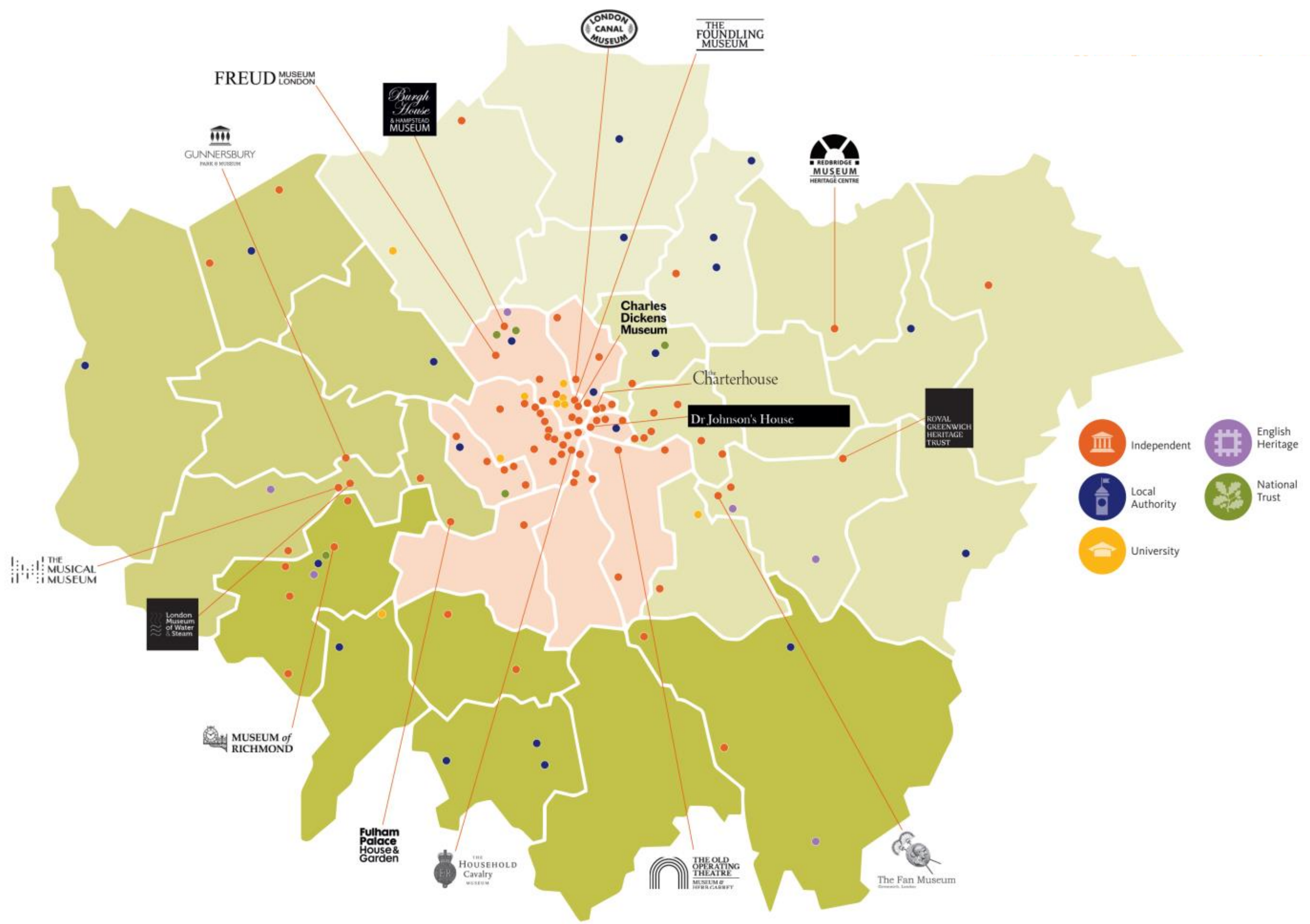
LONDON MUSEUM DEVELOPMENT

Museums Survey 2019



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MUSEUM OF LONDON

DETAILED REPORT

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2018-19 Summary of findings

This is the second survey of the 124 non national London museums within the Accreditation Scheme.

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

In 2019 all nine regions in England have engaged in surveying museums applying the same methodology. Analysis of this data will provide a comprehensive and collective understanding of the museum sector to support advocacy, benchmarking and highlight trends.

Response rate

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

Audiences

- A total of 4,198,435 visits in 2018-19 based on responses received
- 42 responding museums held a total of 6,092 activities and events that engaged 252,008 participants

Economic impact

- Visits to responding museums represented around £117,183,590 of gross visitor impacts
- There were at least £42,333,056 of direct, indirect and induced impacts as a result of spend on goods and services by responding museums
- At least 837 Full Time Equivalent (FTE) direct, indirect and induced jobs were supported by responding museums

Online engagement

- 78% of respondent museums have editorial control of their website and 93% used social media to engage with audiences

Educational engagement

- Respondent museums delivered 9,743 learning and outreach activities engaging 448,943 participants

Financial operations

- £12,396,349 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)
- £23,283,407 received in regular public funding (including ACE MPM/National Portfolio funding)
- £15,740,229 received in grant funding
- £4,759,673 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

- 2,801 active volunteers
- Volunteers contributed a total of 282,059 hours to responding museums in the region, worth around £1.9 Million

Workforce – paid staff

- Responding museums employed 879 paid staff equating to 681 Full Time Equivalents

LONDON MUSEUM DEVELOPMENT

Introduction and survey method

This report presents the findings of London Museum Development's 2018-19 Annual Survey of Museums.

The survey was created in the South West in 2012 to establish a baseline of data and is now being used to analyse and report on trends over a period of time across the nine English regions. Findings from the data can contribute to estimates of the social and economic impacts of museums and also help inform how regional Museum Development providers 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. The survey has remained broadly consistent since 2012-13. In 2019, additional logic was introduced to aid clarity around questions on finance and workforce. Survey questions have been developed in consultation with museums and local authorities and considered approaches from pre-existing data collection exercises from other regions.

Where possible questions have been adapted to align with Arts Council England's previous annual survey of Major Partner Museums and, since 2019, the Annual Survey of National Portfolio Organisations.

SWMD has been commissioned by London Museum Development to deliver the Annual Survey of Museums for the second time in 2018-19.

Survey method

The survey was sent to all non-National museums in the region who are fully Accredited, provisionally Accredited or formally Working Towards Accreditation, as well as being promoted by Museum Development Officers. The majority of museums have participated via the regional online survey. The option to complete the survey via a paper copy was also provided.

Multi-site organisations were given the option to either provide a response as a whole organisation using a bespoke off-line form, or by individual site; museums which provided a multisite response are highlighted on page 24.

Survey questions relating to finance, employment, volunteering and social media have been mapped across to the National Portfolio Organisation (NPO) Annual Survey and NPOs were able to submit their NPO Annual Survey for transcribing to prevent duplication of effort. However a key distinction between the Museum Development survey and the NPO Annual Survey is that the latter captures data at organisational, rather than Accredited museum, level. Where NPO data has been submitted to represent multiple Accredited museums the total value reported has been distributed based on the weighting of audience numbers for each of the Accredited museum sites.

The survey asks museums to provide data for the previous financial year (1 April – 31 March). 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 previous financial year.

The survey was divided into four sections:

- Audiences
- Educational engagement
- Financial operations
- Workforce

LONDON MUSEUM DEVELOPMENT

Sample and response

53% (66) of London museums within the Accreditation scheme responded to this second survey. Six respondent museums were unable to provide audience figures, of which two were due to closure for redevelopment. 48% (60) of museums provided sufficient data for inclusion in the following report. This is a 10% increase in the return rate compared to the previous year. There are 124 non-National Accredited museums in the capital; the number of Accredited museums is taken from the Accreditation statistics for June 2019. 11 of the 124 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. Whilst the National museums play a unique role in London in terms of economic impact and scale of provision, the purpose of this report is to focus on non-National provision and contribute to a consistent data set for non Arts Council funded, non National museums across England.

In 2019 Arts Council England revised the categories for type of governance within the Accreditation statistics. The category of 'Military' has been removed and museums within the category have been reallocated to either Independent or to National.

This is the second year in which the data collection process from museum service providers who operate multi-site and/or co-located museum sites have provided data through a bespoke template. This approach was designed to provide more flexibility for organisations to report a mix of service-wide and site specific data.

The core premise of the survey is determined by individual Accredited museums sites, therefore it was important to develop a consistent approach to data provided from multi-site and co-located organisations.

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. This approach has enabled an increased consistency of analysis 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.

Four multi-site organisations provided survey returns via the template, representing 10 museums, 17% of the return rate. Two multi-site organisations provided information for two sites and two multi-site organisations provided information for three sites.

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 124 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

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Profile of respondents

48% (60) of the 124 non National Accredited museums provided data to inform this report. A list of respondent museums is included at the end of this report. 90% of the response rate, in this second year, is primarily comprised of Independent 63% (38 of 60) and Local Authority 27% (16 of 60) museums. The figures shown here present the variation between the various types* of London's Accredited museums and the respondent museums. The four museums previously categorised by the Accreditation Scheme as 'Military' have now been recorded as Independent within governance type. **Type of museum used here is defined by the UK Museum Accreditation Scheme.*

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:

- 45 reported that they were open all year round
- 8 reported that they were closed part of the year as regular seasonal closure
- 6 museums open by appointment only – all year
- 4 museums were closed for the year/part of the year for redevelopment, refurbishment and/or repair
- 3 museums did not provide a response

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

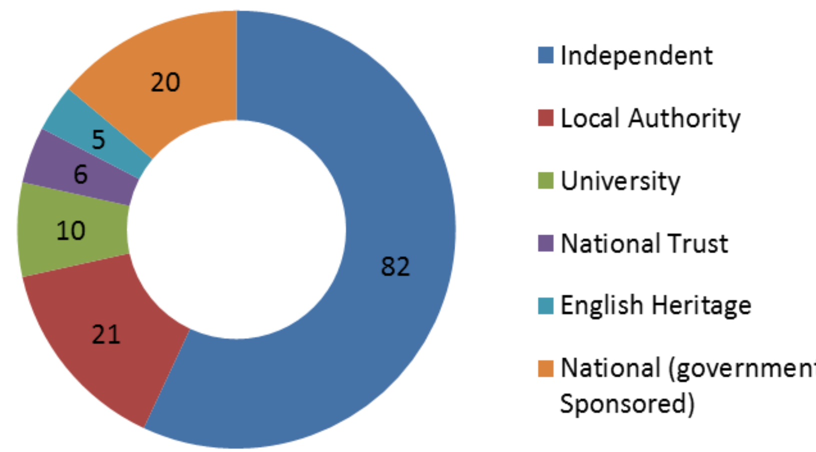
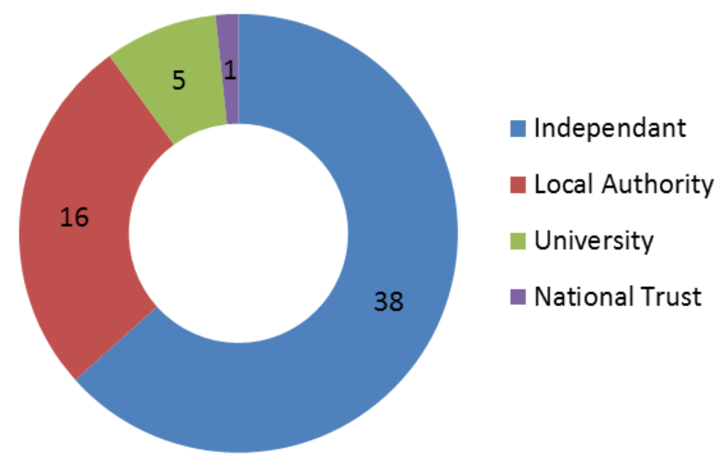


Figure 2: All respondent museums by museum type



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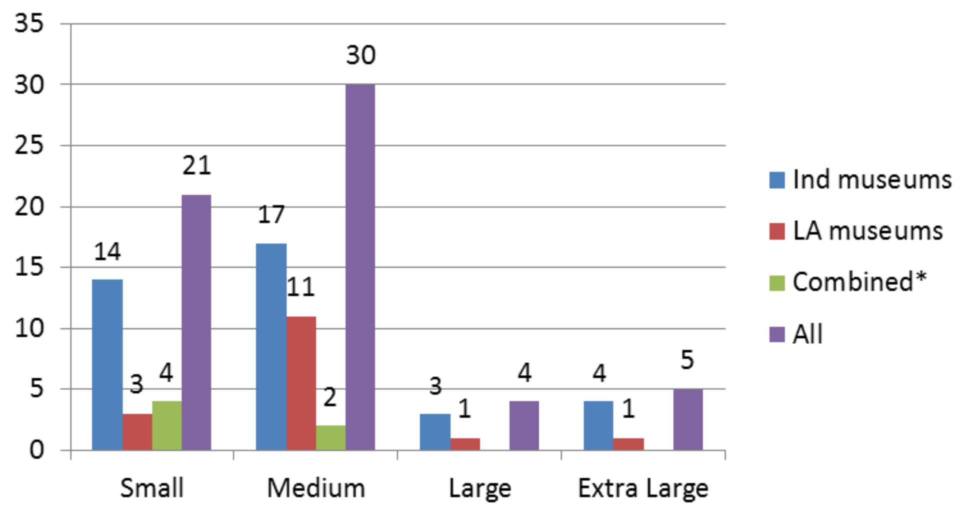
Respondents by size

50% (30) of all the respondent museums fall within the Medium category and 35% fall within the Small category. Local Authority (LA) museums respondents provided the most representative sample (76%) of a single museum type in the survey.
** The University and National Trust museum respondents are grouped into 'Combined' 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

Figure 3: Respondents by museum size and by governance type



Geographic distribution

Overall, compared to the previous year in which the survey operated, all bar one sub-region has seen an increase in participation. Responses from Central London have increased 16% and in West London by 25% in the current survey period.

Figure 4: Respondents by sub-region

Sub-region	No. of respondents/no. of Accredited museums	Percentage return rate
Central London	**28 of 66**	**42%**
All Outer London	**32 of 58**	**55%**
East (Outer) London	10 of 17	59%
North (Outer) London	5 of 7	71%
South (Outer) London	10 of 22	45%
West (Outer) London	7 of 12	58%

Audiences

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

Total visit figures

A total of 4,198,435 visits were made to museums in 2018-19 based on responses received by 48% of non-Nationals in London. 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 72% of all reported visits. 78% (47) of museums provided known audience figures with the remaining providing estimated figures.

Figure 5 presents total visit figures for the 60 museums providing data. The following information looks at the average number of visitors by size of museum.

- 21 Small museums received an average of 4307 visitors
- 30 Medium museums received an average of 28,027 visitors
- 4 Large museums received an average of 52,513 visitors
- 5 Extra Large museums received an average of 611,427 visitors

Figure 6 presents total visit figures of the 60 museums providing data. The following information looks at the average number of visitors by governance type.

- 38 Independent museums received an average of 95,480 visitors
- 16 Local Authority museums received an average of 31,424 visitors

Due to the changes in the governance type recorded by Accreditation one Extra Large museum is now categorised as Independent.

**Combined in Figure 6 represents visit figures provided by both National Trust and University museums.*

Figure 5: Visit figures by museum size

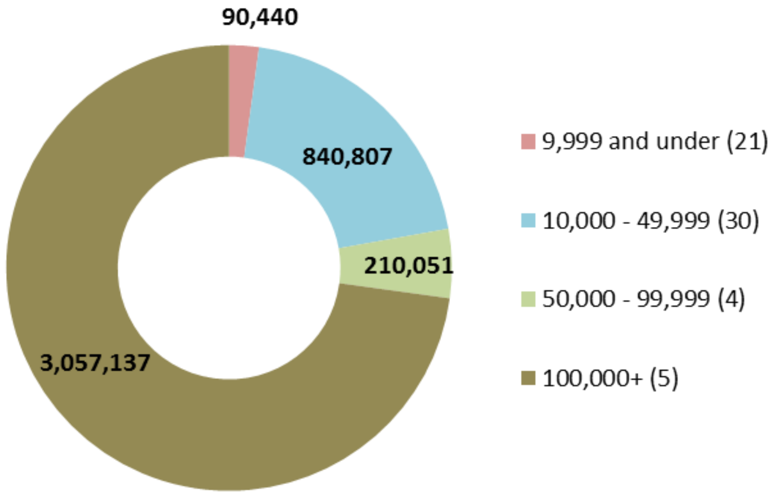
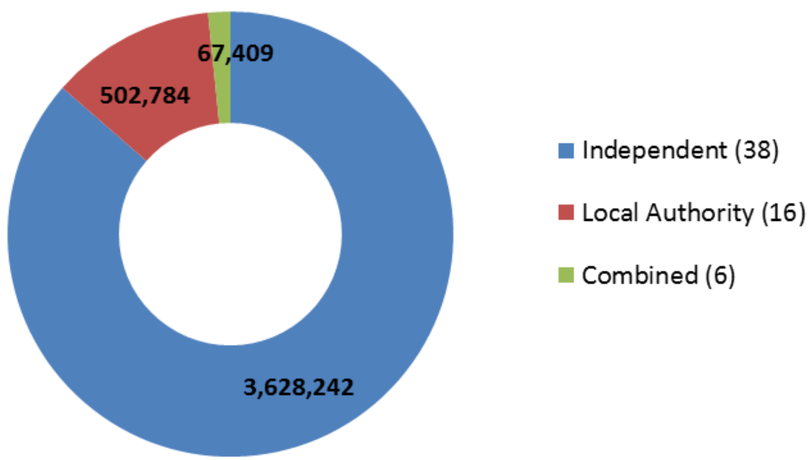


Figure 6: Visit figures by museum type



Visit figures by sub-region

Figure 7 details the breakdown of visits per sub-region. East (Outer) museums reported the highest number of visitors as three of the five respondent museums with 100,000+ visits per annum are located in this sub-region. The three museums are the Horniman, Royal Fusiliers Museum (located within the Tower of London) and the Museum of London Docklands.

Visits by children

65% (39) of respondent museums provided a breakdown of adult and child (under 16) visits. 20% (12) of respondents reported actual figures for both adult and child visits. Based on the 65% of respondents reporting a breakdown, children accounted for 18% of visits.

These museums reported a breakdown of 1,904,051 adult visits and 418,597 child visits. However, data provided by 12 museums whom reported 'known' figures for both adult and child visits shows a slightly lower ratio of 16% child visits.

- 26 Independent museums reporting a break down of adult and child visits reported 17% child visits. This reduces to 16% for those museums (n.6) reporting known, rather than estimated data, for both adult and child visits.
- 8 Local Authority museums reported a breakdown of adult and child visits reported 29% child visits. This average reduced to 22% for the two museums reporting known, rather than estimated, data for both adult and child visits.

There was insufficient data provided from other museum types to establish the ratio of child to adult visits.

Figure 7: Visit figures by sub-region

Sub-region	Total visit figures	Percentage of all visits	Number and size (XL:L:M:S)
Central London	**1,427,368**	**34%**	**n.28 (2:3:15:8)**
All Outer London	**2,771,067**	**66%**	**n.32 (3:1:15:13)**
East (Outer)	2,366,769	56%	n.10 (3:0:4:3)
North (Outer)	125,708	3%	n.5 (0:0:3:2)
South (Outer)	114,434	3%	n.10 (0:0:4:6)
West (Outer)	164,156	4%	n.7 (0:1:4:2)

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	10,266	733	n.14	18%
10,000 – 49,999	106,134	5,586	n.19	22%
50,000 – 99,999	16,215	5,405	n.3	10%
100,000+	285,982	95,327	n.3	17%
All museums	418,597	NA	n.39	18%

Economic impact of visits

Museums make an important contribution to the economy. In 2018, all of the top 20 most visited free attractions and 12 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 2018.*

In order to estimate the economic impact of visits to museums, the Association of Independent Museum's (AIM) visitor spend calculators have been applied here. Unlike the English regions, the spend assumptions for London are not distinguishable per sub-region but 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 enable 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	£8,381,525	£31,145,098	£39,526,623
All Outer London	£15,458,448	£62,198,519	£77,656,967
Independent	£20,100,875	£82,138,942	£102,239,818
Local Authority	£3,254,496	£10,004,668	£13,259,164
Nat Trust /University	£484,602	£1,200,006	£1,684,608

Using this toolkit the gross visitor impact was £117,183,590 on the London Economy based on the visit data provided by museums:

- There was a reported £23,839,973 in 'local' visitor spend in 2018-19
- There was a reported £93,343,617 in 'day' visitor spend in 2018-19

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 3,456,460 based on the adult/child ratio of 82:18 for museums with 9,999 visits and under; 78:22 for museums with 10,000 – 49,999 visits; 90:10 for 50,000 – 99,999 visits; and 83:17 for museums with 100,000+ visits per annum.

Online engagement

The survey gathers information about museums online and social media presence.

Websites

78% (47) of respondent museums report having a website for which they have editorial control. Of the remaining 13 museums which reported that they did not have editorial control of their website, the majority are local authority organisations or independents operating multisite museums. 55% (33) of respondents reported a total of 4,389,869 unique visits to their websites. Over three quarters of the museums reporting unique visits reported known, rather than estimated data.

Across the 55% (33) respondent museums the average number of unique visits reported was 133,026 and the median number of unique visits to websites in 2018-19 was 62,033.

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 they had across their social media platforms.

93% (56) of museums stated that they used social media to engage with audiences with platforms including Facebook, Twitter and Instagram most frequently cited. 82% (49) of museums reported an estimated 1.9 million subscribers or followers. The previous upward trend in reporting known, compared to estimated, data for digital engagement can also be seen in the reporting of social media subscribers or followers; 80% of museums are reporting known, rather than estimated, data for their social media engagement.

Of the four (7%) remaining respondent museums two, both in the small category, confirmed they did not use social media to engage with audiences. However, one museum was within a large national organisation which operates across a range of social media platforms.

Two museums 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 but whose host organisation operates within a national website with dedicated pages to individual sites. The other museum confirmed that they do not operate either a website or social media. The remaining two did not provide answers to either question.

LONDON MUSEUM DEVELOPMENT

Education, sessions and participants

Based on 67% (40) of respondents, museums in London engaged with 5,182 schools and learning organisations. Individual museums reported engaging with a range of different schools and learning organisations of between 1 and 2,342. The median number of different schools and learning organisations reported was 39.

- 78% (47) of museums reported a total of 9,066 on-site sessions
- 78% (47) of museums reported a total of 407,805 participants
- 45% (27) of museums reported a total of 677 off-site sessions
- 45% (27) of museums reported a total of 41,138 participants

29 Independent museums reported data for both educational on-site sessions and number of participants reported a total of 7379 on-site sessions reaching 358,213 participants.

- On average, each Independent museum delivered 254 on-site sessions attended by a total of 12,352 participants; on average, 49 participants attended each on-site session

15 Independent museums providing data on both off-site Educational sessions and participants reported a total of 525 off site sessions reaching 31,580 participants.

- On average, each Independent museum delivered 35 off-site sessions attended by a total of 2,105 participants; on average, 60 participants attended each off-site session

Fig 10 Notes: data provided for off-site sessions and participants includes two museums represented by a multisite organisation. Known figures were provided for 28 of 47 museums for sessions and 27 of 47 museums for participations on-site and 16 of 27 museums for sessions and 11 of 27 of museums for participants off-site.

Fig. 10: Educational sessions and participants

	Total and sample	Extra Large and Large	Medium and Small
No. of on-site sessions	9066	3118	5948
Average number of sessions	193	390	153
Sample number	n.47	n.8	n.39
No. of participants on-site	407,805	184,683	223,122
Average number of participants	8677	23,085	5721
Sample number	n.47	n.8	n.39
No. of off-site sessions	677	248	429
Average number of sessions	25	62	19
Sample number	n.27	n.4	n.23
No. of participants	41,138	20819	20,319
Average number of participants	1524	5205	883
Sample number	n.27	n.4	n.23

13 Local Authority museums providing data on both Educational on-site sessions and participants reported a total of 1,379 on-site sessions reaching 40,969 participants.

- On average, each LA museum delivered 106 on-site sessions attended by a total of 3,151 participants; on average, 30 participants attended each on-site session

7 Local Authority museums providing data on both Educational off-site sessions and participants reported a total of 100 off-site sessions reaching 1,122 participants.

- On average, each LA museum delivered 14 off-site sessions attended by a total of 7,852 participants; on average, 80 participants attended each off-site session

LONDON MUSEUM DEVELOPMENT

Activities and events, sessions and participants

In addition to the previous education sessions, museums in London deliver a wide range of activities and events both on and off-site.

- 70% (42) of museums reported a total of 5,707 on-site sessions
- 70% (42) of museums reported a total of 227,879 participants
- 43% (26) of museums reported a total of 385 off-site sessions
- 43% (26) of museums reported a total of 24,129 participants

26 Independent museums reported data on activities and events for both educational on-site sessions and number of participants reported a total of 4,272 on-site sessions reaching 181,417 participants.

- On average, each Independent museum delivered 164 on-site sessions attended by a total of 6,978 participants; on average, 43 participants attended each on-site session

17 Independent museums providing data on activities and events for both off-site sessions and participants reported a total of 241 off site sessions reaching 20,279 participants

- On average, each Independent museum delivered 14 off-site sessions attended by a total of 1,193 participants; on average, 85 participants attended each off-site session

Fig 11 Notes: data provided for off-site sessions and participants includes two museums represented by one multisite organisation. Known figures were provided for 29 of 42 museums for sessions and 19 of 42 museums for participations on-site and 14 of 26 museums for sessions and 9 of 26 of museums for participants off-site.

Figure 11: Activities and events, sessions and participants

	Total and Sample	Extra Large and Large	Medium and Small
No. of on-site sessions	5707	2415	3292
Average number of sessions	136	345	94
Sample number	n.42	n.7	n.35
No. of participants on-site	227879	137273	90606
Average total participants	5426	19,610	2589
Sample number	n.42	n.7	n.35
No. of off-site sessions	385	54	331
Average number of sessions	15	11	16
Sample number	n.26	n.5	n.21
No. of participants off-site	24,129	4657	19,472
Average total participants	927	931	927
Sample number	n.26	n.5	n.21

11 Local Authority museums reported data on activities and events for both educational on-site sessions and number of participants reported a total of 1,263 on-site sessions reaching 39,514 participants.

- On average, each Local Authority museum delivered 115 on-site sessions attended by a total of 3,592 participants; on average, 31 participants attended each on-site session

8 Local Authority museums providing data on activities and events for both off-site sessions and participants reported a total of 141 off site sessions reaching 3,730 participants.

- On average, each Local Authority museum delivered 18 off-site sessions attended by a total of 466 participants; on average, 26 participants attended each off-site session

Financial operations

Museums operate across a variety of financial years. Due to these variations in recording and reporting of financial operations the data presented here should be considered a guide, rather than being representative of a specific financial period. 68% (41) of respondents offered financial data for the financial year 1 April 2018 – 31 March 2019.

Income

87% (52) of respondent museums reported figures from one or more sources of income generating £56,179,659.

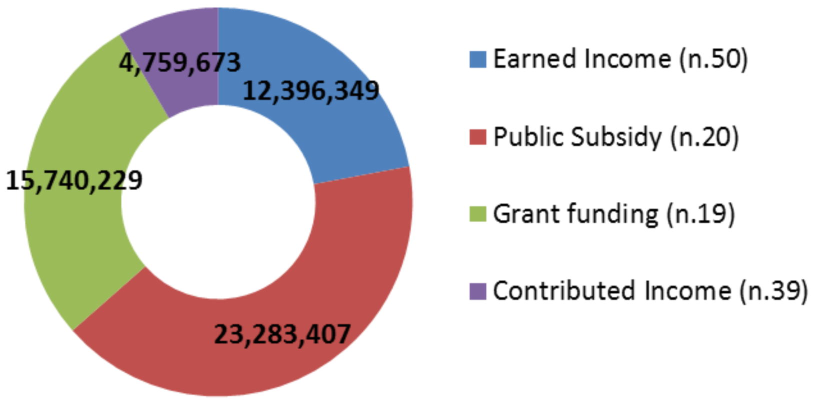
Total income generated across the types of museums is as follows:

- £4,176,724 was generated by Local Authorities (n.13)
- £50,884,916 was generated by Independent museums (n.33)
- £1,118,018 was generated by University and National Trust museums (n.6)

Average total income generated by museum type:

- £321,286 average total generated income by Local Authority museums (n.13)
- £1,541,967 average total generated income by Independent museums (n.33)
- £186,336 average total generated income by University and National Trust museums (n.6)

Figure 12: Sources of income across all respondents



87% (52) of respondent museums reported one or more sources of income from the four key income categories as shown here:

- £12,396,349 in earned income including admissions, retail, catering, events, hospitality, educational and other earned income from trading, e.g. property rental reported by 50 museums
- £23,283,407 received in regular public funding, including Arts Council National Portfolio (NPO) funding reported by 20 museums
- £15,740,229 received in grant funding reported by 19 museums
- £4,759,673 received in contributed income including all money received in donations, friends members/schemes, sponsorship income, corporate membership, or other non-earned income reported by 39 museums

A further four museums confirmed they received a regular public subsidy but were unable to provide a value. One museum confirmed receipt of grant funding but not the grant(s) value.

LONDON MUSEUM DEVELOPMENT

Total income by charging model and museum type

Museums who charged admission reported a total income of £7,135,973 (n.18) whilst museums whose admission is free reported a total income of £18,291,452. The average income reported for charging museums was £396,443, and for free admission museums was £630,740.

Breakdown of income

Total generated income by museum size breaks down as follows:

- £1,431,601 generated by museums with 9,999 or less visits per annum with an average of £84,212 (n.17)
- £12,031,948 generated by museums with 10,000 – 49,999 visits per annum with an average of £445,628 (n.27)
- £2,116,315 generated by museums with 50,000 – 99,999 visits per annum with an average of £529,079 (n.4)
- £40,599,795 generated by museums with 100,000+ visits per annum with an average of £10,149,949 (n.4)

The following analysis of sources of income by museum type considers only those museums in the group of 52 museums providing income data and the source of income. This approach, due to additional survey logic used this year, is intended to provide more clarity in the distribution of income across the sector. 44 (73%) of museums provided sufficient information across the categories and generated a total income of £55,720,666 across the group.

For Local Authority (LA) and Independent (Ind) respondent museums there was sufficient data to identify averages across the four categories of income:
Earned income: LA (n.8) average £126,260, Ind (n.30) average £365,338
Public funding: LA (n.6) average £414,442 Ind (n.8) average £2,475,800
Grant income: LA (n.4) average £88,621, Ind (n.10) average £1,527,494
Contributed income: LA (n.5) £12,837, Ind (n.26) average £178,684

Figure 13: Breakdown of income sources by museum type

Admission charges

Museums were asked whether they charged for admission:

- 92% (55) of museums responded to this question
- 30% (18) reported that they charged for admission
- 53% (32) offered free entry all year round
- 8% (5) said that they charged seasonally/for some exhibitions

32% (19) of museums provided information on adult admission charges, and 30% (18) also provided information on admission charges for children. The admission charge for an adult ticket ranged between £0.50 and £12.50, with an average of £7.84; the admission charge for a child ticket ranged between £0.20 and £7.50, with an average of £4.17. One museum charging adult admission prices provided free entry for children.

Retail income

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

77% (46) of respondent museums in London have a shop or a retail space. Based on the data from 65% (39) of museums who reported retail revenue the total retail income for 2018-19 was £2,314,296.

The average retail spend per head is an important indicator used to assess the effectiveness of a museum's retail offer. 65% (39) of museums provided the required data for this to be measured. Across these museums the average spend per head was £1.19. Figure 14 presents information provided on retail spend per head by museum size and charging model. For each charging model a single museum presenting significantly higher levels of spend per head. If these two responses were omitted the average spend per head across the group for charging museums would be £1.619 and for free entry would be 0.482p.

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

	Average	Lowest	Highest	Sample
9,999 and under	0.906p	0.179p	£1.824	n.9
10,000 – 49,999	£1.301	0.021p	£8.657	n.22
50,000 – 99,999	£1.754	0.077p	£3.479	n.4
100,000+	0.667p	0.351p	£1.431	n.4
Free admission	0.662p	0.021p	£4.444	n.22
Charged admission	£2.122	0.179p	£8.657	n.14

LONDON MUSEUM DEVELOPMENT

Donations

Museums were asked to provide information on their income from donations and other monies received from the general visiting public. 97% (58) of respondent museums provided information on income with 19 (32%) confirming a nil income from both donations and other sources of contributed income. Of these, 10 (17%) provided information on their other sources of financial income across the other categories.

Across the sample group the income from donations and other monies received from the general visiting public has remained constant for those museums in the Small and Extra Large category. However it has doubled from 10p to almost 23p per head for museums in the Medium category. When looking at the average income by charging model, this year it has been possible to look at each of the three categories separately due to the increased response rate. Following on from the previous year, there is a consistently higher level of income per head from both those museums that charge and independent museums reflected in comparison to free admission, or Local Authority museums.

Catering income

13 museums generated over £1,011,700 of catering income. A further six museums delivering catering provision were unable to provide income figures. Whilst there was a mix of size of museums reporting in house catering, over 50% are in the Medium category. Museums which contract out cafe or refreshment facilities are all Independent, three Extra Large and one in the Large category.

- 20% (12) had an in-house café/refreshment facilities generating £409,145
- 7% (4) contracted out their café/refreshments generating £602,555

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

	Average	Lowest	Highest	Sample
9,999 and under	0.370p	0.015p	0.952p	10 of 21*
10,000 – 49,999	0.229p	0.015p	0.789p	18 of 30*
50,000-99,999	0.109p	0.061p	0.204p	3 of 4
100,000+	0.216p	0.021p	0.297p	4 of 4
Free admission	0.214p	0.015p	0.952p	23 of 31*
Charged admission	0.375p	0.046p	0.877p	10 of 18
Charge for some exhibitions / seasonally	0.190p	0.210p	0.297p	3 of 4
Independent	0.329p	0.151p	0.952p	25 of 37
Local Authority	0.058p	0.021p	0.148	7 of 16

**Within Figure 15 above data provided by four museums (of the 51 providing data) has been omitted due to the significantly higher levels of income from donations and other monies received from visiting public. Data from these museums is retained in the narrative analysis shown on this page.*

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 £42,333,056 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 65% (39) 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.

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

	Value	No. of responses
Central London	24,611,067	22
All Outer London	17,721,989	17
Independent (Small/Medium)	4,399,481	19
Independent (Large/Extra Large)	35,043,067	6
Local Authority (Medium)	2,296,193	8
Local Authority (Large/Extra Large)	446,638	2

Capital investment

20% (12) of museums specified that they had received capital investment in 2018-19, totalling £5,315,553. 84% of capital investment was generated by Independent museums (n.7) however investment was received by two museums which recorded 1m. and 2m. Local Authority Museums (n.3) generated 16%, with one museum recording 80% of the total value of capital investment reported by Local Authority museums. 43 (72%) of respondent museums confirmed that they had not been in receipt of capital grant investment during 2018-19.

LONDON MUSEUM DEVELOPMENT

Expenditure and staff costs

62% (37) of respondent museums employ staff and provided figures for both total expenditure and expenditure on staff costs. Four museums' information was provided from multisite organisations.

On average, spending on staff accounted for 44% of total expenditure, a total of £26,442,662, which breaks down as follows:

- 17% (8) of museums spent an average of between 20% - 49% of their total expenditure on staff costs
- 15% (9) of museums spent an average of between 52% - 74% of expenditure on staff costs
- 22% (13) of museums spent an average of between 80% - 94% of expenditure on staff costs
- 3% (2) of museums spent an average over 95% of expenditure on staff costs
- Expenditure on staffing for Independent museums ranged from 20 – 100%
- Expenditure on staffing for LA museums ranged from 28 – 89%
- Expenditure on staffing for University museums ranged from 80-95%

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

	Average total expenditure	Average expenditure on staff	No. of responses by size and type
9,999 and under*	116,814	95,714 (82%)	n.7
10,000 – 49,999	538,339	313,569 (58%)	n.22
50,000-99,999	513,242	257,284 (50%)	n.4
100,000+	11,481,500	4,461,250 (39%)	n.4
Independent	2,383,459	994,038	n.23
Local Authority	482,276	269,526	n.10
University	249,448	221,131	n.4
Total responses	1,638,922	714,667	n.37

**The only museum within the small category reporting actual data for both expenditure and expenditure on staffing reported a spend of 48% of expenditure on staff costs. One of the seven museums in this category provided data as part of a multisite. One of the 22 museums in the medium category also provided data as part of a multisite. Four of the 23 museums provided data as part of a multisite. Within the group expenditure ranged from 20-100% and LA ranged from 28-89%.*

LONDON MUSEUM DEVELOPMENT

Workforce

Paid staff

82% (49) of museums confirmed whether they employed staff. 82% (49) confirmed that they had paid staff and 8% (5) did not have paid staff. This includes eight museums providing data as part of multisite organisation.

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 2018-19. 78% (47) of museums provided data on both these questions.

- Museums employed a total of 879 paid staff
- Museums employed 680.59 FTEs

There are considerable variations in the numbers of staff across the sector which can be further understood by looking at multisite and single site responses separately:

- 3 organisations representing 7 Accredited museum sites employ 311.88 FTE (369 posts); 46% of the total number of all reported FTE
- 38 sites employ 368.71 (510 posts); 54% of the total reported FTE

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

- Independent museums (n.26) employed an average of 27 staff (22.14FTE)
- Independent museums (n.26) reported a total of 707 paid staff and 576 FTE
- Local Authority museums (n.15) employed an average of 8 staff (5.53 FTE)*
- Local Authority museums (n.15) reported a total of 122 paid staff and 83 FTE*
- University museums (n.5) employed an average of 10 staff (4.2 FTE)
- University museums (n.5) reported a total of 48 paid staff and 21 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 837 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.

Whilst a high level of paid staff was reported by 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 127.33 FTE
- Independent Large sized museums (n.3) employed an average of 7 FTE
- Independent Medium sized museums (n.14) employed an average of 11.39 FTE*
- Independent small-sized museums (n.6) employed an average of 2.2 FTE

* One Medium museum reported notably higher FTE, and excluding this museum would have resulted in an average FTE of 9.15: * One LA museums provided data for FTE and head count which could not be used within the analysis.

LONDON MUSEUM DEVELOPMENT

Volunteers

Museums are asked to provide information on both the number of volunteers and the hours contributed. This includes both volunteers engaged in the delivery of the museum provision as well as volunteers engaged in governance, such as trustees. 87% (52) of museums confirmed they had volunteers. The 52 museums include five museums providing data as part of a multisite organisation. Two University museums confirmed that they did not have volunteers during 2018-19. Based on this information we can estimate that volunteer hours contribute at least £1,880,393 to the economy.

- Museums reported a total of 2,801 volunteers, based on the responses of 87% (52) of museums. Over half of these museums reported known data for number of volunteers
- The total number of volunteer hours recorded by the above museums was 282,059. A third of these museums reported known data for volunteer hours

Considering the 25% (15) museums who were able to provide known data on both the number of volunteers and the volunteer hours we can understand with increased accuracy the level of volunteer hours provided by volunteers. This group of fifteen museums reflects all size categories and the governance types of Independent, Local Authority and National Trust. These museums reported:

- A total of 658, and an average of 44, volunteers per museum
- A total of 66,544, and an average of 4436, volunteer hours per museum
- A total of £443,627, and an average of £29,575, of economic impact from volunteering
- A total of 40, and an average of 2.7, Full Time Equivalent posts

Based on the information provided by these museums we can estimate that each volunteer contributes 101 hours per year.

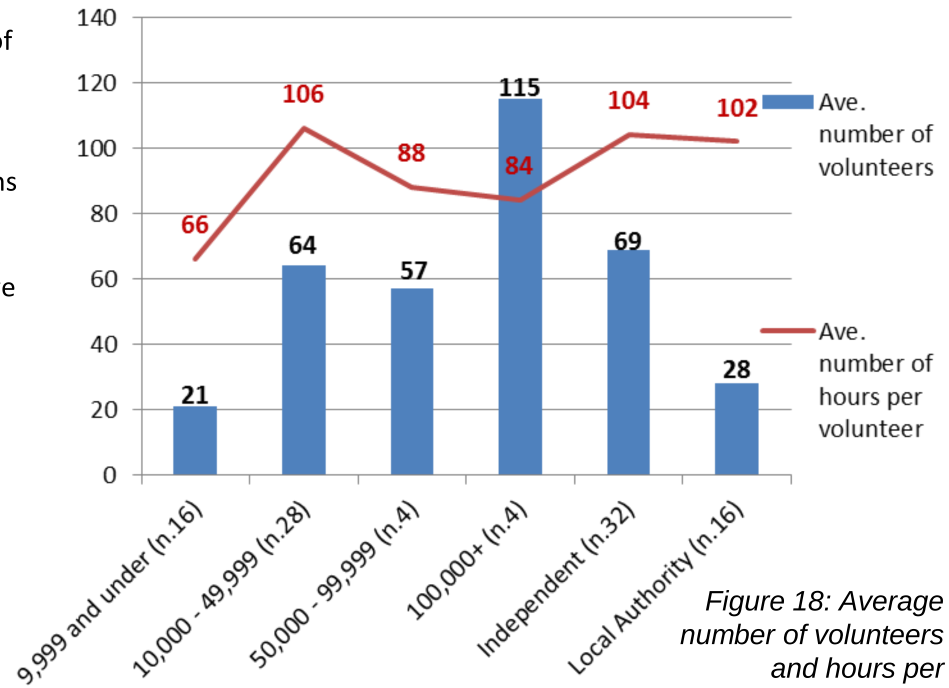


Figure 18: Average number of volunteers and hours per volunteer by museum size and type

Equality, Diversity and Inclusion

Museums were also asked an additional question around their workforce - both paid and voluntary - focusing on equality, diversity and inclusion. 88% (53) of museums provided an answer to whether or not they had an Equality and Diversity Action Plan:

- 47% (28) reported that their museum organisation did have an equality and diversity action plan
- 35% (21) reported that their museum organisation did not have an equality and diversity action plan
- 7% (4) of respondents reported that they did not know

LONDON MUSEUM DEVELOPMENT

Comparison data

Sample and response

Responses to London's Annual Survey of Museums across the current and previous year for non-National Accredited and Working Towards Accreditation museums are as follows:

- 38% (48 of 126) response rate of museums in 2017-18
- 48% (60 of 124) response rate of museums in 2018-19

There was a 10% increase in the current year's participation across the region. Due to the variation in the number and size of museums contributing data care should be taken in comparing total values provided between years.

Visit numbers

- Total visits 3,876,653 in 2017-18 based on responses received from 38% (48) non-National museums in the Accreditation scheme in 2017-18
- Total visits 4,198,435 2018-18 based on response received from 48% (60) non-National Accredited museums in the Accreditation Scheme in 2018-19

It is important to highlight that Extra Large museums make a notable impact on the results of the survey and represent 78% of all visits in 2017-18 and 72% of all visits in 2018-19. Figure 19 presents the average audience figures by size category and governance type between years and highlights the variation in visitor numbers reported by respondent museums.

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. This is in line with the findings of Visit England 2018 survey which reports a visitor increase of +2% across England between 2017 and 2018.

Figure 19: Average number of visitors per museum by size and type

	Average Audience 2017-18	Average Audience 2018-19	Percentage variation	Sample Size 2017-18	Sample Size 2018-19
9,999 and under	3,082	4,307	+40%	n.15	n.21
10,000 – 49,999	25,826	28,027	+9%	n.24	n.30
50,000-99,999	60,490	52,513	-13%	n.3	n.4
100,000+	605,824	611,427	+1%	n.5	n.5
Independent	90,298	71,034	-21%	n.26	n.38*
Local Authority	29,211	31,424	+8%	n.18	n.16

** One Extra Large Museum newly categorised as Independent in 2018-19 has been omitted from analysis by Type in Figure 19.*

Education sessions and participants on-site

34 museums in 2017-18 and 47 museums in 2018-19 provided information on the number of education sessions and participants on-site. Whilst care should be taken in considering the data between years due to the variation in respondent museums, it is clear that the overall level of engagement through delivering Educational sessions on-site has increased.

The average number of on-site education sessions and average total number of participants reported in each year:

- 159 on-site sessions and 4,870 on-site participants in 2017-18
- 193 on-site sessions and 8,677 on-site participants in 2018-19

Online engagement

An increase in the average number of unique visits to websites of 27% was reported across respondent museums in 2018-19. An increase of 15% was reported by the group of eight museums providing data in both years.

Comparison Data: Volunteering

The Visit England 2018 Visitor Attraction report highlights the increasing reliance on the volunteer workforce due to the increased number (20%) of visitor attractions reporting a higher number of volunteers. Whilst the contribution of volunteers is long recognised by the museum and heritage sector, identifying robust data that can express the scale of this contribution remains a challenge due to the limited use of reporting systems. Results between years are presented here as the average number of volunteers and volunteer hours by size and type of museum. An increase in the number of volunteer hours contributed by volunteers between the two years can be identified across all size and types of museum.

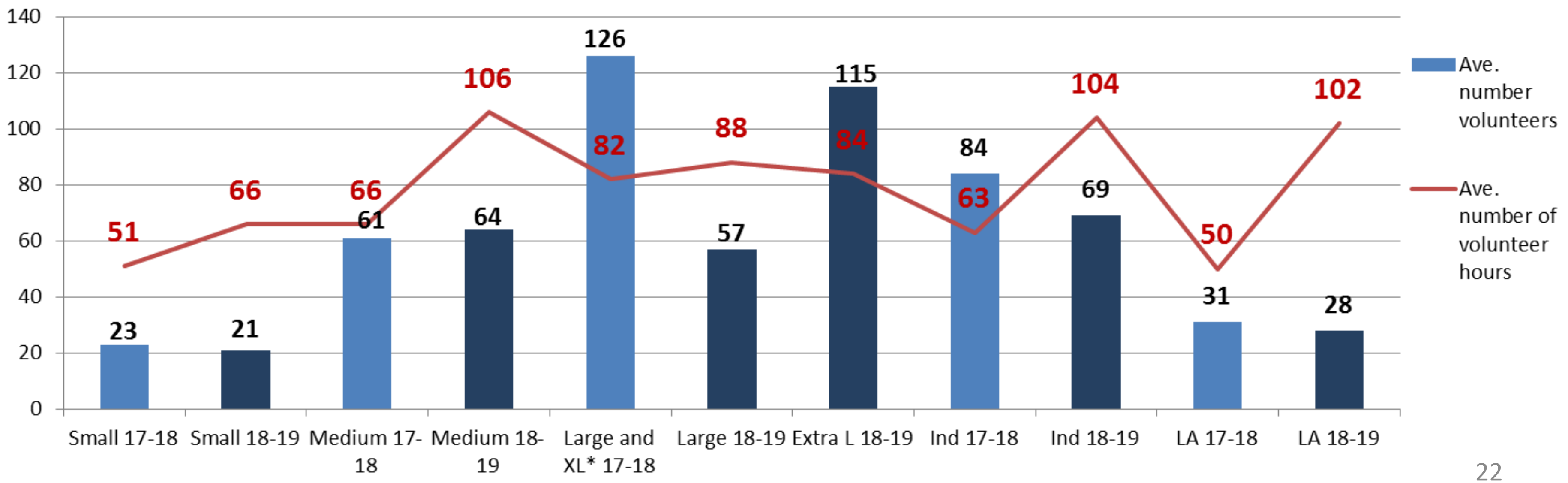
Comparisons between years: Paid Staff

In the previous survey 35 museums provided data on paid staff, which has increased to 48 (80%) of respondent museums in 2018-19.

- Independent museums responding to the survey employed an average of 27 staff (22.14FTE) in 18-19 and an average of 33 staff (25 FTE) in the previous year; a reduction of 12% for FTE paid staff.
- Local Authority museums responding to the survey employed an average of 8 staff (5.53 FTE) in 2018-19 and an average of 9 staff (5.5FTE) in the previous year; there is minimal variation in FTE but approximately a 10% reduction in the head count across respondent museums.

Figure 20: Trends for the average number of volunteers and volunteer hours contributed

** During 17-18 reporting for size categories Large and Extra Large were combined as there was insufficient data to present them separately.*



London support

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

‘The team always respond quickly to enquiries, which makes me feel they are always there and encourages me to reach out to them. The training is top notch, and being free means I go on training more than I would if it was paid.’

Anaesthesia Museum

‘We have had great support from the museum development programme in 2018/19. We have undertaken two projects with funding from the team which have significantly helped us develop the service, particularly in diversity and audience evaluation.’

Brent Museum

‘ Very supportive, professional and understanding. Able to progress further now and will ensure that MDO is included in future discussions.’

Bruce Castle Museum

‘fantastic support for social media and accreditation, plus advise on digital works. Was a really useful experience and we plan with our fairly new team to continue to make use of the support available as we enter a phase of redevelopment’

Burgh House and Hampstead Museum

‘The weekly e-newsletters are invaluable and lead to regular action. Training attended has also been relevant and immediately put into effect.’

Charles Dickens Museum

‘An indispensable resource of expertise’

Dr Johnson’s House

‘1.Training and advice in our 'working towards accreditation' our action plan is continue working towards this by implementing that advice and by working with the Museum mentor that our MDO is arranging for us. 2. advice on fundraising […]. 3. advice on running cafe operations we will be engaging in peer learning with a number of museums who run cafes of a similar size with a view to including this income stream in our new business plan. 4. help in promoting the campaign to Save the Cinema Museum our work with the MDO's will continue with the aim of growing our petition [..].’

Cinema Museum

‘The team attended a number of training sessions which were very useful, including collection care sessions.’

Greenwich Heritage Centre

‘We received advice about our full accreditation return due this year, and we've attended many training sessions. We'll be completing the return this November, and finishing our HLF Heritage Grant activity plan projects until April 2020’

Gunnersbury Park Museum

‘I have personally attended a number of training courses at MDO which have been great for learning skills and networking with other museums. We have also benefitted from visits from MDO officers and partners who have provided free and very useful advice to help us work through issues we have. We plan to work on our accreditation status, potentially work on a new museum and try to improve our collections.’

Hillingdon Local Studies, Archives and Museum

LONDON MUSEUM DEVELOPMENT

With thanks to the following museums for participating

Central
Anaesthesia Museum
Barts Pathology Museum
Battersea Arts Centre Moving Museum
British Optical Association Museum
Burgh House and Hampstead Museum
Carlyle's House
Charles Dickens Museum
Cinema Museum
Dr Johnson's House
Freud Museum
Guildhall Art Gallery and London's Roman Amphitheatre
Household Cavalry Museum
Islington Museum
Jewish Museum, London
London Canal Museum
London Fire Brigade Museum
Massey Shaw
Museum of the Order of St John
Old Operating Theatre and Herb Garret
The Charterhouse
The Foundling Museum
The Royal Hospital Chelsea Museum
British Architectural Library – Drawings and Archives Collections (RIBA)
British Architectural Library (Library and Photographs Collection) (RIBA)
Museum of London (MoL)
Grant Museum of Zoology and Comparative Anatomy (UCL)
Petrie Museum of Egyptian Archaeology (UCL)
UCL Art Museum (UCL)

East (Outer)
Fan Museum
Greenwich Heritage Centre
Hackney Museum
Hall Place and Gardens
Havering Museum
Horniman Museum and Gardens
Museum of London Docklands (MoL)
Redbridge Museum
The Fusilier Museum London
Valence House Museum

North (Outer)
Barnet Museum
Bruce Castle Museum
Enfield Museum Service
Museum of Domestic Design and Architecture
The View (Epping Forest Collection)

West (Outer)
Brent Museum
Fulham Palace
Gunnersbury Park Museum
Headstone Manor & Museum
Hillingdon Local Studies, Archives and Museum
Musical Museum
The London Museum of Water and Steam

South (Outer)
Dorich House Museum
Honeywood Museum (LBS)
Kingston Museum
Little Holland House (LBS)
Museum of Richmond
Museum of Wimbledon
Orleans House Gallery
Wandle Industrial Museum
Whitehall Historic House (LBS)
World Rugby Museum

*Multi-site organisations
LBBD – London Borough of Barking and Dagenham
LBS – London Borough of Sutton
LBWF – London Borough of Waltham Forest
RiBA – Royal Institute of British Architects
MoL – Museum of London
UCL – University College London

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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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