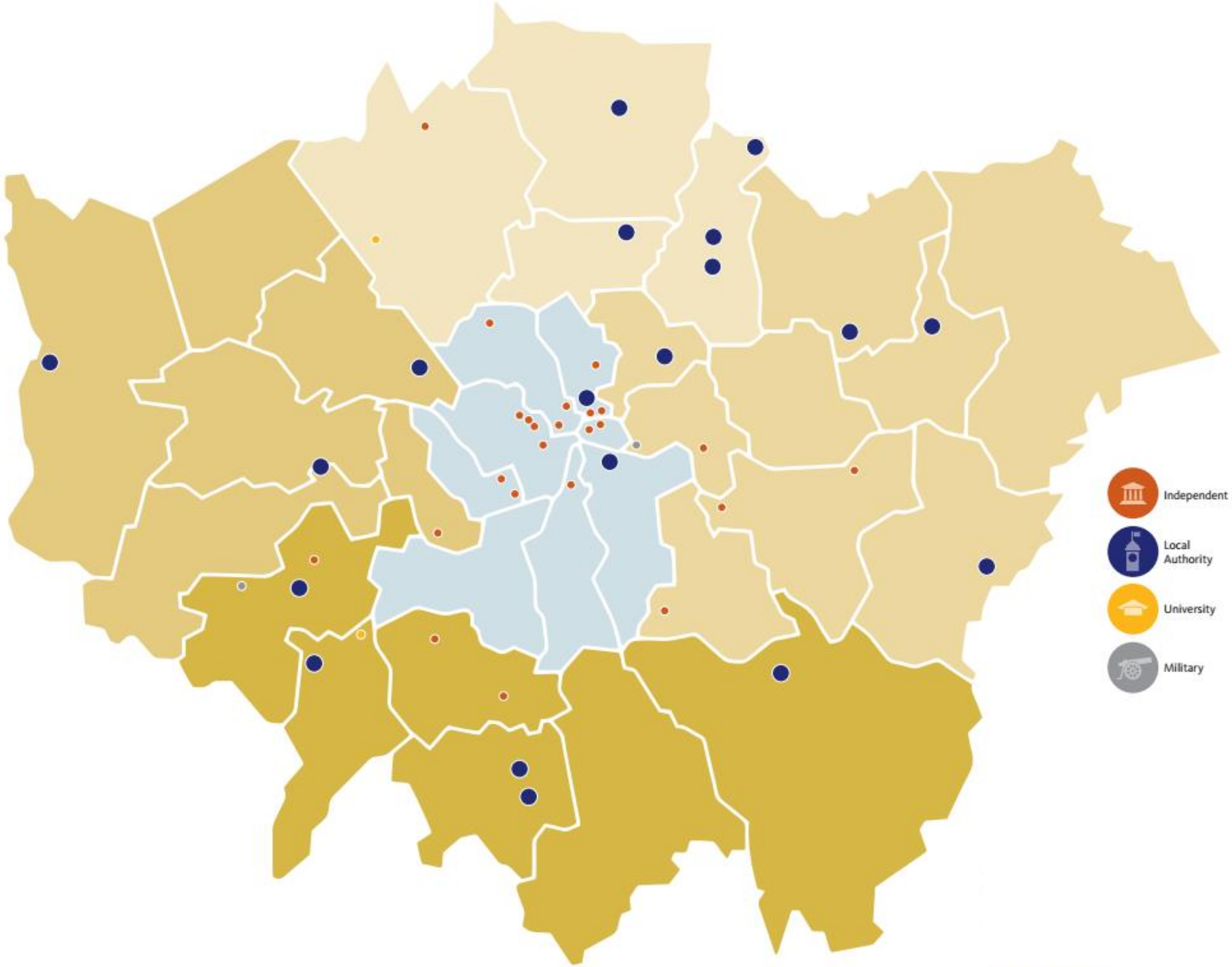
Museums survey 2018



DETAILED REPORT

Supported by ARTS COUNCIL ENGLAND

LONDON MUSEUM DEVELOPMENT

Summary of findings

This is the first survey of the 126 non national London museums within the Accreditation Scheme. In this, the first year of the survey in London, participation from the Local Authority funded museum sector was stronger than other parts of the sector.

The government's 2017 Mendoza Review of the English museum sector highlighted the importance of accurate data to the health of the sector. To date, the key sources of sector data have been generated through reporting to Arts Council England as a function of grant investment for National Portfolio Organisations (previously Major Partner Museums) or through the reporting of nationally sponsored museums to government.

Museum Development is currently working to support a consistent approach to sector data which includes museums across the diversity of governance and funding sources operating within the sector.

Over the coming years analysis of this data will provide a comprehensive and collective understanding of the museum sector to support advocacy, benchmarking and highlight trends.

Response rate

- 48 Accredited non-national museums in the capital responded to the first London Annual Survey of Museums.
- This equates to a 38% response rate from London non-National museums within the Accreditation scheme

Audiences

- A total of 3,876,653 visits in 2017-18 based on responses received
- Responding museums held a total of 4,206 activities and events that engaged 222,866 participants

Economic impact

- Visits to responding museums represented around £61,339,109 of gross visitor impacts
- There were at least £9,955,117 of direct, indirect and induced impacts as a result of spend on goods and services by responding museums
- At least 766 Full Time Equivalent (FTE) direct, indirect and induced jobs were supported by responding museums

Online engagement

- 69% of respondent museums have their own website and 85% used social media to engage with audiences

Educational engagement

- Respondent museums delivered 6,112 learning and outreach activities engaging 208,638 participants

Financial operations

- £10,641,596 was generated by responding museums in earned income (including admissions, retail, catering, events, hospitality, educational and other earned income from trading, e.g. property rental)
- £8,356,993 received in regular public funding (including ACE MPM/National Portfolio funding)
- £979,186 received in grant funding
- £3,208,627 received in contributed income (including all money received in donations, friends members/schemes, any sponsorship income, corporate membership, or other non-earned income)

Workforce – volunteers

- 2,085 active volunteers in 2017-18 ranging from 1 to 345 volunteers per responding museum
- Volunteers contributed a total of 124,185 hours to responding museums in the region, worth around £900,000

Workforce – paid staff

- Responding museums employed 724 paid staff equating to 525 full time equivalents

Introduction

This report presents the findings of London Museum Development's first Annual Survey of Museums.

The survey was developed in the South West in 2012 to establish a baseline of sector data and, in 2017-18, is being used to analyse and report on trends in eight of England's nine regions.

Findings from the data can contribute to estimates of the social and economic impacts of museums. It can also help inform how London Museum Development, and other participant Museum Development services, deliver support to museums. The data within this report can enable museums to benchmark themselves against a range of comparators.

The survey has been developed and delivered by South West Museum Development (SWMD) with the intention of providing consistent data capture across multiple regions to enable more effective advocacy and benchmarking. Survey questions were developed in consultation with museums and local authorities and incorporate approaches from pre-existing data collection exercises developed in other regions.

The survey questions have been adapted to align with Arts Council England's annual survey of Major Partner Museums and National Portfolio Organisations.

SWMD has been commissioned to deliver the first London Museum Development Annual Survey of Museums, collecting data for the period 1 April 2017 to 31 March 2018.

Survey method

The survey was sent to all 126 non-National museums in the London region who are fully Accredited, provisionally Accredited or formally Working Towards Accreditation. The survey was promoted via London Museum Development's website and blog, through targeted e-bulletins, Museum Development Officers and at local museum networks across London. Museums were given the option of either online completion or a paper copy of the survey. Multi-site organisations were supplied with a bespoke form to provide a response as a whole organisation; how this data has been incorporated into the report is highlighted on the following page.

The survey asks museums to provide data for the 2017-18 financial year. Financial data can be provided for a different financial period, e.g. calendar year, which museums are asked to indicate; all other data must be for the 2017-18 period. 67% (31) of responding museums reported all data for 1 April 2017 -31 March 2018.

The survey is divided into five sections:

- Audiences
- Educational engagement
- Financial operations
- Workforce
- Equality, diversity and inclusion

LONDON MUSEUM DEVELOPMENT

Sample and response

38% (48) of London museums within the Accreditation scheme responded to this first survey. There are 126 non-National Accredited museums in the capital; the number of Accredited museums is taken from the Accreditation statistics for April 2018. 4% (2) of museums are formally Working Towards Accreditation.

The 20 Accredited National museums in London are not included within this survey as they report directly to their sponsoring government department. The collection and analysis of National museum data is well documented and understood. Whilst the National museums play a unique role in London in terms of economic impact and scale of provision, this exercise is to focus on non National provision and reflects the current lack of a consistent data set for non Arts Council funded, non National museums across England.

Data collection from museum services who operate multi-site and/or co-located museum sites was undertaken using a bespoke form. The form was designed to enable participation by organisations who collect a blend of both service-wide and site-specific data, most typically around educational activities, financial operations and workforce.

This approach enables a better understanding of data and increased accuracy to inform analysis. The core premise of the survey is determined by individual Accredited museum sites as determined by the Accreditation Scheme.

Site-wide data, which is collected centrally by the organisation rather than at site-level, has been attributed to individual sites based on a ratio of audience numbers to enable a consistency of approach across the data provided. For multi-site responses, adjusted data has been recorded as 'estimate' to reflect this intervention.

Where a single museum site includes more than one Accredited museum collection, the organisation has been consulted in order to provide an estimate of the percentage of visitors allocated to each respective site or, where this is not possible, data has been included as a single site and the overall total has been adjusted accordingly. Five multi-site organisations provided survey returns, representing 19% (9) of the 38% (48) return rate. 10% (5) were Local Authority run and 8% (4) were Independent.

In this, the first year of the survey, the response rate from Local Authority-funded services was higher than other parts of the sector with 83% of Local Authority-funded services participating.

When considering the responses, the following should be kept in mind:

- Not all museums responded to every question
- Percentages have been rounded to the nearest whole number
- 'Respondent' or 'Museum' is every museum who submitted a response
- 'Accredited museums' are the 126 non-National museums in London
- Where differences are small and response levels low, care must be taken when interpreting the data
- Budget data must be viewed as approximate or indicative as different methodologies are used by museums and a number of museums operate a different financial year to April – March

There were two additional responses to London Museum Development's survey, however these were from non-Accredited museums who are, regrettably, not included within the analysis undertaken for this report. London Museum Development would like to thank these, and all, museums for submitting their survey and for supporting the collection of sector data in London. The data will contribute to regional and local understanding of the museum sector in London.

LONDON MUSEUM DEVELOPMENT

Profile of respondents

38% (48) of the 126 non National Accredited museums responded to this year's survey. A list of respondent museums is included at the end of this report. The response rate, in this first year, is primarily comprised of Independent (34% (26 of 77) of Independent) and Local Authority (83% (19 of 23) of Local Authority) museums. The figures shown here present the variation between the various types* of London's Accredited museums and the respondent museums.

London is also home to 20 National (government sponsored) museums; these museums were not included within the survey and are therefore not represented in the survey response. The reach and impact of national museums across London and the rest of the country is already well articulated and understood in comparison to other segments of the sector.

Museum opening arrangements

Museums were asked to provide details on their typical opening arrangements:

- 81% (39) reported that they were open all year round
- 6% (3) reported that they were closed part of the year as regular seasonal closure
- 10% (5) of museums open by appointment only – 1 for just part of the year, and 4 all year round
- 4% (2) of museums were closed for the year/part of the year for redevelopment, refurbishment and/or repair

**Type of museum used here is defined by the UK Museum Accreditation Scheme.*

Figure 1: All London Accredited museums by museum type, including National (DCMS sponsored) museums

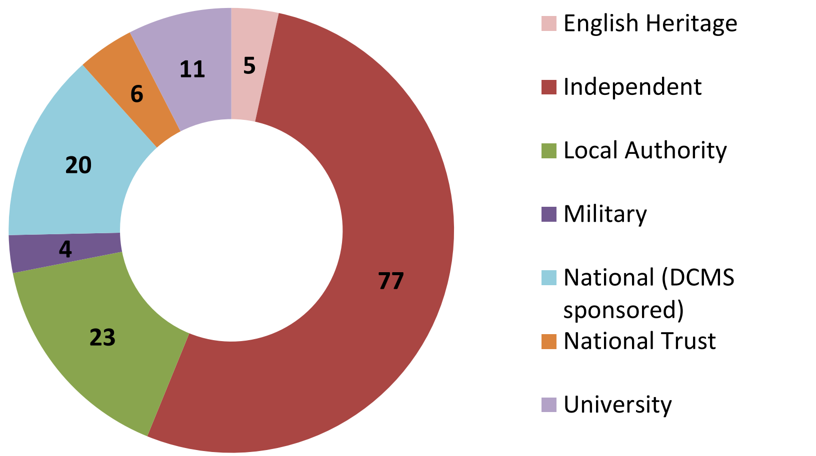
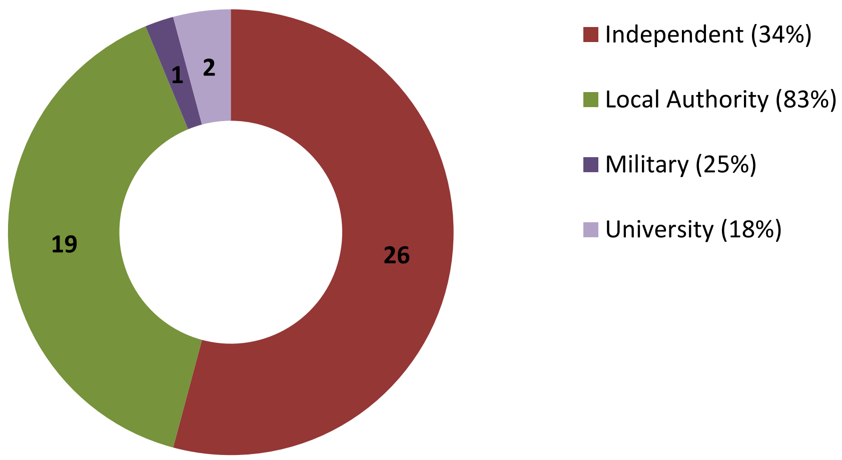


Figure 2: All respondent museums by museum type



Respondents by size

Almost half of all the respondent museums fall within the Medium category (50%) and a third (33%) fall within the Small museum category. Local Authority (LA) museums respondents provided the most representative sample (83%) of a single museum type in the survey. Local Authority museum respondents are highlighted in Figure 3.

For the purpose of this report the size of a museum has been determined by the reported visit numbers. Four bands provide simple categories:

- Small museum - 9,999 and under visits per annum
- Medium museum - 10,000 – 49,999 visits per annum
- Large museum - 50,000 – 99,999 visits per annum
- Extra Large museum - 100,000+ visits per annum

Geographic distribution

The response rate from outer London areas is higher, in part, due to the levels of survey response from Local Authority Museums which represent 40% of the total response from museums and 83% of respondent by type.

Figure 3: Respondents by museum size across all museums and LA museums

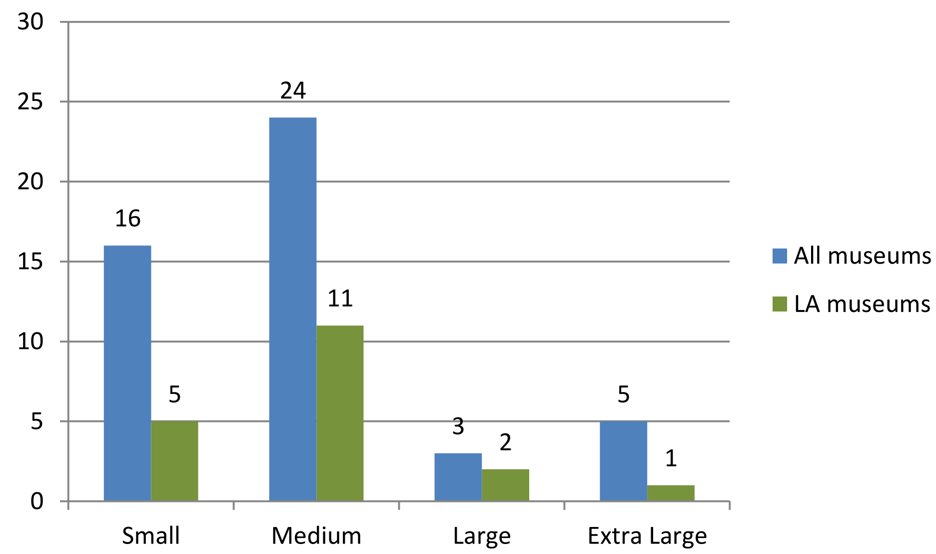


Figure 4: Respondents by sub-region

Sub-region	No. of respondents/no. of Accredited museums	Percentage return rate
Central London	**18 of 68**	**26%**
All Outer London	**30 of 58**	**52%**
East (Outer) London	9 of 17	53%
North (Outer) London	7 of 7	100%
South (Outer) London	10 of 22	45%
West (Outer) London	4 of 12	33%

LONDON MUSEUM DEVELOPMENT

Audiences

This section looks at overall visitor figures, visits by children and online engagement for 2017-18 of respondent museums.

Total visit figures

A total of 3,876,653 visits were made to museums in 2017-18 **b**ased on 98% (47) of responses received. Visit figures in the data are heavily influenced by the five extra large museums with 100,000+ visitors per annum; as a result 10% (5) of museums account for 78% of all visits. 69% (33) of museums provided actual figures and 31% (15) provided estimated figures.

One respondent museum was unable to provide visit figures for 2017-18 because they were closed for part of the year for redevelopment. Secondary data for visit figures, was similarly not available for this museum.

Figure 5 presents visit figures for the 47 museums providing data.

- 5 Extra Large museums received an average of 605,824 visitors
- 3 Large museums received an average of 60,490 visitors
- 24 Medium museums received an average of 25,826 visitors
- 15 Small museums received an average of 3082 visitors

Figure 6 presents visit figures of the 47 museums providing data.

- 26 Independent museums received an average of 90,298 visitors
- 18 Local Authority museums received an average of 29,211 visitors
- 3 Military / University museums received an average of 334,372 visitors

'Other' in figure 6 represents visit figures provided by both Military and University museums.

Figure 5: Visit figures by museum size

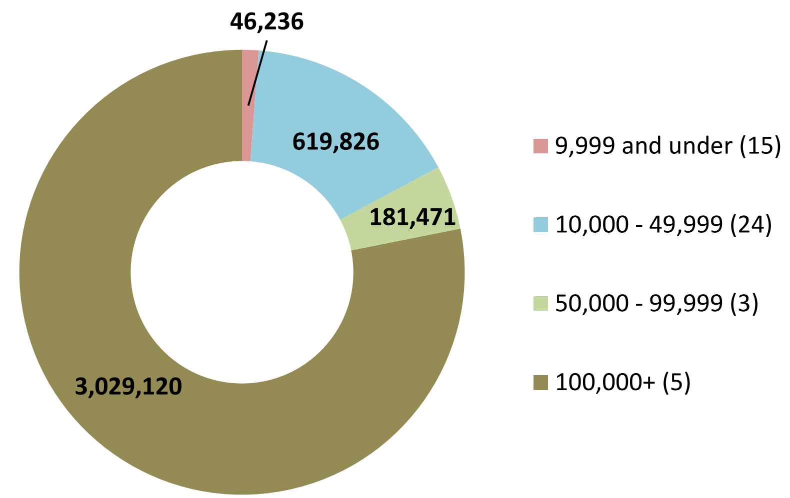
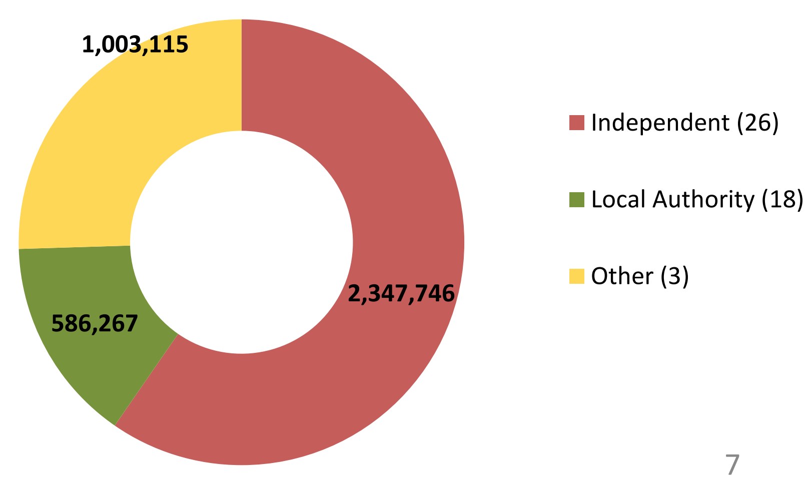


Figure 6: Visit figures by museum type



Visit figures by sub-region

Figure 7 details the breakdown of visits per sub-region. East (Outer) museums reported the highest number of visitors in 2017-18. Half of the respondent museums with 100,000+ visits per annum are located in East (Outer). The higher visits figures reported here are due to the returns provided by the Horniman Museum, Royal Fusiliers Museum (located in the grounds of Tower of London) and the Museum of London Docklands.

Visits by children

63% (30) of respondent museums provided a breakdown of adult and child (under 16) visits. 19% (9) of respondents reported actual figures for both, whilst 44% (21) reported estimates. 572,056 visits by children to museums in London were reported in 2017-18. Based on these responses, children accounted for 15% of all visits.

Where museums reported a breakdown these represented 1,941,760 adult visits and 572,056 child visits. This would estimate child visits to represent 29% of all visits to museums. Data provided from the sample of 9 museums whom provided 'actual' rather than 'estimate' slightly shows a slight increased average of 30%.

- 19 Independent museums reporting a break down of adult and child visits had an average of 30% child visits. This average reduces to 23% for those museums (n.4) reporting actuals rather than estimated data for child visits.
- 8 Local Authority museums reported a breakdown of adult and child visits had an average of 27% child visits. This average increased to 37% for those museums (n.4) reporting actuals rather than estimated data for child visits.

There was insufficient data provided from other museum types.

Figure 7: Visit figures by sub-region

Sub-region	Total visit figures	Percentage of reported regional visit figures
Central London	**1,117,641**	**29%**
All Outer London	**2,759,012**	**71%**
East (Outer)	2,366,510	61%
North (Outer)	263,874	7%
South (Outer)	78,752	2%
West (Outer)	49,876	1%

Figure 8: Visits by children by museum size

Museum size	Total visits by children	Average of child visits by size	Sample	Child visits as % of total visits
9,999 and under	9,114	911	10 of 16	20%
10,000 – 49,999	76,524	5,466	14 of 23	12%
50,000 – 99,999	17,788	8,894	2 of 3	10%
100,000+	468,630	117,158	4 of 6	15%
All museums	572,056	NA	30 of 48	

Economic impact of visits

Museums make an important contribution to the regional economy, generating a range of fiscal and societal benefits, and particularly helping to attract tourism. In 2017, 19 of the top 20 most visited free attractions and 15 of the top 20 paid for attractions in London were museums and historic properties, according to Visit England's *Annual Survey of Visits to Visitor Attractions 2017* . Twenty-five of these attractions are Accredited museums.

In order to estimate the economic impact of visits to museums, the Association of Independent Museum's (AIM) visitor spend calculators has been applied here. Unlike the English regions, the spend assumptions are not distinguishable per sub-region. London has a singular spend assumption which has been applied here. The results of this calculation are conservative as only the economic impact of 'Local' and 'Day' visits have been used; in order to apply the economic impact of overnight stays a more in depth visitor survey would be required. This means that the overall economic value of visits is likely to be higher due to the higher levels of visitor spend associated with overnight visits. The current application of the AIM assumed visitor spend is considered a pragmatic approach which balances the effort of contributing museums with the robustness of calculating economic impact whilst maintaining high levels of participation across the sector.

AIM's Economic Impact Toolkit was developed by consultants DC Research to help museums express the gross impact of visits to their museum in terms of economic value. This toolkit can be used by individual museums but can also help to indicate the wider economic value of museums as well.

Figure 9: AIM Economic Impact Toolkit assumed 'Local' and 'Day' visitor spend by Central and Outer London and by Museum type

Sub-region	'Local' visitor assumed spend at £20.40	'Day' visitor assumed spend at £40.80	'Gross' visitor assumed spend
Central London	£6,206,154	£12,412,308	£18,618,462
All Outer London	£14,240,216	£28,480,431	£42,720,647
Independent	£12,284,068	£24,568,137	£36,852,205
Local Authority	£3,270,122	£6,540,245	£10,427,225
Military/University	£4,892,179	£9,784,357	£14,676,536

Using this toolkit the gross visitor impact was £61,339,108 on the London Economy based on the visit data provided by museums:

- There was a reported £20,446,369 in 'local' visitor spend in 2017-18
- There was a reported £40,892,739 in 'day' visitor spend in 2017-18

Economic impact calculation

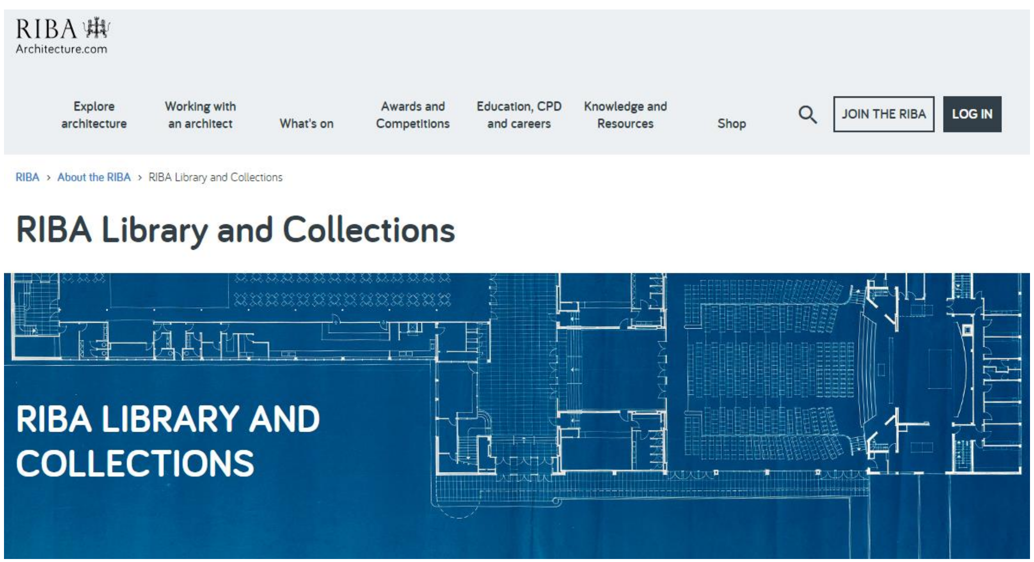
- This calculation takes the number of adult visits to a museum, establishes the average ratio of local and day visits and multiplies these by average visitor spend assumptions, both developed by DC Research from regional and national tourism datasets.
- Total adjusted adult visits is estimated to be 3,006,660 based on the adult/child ratio of 76:24 for museums with 9,999 visits and under; 79:21 for museums with 10,000 – 49,999 visits; 84:16 for 50,000 – 99,999 visits; and 77:23 for museums with 100,000+ visits per annum.

Online engagement

Advances in digital technology in recent years offer museums greater opportunities for potential new forms of engagement beyond the physical visit. Initiatives such as 'Museum Selfie Day' and 'Ask A Curator' enable museums to get creative online by combining history and cultural experience with 21st Century trends.

Websites

68% (33) of respondent museums have their own website. Whilst 32% (15) of museums reported that they did not have their own website, the majority are featured on their host organisations website, or their parent organisation's website, such as the British Architectural Library Drawings and Archives Collection, which is part of the Royal Institute of British Architects, as shown below.



40% (19) of respondents reported a total of 1,989,325 unique visits to their websites in 2017-18.

Social media

Museums were asked to provide information on whether they used social media to engage with audiences and the number of subscribers or followers that they had across their social media platforms.

33% (41) of museums stated that they used social media to engage with audiences with platforms including Facebook, Twitter and Instagram most frequently cited. Museums reported an estimated 1,090,770 subscribers or followers.

Visit England's *Annual Survey of Visits to Visitor Attractions 2017* report stated that platforms such as Pinterest and Instagram have seen the biggest growth in usage by visitor attractions. 44% of these attractions are now using them, compared to 22% in 2015. Facebook and Twitter are still the most popular platforms, being used by 85% and 69% of attractions respectively. These findings from Visit England are broadly consistent with the data reported by museums in London.

13% (6) of respondents reported that they did not use social media. Of these, only 4% (2) reported that they had their own website and therefore provided some form of online presence with which to engage with their audiences. One museum (representing 2% of returns) did not provide a response to the question on social media.

Education, activities and events

Museums collectively reported engagement with 1,588 schools and educational organisations in 2017-18.

17 Independent museums reported data for both educational on-site sessions and number of participants reported a total of 3505 on-site sessions reaching 105,057 participants.

- On average, each Independent museum delivered 206 on-site sessions attended by a total of 6179 participants; on average, 30 participants attended each on-site session

11 Independent museums providing data on both off-site Educational sessions and participants reported a total of 606 off site sessions reaching 32,802 participants

- On average, each Independent museum delivered 55 off-site sessions attended by a total of 2982 participants; on average, 54 participants attended each off-site session

15 Local Authority museums providing data on both Educational on-site sessions and participants reported a total of 1869 on-site sessions reaching 58172 participants

- On average, each LA museum delivered 125 on-site sessions attended by a total of 3878 participants; on average, 31 participants attended each on-site session

8 Local Authority museums providing data on both Educational off-site sessions and participants reported a total of 109 off-site sessions reaching 9329 participants

- On average, each LA museum delivered 14 off-site sessions attended by a total of 1166 participants; on average, 83 participants attended each off-site session

Figure 10: Activities, events and participants, on-site and off-site

	Total and Sample	Extra Large	Large/ Medium*	Small
No. of on-site sessions	4,040 35 of 48	2,479 (n.4)	1343 (n.20)	218 (n.11)
No. of participants to on-site sessions	212,523 33 of 48	144,731 (n.4)	56,899 (n.18)	10,893 (n.11)
No. of off-site sessions	166 20 of 48	71 (n.10)	53 (n.7)	48 (n.6)
No. of participants to off-site sessions	10,343 19 of 48	7,537 (n.4)	1163 (n.10)	1643 (n.5)

	Total	Sample	Extra Large	Large/Medium*	Small
No. of on-site sessions	5,395	34 of 48	2,780 (n.4)	2076 (n.20)	535 (n.9)
No. of participants	165,565	34 of 48	86,164 (n.4)	62548 (n.20)	14,916 (n.9)
No. of off-site sessions	717	20 of 48	383 (n.4)	272 (n.12)	62 (n.4)
No. of participants	43,073	21 of 48	25,014 (n.4)	16,217 (n.12)	1030 (n.4)

Fig. 11: Educational sessions and participants, on-site and off-site

* Museum size categories are combined where less than 3 organisations provided data.
The size sample includes data from both sessions and participants for each on and off-site sessions.

Financial operations

Museums are asked to identify both the financial year they operate and the financial period for which they had submitted data.

- 65% (29) of respondents offered financial data for the financial year 1 April 2017 – 31 March 2018
- 13% (6) stated that their financial year runs the calendar year
- 8% (4) operate under different financial terms such as the academic year or July to June, to name but two that were highlighted

The data presented here should be considered a guide, rather than being representative of a specific financial period.

Income

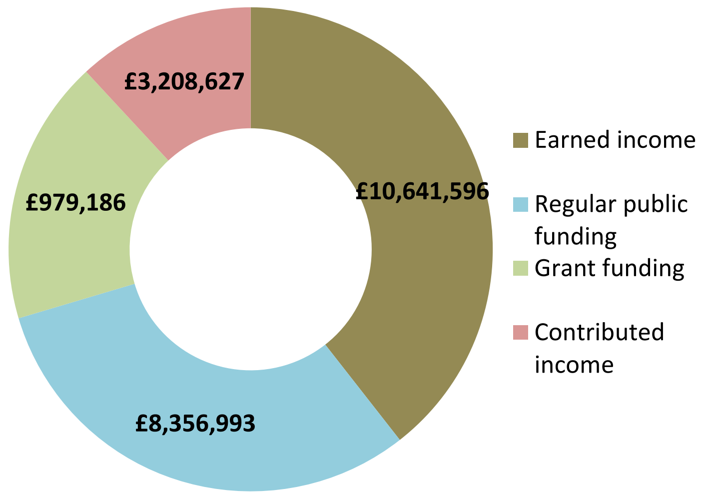
Total income generated across the types of museums is as follows:

- £4,553,373 was generated by Local Authorities (n.15)
- £18,291,153 was generated by Independent museums (n.22)
- £341,876 was generated by University and Military museums (n.2)

In calculating the above total generated income by museum type we can understand this further through looking at the average per museum type.

- £303,558 average total generated income by Local Authority museums (n.15)
- £831,416 average total generated income by Independent museums (n.22)
- £170,938 average total generated income by University/Military museums (n.2)

Figure 12: Breakdown of income across all respondents



81% (39) of respondent museums reported figures for income for 2017-18. The total income generated and received by museums reported in 2017-18 was £23,186,403:

- £10,641,596 in earned income including admissions, retail, catering, events, hospitality, educational and other earned income from trading, e.g. property rental
- £8,356,993 received in regular public funding including Arts Council Major Partner Museum or National Portfolio funding
- £979,186 received in grant funding
- £3,208,627 received in contributed income including all money received in donations, friends members/schemes, any sponsorship income, corporate membership, or other non-earned income

Breakdown of income

Total generated income by museum size breaks down as follows:

- £1,138,524 generated by museums with 9,999 or less visits per annum with an average of £87,579 (n.16)
- £11,161,565 generated by museums with 10,000 – 49,999 visits per annum with an average of £558,078 (n.20)
- £10,886,314 generated by museums with 50,000 – 99,999 and also 100,000+ visits per annum with an average of £1,814,386 (n.6)

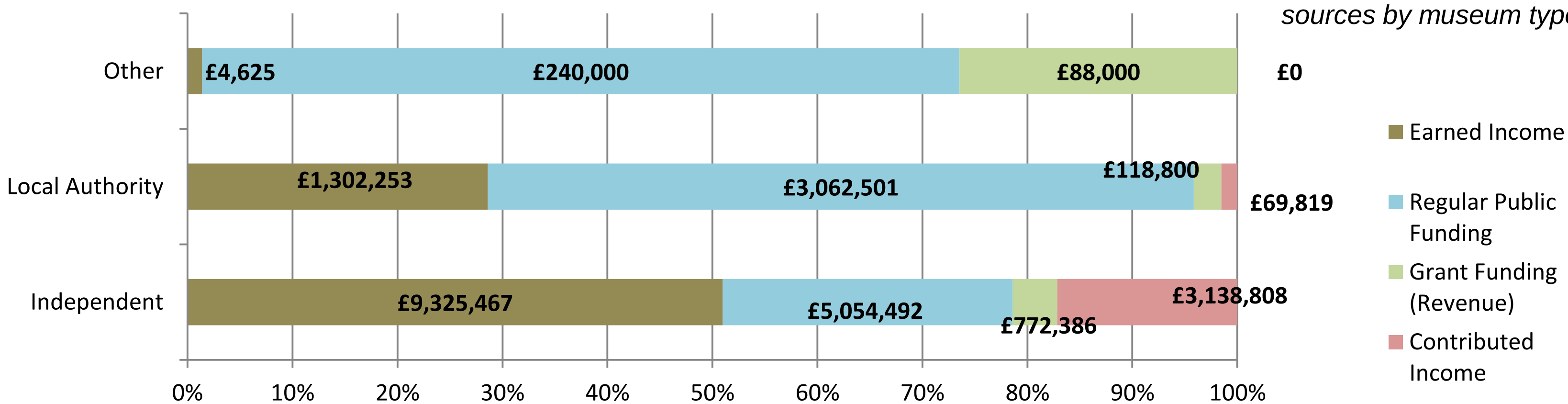
An insufficient number of museums in the 50,000-99,999 category provided a breakdown of income to present data separately for the large and extra-large museums.

29% (14) of respondent museums charge admission. 13 provided financial data and reported a total income across all sources of £10,904,941. Where museums reported that they charged admission seasonally or for some exhibitions, these have been categorised within overall charged admission. 54% (26) of museums whose admission is free reported a total income of £12,281,461 and an average across the group of £472,364.

Figure 13 shows the breakdown of sources of income by museum type. The category 'Other' includes Military and University. For Local Authority (LA) and Independent (Ind) respondent museums there was sufficient data to identify averages:

Earned income - LA (n.15) average £86,817, Ind (n.21) average £444,070
Public funding - LA (n.10) average £306,250 Ind (n.10) average £505,449
Grant income - LA (n.3) average £39,600, Ind (n.11) average £70,217
Contributed income - LA (n.8) £8727, Ind (n.18) average £174,378

Figure 13: Breakdown of income sources by museum type



Admission charges

Museums were asked whether they charged for admission:

- 92% (44) of museums responded to this question
- 23% (11) reported that they charged for admission in 2017-18
- 63% (30) offered free entry all year round
- 6% (3) said that they charged seasonally/for some exhibitions

21% (10) of museums provided information on adult admission charges, and 21% (10) also provided information on admission charges for children. The admission charge for an adult ticket ranged between £0.50 and £10, with an average of £6.45; the admission charge for a child ticket ranged between £0.20 and £5, with an average of £3.36.

Retail income

Retail is a valuable additional source of income to many museums and can directly support the visitor experience.

71% (34) of respondent museums in London have a shop or a retail space. Based on the data from 65% (31) of museums who reported retail revenue the total retail income for 2017-18 was £1,755,942.

The average retail spend per head is an important indicator used to assess the effectiveness of a museum's retail offer. 65% (31) of museums provided the required data for this to be measured. To ensure consistency with the analysis on the previous section looking at admissions, museums who charge admissions seasonally or for exhibitions have been included within the category 'charged admission' in Figure 14.

Figure 14: Average retail spend per head by museum size and by charging model

	Average	Lowest	Highest	Sample
9,999 and under	£0.65	£0.06	£1.86	8
10,000 – 49,999	£0.94	£0.02	£3.17	16
50,000 – 99,999 and 100,000+ combined	£0.58	£0.08	£1.22	6
100,000+	£0.55	£0.23	£1.22	4
Free admission	£0.45	£0.02	£1.86	20
Charged admission	£1.34	£0.16	£3.17	11

Catering income

Catering can provide another important source of income for many museums, and a cup of tea or a slice of cake can really add-value to the visit.

- 17% (8) had an in-house café/refreshment facilities
- 15% (7) contracted out their café/refreshments
- £647,042 was generated in catering income in 2017-18

Donations

Museums were asked to provide information on their donations in order to generate an average donation per visitor from the data. The approach for calculating donations income per head has been to divide total donations reported by total visitor numbers.

48% (23) of museums provided information on their donations. The lowest value for donations per head was £0.01, whilst the highest was £1.05. Museums generated £523,993 in donations income. Museums in the 'Large' category of 50,000-99,999 did not report data for donations. There is insufficient data to present data for types of museums beyond Independent and Local Authority.

Similarly to the previous two sections, charged admission in figure 15 also includes museums who charge seasonally or for some exhibitions only.

Figure 15: Average donations per head by museum size,type and charging model

	Average	Lowest	Highest	Sample
9,999 and under	£0.37	£0.08	£1.05	8
10,000 – 49,999	£0.10	£0.01	£0.54	11
100,000+	£0.20	£0.10	£0.27	4
Free admission	£0.22	£0.01	£1.05	15
Charged admission	£0.20	£0.01	£0.64	8
Independent	£0.26	£0.01	£1.05	17
Local Authority	£0.07	£0.01	£0.15	6

Impact of spend on goods and services

Direct, indirect and induced impacts

DC Research identify, within the toolkit they have developed for AIM, that estimating economic impact is a specialised and technical task which can often involve a range of complex assumptions. The methodology applied here does not represent a full independent economic impact assessment but does provide an evidence based estimate which all museums, irrespective of size or governance type are able to participate in. All of the calculations presented within the report apply museum specific data provided within the current year's return and ,where relevant, alongside secondary data from Visit England sources.

Using the AIM Economic Impact Toolkit we can estimate the economic value of museum spend on goods and services:

- There was at least £9,960,819 of direct, indirect and induced impacts in London as a result of spending on goods and services by museums.

This calculation is based on museum expenditure figures, excluding staff spend, from 58% (28) of respondent museums and takes into account 'leakage', 'displacement ', 'deadweight' and multiplier factors using estimates developed by DC Research:

- **Deadweight** – value or impact that would have occurred anyway.
- **Displacement** – the proportion of museum value or impact accounted for by reduced value or impact elsewhere in the local area.
- **Leakage** – the proportion of value or impact that benefit those outside the museum's local area.

Capital investment

Capital investment is important in enabling museums to improve or expand their business in order to ensure that they can provide engaging spaces for audiences and respond to changing visitor demographics and expectations. While you would not expect capital investment to be consistent year on year it can provide a useful indicator of the long term strategic investment in the sector.

25% (12) of museums specified that they had received capital investment in 2017-18, totalling £8,223,050. 51% of capital investment was generated by Independent museums (n.7) and 47% was generated by Local Authority Museums (n.4).

Figure 16: Direct, Indirect and Induced Impacts 2017-18

	Value	No. of responses
Central London	£3,427,429	12
All Outer London	£6,527,688	17
Independent	£7,301,374	17
Local Authority	£2,518,957	11
Military/ University	£134,786	1

Expenditure and staff costs

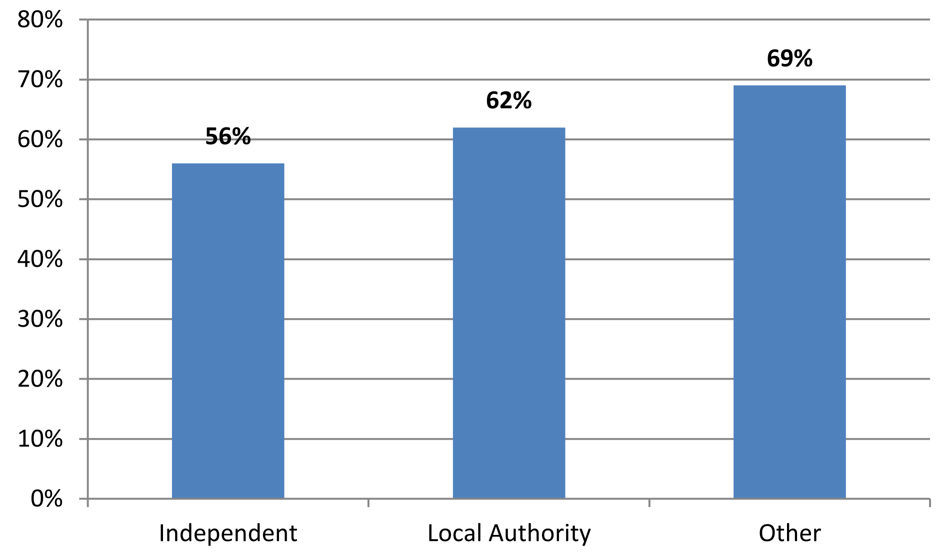
58% (28) of responses were received from museums and museum services that employ staff and provided figures for both total expenditure and expenditure on staff costs. On average, spending on staff accounted for 59% of total expenditure, which breaks down as follows:

There was a reported total of £9,715,335 expenditure on staff costs by museums in 2017-18:
- 17% (8) of museums spent an average of between 30% - 50% of their total expenditure on staff costs
- 27% (13) of museums spent an average of between 51% - 70% of expenditure on staff costs
- 8% (4) of museums spent an average of between 75% - 90% of expenditure on staff costs
- 4% (2) of museums spent an average over 95% of expenditure on staff costs

In Figure 17, 'Other' includes Military and University museums. Whilst these museum types represent the smallest number of respondents to this part of the survey they show the highest average spend on staff costs.

It is worth noting that museums operating within organisations that provide additional services alongside the museum may have limited access to accurate data on staffing expenditure related to centrally provided services such as finance, HR, legal and IT support. This data can provide a guide rather than an accurate presentation of staffing costs where comparing across types of museums.

Figure 17: Average expenditure on staff costs by museum type



LONDON MUSEUM DEVELOPMENT

Workforce

Paid staff

Museums were asked to provide information on both the total head count of staff employed by the museum at its peak in the year and the number of Full Time Equivalents (FTE) during 2017-18. 73% (35) of museums provided data on both these questions.

- Museums employed a total of 725 paid staff
- Museums employed 524.58 FTEs
- 52% (25) of museums reported actual figures for paid staff, whilst the remaining 21% (10) reported that their figures were estimates
- 56% (27) reported that they employed between 1 – 20 members of paid staff
- 10% (5) reported that they employed between 21 – 45 members of paid staff
- 6% (3) reported that they employed over 90 members of paid staff, with 2% (1) employing over 100 and another 4% (2) employing over 200

This information can be further understood in presenting the average number of paid staff and FTE by museum type.

- Independent museums (n.17) employed an average of 33 staff (25 FTE)
- Independent museums (n.17) reported a total of 566 paid staff
- Local Authority museums (n.17) employed an average of 9 staff (5.5FTE)
- Local Authority museums (n.17) reported a total of 149 paid staff
- Military and University museums (n.2) employed an average of 5 staff (2.9FTE)
- Military and University museums (n.2) reported a total of 10 paid staff

Whilst a high level of paid staff was reported within the 15 independent museums it should be noted that there is significant variation within this group as shown below.

- Independent extra large-sized museums (n.3) employed an average of 107.73 FTE
- Independent medium-sized museums (n.8) employed an average of 12.05 FTE
- Independent small-sized museums (n.5) employed an average of 1.16 FTE

Employment impacts

Using the AIM Economic Impact Toolkit we can estimate the value of museum employees to the London regional economy:

- These sample museums created 766 full time equivalent direct, indirect and induced jobs across the region

This calculation is based on FTE employment data, taking into account ‘leakage’ (those that do not live locally), ‘displacement’, ‘deadweight’ and multiplier factors using estimates developed by DC Research.

Equality, Diversity and Inclusion

Museums were also asked an additional question around their workforce - both paid and voluntary - focusing on equality, diversity and inclusion. Museums were asked whether or not they had an Equality and Diversity Action Plan:

- 40% (19) reported that their museum organisation did have an equality and diversity action plan
- 33% (16) reported that their museum organisation did not have an equality and diversity action plan
- 6% (3) of respondents reported that they did not know, whilst 21% (10) did not provide an answer

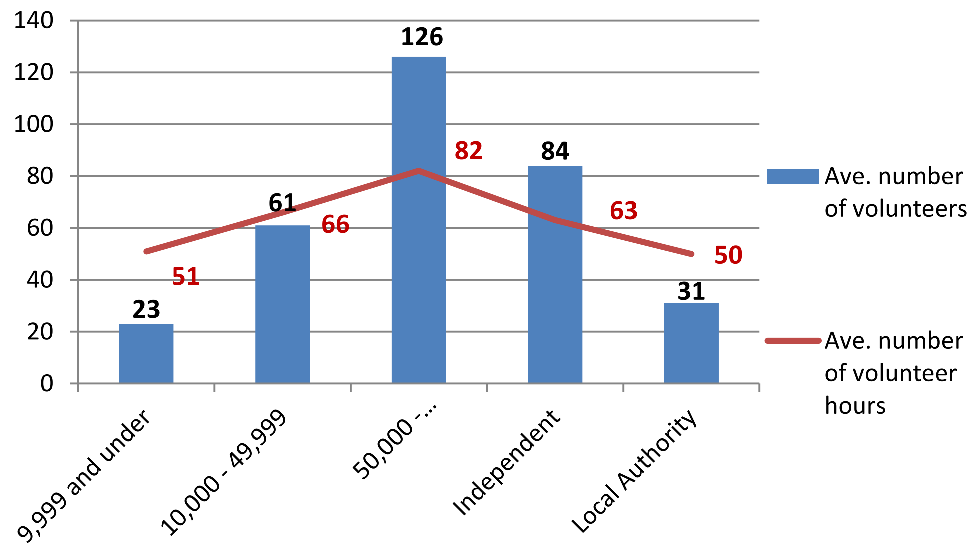
Volunteers

Volunteers are a vital part of the museum workforce. The involvement of loyal volunteers make a significant impact to museums and are often the key to operating a wide range of services irrespective of the size, location or type of museum provision. The role of volunteering in museums encompasses all elements from enhancing the visitor experience, caring for and documenting the collections, business planning and managing finance. Many museums also rely on voluntary trustees to help guide the governance of a museum and support resilience.

- Museums reported a total of 2,085 volunteers, based on the responses of 77% (37) of museums
- This ranged from 1 to 345 volunteers per museum
- The total number of volunteer hours recorded was 124,185 by 63% (30) of respondent museums
- 23% (11) of museums reported actual figures for volunteer hours, whilst 52% (25) reported that their figures were estimates
- Volunteer hours are estimated to have contributed almost £900,000 to the regional economy

The higher proportion of estimated figures suggests that many museums may have not implemented recording systems to enable the accurate reporting of volunteer hours. This, combined with the nature of some volunteer roles delivered off site, means that the full contribution of volunteer time, and therefore its economic impact, maybe underestimated.

Figure 18: Average number of volunteers per museum and average number of contributed hours per volunteer by museum size and museum type



LONDON MUSEUM DEVELOPMENT

London support

Museums were asked about support or advice they had received from London Museum Development, here is a sample of what they said:

'[We meet with our MDO] regularly and she offers good support and advice; she is available when required and has shared some great case studies on relevant topics.'

Brent Museum and Archive

'Always reliable, up-to-date and useful training events and networking.'

British Dental Association Museum

'Excellent as always. Doing our best under difficult circumstances, so much support and advice received in the past, which we are gradually implementing. '

Bromley Museum at Bromley Historic Collections

'Excellent – without such programmes and access to such expert advice we would be very isolated as a small, independent museum, and could become static and atrophy in worst case scenarios.'

Dr. Johnson's House

'Helpful and timely advice when needed. Great training programme offered.'

Fulham Palace

'We have really appreciated the support offered, with fantastic training and the opportunity to easily get in contact with our MDO. We look to our MDO to offer opinions and contacts in other organisations who have undertaken similar projects [to us]. We also appreciate our MDO pointing us towards funding sources and opportunities.'

Gunnersbury Park Museum

'[We are] in the process of relocation as part of a larger development. The LMD team have been invaluable in providing advice with regards to setting up a pop-up museum; applying for HLF grants, audience development and networking advice. Meetings, such as the Capital Projects Group, have been extremely beneficial for us to gain information, advice and to be able to speak to our peers.'

London Fire Brigade Museum (LFB Pop-up Museum)

'Extremely helpful and useful, and much needed.'

Museum of Wimbledon

'The MDO network has been unfailingly positive in offering training opportunities that would otherwise not be possible on the museum's limited budget.'

Museum of the Order of St. John

'[The Digital Engagement Officer] has a very clear and enjoyable approach, and provides lots of useful examples.'

Kingston Museum

'Lots of support and advice […] during store build in terms of collections care practice.'

Greenwich Heritage Centre

'Fantastic. As a newbie to London museums I felt well-connected quickly and found the support I needed from the MDO team and those they put me in touch with.'

Museum of the Royal Philatelic Society London

LONDON MUSEUM DEVELOPMENT

With thanks to the following museums for participating

Central

British Architectural Library – Drawings and Archives Collection (RiBA)
British Architectural Library – Library and Photographic Collection (RiBA)
British Dental Association Museum
Burgh House and Hampstead Museum
Cartoon Museum
Charles Dickens Museum
College of Optometrists
Dr. Johnson's House
Estorick Collection of Modern Italian Art
Handel and Hendrix Museum (Handel House Museum)
Islington Heritage Service
London Fire Brigade Museum (LFB Pop-up Museum)
Museum of London (MoL)
Museum of the Order of St. John
Museum of the Royal Philatelic Society London
Old Operating Theatre and Herb Garret
Royal Hospital Chelsea Museum
The Charterhouse

East (Outer)

Greenwich Heritage Centre
Hackney Museum
Hall Place and Gardens (Bexley Heritage Trust)
Horniman Museum and Gardens
Museum of London, Docklands (MoL)
Redbridge Museum
Royal Fusiliers Museum London
The Fan Museum
Valence House (LBBD)

North (Outer)

Barnet Museum and Local History Society
Bruce Castle Museum
Enfield Museum Service
Museum of Domestic Design and Architecture
The View (Epping Forest Collection)
Vestry House Museum (LBWF)
William Morris Gallery and Brangwyn Gift (LBWF)

West (Outer)

Brent Museum and Archive
Fulham Palace
Gunnersbury Park Museum
Hillingdon Local Studies, Archives and Museum

South (Outer)

Bromely Museum at Bromely Collections
Dorich House Museum
Honeywood Museum (LBS)
Kingston Museum
Little Holland House (LBS)
Museum of Army Music
Museum of Richmond
Museum of Wimbledon
Orleans House Gallery
Wandle Industrial Museum

Multi-site organisations

LBBD – London Borough of Barking and Dagenham
LBS – London Borough of Sutton
LBWF – London Borough of Waltham Forest
MoL – Museum of London
RiBA – Royal Institute of British Architects

Front cover: museums responding to the 2018 London Museums Survey

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For further information on this report or the London Museum Development programme please contact Ben Travers, Programme Manager, London Museum Development: btravers@museumoflondon.org.uk
https://www.museumoflondon.org.uk/supporting-london-museums

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