SHARE Museums East

Annual Survey of Museums 2017-18

Norfolk Museums Service

SHARE Museums East
a network of know how

Supported using public funding by ARTS COUNCIL ENGLAND

Foreword

The renowned management theorist and consultant Peter Drucker said,

"If you can't measure it, you can't manage it".

Understanding ourselves – our organisations – is key to knowing where to put our resources and effort, and how we should plan for the future.

So it is good to see that the response to SHARE's Benchmarking Survey this year has exceeded even last year's record figure of 74%. This gives us a robust set of data on which to base our understanding of how museums in the region are performing and how to plan for the future.

There are some interesting trends. The number of volunteers and the hours they contribute remains stable. Museums in the region created over 1,200 jobs, a higher figure than last year. And it is good to see that museums are diversifying their funding base with increasing use of charitable funding, individual giving, corporate sponsorship and other funding sources.

As ever, there are some trends which need careful monitoring. The total number of visitors to museums rose on last year, but has declined slightly since 2015-16; it remains to be seen whether this is a longer term change or will reverse again in the future. Some museums are doing well with their retail income and donations, but too many museums are still not using these income sources to their full potential. SHARE will be looking at this and other data to assess the region's priorities and inform its plans for future years.

I would like to take this opportunity to thank everyone who contributed to the 2017-18 Benchmarking survey. Once again, your time and input will make a real difference to our programmes. I encourage you to use the data to make a difference to your organisation too.

Steve Miller

Assistant Director Community and Environmental Services (Culture & Heritage), Head of Norfolk Museums Service, Head of Norfolk Arts Service
Norfolk County Council

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Summary of 2017-18 findings

The East of England welcomes large numbers of visitors to the region each year. A high proportion of tourists visit certain areas of the region, coming to see the North Sea coastline of Norfolk and Suffolk, the historic university city of Cambridge, the marshy Fens and Norfolk Broads or the world's longest pleasure pier at Southend in Essex. In the areas closer to London, including Bedfordshire, Hertfordshire and parts of Essex, audiences are more locally-based.

Museums in the East of England play an important role for both tourism and local communities in defining the unique sense of place across this diverse region. Their collections and the services they deliver, help to shape these communities and tell the stories of time, place and people.

Response rate

- 130 Accredited museums in the region responded to the 2017-18 Annual Survey of Museums. This equates to a 75% response rate from museums within the Accreditation scheme.
- As of April 2018 there were 173 museums in the East of England within the Accreditation scheme. 13% of all Accredited museums in England are located within the region.

Audiences

- 3,494,695 visits made to museums in 2017-18 based on responses received
- 6,659 activities and events engaging 365,797 participants

Economic impact

- Visits to museums represented £37.7m of gross visitor impacts
- There were at least £18.2m of direct, indirect and induced impacts as a result of spend on goods and services by museums
- At least 1,265 Full Time Equivalent (FTE) direct, indirect and induced jobs were supported by museums

Online engagement

- 92% (119) of respondent museums have their own website
- 86% (112) used social media to engage with audiences

Educational engagement

- Museums delivered 8,205 learning and outreach activities engaging 273,967 participants
- Museums delivered 6,993 learning sessions on-site engaging 208,299 participants, and 1,212 outreach sessions which reached 65,668 participants

Financial operations

- £10.8m was generated by museums in earned income (including admissions, retail, catering, events, hospitality, educational and other earned income from trading, e.g. property rental)
- £15.2m received in regular public funding (including ACE MPM/National Portfolio funding)
- £6.7m received in grant funding
- £6.9m 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

- 10,687 active volunteers in 2017-18
- On average, museums had 82 volunteers
- Volunteers contributed a total of 581,991 hours to museums in the region, which was worth around £4.2m

Workforce – paid staff

- Museums employed 1,473 paid staff equating to 805 full time equivalents
- 25% (32) of respondent museums were entirely volunteer-run with no paid staff

Introduction

This report presents the findings of the SHARE Museums East's Annual Survey of Museums 2017-18.

The survey was developed in the South West in 2012 to establish a baseline of sector data and, in 2017-18, is being used to analyse and report on trends in eight of England's nine regions.

Findings from the data can contribute to estimates of the social and economic impacts of museums and also help inform how SHARE Museums East, 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 survey has been developed and delivered by South West Museum Development (SWMD) with the intention of providing consistent data capture across multiple regions to enable more effective advocacy and benchmarking. Survey questions were developed in consultation with museums and local authorities and incorporated ideas from pre-existing data collection exercises from other regions.

Questions have been adapted to align with Arts Council England's annual survey of Major Partner Museums and National Portfolio Organisations.

SWMD has been commissioned to deliver the SHARE Museums East's Annual Survey of Museums since 2015-16.

Survey method

The survey was sent to all 173 museums in the East of England region who are fully Accredited, provisionally Accredited or formally Working Towards Accreditation. It was also promoted via SHARE Museum East's website, blog, through targeted e-bulletins, MDO's and local museum networks. Museums were given the option of either online completion or a paper copy of the survey. Multi-site organisations were supplied with a new form to provide a response as a whole organisation; how this data has been incorporated into the report is highlighted on the following page.

The survey asks museums to provide data for the 2017-18 financial year (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 2017-18 period. 66% (86) of museums reported all data for
1 April 2017 - 31 March 2018.

The survey is divided into five sections:

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

Sample and response for 2017-18

75% (130) of museums within the Accreditation scheme responded to this year's survey. There are 173 Accredited museums in the region; the number of Accredited museums is taken from the Accreditation statistics for April 2018, the date of the Accreditation panel most recent to the period of the survey. 7% (12) of museums are formally Working Towards Accreditation. The 75% response rate is a 1% increase from last year's survey and is broadly representative of the region in terms of geography and the different types of museums.

A new approach to the data collection process from museum service providers who operate multi-site and/or co-located museum sites was developed this year using a bespoke form. The form was designed to provide more flexibility for organisations who collect a blend of both service-wide and site-specific data, most typically around educational activities, financial operations and workforce. This also provided a better understanding of data to inform analysis.

The core premise of the survey is determined by individual Accredited museums sites, however 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 to enable a consistency of approach across the data provided. For multi-site responses, adjusted data has been recorded as 'estimate' to reflect this intervention.

Where a single museum site includes more than one Accredited museum collection, the organisation has been consulted in order to provide an estimate of the percentage of visitors allocated to each respective site or, where this is not possible, data has been included as a single site and the overall total has been adjusted accordingly.

Six multi-site organisations provided survey returns, representing 25 museums and 19% of the 75% return rate. 16% (21) were Local Authority run and 3% (4) were independent. A further 6% (8) of respondent museums self-categorised as University multi-site organisations, however, they all have the ability to collect site-specific data and as such responded to the survey as individual museums.

There were four additional responses to SHARE Museum East's survey, however these were from non-Accredited museums who are, regrettably, not included within the analysis undertaken for this report. SHARE Museums East would like to thank these museums for submitting their survey and for supporting the collection of sector data in the East of England. The participation and provision of this data is still valuable to SHARE and used to contribute to regional and local understanding of the museum sector in the East of England.

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

- Not all museums responded to every question
- Percentages have been rounded to the nearest whole number
- 'Respondent' or 'Museum' is every museum who submitted a response
- 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

Profile of respondents

75% (130) of museums responded to this year's survey. A full list of 2017-18 respondent museums is included at the end of this report. The response rate was dominated by independent and local authority museums, which is reflective of the typology of Accredited museums in the East of England.

National Trust is under-represented in the sample with one respondent from the 10 National Trust Accredited museums. The East of England is home to a number of large properties with high visit numbers. The 4 English Heritage sites are also not represented in the sample. Although these sites represent only 8% of the museums in the region, they will have an impact on the state of the regional sector and the regional economy.

Figure 1: All Accredited museums by type

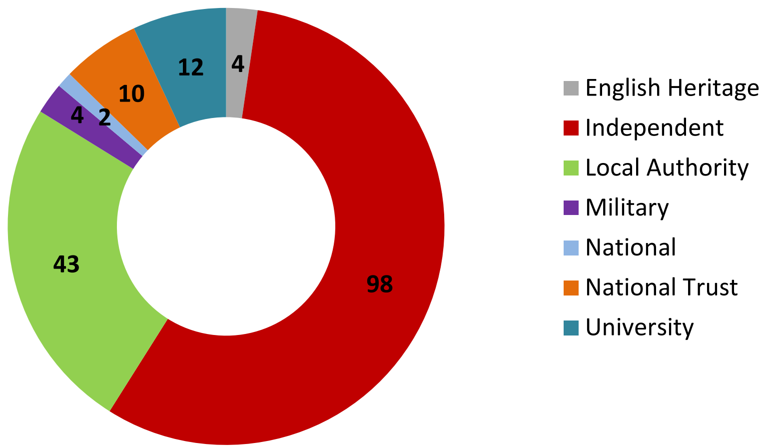
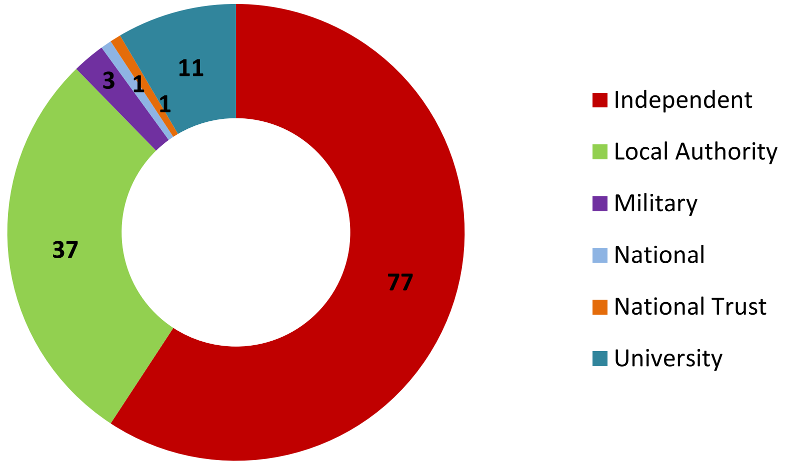


Figure 2: All respondent museums by type



Museum opening arrangements

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

- 43% (56) reported that they were open all year round
- 46% (60) reported that they were closed part of the year as regular seasonal closure
- 6% (8) of museums were open by appointment only – 2% (3) for just part of the year, and 4% (5) all year round
- 5% (7) of museums were closed for part of the year for redevelopment, refurbishment and/or repair

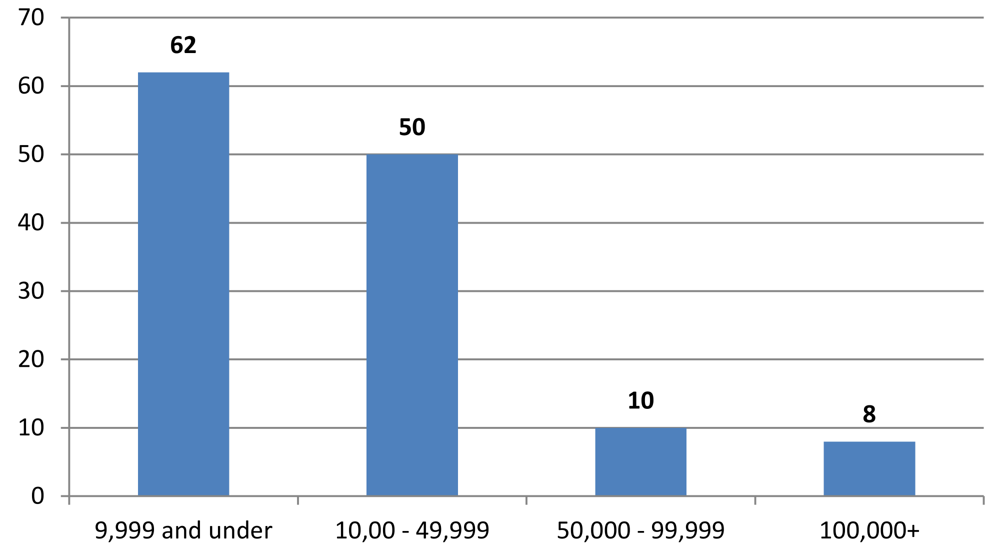
Respondents by size

The museum sector in the East of England includes a diverse range of organisations but is notably comprised of a large number of independent museums who welcome fewer than 10,000 visits per annum, in comparison to other English regions. The distribution of museums across three of the four categories is consistent with 2016-17 returns, however, the medium museum group has increased from 44 to 50 based on reported audience numbers.

For the purpose of this report the size of a museum has been determined by the reported visit numbers. Four bands provide simple categories of Small, Medium, Large and Extra Large within which museums have been allocated.

- Small museum - 9,999 and under visits per annum
- Medium museum - 10,000 – 49,999 visits per annum
- Large museum - 50,000 – 99,999 visits per annum
- Extra Large museum - 100,000+ visits per annum

Figure 3: Respondents by museum size



Geographic distribution

The East of England consists of six counties - Bedfordshire, Cambridgeshire, Essex, Hertfordshire, Norfolk and Suffolk. Figure 4 highlights the variation in response rate from each county, ranging from 100% in Bedfordshire to 64% in Norfolk.

Figure 4: Respondents by sub-region

Sub-region	No. of respondents/no. of Accredited museums	Percentage return rate
Bedfordshire	8 of 8	100%
Cambridgeshire	30 of 36	83%
Essex	27 of 35	77%
Hertfordshire	18 of 25	72%
Norfolk	21 of 33	64%
Suffolk	26 of 36	72%

Audiences

This section looks at overall visitor figures, visits by children and online engagement. The information provided here is from the 2017-18 data. Further analysis and trend data is presented in the comparison data section at the end of this report.

Total visit figures

A total of 3,494,695 visits were made to museums in 2017-18 based on the responses received. Visit figures in the data are heavily influenced by a small number of extra large museums with 100,000+ visitors per annum. As a result 8 museums (6%) account for 44% of all visits. 100% of respondent museums reported visit figures for 2017-18, which ranged from just under 300 to over 400,000 visits per annum.

75% (98) of museums provided actual figures and 25% (32) providing estimates.

Museum opening hours

91% (118) of museums reported opening hours as follows:

- The lowest number of hours a museum opened in 2017-18 was 26 hours
- The highest number of hours a museum opened in 2017-18 was 3,432
- Opening hours in 2017-18 totalled 151,372

Figure 5: Visit figures by museum size

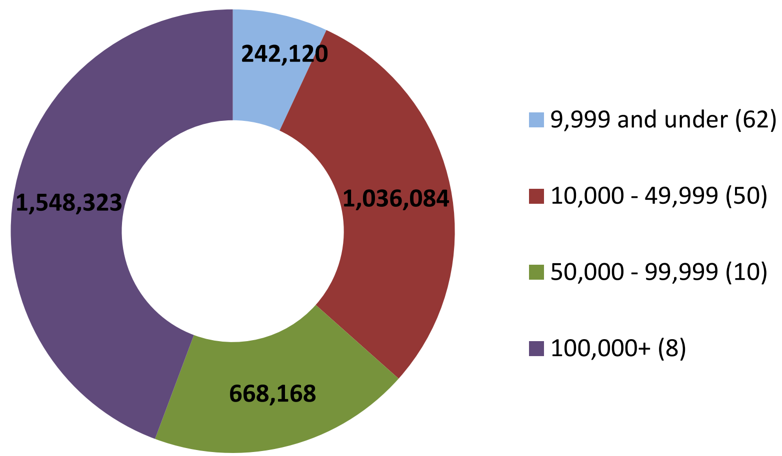
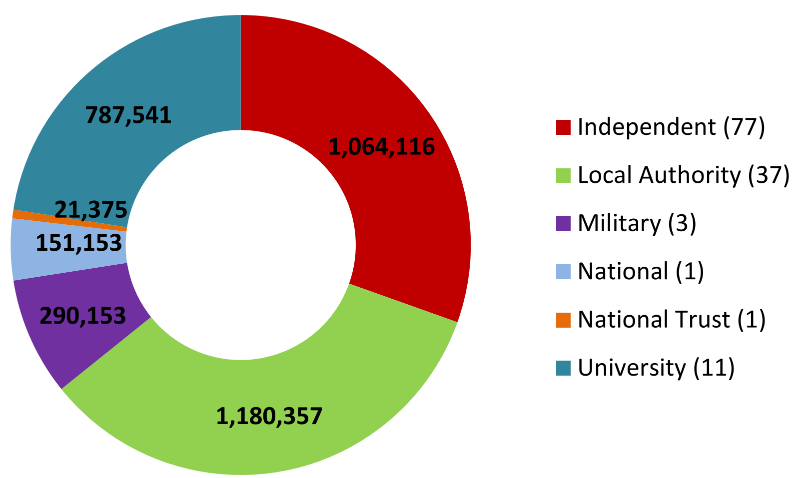


Figure 6: Visit figures by museum type



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Visit figures by sub-region

Figure 7 details the breakdown of visits per sub-region. Cambridgeshire received the highest number of visitors in 2017-18 by over 660,000: this figure is attributed to the fact that half of the region's museums with 100,000+ visits per annum are located in Cambridgeshire; the majority of these museums are in the University of Cambridge and are free entry.

Figure 7: Visit figures by sub-region

Sub-region	Total visit figures	Percentage of regional visit figures
Bedfordshire	359,985	10%
Cambridgeshire	1,264,045	36%
Essex	397,239	11%
Hertfordshire	453,985	13%
Norfolk	603,810	17%
Suffolk	415,631	12%

Visits by children

87% (113) of respondent museums provided a breakdown of visits into adults and children (under 16). 42% (54) of respondents reported actual figures for both, whilst 45% (59) reported estimates.

806,324 visits by children to museums in the East of England were reported in 2017-18. Based on these responses, children accounted for 23% of all visits. Museums with 100,000+ visits per annum reported the highest percentage of visits by children in the region, at 9% of all visits, whilst museums with 9,999 or less visits per annum reported the lowest at just 2% of all visits.

Figure 8: Visits by children by museum size

Museum size	Total visits by children	Sample	Child visits as percentage of total visit figures by museum size
9,999 and under	54,422	56 of 62	22%
10,000 – 49,999	259,698	46 of 50	25%
50,000 – 99,999	166,592	7 of 10	25%
100,000+	327,650	5 of 8	21%

Economic impact of visits

In 2017, 10 of the top 20 most-visited free attractions and 14 of the top 20 most visited paid-for attractions in the East of England were museums and historic properties, according to Visit England's *Annual Survey of Visits to Visitor Attractions 2017.* Of 24 museums and historic properties venues, 20 were Accredited museums.

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. A more in-depth visitor survey would be required to evaluate the economic impact of overnight stays. As a result, the true overall economic value of visits is likely to be greater due to the higher levels of visitor spend associated with overnight visits. The current application of the AIM assumed visitor spend model is considered a pragmatic approach which balances contributing museums' efforts with robustness of calculation whilst maintaining high levels of participation across the sector. Further tools are available to museums to generate in-depth assessments of economic impact.

This year three museums who were classed as 'Large' and 'Extra Large' in 2016-17 did not return the survey; they were located in Cambridgeshire and Suffolk, the only counties which saw decreases in visit figures (16% and 5% respectively) since last year. Visits to these museums in 2016-17 totalled almost 500,000 with just under £10m reported in gross economic impact between them. Along with the overall 3% decrease in reported visit figures, and variations in reporting trends, these three museums may account for a considerable portion of the decrease in reported economic impact between 2016-17 and 2017-18.

Economic impact calculation

- This calculation takes the number of adult visits to a museum, establishes the average ratio of local and day visits and multiplies these by average visitor spend assumptions, both developed by DC Research from regional and national tourism datasets.

- In 2017-18 total adjusted adult visits is estimated to be 2,403,496 based on an adult:child ratio of 75:25 for museums with 9,999 visits and under; 72:28 for museums with 10,000 – 49,999 visits; 61:39 for 50,000 – 99,999 visits; and 69:31 for museums with 100,000+ visits per annum.

Applying this methodology to the visit data provided by museums, the gross visitor impact was £37,713,025 on the economy in the East of England:

- £12,570,535 was a reported in 'local' visitor spend in 2017-18
- £25,142,490 was a reported in 'day' visitor spend in 2017-18

Figure 9: AIM Economic Impact Toolkit assumed 'Local' and 'Day' visitor spend by sub-region

Sub-region	'Local' visitor assumed spend	'Day' visitor assumed spend	Gross visitor impacts
Bedfordshire	£8.90	£17.79	£2,832,504
Cambridgeshire	£17.99	£35.98	£15,746,180
Essex	£12.91	£25.82	£3,943,496
Hertfordshire	£11.29	£22.59	£3,885,622
Norfolk	£14.08	£28.16	£6,155,830
Suffolk	£12.86	£25.73	£5,149,392

Online engagement

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

Websites

92% (119) of respondent museums have their own website. Whilst 8% (11) of museums reported that they did not have their own website, a number are featured on their local authority's website, or their parent organisation's website.

Many museums are also featured on, or their individual websites are linked to, sub-regional museum network websites such as the Hertfordshire Association of Museums, Museums in Cambridgeshire or the Association for Suffolk Museums as shown below.

53% (69) of respondents to this section of the survey provided data on the number of unique visits to their websites reporting an estimated total of 3,525,601 unique visits in 2017-18.

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.

86% (112) of museums stated that they used social media to engage with audiences with platforms including Facebook, Twitter and Instagram most frequently cited. Museums reported an estimated 1,090,770 subscribers or followers.

Visit England's *Annual Survey of Visits to Visitor Attractions 2017* report stated that platforms such as Pinterest and Instagram have seen the biggest growth in usage by visitor attractions. 44% of attractions surveyed by Visit England are now using them, double what it was in 2015. However, of the attractions surveyed by Visit England, Facebook and Twitter are still the most used platforms by 85% and 69%, respectively. These findings chime with the data reported by museums in the East of England.

However, whilst 12% (15) of museums stated that they did not use social media, they all reported that they have their own website. This reveals that all museums are utilising some form of online presence to engage with their audiences.

Education, activities and events

Learning and education are core motivations in all museums services. These activities are delivered in a wide variety of ways, depending on the museum in terms of their physical space, their collections, the partnerships they develop and the capacity, skills and experience of paid staff and volunteers.

Figure 10 details the number of education sessions delivered by museums, both on-site and off-site, during 2017-18 along with the number of participants.

Museums in the East of England engaged with an estimated 1,700 different schools and educational organisations in 2017-18.

77% (100) of respondents provided information on the number of on-site educational sessions and 79% (103) provided information on on-site activities and events. It is important to note that recording of both varied between museums and not all respondents provided data on both the number of sessions and the number of participants. As a result it is not possible to attribute a relationship between the number of sessions and the number of participants without significantly reducing the overall sample.

Figure 10: Educational sessions

	Total	Sample
No. of on-site sessions	6,993	100 of 130
No. of participants to on-site sessions	208,299	104 of 130
No. of off-site sessions	1,212	74 of 130
No. of participants to off-site sessions	65,668	75 of 130

Figure 11: Activities and events

	Total	Sample
No. of on-site sessions	5,249	103 of 130
No. of participants to on-site sessions	194,029	100 of 130
No. of off-site sessions	1,410	97 of 130
No. of participants to off-site sessions	171,768	94 of 130

Highlight: the ‘Peterborough Treasures’ exhibition

In 2015 Peterborough Museum was awarded a £50,000 Small Scale Capital Grant from SHARE to improve its gallery security and environmental status. This enabled it to meet the Government Indemnity Standard for the first time, and to receive major loans from lenders such as the British Museum and the V&A.

Building on the SHARE Capital Grant, the museum was able to apply for other grants including £87,200 from the Heritage Lottery Fund and £24,000 from the Weston Loan Programme with Art Fund. This enable it to realise its ten-year ambition to bring Peterborough’s Treasures together for the first time.

The museum was able to borrow significant objects to celebrate Peterborough’s 900th anniversary in 2018, including the Roman Water Newton treasure, a collection of early Christian silver; the St Thomas Becket Casket, an decorated casket commissioned by Abbot Benedict of Peterborough to hold the saint’s relics; and the Peterborough Chronicle, a monastic record of life in Saxon England which contains the first-known written use of the female pronoun ‘she’ in English.

Financial operations

Museums are asked to identify both the financial year they operate and the financial period for which they had submitted data.

- 66% (86) of respondents offered financial data for the financial year 1 April 2017 – 31 March 2018
- 17% (22) stated that their financial year runs the calendar year
- 22% (29) operate under different financial terms such as the academic year or November - October, to name but two that were highlighted

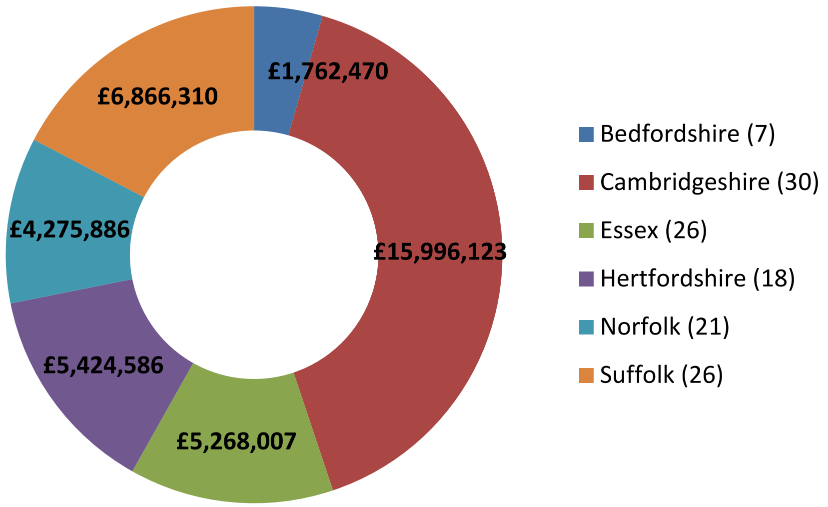
Therefore the data presented here should be considered a guide, rather than being representative of a specific financial period.

Income

98% (128) of respondent museums reported figures for income for 2017-18. The total income generated and received by museums reported in 2017-18 was £39,593,382:

- £10,824,776 in earned income including admissions, retail, catering, events, hospitality, educational and other earned income from trading, e.g. property rental
- £15,155,572 received in regular public funding including Arts Council Major Partner Museum or National Portfolio funding
- £6,707,790 received in grant funding
- £6,905,244 received in contributed income including all money received in donations, friends members/schemes, any sponsorship income, corporate membership, or other non-earned income.

Figure 12: Total generated income by sub-region



Total generated income by museum size is as follows:

- £5,196,784 generated by museums with 9,999 or fewer visits per annum
- £14,143,664 generated by museums with 10,000 – 49,999 visits per annum
- £6,208,475 generated by museums with 50,000 – 99,999 visits per annum
- £14,044,459 generated by museums with 100,000+ visits per annum

Breakdown of income

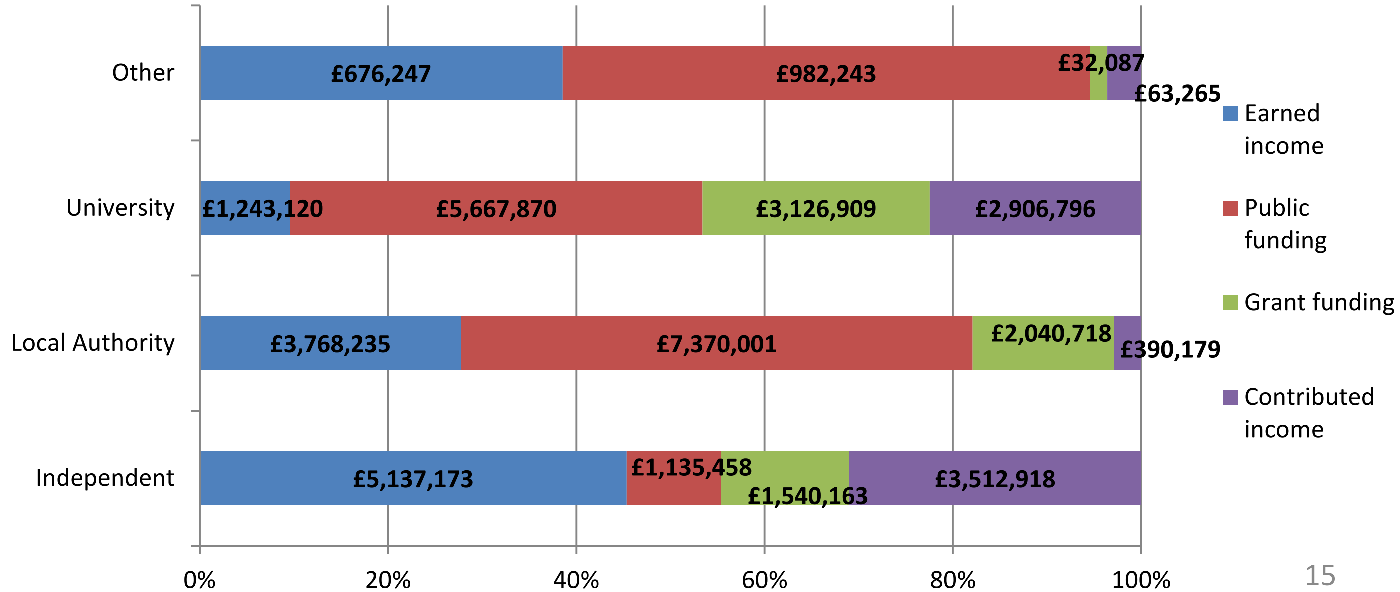
Figure 13 details the breakdown of income by charging model in relation to type of museum, whilst figure 14 shows the breakdown of sources of income by museum type. In both figures 'Other' includes Military, National and National Trust.

Where museums reported that they charged admission seasonally or for some exhibitions, these have been categorised within overall charged admission.

Figure 13: Total income by charging model per museum type

	Total income for museums with charged admission	Sample	Total income for museums with free admission	Sample
Independent	£9,992,056	46	£1,194,178	31
Local Authority	£6,579,153	19	£6,968,981	18
University	No charge	0	£12,932,695	11
Other	£85,431	1	£1,668,411	3

Figure 14: Breakdown of income sources by museum type



Admission charges

100% (130) of respondents provided information on admissions.

- 51% of museums charged admissions
- 45% permanently charged admission
- 5% charged only for some exhibitions or seasonally
- 49% (64) offered free admission all year round

Based on the 59% (66) museums who charge admission, including the 5% (7) who charge seasonally or for some exhibitions, £7,717,746 was generated in admissions income in 2017-18. The admission charge for an adult ticket ranged between £1 and £14.99. The admission charge for a child ticket ranged between £0.20 and £9.99.

Figures 17 and 18 present the average admission charges for museum by size. 45% (59) of museums provided information on their adult admission charges and 35% (46) provided information on admission charges for children.

Figure 15: Average adult admission charges by museum size

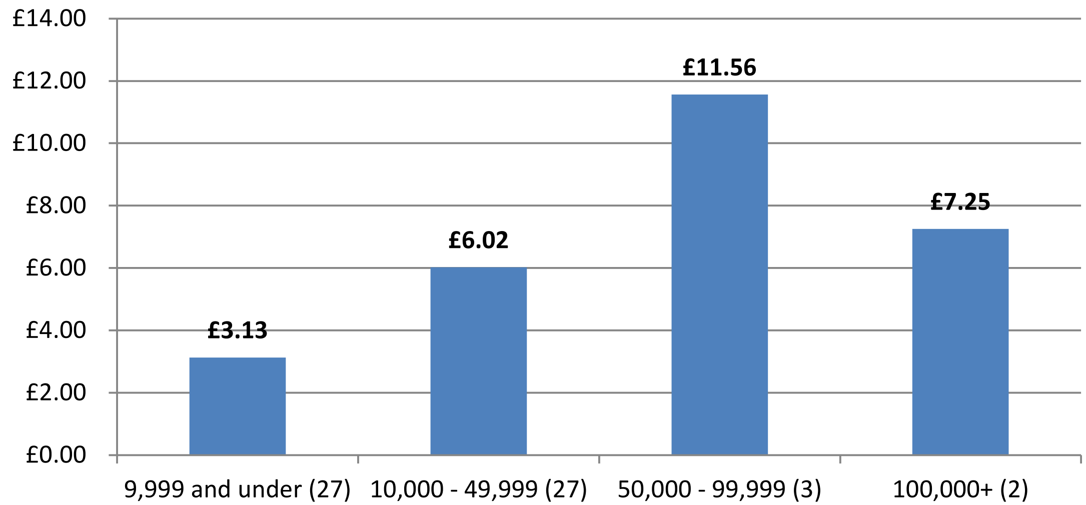
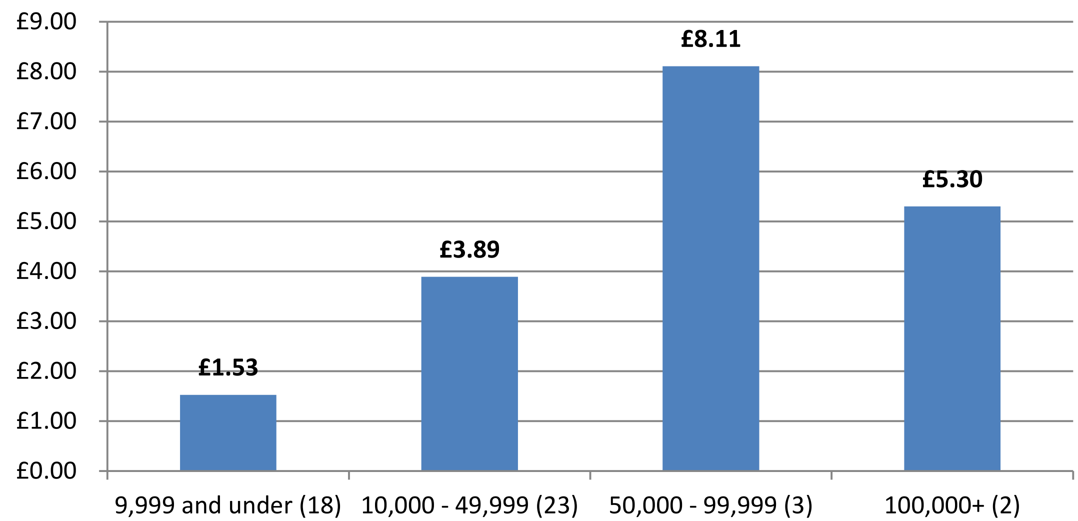


Figure 16: Average child admission charges by museum size



Retail income

With the increasing focus on financial resilience and the need to diversify income, the majority of museums have developed a retail offer. Even in museums where space is limited and the offer is focused on cards or guidebooks, monies generated from retail can still provide a valuable additional source of income.

85% (111) of respondent museums in the East of England have a shop or a retail space. Based on the data from 84% (110) of museums who reported retail revenue the total retail income for 2017-18 was £2,346,106.

The average retail spend per head is an important indicator used to assess the effectiveness of a museum's retail offer. 84% (110) of museums provided the required data for this to be measured. A significantly higher sample has been generated this year, with 85% (compared to 48% of museums in 2016-17) providing reporting on both the retail spend and total visits to perform this calculation. To ensure consistency with the analysis on the previous section looking at admissions, museums who charge admissions seasonally or for exhibitions have been included within the category 'charged admission' in Figure 20.

Figure 17: Average retail spend per head by museum size

	Average	Lowest	Highest	Sample
9,999 and under	£0.84	£0.08	£4.76	48
10,000 – 49,999	£1.05	£0.02	£9.57	47
50,000 – 99,999	£0.58	£0.06	£1.11	9
100,000+	£0.62	£0.23	£1.30	6

Figure 18: Average retail spend per head by charging model

	Average	Lowest	Highest	Sample
Free admission	£0.67	£0.02	£2.71	47
Charged admission	£1.06	£0.08	£9.57	63

Catering income

Catering can provide another important source of income for many museums.

- 27% (43) had an in-house café/refreshment facilities
- 5% (7) contracted out their café/refreshments
- £1,461,383 was generated in catering income as reported by these 41 museums in 2017-18

Donations

Museums were asked to provide information on their donations in order to generate an average donation per visitor from the data. The approach for calculating donations income per head has been to divide total donations reported by total visitor numbers.

85% (111) of museums provided information on their donations. The lowest value for donations per head was £0.01, whilst the highest was £9.79. Museums generated £2,660,911 in donations income. A further two museums also reported figures for donations but were omitted from this calculation due to anomalies in the data.

Similarly to the previous two sections, charged admission in figure 22 also includes museums who charge seasonally or for some exhibitions only.

Figure 19: Average donations per head by museum size

	Average	Lowest	Highest	Sample
9,999 and under	£0.88	£0.01	£4.04	54
10,000 – 49,999	£0.79	£0.01	£9.79	43
50,000 – 99,999	£0.10	£0.03	£0.36	8
100,000+	£0.11	£0.01	£0.20	6

Figure 20: Average donations per head by charging model

	Average	Lowest	Highest	Sample
Free admission	£0.51	£0.01	£2.40	54
Charged admission	£0.97	£0.01	£9.38	57

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Highlight: reshaping retail and donations practice

In 2014 the 100th Bomb Group Memorial Museum in Norfolk received tailored retail and donations consultancy and training from the SHARED Enterprise programme. The museum's retail income was restricted by inability to take card payments and a lack of performance information about its retail sales.

The museum was awarded funding to buy a new electronic till coupled to a card-reader. Volunteers and trustees received training in using the till and how to monitor key performance indicators for sales. At the same time they completely refurbished the shop area and reviewed the stock, buying in new, more profitable items.

The museum also received a review of its donations practice, as a result of which it moved its donations box and started 'seeding' it with notes rather than coins.

In the three years since the project started, retail and donations income have gone from strength to strength. Being able to take card payments has increased sales significantly. Turnover and profit have both increased, and donations have doubled to the point where they now make a substantial contribution to an annual surplus.

SHARED ENTERPRISE

Impact of spend on goods and services

Direct, indirect and induced impacts

Attributing economic impact to an individual organisation or sector is a specialised and technical task which involves a range of complex assumptions. However, the AIM Economic Impact Toolkit methodology that is being applied does provide an evidence based estimate which all museums, irrespective of size or governance type, are able to contribute to. As a result we can estimate the economic value of museum spend on goods and services:

- As a minimum there was £18,236,826 of direct, indirect and induced impacts in the East of England as a result of spending on goods and services by museums during 2017-18.

This calculation is based on museum expenditure figures, excluding staff spend, from 89% (116) 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.

27% (35) of museums specified that they had received capital investment in 2017-18, totalling £4,356,643.

Figure 21: Impact of spend on goods and services by sub-region

	Value	No. of responses
Bedfordshire	£220,471	7
Cambridgeshire	£1,312,723	26
Essex	£532,462	24
Hertfordshire	£452,073	16
Norfolk	£372,649	18
Suffolk	£1,058,589	25

Expenditure and staff costs

63% (82) of responses were received from museums and museum services that employ staff and provided figures for both total expenditure and total expenditure on staff costs. On average, spending on staff accounted for 54% of total expenditure, which breaks down as follows:

There was a reported total of £19,186,592 expenditure on staff costs by museums in 2017-18:

- 5% (7) of museums spent an average of between 6% - 20% of their total expenditure on staff costs
- 12% (16) of museums spent an average of between 21% - 39%
- 18% (23) of museums spent an average of between 45% - 60%
- 20% (26) of museums spent an average of between 61% - 80%
- 8% (10) of museums spent an average of between 81% - 94%

In Figure 23, 'Other' includes Military, National, 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. However, it is worth noting that local authority museums have not included the wider staff costs related to centrally provided services such as finance, HR, legal and IT support. Therefore it is reasonable to conclude that the true cost of staffing as a percentage of total expenditure within local authority museums is likely to be higher than has been reported.

	Average % of total expenditure on staff	Lowest %	Highest %	No. of responses
9,999 and under	50%	6%	85%	31
10,000 – 49,999	52%	11%	84%	39
50,000 – 99,999	71%	57%	85%	6
100,000+	77%	54%	94%	6
Independent	46%	6%	83%	40
Local Authority	59%	11%	85%	31
University	69%	50%	85%	7
'Other'	76%	48%	94%	4

Figure 22: Average expenditure on staff by museum type

Fundraising

Museums were asked about the ways in which they fundraise, the sources of grant income and whether they had used online giving or crowdfunding to raise funds in 2017-18.

87% (113) museums received monies through additional fundraising, many from more than one source, the results of which can be seen in figure 24. 13% (17) of museums reported that they did not receive any further income from fundraising.

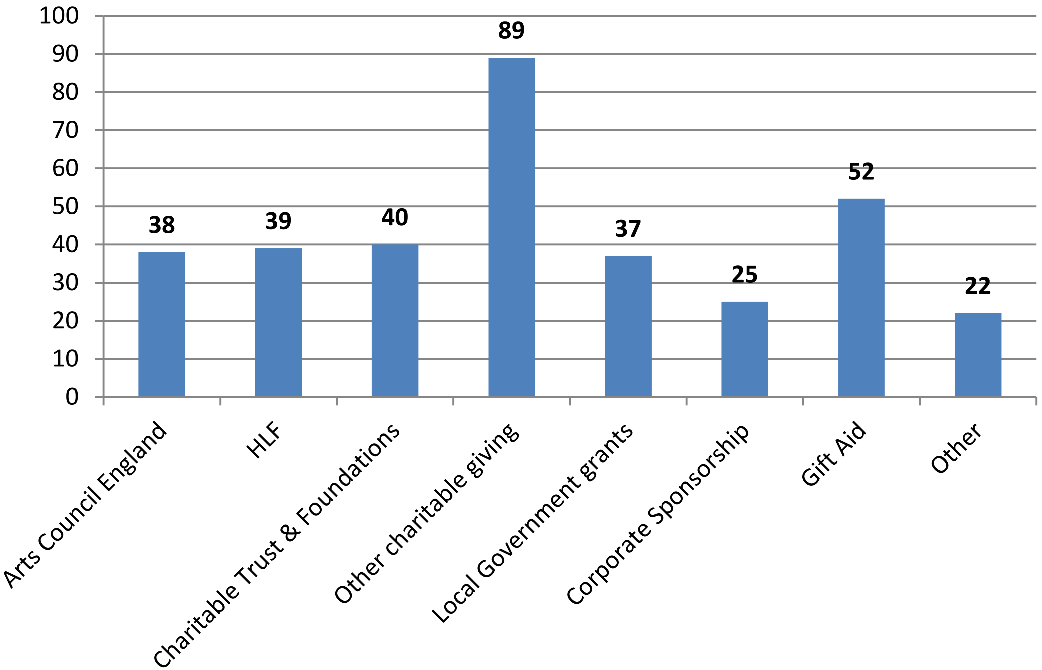
Museums were asked whether they had received additional funds through a variety of funding sources:

- Arts Council England and HLF;
- charitable trusts and Foundations;
- other charitable giving such as Friends schemes or donations;
- local government grants (non-core funding);
- corporate sponsorship offering cash donations;
- or any other which they were asked to specify.

Answers to the latter question included: Historic England; National Trust; British Museum; Environment Agency; the Research Council; Higher Education Innovation Fund; SHARE Museums East; and through wind turbine community grants schemes.

In the East of England's additional question about online giving, 12% (15) of museums said that they had used online giving in the last 12 months. Sources quoted include Just Giving; Virgin Money; CAF Donate; Amazon Button; Spacehive; Indiegogo; and East Fundraising.

Figure 23: Additional sources of funding 2017-18



Workforce

Paid staff

Museums were asked to provide information on both the total head count of staff employed by the museum at its peak in the year and the number of Full Time Equivalents (FTE) during 2017-18. 68% (89) of museums provided data on both these questions.

- Museums employed a total of 1,473 paid staff
- Museums employed 805 FTEs
- 52% (68) of museums reported actual figures for paid staff, whilst the remaining 11% (14) reported that their figures were estimates
- 48% (62) of museums employ between 1 – 20 members of paid staff, based on figures provided for total head count
- 5% (7) reported that they employed between 21 – 40 members of paid staff
- 1 museum reporting that it employed over 50 members of paid staff, whilst a further 1 reported employing over 200 members of paid staff
- FTEs at museums ranged from 1 FTE, at 12% (16) of museums, to 160 FTEs at 1 museum

Employment impacts

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

- These museums created 1,265 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.

Equality, Diversity and Inclusion

This year museums were also asked an additional question around their workforce focusing on equality, diversity and inclusion. Museums were asked whether or not they had an Equality and Diversity Action Plan:

- 54% (70) reported that their museum organisation did have an equality and diversity action plan
- 33% (43) reported that their museum organisation did not have an equality and diversity action plan
- 13% (17) of respondents reported that they did not know

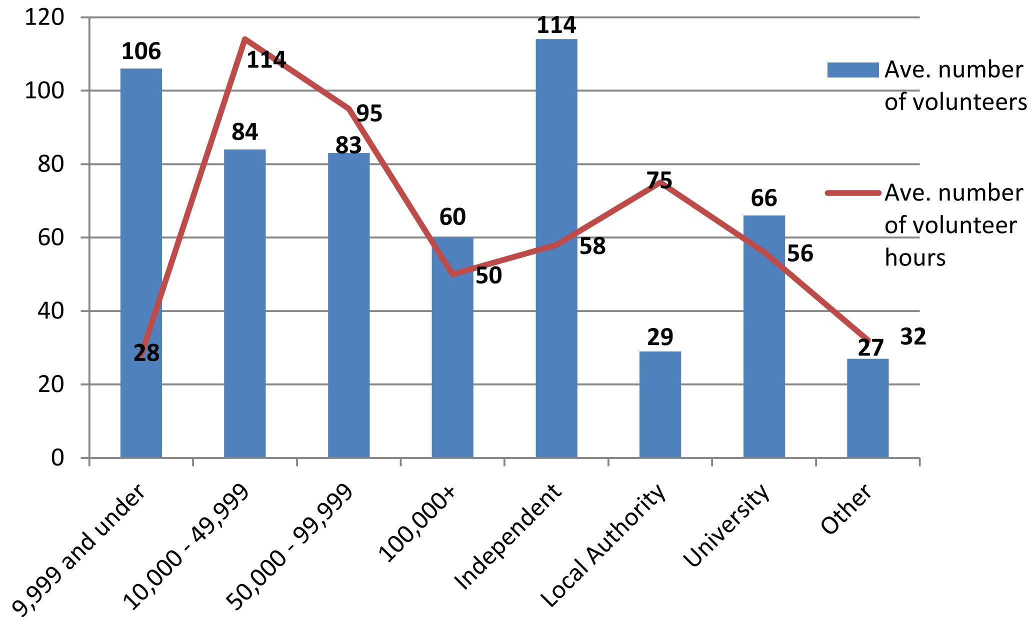
Volunteers

Volunteers are a vital part of the museum workforce. The involvement of loyal volunteers makes a huge difference to museums and is often the key to operating a wide range of services irrespective of the size, location or type of museum provision.

- Museums reported a total of 10,687 volunteers, based on the responses of 99% (129) of museums
- This ranged from 1 to 4,316 volunteers per museum
- 25% (32) of museums reported that they are entirely volunteer run
- The total number of volunteer hours recorded was 581,991 by 92% (119) of respondent museums
- 34% (44) of museums reported actual figures for volunteer hours, whilst 63% (82) reported that their figures were estimates
- Volunteer hours are estimated to have contributed around £4.2m to the regional economy

The number of active volunteers reported in 2017-18 has increased by 61% from the previous year, although the number of hours reported has decreased by 28%. However, it could be assumed that the higher proportion of estimated figures suggests that many museums may find it difficult to accurately record volunteer hours, especially when some volunteer roles take place at home or out of normal business hours, so it is possible that volunteer hours could in fact be much higher than reported.

Figure 24: Average number of volunteers per museum and average number of contributed hours per volunteer by museum size and museum type



Comparative data

In this section data is considered across a sample of museums who have provided data in three key areas of the survey - audiences, financial operations and workforce. Only museums who have provided data across these three areas, and in each year of 2015-16, 2016-17 and 2017-18 survey, can be considered as part of the sample for comparison data. In order to generate the largest possible sample group, each key area of the survey is considered independently. In line with the public funding invested in the Museum Development programme the survey has been applied to Accredited museums and those formally working towards Accreditation.

In the East of England the number of museums within the Accreditation scheme has increased from 167 in 2015-16 to 173 in 2017-18.

Responses to SHARE Museum East's Annual Survey of Museums since 2015-16 are as follows:

- 72% (120) response rate out of 167 Accredited museums in 2015-16
- 74% (125) response rate out of 168 Accredited museums in 2016-17
- 75% (130) response rate out of 173 Accredited museums in 2017-18

Since 2015-16 responses to the survey have been broadly consistent in percentage terms but seen actual returns increase from 120 to 130 in the current year.

Figure 25: Accredited respondents to the survey by museum size across three years

	2017-18	2016-17	2015-16
9,999 and under	62	62	63
10,000 – 49,999	50	44	43
50,000 – 99,999	10	11	10
100,000+	8	8	7
Total	130	125	123

Figure 26: All respondents to the survey by museum type across three years

	2017-18	2016-17	2015-16
Independent	77	83	77
Local Authority	37	37	39
Military	3	2	2
National	1	2	2
National Trust	1	0	1
University	11	8	8
Total	130	132 (incl. 6 closed for redevelopment)	129 (incl. 6 closed for redevelopment)

Audiences

The following data on visit figures was drawn from a sample of 70% (91) of museums who responded to the survey in each of the three years and provided their figures for total visits:

- Total visits 2015-16 – 2,863,052
- Total visits 2016-17 – 2,731,453
- Total visits 2017-18 – 2,752,530

Visits have remained relatively steady year-on-year:
- Between 2015-16 and 2016-17 visits decreased by 5%
- Between 2016-17 and 2017-18 visits increased by 1%

Overall visit figures reported by these museums since 2015-16 have decreased by 4%.

The impact calculations for 'Local' and 'Day' visitor assumed spend have similarly been applied to results of this sample group, as they have in the core 2017-18 report.

Figure 28 presents the results of these calculators across the three years of reported data. It is notable that figures for 'Local' and 'Day' visits in 2015-16 and 2016-17 have only marginal differences, however, 'Local' visitor impact in 2017-18 saw an increase of 7% from the previous year, whilst 'Day' visitor impact saw a large decrease of 41%. It is likely that these figures are due to variations in economic impact calculation that adjusts the number of adult visits to establish the average ratio of local and day visits to a museum, as detailed on page 10 of this report.

Figure 27: Total visit figures and sample museum visit figures, with sample museum visit figures as percentage of total visits

	Total visit figures	Sample museum visit figures	Sample museum visit figures as % of total visit figures
2015-16	3,538,641	2,863,052	81%
2016-17	3,606,169	2,731,453	75 %
2017-18	3,494,695	2,753,530	79%

Figure 28: Assumed 'Local' and 'Day' visitor impacts for sample museums over three years

	'Local' visitor impact	'Day' visitor impact	Gross visitor impact
2015-16	£9,830,482	£35,805,460	£45,635,942
2016-17	£9,591,904	£35,060,146	£44,652,050
2017-18	£10,252,427	£20,506,360	£30,758,787

Financial operations

Comparative data on financial operations is shown here from a sample of 36% (47) of museums who reported their financial income. A total income of £31.2m was reported by the sample museums over the three years:

- £11,617,888 income in 2015-16, which was 35% of total income of all respondents
- £10,362,234 income in 2016-17, which was 27% of total income of all respondents
- £9,232,595 income in 2017-18, which was 23% of total income of all respondents
- Overall, income reported by the sample museums decreased by 21% between 2015-16 and 2017-18

The 36% (47) of museums seen in the sample here also provided data on their financial expenditure in each year of the survey. Figure 29 details their expenditure in comparison to income; in the first two years of the survey the sample museums reported expenditure which was between 15% and 28% higher than their reported income. In 2017-18 expenditure was reported to be only 2% less than income generated by these museums.

Fundraising

SHARE Museums East has asked questions on additional sources of funding and fundraising in all three years of the survey. To show the variations in responses across each year, figure 30 includes all respondents to this section of each survey and not just the sample 36% (47) of museums discussed in the section above.

Figure 29: Total income and expenditure for sample museums across three years

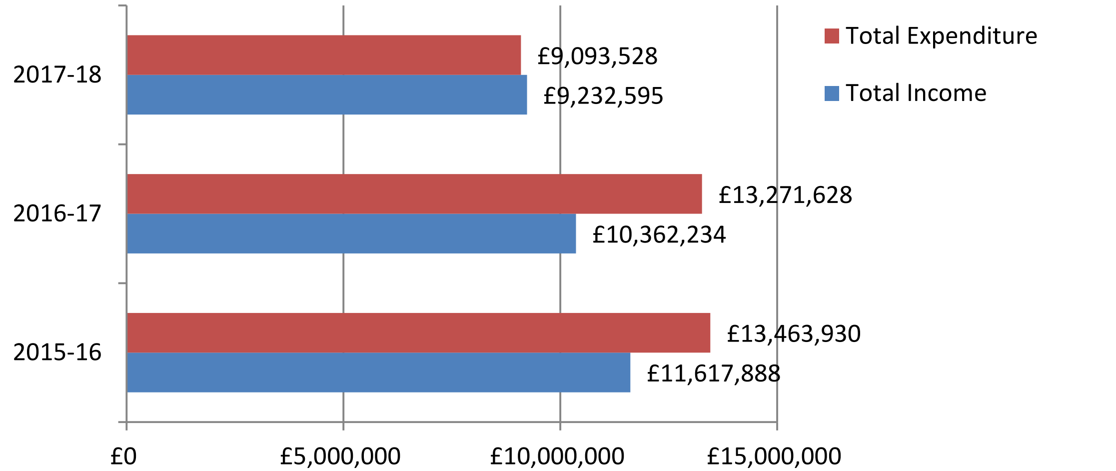
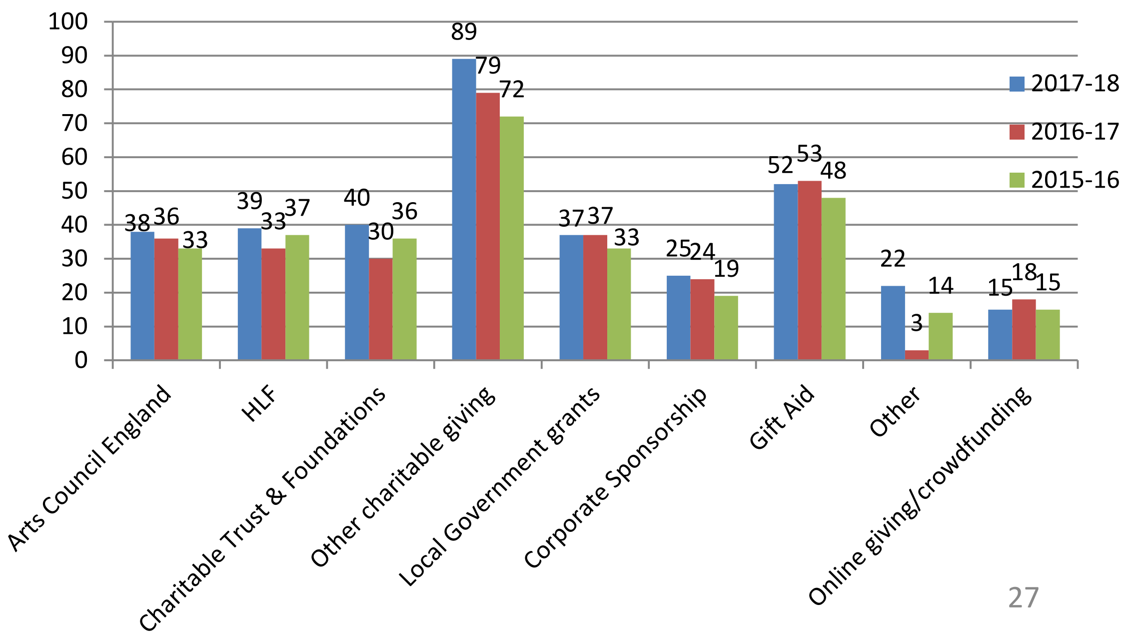


Figure 30: Sources of funding and fundraising for all respondents across three years



Workforce – Paid staff

29% (38) of museums provided data on both paid staff and volunteers in all three years of the survey. Numbers for both paid staff and full time equivalents (FTEs) reported by the sample museums remained constant in 2015-16 and 2016-17, as did the range of paid staff and FTEs as highlighted in figure 31.

Museums reported the following figures relating to their paid workforce:

- Total paid staff 2015-16 – 565 (total FTE – 369)
- Total paid staff 2016-17 – 565 (total FTE – 369)
- Total paid staff 2017-18 – 599 (total FTE – 387)

However, when considering the number of paid staff and FTE from all respondents to the survey, the figures reported by museums in 2017-18 and detailed on page 25 of this report, identify a significant increase of 61% from figures reported the previous year. This equated to a 13% increase in FTEs. This increase is measured from returns representing 67% (89 of 130) respondent museums in 2017-18.

Expenditure on staff

The sample of museums, 29% (38), also provided figures for their expenditure on staff in each year of the survey. Across the three years, reported expenditure on staff costs was an estimated average of 88% of total expenditure. The expenditure on staff costs follow the increase of paid staff and FTEs in 2017-18, as these museums reported the highest figure of £11m spent on staff costs in this year of the survey.

Figure 31: Range of total number of paid staff and number of FTEs across three years

	Range no. of paid staff	Range no. of FTE paid staff
2015-16	1 - 189	0.4 - 165
2016-17	1 - 189	0.4 - 165
2017-18	1 - 203	1 - 160

Volunteers

The sample museums reported a total of 6,532 active volunteers across three years. Volunteer numbers increased 11% between 2015-16 but have remained broadly constant across the last two years. Volunteer numbers range from 4 to 268 per museum across the group:

- Total volunteers 2015-16 – 2,038
- Total volunteers 2016-17 – 2,266
- Total volunteers 2017-18 – 2,228

The total number of volunteer hours reported by the sample museums reflect a significant increase of 38% between 2015-16 and 2016-17 followed by a decrease of 11% between 2016-17 and 2017-18.

- Total volunteer hours 2015-16 – 149,973
- Total volunteer hours 2016-17 – 207,068
- Total volunteer hours 2017-18 – 184,076

Volunteer hours from the core sample museums across the three years were worth over £3.8m to the East of England economy.

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East of England support

Museums were asked about support or advice they received from SHARE: here is a sample of what they said:

'SHARE has been incredibly useful as I take on all the roles at a small museum, as I have needed to learn a lot very quickly! Networks are also extremely useful for those of us working in small museums.'
Burwell Museum and Windmill, Cambridgeshire

'Brilliant support from SHARE - training, project funding support, skills sharing.'
Royston and District Museum and Art Gallery, Hertfordshire

'Yes, Training sessions for GDPR and for Retail Forum, all very useful, have implemented GDPR and increasing success of retail operation, 56% up on the year. '
Gainsborough's House, Suffolk

'The support, mostly in terms of training and support for an HLF bid was outstanding .'
Norfolk and Suffolk Aviation Museum, Suffolk

'Good support from professional adviser, and Museum Development Manager over accreditation and our plans for moving site .'
Woodbridge Museum Trust, Suffolk

'Very helpful in supporting the development of the museum, recruiting volunteers and extending a professional profile.'
March and District Museum, Cambridgeshire

'Yes, the support and advice received from SHARE is the most valuable that we receive because it is rooted in shared experience across this region within this sector.'
The Natural History Museum at Tring, Hertfordshire

'We are part of the Heritage Engineering Network which is supported by SHARE. The training sessions and networking at these sessions is invaluable. We will continue to attend these meetings and encourage more of our volunteers to also attend. '
Prickwillow Engine Trust, Cambridgeshire

'With their help and advice SHARE has enabled Ware Museum to be proactive in their choice of further rationalisation of the Museum's collections.' **Ware Museum, Hertfordshire**

'Participating in the SHARE Fundraising cohort has been very beneficial in providing tips for accessing various grant funds and general fundraising. It has helped us to focus on telling our story, why it is worthwhile for individuals or organisations to support us .'
Wisbech and Fenland Museum, Cambridgeshire

'Courses are excellent and advice is sound and readily available.'
Military Intelligence Museum, Bedfordshire

'We received assistance through the SHARE Museums East governance grant which kick-started a monumental change in the museum.'
The Cater Museum, Essex

'We have received advice on copyright issues and working towards accreditation, which we have found of great benefit.'
Maldon District Museum Association, Essex

'Excellent Security Seminar. Followed up with a security review with crime prevention officer; looking to implement the changes suggested.'
RNLI Henry Blogg Museum, Norfolk

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With thanks to the following museums for participating

Multi-site organisations

CIMS – Colchester and Ipswich Museums
LC – Luton Culture
NMS – Norfolk Museums Service
SMS – Southend Museums
St. E – St. Edmundsbury
UCM – University of Cambridge Museums
WH – Welwyn Hatfield

Bedfordshire

John Bunyan Museum and Library
Leighton Buzzard Railway Museum
Military Intelligence Museum (Intelligence Corps Museum)
Stockwood Discovery Centre (LC)
The Panacea Museum
The Higgins, Bedford
Wardown Park Museum (LC)
Woburn Heritage Centre Museum

Cambridgeshire

Airborne Assault Museum
Burwell Museum and Windmill
Cambridge Museum of Technology
Chatteris Museum
Cromwell Museum
Centre for Computing History
Ely Museum
The Farmland Museum
The Fitzwilliam Museum (UCM)
Norris Museum (Herbert Ellis Norris Museum and Library)
Kettle's Yard (UCM)
March and District Museum
Museum of Cambridge
Museum of Classical Archaeology (UCM)
New Hall Art Collection at Murray Edwards College (UCM)
Octavia Hill's Birth Place Museum
Peterborough Museum and Art Gallery
The Polar Museum (UCM)
Prickwillow Engine Museum
Ramsey Rural Museum
Royal Anglian Regiment Museum
Sedgwick Museum of Earth Sciences (UCM)
St Neots Museum
Stained Glass Museum
Thorney Heritage Museum
University Museum of Zoology, Cambridge (UCM)
University of Cambridge Museum of Archaeology and Anthropology (UCM)
Whipple Museum of the History of Science (UCM)
Whittlesey Museum
Wisbech and Fenland Museum

Essex

Beecroft Art Gallery (SMS)
Brentwood Museum
Brightlingsea Museum
Burnham-on-Crouch and District Museum
The Cater Museum
Chelmsford Museum
Colchester Castle Museum (CIMS)
Combined Military Services Museum
East Anglian Railway Museum
Epping Forest District Museum
Essex Collection of Art from Latin America
Essex Fire Museum
Essex Police Museum
Fry Art Gallery
Halstead and District Local History Society
Hollytrees Museum (CIMS)
Maldon District Museum
Mersea Island Museum
Museum of Power
Natural History Museum, Colchester (CIMS)
Paycocke's House and Garden
Prittlewell Priory and Museum (SMS)
Saffron Walden Museum
The Scout Association
Southchurch Hall Museum (SMS)
Southend Central Museum (SMS)
Southend Pier Museum

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With thanks to the following museums for participating

Hertfordshire

Ashwell Village Museum
British Schools Museum
Dacorum Heritage Trust
De Havilland Aircraft Heritage Centre
Elstree and Borehamwood Museum
Garden City Collection Study Centre
Hertford Museum
Lowewood Museum
Mill Green Museum and Mill (WH)
Natural History Museum at Tring
North Hertfordshire Museum (Hitchin Museum and Art Gallery / Letchworth Museum and Art Gallery)
Royston and District Museum and Art Gallery
Stevenage Museum
University of Hertfordshire Art Collection
Verulamium Museum
Ware Museum
Watford Museum
Welwyn Roman Baths (WH)

Norfolk

100th Bomb Group Memorial Museum
Ancient House Museum (NMS)
Bressingham Steam Museum
Cromer Museum (NMS)
Bishop Bonner's Cottage (Dereham Antiquarian Society)
Diss Museum
Elizabethan House Museum (NMS)
Fakenham Museum of Gas and Local History
Gressenhall Farm and Workhouse (NMS)
Lynn Museum (NMS)
Museum of Norwich at the Bridewell (NMS)
Museum of the Broads
Norwich Castle Museum and Art Gallery (NMS)
RNLI Henry Blogg Museum
St Seraphim's Icon and Railway Heritage Museum
Strangers' Hall Museum (NMS)
Swaffham Museum
Sheringham Museum
Time and Tide Museum (NMS)
Tolhouse Gaol and Museum (NMS)
William Marriot Museum (Midland and Great Northern Joint Railway Society)

Suffolk

Aldeburgh Museum
Beccles and District Museum
Bentwaters Cold War Museum
Christchurch Mansion (CIMS)
Clare Ancient House Museum
Dunwich Museum
The East Anglia Transport Museum
Felixstowe Museum
Gainsborough's House
Halesworth and District Museum
Haverhill and District Local History Centre
Ipswich Museum (CIMS)
Ipswich Transport Museum
Little Hall, Lavenham
Long Shop Museum
Lowestoft Maritime Museum
Lowestoft Museum
Mildenhall and District Museum
Moyse's Hall Museum (St. E)
Museum of East Anglian Life
National Heritage Centre for Horseracing and Sporting Art (Palace House)
Norfolk and Suffolk Aviation Museum
Orford Museum
The Red House (Britten Pears Foundation)
West Stow Anglo-Saxon Museum (St. E)
Woodbridge Museum

Produced by South West Museum Development on behalf of SHARE Museums East:
www.southwestmuseums.org.uk

For further information on this report or SHARE Museums East please contact Jamie Everitt, Programme Manager, SHARE Museums East:
jamie.everitt@norfolk.gov.uk
www.sharemuseumseast.org.uk

Norfolk Museums Service

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