

Annual Museum Survey 2024

Definitions guidance

For single-site & multi-site museums

May 2024



Produced by the team at Museum Development South West

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Usual Opening Hours

To calculate your usual total opening hours, multiply the hours you are open per day, by the number of days per year you are open. If your museum has remained closed during 2023/24 please enter '0'.

Audiences

A visit is a single trip to your museum by an individual of any age.

A 'visit' includes 'ordinary' visits, self-directed and facilitated education visits and onsite formal and informal education and engagement.

A 'visit' excludes any special events outside of normal visiting hours or private hire, such as corporate events and functions; also excluded is offsite engagement (such as tours or outreach) and staff visits (e.g. for training).

'Known visits' are visits where you know the exact number of people visiting. These figures are an actual audience count, ticketed (including complimentary tickets) or counted by some other precise method.

'Estimated visits' are where you do not know the exact number of people in attendance and you are providing an estimate. We ask that estimates only be offered if they are robust, i.e. based on either professional experience/knowledge and/or incomplete data that provides an indications of actual amounts.

Adult and Child visits

Adults - individuals aged 16 or over, who have visited the museum, including onsite post-16 formal and informal education and engagement (self-directed and facilitated)

Children - individuals aged under-16, including onsite self-directed and facilitated education visits and sessions up to Year 11. For a school visit by Year 11 groups, all the pupils should be regarded as being aged under-16

Formal Education Providers Engaged

'Formal education providers' refers to the organisations that took part in the onsite or offsite sessions (e.g. individual school, college or university)

Formal Education, Other Activities and Outreach

Formal education includes all education settings up to the age of 16 (e.g. nursery/pre-school, primary and secondary schools), Sixth Form and Further Education colleges and Higher Education institutions. Formal education refers to education with a specific goal, such as compulsory education or leading to an accredited qualification (e.g. A-Levels, degrees, formal TESOL qualifications).

Formal Education – On and off site

An on-site education session includes facilitated visits or activities at the museum (e.g. that are booked in advance and require a member of staff or volunteer to lead or supervise)

Off-site education sessions include visits to formal education settings by staff or volunteers, and sessions that do not require supervision by museum staff/volunteer (e.g. loan boxes).

Onsite and offsite participants include all pupils and students (excluding teachers and other supervisors)

Please only provide numbers that are from accurate counts of education sessions (e.g. bookings) or good estimates (e.g. based on the usual number of participants per session)

Other Activities and Outreach – On and off site

Other activities and outreach includes activities and events organised by the museum and/or by groups and organisations that are not formal education providers (e.g. family learning sessions, the Brownies, local arts organisations, community groups and so on, U3A, informal TESOL groups etc.).

Activities can be self-led, such as research work, or facilitated by a staff member or volunteer.

Activities include, but are not restricted to, workshops, seminars, talks, lectures, informal learning sessions, and individual research sessions.

An on-site session includes visits, events or activities at the museum that are arranged in advance (either by the museum or an external group).

Off-site sessions include visits to external organisations by staff or volunteers and other outreach events

Onsite and offsite participants include all instances of engagement or contact at an event or activity (e.g. people attending a talk, taking part in an informal learning session, or people visiting a stall at an event). Only contact with the museum should be included (e.g. for one talk at a larger external event only count those who attend the talk, not all visitors).

Please only provide numbers that are from accurate counts of attendance at activities and outreach events (e.g. from bookings) or good estimates (e.g. based on the usual number of participants at a regular group)

Website visits

'Unique visitors' refers to the number of distinct individuals requesting pages from the website during a given period, regardless of how often they visit.

If you have your own website you may be using Google Analytics or a similar tool to monitor how many people visit your website. If you are using Google Analytics unique visitors will be shown as 'Users'.

If you have a webpage or section on a website hosted by another organisation (e.g. your parent organisation, such as a local authority) they may be able to provide you with the number of unique visitors to your website.

Social Media Followers / Subscribers

Social media followers/subscribers include followers on Twitter, subscribers to a YouTube channel, likes on the museum's Facebook page etc.

The number of social media followers/subscribers changes over time. If you do not have a figure during or at the end of the financial year 2023/24, use today's figure (by checking your social media accounts and totalling all followers and subscribers).

If you use social media channels that are also used by a range of other organisations (e.g. across your local authority), only provide numbers for your own accounts.

Workforce – Employees and Volunteers

Your workforce includes any paid staff employed by the museum, trustees, volunteers and paid apprentices/trainees who are engaged by and managed by the museum

Employees include full-time, part-time, fixed term, casual/occasional, agency and 'zero-hours contract' employees who are paid through PAYE. Roles that are contracted out by the museum or your parent organisation to other organisations (e.g. security, cleaning), are also included amongst your employees.

Self-employed consultants and freelancers commissioned for sessional work (e.g. education) or specific projects (e.g. interpretation, project conservators, evaluation) do not count amongst your employees.

Your workforce does not include franchise staff (e.g. if your café is a franchise and the employees are not paid for by the museum).

Full Time Equivalent employees

- A member of staff working 5 days per week (full days) is 1 FTE
- A member of staff working 3 days per week is 0.6FTE.
- If a museum has 3 members of staff, one who works 5 days per week and two who work 3 days per week, the FTE number of paid employees would be 2.2 FTE.
- If you calculate your staffing in hours then for the purposes of this survey 35 hours would be classed as 1 FTE, so every 7 hours would count as 0.2 FTE.

Volunteers

Volunteers are those who receive no wages or salary, or who receive no more than the basic expenses, for example travel costs. Volunteers might be regular (full or part time) or one-off/occasional (e.g. for events). Please include Trustees in your count of volunteers but do not include unpaid internships/apprentices or work experience placements.

Calculate or estimate the total number of volunteer hours that the volunteers contributed to the running of the museum.

Financial Operations - Overview

Please report financial data for your most recent set of accounts or financial report (ideally your most recent financial year, falling in 2023/24). These may be provisional (not yet reported or submitted) or final (e.g. audited and/or submitted).

Total turnover/income in 2023/24: All income received or incoming resource via capital grants, core funding/public subsidy, project (revenue) grants, contributed income/charitable giving and fundraising, all earned/trading income and any other income (such as from investments and bank interest). For museums with a parent organisation (e.g. local authorities), this includes funding/budget assigned by that organisation to your museum (e.g. for staff, operations, capital projects) – this information may be in a budget for your museums or in a spending/expenditure report produced by your local authority.

Sources of income

Capital grant income: This includes capital only grants, funding and budget, and parts of grants or other funding that are capital (to be used for new or refurbished buildings, galleries or equipment). Please enter data for capital grant income received within the financial year (rather than a total award that might be received over several years).

Public Subsidy

Public subsidy is sometimes known as 'core funding'. Public subsidy covers the running costs of your museum and/or your core activities. Core funding may be in the form of grants, investment or other funding received annually, with a longer-term agreement or a one-off arrangement. Typically public subsidies are provided by local authorities, for Arts Council NPOs, for DCMS funded National museums or by other parent organisations (e.g. MoD or Universities). Some local authorities may provide a public subsidy via a community trust or foundation which has taken the place of a local authority service or department.

Project / Revenue Grants

Project/revenue grants are those that might be awarded by NLHF, Arts Council England, Museum Development or other organisations (local and national) for time-limited and one-off projects such as local heritage projects, programmes of events, festivals, research and interpretation, conservation and so on. These grants may cover the cost of resources, such as project staff, volunteer costs, materials and marketing, but are not part of a museum's core-funding or capital only projects.

Admissions

Total admissions: The total income for all visitors who have paid to enter the museum (inclusive of Gift Aid), either for entering the museum (standard charge) or charges for temporary exhibitions

Other Earned income

Earned income includes that received from admissions charges, cafes, retail and other trading and earning. Other trading and earnings include a range of activities such events, education, hospitality, functions, property rental or hire, online retail, film and TV, licensing, consultancy etc. For a charity, 'earned income' might be the total of all charitable activities (e.g. admissions, education charges) and trading (e.g. hire, retail, café)

Café, Retail and trading

Shop or retail space: Must be on-site

In-house café/refreshments: Onsite and owned by the museum, or all income and expenditure is assigned to the museum

Contracted café/refreshments: An external or parent organisation runs the café and receives income from the café (e.g. a franchise for which the museum receives rent or part of the income) If you have a café that is contracted out, enter the income that your museum received not the total income the cafe generates.

Other trading and earnings: a range of activities including events, education, hospitality, functions, property rental or hire, online retail, film and TV, licensing, consultancy etc.

Donations and Contributed Income

Contributed income and charitable giving encompasses all types of donations (one-off, on-site donation boxes, online giving, legacies/bequests, regular giving), all fundraising activity (e.g. events, corporate sponsorship), friends/membership schemes, and all other fundraising

Expenditure

Total Expenditure: All expenditure and costs in 2023/24, including staff, operations, premises, capital projects, trading, marketing and fundraising etc. If you have a parent organisation (e.g. a local authority), this includes expenditure/costs assigned to your museum by that organisation (e.g. staff, premises, supplies, re-charge).

Staff costs include all costs (salaries, National Insurance etc.) relating to staff employed by your museum including contracted and permanent.

Further Context

Please provide information on how things have changed for your museum, or main museum site, during 2023/24 across key areas such as audience, workforce, wider operating environment or any other impacts.

Equality and Diversity

Equality and Diversity Planning includes:

- Writing or updating an Equality and Diversity Action Plan for your museum
- Writing or updating plans towards Equality and Diversity in your museums' forward plan, business plan (or equivalent)