South East Museum Development Programme

Photo credit: Red House Museum & Gardens

Annual Survey of Museums 2017-18

South East Museum DEVELOPMENT PROGRAMME

Supported using public funding by ARTS COUNCIL ENGLAND

Summary of findings

Response rate

- 129 Accredited museums responded to the survey. There was a 51% response rate amongst museums within the Accreditation scheme.

Audiences

- There was a total of 5,911,082 visits to museums based on responses received.
- Museums held a total of 6156 activities and events that engaged 236,037 participants.

Economic impact

- Known visits to museums had a gross visitor impact of £69.9 million in the South East economy.
- At least £15.8 million of direct, indirect and induced impacts as a result of spending on goods and services by museums.
- At least 2175 Full Time Equivalent (FTE) direct, indirect and induced jobs were supported by museums.

Online engagement

- 90% of respondent museums have their own website. Over a third of these museums are within multisite museum organisations.
- 76% use social media to engage audiences online.

Educational engagement

- Museums delivered 13,623 formal learning and outreach sessions engaging 498,579 participants in these activities. This includes both on-site and off-site activities.

Financial operations

- £39,296,583 was generated by museums in earned income (including admissions, retail, catering, events, hospitality, educational and other earned income from trading, e.g. property rental).
- £14,633,332 received in regular public funding (including ACE MPM/National Portfolio funding).
- £8,928,988 received in grant funding.
- £9,724,202 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

- There were 6462 active volunteers.
- Volunteers contributed a total of 618.322 hours to museums, equivalent to 375 Full Time Equivalent posts.
- Volunteer time was worth £4.1 million to museums.

Workforce – paid staff

- Museums employed 1808 paid staff or 1003 FTE based on 88 responses.
- 15% of museums were entirely volunteer-run with no paid staff.

Introduction

This report presents the findings of the third Annual Survey of Museums. The survey was created in the South West in 2012 to establish a baseline of data and, in 2017-18, is being used to analyse and report on trends over a period of time in eight of England's nine regions.

Findings from the data can contribute to estimates of the social and economic impacts of museums and also help inform how South East Museum Development, and other participant Museum Development Providers across England, deliver support to its museums. In future, the results will also enable museums to benchmark themselves against a range of comparators.

The survey has been developed and delivered by South West Museum Development with the intention of providing consistent data capture across multiple regions to enable more effective advocacy and benchmarking.

The 2017/18 survey received a 51% response rate and followed the same format as surveys developed since 2012/13. The survey operated in the South East in both 2012/13 and 2013/14. In 2013/14, the most recent survey, there was a 41% response rate. Survey questions were developed in consultation with museums and local authorities and incorporated ideas from pre-existing data collection exercises from other regions. Questions have been adapted to align with Arts Council England's annual survey of Major Partner Museums and the current Annual National Portfolio Organisations survey.

Survey method

The survey was sent to all Accredited museums in the region who are fully Accredited, provisionally Accredited or formally Working Towards Accreditation, as well as being promoted via the South East Museum Development website, blog, targeted e-bulletins and local museum networks. Museums were given the option of either online completion or a paper copy of the survey.

Multi-site organisations were given the option to either provide a response as a whole organisation using a bespoke form, or by individual site; 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. 73% (94) of museums reported all data for 1st April 2017 – 31st March 2018.

The survey was divided into five sections:

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

Sample and Response

51% (129) of museums within the Accreditation scheme responded to the survey in 2017/18. There are 256* Accredited museums in the region (as of April 2018, the date of the most recent Accreditation panel) of which 12 are formally Working Towards Accreditation.

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. Eight multi-site organisations provided survey returns, representing 34% (44) of the 51% (129) return rate. One museum within a multisite is not Accredited and therefore not within the scope of this report. 43% (19) were Local Authority, 50% (22) were Independent and 7% (3) were National.

There were six additional responses from six non-Accredited museums (one from a multisite) who are, regrettably, not included within the analysis undertaken for this report. South East Museum Development would like to thank these, and all, museums for submitting their survey and for supporting the collection of sector data in the region. The data will contribute to regional and local understanding of the museum sector in the South East of England.

Data within this report is presented by the sub-regions that South East Museum Development operates across:

- Buckinghamshire, Oxfordshire & Berkshire
- Hampshire Solent
- Kent & Medway
- Surrey, East and West Sussex

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

- Not all museums responded to every question
- Percentages have been rounded to the nearest whole number
- 'Respondents' or 'Museums' is every museum who submitted a response
- 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 than April – March

Two main categories of museum are used for analysis throughout the report:

- Type of museum – determined by funding source and governance model
- Size of museum – determined by annual visit figures
- In some calculations museums who report 100,000+ visits per annum are re-categorised to be included alongside 'Large' museums (e.g. 50,000 – 99,999 visits)

Profile of respondents

51% (129) of the 255 Accredited museums responded to this year's survey. A list of respondent museums is included at the end of this report. The response rate this year is 10% higher than in in 2013/14 which had participation of 41% of museums in the region.

Figures 1 and 2 present the type of museum within the region in comparison to the type of museum by respondents to this year's survey. The type of museum applied is based on the UK Museum Accreditation Scheme, Arts Council England. The returns are broadly representative across the Military, National and Independent sector. The level of return is lower in representing National Trust and University museums. The data is particularly strong in the Local Authority museum returns which represent over 68% of the sector. The level of return for Independent museums was 50%.

Figure 1: All Accredited museums by type

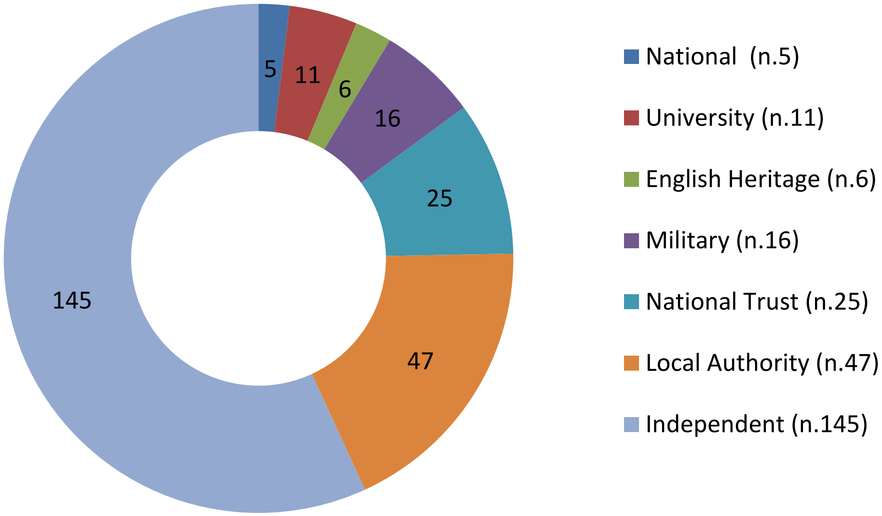
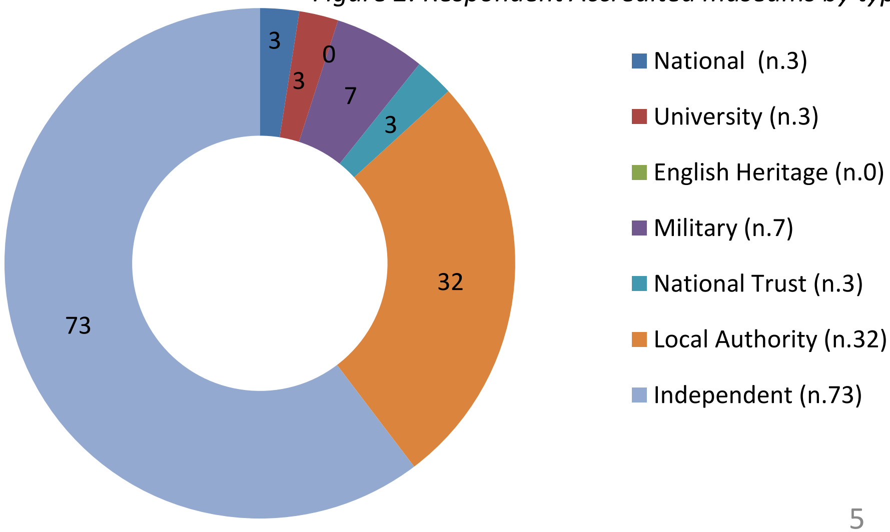


Figure 2: Respondent Accredited museums by type



Museum opening arrangements

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

- 60% (78) reported that they were open all year round
- 33% (43) reported that they were closed part of the year as regular seasonal closure
- None of the respondent museums open by appointment only
- 5% (7) of museums were closed for the year/part of the year for redevelopment, refurbishment and/or repair

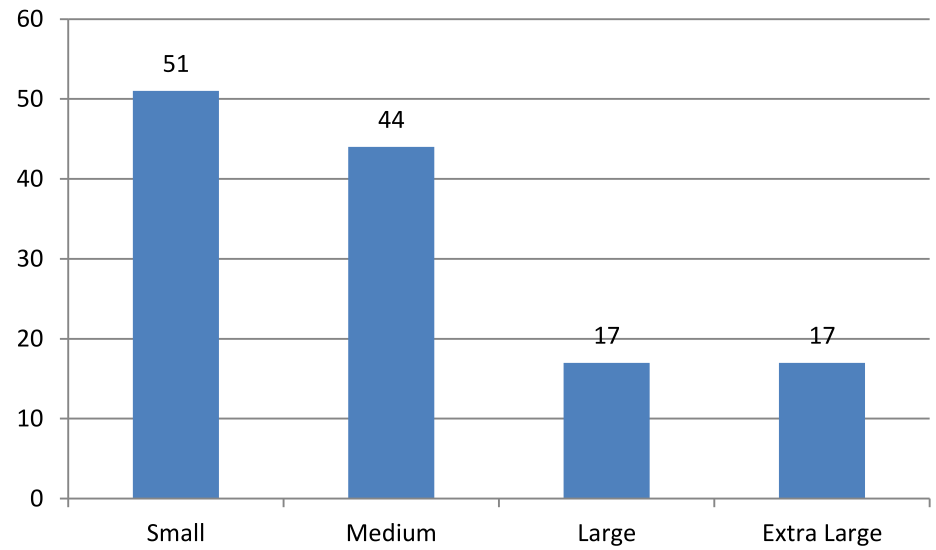
Respondents by size

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

74% of respondent museums are from the Small or Medium category.

Figure 3: Respondents by museum size



Geographic distribution

The South East region is comprised of 74 unitary, county district and borough councils across the South East. The region has the largest population in the UK, at 9.2 million which is projected to grow to 10.2 million by 2041 (SE Councils, 2018).

Figure 4 presents the response rate from each of the sub regions within the region.

Figure 4: Respondents by sub-region

Sub-region	No. of respondents/no. of Accredited museums	Percentage return rate
Buckinghamshire, Oxfordshire & Berkshire	24 of 58	41%
Hampshire Solent	52 of 75	69%
Kent & Medway	14 of 42	33%
Surrey, East & West Sussex	39 of 80	49%
Total (Accredited)	129 of 255	51%

Audiences

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

Total visit figures

A total of 5,911,082 visits were made to museums in 2017-18 based on the responses received. 58% of the total visits reported were delivered by the 17 museums within the 100,000+ museums category. The 51 museums within the 9,999 and under category account for 3% of the total reported visits.

Figure 5 presents visit figures for the 129 museums presenting data

- 51 Small museums (3%) received an average of 3,576 visitors
- 44 Medium museums (20%) received an average of 26,217 visitors
- 17 Large museums (19%) received an average of 66,969 visitors
- 17 Extra Large museums (58%) received and average of 202,160 visitors

When considering the visit figures by museum type it should be noted that Military and National museums are predominately categorised as Medium and Extra Large, respectively.

Museum opening hours

Museums reported opening hours as follows:

- 75% (97) of museums reported their opening hours
- Opening hours in 2017/18 ranged between 20 hours to 2904 hours
- Opening hours in 2017/18 for the 97 museums totalled 146,954 hours

Figure 5: Visit figures by museum size

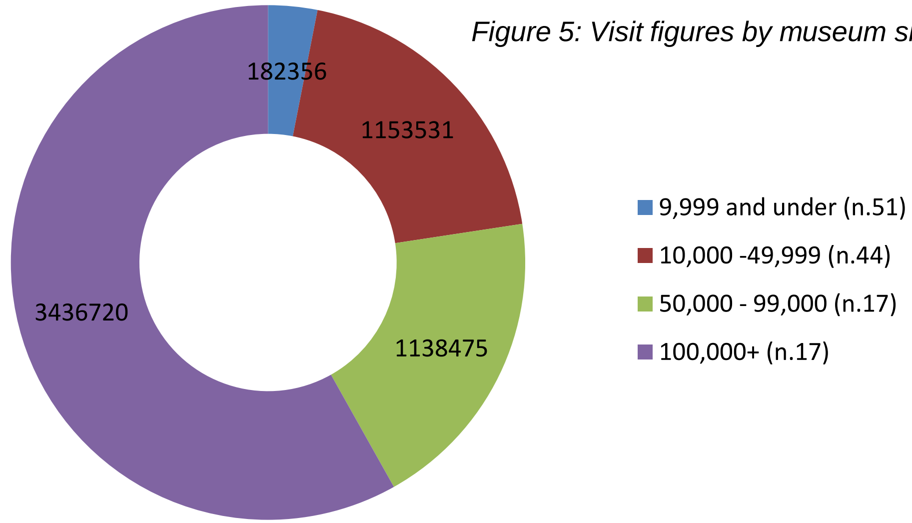
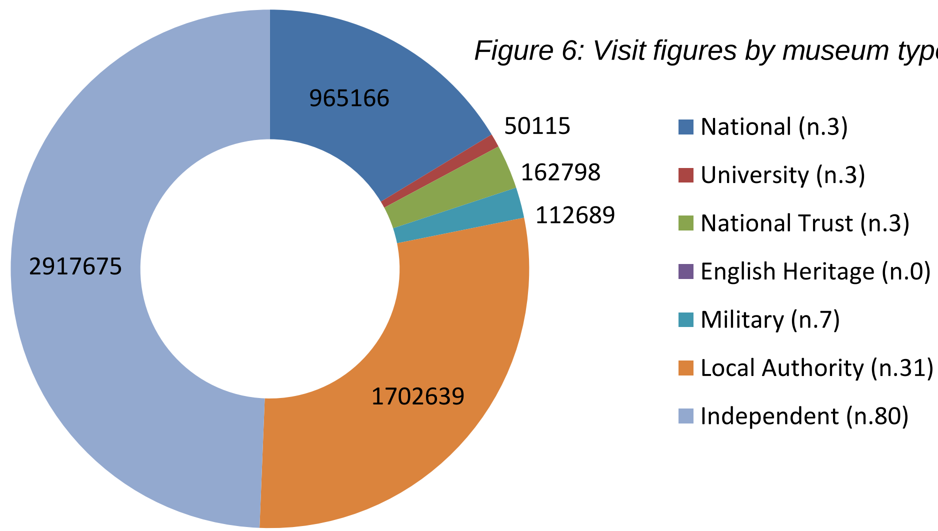


Figure 6: Visit figures by museum type



Visit figures by sub-region

Figure 7 details the breakdown of visits per sub region. The average visit figures per museum per sub region provide a further insight to the average visit figures per size of museum presented on page 7.

When considering the visit figures by sub region it should be noted that in the Kent region, one Extra Large museum represents 42% of the sub regions reported visits. Setting aside the audience data reported by this Extra Large museum, the sub region would generate average visit figures of 19,378 opposed to the current 37,029 average visit figures.

Visits by children

55% (70) of respondent museums provided a breakdown of adult and child (under 16) visits. 47% (33) of these respondents reported actual figures for both, whilst 3% (2) reported estimates. 736,979 visits by children to museums in the South East were reported in 2017-18. Based on these responses, children accounted for 12% of all visits.

Where museums reported a breakdown these represented 1,912,914 adult visits and 736,979 child visits. This would estimate child visits to represent 39% of all visits to museums. Data provided from the sample of 33 museums whom provided 'actual' rather than 'estimate' slightly shows a slight increased average of 42%.

Figure 7: Visit figures by sub-region

Sub-region	Total visit figures	Percentage of regional visit figures	Average visit figures
Buckinghamshire, Oxfordshire & Berkshire	1,329,146	22.5%	57,789
Hampshire Solent	2,736,436	46.3%	52,624
Kent & Medway	401,386	6.8%	30,876
Surrey, East & West Sussex	1,444,114	24.4%	37029
Total Region	5,911,082	100%	46,544

Figure 8: Visits by children by museum size

Museum size	Total visits by children	Sample	Average Child visits for sample group	Child visits as percentage of total visit figures by museum size
9,999 and under	24,483	33 of 70	742	13.4%
10,000-49,999	122,630	21 of 70	5840	10.6%
50,000 – 99,999	155,269	8 of 70	19,409	13.6%
100,000+	434,597	8 of 70	54,325	12.6%
Total Region	736,979	70	10,528	12.6 %

Economic impact of visits

Museums make an important contribution to the regional economy generating a wide range of benefits. The South East region is the largest tourism market in England and museums play an important role for both domestic and international tourism.

In order to estimate the economic impact of visits to museums, the Association of Independent Museum's (AIM) visitor spend calculators have been applied to each sub-region. 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. As a result, the overall economic value of visits are lower due to the higher levels of visitor spend associated with overnight visits. The application of the AIM assumed visitor spend is considered a pragmatic approach which balances the capacity of contributing museums with the robustness of calculating economic impact whilst maintaining high levels of participation across the sector. Further tools are available to museums to generate in depth assessments of economic impact and when used, provide a valuable contribution to the overall picture of the economic value of museums.

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 in order to indicate the wider economic value of museums.

Figure 10: AIM Economic Impact Toolkit assumed visitor spend

Sub-region	'Local' visitor assumed spend	'Day' visitor assumed spend	Gross Visitor impacts
Buckinghamshire, Oxfordshire & Berkshire	£7,016,505	£11,222,555	£18,239,060
Hampshire Solent	£10,879,747	£21,759,752	£32,639,499
Kent & Medway	£1,714,482	£3,428,963	£5,143,445
Surrey, East & West Sussex	£5,304,159	£8,607,283	£13,911,442
Total (Accredited)	£24,914,893	£45,018,553	£69,993,446

Using this toolkit the gross visitor impact was £69,933,446 in the South East's Economy based on the visit data provided by 51% of Accredited museums in the region:

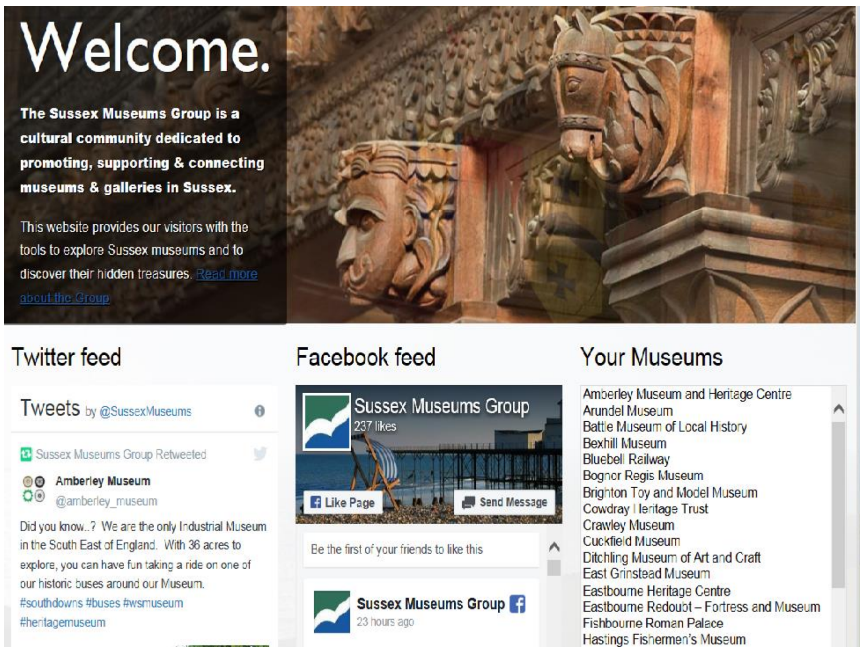
- There was a reported £24,914,893in 'local' visitor spend in 2017/18
- There was a reported £45,018,553 in 'day' visitor spend in 2017/18

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 4,226,551 based on the adult/child ratio of 81/19 for museums with 9,999 visits and under; 70/30 for museums with 10,000 – 49,999 visits; 70/30 for 50,000 – 99,999 visits; and 72/28 for museums with 100,000+ visits per annum.

Online engagement

Advances in digital technology in recent years offer museums great opportunities for potential new forms of engagement beyond the physical visit. This survey asked museums about their online and social media presence.



Websites

90% (116) of respondent museums have their own website. 42 of these museums are reporting as part of eight multisite organisations. Whilst 32% (10) 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 Henfield Museum which is a small, local authority museum in West Sussex. Information about Henfield Museum is accessible online via the Henfield Parish Council's website as well as the Sussex Museum Group website. 47% (61) of respondents reported a total of 605,412,532 unique visits to their websites in 2017-18.

Social media

112 museums responded to the question 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.

76% (98) of museums stated that they used social media to engage audiences with platforms including Facebook, Twitter and Instagram most frequently cited. Museums reported an estimated 593,844 subscribers or followers.

Education, activities and events

Museums in the region reported engagement with 2065 schools and educational organisations during 2017-18.

Figure 10 details the number of educational sessions delivered by museums, both on-site and off-site, during 2017-18 along with the number of participants. 68% (88) of respondents provided information on the number of on-site educational sessions and 60% (77) provided information on on-site activities and events. It is noted that recording of both varied between museums and not all respondents provided data on both the number of sessions and the number of participants.

67% (59) of the 88 museums reporting number of onsite Educational sessions and participants recorded Actual rather than Estimated data. In order to provide further context, on-site Educational sessions and participants to these sessions is presented below by size of museum;

- Small Museums (n.31) attracted an average of 43 participants
- Medium museums (n.29) attracted an average of 32 participants
- Large museums (n.14) attracted an average of 29 participants
- Extra Large museums (n.14) attracted an average of 38 participants

* Four museums reporting participants did not also report number of sessions. Therefore an assessment from data provided by other museums in the same size category was used to estimate an average number of sessions. The average data is shown above.

Figure 10: Educational sessions

	Total	Sample	Average per museum
No. of on-site sessions	11046	88 of 129	125.5
No. of participants to on-site sessions	374,038	88 of 88	4250
No. of off-site sessions	2577	47 of 129	55
No. of participants to off-site sessions	124,541	50 of 129	2490

Figure 11: Activities and events

	Total	Sample	Average per museum
No. of on-site sessions	5234	77	68
No. of participants to on-site sessions	192,691	73 of 77	2640
No. of off-site sessions	922	59	16
No. of participants to off-site sessions	43,346	57 of 59	760

Financial operations

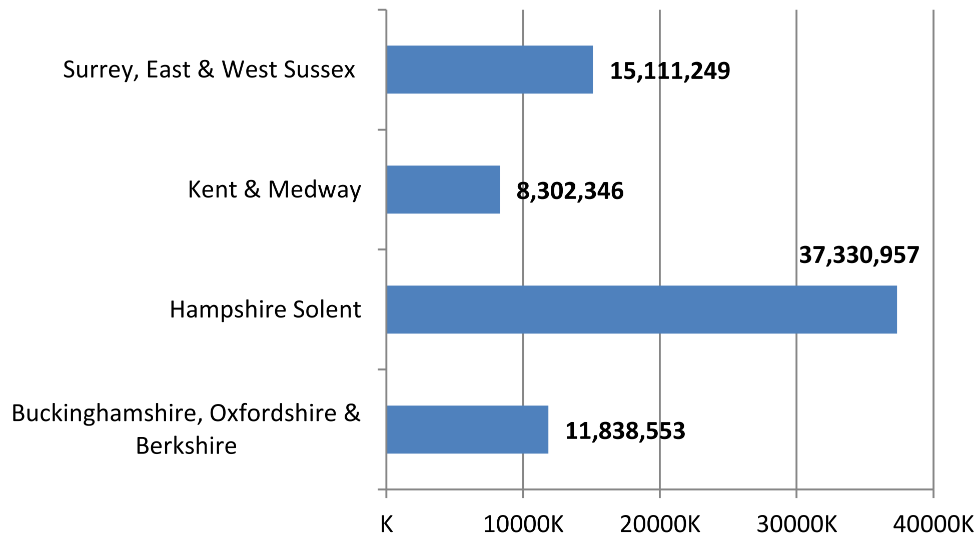
Museums were asked to provide a range of financial data including information about income sources, overall expenditure and expenditure on staffing. 77% (97) of respondents offered financial data for the financial year 1st April 2017 – 31st March 2018. Therefore the data presented here should be considered a guide, rather than being representative of a specific financial period.

Income

The total income generated and received by museums in 2017/18 was £2,583,105, which breaks down as follows:

- £39,296,583 (n.117) in earned income (including admissions, retail, catering, events, hospitality, educational and other earned income from trading, e.g. property rental)
- £14,633,332 (n.74) received in regular public funding (including Arts Council Major Partner Museum or National Portfolio funding.
- £8,928,988 (n.62) received in grant funding
- £9,724,202 (n.115) received in contributed income (including all money received in donations, friends members/schemes, any sponsorship income, corporate membership, or other non-earned income)

Figure 13: Total generated income by sub-region



Breakdown of income

Breakdown of total income by museum size is as follows:

- £4,830,208 generated by museums with 9,999 or less visits per annum; an average of £98,576 per museum (n.49)
- £8,882,369 generated by museums with 10,000 – 49,999 visits per annum; an average of £210,872 per museum (n.44)
- £10,918,304 generated by museums with 50,000 – 99,999 visits per annum; an average of £642,253 per museum (n.17)
- £47,952,225 generated by museums with 100,000+ visits per annum; an average of 32,997,014 (n.16)

Breakdown of total income by sub region is as follows:

- Surrey, East and West Sussex (n.39) an average total income of £731,980 ranging from £320 - £5,625,827
- Kent and Medway (n.13) an average total income of £638,642 ranging from £3,781 – 5,838,176
- Hampshire Solent (n.51) an average total income of £731,980 ranging from £1,485 - £7,053,009
- Buckinghamshire, Oxfordshire and Berkshire (n.23) an average total income of £514,720 ranging from £1,127 - £4,516,998

* ‘Other’ shown in Figure 14 represents respondent museums in the charged categories: 3 National Trust, 4 Military and 2 National. ‘Other’ shown in Figure 14 represents respondent museums in the free admission categories: 3 Military and 3 University.

Figure 14: Total income by charging model per museum type

	Total and average income for museums with charged admission	Sample	Total and average income for museums with free admission	Sample
Regional	£61,549,316 £961,708	64	£11,033,789 £177,964	62
Independent	£28,656,485 £682,297	42 of 64	£5,153,418 £135,616	38
Local Authority	£10,417,846 £801,373	13 of 64	£5,013,825 £278,546	18
Other*	£22,474,985 £2,497,221	9 of 64	£866,546 £144,424	6

* ‘Other’ shown in Figure 14 represents respondent museums in the charged categories: 3 National Trust, 4 Military and 2 National. ‘Other’ shown in Figure 14 represents respondent museums in the free admission categories: 3 Military and 3 University.

Admission charges

Museums were asked whether they charged for admission:

- 100% (129) of museums responded to this question
- 48% (62) reported that they charged for admission in 2017/18
- 50% (64) offered free entry all year round
- 2% (3) said that they charged seasonally/for some exhibitions

Based on the returns of 50% (62) museums who charge admission, £20,546,489* was generated in admissions income.

The admission charge for an adult ticket ranged between £1 and £35; the admission charge for a child ticket ranged between £1 and £15. Eight museums with adult admissions provide free entry for children.

Figures 15 and 16 shows the average admission charges for museum by size. 47% (61) of museums provided information on their adult admission charges, and 45% (58) provided information on admission charges for children. This includes nine museums which provide free entry for children visiting with an adult on entry. Of these museums five were in the Small, three within the Medium and one within the Large category.

* One National Trust property was unable to provide data on admissions income but reported almost 150,000 visits during 2017/18.

Figure 15: Average adult admission charges by museum size

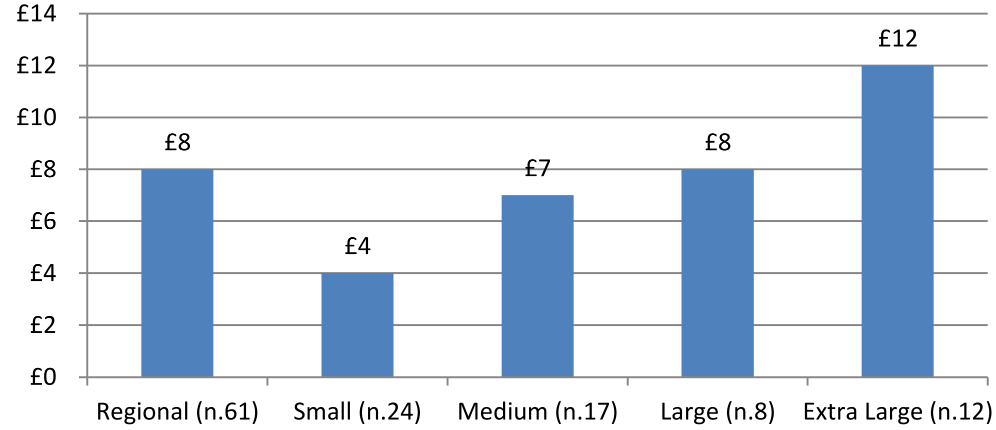
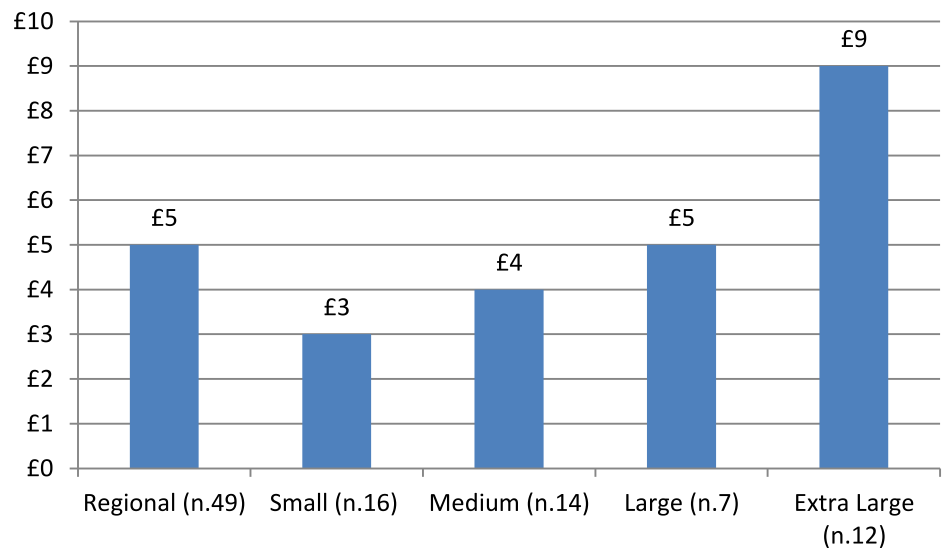


Figure 16: Average child admission charges by museum size



Retail income

Retail is a valuable additional source of income to many museums and can directly support the visit experience. The information provided here can give a useful insight into key indicators for museum retail operations.

108 (84%) of respondent museums have a shop or retail space of which 106 (82%) provided retail revenue. Data provided by museums within the Large (50,000-99,999) category was especially robust with 94% of these museums providing actual, rather than estimated, retail income.
*The information shown in Figure 18 represents actual rather than estimated retail income for 80% of respondent museums with free admissions and 83% of actual rather than estimated retail income for museums with charged admission.

Catering income

Providing the opportunity for refreshments as part of the visitor experience can be another feature that extends the stay.

- 36% (47) had an in-house café/refreshment facilities of which all 47 reported catering income of £2958,922 and an average of £62,956 across the group ranging from £80 to almost £700,000.
- 8% (10) contracted out their café/refreshments of which 6 reported catering income of £319,904 and an average of £53,317 across the group.

A total of £3,278,826 was generated in catering income across the 53 museums in 2017/18.

Figure 17: Average retail spend per head by museum size

	Total retail income and Average per museum	Average spend per head across sample	Lowest	Highest	Sample
9,999 and under	£145,439 £4,155	£0.87	£0.04	£2.99	35 of 106
10,000 – 49,999	£877,605 £22,503	£0.97	£0.02	£5.48	39 of 106
50,000 – 99,999	£1,201,955 £70,703	£1.04	£0.05	£4.18	17 of 106
100,000+	£3,178,113 £211,874	£0.96	<£0.01	£2.79	15 of 106

Figure 18: Average retail spend per head by charging model

	Total retail income and average per museum	Average retail spend per head	Lowest retail spend per head	Highest retail spend per head	Sample
Free admission	£760,563 £16,534	£0.55	<£0.00	£3.51	46 of 106*
Charged admission	£4,642,548 £77,376	£1.25	£0.05	£5.48	60 of 106*

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.

89% (115) of museums provided information on their donations. The total income generated through donations in the region was £6,247,459 in 2017/18. Figures 19 and 20 present this information by size and charging model. Within figure 20 there are two museums in the Small category which presented significantly higher donations income within the group. Results generated from the remaining cohort of 43 is presented below in italics. The same approach has been taken with one museum in the Medium category within Figure 19 and within Figure 20.

Similarly to the approach outlined within the previous two sections, charged admission in Figure 19 and 20 also includes museums who charge seasonally of for some exhibitions.

Figure 19: Average donations spend per head by museum size

	Regional Total and Average per museum	Average Per head	Lowest Per head	Highest Per head	Sample
9,999 and under*	£202,105 £4,491	£1.49 *£0.90*	£0.01 *£0.01*	£14.34 *£5.13*	45 of 115 *43 of 115*
10,000 – 49,999	£1,050,382 £26,260	£0.98 *£0.57*	£0.01 *£0.01*	£16.87 *£6.01*	40 of 115 *39 of 115*
50,000 – 99,999	£356,596 £23,773	£0.35	£0.01	£2.28	15 of 115
100,000+	£4,638,376 £309,225	£1.04	£0.03	£4.22	15 of 115

Figure 20: Average donations spend per head by charging model

	Regional Total and Average per museum	Average	Lowest	Highest	Sample
Free admission	£311,644 £5,467	£0.79 *£0.54*	£0.01 *£0.01*	£14.37 *£4.83*	57 of 64 *56 of 64*
Charged admission	£5,935,815 £102,342	£1.42 *£0.92*	£0.01 *£0.01*	£16.87 *£6.01*	58 of 61 *56 of 61*

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 £15,898,946 of direct, indirect and induced impacts in the South East as a result of spending on goods and services by museums.

This calculation is based on museum expenditure figures, excluding staff spend, from 95% (122) 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.

33% (42) of museums specified that they had received capital investment in 217/18, totalling £10,330,760.

Expenditure and staff costs

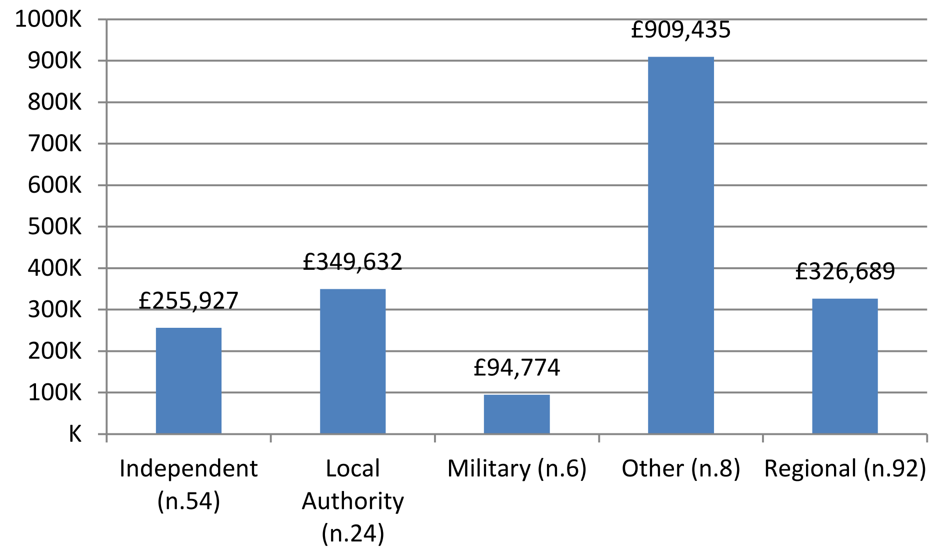
88% (113) museums provided information on their expenditure on staff costs. 72% (92) of these museums employ staff and provided figures for both total expenditure and expenditure on staff costs.

There was a reported total of £30,117,119 expenditure on staff costs by 92 museums in 2017/18:

- 6 spent less than 20% of total expenditure on staffing costs
- 7 spent an average of between 21% and 30%
- 7 spent an average of between 31% and 40%
- 19 spent an average of between 41% and 50%
- 9 spent an average of between 51% and 60%
- 22 spent an average of between 61% and 70%
- 13 spent an average of between 71% and 80%
- 9 spent an average of between 81% and 100%

In Figure 21 ‘Other’ represents data provide by 8 respondent museums of which three museums are a single site National museum, two are National Trust properties and three are University museums. There are insufficient respondents to present this data across all six museum type.

Figure 21: Average expenditure on staff by museum type



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. 82% (106) of museums provided data on both these questions. 15% (19) of respondent museums do not employ any paid staff and operate with a wholly volunteer workforce. 57% (50) of the respondent museums reported actual figures for paid staff, whilst the remaining 43% (38) reported that their figures were estimates.

- Museums employed 1808 paid staff based on 88 responses which equates to 1003 FTE posts
- 58% (51) reported that they employed 5 FTE or fewer members of staff. Across this group they employed 105 FTE and an average of 2 FTE per museum
- 14% (12) reported that they employed between 6 – 10 FTE staff. Across this group they employed 91 FTE and an average of 8 FTE per museum
- 15% (13) reported that they employed between 11 – 20 FTE staff Across this group they employed 187 FTE and an average of 14 FTE per museum
- 7% (6) reported that they employed between 21 – 50 FTE staff. Across this group they employed 146 FTE and an average of 24 FTE per museum
- 7% (6) reported that they employed between 51 – 115 FTE members staff. Across this group they employed 474 FTE and an average of 79 FTE per museum

The 15 museums within the Extra Large category employ an average of 43 FTE per museum and 64% of the total FTE staff reported by the 88 museums. This group comprises of 7 Independent, 4 Local Authority, 3 National and 1 University museums.

Employment impacts

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

- These sample museums created 2175 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.

Volunteers

Volunteers are a vital part of the museum workforce. In the South East, only one of the 116 museums providing data on the number of volunteers, reported that they did not operate with the support of volunteers. The remaining 115 museums reported a total of 6462 volunteers.

- 15% (19) of respondent museums reported that they are entirely volunteer run
- The total number of volunteer hours recorded was 618,332 which equates to 375 FTE based on 1,650 hours worked per year.
- Volunteer hours are estimated to have contributed over £4.1 Million to museums. This value is based on a calculation of £50 per day using guidance issued by the Heritage Lottery Fund.

South East Museum Development support

Museums were asked about support or advice they had received, here is a selection of what they said:

'Always supportive and professional and respond well to any unexpected problems we may have'

Hastings Fishermen's Museum

'With the support of SEMD, the Gallery received £13,042 for a new data logging system. The updated system means we are in a better position to take care of our collections and are able to report to lenders and stakeholders more accurately.'

Pallant House Gallery

'Extremely supportive and helpful. When you are a new Trust and museum this support is very, very valuable.'

Paralympic Heritage Centre

'We have received considerable support advice and encouragement from the SEMDP team which has enabled us to survive a very steep learning curve in putting together a group of volunteers to learn how to operate a museum.'

Whitstable Museum and Gallery

'MDO advice is always extremely helpful. We received both a Development grant and Ready to Borrow grant, for both of which we received excellent advice and support throughout the applications'

The Novium

'… we had amazing support in the run up to our Accreditation application'

Ripley Museum

'Advice is always helpful and relevant. We've gone on to participate in the Museum MOT and successfully apply for Level Up funding.'

River and Rowing Museum

'We get support from the MDO and routinely use that advice for Board training and development.'

New Forest Centre

'Good advice to the Board of Trustees regarding fund raising. Good practical advice on day to day matters to staff.'

The King's Royal Hussars Museum

'We have received a lot of support and are very grateful. it is a great team to be working with.'

The Shipwreck Centre and Maritime Museum

'Very useful support from South East MD programme for collections and preventative Conservation.'

West Berkshire Museum

'a fabulous excellent service; we have accessed grant support plus training'

Mary Rose Ship Hall and Museum

South East Museum
DEVELOPMENT PROGRAMME

With thanks to the following museums for participating

Aldershot Military Museum
Amersham
Andover Museum
Anne of Cleves House Museum
Arundel Museum
Ash Museum
Ashford Borough Museum
Barbican House Museum and Lewes Castle
Basing House
Battle Museum of Local History
Bexhill Museum
Bishops Waltham Museum
Bletchley Park
Bloxham Village Museum
Blue Town Heritage Centre
Bluebell Railway Museum
Booth Museum of Natural History
Brighton Museum and Art Gallery
Buckingham Old Gaol
Burlesdon Windmill
Charles Dicken's Birthplace
Chilcomb House
Chiltern Open Air Museum
Cowes Maritime Museum
Cranbrook Museum
Crawley Museum Centre
Cuckfield Museum
Cumberland House Natural History Museum
Curtis Museum and Allen Gallery
D-Day Museum
Didcot Railway Centre
Dimbola Museum and Galleries
Dinosaur Isle
Eastleigh Museum
Eden Valley Museum
Egham Museum
Emsworth Museum
Explosion! The Museum of Naval Firepower
FAST Museum
Fishbourne Roman Palace
Fordingbridge Museum
Gilbert White and The Oates Collections
Godalming Museum
Gosport Discovery Centre
Guildhall Museum
Haslemere Educational Museum
Hastings Fishermen's Museum
Henfield Museum
Hove Museum and Art Gallery
Hughenden Manor
Kent Museum of Freemasonry
Kent Police Museum
Lamb House
Littlehampton Museum
London Bus Museum
Maidstone Museum and Bentlif Art Gallery
Marlipins Museum
Mary Rose Ship Hall and Museum
Michelham Priory
Milestones - Hampshire's Living History Museum
Milton Keynes Museum
Milton's Cottage
Museum of Army Flying
Museum of English Rural Life
Museum of the Iron Age
Museum Resource Centre Oxfordshire
National Motor Museum
New Forest Centre
Newport Roman Villa
Newtown Old Town Hall
Oxford Bus Museum
Oxfordshire Museum
Pallant House Gallery
Paralympic Heritage Centre
Portsmouth Museum
Powell-Cotton Museum, Quex House and Gardens
Preston Manor
Priest House
RAF Manston Spitfire and Hurricane Memorial Museum
Reading Museum
Red House Museum and Garden
Rifles Collection
Ripley Museum
River and Rowing Museum
Rockbourne Roman Villa
Royal Green Jackets (Rifles) Museum
Royal Holloway Art Collections
Royal Navy Submarine Museum
Royal Pavilion
Rural Life Centre
Rustington Museum
SeaCity Museum
Seaford Museum and Heritage Centre
Southampton City Art Gallery
Southsea Castle
Steyning Museum
Sussex Cricket Museum
Swalcliffe Barn
Tenterden and District Museum
The Brickworks Museum, Bursledon
The Cole Museum of Zoology
The Diving Museum
The Guardroom Museum (Adjutant's General Corps Museum)
The Gurkha Museum
The Historic Dockyard Chatham
The Hockey Museum
The King's Royal Hussars Museum in Winchester
The Lightbox
The National Museum of the Royal Navy, Portsmouth (Portsmouth Historic Dockyard)
The Novium Chichester
The Roald Dahl Museum and Story Centre
The Royal Hampshire Regiment Museum
The Royal Observer Corps Museum
The Seaside Museum Herne Bay
The Shipwreck Centre and Maritime Museum
Tom Brown's School Museum
Tudor House and Garden
Tunbridge Wells Museum and Art Gallery
Vale and Downland Museum
West Berkshire Museum
Westbury Manor Museum
Westgate Museum
Whitchurch Silk Mill
Whitstable Museum and Gallery
Willis Museum
Winchester City Museum
Windsor and Royal Borough Museum
Worthing Museum and Art Gallery
Wycombe Museum

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www.southwestmuseums.org.uk

For further information on this report or the South East Museum Development programme please contact NAME DETAILS and EMAIL

Photo credit: Red House Museum and Gardens