Museum Development Yorkshire

Annual Survey of Museums 2018-19

Supported using public funding by ARTS COUNCIL ENGLAND

Museum Development Yorkshire

Foreword

The Annual Survey of Museums 2018-19 is part of an England wide data collection exercise for museums in, and working towards, the UK Museum Accreditation Scheme. It is the first time in over a decade that museums across the country have been able to critically assess their position and performance in the context of their peers.

This report represents a snapshot of the regional museum sector and indicates the scale of our impact, reaching c. 8million visitors and contributing c. £200m the region's economy. This economic impact is generated through £130m visitors and £70m direct, indirect and induced impacts. Thanks to the participation and support of 60% of the region's museums to the survey, the global information in this report has a confidence level of 95% with a 6% margin of error.

Using information in this report to review their plans and priorities, museums will help realise Museum Development Yorkshire's vision for the museums of Yorkshire and the Humber to be secure, accessible and sustainable homes for their collections, and of value to the diverse communities they serve.

Michael Turnpenny, Head of Museum Development

Summary of 2018/19 findings

Response rate

- 63% (92) of Accredited museums in the region responded to the 2018-19 Annual Museums Survey

Audiences

- A total of 7,805,693 visits to museums in 2018-19 based on responses received
- Museums held a total of 4,756 activities and events that engaged 552,765 participants

Economic impact

- Visits to museums represented around £128,589,000 of gross visitor impacts
- There were at least £36,751,000 of direct, indirect and induced impacts as a result of spend on goods and services by museums
- At least 2131 Full Time Equivalent (FTE) direct, indirect and induced jobs were supported by museums

Online engagement

- 76% of respondent museums have their own website and 98% used social media to engage with audiences

Educational engagement

- Museums delivered 12,221 learning and outreach activities engaging 402,697 participants

Financial operations

- £32,036,391 was generated by museums in earned income (including admissions, retail, catering, events, hospitality, educational and other earned income from trading, e.g. property rental)
- £22,078,788 received in regular public funding (including ACE MPM/National Portfolio funding)
- £2,648,140 received in grant funding
- £4,594,860 received in contributed income (including all money received in donations, friends members/schemes, any sponsorship income, corporate membership, or other non-earned income)
- £6,109,000 secured in capital investment

Workforce – paid staff

- Museums employed 2000 paid staff equating to 1269 full time equivalents
- 12% of respondent museums were entirely volunteer-run reporting no paid staff

Workforce – volunteers

- 3892 active volunteers in 2018-19
- Ranging from 1 to 276 volunteers per museum
- Based on information provided, the volunteer to paid staff ration is almost 1:10 when considering the Full Time Equivalents rather than numbers of staff or volunteers
- Volunteers contributed a total of 369,834 hours to museums in the region, which was worth a minimum of £1,430,000. This value is based on a calculation of £50 per day using guidance issued by the National Lottery Heritage Fund

Introduction and survey method

This report presents the findings of the Museum Development Yorkshire 2018-19 Annual Survey of Museums.

The survey was created in the South West in 2012 to establish a baseline of data on museums and is now being used to analyse and report on trends over a period of time in nine English regions. Findings from the data can contribute to estimates of the social and economic impacts of museums and also help inform how regional Museum Development providers deliver support to museums. The data within this report can enable museums to benchmark themselves against a range of comparators.

The methodology has been developed and delivered by South West Museum Development (SWMD) with the intention of providing consistent data capture across multiple regions to enable more effective advocacy and benchmarking. The survey has remained broadly consistent since 2012-13. In 2019 additional logic was introduced to aid clarity around questions on finance and workforce. Survey questions have been developed in consultation with museums and local authorities and considered approaches from pre-existing data collection exercises from other regions.

Where possible questions have been adapted to align with Arts Council England's previous annual survey of Major Partner Museums and, since 2019, the Annual Survey of National Portfolio Organisations.

SWMD has been commissioned by Museum Development Yorkshire (MDY) to deliver the Annual Survey of Museums for the first time in 2018-19. This work builds on previous regional survey initiatives operated by MDY. This work will help build a national data set for the sector.

Survey method

The survey was sent to all museums in the region who are fully Accredited, provisionally Accredited or formally Working Towards Accreditation, as well as being promoted by the regional Museum Development Officers. The majority of museums have participated via the regional online survey. The option to complete the survey via a paper copy was also provided.

Multi-site organisations were given the option to either provide a response as a whole organisation using a bespoke off line form, or by individual site; museums which provided a multisite response are highlighted on the following page.

Survey questions relating to finance, employment, volunteering and social media have been mapped across to the National Portfolio (NPO) Annual Survey and NPOs were able to submit their NPO Annual Survey for transcribing to prevent duplication of effort. However a key distinction between the NPO Annual Survey is that it captures data at organisational, rather than Accredited museum, level. Where NPO data has been submitted to represent multiple Accredited museums the total value reported has been distributed based on the weighting of audience numbers for each of the Accredited museum sites.

The surveys asks museums to provide data for the previous 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 must be for the previous financial year.

The survey was divided into five sections:

- Audiences
- Educational engagement
- Financial operations
- Workforce

Sample and response

63% (92) of 145 museums within the Accreditation scheme responded to the survey in 2018/19. As of June 2019 Arts Council Accreditation statistics (the date of the Accreditation panel most recent to the period of the survey) there are 150 Accredited museum sites in the region. However four of the 150 Accredited museum sites have been recorded as permanently closed. Also, one museum Working Towards Accreditation was recorded as temporarily closed during 2018-19. Seven museums in the region are formally Working Towards Accreditation.

Museums in the Yorkshire and Humber region account for 10.8% of all Accredited museums in England. The response rate to the survey is broadly representative of the Yorkshire and Humber region in terms of geography (ranging from 24% - 85%) and the different types of museums with a good response from English Heritage.

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

This is the second year in which the SWMD methodology for data collection from museum service providers who operate multi-site and/or co-located museum sites has applied a bespoke template rather than via the online survey. This approach was designed to provide more flexibility for organisations to report a mix of service-wide and site specific data.

The core premise of the survey is determined by individual Accredited museums sites, therefore it was important to develop a consistent approach to data provided from multi-site and co-located organisations.

Site-wide data, which is collected centrally by the organisation rather than at site-level, has been attributed to individual sites based on a ratio of audience numbers. This approach has enabled an increased consistency of analysis across the data provided. For multi-site responses, adjusted data has been recorded as 'estimate' to reflect this intervention.

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.

Ten multi-site organisations provided survey returns, representing 38 museums, 39% of the return rate. One multi-site organisation provided information for one of their two sites.

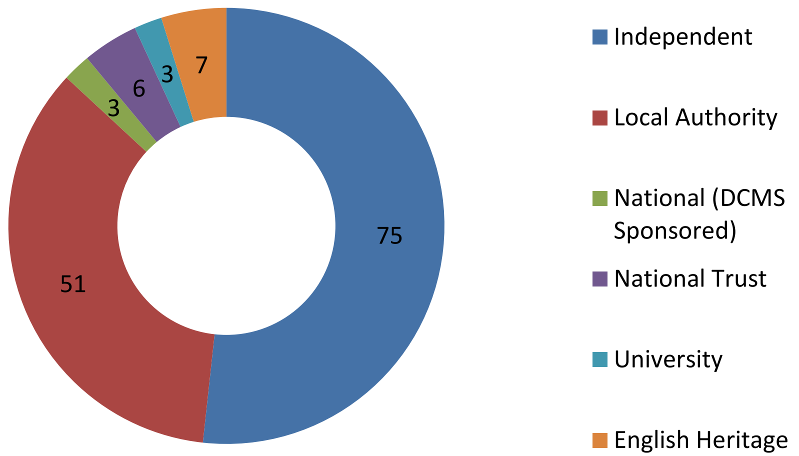
When considering the responses, the following should be kept in mind:

- 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

63% (92) of museums responded to this year's survey. A full list of 2018/19 respondent museums is included at the end of this report. The strong response rate was representative of both the geography and the governance type* of Accredited museums in the Yorkshire and Humber region with 100% returns from National and English Heritage Accredited museum sites and an average of over 50% for other governance types of museums.
** Type of museum used here is defined by the UK Museum Accreditation Scheme.*

Figure 1: All Accredited museums by type

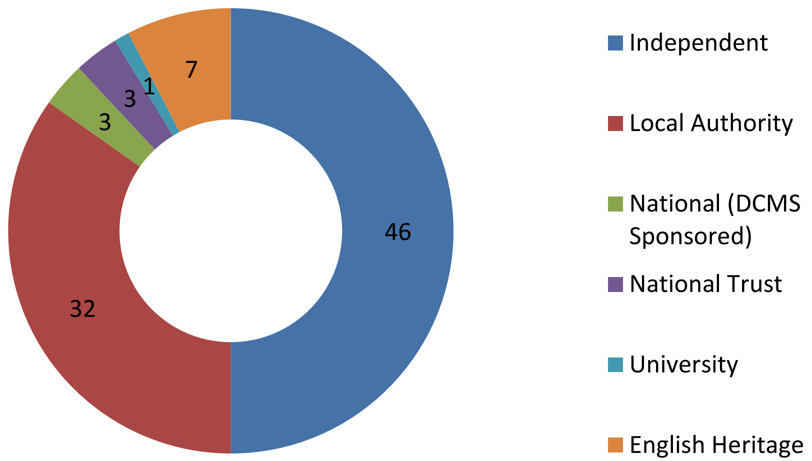


Museum opening arrangements

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

- 61% (56) reported that they were open all year round
- 34% (31) reported that they were closed part of the year as regular seasonal closure
- 1% (1) of museums open by appointment only all year round
- 4% (4) of museums were closed for the year/part of the year for redevelopment, refurbishment and/or repair

Figure 2: All respondent museums by type



Respondents by size

For the purpose of this report the size of a museum has been determined by the reported visit numbers. Four bands provide simple categories 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

Respondent museums demonstrate an interesting mix of museum sizes with the lowest proportion in the 50,000 – 99,999 category and the highest, over a third, of museums designated as Medium with between 10,000-99,000 visitors each year. The 21% of museum respondents in the Extra Large category represent 73% of all visitors reported.
** Byland Abbey, English Heritage was unable to provide audience numbers due to change in arrangements for charging and a redevelopment project on the site. As such a proxy audience category of 'small' has been used for the site to enable inclusion.*

Geographic distribution

There is a strong level of participation in the survey with 63% of Accredited and Working Towards Accreditation museums providing data. Three of the sub regions have provided particularly strong levels of response which can support additional data analysis at sub regional level. Three Local Authority organisations in the East Riding and Northern Lincolnshire were unable to contribute to the survey and as a result the response rate in this area is lower.

Figure 3: Respondents by museum size

Sub-region	Small	Medium	Large	Extra Large
East Riding and Northern Lincolnshire	2	3	1	1
North Yorkshire	11*	15	2	6
South Yorkshire	0	2	5	3
West Yorkshire	9	16	7	9
All region respondents by reported size	22 (24%)	36 (39%)	15 (16%)	19 (21%)

Figure 4: Respondents by sub-region

Sub-region	No. of respondents/no. of Accredited museums	Percentage return rate
East Riding and Northern Lincolnshire	7 of 29	24%
North Yorkshire	43 of 54	63%
South Yorkshire	10 of 19	52%
West Yorkshire	41 of 48	85%

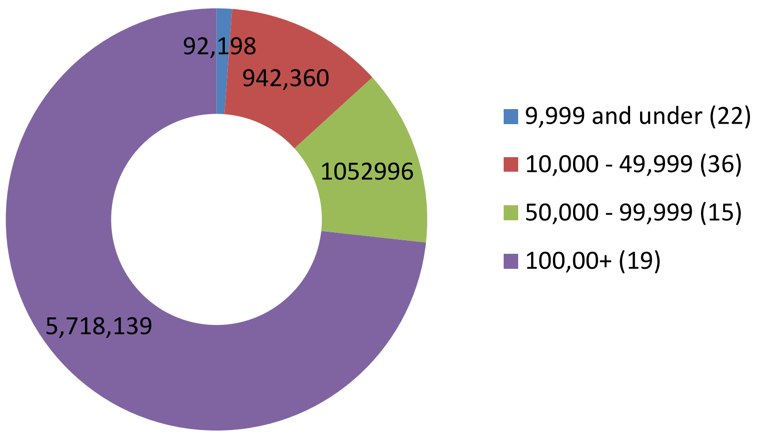
Audiences

Visit figures by museum size

Based on the responses received a total of 7,805,693 visits were made to museums in 2018/19. These responses represent the 63% of museums open to visitors across the year. Data from 2016 and 2017 reported visits of 5.3 million and 5.6 million based an a response rate across organisations of approximately 50%. The overall visit figures are heavily influenced by museums with 100,000+ visitors per annum. As a result, visits to these museums account for 73% of reported visits to the Yorkshire and Humber region. Visits to Local Authority museums also make a significant contribution representing over 40% of all reported visits.

- 19 Extra Large museums received 73% and an average of 300,955 visitors
- 15 Large museums received 14% an average of 70,200 visitors
- 36 Medium museums received 12% and an average of 26,177 visitors
- 22 Small museums received 1% and an average of 4191 visitors

Figure 5: Total visit figures by museum size



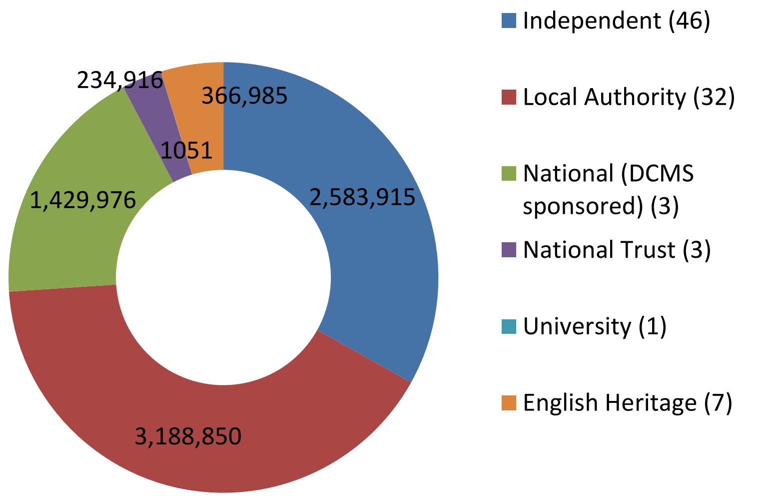
Visit figures by museum type

The distribution of visitors can be further understood by looking at the average number of visitors by museum type:

- 46 Independent museums received an average of 56,172 visitors representing 33% of all reported visits
- 32 Local Authority museums received an average of 99,652 visitors representing 41% of all reported visits
- 3 National (DCMS Sponsored) museums received an average of 476,659 visitors representing 18% of all reported visits
- 3 National Trust museums received an average of 78,305 visitors representing 3% of all reported visits
- 1 University museum reported visit numbers but was closed for part of the year, reporting 1051 visitors
- 7 English Heritage museums received an average of 52,426 visitors representing 5% of all reported visits

87% (80) of museums provided known figures for total visits, whilst less than 3% (12) of museums provided estimated figures.

Figure 6: Total visit figures by museum type



Visit figures by sub-region

Nine of the 19 museums with 100,000+ visits per annum in the region are located in West Yorkshire, two of which are National (DCMS sponsored) museums.

Visits by children

76% (70) of respondent museums provided a breakdown of both adult and child (under 16 but excluding under 5's) visits. 43% (40) of respondents reported known figures for both, whilst the remaining 33% (30) reported estimates.

1,628,418 visits by children were reported by museums in 2018/19. Based on these responses, children accounted for 26% of visits. Once more, museums with 100,000+ visits per annum dominate the total number of child visits reported. The 15 Extra Large museums which provided a break down between adult and child visits reported almost 36% of visitors as under 16. All bar one of these museums provided 'known' figures for the total visit numbers however only six reported 'known' figures for the breakdown between adult and child visits.

It is useful to look more closely at the group of museums 43% (40) reporting actual rather than estimated child visits. Within this group child visits range from 5 - 215,758. The ratio of adult to child visits by size category also presents some insight into the variation of child visits to museums in the region:

- Small museums (n.8) report an adult:child ratio of 87:13
- Medium museums (n.19) report an adult:child ratio of 71:29
- Large Museums (n.4) report an adult:child ratio of 76:24
- Extra Large museums (n.9) report an adult:child ratio of 70:30

Figure 7: Visit figures by sub-region

Sub-region	Total visit figures	Average visit figures	Percentage of regional visit figures / sample
East Riding and Northern Lincolnshire	257,162	36,737	3% (n.7)
North Yorkshire	2,492,271	73,302	31% (n.34)
South Yorkshire	1,078,883	107,888	14% (n.10)
West Yorkshire	3,977,377	97,009	51% (n.41)

Figure 8: Visits by children by museum size

Museum size	Total visits by children	Average visits by children	Sample	Adult, Child ratio of visitors by museum size
Small	8,553	535	16	86:14
Medium	163,500	6056	27	74:26
Large	216,690	18,058	12	75:25
Extra Large	1,239,675	82,645	15	74:26
Totals	**1,628,418**	**23,263**	**70**	**74:26**

Economic impact of visits

In order to estimate the economic impact of visits to museums, the Association of Independent Museum's (AIM) visitor spend calculators have been applied to each sub-region. The results of this calculation are conservative as only the economic impact of 'Local' and 'Day' visits have been used; in order to apply the economic impact of overnight stays a more in depth visitor survey would be required. As a result, the overall economic value of visits is likely to be higher due to the higher levels of visitor spend associated with overnight visits. 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.

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.

Assumed spend values developed in 2014 for each sub-region presented as 'local' and 'day' visitor:

- East Riding and North Lincolnshire -£12.86 and £25.72
- North Yorkshire - £15.34 and £30.69
- South Yorkshire - £14.42 and £28.84
- West Yorkshire - £11.77 and £23.53

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

Sub-region	'Local' visitor assumed spend area value	'Day' visitor assumed spend area value	Gross visitor impact by area
East Riding and Northern Lincolnshire	£881,048	£3,155,370	£4,036,418
North Yorkshire	£9,450,457	£37,586,447	£47,036,904
South Yorkshire	£3,612,889	£15,799,291	£19,412,180
West Yorkshire	£11,278,376	£46,827,087	£58,105,463

Applying this methodology to the visit data provided by museums, the gross visitor impact on Yorkshire and Humber region's economy is shown below:

- £25,222,770 was calculated in 'local' visitor spend based on reported visits
- £103,368,195 was calculated in 'day' visitor spend based on reported visits

Economic impact calculation

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

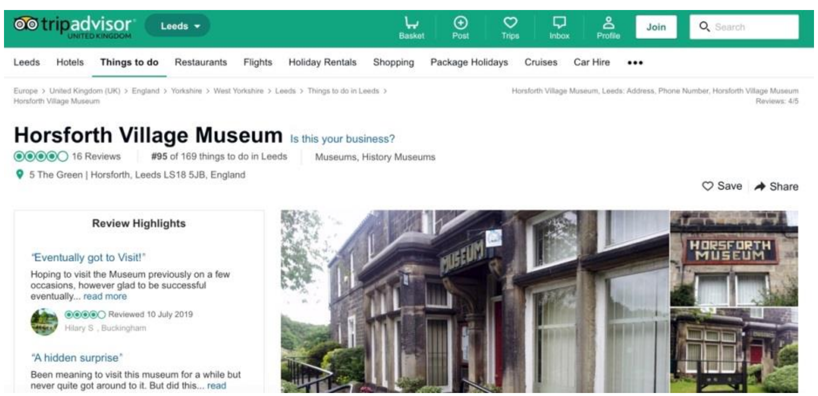
Total adjusted adult visits are estimated to be 2,948,332 based on the adult/child ratio of 86:14 for museums with 9,999 visits and under; 74:26 for museums with 10,000 – 49,999 visits; 74:26 for 50,000 – 99,999 visits; and 74:26 for museums with 100,000+ visits per annum.

Online engagement

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

Websites

68% (63) of respondent museums have editorial control over their website. Seven museums from two multi-sites reported that they did not have editorial control over their own website.   All of these respondents were Local Authority museums and are featured on their local authority's website or, as with the Horsforth Museum, operate a blog and feature on a number of online sites including Culture 24 and Trip Advisor.



6% (4) of museums who reported not having their own website were still able to report the number of unique visits. In total 68% (63) of respondents* provided data on the number of unique visits to their websites, reporting an estimated total of 7,560,087 unique visits in 2018-19. Over 77% (30) of respondents providing data were reporting 'known' figures for unique visits.
** 24 respondents are within multi-sites where data has been distributed across sites and three respondents provided data via the NPO survey which sees data presented as an average over the month which has been aggregated to an annual figure.*

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.

98% (89) of museums stated that they used social media to engage with audiences with platforms including Facebook, Twitter and Instagram most frequently cited. 92% (85) of museums reported an estimated total of 1,350,921 subscribers or followers.

Two small museums located in West Yorkshire within a multi site reported that they did not use social media. However all 92 respondent museums are utilising some form of online platform to engage with their audiences, either through their website or using social media platforms.

Education, sessions and participants

Museums in the Yorkshire and Humber region engaged with 8835 schools and educational organisations based on 80% (74) of respondents Engagement with different schools and formal learning organisations ranged between 1 and 1784 with the median reported as 41 different schools per museum.

- 86%(79) of museums reported a total of 11,528 on-site sessions
- 87% (80) reported a total of 373,085 on-site participants
- 37% (34) of museums reported a total of 693 off-site sessions
- 39% (36) reported a total of 29,612 off-site participants

Whilst the above information considers data from each question independently, recording the number of sessions and accompanying number of participants varies across the respondent museums. Figure 10 details the number of education sessions delivered by museums, both on-site and off-site, during 2018/19 along with the number of participants. Only those reporting data to both questions have been considered here in order to generate an average number of sessions and the accompanying average number of participants.

8% (7) of respondents museums reported that they did not deliver on site educational sessions of which one delivers sessions off-site. The other six museums deliver non formal learning sessions .
42% (39) museums reported that they did not deliver off-site educational sessions. However 29 of these museums do deliver non-formal learning sessions and provided data which is presented on the following page.

- An average of 32 participants to on-site sessions based on data from 79 museums (Extra Large/Large:34, Small/Medium:24)
- An average of 36 participants to off-site sessions based on data from 31 museums (Extra Large/Large:54, Small/Medium:27)

Figure 10: Education, sessions and participants

	Total and sample	Extra Large and Large	Medium and Small
No. of on-site sessions	11528	8949	2579
Average number of sessions	146	280	55
Sample number	n.79	n.32	n.47
No. of participants on-site	369,766	306,109	63,657
Average total participants*	4681	9566	1354
Sample number	n.79	n.32	n.47
No. of off-site sessions	618	218	400
Average number of sessions	20	24	18
Sample number	n.31	n.9	n.22
No. of participants off-site	22,454	11,747	10,707
Average total participants*	724	1305	487
Sample number	n.31	n.9	n.22

Figure 10 notes: Off-site and on-site sessions have been treated independently in order to generate these averages. *The average number of total participants reported per museum. The sample of on-site provision includes data for 10 museums from three multisite organisations. The sample of off-site provision includes data from seven museums from four multisite organisations.

The following museums reported 'known' vs estimated data:

- 53 of the 79 museums for on-site sessions
- 60 of the 79 museums for the number of participants to these sessions
- 18 of the 31 museums for off-site sessions
- 12 of the 31 museums for the number of participants to these sessions

Activities and events, sessions and participants

In addition to the previous education sessions, museums in the Yorkshire and Humber region deliver a wide range of activities and events both on and off-site.

- 74% (68) of museums reported a total of 4000 on-site sessions
- 74% (68) reported a total of 292,759 on-site participants
- 62% (57) of museums* reported a total of 756 off-site sessions
- 64% (59) reported a total of 225,506* off-site participants

- *In addition museums reported a specific event, Bradford Science Festival attracted 34,500 participants and an estimated 207,00 instances of participation. Data for participants is included within the value shown in the summary of findings at the start of this report.*

Five museums reported that they didn't deliver activities or events on-site however three deliver activities and events off site. 17 museums reported that they didn't deliver activities or events off-site.

As outlined in the previous section on educational sessions the above information considers data from each survey question independently. Recording the number of sessions and accompanying number of participants varies across the respondent museums. Figure 11 details the number of activity and event sessions delivered by museums, both on-site and off-site, during 2018-19 along with the number of participants. Only those reporting both has been applied in order to generate an average number of sessions and the accompanying average number of participants.

Figure 11: Activities and events, sessions and participants

	Total and sample	Extra Large and Large	Medium and Small
No. of on-site sessions	3982	2046	1936
Average number of sessions	59	82	46
Sample number	n.67	n.25	n.42
No. of participants on-site	291,459	237,696	53,763
Average total participants*	4350	9508	1280
Sample number	n.67	n.25	n.42
No. of off-site sessions	738	327	411
Average number of sessions	13	16	12
Sample number	n.56	n.21	n.35
No. of participants off-site	87,868	15,315	72,553
Average total participants*	1569	729	2073
Sample number	n.56	n.21	n.35

Figure 11 notes: Off-site and on-site sessions have been treated independently in order to generate these averages. *The average number of total participants reported per museum. The sample of on-site provision includes data for 7 museums from multisite organisations. The sample of off-site provision includes data from 11 museums from multisite organisations.

The following museums reported 'known' vs estimated data to inform Fig.11:
- 44 of the 67 museums for on-site sessions
- 31 of the 67 museums for the number of participants to these sessions
- 34 of the 56 museums for off-site sessions
- 25 of the 56 museums for the number of participants to these sessions

Financial operations

Museums operate across a variety of financial years. Due to these variations in recording and reporting of financial operations the data presented here should be considered a guide, rather than being representative of a specific financial period. 68% (63) of respondents specified that they were providing financial data for 1 April – 31 March

Income

95% (87) of respondent museums reported figures from one or more sources of income for 2018-19 generating £61,358,179

- £32,036,391 in earned income including admissions, retail, catering, events, hospitality, educational and other earned income from trading, e.g. property rental from 87% of respondents (n.80)

Six museums recorded a zero value and two did not provide data.

- £22,078,788 received in regular public funding including Arts Council Major Partner Museum or National Portfolio funding (n.46)

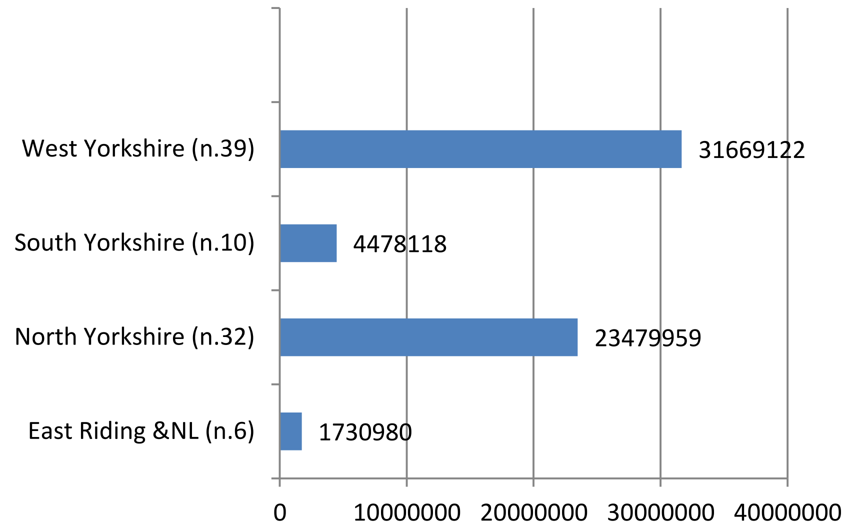
57 museums confirmed they received a regular public subsidy, however 11 museums were unable to provide a breakdown. These museums include seven English Heritage, two Nationals and one Local Authority. As a result the public subsidy reported is awarded to 27 Local Authority museums, £13,204,336, and 17 Independent museums, £8,874,452, in the region.

- £2,648,140 received in grant funding (n.45)

46 museums confirmed receipt of grant funding and 45 provided data on the value of grants. This data was provided by 17 Local Authorities (£652,353), 26 Independent (£1,538,753) and 2 National (£457,034) museums.

- £4,594,860 received in contributed income including all money received in donations, Friends members/schemes, any sponsorship income, corporate membership and other non-earned income (n.76)

Figure 12: Total generated income by sub-region



It is also helpful to present the average, as well as the total, income generated by size of museum:

- £1,239,303 generated by museums with 9,999 or under visits per annum and an average income of £65,226 (n.19)
- £7,212,405 generated by museums with 10,000 – 49,999 visits per annum and an average income of £206,069 (n.35)
- £9,566,521 generated by museums with 50,000 – 99,999 visits per annum and an average income of £637,768 (n.15)
- £43,339,950 generated by museums with 100,000+ visits per annum and an average income of £2,407,775 (n.18)

Total income by charging model and museum type

Museums who charged admission reported a total income of £29,527,055 (n.48) whilst museums whose admission is free reported a total income of £27,524,626 (n.34). A further museum provided data which has not been published due to being the only return within its category.

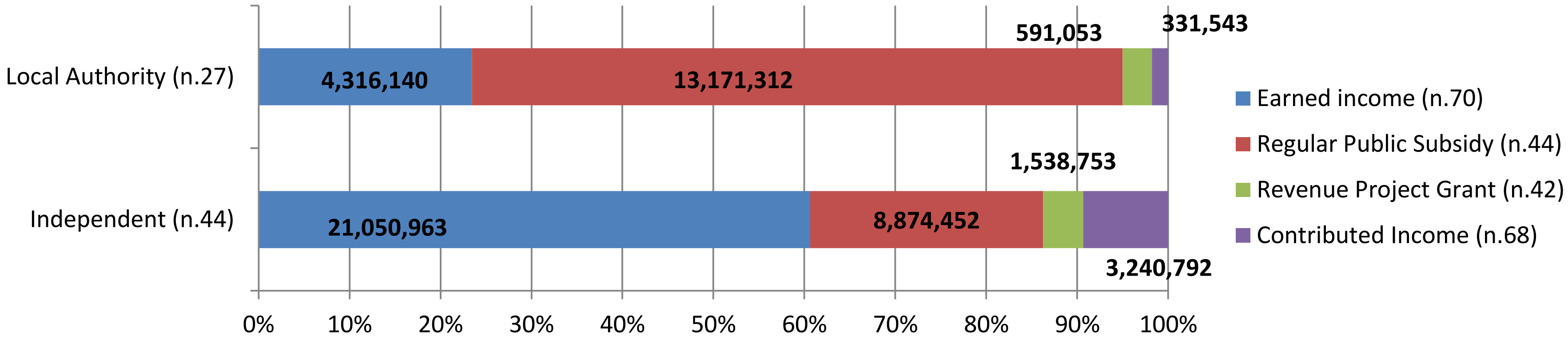
Breakdown of income

The following breakdown of income generated by museum type considers only those museums in the group of 87 museums providing both confirmation of income sources and income data (where applicable) across all four categories of income. The following information is intended to provide an insight in the distribution of income across the sector in Yorkshire and the Humber region. 75 museums provided sufficient information across the categories generating a total income of £54,412,689. However due to National Trust providing information for 3 museums and University for one museum, the breakdown below considers the responses from 27 Local Authority museums and 44 Independent museums generating a total of £53,115,008. A total of 71 museums report one or more sources of income.

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
All	£29,527,055	48	£27,524,626	34
English Heritage	£1,308,700	6	NA	
Independent	£20,956,314	31	£10,121,150	11
Local Authority	£5,972,360	8	£11,993,103	21
National Trust	£1,289,681	3	NA	
National	NA		£5,410,372	2

Figure 14: Breakdown of generated income by museum type. Numbers (n.) of museums providing data within each income category are indicated in legend.



Admission charges

99% (91) of respondents provided information on admissions:

- 53% (48) permanently charged admission
- 5% (5) charged only seasonally or for some exhibitions
- 42% (38) offered free admission all year round

53% (48) of museums who charged admission, including those who charged seasonally or for some exhibitions, reported their admissions income, which totalled £11,183,469. The admission charge for an adult ticket ranged between £2 and £13. The admission charge for a child ticket ranged between £1 and £9.

Across the 49 museums reporting adult admission charges, the average adult admission charge was £6 across the group. Four museums charging adult admissions reported that they do not charge for child visits.

80% (36) of museums charging adult and child admissions provided information on total admissions income. One of the 36 museums charges for some exhibitions/seasonally.

The museums who provided free entry to children included one museum in the 9,999 and under category and three museums in the 10,000 -49,999 category.

Figure 15: Average adult admission charges by museum size

Sub-region	Average adult admission charge	Sample
9,999 and under	£4	8 of 49
10,000-49,999	£6	24 of 49
50,000 -99,999	£7	11 of 49
100,000+	£10	6 of 49

Figure 16: Average child admission charges by museum size

Sub-region	Average child admission charge	Sample
9,999 and under	£3	5 of 36
10,000-49,999	£4	19 of 36
50,000 -99,999	£4	8 of 36
100,000+	£6	4 of 36

Retail income

87% (80) of respondent museums in the Yorkshire and Humber region confirmed that they have a shop or a retail space. One museum did not provide an answer to the question. Based on the data from the 71 museums who reported retail revenue, the total retail income for 2018-19 was £6,052,780. 57 of the 71 museums submitting retail revenue reported actual rather than estimated data.

The average retail spend per head is an important indicator used to assess the effectiveness of a museum's retail offer; the above 77% (71) of museums provided the required data for this to be measured. The average retail spend per head across all museums providing retail spend and visitor data is £1.40.

Figure 17: Average retail spend per head by museum size

	Average	Lowest	Highest	Sample
9,999 and under	£1.793	0.055p	£11.547	15
10,000 – 49,999	£1.392	0.205p	£5.657	28
50,000 – 99,999	£1.356	0.140	£6.187	12
100,000+	£1.084	0.017p	£2.593	16

Catering income

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

- 35% (32) had an in-house café/refreshment facilities of which 26% (24) reported generating a total income of £3,336,589. Two of these museums were part of multisite organisations.
- 18% (17) contracted out their café/refreshments of which 15% (14) reported generating an income of £593,887. Two of these museums were part of multisite organisations.
- A total of £3,930,476 was reported in income from catering across 41% (38) museums in the region.

If an estimated income of £139,025 per museum with in-house catering and an estimated income of £42,421 per museum is applied to all respondents confirming catering facilities we can generate a total catering income for 63 of the sector as £5,169,957.

Figure 18: Average retail spend per head by charging model

	Average	Lowest	Highest	Sample
Free admission	0.538p	£0.017p	£2.593	27
Charged admission	£1.834	0.149p	£11.547	40
Charge seasonally or for some exhibitions	£2.900	0.335p	£8.945	4

Donations

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

79% (73) of museums provided information on their income from donations generating over £2,222,540 and ranging between £118 and £650,166. The lowest value for donations per head was 0.002p, whilst the highest was £37.89. A further two museums reported that they could not provide the value of donations collected by the museum.

Figure 19 presents the total and average donations by museum size. Within the museum size category 9,999 and under there are three museums reporting significantly higher level of income from donations and the general visiting public. If the data was considered without the three museums; the range reported would be between 0.033p and £5.261 with an average total income from donations across the group of £2262 per annum.

Figure 20. Within the free admission category one national museum is reporting significantly higher levels of income from donations and other monies from the general visiting public. If the data was considered without this museum; the average annual income reported would be reduced to £298,684 per museum. Of the 42 organisations that reported charged admission 37 provided information on donations income. Within the free admission category one Extra Large independent reported significantly higher levels in donations income. If the data was considered without this museum the average total income across the group would be £18,239.

Figure 19: Average donations spend per head by museum size

	Average annual income / Per head	Lowest	Highest	Total across Group	Sample
9,999 and under	£13,993 £5.068	£0.033	£37.889	£209,902	15
10,000 – 49,999	£5931 0.407p	£0.011	£3.031	£172,001	29
50,000 – 99,999	£11,241 0.206p	£0.012	£1.411	£134,890	12
100,000+	£100,338 0.527p	£0.002	£3.867	£1,705,746	17

Figure 20: Average donations spend per head by charging model

	Average Annual income / per head	Lowest	Highest	Total across Group	Sample
Free admission	£28,753 0.458p	0.007p	£5.261	£948,850	33
Charged admission	£25,550 £2.148	0.002p	£37.889	£945,362	37
Charge seasonally or for some exhibitions	£109,443 £1.549	£0.071p	£3.867	£328,328	3

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 £36,751,225 of direct, indirect and induced impacts in the Yorkshire and Humber region as a result of spending on goods and services by museums during 2018-19.

This calculation is based on museum expenditure figures, excluding staff spend, from 77% (71) 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.

32% (29) of museums specified that they had received capital investment in 2018-19, totalling £3,609,369. In addition a significant 2.5million capital allocation was made to the National Science and Media Museum and National Railway Museum representing a capital investment of over six million in the region.

Figure 21: Direct, indirect and induced impact of spend on goods and services by sub-region

Sub-region	Value	sample
East Riding and Northern Lincolnshire	£579,905	4
North Yorkshire	£15,172,166	24
South Yorkshire	£3,295,368	9
West Yorkshire	£17,703,786	34

Expenditure and staff costs

68% (63) 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. These museums reported a total expenditure on staff costs in 2018-19 of £28,613,664 and an average of £454,185 across the group.

For the purposes of comparison within categories, two museums' data and one museum service has been omitted due to anomalies between expenditure.

On average, across the 63 respondent museums, spending on staff accounted for 49% of total expenditure.

- Museums in the category of 9,999 and under spent an average of 39% on staff costs
- Museums in the category of 10,000-49,999 spent an average of 54% on staff costs
- Museums in the category of 50,000-99,999 spent an average of 48% on staff costs
- Museums in the category of 100,000+ spent an average of 49% on staff costs

It is worth noting that museums which operate within organisations that deliver wider services, such as local authorities, national organisations are less able to attribute staff costs, particularly those related to centrally provided services such as finance, HR, legal and IT support, to individual museums. As a result it is reasonable to conclude that the true cost of staffing, as a percentage of total expenditure within these museums, may be higher than reported.

* Within figure 22 the sample of 63 museums includes reporting from 25 museums within six multisite organisations.

Figure 22: Average expenditure on staff by museum type

	Average expenditure on staff	Average total expenditure	No. of responses by size and type
9,999 and under	42907	108,777	10 of 63*
10,000 – 49,999	117,171	218,732	28 of 63
50,000 – 99,999	353,441	755,374	8 of 63
100,000+	1,298,603	2,646,031	17 of 63
Independent	899,773	435,026	33 of 63
Local Authority	313,784	558,479	26 of 63
National (DCMS sponsored)	2,719,882	6,355,730	2 of 63
National Trust	329,825	656,695	2 of 63

Equality, Diversity and Inclusion

Museums were also asked an additional question whether or not they had an Equality and Diversity Action Plan (EDP). 78% of LA and 66% of Independent museums confirmed they had an EDP:

- 70% (64) reported that their museum organisation did have an EDP
- 24% (22) reported that their museum organisation did not have an EDP
- 3%(3) of respondents reported that they did not know
- 3% (3) of respondents did not provide an answer

Workforce – Paid Staff

97% (89) of museums confirmed if they employed staff. 11 (12%) of these reported that they did not employ paid staff at the museum site. This includes one local authority multi-site organisation and one English Heritage site. 78 (88%) of these museums confirmed that they had paid staff.

Museums were asked to provide information on both the total head count of staff employed by the museum, at its peak in the year, and the number of Full Time Equivalents (FTE) during 2018-19. The following 84% (77) of respondent museums provided data on both of these questions. 35 of the 77 museums are reporting data as part of 10 multi-site organisations. 45% (35) reported actual figures for paid staff head count, whilst the remaining 53% (41) reported that their figures were estimates and one did not provide an answer.

- The 77 respondent museums employed a total of 2000 paid staff
- The 77 respondent museums employed 1269 FTE paid staff

There are considerable variations in the numbers of staff across the sector which can be further understood by looking at multisite and single site responses separately:

- 9 multisite representing 21 Accredited museum sites employ 525.70 FTE (728 posts); 41% of the total number of all reported FTE
- 42 sites employ 742.88 (1272 posts) FTE; 59% of the total reported FTE

However it is useful to highlight, two of the above 42 museums account for over 43% (317.65 FTE) of the total FTE reported by individual Accredited museum sites.

Range of total head count

- 58% (45) reported between 1 – 10 paid members of staff, based on figures provided for total head count
- 18% (14) reported between 11 – 30 paid members of staff
- 10% (8) reported between 31 – 50 paid members of staff
- 6% (5) reported between 51 – 71 paid members of staff
- 6% (5) reported that they employed over 110 paid members of staff, the highest number reported being almost 300

Employment impacts: Using the AIM Economic Impact Toolkit we can estimate the value of museum employees to the Yorkshire and Humber regional economy:

- These 77 sample museums created 2131 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.

- Museums reported a total of 3892 volunteers, based on the responses of 93% (86) of museums; an average of 45 volunteers across the group
- This ranged from 1 to 276 volunteers per museum
- 12% (11) of museums reported that they are entirely volunteer run
- The total number of volunteer hours recorded was 369,834 by 93% (86) of respondent museums
- 27% (23) of the above museums reported actual figures for volunteer hours, whilst 73% (63) reported estimates.
- All reported volunteer hours equate to 130 Full Time Equivalent posts

Volunteer hours are estimated to have contributed around £1,430,223. This value is considered conservative as it is based on a calculation of £50 per day using guidance issued by the Heritage Lottery Fund (now National Lottery Heritage Fund). A more detailed assessment could attribute a percentage of these volunteers to a higher day rate, if additional information was available, and significantly increase the value of volunteering within museums in the region.

Definitions and methodology

Deadweight
Value or impact that would have occurred without the museum

Direct effects
Actual jobs and spending created by a museum

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

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

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

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

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

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

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

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

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

Bibliography

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

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

Museum Development Yorkshire support

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

'The support received from MDY, both financially by way of small grants, or by advice via the M.D. Officer or through forum meetings has been truly splendid. To continue membership of MDY.'

'We received positive support and advice from Museum Development Yorkshire on Museum and Staff development, Succession Planning and Governance issues.'

'The support we have received from Museum Development Yorkshire over the period has been invaluable. In particular, the training we were able to secure following the award from the Front of House Implementation Fund really helped to kick start the cultural change that was needed to complement our National Lottery Heritage Funded [] project. We have also benefited from advice and support [] which was really helpful at a critical time for the Museum. [] Alongside this, the workshops, Visitor Experience Consortium and mentoring opportunities facilitated by MDY that the Museum's cross departmental staff/volunteer team were able to participate in really made a positive difference, with our findings are being taken forward and implemented.'

'We were extremely grateful to have received Museum Development Yorkshire support in the form of a series of curatorial workshops regarding the interpretation of our collection. This has proved invaluable in our preparations for a museum improvement scheme to mark the Society's bicentenary in 2023.'

'Very useful advice from [] MDY on who to approach for help during our Collection relocation process.'

Yorkshire Museum Development team 2019

With thanks to the following museums for participating

East Riding and Northern Lincolnshire

Burton Constable Hall
Fishing Heritage Centre
Hedon Museum
The North Holderness Museum of Village Life
The Ropewalk
The Stewart Museum
Withernsea Lighthouse Museum

North Yorkshire

Aldborough Roman Town (English Heritage)
Beck Isle Museum of Rural Life
Beningborough Hall
Byland Abbey (English Heritage)
Captain Cook Memorial Museum
Craven Museum and Gallery
Dales Countryside Museum
Georgian Theatre Royal
Helmsley Castle (English Heritage)
Kiplin Hall
Malton Museum
Merchant Adventurers' Hall
Museum of North Craven Life
National Railway Museum
Pannett Art Gallery
Richmond Castle Museum (EH)
Richmondshire Museum
Rievaulx Abbey (English Heritage)
Royal Dragoon Guards Museum
Ryedale Folk Museum
Shandy Hall
The Green Howards Regimental Museum
The Kohima Museum
The Quilters' Guild Collection
Thirsk Museum
Treasurer's House, York
Whitby Abbey (English Heritage)
Whitby Museum
York Museums Trust:
York Art Gallery, York Castle Museum
Yorkshire Museum and Gardens
York Archaeological Trust:
Barley Hall, Dig, Yorvik Viking Centre

South Yorkshire

Brodsworth Hall (English Heritage)
Clifton Park Museum
Ken Hawley Collection
South Yorkshire Aircraft Museum
Sheffield Industrial Museum Trust:
Abbeydale Industrial Hamlet
Kelham Island Museum
Barnsley Museums:
Cannon Hall Museum, Experience Barnsley
The Cooper Gallery,
Worsbrough Mill Museum

West Yorkshire

Bradford Museums and Galleries
Bolling Hall Museum, Bradford Industrial Museum
Cartwright Hall Art Gallery, Cliffe Castle Museum
Calderdale Museums
Bankfield Museum, Heptonstall Museum
Shibden Hall, Smith Art Gallery
Kirklees Museum and Galleries
Bagshaw Museum, Huddersfield Art Gallery
Oakwell Hall Country Part, Tolson Memorial Museum
Leeds Museums and Galleries
Abbey House Museum, KirkstallAbbey,
Leeds City Art Gallery, Leeds City Museum,
Leeds Industrial Museum at Armley Mills,
Leeds Museum Discovery Centre, Lotherton Hall,
Temple Newsam House, Thwaite Mills Watermill Museum
Leeds University Library Galleries
ULITA: An Archive of International Textiles
Wakefield Museums and Galleries
Castleford Forum Museum, Pontefract Museum
Wakefield Museum

Bradford Police Museum
Bronte Parsonage Museum
Colne Valley Museum
East Riddlesden Hall
Hepworth Wakefield
Horsforth Museum
Ingrow Loco Museum
Middleton Railway Museum
Museum of Rail Travel
National Coal Mining Museum for England
National Science and Media Museum
Peace Museum
Royal Armouries, Leeds
Thackray Medical Museum
Yorkshire Cricket Museum
Yorkshire Sculpture Park

Notes

Of the 150 Accredited museums (as of June 2019) the following museums were recorded as permanently closed: Dewsbury Museum and Gallery (AN1065), Otley Museum and Archive (AN1234), Red House Museum (AN1068) and Yorkshire Waterways Museum (AN202)
In addition Spurn Lightship (AN1215) was recorded as temporary closure.

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www.southwestmuseums.org.uk

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