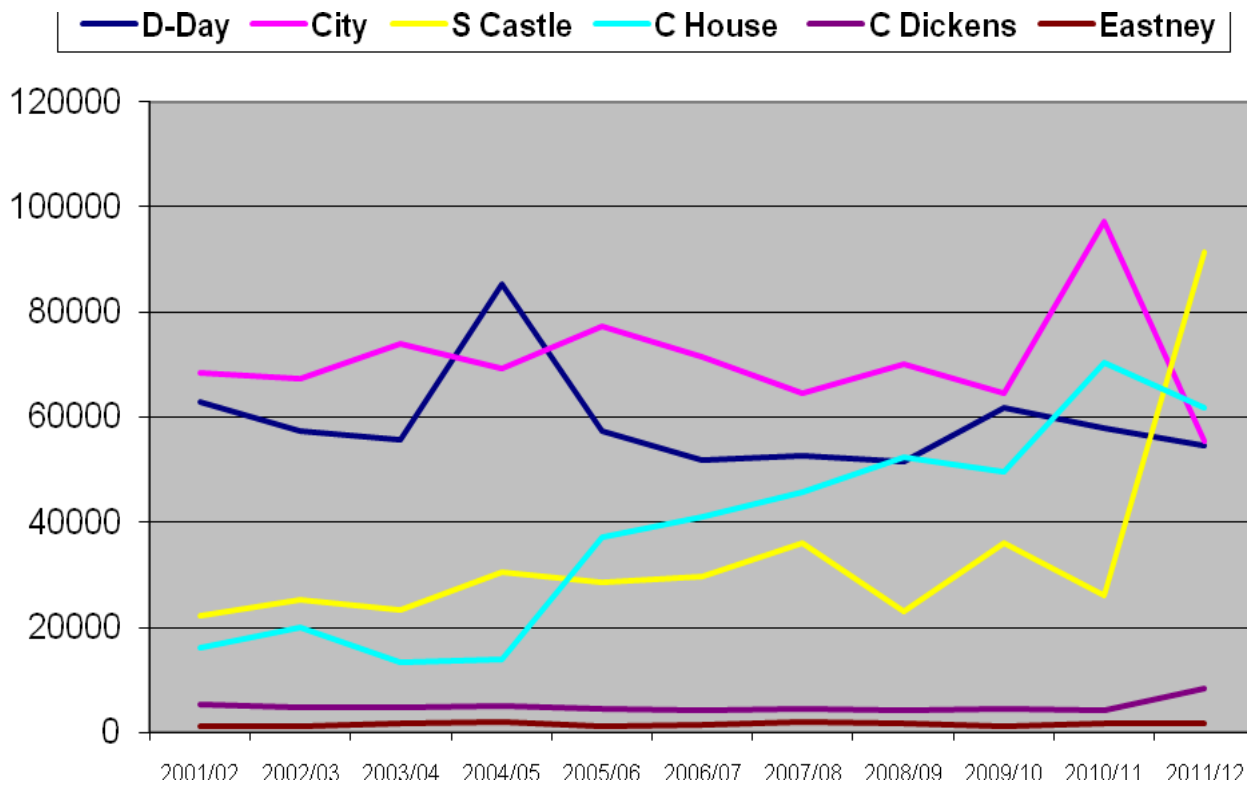
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Appendix B: Library participation- new members/active borrowers 2004-2012



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Appendix C: Museum and Records Visitor figures 2001-2012



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Appendix D: Recreation Visitor figures 2006-2012

