South East Museum Development Programme

Annual Survey of Museums 2018-19

South East Museum
DEVELOPMENT PROGRAMME

Supported using public funding by
ARTS COUNCIL ENGLAND

Summary of findings

Response rate

- 149 (62%) of Accredited museums responded to the survey. A further four of the 12 museums Working Towards Accreditation (WTA) responded to the survey. As a result 153 (60%) of the 253 Accredited and WTA museums are considered within this report.

Audiences

- There was a total of 6,568,954 visits to museums based on responses received.
- Museums held a total of 6,513 activities and events that engaged 219,286 participants.

Educational engagement

- Museums delivered 8,243 formal learning and outreach sessions engaging 313,630 participants in these activities. This includes both on-site and off-site activities.

Online engagement

- 88% of respondent museums have editorial contract over their website. 27% of respondent museums are within multisite museum organisations.
- 92% use social media to engage audiences online.

Financial operations

- £40,822,936 was generated by 87% of respondent museums in earned income (including admissions, retail, catering, events, hospitality, educational and other earned income from trading, e.g. property rental).
- £10,241,915 received by 37% of respondent museums in regular public funding (including Arts Council England’s National Portfolio funding).
- £1,332,207 received in grant project funding by 29% of respondent museums.
- £6,077,888 received in contributed income (including all money received in donations, friends members/schemes, any sponsorship income, corporate membership, or other non-earned income) by 88% of respondent museums.

Economic impact

- Known visits to museums had a gross visitor impact of £127.9 million in the South East economy.
- At least £37.7 million of direct, indirect and induced impacts as a result of spending on goods and services by museums.
- At least 1502 Full Time Equivalent (FTE) direct, indirect and induced jobs were supported by museums.

Workforce – volunteers

- There were 8,254 active volunteers.
- Volunteers contributed a total of 988,416 hours to museums, equivalent to 599 Full Time Equivalent posts.
- Volunteer time was worth £6.5 million to museums.

Workforce – paid staff

- Museums employed 1,667 paid staff or 992 FTE based on 102 responses.
- 23% of respondent museums were entirely volunteer-run with no paid staff.

Introduction and survey method

This report presents the findings of the fourth South East Museum Development (SEMD) Annual Survey of Museums.

The survey was created in the South West in 2012 to establish a baseline of data on museums in the region and is now being used to analyse and report on trends across England's nine regions. Findings will contribute to estimates of the social and economic impact of museums and also help inform how SEMD, and other participant Museum Development providers, deliver support to museums. The data within this report can enable museums to benchmark themselves against a range of comparators.

The methodology 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 considered approaches from pre-existing data collection exercises within the sector.

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 to deliver the South East Museum Development Annual Survey of Museums since 2013-14.

Survey method

The survey was sent to all museums in the South East region who are fully Accredited, provisionally Accredited or formally Working Towards Accreditation. It was promoted via SEMD's website and through targeted e-bulletins. Museums were given the option of either online completion or a paper copy of the survey. The majority of museums have participated via the regional online survey.

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 multi-site response are highlighted on the following page.

Survey questions relating to finance, employment, volunteer and social media have been mapped across to the National Portfolio (NPO) Annual survey. NPOs were able to submit their NPO Annual Survey for transcribing to prevent duplication of effort. A key distinction between this survey and the NPO Annual Survey is that it 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 of each of the Accredited museum sites.

The survey asks museums to provide data for the 2018-19 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 should be presented for the 2018-19 period.

The survey is divided into five sections:

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

Sample and response

62% (149) of museums within the Accreditation scheme responded to this year's survey. There are 241 Accredited museums in the region and a further 12 Working Towards Accreditation (WTA). Four of the 12 WTA museums provided a response. As a result 60% of all Accredited and WTA museums are considered within this report. A further 21 museums participated, of which 13 Accredited museums provided an insufficient partial along with a further eight non Accredited museum. The number of Accredited museums is taken from the Accreditation statistics for June 2019, the date of the Accreditation panel most recent to the period of the survey.

Museums in the South East account for 18% of all Accredited museums in England. There has been an 9% increase in response rate between this and last year's survey.

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

This is the second year in which the SWMD methodology for data collection from museum service providers who operate multi-site and/or co-located museum sites has applied a bespoke template rather than via the online form. 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.

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

Where a single museum site includes more than one Accredited museum collection and is unable to provide data for the individual Accredited museum 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.
Nine multi-site organisations provided survey returns, representing 43 museums, 29% of the return rate.

Profile of respondents

60% (153) of the 241 Accredited and 12 Working Towards Accreditation (WTA) 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 9% higher than in 2017-18 which had participation of 51% 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 returns are broadly representative across the governance types and range from 20% for English Heritage to 75% for Independent museums. 59% of Local Authority museums participated in the survey. The type of museum applied is based on the UK Museum Accreditation Scheme, Arts Council England. In 2019 the category for 'Military' has been removed and reallocated to either Independent or to National. Three museums (1%) were closed for redevelopment and therefore unable to provide the information required for the survey.

Figure 1: All Accredited museums by type

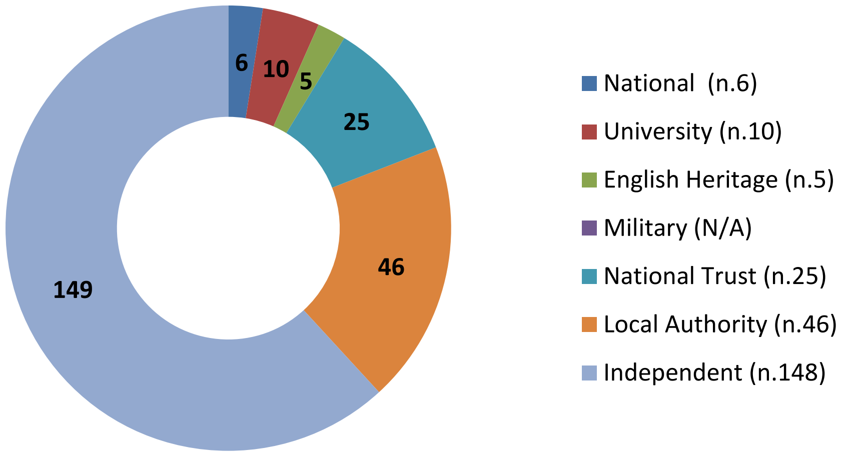
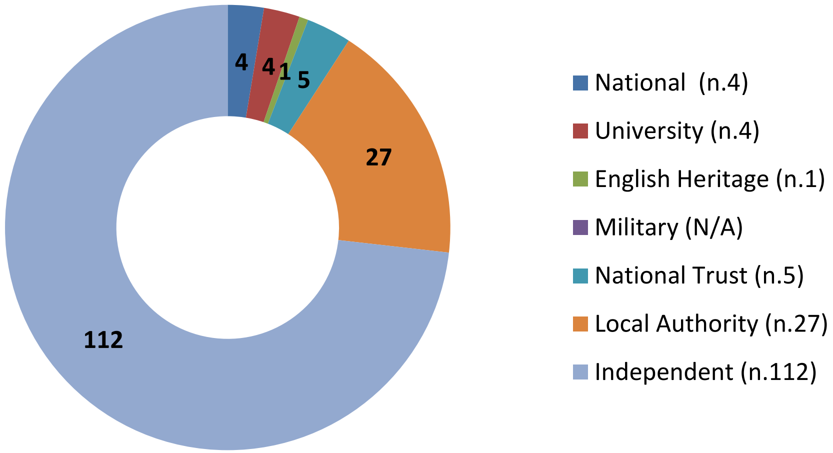


Figure 2: Respondent Accredited museums by type



Museum opening arrangements

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

- 59% (90) reported that they were open all year round
- 34% (52) reported that they were closed part of the year as regular seasonal closure
- 2% (3) reported that they were open by appointment only
- 5% (8) of museums were closed for the year/part of the year for redevelopment, refurbishment and/or repair

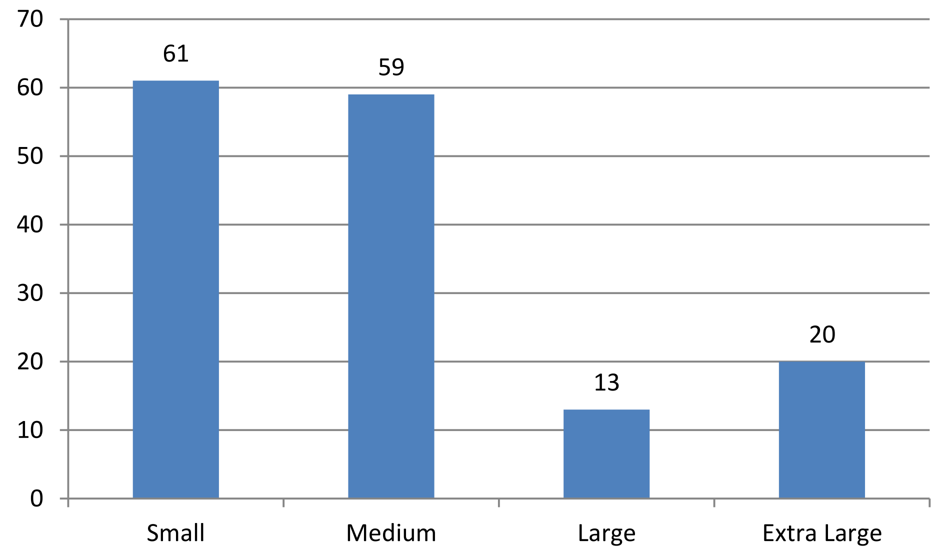
Respondents by size

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

78% 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 UK's largest population at 9.1m (2017) and projected to grow to 10.5m by 2039.

On 1 April 2019 the Local Government Review resulted in the district of Christchurch in Hampshire being incorporated within the newly formed council of Bournemouth, Christchurch and Poole, BCP Council. For the purposes of reporting in 2018-19 the museums in this area are retained within the Hampshire Solent sub region and in line with the UK Museum Accreditation statistics.

Figure 4: Respondents by sub-region

Sub-region	No. of respondents/no. of Accredited museums	Percentage return rate
Buckinghamshire, Oxfordshire & Berkshire*	32 of 57	56%
Hampshire Solent	55 of 77	71%
Kent & Medway	23 of 42	55%
Surrey, East & West Sussex	43 of 77	56%
Total (Accredited)	153 of 253	60%

Audiences

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

Total visit figures

A total of 6,568,954 visits were made to museums in 2018-19 based on the responses received. 60% of the total visits reported were delivered by the 20 (13%) museums within the 100,000+ museums category. The 61 museums within the 9,999 and under category account for 4% of the total reported visits.

Figure 5 presents visit figures for the 153 museums presenting data

- 61 Small museums (40%) received an average of 3,854 visitors
- 59 Medium museums (39%) received an average of 24,969 visitors
- 13 Large museums (8%) received an average of 71,363 visitors
- 20 Extra Large museums (13%) received an average of 196,647 visitors

Museum opening hours

Museums reported opening hours as follows:

- 97% (148) of museums reported opening hours
- Opening hours in ranged from 27 hours to over 2,500
- Opening hours totalled 218,049 and an average of 1,473

Figure 5: Visit figures by museum size

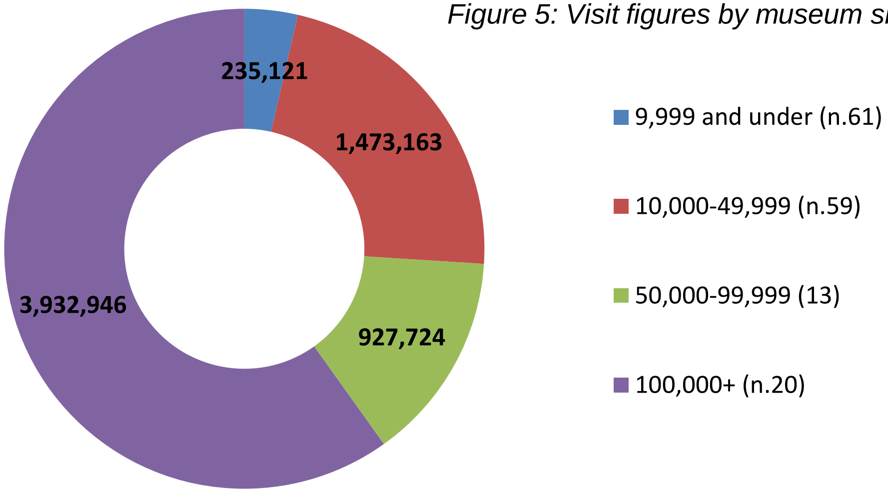
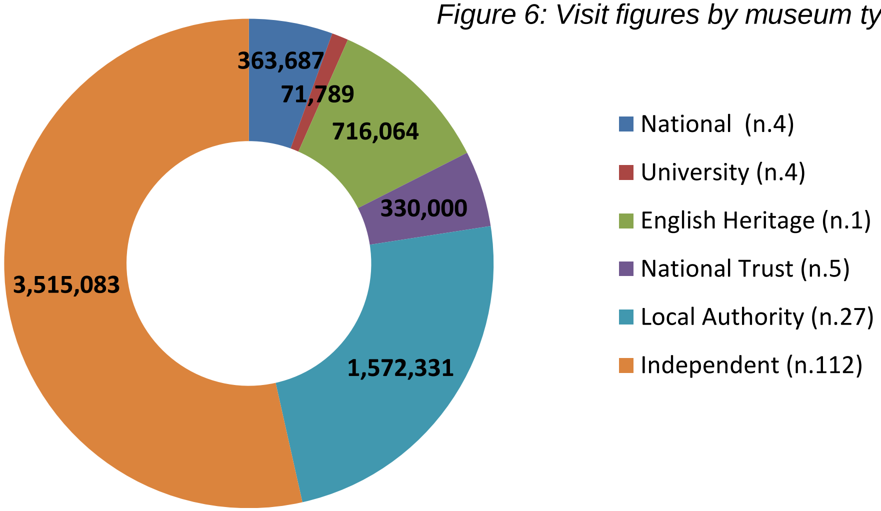


Figure 6: Visit figures by museum type



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 6.

When considering the visit figures by sub region it should be noted how the Extra Large museums influence visit numbers:

- 73.7% of all visits in Kent are made to 5 Extra Large museums
- 66.3% of all visits in Hampshire Solent are made to 8 Extra Large museums
- 52.2% of all visits in Buckinghamshire, Oxfordshire and Berkshire are made to 3 Extra Large museums
- 43.6 of all visits in Surrey, East and West Sussex are made to 4 Extra Large museums

Figure 7: Visit figures by sub-region

Sub-region	Total visit figures	Percentage of regional visit figures	Average visit figures
Buckinghamshire, Oxfordshire & Berkshire	1,091,133	16.6%	34,098
Hampshire Solent	2,440,244	37.1%	44,368
Kent & Medway	1,398,899	21.2%	60,822
Surrey, East & West Sussex	1,638,678	24.2%	38,109
Total Region	6,568,954	100%	42,934

Visits by children

69% (106) of respondent museums provided a breakdown of adult and child (under 16) visits. 28% (43) of these respondents reported actual figures for both adult and child visitors. 1,210,700 visits by children to museums in the South East were reported in 2018-19.

Where museums reported a breakdown these represented 2,973,829 adult visits and 1,210,700 child visits. This would estimate child visits to represent 29% of all visits to museums. Data provided from the 43 museums whom provided 'known' rather than 'estimated' numbers reported a slightly lower percentage of 26.6% child visits.

Figure 8: Visits by children by museum size

Museum size	Total visits by children	Number of museums	Average Child visits	Percentage of child visits
9,999 and under	25,410	43	591	16.5%
10,000-49,999	257,085	42	6,121	27.1%
50,000 – 99,999	124,316	7	17,759	31.3%
100,000+	803,889	14	57,421	29.9%
Total Region	1,210,700	106	11,422	29.0%

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 9: AIM Economic Impact Toolkit assumed visitor spend

Sub-region	'Local' visitor assumed spend	'Day' visitor assumed spend	Gross Visitor impacts
Buckinghamshire, Oxfordshire & Berkshire	£5,359,565	£20,236,521	£25,596,086
Hampshire Solent	£9,916,603	£37,760,415	£47,677,019
Kent & Medway	£5,710,433	£22,906,172	£28,616,605
Surrey, East & West Sussex	£6,602,419	£19,447,746	£26,050,165

Using this toolkit the gross visitor impact was £127,939,875 in the South East's Economy based on the visit data provided by 60% of Accredited museums in the region:

- There was a reported £27,589,021 in 'local' visitor spend in 2018-19
- There was a reported £100,350,854 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 4,778,799 based on the adult/child ratio of 82/18 for museums with 9,999 visits and under; 75/25 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.**

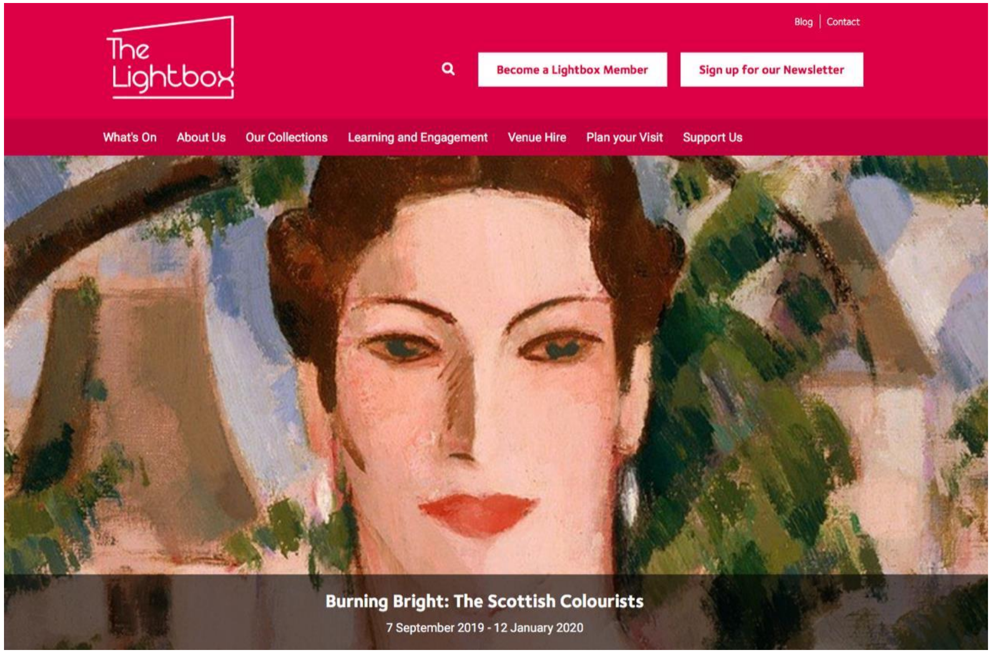
Online engagement

This survey asked museums about their online and social media presence.

Websites

88% (134) of respondent museums reported having a website for which they have editorial control. 36 of these museums are reporting as part of six multisite organisations and one co-located as a separate museum.

Whilst 12% (18) of museums reported that they did not have editorial control over their own website, the majority are featured on their host organisations website, or their parent organisation's website.



60% (92) of respondents reported a total of 5,936,515 unique visits to their websites in 2018-19. 41% (62) of respondent museums were able to provide known data.

Social media

The Visit England annual attractions trends report 2018 notes that engagement with digital communications has plateaued at 89% of participants using social media to engage with audiences. Facebook and Twitter continue to be the dominant platforms used. However the use of Instagram and Pinterest continue to rise, doubling in the past three years to 2018.

92% (141) of museums confirmed that they used social media to engage with audiences and 76% (116) provided the number of subscribers or followers that they had across their social media platforms.

These museums stated that they engaged audiences with platforms including Facebook, Twitter and Instagram most frequently cited. 76% (116) of museums reported an estimated 976,638 total subscribers or followers. 52% (80) of museums reporting total subscribers or followers were able to provide known data.

Education, sessions and participants

111 (73%) of museums in the region responding to the survey reported engagement with 10,436 schools and educational organisations during 2018-19. The number of schools ranged from one to over 5000. Seven (5%) museums confirmed that they did not engage with any educational organisations during the year.

The total number of sessions and participants, on and off-site is listed below:

- 7,018 on-site education sessions delivered by 106 museums
- 230,286 participants engaged by 111 museums
- 1,225 off-site education sessions delivered by 66 museums
- 83,344 participants engaged by 69 museums

The recording of sessions and participants varied between museums and not all respondents provided data on both the number of sessions and the number of participants. Fig 10 considers those museums who provided data on both the total number of sessions and accompanying total number of participants from which an average has been drawn and presented by size of museum.

75% (79) of the 106 museums reporting the known number of on-site Educational sessions , 57% (63) of 111 museums reported the known number of participants rather than estimated data.

Figure 10: Educational sessions

	Total Average Sample	Extra Large And Large museums	Medium and Small museums
No. of on-site sessions Average no. sessions Sample no.	6,975 66 n.105	4,173 190 n.22	2,802 34 n.83
No. of participants on-site Average no. of participants* Sample no.	177,995 1,695 n.105	103,546 4,707 n.22	74,449 897 n.83
Average number of participants per session Sample no.	25.7 n.105	24.8 n.22	26.4 n.83
No. of off-site sessions Average no. of sessions Sample no.	1,189 19 n.64	623 39 n.16	566 12 n.48
No. of participants off-site Average no. of participants* Sample no.	49,226 769 n.64	23,014 1,438 n.16	26,212 546 n.48
Average number of participants per session Sample no.	40.5 n.64	36.9 n.16	45.5 n.48

** Three museums are reporting as part of one multisite organisations, all other multi-site museums provided individual reporting for sessions and participants.*

Activities and events, sessions and participants

In addition to the previous education sessions, museums in the South East of England deliver a wider range of activities and events both on and off-site

The total number of sessions and participants, on and off-site is listed below:

- 5,234 on-site activity and event sessions delivered by 99 museums
- 121,751 participants engaged by 86 museums
- 1,279 off-site education sessions delivered by 66 museums
- 97,535 participants engaged by 79 museums

The recording of sessions and participants varied between museums and not all respondents provided data on both the number of sessions and the number of participants. Fig 11 considers those museums who provided data on both the total number of activity and event sessions and accompanying total number of participants from which an average has been drawn and presented by size of museum.

53% (49) of the 93 museums reporting the known number of on-site Activities and event sessions , 25% (23) of 93 museums reported the known number of on-site participants rather than estimated data.

Fig.11 Notes: Nine museums are reporting as part of two multisite organisations, all other multi-site museums provided individual reporting for sessions and participants.

Figure 11: Activities and events

	Total Average Sample	Extra Large And Large museums	Medium and Small museums
No. of on-site sessions **Average no. sessions** **Sample no.**	5,129 55 n.93	1,534 77 n.20	3,595 49 n.73
No. of participants on-site **Average no. of participants*** **Sample no.**	118,052 1,269 n.93	39,517 1,976 n.20	78,535 1,076 n.73
Average number of participants per session **Sample no.**	23.1 n.93	25.8 n.20	22.0 n.73
No. of off-site sessions **Average no. of sessions** **Sample no.**	1,169 15 n.79	331 21 n.16	838 13 n.63
No. of participants off-site **Average no. of participants*** **Sample no.**	97,535 1,235 n.79	40,404 2,525 n.16	57,131 907 n.63
Average number of participants per session **Sample no.**	82.3 n.79	122.1 n.16	69.7 n.63

Financial operations

Museums were asked to provide a range of financial data including information about income sources, overall expenditure and expenditure on staffing. 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. 64% (96) of respondents offered financial data for the financial year 1 April 2018 – 31 March 2019. 33% (50) of respondents reported working to different financial years.

Income

The total income generated and received by museums in 2018-19 was £58,474,945, which breaks down as follows:

- £40,822,936 (n.133) in earned income (including admissions, retail, catering, events, hospitality, educational and other earned income from trading, e.g. property rental)
- £10,241,915 (n.56) received in regular public funding (including Arts Council Major Partner Museum or National Portfolio funding.
- £1,332,207 (n.44) received in grant (revenue) funding
- £6,077,888 (n.134) received in contributed income (including all money received in donations, friends members/schemes, any sponsorship income, corporate membership, or other non-earned income)

Income was reported by 92% (139) of respondent museums across one or more category of income :

- £37,874,895 of income was reported by 29 of 139 (21%) Extra Large or Large museums representing 65% of total income reported
- £20,600,050 of income was reported by 112 of 139 (79%) Medium or Small museums representing 35% of total income reported
- £1,306,031 is the average income reported for an Extra Large or Large museum and £183,929 for a Medium or Small museum

Figure 12: Sources of income across all respondents

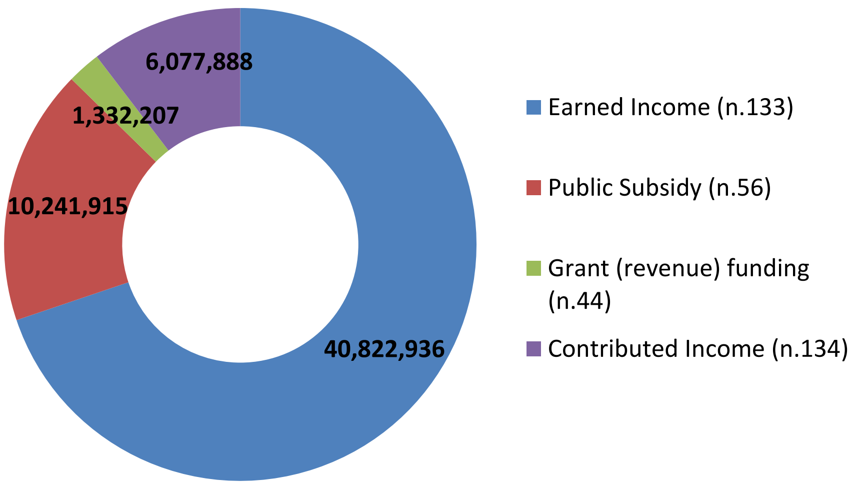


Figure 12 above presents all data reported across the four categories of income. 79% of all income reported is generated from Earned income (69%) and Contributed income (10%). 2.3% of income is generated through revenue grant funding from trusts, foundations and grant bodies. Public subsidy represented 18% of all income reported. In addition to the 55 museums reporting income from public subsidy a further 11 museums confirmed they received a public subsidy however they were unable to provide a value.

Breakdown of income

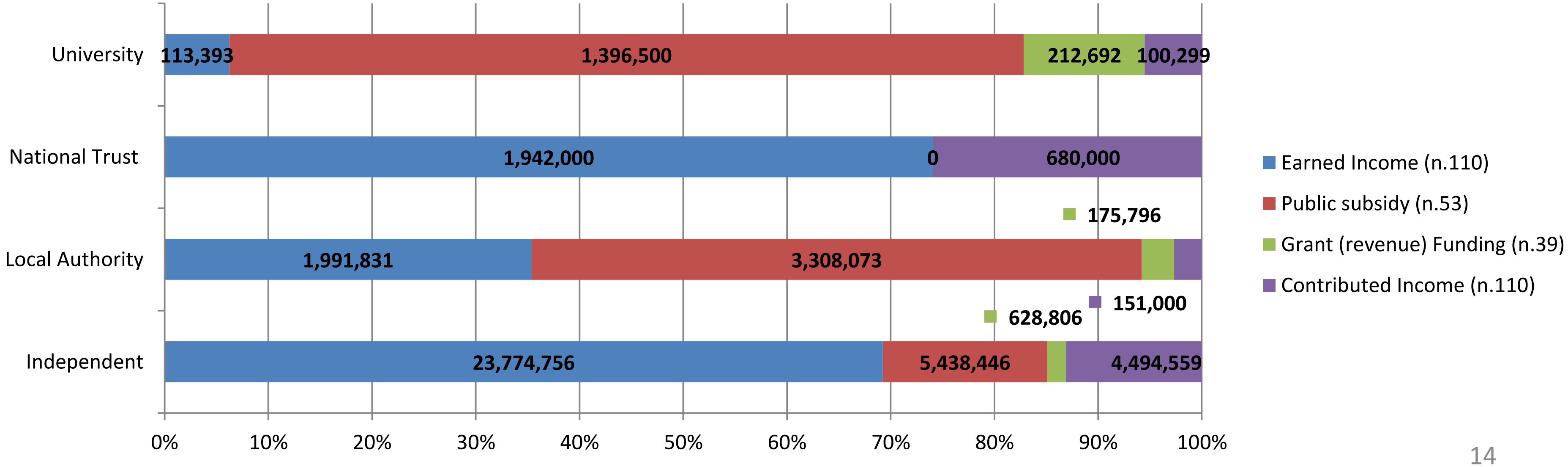
Breakdown of total income by museum size is as follows:

- £5,020,643 generated by museums with 9,999 or less visits per annum; an average of £85,096 per museum (n.59)
- £15,579,408 generated by museums with 10,000 – 49,999 visits per annum; an average of £293,951 per museum (n.53)
- £7,105,224 generated by museums with 50,000 – 99,999 visits per annum; an average of £645,929 per museum (n.11)
- £30,769,670 generated by museums with 100,000+ visits per annum; an average of 1,709,426 (n.18)

The following breakdown of income, presented in figure 13 below, generated by museum type considers only those museums in the group of 120 museums providing income data across all relevant income categories . Some respondent museums were able to confirm income was generated via an income category but were unable to provide an accompanying value. In this instance the museum is omitted from the sample group. This approach is intended to provide more accuracy in understanding the distribution of funding across museums in the region.

116 (76%) museums provided sufficient information across the income categories and generated a total income of £502,324. Independent, Local Authority, National Trust and University museums are included within this same group.

Figure 13: Breakdown of income sources by museum type



Admission charges

Museums were asked whether they charged for admission:
- 99% (152) of museums responded to this question
- 50% (76) reported that they charged for admission
- 47% (73) offered free entry all year round
- 2% (3) said that they charged seasonally/for some exhibitions

Based on the returns of 45% (69) museums who charge admission and provided admissions income, £22,075,260 was generated in admissions income.

The admission charge for an adult ticket ranged between £1 and £18.50; the admission charge for a child ticket ranged between £1 and £15. 14 museums with adult admissions provide free entry for children.

49% (75) of museums provided information on their adult admission charges, and 40% (61) provided information on admission charges for children. This includes 14 museums which provide free entry for children visiting with an adult on entry.

The range of admissions is shown below by size of museum:
- Small museum admission charges for adults ranges from £1.00-£9.00
- Small museum admission charges for a child ranges from £1.60-£6.00
- Medium museum admission charges for adults ranges from £2.00-£18.00
- Medium museum admission charges for a child ranges from £1.00-£13.00
- Large museum admission charges for adults ranges from £5.20-£18.00
- Large museum admission charges for a child ranges from £2.70-£13.00
- Extra Large museum admission charges for adults ranges from £8.50-£25.00
- Extra Large museum admission charges for a child ranges from £6.00-£15.00

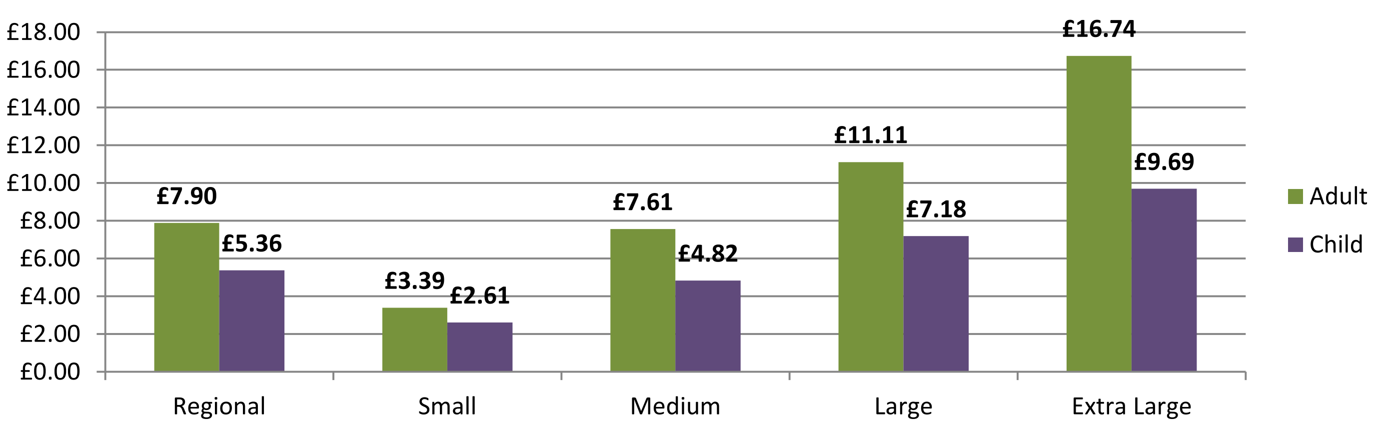


Figure 14: Average adult and child admission charges by museum size

Retail income

Museums were asked to provide information on their income from their shops and retail offer.

95% (145) museums provided information with 130 confirming that they operate some form of retail at the museum. 83% (127) museums providing information on their retail income. The total income from retail reported across these museums was £6,094,199.

** One museums data has been omitted as a single site within a multi-site and therefore the data cannot be used to calculate a spend per head.*

Figure 15: 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	£255,747 £5,115	£1.14	£0.02	£12.32	n.50
10,000 – 49,999	£1,769,981 £34,038	£1.64	£0.01	£9.15	n. 52 and n.51*
50,000 – 99,999	£1,011,199 £91,927	£1.82	£0.10	£4.18	n.11
100,000+	£3,057,272 £218,377	£1.43	£0.05	£10.42	n.14

Figure 16: Average retail spend per head by charging model

	Total and average retail income per museum	Average retail spend per head	Lowest retail spend per head	Highest retail spend per head	Sample
Free admission	£783,585 £14,247	£0.83	£0.01	£8.12	n.55
Charge for some exhibitions/ seasonally	£87,942 £29,314	£0.54	£0.10	£0.85	n.3
Charged admission	£5,222,672 £75,691	£1.97	£0.05	£12.32	n.69 and n.68*

Catering income

A total of £4,592,960 was generated in catering income across the 57 museums in 2018-19.

- 34% (53) had an in-house café/refreshment facilities and reported catering income of £4,402,384 and an average of £83,064 across the group
- 1% (4) contracted out their café/refreshments and reported catering income of £190,576 and an average of £47,644 across the group

Donations

Museums were asked to provide information on their donations and all other monies received from the general visiting public.

85% (130) of museums provided information on their donations. The total income generated through donations in the region was £2,310,065 in 2018-19. Figures 17 and 18 present this information by size and charging model.

The approach for calculating donations income per head has been to divide total donations reported by adjusted adult visitor numbers.

**Within figure 17 there are two museums in the Medium category size and one in the Small category size which presented significantly higher donations income within the group which have been omitted from the per head calculation.*

** Within figure 18 there is one museum in the free admission and two museums in the charged admission which presented significantly higher donations income within the group which have been omitted from the per head calculations.*

Figure 17: 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*	£252,220 £4,671	£1.04	£0.04	£7.49	n.54 and n.53*
10,000 – 49,999	£1,244,883 £25,406	£0.56	<£0.01	£8.97	n.49 and n.47*
50,000 – 99,999	£173,281 £17,328	£0.43	£0.01	£3.10	n.10
100,000+	£639,681 £37,628	£0.22	<£0.01	£1.45	n.17

Figure 18: Average donations spend per head by charging model

	Regional Total and Average per museum	Average Per head	Lowest Per head	Highest Per head	Sample
Free admission	£336,049 £5,601	£0.62	<£0.01	£4.75	n.60 n.59*
Charged for some exhibitions/ seasonally	£31,908 £10,636	£1.33	£0.03	£3.90	n.3
Charged admission	£1,942,112 £28,987	£0.76	<£0.01	£8.97	n.67 and n.65*

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 £37,737,673 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 76% (117) of respondent museums and takes into account 'leakage', 'displacement', 'deadweight' and multiplier factors using estimates developed by DC Research:

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

Capital investment

Capital investment is important in enabling museums to improve or expand their business in order to ensure that they can provide engaging spaces for audiences and respond to changing visitor demographics and expectations.

While you would not expect capital investment to be consistent year on year it can provide a useful indicator of the long term strategic investment in the sector.

25% (38) of museums specified that they had received capital investment in 2018-19, totalling £7,524,908.

5% (8) of respondent museums received £6,710,815, 89% of the total capital investment reported by the 37 museums in the South East of England.

Expenditure and staff costs

60% (91) museums provided information on their expenditure on staff costs. These museums reported £27,439,356 of expenditure on staff costs in 2018-19.

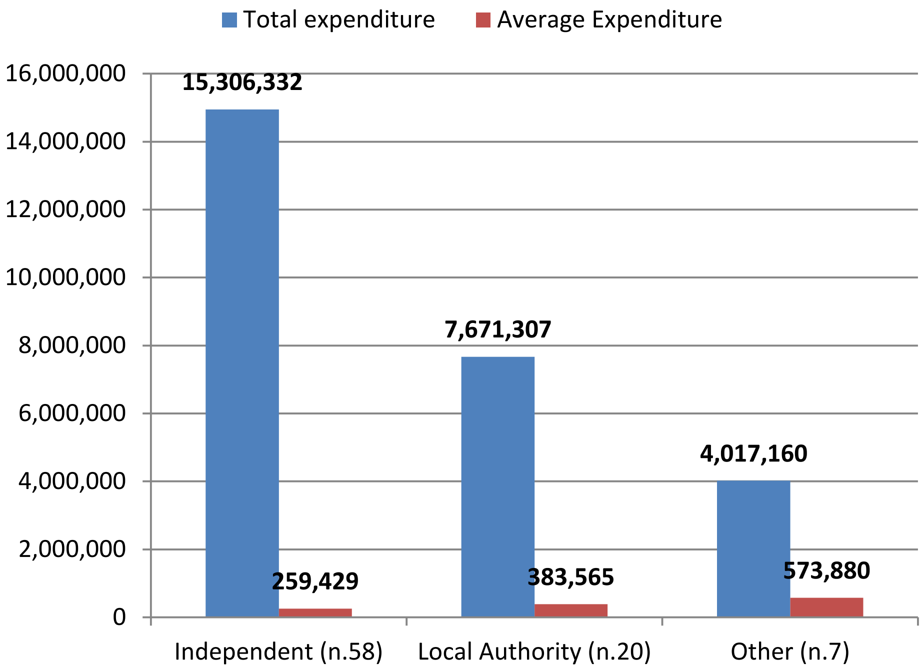
56% (86) of these museums employ staff and provided figures for both total expenditure and expenditure on staff costs. These museums reported £26,994,798 of expenditure on staff costs in 2018-19. The median value for expenditure on staff costs across this group of 86 museums was £91,048 (55%) in 2018-19. Three further museums provided figures that were omitted due to anomalies in the values provided for total expenditure.

- 8 spent less than 25% of total expenditure on staffing costs
- 10 spent an average of between 25% and 40%
- 8 spent an average of between 41% and 50%
- 8 spent an average of between 51% and 60%
- 6 spent an average of between 61% and 70%
- 7 spent an average of between 71% and 80%
- 6 spent an average of between 81% and 90%
- 3 spent an average of between 91% and 99%

Based on the information provided by the 56% (86) museums the following average of spend on staffing as a total of expenditure can be considered by museum governance type:

- Independent museums spend, on average, 54% of total expenditure on staffing costs
- Local Authority museums spend on average 59% of total expenditure on staffing costs
- The remaining seven museums across National, National Trust and University museums spend, on average, 58% of total expenditure on staffing costs

Figure 19: Average expenditure on staff by museum type



In Figure 19 'Other' represents data provide by seven respondent museums which include four National museums, one National Trust property and two University museums. There are insufficient respondents to present this data across the three individual museum type.

Workforce

Paid Staff

93% (142) of respondent museums confirmed whether they employed staff. 70% (107) of museums employ 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 2018-19. 67% (102) of museums provided data on both these questions. 23% (35) of respondent museums do not employ any paid staff and operate with a wholly volunteer workforce. 94% (33) of these museums were Independent and all within the Small or Medium size category other than one which was a co-located museum site.

31% (47) of the respondent museums reported actual figures for paid staff, whilst the remaining 36% (55) reported that their figures were estimates.

- Museums employed 1667 paid staff based on 102 responses which equates to 991.79 FTE posts
- Museums employed an average of 16 staff and an average 9.72 FTE
- Independent museums (n.73) employ an average of 15 staff (8.87 FTE)
- Local Authority museums (n.19) employ an average of 12 staff (6.32 FTE)
- National museums (n.4) employ an average of 28 staff (19.69F TE)
- National Trust museums (n.3) employ an average of 53 staff (35.70 FTE)
- University museums (n.3) employ an average of 20 staff (12.87 FTE)

Employment impacts

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

- 60% of museums created 1479 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 three of the 143 museums providing data on the number of volunteers, reported that they did not operate with the support of volunteers. 78% (120) museums reported a total of 8,254 volunteers and an average of 69 volunteers per museum. Three museums reported volunteer numbers but not accompanying volunteer hours.

- 23% (35) of respondent museums reported that they are entirely volunteer run
- 76% (118) museums reported an average of 8,376 volunteer hours which equates to 5.1 FTE per museum
- The total number of volunteer hours recorded was 988,416 which equates to 599 FTE based on 1,650 hours worked per year.
- Volunteer hours are estimated to have contributed over £6,589,438 Million to museums. This value is based on a calculation of £50 per day using guidance issued by the National Heritage Lottery Fund.

Glossary and definitions

Deadweight
Value or impact that would have occurred without the museum

Direct effects
Actual jobs and spending created by a museum

Displacement
The proportion of museum value or impact accounted for by reduced value or impact elsewhere in the local area

Indirect and induced impacts
Supply chain linkages, and income multiplier effects on local employment and incomes created in local areas as a result of the activities of a museum.

Income
All sources of income received by the museum including all earned income through trading, fundraising and grants, donations and public subsidy.

Leakage
The proportion of value or impact that benefit those outside of the museum's local area

Volunteer impact calculation
The economic value of volunteer hours is applied using the Heritage Lottery Fund's (now National Heritage Lottery Fund) approach of £50 per volunteer day.

The calculation for the equivalent Full Time Equivalent (FTE) post for reported volunteer hours is based on a 37 hour week across the year.

'Known' and estimated data
In line with the 2018-22 National Portfolio Survey a change has been made to the previous term 'actual' to 'known' with the accompanying definition for sections of the survey relating to non financial data.

Known
E.g. Where you know the exact number of people attending.
These figures are an actual audience council, ticketed or counted by some other precise method.

Estimated
E.g. Where you do not know the exact number of people in attendance and you provide an estimate.

Bibliography

Association of Independent Museums (AIM), 2014, Economic impact calculation
This methodology was developed by DC Research from regional and national tourism datasets. Further information can be found online
https://www.aim-museums.co.uk/resources/toolkits/

Annual Survey of Visits to Visitor Attractions 2017, Visit England
https://www.visitbritain.org/annual-survey-visits-visitor-attractions-latest-results

South East Museum Development support

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

We regularly receive support and advice, in particular about conservation, funding, and accreditation queries. We also received a Level Up Development Grant and a Skills Builder CPD grant. As we only have one member of collections staff we are very grateful for the help and advice of the SEMDP. The curator has also received Preventative Conservation advice.

Chiddingstone Castle

I attended a training day at Brighton Pavilion in January. It was very useful and good to meet people from other museums in the South East

Arundel Museum

[The support from SEMD is] very helpful, keep up to date with guidelines and update Action Plan, etc..

Buckinghamshire Railway Centre

…can't do without it!!!

Cranbrook Museum

[SEMD] SEWS were hugely supportive to us when we were developing the Family Trails they funded. We found them very flexible and easy to approach, allowing us to achieve the best possible outcomes for our project.

Ditchling Museum of Art & Craft

What's new in accreditation session was excellent and gave a really good idea of what we need to build on

Dorchester Abbey Museum

[We] attended a study day about working with volunteers, which was informative and very useful

Fordingbridge Museum

We receive continual support from SEMDP

Hastings Fishermen's Museum

[..] a visit from [the technical Accreditation Advisor] was really helpful particularly as a new Curator entering from a heritage organisation its been a great welcome into the museum network here in the south east. I plan to keep attending SEMDP sessions and the SEWS leaders group.

Littlehampton Museum

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

Paralympic Heritage Centre

Always responsive, friendly and available

Royal Military Police Museum

We participated in the Museum MOT process which has been absolutely invaluable. We have received support in areas to improve and training. This led us to acquiring a Level Up Grant which we are currently using to get a consultant in which will help us to develop our audience and also led us to being successful with the Prospering Boards. All of the above is helping us to become sustainable and resilient and will pave the way for the next stages of the museum.

Rural Life Centre

Extremely supportive, friendly and helpful. The SEMDP is essential to a museum such as ours. We plan to keep attending their workshops and events to assist out learning and development.

The Diving Museum

South East Museum DEVELOPMENT PROGRAMME

With thanks to the following museums for participating

Aldershot Military Museum
Allen Gallery
Amberley Museum & Heritage Centre
Amersham Museum
Andover Museum
Anne of Cleves House Museum
Arundel Museum
Ash Museum
Ashford Borough Museum
Barbican House Museum
Basing House
Bate Collection of Musical Instruments, University of Oxford
Battle Museum of Local History
Beaney Art Museum and Library
Berkshire Medical Heritage Centre Museum
Bishop's Waltham Museum
Bletchley Park
Bloxham Village Museum
Bluebell Railway Museum
Booth Museum of Natural History
Bourne Hall Museum
Brading Roman Villa
Brighton Museum and Art Gallery
Buckingham Old Gaol Museum
Buckinghamshire Military Museum
Buckinghamshire Railway Centre
Bursledon Windmill
Carisbrooke Castle Museum
Chartwell
Chiddingstone Castle
Chilcomb House
Chiltern Open Air Museum
Classic Boat Museum and Gallery
Cowes Maritime Museum
Crafts Study Centre
Cranbrook Museum
Curtis Museum
Deal Maritime & Local History Museum
Didcot Railway Centre
Dimbola Museum and Galleries
Dinosaur Isle
Ditchling Museum of Art & Craft
Dorchester Abbey Museum
Dover Museum and Bronze Age Boat Gallery
East Grinstead Museum
East Surrey Museum
Eastleigh Museum
Eden Valley Museum
Egham Museum
Emsworth Museum
Explosion! The Museum of Naval Firepower
FAST Museum
Fishbourne Roman Palace
Folkestone Museum
Fordingbridge Museum
Gosport Discovery Centre
Guildhall Museum, Rochester
Haslemere Educational Museum
Hastings Fishermen’s Museum
Hastings Museum and Art Gallery
Henfield Museum
HMS Warrior 1860
Hove Museum and Art Gallery
Hughenden Manor
Jane Austen’s House
Kent and Sharpshooters Yeomanry Museum
Kent Museum of Freemasonry
Littlehampton Museum
Maidenhead Heritage Centre
Marlipins Museum
Mary Rose Ship Hall and Museum
Michelham Priory
Milestones Hampshire’s Living History Museum
Museum of English Rural Life
Museum of The Iron Age
Museums Resource Centre Oxfordshire
National Motor Museum
New Forest Centre
Newport Roman Villa
Nymans
Osborne House
Oxford Bus Museum
Oxfordshire Museum
Paralympic Heritage Centre
Pendon Museum of Miniature Transport and Landscape
Petersfield Museum
Petworth House and Park
Pitstone Green Museum
Powell Cotton Museum, Quex House and Gardens
Preston Manor
Priest House
PWRR and Queen's Museum
Quebec House
Red House Museum and Garden
Ripley Museum
Rockbourne Roman Villa
Royal Army Physical Training Corps Museum
Royal Green Jackets (Rifles) Museum
Royal Military Police Museum
Royal Navy Submarine Museum
Royal Pavilion
Rural Life Centre
Rustington Museum
Rye Castle Museum (East Street)
Sandwich Guildhall Museum
SeaCity Museum
Seaford Museum and Heritage Centre
Soldiers of Oxfordshire Museum
Southampton City Art Gallery
St Barbe Museum
Steyning Museum
Swalcliffe Barn
Tangmere Military Aviation Museum
Tenterden and District Museum
The Brickworks Museum, Bursledon
The Cole Museum of Zoology
The Cowper and Newton Museum
The Diving Museum
The Guardroom Museum (Adjutant General's 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
The Novium Chichester
The RAF Manston Spitfire and Hurricane Memorial Museum
The Rifles Collection
The Roald Dahl Museum and Story Centre
The Royal Engineers Museum
The Royal Hampshire Regiment Museum
The Royal Logistics 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
Ure Museum of Greek Archaeology
Vale & Downland Museum
Ventnor & District Local History Society
Watts Gallery
West Berkshire Museum
Westbury Manor Museum
Westgate Museum
Whitchurch Silk Mill
Whitstable Community Museum and Art Gallery
Willis Museum
Winchelsea Court Hall Museum
Winchester City Museum
Windsor and Royal Borough Museum
Witney Museum and Historical Society
Worthing Museum & Art Gallery
Wycombe Museum

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South East Museum
DEVELOPMENT PROGRAMME

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