South West Museum Development Programme

Annual survey of museums 2016/17

south west museum development programme

Contents

visits to museums
7,602,274

11,816
activities and events

985,063
volunteer hours

7,836
learning and outreach activities

349,511
participants to activities and events

participants of learning and outreach activities
204,036

10,227
active volunteers

29%
of museums were entirely volunteer-run

This information is representative of 79% (168) of Accredited museums in the South West of England region.

Summary of findings

The South West is a special place. The region welcomes large numbers of visitors each year who are drawn to the spectacular natural and cultural heritage. The South West is the largest tourism market outside London and the South East and Visit England data estimates South West tourism is worth £10.6 billion to the UK economy. Museums make a significant contribution to both tourism and local communities in defining the distinctness of place alongside shaping stronger communities.

The South West is also the largest ONS region geographically in England; the distance from Penzance in the far west to Tewkesbury in the north of the region is equal to the distance between Tewkesbury and the Scottish borders. As of November 2017 there were 212 museums in the South West within the Accreditation scheme, which is 14% of all Accredited museums in England.

Response rate

- 79% (168) of Accredited museums in the region responded to the SWMD Annual Museums Survey.

Audiences

- There were a total of 7,602,274 visits to museums in 2016/17 based on responses received.
- Museums held 11,816 activities and events that engaged 349,511 participants.

Economic impact

- Visits to museums represented around £92,723,739 million of gross visitor impacts.*
- There was at least £39,408,364 of direct, indirect and induced impacts as a result of spend on goods and services by museums.*
- At least 1,250 Full-Time Equivalent (FTE) direct, indirect and induced jobs were supported by museums.*

Online engagement

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

Educational engagement

- Museums delivered 7,836 learning and outreach activities engaging 204,036 participants.

Financial operations

- £62,729,559 was generated by museums in earned income (including admissions, retail, catering, events, hospitality, educational and other earned income from trading, e.g. property rental).
- £9,110,348 received in regular public funding (including Arts Council England Major Partner Museum/National Portfolio funding).
- £5,995,696 received in grant funding.
- £7,112,463 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

- 10,227 active volunteers in 2016/17.
- Ranging from 1 to 498 volunteers per museum.
- Volunteers contributed a total of 985,063 hours to museums in the region.

Workforce – paid staff

- Museums employed 1,588 paid staff equating to 856 Full-Time Equivalents.
- 29% of respondent museums were entirely volunteer-run with no paid staff.

* *Further information on the economic impact calculators is shown on pages 14 and 15 of this report.*

Introduction

This report presents the findings of the fourth South West Museum Development (SWMD) 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 being used to analyse and report on trends over time.

Findings from the data can contribute to estimates of the social and economic impact of museums and also help inform how South West Museum Development, and other participant museum development providers, deliver support to 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 SWMD, who are also commissioned to deliver the survey for other museum development providers with the intention of providing consistent data capture across multiple regions to enable more effective advocacy and benchmarking.

The 2016/17 survey followed the same format as surveys developed since 2012/13. 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's annual survey of Major Partner Museums and National Portfolio Organisations.

Survey method

The survey was sent to all 212 museums in the South West who are fully Accredited, provisionally Accredited or formally Working Towards Accreditation, as well as being promoted via the SWMD 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.

The survey asks museums to provide data for the 2016/17 financial year, or to indicate whether they are providing data from a different financial year, e.g. calendar year. 43% (93) of museums reported data for 1st April 2016 – 31st March 2017.

The survey was divided into four sections:

- Audiences
- Educational engagement
- Financial operations
- Workforce

Multi-site organisations were given the option to either provide a response as a whole organisation or by individual site. One multi-site museum service provider submitted a response with data provided at a whole organisation level; how this data has been incorporated into the report is highlighted on the following page.

Sample and response

79% (168) of museums within the Accreditation scheme responded to the survey in 2016/17. There are 212 Accredited museums in the region (as of November 2017, the date of the most recent Accreditation panel) of which 13 are formally Working Towards Accreditation. The 79% response rate is broadly representative of the region in terms of geography and the different types of museums.

Not all respondents provided data representing a single Accredited site either due to joint location of Accredited collections or multi-Accredited sites operating within a single organisation. Two respondent museums to the survey house separate Accredited collections within their building. As it has not been possible to allocate data per Accredited site the data has been aggregated into a single return. However, the museum is included within the overall number of Accredited museums in the region (i.e. 212).

One multi-site museum service provider returned one survey which represented all of its five Accredited sites. The data for this return has been divided equally across the five sites. As such the figures have been changed from 'Actuals' to 'Estimates' to reflect this intervention.

One further museum sits within a National Trust site which is also part-owned and part-governed by English Heritage. This report lists the museum as National Trust and is included as such in any calculations that look at museums in the South West by type. This listing is in line with Arts Council's *List of Accredited Museums in the United Kingdom, Channel Islands and the Isle of Man, November 2017.*

Finally, this report refers to the West of England throughout. This is a sub regional area within which SWMD operates and includes Swindon, Bath and North East Somerset, Bristol and South Gloucestershire.

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

- Not all museums responded to every question.
- Percentages have been rounded up to the nearest whole number.
- 'Respondents' or 'Museums' is every museum who submitted a response.
- In some sections of the survey the 100% is based on the number of respondents to a particular section of the survey rather than the overall percentage return rate (e.g. 79% (168).
- When data is being considered in relation to museum charging models, 'charging for some exhibitions/seasonally' is included within the bracket of 'charged admission'.
- 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 which 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

A full list of 2016/17 respondent museums is included at the end of this report.

Of the 79% (168) museums that responded to the survey, National (DCMS sponsored) museums and English Heritage are not represented in the sample; although they are small in number relative to other types of museums in the region, they still have an impact on the state of the regional sector and the regional economy.

Museum opening arrangements

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

- 40% (68) reported that they were open all year round.
- 51% (86) reported that they were closed part of the year as regular seasonal closure.
- 1% (2) of museums open by appointment only all year round.
- 4% (8) of museums were closed for the year/part of the year for redevelopment, refurbishment and/or repair.

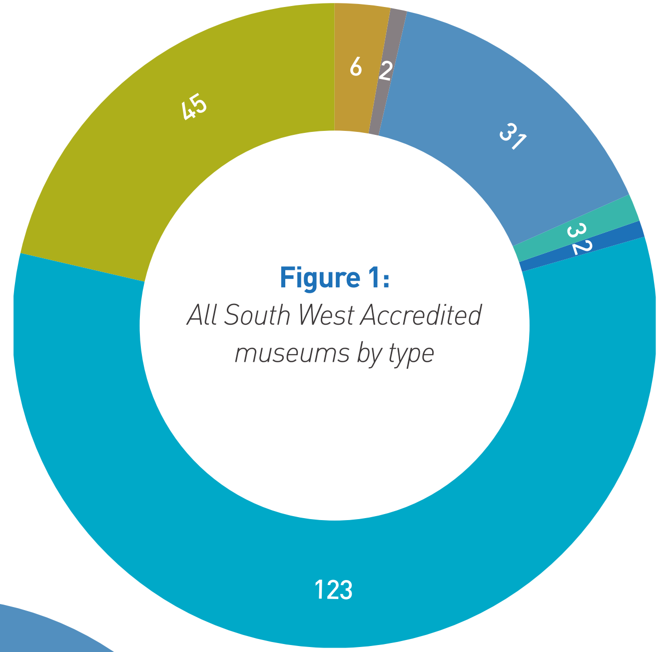


Figure 1: *All South West Accredited museums by type*

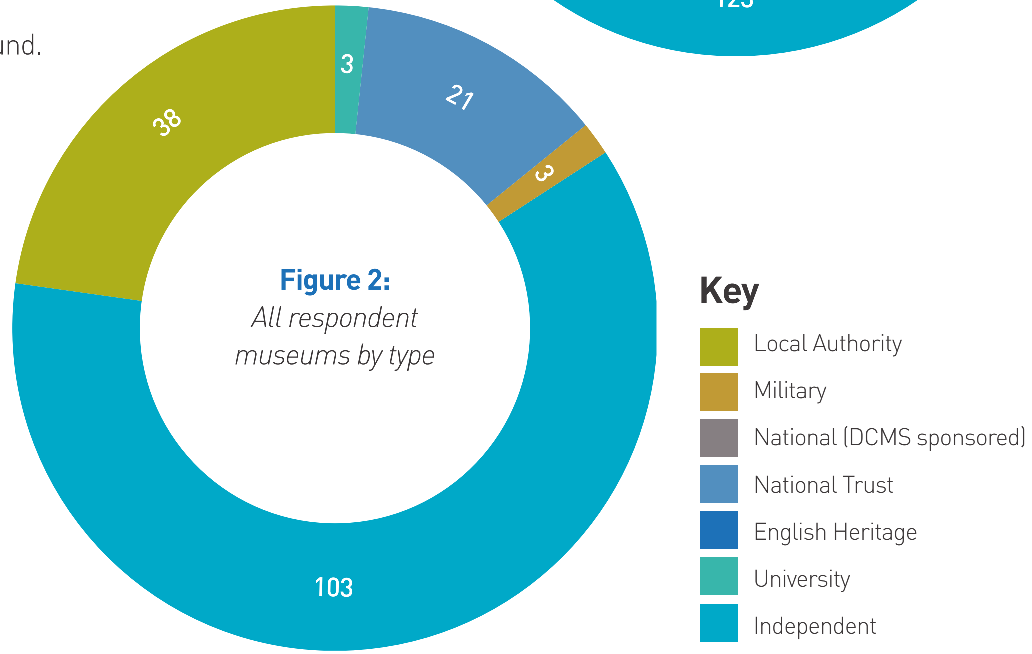


Figure 2: *All respondent museums by type*

Respondents by size

Museums in the South West range from small, community museums in coastal and rural areas to large inner-city museums and galleries. The size of a museum has been determined by its visit figures in 2016/17. Figure 4 shows that the highest response rate came from those museums with visit figures at 9,999 and under which is broadly reflective of the size of museums in the region.

Geographic distribution

In Figure 3 where a sub-region is marked with an asterisk museums classed as formally Working Towards Accreditation (WTA) have been included in the overall number of Accredited museums. The number in brackets in each of these regions indicates the number of WTA museums who responded to the survey.

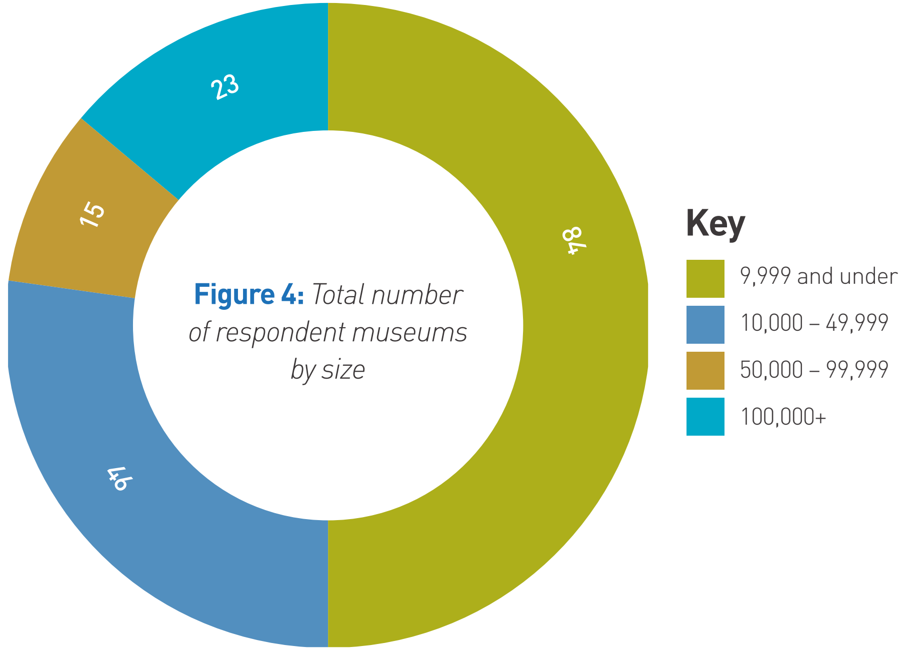
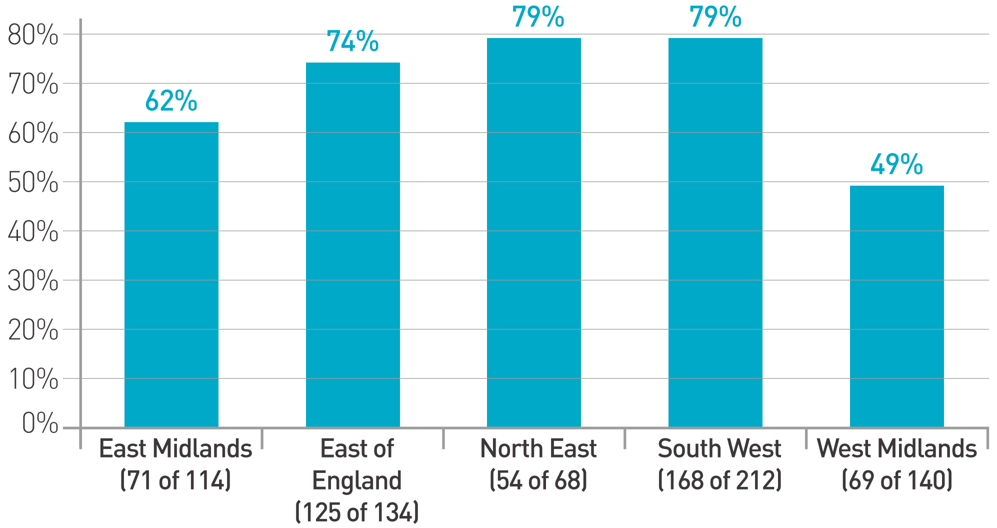


Figure 4: *Total number of respondent museums by size*

Figure 3: *Total number of respondent museums by sub-region with percentage return rate*

Sub region	No. of respondents/ no. of Accredited museums	Percentage return rate
Cornwall	24 of 34	70%
Devon	42 of 50* (4)	84%
Dorset	22 of 27* (1)	81%
Gloucestershire	16 of 23* (1)	69%
Somerset	17 of 23* (1)	73%
West of England	33 of 35	94%
Wiltshire	14 of 20* (1)	70%

Figure 5: *Response rate as percentage for South West and other regions who surveyed museums in 2016/17*



1

Audiences

Audiences

Total visit figures

A total of 7,602,274 visits to museums were made in 2016/17 based on the responses received. Visit figures in the data are heavily influenced by a number of large museums with 100,000+ visitors per annum. As a result these 22 large museums account for 63% of all visits. One museum did not report their visit figures for 2016/17, however, publicly available data for visits to museums suggest that they received an estimated additional 233,385 visits, which is based on the *Visit England Annual Survey of Visits to Visitor Attractions in England 2016* report. This would take the total number of visits to museums in the South West to 7,835,659.

95% (161) of respondent museums confirmed whether the visit numbers provided were actuals or estimates, with 72% (122) providing actual figures and 25% (42) providing estimates.

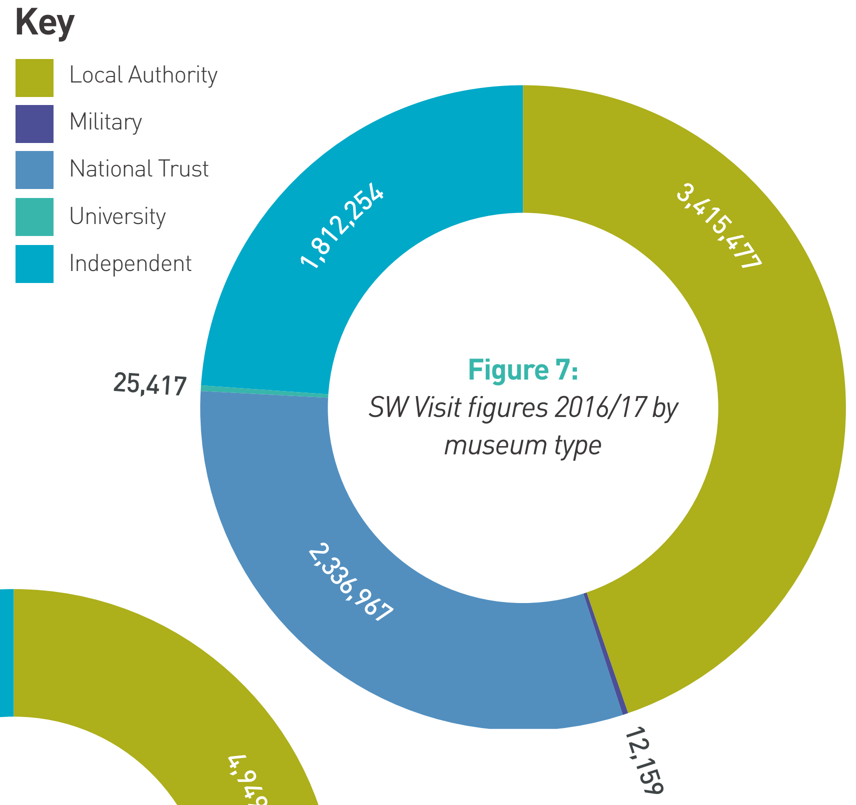


Figure 7: *SW Visit figures 2016/17 by museum type*

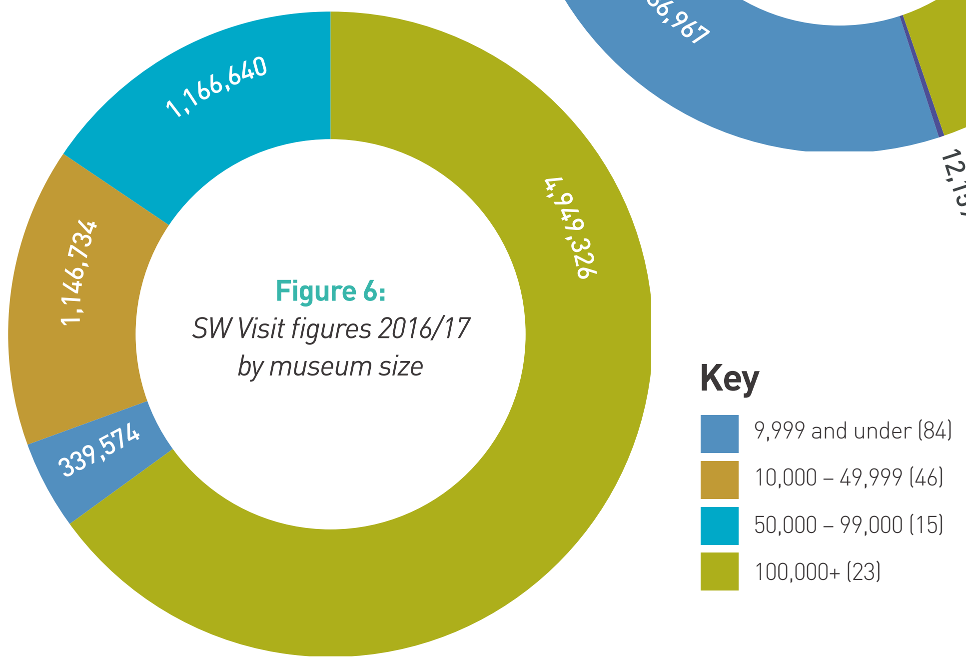


Figure 6: *SW Visit figures 2016/17 by museum size*

Museum opening hours

Museums reported opening hours as follows:

- 84% (142) of museums reported opening hours which totalled 198,163 in 2016/17.
- Opening hours range between 74 and 3,456 (per annum).

Visit figures by sub-region

Figure 8 details the breakdown of visits per sub-region. The West of England received the highest number of visitors in 2016/17 by almost 1.7 million. This is because the museum that received the highest number of visitors in the South West in 2016/17 (1,123,633) is ranked within the top fifteen most visited paid for attractions in the UK. Out of the twenty-three museums with 100,000+ visits per annum, 43% (10) were located in the West of England.

Visits by children

80% (136) of respondent museums provided a breakdown of visits into adults and children (under 16). 46% (76) of respondents reported actual figures, whilst 44% (60) reported estimates.

1,342,816 visits by children to museums were reported in 2016/17. Based on these responses, children accounted for 18% of all visits. Museums with 100,000+ visits per annum reported the highest percentage of visits by children in the South West.

Figure 8: *Visit figures 2016/17 by sub-region*

Sub region	Total visits 2016/17	Percentage of total regional visit figures
Cornwall	724,847	9%
Devon	1,513,184	20%
Dorset	490,692	6%
Gloucestershire	471,358	6%
Somerset	655,112	8%
West of England	3,218,331	43%
Wiltshire	528,750	7%

Figure 9: *Child visits 2016/17 by museum size*

Museum size	Total visits by children	Sample	Percentage of total visit figures by size
9,999 and under	52,560	72 of 84	15%
10,000 – 49,999	197,206	40 of 46	17%
50,000 – 99,999	143,034	9 of 15	12%
100,000+	950,016	15 of 23	19%

Economic impact of visits

Museums make an important contribution to the regional economy, generating a range of financial and societal benefits, and particularly helping to attract tourism. In 2017 twelve of the top twenty most visited free attractions, and ten of the top twenty paid for attractions in the South West were museums and historic properties, and fifteen of these attractions are Accredited museums.*

In order to estimate the economic impact of visits to museums, the Association of Independent Museums (AIM) visitor spend calculator has 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. 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. 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.

Figure 10 details AIM's assumed visitor spend per sub-region as published in the Economic Impact Toolkit in 2014. The areas classified by SWMD as West of England are broken down separately here by AIM, with the exception of Swindon which has been included with Wiltshire, the county in which it sits. These distinctions have been applied to the calculations expressed here.

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

Using this toolkit the gross visitor impact was £92,723,739 in the South West economy based on the visit data provided by museums:

- There was a reported £31,301,227 in 'Local 'visitor spend in 2016/17
- There was a reported £61,422,512 in 'Day' visitor spend in 2016/17

Figure 10: *AIM Economic Impact Toolkit assumed 'Local' and 'Day' visitor spend by sub-region*

Sub region	'Local' visitor assumed spend	'Day' visitor assumed spend
Bristol/Bath area	£15.79	£31.57
Cornwall and Isles of Scilly	£17.88	£35.76
Devon	£14.80	£29.60
Dorset	£21.72	£43.45
Gloucestershire	£25.59	£51.18
Somerset	£18.70	£37.39
South Gloucestershire	£12.13	£24.25
Wiltshire	£12.74	£25.49

*Footnote: according to Visit England's Annual Survey of Visits to Visitor Attractions in England 2016. Top twenty most visited free attractions in the South West:
https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/most_visited_free_sw_2016.pdf

*Footnote: top twenty most visited paid for attractions in the South West:
https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/most_visited_paid_sw_2016.pdf

Economic impact calculation

- This calculation takes the number of adult visits to a museum, establishes the proportion of 'Local' and 'Day' visits and multiplies these by average visitor spend assumptions developed by DC Research from regional and national tourism datasets.
- Total adjusted adult visits is estimated to be 5,650,874, based on the adult/child ratio of 80/20 for museums with 9,999 visits and under; 80/20 also for museums with 10,000 – 49,999 visits; 77/23 for 50,000 – 99,999 visits; and 72/28 for museums with 100,000+ visits per annum.
- Actual ratios for 'Local' and 'Day' visits were not available from museums so the average ratios developed by DC Research have been used. No data for overnight visits was available so visits have been divided into 'Local' and 'Day' visits only. 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.

Case study

Highlights: Priest's House Museum, Dorset

On Saturday mornings there is always a bit of drama at the Priest's House Museum in Dorset. Yet this is not just drama for drama's sake, this is original storytelling, performance and drama workshops that bring a slice of theatre and creativity to proceedings at the museum. Since 2014 the museum has been host to Millstream Theatre, an adult company of actors with learning disabilities from Wimborne Minster and surrounding areas in East Dorset. The group is co-ordinated by local theatre companies, Persuasion Arts and State of Play Arts, in partnership with the Priest's House Museum Trust, and aims to create high-quality storytelling events and activities for the museum's visitors. Using the experiences of the participants, and providing them with new opportunities to engage with local history and culture, the group creates stories and productions using the museum's galleries and collection as their stimulus.

Productions use a mix of drama, movement and film and are devised by the group over a six month period, often working in collaboration with or under the tutorship of professional guest artists and practitioners. The success of Millstream Theatre and its workshops has had a really positive impact on its participants, with many involved gaining new skills and abilities, and feeling as though they themselves are becoming part of the museum's history. The talents and achievements of the group have been showcased each year as part of Wimborne's 'Sting in the Tale' festival. The festival, which has been held each August since 2003, aims to build public appreciation of the traditional art form of storytelling and the productions developed by Millstream are a key event in the festival calendar and enjoyed by a wide variety of local audiences. The work of Millstream is part funded by Arts Council England, the Rotary Club and East Dorset District Council.

Online engagement

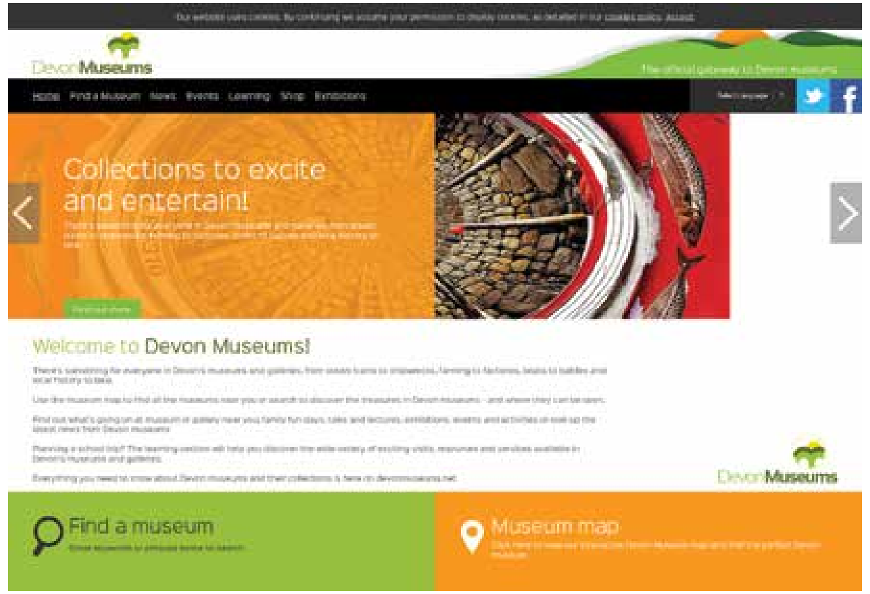
Advances in digital technology offer museums great opportunities for new forms of engagement beyond the physical visit. This survey captures information on museums' online and social media presence.

Websites

85% (143) of respondent museums have their own website. Whilst 8% (15) of museums reported that they did not have their own website, a number are featured on their town's or county museum network's website e.g. Devon Museums or Cornwall Museums.

Devon Museums website:
www.devonmuseums.net

Cornwall Museums website:
www.museumsincornwall.org.uk



The National Trust sites who reported that they did not have their own websites are all either donor-occupied/administered properties, or separate museums located within a larger Trust property. They also all have an online presence via the National Trust's own website or via pages related to their parent property, which suggests the individual respondent to the survey may not have administrative access to their museum's web pages.

51% (86) of respondents to this section of the survey provided data on the number of unique visits to their websites reporting an estimated total of 5,772,186 unique visits in 2016/17.

Social media

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

85% (143) of museums stated that they used social media to engage with audiences with platforms including Facebook, Twitter and Instagram most frequently cited, and an estimated 459,036 subscribers or followers.

Visit England's *Annual Survey of Visits to Visitor Attractions in England 2016* report showed that Facebook and Twitter continue to be the two main social media platforms, reporting that 82% of attractions they surveyed use Facebook and 68% use Twitter to engage with their online audiences.

Of the 8% (15) of museums who stated that they did not use social media, 53% (8) of these museums did report that they had their own website. Just under half of the museums 46% (7) reported that they do not use either their own social media or their own webpages.

Education, activities and events

Learning and education are important functions of all museums. These learning and educational activities are delivered in a wide variety of ways depending on the museum in terms of their physical space, their collections, the partnerships they engage in and the skills and experience of paid staff and volunteers.

Figure 11 details the number of educational outreach/off-site sessions delivered by museums in 2016/17 along with the number of participants engaged.

Museums in the South West were asked to report the number of different schools and formal learning organisations they engaged with in 2016/17. 69% (116) reported an estimated total of 3,247, which ranged from 1 to 300 per museum.

72% (121) of respondents provided information on the number of on-site educational sessions, and 73% (123) provided information on on-site activities and events. However, it is worth noting that existing recording varied slightly between capturing participants and events as not all museums captured both.

Figure 11: *Educational sessions in the South West*

	Total	Sample
Number of on-site sessions in the SW	6,494	121 of 168
Number of participants	165,999	122 of 168
Number of off-site sessions in the SW	1,342	80 of 168
Number of participants	38,037	79 of 168

Figure 12: *Activities and events in the South West*

	Total	Sample
Number of on-site sessions in the SW	10,096	123 of 168
Number of participants	215,619	126 of 168
Number of off-site sessions in the SW	1,720	110 of 168
Number of participants	133,892	111 of 168

Case study

Highlights: Glastonbury Abbey, Somerset

The improvement of family offers was a big part of Glastonbury Abbey's strategy for 2016/17. They introduced 'Friday Family Fun Sessions', which saw the learning team host activities for children and their families. These activities included storytelling sessions and craft workshops, and often used natural resources from the site and its gardens to further engage family visitors with its medieval, monastic and mythical history. Visitors could make a twig loom or lavender favours, leaf crowns or clay tiles.

The number of sessions grew from six in 2016 to forty-eight in 2017, with the team also running theatre workshops for families in the school holidays. The interactive nature of these sessions drew a number of participants from families who had special needs, or for whom English is not their first language, but it wasn't just children and families for whom the Abbey sought to develop learning opportunities.

The team also embarked on developing courses for adult learners as part of a project to create a medieval-style kitchen garden. The project, which also conserved and re-interpreted the 14th century Abbot's kitchen, enabled participants to learn more about the relationship between medieval horticulture and cookery by helping with the construction of the garden. Participants learnt traditional crafts and skills and helped develop new interpretation panels for visitors.

These hands-on courses were funded by Somerset Skills and Learning, as part of their community learning partnership, and were attended by residents from the local YMCA, unemployed members of the community and adults with learning difficulties or disabilities, many of whom are now active volunteers at the Abbey.

2 Financial operations

Financial operations

Museums were asked to provide a range of financial information covering sources of income, overall expenditure and expenditure on staff. This information was provided in varying degrees of completeness and there was some variation on the financial periods for which museums provided. 55% (93) of respondents offered financial data for the financial year 1st April 2016 – 31st March 2017; 14% (23) stated that their financial year runs the calendar year; 23% (39) operate under different financial terms such as the academic year; the remaining 9% (13) did not provide an answer to this question. 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 2016/17 was £62,729,068, which breaks down as follows:

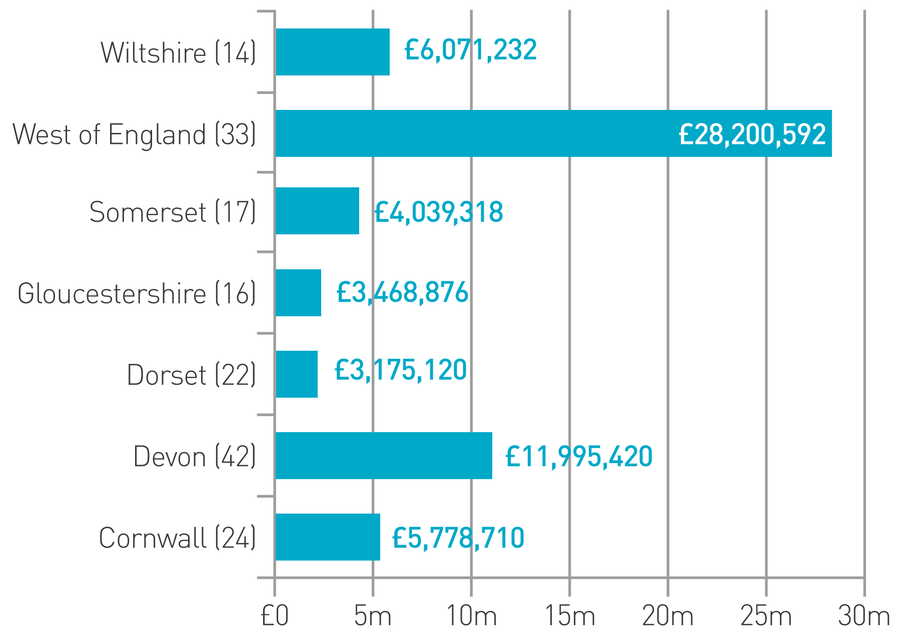
- £40,510,559 in earned income (including admissions, retail, catering, events, hospitality, educational and other earned income from trading, e.g. property rental).
- £9,110,348 received in regular public funding (including Arts Council Major Partner Museum or National Portfolio Organisation funding).
- £5,995,696 received in grant funding.
- £7,112,463 received in contributed income (including all money received in donations, friends/members schemes, any sponsorship income, corporate membership, or other non-earned income).

100% (168) of respondent museums provided information on some areas of their income in 2016/17. Figure 13 shows total income by sub-region.

Breakdown by museum size is as follows:

- £3,449,970 generated by museums with 9,999 or less visits per annum (84).
- £11,895,553 generated by museums with 10,000 – 49,999 visits per annum (46).
- £7,185,941 generated by museums with 50,000 – 99,999 visits per annum (15).
- £40,197,604 generated by museums with 100,000+ visits per annum (23).

Figure 13: *Total generated income by sub-region*



Breakdown of income

Figures 14,15 and 16 detail the breakdown of income by charging model per museum type, by museum type and by charging model.

It is important to note that museums who provided data on their income did not all answer the question on whether they charged for admission, hence the variation in numbers of responses shown within figures. In Figures 14 and 16 where museums reported that they charged admission seasonally or for some exhibitions, these have been categorised within overall charged admission.

Figure 14: *Total income by charging model per museum type*

	Breakdown of income for charged admission	Sample	Breakdown of income for free admission	Sample
Independent	£17,934,496	59	£1,931,418	42
Local Authority	£19,845,577	16	£5,040,607	19
Military	£251,877	2	£0	0
National Trust	£9,810,492	16	£0	0
University	£0	0	£183,250	3

Figure 15: *Total income by museum type*

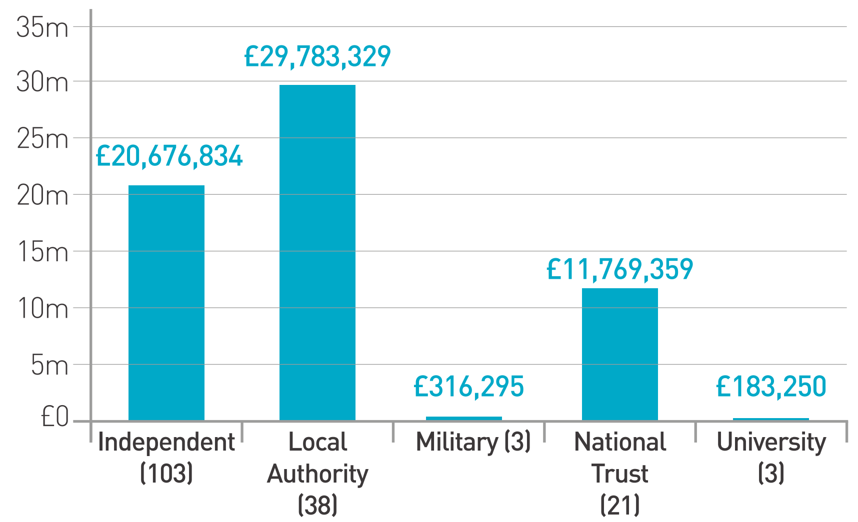
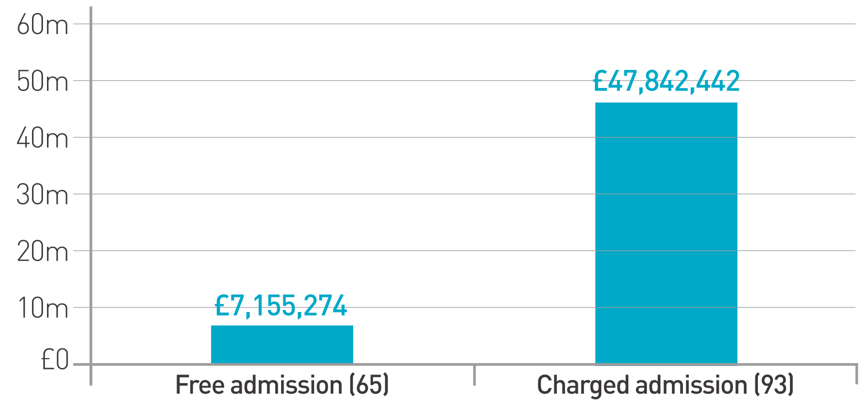


Figure 16: *Total income by charging model*



Admission charges

Museums were asked whether they charged for admission:

- 94% (158) of museums responded to this question.
- 53% (85) of these reported that they charged for admission as standard in 2016/17.
- 41% (65) offered free entry all year round.
- 5% (8) said that they charged seasonally/for some exhibitions.

51% (81) of the aforementioned 94% (158) of museums reported a total of £21,748,315 was generated in admissions income.

The admission charge for an adult ticket ranged between £1 and £17.60; the admission charge for a child ticket ranged between £0.50 and £9.80.

Figure 17 shows the average admission charges for museum by size. 55% (92) of museums provided information on their adult admission charges, and 38% (63) provided information on admission charges for children.

Figure 17: *Average adult admission charges by museum size*

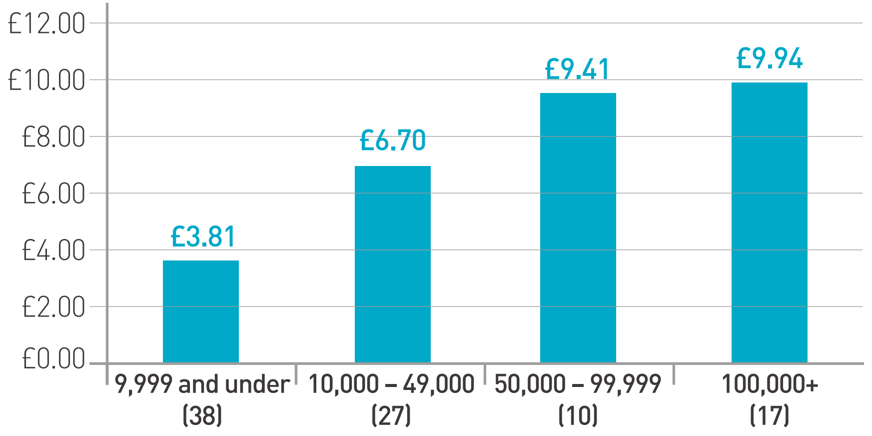
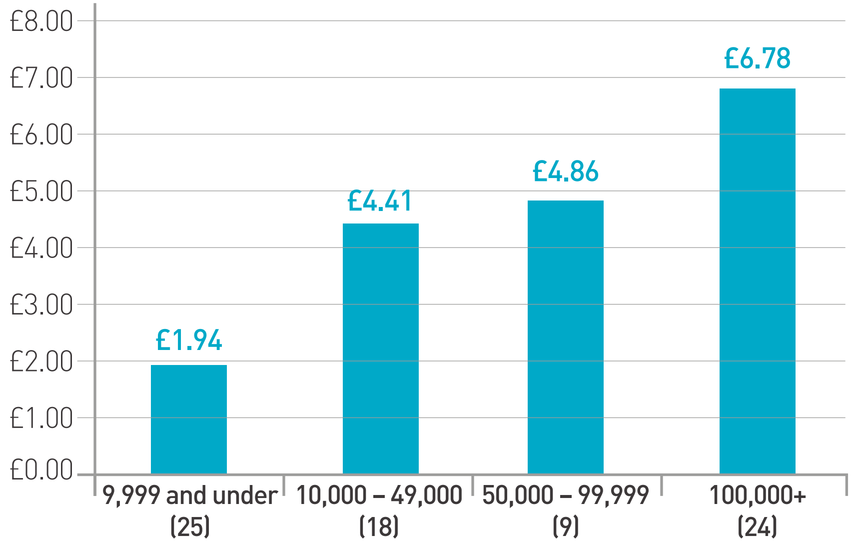


Figure 18: *Average child admission charges by museum size*



Retail income

As museums seek to diversify their funding sources, retail is an increasingly important source of generating income. Even if space is limited, the majority of museums have developed a retail offer. 79% (132) of the respondent museums in the South West have a shop or a retail space. 77% (130) of them reported retail revenue which totalled £5,674,171 for 2016/17.

To understand the effectiveness of their retail offer, museums can look to their retail spend per head figures, and the aforementioned 79% (132) provided sufficient detail for this to be measured. Figures 19 and 20 show the average spend per head by museum size and charging model.

Figure 19: *Average retail spend per head by museum size*

	Average	Lowest	Highest	Sample
9,999 and under	£0.69	£0.01	£2.30	69
10,000 – 49,999	£1.20	£0.01	£8.30	42
50,000 – 99,999	£0.70	£0.03	£2.10	15
100,000+	£1.10	£0.01	£6.60	19

Figure 20: *Average retail spend per head by charging model*

	Average	Lowest	Highest	Sample
Free admission	£1.20	£0.01	£8.30	83
Charged admission	£1.40	£0.01	£1.90	54

Catering income

Catering is often another important source of income for many museums, and a cup of tea or slice of cake at the end of a visit can really add value to many visitors' experiences at museums:

- 27% (45) had an in-house café/refreshment facilities.
- 14% (24) contracted out their café/refreshments.
- £6,074,136 was generated in catering income as reported by 35% (58) of museums in 2016/17.

Donations

For some museums, donations are the primary form of fundraising activity they undertake and are vitally important to their income.

South West Museum Development recognises the value of financial donations as a diverse funding source, and as such has supported museums to purchase donations boxes through the Small Grant Big Improvement scheme with the aim of encouraging effective income generation. There is a considerable body of sector guidance on donation boxes and creating effective strategies for maximising donations such as the AIM Guide on Donation Boxes.

www.aim-museums.co.uk/wp-content/uploads/2017/02/AIM-Quick-Guide-Donation-Boxes.pdf

Museums were asked to provide information on their donations in order to generate an average donation per head from the data. The method used for calculating donations income per head has been to divide total donations reported by total visitor numbers. The lowest value used for this calculation is £0.01. There was an 85% (143) response to this question with a reported total for donations at £2,133,080.

Similarly to retail, museums that charged admission show a higher per head income from donations than free entry museums, as can be seen in figure 22, although this may not be reflective of other factors that could influence the level of donations.

Not all museums in the 85% (143) who reported donation income stated whether or not they charged for admission, which is reflected in the sample sizes in Figure 22.

Figure 21: *Average donations spend per head by museum size*

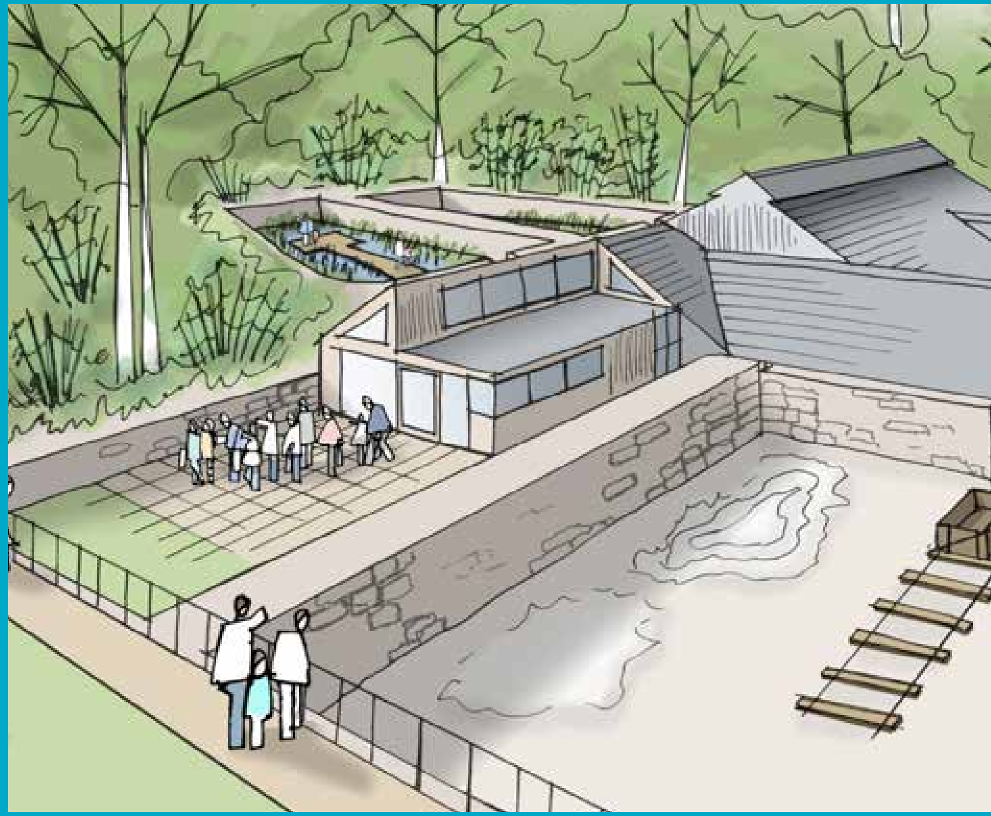
	Average	Lowest	Highest	Sample
9,999 and under	£1.40	£0.01	£23.80	72
10,000 – 49,999	£0.50	£0.01	£4.40	39
50,000 – 99,999	£0.40	£0.01	£3.40	13
100,000+	£0.40	£0.01	£3.80	19

Figure 22: *Average donations spend per head by charging model*

	Average	Lowest	Highest	Sample
Free admission	£0.80	£0.01	£9.10	57
Charged admission	£1.10	£0.01	£23.80	78

Case study

Highlights: Wheal Martyn Clay Works, Cornwall



Planning a capital works project on a Scheduled Monument is a huge challenge, but such a challenge was tackled head on thanks to a big team effort at Wheal Martyn Clay Works in Cornwall. With the support of Round 1 funding from the Heritage Lottery Fund, staff, volunteers, consultants and project management specialists contributed to plans for a new exhibition gallery and activity/learning space in an unoccupied building within the Victorian clay works. The planning phase for the 'Clay Works!' project began in April 2016 and provided the team with an opportunity to plan conservation works at Wheal Martyn, which had previously been highlighted as essential in their 2013 Conservation Management Plan.

It is audiences, however, that are at the heart of the 'Clay Works!' project; the museum's focus is on broadening its reach with the hope that it will enable the site to become more sustainable and deliver greater benefits to its neighbouring communities. Consultation was carried out with the museum's users and non-users; an access audit was undertaken to inform the implementation of accessible routes and facilities; and a four-year activity plan was created to develop programming aimed at attracting a wider range of people to the museum, as well as plans for targeted work with groups from lower socio-economic backgrounds and hard to reach groups who don't engage with museums or cultural organisations within St. Austell and the wider area.

Finally, an evaluation plan has been developed to deliver a programme of formative and summative evaluations to ensure that the experiences, opinions and needs of the people of Wheal Martyn past, present and future are not lost in this major ongoing development and re-interpretation project at this most important of sites in Cornwall's clay country.

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 use. 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 £39,408,364 of direct, indirect and induced impacts in the South West as a result of spending on goods and services by museums.

This calculation is based on museum expenditure figures, excluding staff spend, from 82% (137) 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.

This year 25% (42) of museums specified that they had received capital investment in 2016/17, totalling £3,798,995.

Expenditure and staff costs

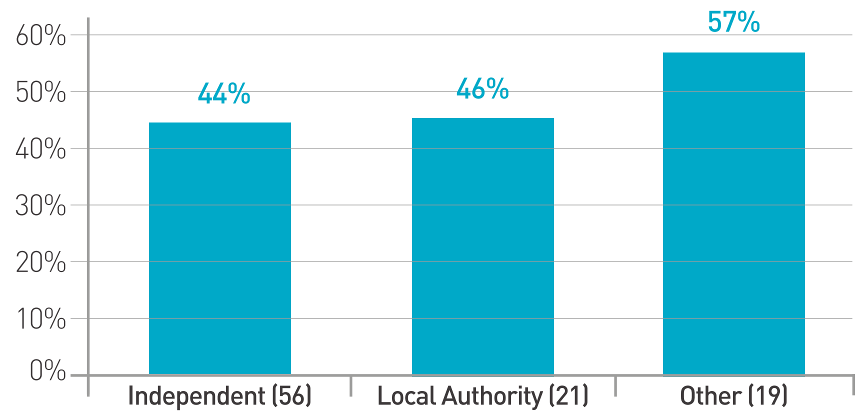
57% (96) of responses were received from museums and museum services that employ staff and provided both total expenditure and expenditure on staff costs. On average, spending on staff accounted for 47% of total expenditure, which breaks down as follows:

- 21% (20) of museums spent an average of between 3% – 10% of their total expenditure on staff costs.
- 11% (11) of museums spent an average of between 11% – 25%.
- 29% (28) of museums spent an average of between 26% – 45%.
- 32% (31) of museums spent an average of between 46% – 65%.
- 16% (15) of museums spent an average of between 66% – 79%.
- 4% (4) of museums spent an average of between 80% – 100%.

In Figure 23, 'Other' includes Military, National Trust and University museums. Whilst these museum types represent the smallest number of respondents to this part of the survey, collectively they show the highest average spend on staff costs. The percentages shown in Figure 23 for the South West are broadly reflective of average expenditure figures on staff costs by museum type nationally. However, it is worth noting, local authority museums do not include wider staff costs related to services provided centrally such as finance, HR, legal and IT support. Therefore it is reasonable to assume that the true cost of staffing as a percentage of total expenditure within local authority museums would be higher than reported.

There was a reported total of £22,689,015 expenditure on staff costs by museums in the South West in 2016/17.

Figure 23: *Average expenditure on staff by museum type as a percentage of total expenditure*



Case study

2016 saw the culmination of a five year task of conserving and returning the Iron Duke to Bradford-on-Avon Museum in Wiltshire. The Iron Duke is a calender machine designed to bind mixed rubber and is of great importance to the local community in Bradford-on-Avon because of its significance within the industrial heritage of the town. Bradford-on-Avon was the centre of the British rubber making industry for over 150 years and the Iron Duke operated in the town's factory where many of the museum's volunteers and visitors remember it, either through their own employment at the factory or through their relatives'. It was the first machine of its kind in the United Kingdom, built in 1848 and named after the Duke of Wellington, and some of its earliest products were footwear and waterproof capes for troops fighting in the Crimean War (1853 –1856). When it ceased working after 120 years the Iron Duke was taken to Bristol Museum and Art Gallery where it remained in storage until 2016.

The ambitious project to return the Duke to its Wiltshire home was undertaken in partnership with the Bradford-on-Avon Preservation Trust and Bradford-on-Avon Community Area Network. The museum, run entirely by volunteers, worked tirelessly to raise funds and return this important artefact to the museum. They were successful in receiving grants from the Heritage Lottery Fund and the Arts Council's Prism Fund, along with other contributions from a variety of benefactors. Alongside their fundraising the museum recruited a project management team, worked to find the right location for their new exhibit, and liaised and negotiated with Bristol Museum and Art Gallery, all of which took almost four years. Following this the process of conservation and installing the machine on-site took a further six months, so it was with no surprise that the unveiling of the Iron Duke in September 2016 was accompanied with great fanfare and celebrations that a huge part of the town's heritage had been restored.

Highlights: Bradford-on-Avon Museum, Wiltshire

3 Workforce

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 2016/17. 57% (96) of museums provided data on both these questions which has been included within the findings detailed below:

- Museums employed 1,588 paid staff.
- Museums employed 856 FTEs.
- 80% (77) of the sample museums reported actual figures for paid staff, whilst the remaining 21% (21) reported that their figures were estimates.
- 70% (67) of the sample museums employ between 1 – 15 members of paid staff, based on figures provided for total head count.
- 17% (16) reported that they employed between 16 – 30 members of paid staff.
- 13% (12) reported that they employed between 31 – 90 members of paid staff.
- 3% (3) reported that they employed 90+ members of paid staff, with two thirds of these employing over 100 staff, the highest figure being 141 paid members of staff.

Employment impacts

Using the AIM Economic Impact Toolkit we can estimate the value of museum employees within 57% of the sector to the South West regional economy:

- These museums created 1,250 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; their involvement makes a huge difference to museums and encompasses everything from enhancing the visitor experience, caring for and documenting the collections, business planning and managing finance. Many museums also rely on voluntary trustees to help guide the governance of a museum and ensure they are sustainable in challenging times.

89% (150) of museums provided data on their volunteer workforce which is detailed below:

- Museums reported a total of 10,227 volunteers.
- This ranged from 1 to 498 volunteers per museum.
- 29% (44) of the museums reported that they are entirely volunteer run.
- 1% (2) reported that they did not have any volunteers within their workforce.
- The total number of volunteer hours recorded was 985,063, reported by 96% (144) of the sample museums.
- 36% (54) of sample museums reported actual figures whilst 67% (101) reported that their figures were estimates.
- It could be assumed that the higher proportion of estimated figures relates to the question on volunteer hours, which may be difficult for museums to accurately record.

4

Comparison Data

Comparative data

Data has been collected by SWMD through the Annual Survey of Museums since 2012/13. Data over four years, starting at 2013/14, can be used as indicators of change over time. In line with the SWMD public funding the survey has been targeted at Accredited museums within the ONS South West region. Since 2012/13 the number of Accredited museums (including those assessed by Arts Council as eligible for Working Towards Accreditation) within the region has increased from 187 to 212 in 2017.

In 2012/13 142 Accredited museums responded to the inaugural SWMD survey, and responses in subsequent years were as follows:

- 2013/14 135 Accredited museums
- 2014/15 138 Accredited museums
- 2015/16 130 Accredited museums
- 2016/17 168 Accredited museums

Data collected in the first year provided a helpful baseline for individual museums but has not been used within the presentation of comparative data in this report. The data collection pilot generated small sample sizes and a variation in the completeness of returns. As a result of the pilot questions were revised for the subsequent four years.

In addition to presenting the Annual Survey of Museums data for 2016/17 this section of the report looks back at the previous four years across a group of museums which completed questions in each year. Data has been analysed from three key areas of the survey: audiences, financial operations and workforce. In order to generate the largest possible sample group each area of the survey is considered independently.

Figure 24: *Respondents by museum size across four years*

	2013/14	2014/15	2015/16	2016/17
9,999 and under	74	73	66	84
10,000 – 49,999	26	37	37	46
50,000 – 99,999	21	16	13	15
100,000+	14	12	14	23
Total	135	138	130	168

Audiences

The following data on visit figures was drawn from a sample of 42% (70) of museums which responded to the SWMD survey in each of the four years and provided their figures for total visits:

Visits to these 42% (70) museums across the four years:

- Total visits 2013/14 – 2,672,918
- Total visits 2014/15 – 2,733,000
- Total visits 2015/16 – 2,979,920
- Total visits 2016/17 – 2,890,033

Visits have remained relatively steady year-on-year:

- Between 2013/14 and 2014/15 visits increased by 2%
- Between 2014/15 and 2015/16 visits increased by 9%
- Between 2015/16 and 2016/17 decreased by 3%

Although visit figures reported by these museums have decreased this year they are still 8% higher overall than those first reported in 2013/14.

The impact calculations for 'Local' and 'Day' visitor assumed spend have been applied to results from 2015/16 and 2016/17 as these calculators have only been developed since 2014.

Figure 25: *Total visit figures and sample museum visit figures over four years, with sample museum visit figures as percentage of total visits for comparison*

	Total visit figures	Sample museum visit figures	Sample museum visit figures as % of total visit figures
2013/14	7,679,999 (135)	2,672,918 (70)	34%
2014/15	5,174,416 (138)	2,733,000 (70)	52%
2015/16	5,944,099 (130)	2,979,920 (70)	50%
2016/17	7,602,274 (168)	2,890,033 (70)	38%

2015/16

'local' visitor impact was **£13,298,575**

'day' visitor impact was **£51,910,507**

gross visitor impact was £65,209,082

2016/17

'local' visitor impact was **£12,278,659**

'day' visitor impact was **£37,956,492**

gross visitor impact was £50,235,151

Financial operations

Comparative data on financial operations from 2013 – 2017 of the SWMD survey has been taken from a sample of 35% (59) museums which reported on their financial income and expenditure in all four years. A reported total of £119,700,034 was generated in income by these museums over the four years.

Questions relating to the breakdown of income were introduced in later surveys to align with national public funding reporting in 2015/16. Museums have been asked to provide figures for their expenditure, which are considered in comparison to their reported income.

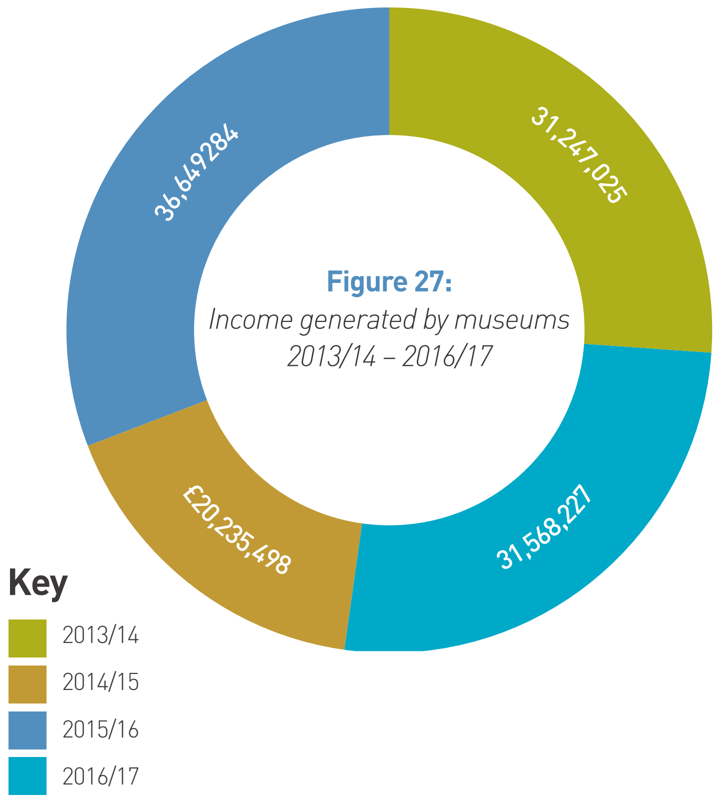
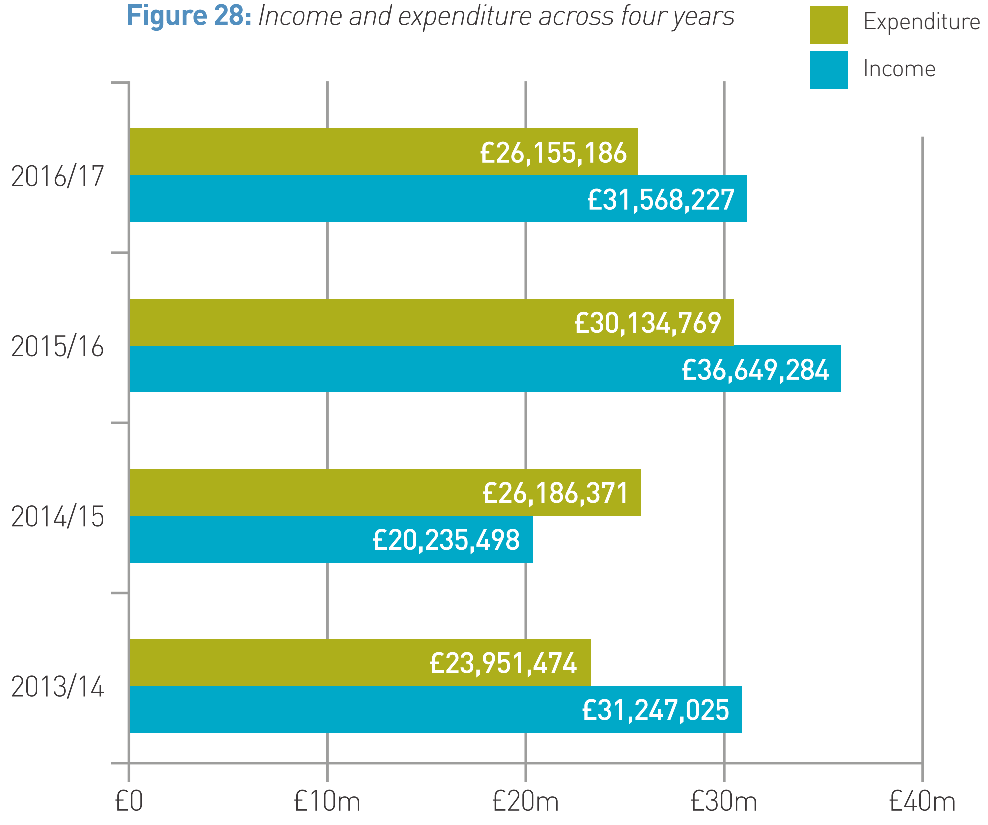


Figure 27: *Income generated by museums 2013/14 – 2016/17*

The 35% (59) museums reported:

- Museum expenditure in 2013/14 was worth 76% of total income
- Museum expenditure in 2014/15 was worth 129% of total income
- Museum expenditure in 2015/16 was worth 82% of total income
- Museum expenditure in 2016/17 was worth 83% of total income

Figure 28: *Income and expenditure across four years*



Workforce – paid staff

9% (15) of museums completed questions on the paid workforce across all four years. There has been a decline of just under 10% of Full-Time Equivalents (FTE) during the four years with 105.6 FTE reported in 2013/14 reducing to 96.4 in 2016/17. However the number of individuals in these paid roles has varied considerably across the four years and highlights that a significant proportion of the workforce are employed in part time roles. Museums reported a total of 149 members of paid staff in 2013/14 which rose by 44% to 216 in 2014/15, then reduced by 16% in 2015/16 and a further 5% in 2016/17.

Expenditure on staff

The museum survey commenced collecting information on the expenditure on staff costs in the second year, in 2014/15. Across the three years, the 9% (15) of museums reported expenditure on staffing ranging between 76% and 82% of total expenditure. The expenditure on staff costs does not follow the above reduction in Full-Time Equivalents (FTE). Whilst museums report an overall decrease in FTE of just under 10% the expenditure on staff has steadily increased over the three years. Reported overall expenditure on staffing for these 15 museums increased a further 3% during the 2015/16 - 2016/17 period.

Volunteers

In the four years of the survey the sample 15 museums reported the total of active volunteers. Volunteer numbers ranged from 1 to 238 per museum:

- Total volunteers 2013/14 – 767
- Total volunteers 2014/15 – 908
- Total volunteers 2015/16 – 878
- Total volunteers 2016/17 – 834

In the four years of the survey the 15 museums reported volunteer hours.

- 2013/14 – 87,293
- 2014/15 – 83,531
- 2015/16 – 73,642
- 2016/17 – 74,427

Figure 29: *Range of total number of paid staff and number of FTE paid staff*

	Range number of paid staff	Range number of FTE paid staff
2013/14	1 – 36	0.2 – 17.6
2014/15	1 – 48	0.2 – 26.1
2015/16	1 – 37	0.2 – 20.6
2016/17	1 – 42	0.2 – 21.1

SWMD Support

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

Axminster Heritage, Devon
'They have [...] been very helpful and supportive. Their input has helped in our Accreditation application on accessibility [...] especially as we are a new organisation.'

Chippenham Museum, Wiltshire
'We have worked closely with SWMD and have been very grateful for the support and advice given. Two grant aided projects have supported our development in a positive way. 'Small Grant Big Improvement' provided environmentally approved lighting in our cases and the 'Ready to Borrow' grant will enable [...] a new temporary exhibition gallery in which we can show high quality exhibitions and loans. [...] We have found the Museums Skills training invaluable. Throughout SWMD have provided helpful guidance and support.'

Corinium Museum, Gloucestershire
'I think every member of staff has benefitted from the training programme which is such a vital resource for small museums with very limited training budgets.'

Crofton Beam Engines, Wiltshire
'A really useful source of information and a great sounding board for ideas.'

Kingsbridge Cookworthy Museum, Devon
'Due to successful lobbying by South West Museum Development, our local district council is now contributing to the programme which gives us increased access to advice and grant funding.

Sherborne Museum, Dorset
'Staff have attended several training sessions supported by SWMD which were all highly informative and easily translatable to everyday work.'

SS Great Britain, Bristol
'Our Volunteer Manager has attended SWMD volunteering forum meetings and events. These have proven valuable in developing awareness of the potential for collaboration with universities, diversifying our volunteer base and the impact of volunteering on mental health and wellbeing. [...]

We also received funding for two new films promoting our Costumed Interpretation and Education Volunteer roles, and leaflets promoting our programme, through the 'Small Grant Big Improvement' fund. These materials have helped us to communicate our volunteering offer to a wider audience, and increase interest in these roles.'

Wheal Martyn, Cornwall
'As a small team with limited capacity we frequently have need to seek advice and support [...] and always find the support helpful and relevant. The need for this support is set to continue [...] as we have progressed a number of conservation projects within our collection.'

Russell-Cotes Art Gallery and Museum, Dorset
'We took advantage of training opportunities provided by the SWMDP and received support with our successful 'Ready to Borrow' application. We found the application more complicated due to our connection with the local authority and appreciated the support provided by SWMD in navigating the process.'

Bradford-on-Avon Museum, Wiltshire
'We successfully applied for a grant of just under £500 to renew and upgrade a number of public signs which we use when the museum is open. The grant application process was straightforward and clear, and the administration of the process of receiving the grant and reporting on the benefits that the museum had gained from the grant was well-managed. All-in-all a smooth and worthwhile experience.'

Museum of Bath at Work, B&NES
'Very supportive and helpful. Advice on application to the 'Ready to Borrow' scheme allowed the museum to make a successful application and to make major investment in security and collection management projects.'

Padstow Museum, Cornwall
'Our Museum Development Officer continues to guide us with invaluable help and support. We particularly need her wide experience to help us with the preparations for our move to new premises in the winter.'

Dunkirk Mill Museum, Gloucestershire
'In our route towards Accreditation, we have had exceptional support from the Museum Development Officer, keeping us on track with almost monthly meetings over the past eighteen months. The information and template documents have been vital to us as a small volunteer organisation.'

Wells & Mendip Museum, Somerset
'The museum has benefited from regular, helpful and useful advice and support from our Museum Development Officer and the Conservation Development Officer that we greatly value.'

Torre Abbey, Devon
'I have found the response to be quick and the team to be supportive and keen to advise and help.'

The Fashion Museum, B&NES
'Thank you to South West Museum Development for the continuing support and encouragement throughout 2016/2017. This year [we were] fortunate in securing an 'Small Grant Big Improvement' [...] to help improve the collection care and accessibility of vulnerable fashion-related objects [...] A direct consequence of the project includes a prospective loan of several pieces [...] to a major forthcoming exhibition, [...] at the V&A [...] we never would have come this far without the support of SWMD. Thank you to you all.'

With thanks to the following museums for participating

Cornwall

Bodmin Town Museum
Callington Heritage Centre
Constantine Museum
Cornwall's Regimental Museum
Elliott's Store
Falmouth Art Gallery
Geevor Tin Mine
Grampound with Creed Heritage Centre
Helston Museum
Lanhydrock (NT)
Lawrence House Museum
Lostwithiel Museum Association
National Maritime Museum Cornwall
Old Guildhall Museum and Gaol, East Looe
Padstow Museum
Penlee House Gallery & Museum
Perranzabuloe Museum
Redruth Old Cornwall Museum
Royal Cornwall Museum
Saltash Heritage
Telegraph Museum Porthcurno
The Castle Heritage Centre, Bude
Trerice (NT)
Wheal Martyn Clay Works

Devon

Allhallows Museum
Arlington Court (NT)
Ashburton Museum
Axminster Heritage
Bovey Tracey Heritage Centre
Braunton and District Museum
Britannia Museum
Burton Art Gallery and Museum
Castle Drogo (NT)
Coldharbour Mill Working Wool Museum
Coleton Fishacre (NT)
Combe Martin Museum
Dartmouth Museum
Dawlish Museum
Dingles Fairground Heritage Centre
Fairlynch Museum and Arts Centre
Holsworthy Museum Society
Ilfracombe Museum
Killerton (NT)
Kingsbridge Cookworthy Museum
Knightshayes Court (NT)
Lyn and Exmoor Museum
Museum of Barnstaple and North Devon
Museum Of British Surfing
Museum of Dartmoor Life
Newton Abbot Town and GWR Museum
North Devon Maritime Museum
Overbeck's (NT)
Plymouth City Museum and Art Gallery
Royal Albert Memorial Museum (RAMM)
Salcombe Maritime Museum
Sidmouth Museum
South Molton and District Museum
Tavistock Museum
Teign Heritage
The Bill Douglas Cinema Museum
The National Trust Carriage Museum at Arlington Court (NT)
Tiverton Museum of Mid Devon Life
Topsham Museum Society
Torquay Museum
Torre Abbey
Totnes Elizabethan House Museum

Dorset

Beaminster Museum
Blandford Fashion Museum
Blandford Town Museum
Bournemouth Natural Science Society
Bridport Museum Trust
Clouds Hill (NT)
Dorset County Museum
Gillingham Museum
Gold Hill Museum
Keep Military Museum
Museum of Design in Plastics
Poole Museum
Portland Museum
Priest's House Museum
Russell-Cotes Art Gallery and Museum
Scaplen's Court Museum
Shaftesbury Abbey Museum and Gardens
Sherborne Museum
Sturminster Newton Museum
Swanage Museum
Wareham Town museum
Weymouth Museum

Gloucestershire

Chedworth Roman Villa (NT)
Corinium Museum
Court Barn Museum
Dean Forest Railway Museum
Dr Jenner's House, Museum and Garden
Dunkirk Mill Museum
Holst Birthplace Museum
John Moore Museum
Kelmscott Manor
Museum in The Park
Museum of Gloucester
Nature in Art
Snowshill Manor and Garden (NT)
Tetbury Police Museum and Courtroom
Tewkesbury Museum
Wotton-under-Edge Heritage Centre

Somerset

Blake Museum
Bruton Museum
Clevedon Court (NT)
Coker Rope and Sail Trust
Community Heritage Access Centre
Dunster Castle (NT)
Frome Heritage Museum
Glastonbury Abbey
Helicopter Museum
King John's Hunting Lodge
Lytes Cary Manor (NT)
Montacute House (NT)
Museum of Somerset
Watchet Market House Museum
Wells and Mendip Museum
Weston Museum
Westonzoyland Pumping Station Museum

West of England

Bath Postal Museum
Bath Royal Literary and Scientific Institution
Beckford's Tower and Museum
Blaise Castle Museum (Bristol Culture)
Bristol Museum and Art Gallery (Bristol Culture)
Dyrham Park (NT)
Fashion Museum
Frenchay Village Museum
Glenside Hospital Museum
Herschel Museum of Astronomy
Holburne Museum
Kingswood Heritage Museum
Lydiard House
M Shed (Bristol Culture)
Museum of Bath Architecture
Museum of Bath at Work
Museum of Computing
Museum of East Asian Art
No. 1 Royal Crescent
Radstock Museum
Richard Jefferies Museum
Roman Baths Museum
Royal West of England Academy (RWA)
SS Great Britain
Steam – Museum of the Great Western Railway
Swindon Museum and Art Gallery
The American Museum in Britain
The Georgian House Museum (Bristol Culture)
The New Room, John Wesley's Chapel
The Red Lodge Museum (Bristol Culture)
Thornbury and District Museum
University of Bristol Theatre Collection
Victoria Art Gallery

Wiltshire

Alexander Keiller Museum, Avebury (NT)
Athelstan Museum
Bradford-on-Avon Museum
Chippenham Museum
Crofton Beam Engines
Fox Talbot Museum at Lacock Abbey (NT)
Market Lavington Museum
Mompesson House (NT)
Pewsey Heritage Centre
Rifles Berkshire and Wiltshire Museum
Salisbury Museum
Stourhead House (NT)
Trowbridge Museum
Wiltshire Museum

Produced by South West Museum Development.

With thanks to Devon Museums; Glastonbury Abbey; Priest's House Museum; Wheal Martyn Clay Works; Bradford-on-Avon Museum; Amanda Harman Photography and SWMD for photographic images.

For more information contact:

Victoria Harding, SWMD Programme Manager, or
Rachel Kavanagh, SWMD Audiences and Insights Officer:
victoria.harding@bristol.gov.uk or rachel.kavanagh@bristol.gov.uk

South West Museum Development Programme
Bristol Museum & Art Gallery, Queens Road, Bristol BS8 1RL

www.southwestmuseums.org.uk
@swmuseums

Documents available in other formats

If you would like this information in another language, Braille, audio tape, large print, easy English, BSL video or CD rom or plain text please contact:
0117 922 4653.

Supported using public funding by ARTS COUNCIL ENGLAND

Designed by Bristol City Council, Bristol Design | August 2018 | BD10770