LONDON MUSEUM DEVELOPMENT

Museums survey 2019

Headlines

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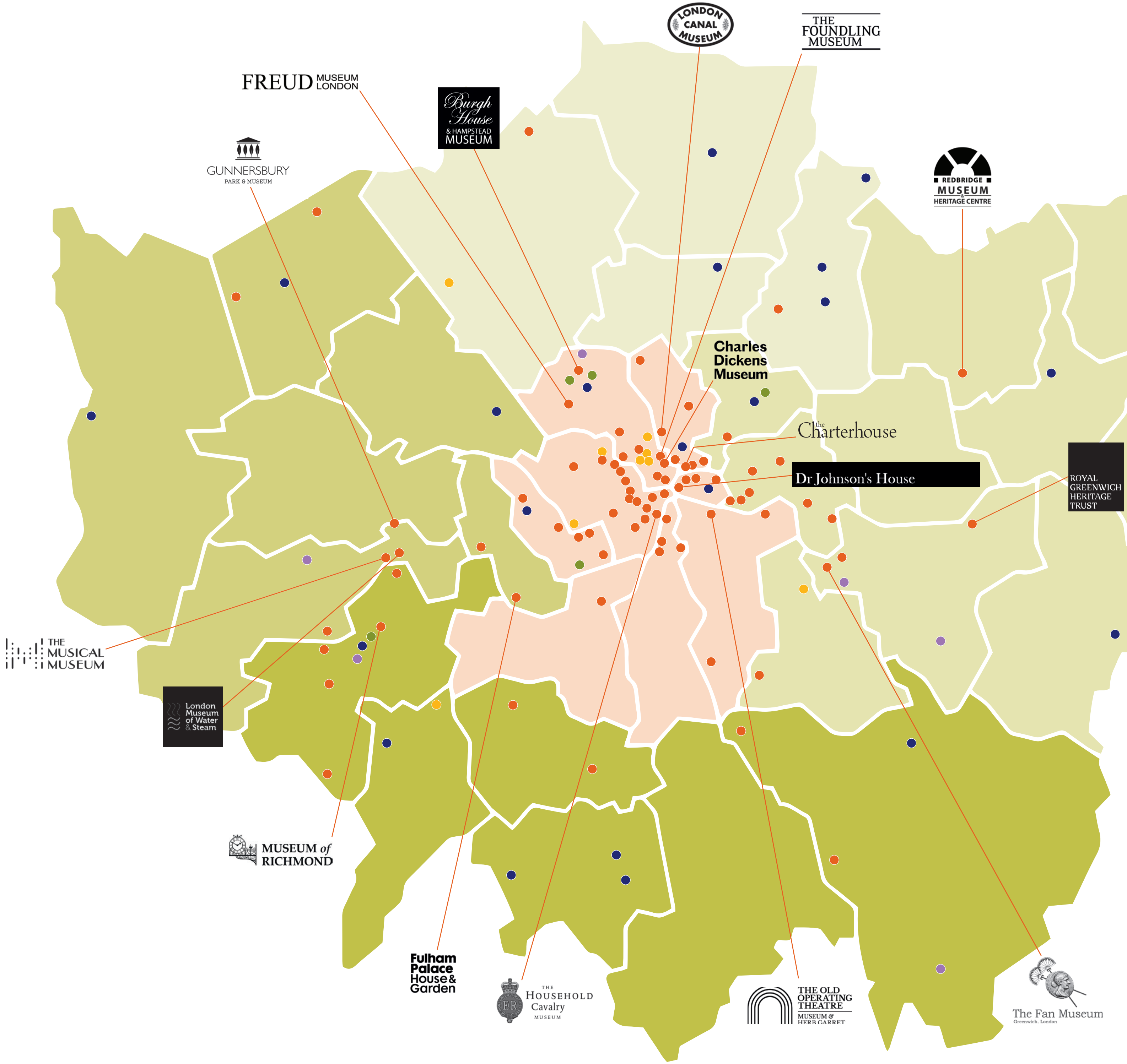
MUSEUM OF LONDON

Accredited non-national museums in London



This map shows the distribution of the 124 non-national museums in London participating in Arts Council England's Museum Accreditation scheme. It shows the division of the 32 Londonboroughs and Corporation of London between the Centralsub-region and the four outer London sub-regions of North, South,East and West. The map is based on London Museum Development sub-regions, whose boundaries are very similar to those recognisedby the Greater London Authority.

Independent non-National Portfolio museums

Independent museums outside Arts Council England's national portfolio of funded organisations are particularly at risk of permanent closure due to the effects of the ongoing covid-19 public health emergency. There was an increase this year in the number of these museums responding to the survey. Some of those at most immediate risk from the public health emergency are shown on the map.

Museums Survey 2019 – Headlines

This paper presents the key findings of the second annual survey of the non-national museums sector in London. The data in this and the detailed report on our web site provides a comprehensive understanding of the museum sector in London.

In this second year of the survey across the 124 London non-national museums within the Accreditation scheme, the overall return rate was 48%. This represents a 10% increase in participation from the first year.

The survey recorded total visits to London's non-national museums of 4,198,435. This represents a +2% rise in visitor numbers[1] – this is in line with the findings of Visit England's 2018 survey which reports a visitor increase of +2% across England.

Since this survey was conducted, the museum sector in London has been overtaken by the COVID-19 global pandemic, an unprecedented threat to the whole cultural sector and the wider economy. At the time of writing the sector is continuing to respond to the evolving emergency and government advice. **It is clear the pandemic will have a long-lasting impact on museum visitors, income generation, collections, operations, learning and public programmes**.

Some museums may be able to re-open over the summer of 2020. However, a degree of social distancing is likely to remain in place for some time. Tourism will also take a long time to return to its previous level and there may be public reluctance to visit museums post-lockdown.[2] Severe and ongoing financial impacts are likely.

Museums within local authorities, universities and other large institutions are likely to feel the impact of the pandemic slightly later, from about 2021, as their parent bodies take stock of the financial impact and are perhaps forced to make cuts in services. Museums within Arts Council England's national portfolio have been able to access a greater share of the emergency funding, and so the risks to these organisations have also been mitigated.

The London museums at most immediate risk of insolvency and permanent closure are its non-National Portfolio (non-NPO) independent museums. These comprise 'personality' and other historic houses such as Charles Dickens Museum, Dr Johnsons House, Freud Museum, Burgh House and The Charterhouse. Also niche subject museums like the Foundling Museum, Old Operating Theatre, London Canal Museum and Household Cavalry Museum. **Many of these museums are located in the central boroughs. Here they form a vital part of the 2nd tier London cultural ecology, with a crucial role in supporting local, national and international tourism**.

There are also some independent museums in outer London providing a vital service to their local communities, for instance the Royal Greenwich Heritage Trust, Redbridge Museum, Gunnersbury Park Museum, Fulham Palace and Museum of Richmond. These museums are in trust or other arms-length arrangements with their local authority and also at significant risk.

Entrepreneurial in generating income and innovative in their programmes, many of these museums have become largely self-sustaining. **Yet with the lockdown their loyal customer base has been cut overnight. Living off their reserves and struggling to access sufficient emergency funding, many of these museums are fighting for their lives**. Many may also struggle to re-open due to their reliance on volunteer workers, who may not return in the short to medium term due to ongoing public health concerns.

All in all, these museums and their unique collections are in great peril, and there is the very real possibility of them disappearing from the cultural landscape of London forever. **The publication of the 2019 Annual Survey provides a unique opportunity to celebrate the contribution of these museums to the cultural and wider economic life of the capital, and reflect on what we would all be losing if they closed permanently**.

Points 1-2: see endnotes on page 6

Non-NPO independent museums in London – Overview

This year non-NPO independent museums make up 55% of the total response rate of this survey, with 33 out of 69 (48%) of them responding to all or part of the survey.

Many of them have been **successful in securing significant external capital and/or revenue funding**. Many more have been **successful in diversifying and increasing their earned income from their exhibition and event tickets sales**, as well as **retail and café offer**.

The **infographics summarise the achievements of these independent museums**, and provide an important **glimpse into the vital contribution these non-NPO museums make to the cultural and economic life of the capital**.

Non-NPO Independent museums – the detail

The survey recorded almost **1,650,000 visitors to these museums in 2018-2019** – that's **over 1.6 million visits made to unique collections** and **39% of the total visits** recorded in the survey. The average number of visitors each received was almost **50,000,**[3] with **18% of visits made by children.**[4]

The **economic impact** of the visits reported by these museums can be conservatively estimated at **over £45million**, with an average of **over £1.3million per responding museum.**[5] **Spending on goods and services** by these museums **resulted in another £8.3million of local economic impacts.**[6]

Over 1.7million unique visits were made to websites, signifying a **10% increase** on last year.[7] There were also **over 700,000 subscribers** to Facebook, Twitter, Instagram, Snapchat, YouTube etc. That represents on average **over 87,000 unique website visitors and almost 30,000 subscribers per museum.**[8]

The survey found there was an almost **18% increase in the number of on-site educational sessions** at these museums.[9] Together they delivered **over 1,800 on-site sessions** and **over 250 off-site sessions, engaging over 62,500 participants**. On average each responding museum delivered **almost 100 on-site and off-site education sessions to almost 3,000 participants.**[10]

Non-NPO independent museums also provide other activities, events and sessions for a range of audiences. **Over 2,000 on-site and off-site sessions engaging almost 60,000 participants** were delivered by these museums. On average each responding museum delivered **over 85 on-site and off-site sessions to over 2,500 participants.**[11] Together, these figures showcase the contribution these museums are making in the capital supporting learning across all audiences.

Furthermore, non-NPO independent museums generated a total income of **almost £7million** in 2018-2019, with an **average of over £245,000 per responding museum**. On average each responding museum generated **over £200,000 from earned income**, including **over £150,000 from admission sales** and **over £35,000 from their retail offer**. These museums also received on average **over £90,000 from contributed income** per museum.[12]

Finally, the survey saw a significant increase in the number of hours volunteers contributed to these museums. In total **over 1,500 volunteers contributed almost 200,000 volunteer hours**. Each museum engaged an **average of 57 volunteers, with each volunteer contributing an average of 124 hours.**[13] This underlines the reliance of these museums on volunteers, and the risks they face if this part of their workforce does not return post-lockdown due to ongoing public health concerns.

Points 3-13: see endnotes on page 6

Non-NPO independent museums in London

2018-19

These museums make up **55%** of all responding museums

OVERALL VISITOR FIGURES

Over 1.6 million visits with **50,000** **visitors per museum**

EDUCATIONAL ENGAGEMENT, ACTIVITIES, EVENTS AND SESSIONS

18% of all visits made by **children** alongside an **18% increase** in on-site **educational sessions**

Over **4,000** **educational sessions events and activities** delivered to over **122,500** participants

ECONOMIC IMPACT OF MUSEUMS

at least **£53m** at an average of over **£1.6m** per museum

SELF-GENERATED INCOME

Generated total income of almost **£7million** with an average of **£245,000** **per museum**

Each museum generated **over £150,000** from admission and **over £35,000** from retail sales, and received **over £90,000** from donations, friends and members schemes

ONLINE ENGAGEMENT

10%

10% increase in website visits with **over 1.7m** **unique visitors** and **87,000** visits per museum

VOLUNTEERS AND VOLUNTEER HOURS

1,500

57

200,000

124

Over 1,500 volunteers contributed **almost 200,000 volunteer hours**, with an **average 57 volunteers** per museum each contributing **124 hours**

Front cover
Top Left © Florence Nightingale Museum
Top Right © Museum of Philatelic History at the RPSL
Bottom Left © © London Museum of Water and Steam
Bottom Right © Association of Anaesthetists Heritage Centre

Museums Survey 2019 conducted for London Museum Development by South West Museum Development

Endnotes

[1] When comparing a sample group of 38 museums responding to both years of the survey in 2017-18 and 2018-19 an increase of +2% was reported

[2] The recent findings from ALVA and the poll conducted by IDSOS MORI highlight visitor's uncertainty to visit and outline how uncomfortable they are about the thought of visiting museums, which will pose a continued threat to museums being able to generate income long after lockdown has ended

[3] 33 non-NPO independent museums received 1,649,811 visitors at an average of 49,994 per museum

[4] 33 non-NPO independent museums received 292,098 child visitors

[5] The economic impact of the visits reported by 33 non-NPO independent museums was reported at £45,763,781. Figures are derived using calculators in Association of Independent Museums/DC Research Economic Impact Toolkit

[6] Using the Association of Independent Museums/DC Research Economic Impact Toolkit at least £3,641,215 was spent on goods and services, with £4,683,822 of direct, indirect and induced impacts recorded in London as a result of spending on goods and services by 33 non-NPO independent museums

[7] An increase of 10% was reported by the group of 7 museums providing data in both years. 20 non-NPO independent museums received 1,741,627 unique visitors to their website

[8] 24 non-NPO independent museums had 719,726 subscribers to Facebook, Twitter, Instagram, Snapchat, YouTube etc

[9] An increase of 17.7% was reported by the group of 14 museums providing data in both years

[10] 25 non-NPO independent museums reported delivering 1,892 educational on-site sessions engaging 51,943 participants. 11 non-NPO independent museums reported delivering 257 educational off-site sessions engaging 10,594 participants

[11] 24 non-NPO independent museums reported delivering 1,902 on-site activities, events and sessions engaging 56,872 participants. 13 non-NPO independent museums reported delivering 123 off-site activities, events and sessions engaging 3,037 participants

[12] 28 non-NPO independent museums reported generating a total income from all sources of £6,891,908. 28 museums reported a total earned income (including: £1,959,808 in admissions from 13 museums; £860,428 in retail from 23 museums; as well as catering, events, hospitality, educational and other earned income from trading, e.g. property rental) of £5,633,589. 23 non-NPO independent museums reported receiving £2,130,433 in contributed income (including all money received in donations, friends members/schemes, any sponsorship income, corporate membership, or other non-earned income)

[13] 28 non-NPO independent museums reported a total of 1,599 volunteers contributing a total of 198,443 volunteering hours to their museums