

## **Briefing for Culture, Communications, Welsh Language, Sport, and**

### **International Relations Committee: Charging for Exhibitions**

**15/04/2025**

The Culture, Communications, Welsh Language, Sport, and International Relations Committee is undertaking an inquiry into charging for access to exhibitions. As part of its inquiry, the Committee visited Big Pit on 13<sup>th</sup> March 2025. This paper outlines more details about Big Pit and the charging trials for the Committee.

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#### **Introduction**

Big Pit National Coal Museum is a living, breathing reminder of the coal industry in Wales and the people and society it created. Set in the unique Blaenavon Industrial Landscape and designated UNESCO World Heritage Site, Big Pit stands as a globally recognised symbol of Wales' rich industrial heritage, drawing visitors from around the world to experience its history firsthand. Big Pit is a source of great pride for the local community and across the south Wales valleys. At the international level, in addition to being in a UNESCO site, Big Pit is also an anchor point on the European Route of Industrial Heritage, which bridges 850 sites across 32 countries.

Big Pit is a leading industrial heritage destination deserving of a world-class visitor experience. In 2005, Big Pit won the prestigious Museum of the Year Award, formerly known as the Gulbenkian Prize for Museum of the Year. Big Pit's success has continued into 2025, once more earning recognition as one of the best free attractions in Wales and the second-best in the UK. This ranking was based on a study which analysed TripAdvisor reviews and ratings with an impressive 89.9% of visitors awarding Big Pit five stars and an average rating of 4.86 out of 5 at a time when charging trials at the museum were underway.

Visitor numbers at Big Pit in 2023/24 reached 118,368, reflecting a rise from the post-COVID total of 100,821 in 2022/23. While still progressing towards the pre-pandemic level of 149,670 in 2018/19, the upward trend highlights ongoing recovery and growing visitor interest. We saw an increase in the number of visitors choosing to do the underground during the charging trial period in summer 2024.

#### **Visitor Experience Offer**

Big Pit is one of the last remaining coal mines in the UK open to the public and offers visitors an enhanced experience of life both above, and below, the coal face. While the underground tour at Big Pit is a major attraction, it is just one part of a much broader experience that showcases the culture and history of mining which includes:

- **Underground Tour:** Visitors are equipped like real miners, donning a helmet, cap lamp, belt, battery, and being shown a 'self-rescuer', before descending 300 feet down the Big Pit mineshaft for a guided tour around a section of original mine workings.
- **Mining Galleries:** The surface-level displays, exhibitions and interpretation features were instrumental in Big Pit receiving the Gulbenkian Prize. These exhibits explore into the geology and uses of coal, as well as the cultural, political, and social impact of mining on Welsh communities. Themes include strikes, nationalisation, mining disasters and rescues, health issues, daily life, and a collection of mining memorabilia.
- **Pithead Baths:** The restored Pithead Baths showcase how miners worked, washed, and adapted to changing conditions. Before these facilities, they relied on tin tubs in their homes laboriously and dangerously prepared by female relatives or communal washhouses. Interactive exhibits highlight their daily lives, working conditions, and the strong bonds of mining communities.

- **King Coal – The Mining Experience:** This immersive audio-visual experience provides a simulation of working underground and tells the story of the evolution and technical advancement in the mining industry from the use of explosives to coal cutting machinery.
- **Winding Engine House:** This houses the original machinery used to transport miners and coal between the surface and underground. This historic site offers a great photo opportunity, showcasing the powerful steam-driven engine that was vital to the mine's operations.
- **Locomotive and Coal Dram Collection:** Historic locomotives, coal drams and large mining equipment are available to see at surface-level at Big Pit. These exhibits highlight the crucial role of transport in underground mining operations.
- **Blacksmith:** At Big Pit, the Blacksmith workshop offers a hands-on experience, showcasing traditional metalworking techniques used to maintain mining equipment. Visitors can watch skilled blacksmiths craft and repair tools, gaining insight into the essential role of metalworking in keeping the mining operations running smoothly.

Focusing solely on the underground tour as the main reason to visit Big Pit may not fully capture the rich and diverse stories it has to offer. Each of the surface-level attractions helps to explore the daily lives of the miners, the collective efforts of the community to sustain the industry, the contributions of women and children, the social reforms that emerged, the evolution of the industry, and Big Pit's far-reaching global impact. Each of these narratives contributes to a deeper understanding of the coal mining legacy and its lasting significance. Ultimately, Big Pit tells the story of how coal mining has shaped modern Wales.

Unlike other museums, Big Pit's miner-guided tours are highly labour-intensive. To stay open to the public, the site must meet stringent safety regulations, including mine safety, visitor safety, fire safety, public liability, and machinery safety. Each underground tour requires six staff members—winder, fitter, banksman, electrician, deputy, and pitman—and it takes six months to train a mine guide. Whether they are a former miner or newly qualified, each guide offers a personalised tour, sharing histories, answering questions and providing a bespoke experience not found at other museums. All of this comes at a cost.

### **Broader Community Offer**

Big Pit is not only a significant tourist destination but also a vital community hub. The Museum provides a wider learning, health and well-being, and career development offering, enriching visitors' understanding and engagement.

#### **Learning**

Amgueddfa Cymru's mission is to inspire learning and enjoyment for the people of Wales through the national collection. Big Pit welcomes approximately 28,000 formal learning visitors each year, with 3,800 of these participating in facilitated workshops. The biggest proportion of school visitors are from south Wales, but we have partnered with Yr Urdd and their residential camp in Cardiff Bay to host school visitors from north Wales. Through workshops, such as 'Servants of the Empire': Victorian Children at Work, Big Pit engages with schools across the border in Bristol and Gloucestershire to discuss migration into the coalfields by people from these areas. The workshops explore what life was like for the thousands of children in Victorian Britain who went out to work, while drawing on objects from our collections.

The investment in staff in the digital learning team has put Amgueddfa Cymru at the forefront of virtual and digital engagement. Our digital learning offer allows us to go much further than engagement with industrial communities with virtual sessions being held with schools in Powys, the Vale of Glamorgan and several other areas of Wales. The Welsh curriculum's concept of Cynefin underpins school workshops at Big Pit, making them relatable for schools across Wales and further afield. The provision of virtual sessions has increased our

international reach. The numbers of French schools making bookings are increasing in 2025, returning to levels previously seen pre-Covid. Smaller numbers of schools from other countries overseas such as Germany & Italy also visit regularly.

## Health & Well-being

This is reinforced by the fact that Amgueddfa Cymru's Health and Well-being Lead is primarily based at Big Pit. Some of these require additional funding to Grant-in-Aid, so the ability to self-generate additional income is valuable and needs to be decided on a case-by-case basis by AC, based on data and the circumstances. The Museum plays a key role in promoting community well-being by hosting a range of programmes, including:

- **Grŵp Glo:** This is an intergenerational group, which has been running since 2018. It brings together pupils from Ysgol Bryn Onnen & Blaenavon Heritage Schools with residents from the local community and the local Arthur Jenkins care home. The group have worked on a project for Blaenavon World Heritage Day centred around the theme of 'belonging' and its role in connecting people across generations. The group has created a book and a film, which will be launched at Blaenavon Workmen's Hall on World Heritage Day in June 2025. The group has inspired the development of other projects at some the other museums in the Amgueddfa Cymru family. We have designed and started testing staff training packages, successfully conducting three pilot sessions with small staff groups across three of our museums.
- **Museums Inspiring Memories:** A a three-year project led by Amgueddfa Cymru in partnership with Alzheimer's Society Cymru, funded by the National Lottery Community Fund. The project is designed to improve the lives of people affected by dementia by increasing access to museums and heritage sites. This program will conclude later this year as its three-year funding period comes to an end, but we hope to embed it into our core work at Amgueddfa Cymru. The project aims to enhance the quality of life and well-being of 3,000 individuals while also training 100 carers and care home staff in interactive activities to better support those in their care. Additionally, it will develop and deliver bespoke dementia awareness training to 600 individuals across the heritage sector.
- **Caffi MINE:** A dementia-supportive group open to all, designed around dementia-friendly principles to specifically support carers and those they care for. Its purpose is to offer a welcome respite while visiting the museum. Sessions include visits to heritage sites, reminiscence activities inspired by museum collections, and hands-on experiences such as creating a sensory garden and engaging in photography projects. The group also organises classic film screenings in the wider community at Blaenavon Workmen's Hall. It is free to attend thanks to funding from National Grid.

## Career Development

Following Big Pit's closure as an active mine in 1980, it reopened as a museum in 1983, and Blaenavon's industrial landscape was designated a UNESCO World Heritage Site in 2000. Many former miners and technicians took on key roles, including leading underground tours, to keep the site operational. However, as the workforce aged, succession planning became essential to preserve both the site and the specialised skills of its heritage, curation, conservation, and technical staff. In response, the first Big Pit Staffing Succession Plan was approved in 2016, leading to the appointment of six Mining Craft Apprentices between 2017 and 2018. Supported by the Brecon Beacons National Park Authority's Sustainable Development Fund, this scheme ensures new generations gain the expertise needed to maintain Big Pit.

Apprentices at Big Pit complete various qualifications, with Mining Craft Apprentices earning an NPQC Level 2 in Escorting Mine Visitors, while Electrical Apprentices undertake a four-year vocational course at Gower College, Swansea. Their training spans both engineering and visitor operations, with later stages including mine

rescue training. Funding from Blaenavon Town Council, Business Wales Skills Gateway, and the Welsh Government supports these programmes. The 2012–2023 Succession Plan continued, with the first female Mining Craft Apprentice hired in 2017, followed by two more in 2023. The scheme has produced nearly 20 new apprentices across Mining Craft, Mechanical, and Electrical fields, with many achieving notable successes, such as Aled Winter, who won Engineer Apprentice of the Year at Gower College in 2023. Despite challenges, such as staff leaving for higher-paid roles, the succession plan remains crucial in securing Big Pit's future.

### **Rationale for Charging Trials**

In the autumn of 2023, the Welsh Government encouraged Amgueddfa Cymru to explore different charging models across Amgueddfa Cymru museums for discrete and distinct activities during the Senedd Culture, Communications, Welsh Language, Sport, and International Relations Committee session on the 2024–2025 Welsh Government budget. This built on a long-established practice at the museum to charge for entry to special events and exhibitions, set against the background of Welsh Government policy of free access at entry to Amgueddfa Cymru museums.

As a result, Amgueddfa Cymru began to research and implement a variety of charging trials and pilots with the aim of gathering better quality data and information to inform our understanding. Amgueddfa Cymru is one of the few cultural institutions in Wales with a dedicated Data and CRM team, ensuring a focused approach to managing and leveraging data for enhanced visitor engagement and institutional growth. The data gathered by the team will help us to explore ways of providing access to all and guide future decisions, helping to support our financial sustainability while aligning with our strategic goals and values.

Throughout 2024, two charging trials took place at Big Pit, one during the school summer holiday (20 July – 1 August 2024) and a second across term time and half term (1 October 2024 and 3 November 2024) under the core principle that Amgueddfa Cymru is for everyone, and we do not wish to create barriers to access.

It should be emphasised that drastic budget cuts of late 2023 resulted in Amgueddfa Cymru losing one in six staff members - 144 - within a six-week period between mid-February and early April 2024 through a voluntary redundancy programme. Amgueddfa Cymru had to complete a full organisational reshaping by 1 April 2024 to prevent even deeper cuts. Charging trials offer the opportunity to explore the possibility of raising self-generated income towards our remit to strengthen our financial resilience, without compromising our commitment to access. This is especially crucial given the financial uncertainty facing the cultural sector.

### **Data for the Previous Charging Trial**

Prior to the charging trials we were already aware that from our audience insight data and CRM system that:

- **25%** of visitors to Big Pit opted to pay for a 'Jobaknock', whereby visitors could secure a specific time slot for an underground tour. This model was adopted pre-Covid.
- **Most visitors** are first-time, one-off or occasional visitors.
- Traditionally, the **donation box** at the top of the mine shaft is the most successful at Big Pit suggesting visitors see the experience as valuable. This is supported by the visitor feedback pre trials and during the trials whereby visitors are more than happy to pay, if not surprised not to be paying more.

Since implementing the charging trials, we have discovered that:

- **98%** of visitors at Big Pit were happy with the amount they paid.
- **40%** noted they would have been willing to pay more.
- **94/100** achieved this outstanding Net Promoter Score from a survey of 575 visitors.

- 86% of site visitors participated in underground tours, consistent with 84% during the same period in 2023.
- As before, most tickets for the 'Jobaknock' specific time slot underground tours were **bought by new visitors** to the site, rather than return visitors.

Satisfaction levels, visitor numbers and conversion levels therefore all remain high and on par with expectation. This suggests that the charges have not been a barrier. We also believe that charging for these experiences creates a sense of value for visitors. [REDACTED]

[REDACTED] With this in mind, Amgueddfa Cymru is eager to evaluate whether the collected data and evidence would remain consistent and dependable over an extended period.

### Data for the Upcoming Charging Trial

It was decided that Amgueddfa Cymru would develop a set of principles, against which future charging models for discrete and distinct activity would be considered. These principles would act as a set of guardrails while making decisions about charging models. These principles highlighted that any approach taken would uphold Amgueddfa Cymru's commitment to free entry, protect its reputation, and align with its values and strategic aims. Charging models will focus on distinct activities that justify additional investment of time, resources, and expertise while ensuring financial sustainability through net additional income. Decisions will be data-informed, reflect confidence in the value of the experience, and consider under-represented communities. Our trustees will be kept informed, and regular impact reviews will be conducted to ensure ongoing effectiveness.

Following the two limited trials in 2024, we wanted to assess whether the data and evidence gathered would be reliable over the course of a full year or longer, including any fluctuations or variations throughout that period. With the support of the Data and CRM team, Big Pit, will now conduct an extended trial from April 2025 to July 2026. As part of the extended trial we will continue to monitor visitor numbers to the museum; conversion of site visitors to the tour; satisfaction levels through the net promoter scores; qualitative data and feedback; net income across site; open Concession and Free Days uptake levels; and postcode data acquired through bookings – both charged for and free.

To obtain comparative data, we will maintain these elements of the charging model:

- **JobaKnock:** Pre-booked and dedicated time slot tickets will be available online at £8 per person with on the day tours charged at £5 per person. The competitive cost has been bench-marked against Rhondda Heritage Park; National Coal Mining Museum of England and the National Mining Museum of Scotland.
- **Complimentary tickets:** Free tickets will still be available for Hynt members, Amgueddfa Cymru Members and school groups.

To explore new elements of the charging model we will also adopt the following concessions:

- **Open concessions:** These concessions will allow individuals and families to self-select the lower charge of £3 by simply stating their preference, with no requirement for evidence and no questions asked.
- **Free For All Days:** Community days are currently being developed in collaboration with our Engagement team and site staff. While the highlight will be the 'Big Pit Big Bash Day', the team is planning additional events, which will be widely publicised.

When deciding on the concessions for the trials, we benchmarked with other organisations in Wales and beyond, including Cadw, We the Curious, Coal mining museums, and Blaenavon. These organisations offer a

range of concession price day tickets and reduced rate membership options. We the Curious in Bristol offer open concessions - a concession price to anyone who self-determines that their circumstances make them eligible, without asking for proof of eligibility. This is a model that is more commonly used by performing arts organisations. Anecdotally, organisations who offer the open concession model report visitors opting for it for reasons are blue light discount holders; senior citizen; student; and those receiving benefits.

In terms of datasets, throughout the trial we will be looking at:

- The visitor numbers, in comparison to targets, forecasting and previous years;
- The income generated, in comparison to forecasting and previous years as well as any impact on secondary spend;
- The take-up of Open Concession tickets against Standard tickets;
- The conversion of visitors to the site vs those who go underground (either with Jobaknock tickets or on the door tickets);
- Survey responses from those visiting the Site, net promoter scores and the demographics of those completing the surveys;
- The postcodes of ticket bookers and survey respondents, highlighting any areas with low attendance; and
- The take up of the community free entry days, and the demographics of those people attending.

#### **Impact Assessment on Accessibility**

Based on data from the charging trials, satisfaction levels, visitor numbers, and conversion rates have all remained consistent. This suggests that the introduction of charging has not significantly affected audience diversity. This is especially relevant for local communities, as most of our visitors on the underground tours are first-time or one-off visitors.

In order to assess how the charging model might impact accessibility for various visitor groups we will be looking at:

- The take up of the open concession tickets as well as the Community open days;
- Feedback from those attending around the 'Value for money' question in the survey as well as verbal and written feedback;
- Audience segmentation by integrating our CRM data with Audience Spectrum (used Nationally across the Arts and Culture sector, which uses postcode data to analyse audience demographics to identify those who are booking in advance; and
- Our CRM & Data Team are also working with Welsh Government on overlaying our data sets with larger data sets such as census data and levels of deprivation to identify gaps in our reach and audiences.

Amgueddfa Cymru is unable to monitor data for visitors who do not engage with Big Pit. We acknowledge that certain demographics may have historically been less engaged with Big Pit due to factors such as socio-economic barriers, transportation issues, access to information, lack of awareness about the Museum, physical accessibility challenges, and cultural or generational factors that influence interest in industrial heritage. This issue is not unique to Amgueddfa Cymru; to our knowledge, no museums across the UK or cultural organisations in Wales are currently conducting research to fully understand these gaps. Addressing this would require significant resources, ideally led by national government initiatives, to identify and mitigate these barriers effectively.

Our CRM & Data team are in discussion with the Welsh Government Data Team to explore how anonymised data we have could be overlaid with Welsh Government data to help us understand elements of this issue. A working group has been formed to take forward the recommendations from Trust Impact to look into free ticketing options across three pilot Museums. Data collection via free ticketing methods may allow us to understand who is and isn't attending, as well as being able to follow up with visitor feedback surveys. Revised visitor surveys aimed at gathering data from across our visitors in one centralised survey, which can then be analysed in Power BI alongside our other data points.

The charging options under consideration will not diminish Amgueddfa Cymru's status of free access at entry to its sites. Enabling the museum to continue to charge for discrete and distinct activities on a case-by-case basis, gives an additional stream of income generation that supports the museum's wider work and purpose in addition to the Grant in Aid the museum receives.

#### **Projected Income from Charging at Big Pit**



#### **Balancing the Cost of Free Entry: If Amgueddfa Cymru were not to receive the income generated from charging for underground tours, what mitigation would need to be considered for operations to continue on current income levels?**

Amgueddfa Cymru is already optimising existing revenue streams such as retail, catering, car parking, corporate hire and filming rights, in addition to funding streams such as donations and grants. There are very few other readily available revenue streams which would allow operations to continue at current income levels.

#### **Climate Change Risks to Big Pit**

Historically, in deep coal mines, when there is a sharp and sudden fall in the barometer gases are released in the mine workings. The main gasses released are Methane Gas (from the coal and voids in the strata) and Blackdamp (a mixture of Nitrogen and Carbon Dioxide). Both gases pose serious dangers. Methane as it is explosive in certain quantities and Blackdamp as it is an asphyxiant.

There have been no recorded levels of Methane Gas since the mine stopped production in 1980. Blackdamp however has been recorded on numerous occasions particularly in the winter months when sharp and sudden falls in the barometer take place.

In the past when Blackdamp has been found, its effect being to reduce the amount of oxygen in the general body of air underground, Big Pit has suspended all underground tours until oxygen levels recover with the barometer rising. What we have done to combat this is to construct new air doors around the pit bottom area which gives us more control on the flow of mine air and installed Oxygen and Carbon Dioxide detection heads (which are continually monitored to the surface) at strategic points underground giving us early warning indication.

To compliment these measures and to future proof the mine we are in the process of constructing a new surface fan house (in place of the existing) to accommodate two new modern fans which will ventilate our underground passageways with the ability to increase or decrease the airflow to combat inclement weather issues.

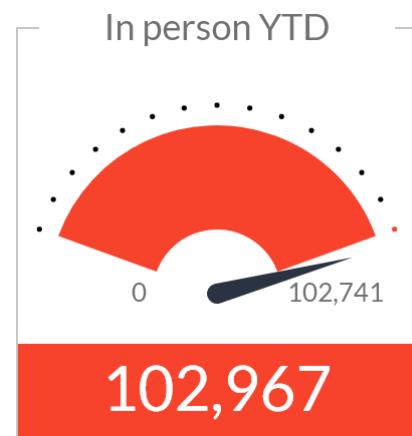
These challenges have always been associated with deep coal mining and do not appear to be affected by climate change.



# AMGUEDDFA CYMRU

## Visitor Figures | Big Pit

In Person Visitors (to target) THIS YEAR



In Person Visitors: Last year

Last year  
**102,967**

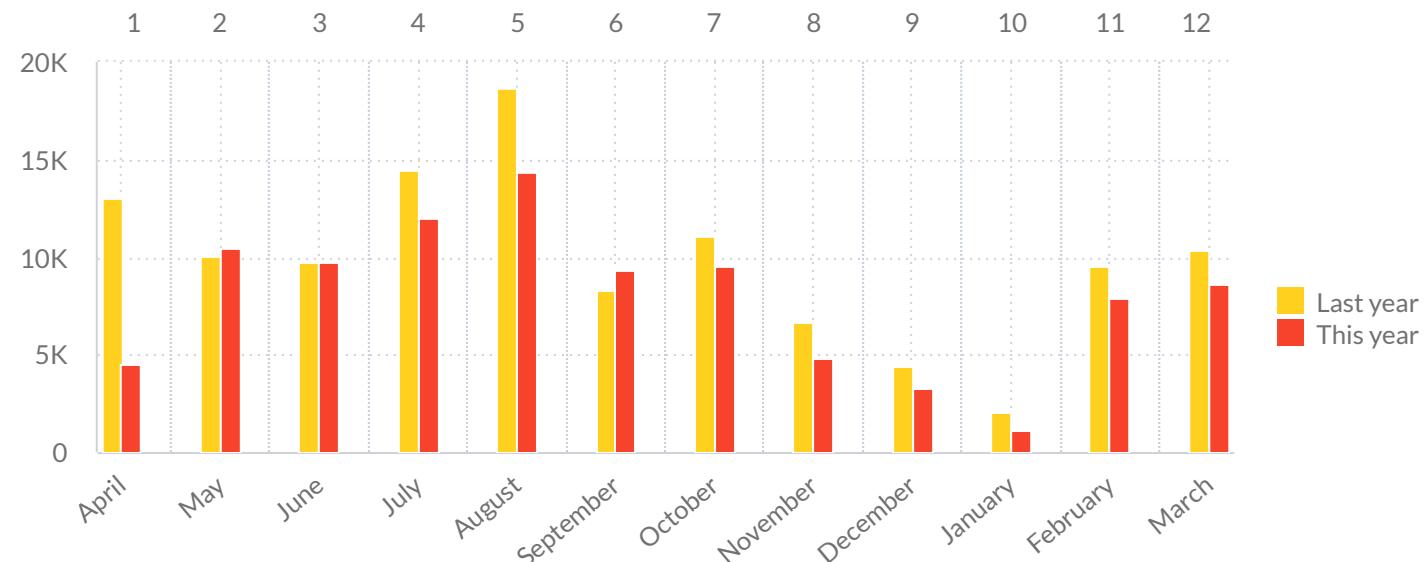
Visitors to Target YTD

FY	Calendar Month	Big Pit National Coal Museum	
		Monthly Target	Actual Visitors
1	April	13,340	11,658
2	May	11,000	10,494
3	June	12,100	9,737
4	July	9,300	12,044
5	August	11,400	14,355
6	September	8,860	9,296
7	October	9,500	9,580
8	November	5,733	4,871
9	December	3,098	3,267
10	January	1,282	1,118
11	February	8,528	7,917
12	March	8,600	8,630
Grand Total		102,741	102,967

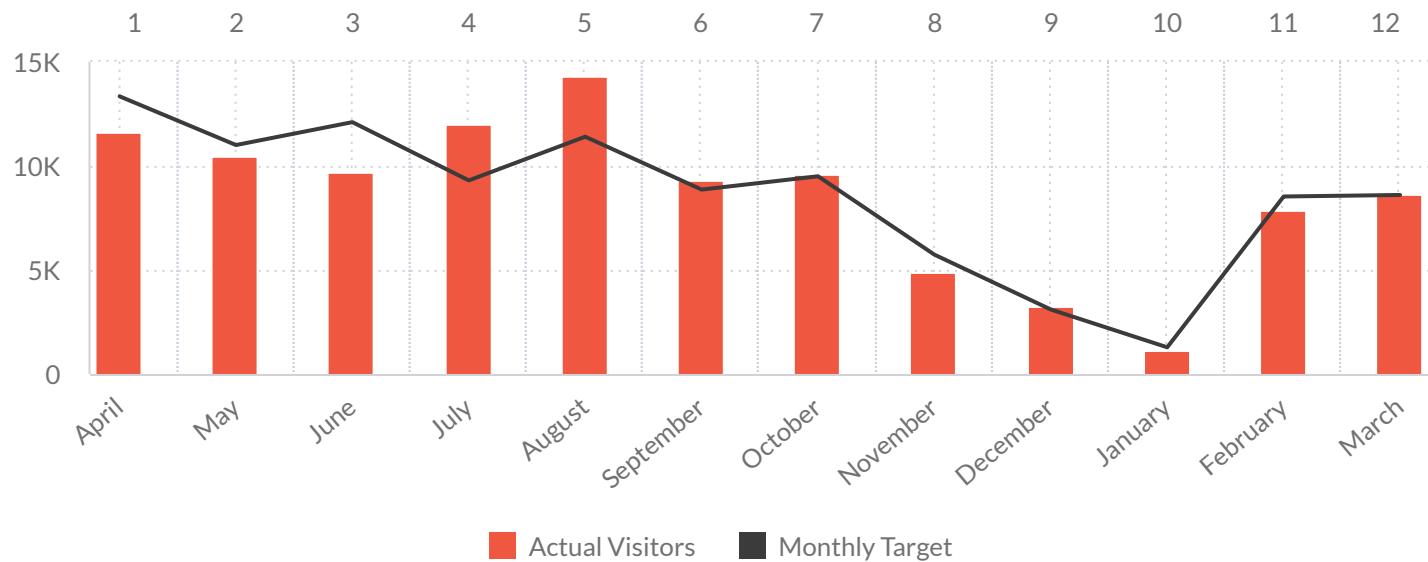
Visitor split (per site per month)

FY	Month	Total Ticket Count		
		*Formal Learning	*General Day	*Pre Booked
1	April	4,180	7,407	71
2	May	2,881	7,340	273
3	June	4,295	5,207	235
4	July	2,847	8,189	1,008
5	August	95	13,421	839
6	September	2,706	6,267	323
7	October	3,935	5,333	312
8	November	2,134	2,680	57
9	December	901	2,312	54
10	January	68	1,050	
11	February	3,510	4,353	54
12	March	4,622	3,810	198
Grand Total		32,174	67,369	3,424

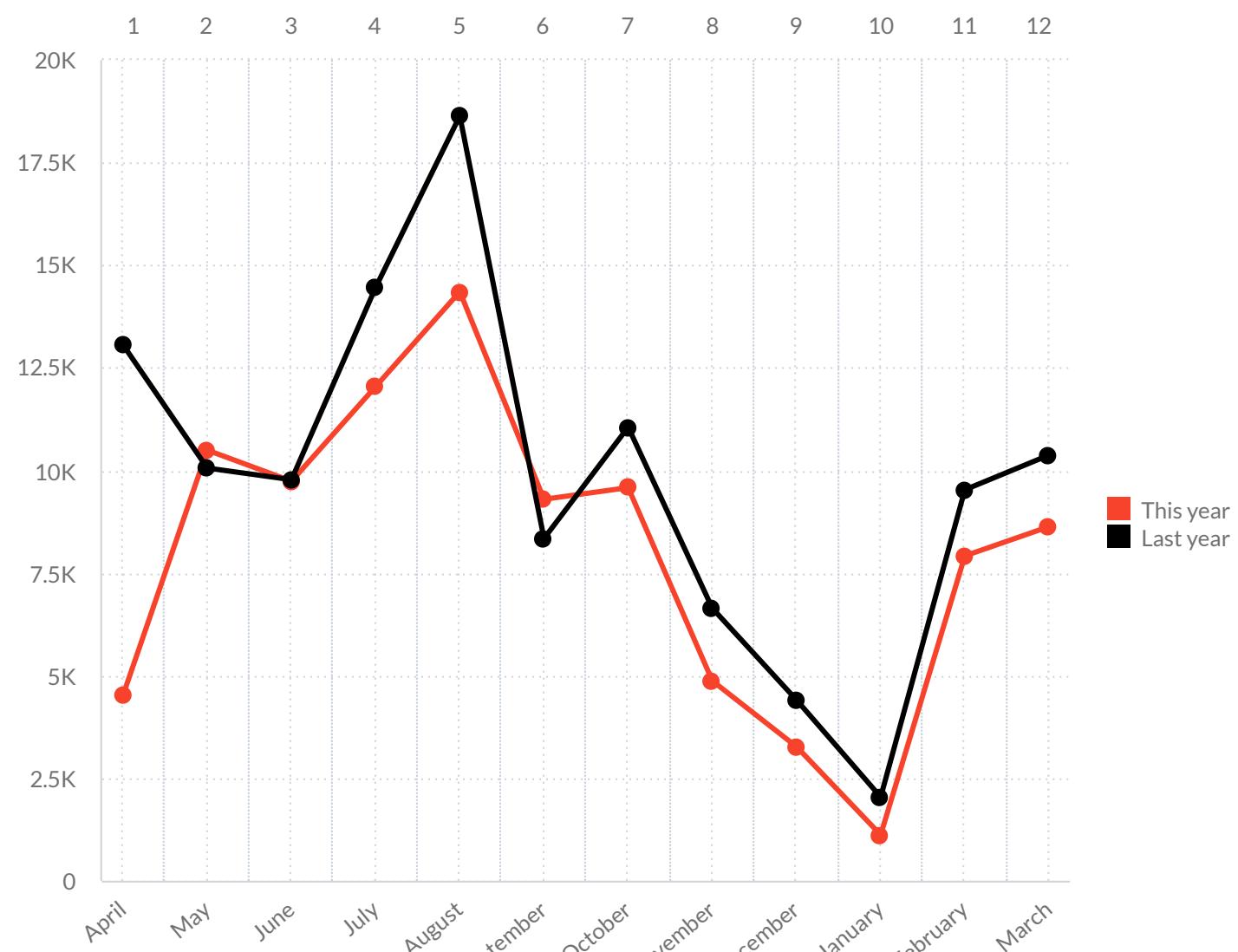
### Month on Month comparison



### YTD Visitors to Target 2023/24



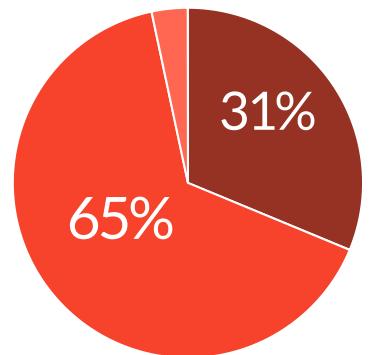
### Year on Year comparison



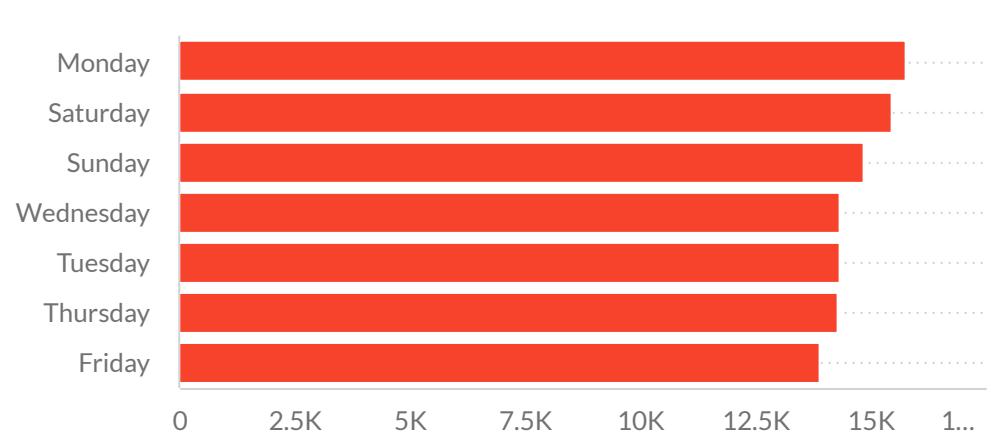
### Growth by year

Years in Date	Calendar Month Sort	Total Ticket Count	Growth
2023	04 April	13,057	
	05 May	10,057	4.35%
	06 June	9,773	-0.37%
	07 July	14,460	-16.71%
	08 August	18,637	-22.98%
	09 September	8,341	11.45%
	10 October	11,055	-13.34%
	11 November	6,640	-26.64%
	12 December	4,406	-25.85%
	01 January	2,041	-45.22%
	02 February	9,528	-16.91%
	03 March	10,373	-16.80%
2024	04 April	11,658	-85.01%
	05 May	10,494	-100.00%
	06 June	9,737	-100.00%
	07 July	12,044	-100.00%
	08 August	14,355	-100.00%
	09 September	9,296	-100.00%
	10 October	9,580	-100.00%
	11 November	4,871	-100.00%
	12 December	3,267	-100.00%
	01 January	1,118	-100.00%
	02 February	7,917	-100.00%
	03 March	8,630	-100.00%
2025	04 April	1,747	-100.00%
	05 May	1,747	-100.00%
	06 June	1,747	-100.00%
	07 July	1,747	-100.00%
	08 August	1,747	-100.00%
	09 September	1,747	-100.00%
	10 October	1,747	-100.00%
	11 November	1,747	-100.00%
	12 December	1,747	-100.00%
	01 January	1,747	-100.00%

### Split by Visitor Type YTD



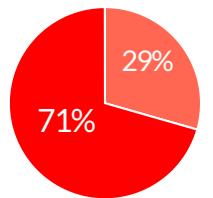
### Visitors by Day YTD



### Busiest Day to date YTD

Date	Total Visitors
01/09/2024	1,179

### Weekday/Weekend Split YTD



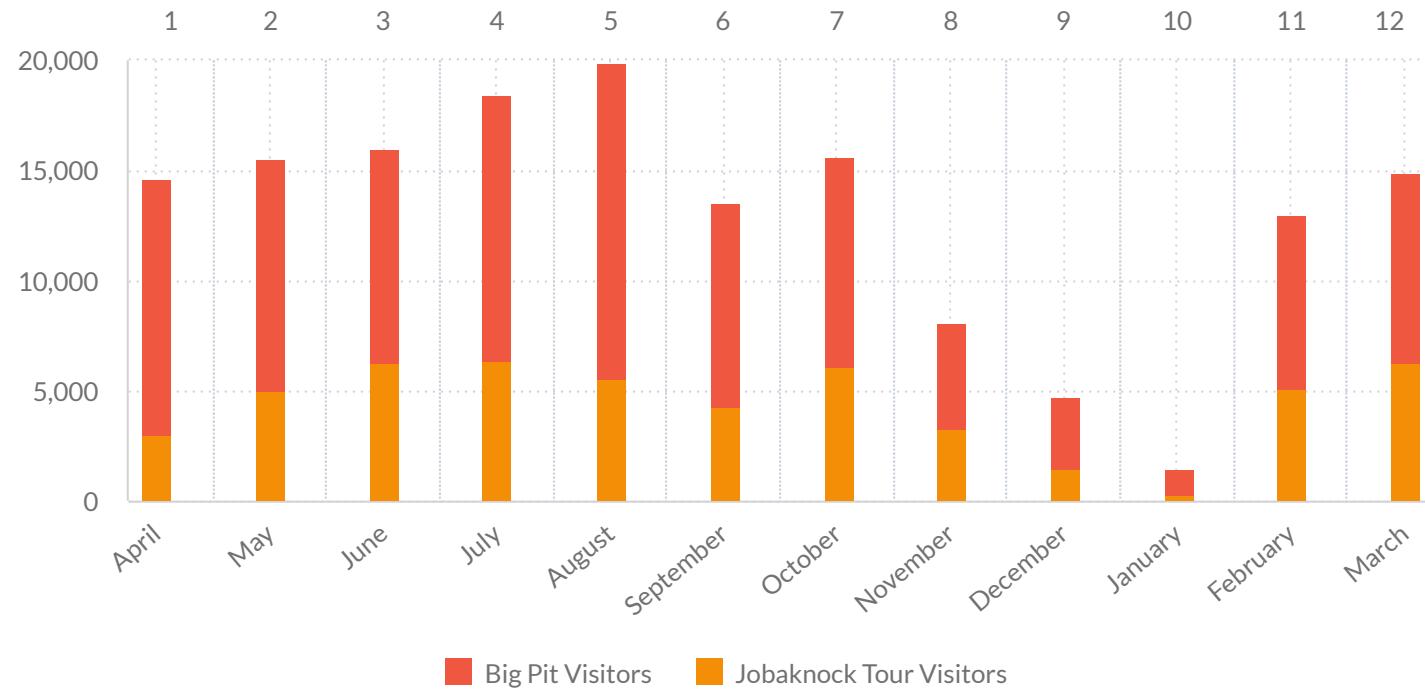
### Average Weekday YTD

Average/Weekday  
**287**

### Average Weekend YTD

Average/Weekend  
**292**

### Big Pit / Jobaknock YTD



### Big Pit | Tap to Donate income by Month YTD

