SHARE Museums East

Annual Survey of Museums 2016-17

Norfolk Museums

SHARE Museums East
a network of know how

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ARTS COUNCIL ENGLAND

Foreword

The response to the 2016-17 East of England Benchmarking survey is the best ever, with over 74% of Accredited museums in the region contributing. This means that we have a very robust set of data on which to base our understanding and our future planning.

In this report you will find some truly impressive statistics. The economic impact of museums in the region is now £80m per annum. Museums create over 1,000 jobs. Over 6,000 volunteers gave time worth nearly £6m to the sector.

And there are some encouraging trends. The total number of visitors to museums has remained broadly stable since 2015-16. More museums – 92% – now use social media to engage their audiences, a figure well above the national average. Museums are getting better at income generation with earnings from retail, donations and fundraising increasing since last year's report. Volunteer numbers are increasing, too.

All of this pays tribute to the work of SHARE, SHARED Enterprise and our partners' programmes, such as Cambridgeshire County Council's *Strengthening the Workforce in Museum* (SWIM) project or Luton Culture's *Museum Makers*.

Of course, not all in the garden is rosy. The total number of paid staff in museums are declining. Income for some museums is also in decline. However, through the intelligent use of the data in this survey, we can determine where our strengths and weaknesses lie and, therefore, what are our opportunities are.

Most of all, thank you to everyone who contributed to the 2016-17 Benchmarking survey. Your input has made a real difference.

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

Summary of 2016-17 findings

Response rate
- 134 museums responded to the survey. This equates to a 74% response rate from museums within the Accreditation scheme.

Audiences
- There were a total of 3,606,169 visits to museums in 2016-17 based on responses received.
- Visits to museums are down by 1.3% on 2015-16 based on a constant sample.
- Children (under 16s) accounted for 31% of all visits.
- Museums held 4,666 activities and events and engaged 310,161 participants.

Economic impact
- Known visits to museums had a gross impact of £60m in the visitor economy.
- There was at least £19.9m of direct, indirect and induced impacts as a result of museums spend on goods and services.
- Museums created 1,022 full time equivalent direct, indirect and induced jobs across the region.

Online engagement
- 96% of respondent museums have their own website and 92% use social media to engage with audiences.

Educational engagement
- Museums delivered 6,987 learning sessions on-site and engaged 229,341 participants and 1,708 outreach sessions which reached 70,897 participants.

Financial operations
- 54% (88) normally charge for admission, 41% (67) offer free entry all year and 4% (7) charged for some exhibitions/ seasonally.
- On average, earned income accounted for 25% of all income, public subsidy 38%, grants 19% and 18% in contributed income (donations, bequests, sponsorships etc).
- £9.6m was generated in earned income.
- £14.7m received in regular public subsidy.
- £7.4m received in grant funding.
- £7.2m received in contributed income.

Workforce – volunteers
- There were 6,608 volunteers which equates to 446 full time equivalents.
- On average, museums had 57 volunteers each.
- Volunteers contributed a total of 812,366 hours to museums.
- Each volunteer contributed an average of 108 hours in the year.
- Volunteer time was worth £5.8 million to museums.

Workforce – paid staff
- Museums employed 915 paid staff which equated to 710 full time equivalents.
- 31% of museums (36 of 115) were entirely volunteer-run with no paid staff.
- Based on information provided, volunteers outnumber paid staff by just over 7:1.

Introduction

'Benchmarking in the East of England' is an annual survey aimed at museums in the region that are within the Arts Council Accreditation scheme. This report presents the findings of the 15th Benchmarking survey.

The survey is conducted to provide an up to date annual overview of the museums sector in the region.

Findings help contribute to estimates of the social and economic impacts of museums in the East of England and inform how SHARE Museums East delivers support to museums.

For the second year, the survey was undertaken in collaboration with the national Museum Development Network in England with the intention of providing consistent data capture across multiple regions to enable more effective advocacy and benchmarking.

Survey method

The survey was sent to all 168 museums in the East of England that are Accredited or officially working towards Accreditation, as well as being promoted via the regional MDO network. Museums were given the option of either online completion or a Word version of the survey. Museums were asked to provide data for the 2016-17 financial year (1 April – 31 March).

The survey was divided into four sections:

- Audiences
- Educational engagement
- Financial operations
- Workforce

Multi-site organisations were given the option to either provide a response as a whole organisation or by individual site. A number of multi-site museums submitted mixed responses with some data provided on a site by site basis and other data provided at a whole organisation level. Where this is the case it will be highlighted.

Sample and response

There were 134 responses to the survey overall, up from 129 last year. 125 museums in the Accreditation scheme responded to the survey which equates to a 74% response rate, up from 72% last year. This includes museums that are Accredited, Provisional or formally Workings Towards Accreditation. The relatively high response rate of means that the figures and conclusions drawn in this report can be considered broadly representative of museums in the region. There were no responses from Accredited English Heritage or National Trust properties which is likely to have a significant impact on the scale of the sector indicated by the survey results. When considering the responses, the following should be borne in mind:

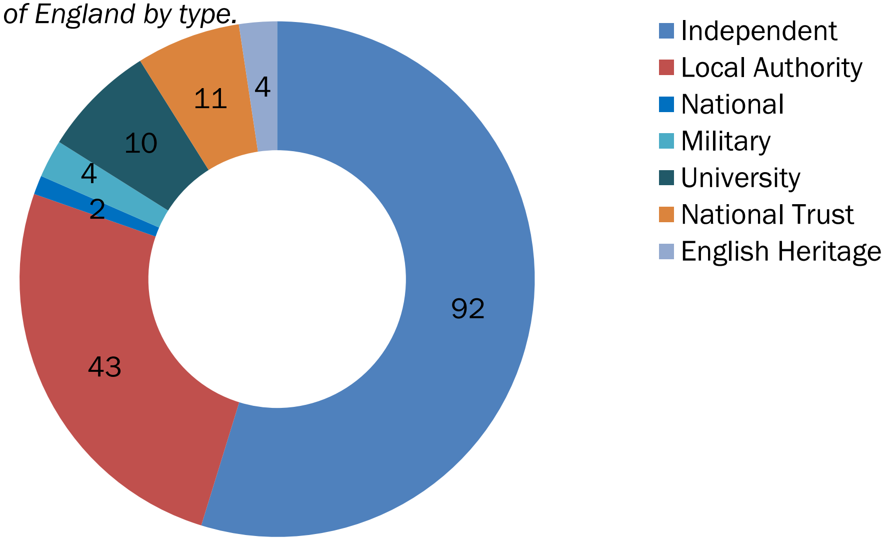
- Not all museums responded to every question.
- 'All' museums is every museum which submitted a return, including non-Accredited museums.
- Where differences are small and response levels low, care must be taken when interpreting the data.

Categories of museum

Three main categories of museum are used for analyses throughout the report:

- Type of museum – determined by funding source and governance model.
- Size of museum – determined by annual visit figures. Small (under 10,000), Medium (10,000-49,999), Large (50,000+).
- Core group – museums that have responded to 'Benchmarking' in 2013-14, 2015-16 and 2016-17.

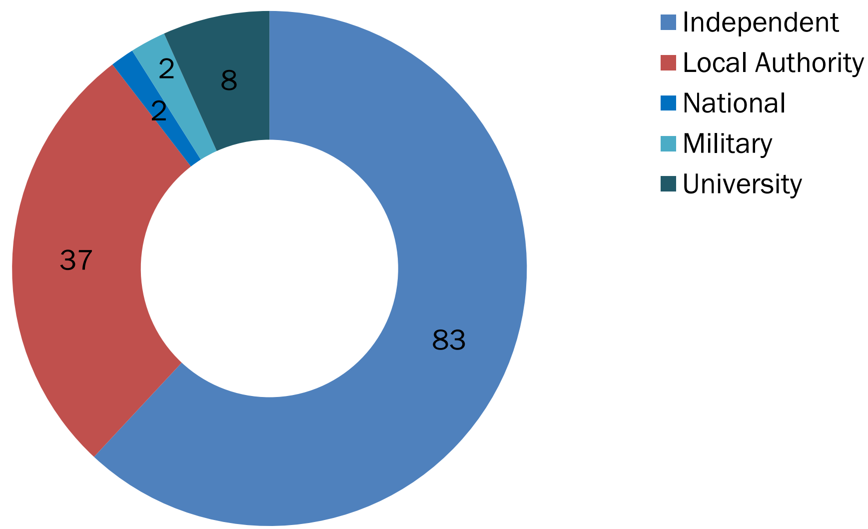
Figure 1: Museums in the Accreditation scheme in the East of England by type.



Profile of respondents

With the exception English Heritage and National Trust properties, none of which responded to the survey, the responses are broadly representative of museums in the East of England. A full list of the museums which returned the survey is included at the end of this report.

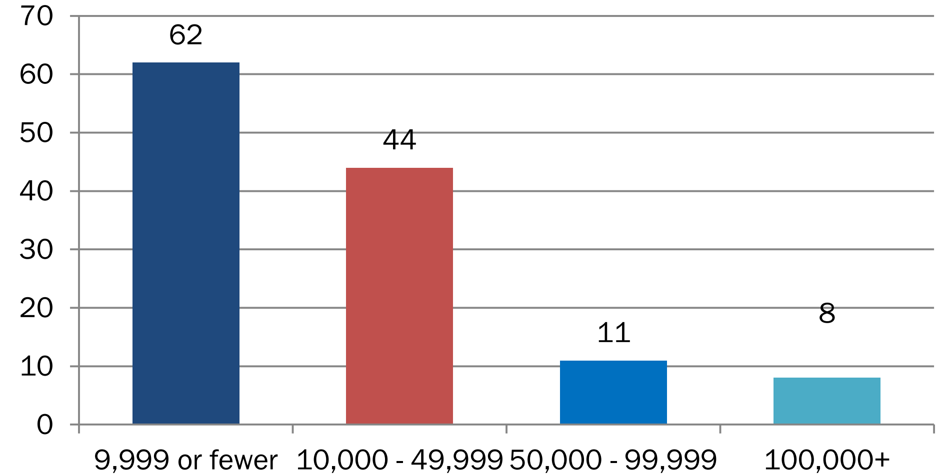
Figure 2: Profile of respondent museums by type.



Respondents by size

Museums in the East of England range from large national museums to small community organisations. For the purposes of this report, the size of museums has been determined by the average annual number of visits they attracted across 2015-16 and 2016-17. Over half of the respondents that were open in 2016-17 (63 of 127) received fewer than 10,000 visits per year, highlighting that the sector in the region is dominated by a large number of small organisations. Two museums did not provide visit figures for 2016-17, so have been categorised based on their 2015-16 figures. Six museums were closed for redevelopment in 2016-17 and have not been included in Figure 3.

Figure 3: Respondents by size based on visit numbers.



Geographic distribution

As Figure 4 shows there were considerable differences in the response rates between the counties ranging from 100% in Bedfordshire to 65% in Essex.

Figure 4: Respondents by county.

	Accredited responses/ Accredited museums	Percentage return
Bedfordshire	9 of 9	100%
Cambridgeshire	27 of 36	75%
Essex	20 of 31	65%
Hertfordshire	20 of 24	83%
Norfolk	23 of 33	70%
Suffolk	26 of 35	74%
Total	125 of 168	74%

Museum opening hours

Museums were asked to provide details of typical opening hours:

- 62 (49%) were open all year round.
- 57 (45%) were closed for part of the year as part of a regular seasonal closure.
- 4 museums were closed for part of the year for reasons such as refurbishment or repairs.
- 4 museums were open by appointment only all year.
- 6 museums were closed for redevelopment all of the year.

Audiences

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

Total visit figures

Based on the responses received there was a total of 3,606,169 visits to museums in 2016-17. This includes 2,720 visits to museums listed as closed for redevelopment which are not reflected in Figure 5. This represents a 1.3% decrease based on a constant sample of 100 museums that provided visit data for both 2015-16 and 2016-17 and had normal opening hours in both years. Museums were asked whether the visit figures they provided were actuals or estimates. There were 120 responses to this question, 70% (86) provided actual figures while the remaining respondents provided estimates. This is slightly down on last year when 76% (92 of 121) provided actuals.

Visits by children

The survey asked museums to provide a breakdown of visits into adults and children (under 16) and 117 museums provided this information. There were 955,458 visits by children in 2016-17 representing no change on 2015-16, based on a constant sample of 87 museums. Children accounted for 31% of all visits, up from 30% last year. There were some significant variations depending on the size of the museum with children making up 25% of visits to small museums, 31% for medium museums and 32% for large museums.

Figure 5: Total visits to museums by size.

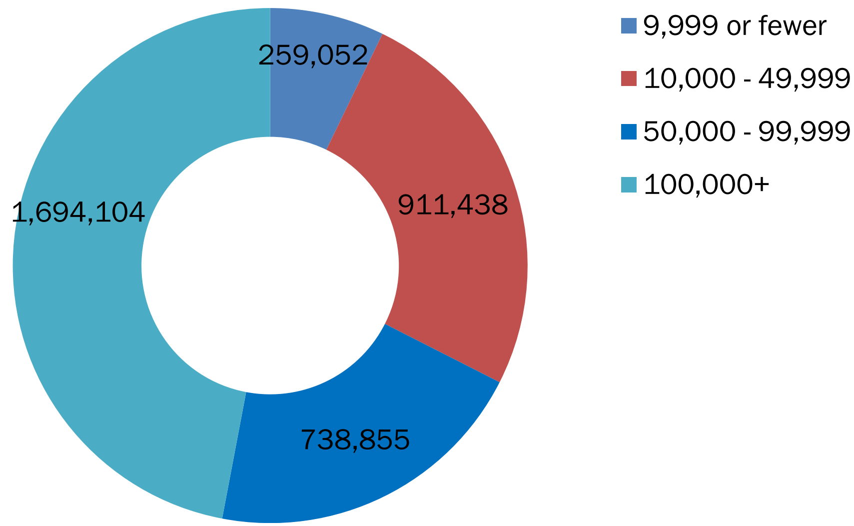
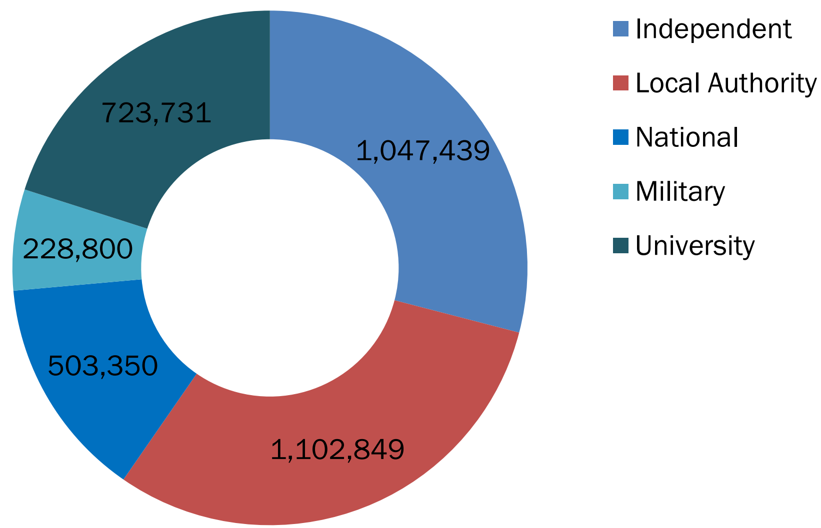


Figure 6: Total visits to museums by type.



Total visits by county

Overall visits to museums in the East of England were down by 1.3% on last year. This is based on a core group of 100 museums that provided data for both 2015-16 and 2016-17.

The core group excludes museums that had closures in either years outside of their normal opening pattern e.g. if they were closed for redevelopment.

While visitor numbers decreased slightly overall Hertfordshire experienced a significant increase in visit numbers. Museums were asked if there were any reasons for any significant changes in visit figures however for most museums changes were very small and so very few museums provided any explanation.

Where audience figures are up or down at county level, reasons for this are not always straightforward and fluctuations are often influenced by the relative size of the museums in the constant sample. In a county where there are a relatively high number of small and medium size museums, small fluctuations in visit figures will have a disproportionately large effect on the overall percentage change in comparison to counties with larger museums where small changes will have less of an impact.

Overall there is a mixed picture in terms of visit figures. 27 museums reported an increase in visit figures between 2015-16 and 2016-17, while 45 museums reported a decrease and two museums reported no change.

Figure 7: Total visits to museums by county.

	Total visits 2015-16	Total visits 2016-17	% change (constant sample)
Bedfordshire	304,449	288,667	+0.2%
	number = 6	*n = 8*	*n = 5*
Cambridgeshire	1,491,429	1512412	-0.8%
	n = 26	*n = 25*	*n = 22*
Essex	373,375	354,160	-4.7%
	n = 21	*n = 23*	*n = 15*
Hertfordshire	388,883	422,402	+8.3%
	n = 18	*n = 18*	*n = 14*
Norfolk	537,237	588,756	-4.1%
	n = 23	*n = 25*	*n = 19*
Suffolk	443,268	439,762	-7.2%
	n = 29	*n = 28*	*n = 25*
East of England Total	3,538,641	3,606,169	-1.3%
	n = 123	*n= 127*	*n = 100*

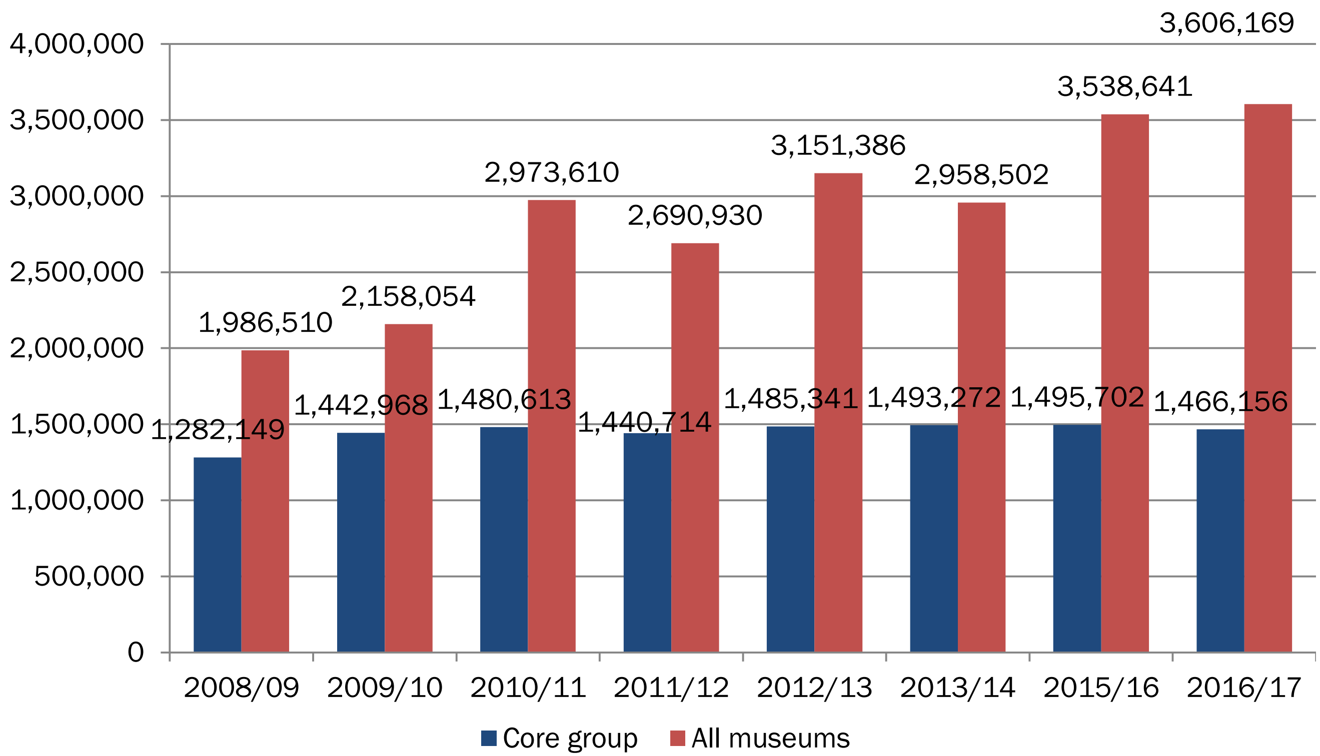
Total visits – change over time

Since 2008-09 total visits to museums in the East of England have grown significantly. Figure 8 shows both total visits to all museums that responded to previous Benchmarking surveys and the total number of visits to a constant sample of museums that responded to every Benchmarking survey since 2008/09.

Based on the constant sample of 47 museums, visits to museums have increased by 14.4% between 2008-09 and 2015-16. The constant sample excludes museums where it is known that they had closures outside of their normal opening pattern e.g. if they were closed for redevelopment for either part of all of the year.

The fluctuations in total visits to all museums reflects the fact that the numbers of museums responding to Benchmarking has varied year on year.

Figure 8: Average visits to museums since 2008/09.



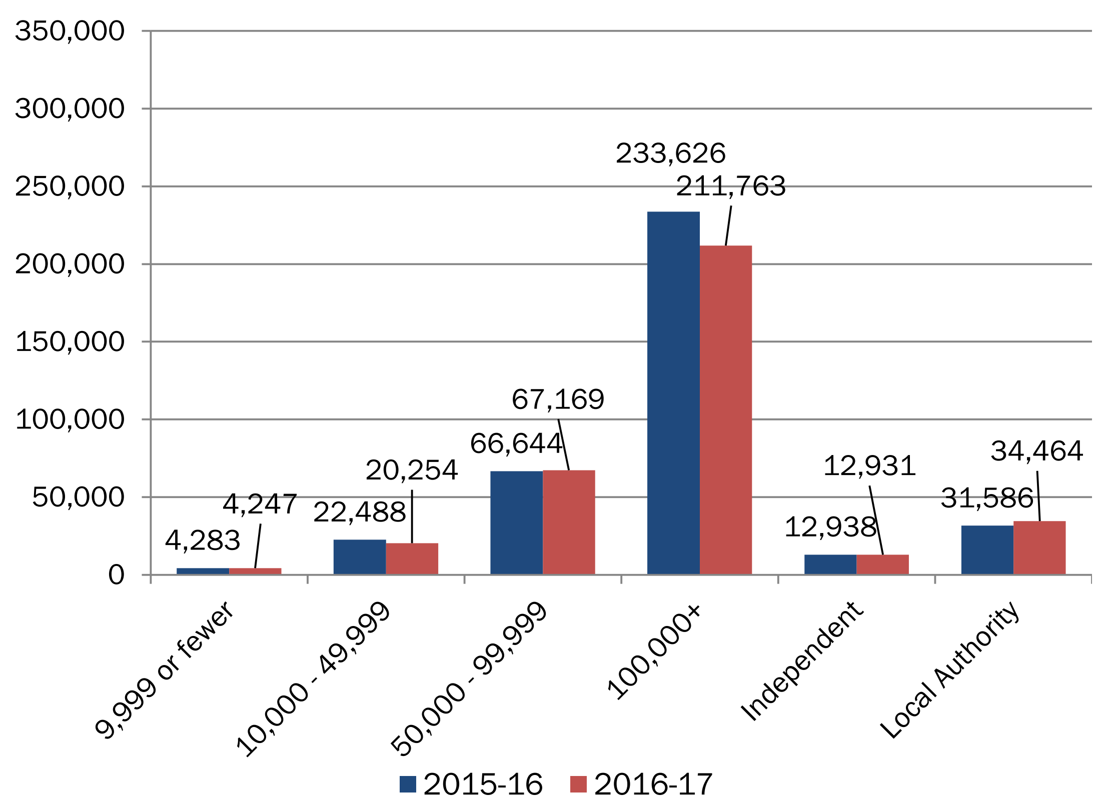
Average visits to museums in 2016-17 by size and type

The importance of visits to museums is of course relative to the size and scope of any particular museum. However, the number of in-person visits is one of the main indicators of the popularity, and in many ways, the success of museums.

Comparing the average number of visits to museums of a particular size can provide a useful starting point for museums to be able to benchmark their performance and in providing a wider sector context to an individual museum's own operations.

There were insufficient sample sizes to provide average visit figures for English Heritage, military, higher education, national or National Trust museums.

Figure 9: Average visits to museums by size and type .



Economic impact of visits

Museums make an important contribution to the regional economy creating a range of economic benefits, particularly in helping to attract tourism. Three of the top 10 most visited attractions in the East of England were museums in 2016 according to Visit England. The Association of Independent Museums has published an Economic Impact Toolkit which 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 provide an idea of this economic value at an aggregate level. The gross visitor impact was £60,099,206 in the East of England economy in 2016-17 based on the visit data provided by museums.

Figure 10: Gross visitor impacts by county 2016-17

	Average spend assumption (local visitor)	Average spend assumption (day visitor)	Total value of visits
Bedfordshire	£8.90	£17.79	£2,910,901
Cambridgeshire	£17.99	£35.98	£31,158,372
Essex	£12.91	£25.82	£5,129,234
Hertfordshire	£11.29	£22.59	£5,359,986
Norfolk	£14.08	£28.16	£9,318,659
Suffolk	£12.86	£25.73	£6,192,054
Total			£60,069,206

Economic Impact Calculation

- This calculation takes the number of adult visits to a museum, establishes the proportion of local, day and overnight visits and multiplies these by average visitor spend assumptions developed by DC Research from regional and national tourism datasets.
- Total estimated adult visits is based on the adult:child ratio of 75:25 for small museums, 69:31 for medium and 68:32 for large museums.
- Actual ratios for local, day and overnight visits were not available from museums so the average ratios developed by DC Research have been used. No data for overnight visits was available so visits have been divided into local and day visits only. This means that the overall economic value of visits is likely to be higher the the recorded figure due to the higher levels of visitor spend associated with overnight visits.

Online engagement

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

Websites

The survey asked if museums had their own website, in addition all Accredited museums were 'googled' in October 2017 to establish whether they had their own websites. 96% (175 of 183) had their own websites. In addition, museum's were asked if they had editorial control over their website. 122 museums responded to this question, 88% (107 of 122) stated they had editorial control over their website. Of the 15 museums that didn't have editorial control, nine were local authority museums, five were independents and one was a military museum.

Museums were asked to provide data on total unique visitors to their websites. 56 responses provided figures however perhaps more significantly 41% (41 of of 99) of museums that responded stated they did not know or the information was not recorded.

This suggests that this kind of information was not easily accessible or shared within their organisation by the person completing the survey or that museums are not using basic analytics tools such as Google Analytics to collect this information and monitor their website usage.

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.

92% (119 of 129) stated that they did use social media to engage with audiences, this is up from 86% last year. By comparison, the Visit England *'Visitor Attraction Trends in England'* 2016 report showed that 82% of attractions used Facebook and 68% used Twitter, the two main social media platforms.

Highlights: Epping Forest and Lowewood Museums

Epping Forest District and Lowewood Museums continue to explore resilience work principally through their Arts Council funded *No Borders* project, working in partnership with Chelmsford Museum. A Commercial Manager, Fundraising Manager and Public Engagement Officer were appointed to work across the three museums to explore opportunities within these areas. Work includes a new refreshment and retail space for Lowewood Museum and the creation of a Development Trust, a fundraising charity enabling income from sources not openly available to local authority museums.

Educational engagement

Museums were asked to provide data on the number of sessions and participants across both formal and informal learning activities in 2016-17.

Museums delivered 6,987 learning sessions on-site and engaged 229,341 participants in education sessions, based on responses from 105 museums. 21 museums stated they delivered no formal education sessions on site. Museums engaged an average of 34 schools and formal learning organisations in 2016-17.

113 museums provided information on informal activities and events that were delivered on-site. Museums delivered 3,600 activities and events on-site with non-education providers that engaged 234,052 participants. Nine museums stated they delivered no informal activities and events on site.

Educational outreach

Outreach work is an important part of the learning offer from many museums and an important way of involving local communities which might not use the museum building. Museums delivered 1,708 learning outreach sessions off-site and engaged 70,897 participants, based on responses from 107 museums.
This includes where loan box sessions at schools. 72% (48 of 67) of the museums that provided figures did not provide any formal learning outreach activity.

103 museums provided information on informal activities and events with non-education providers that were held off-site. Museums delivered 1,066 activities and events that engaged 76,109 participants.

Highlights: Colchester and Ipswich Museums Service

CIMS' Arts Council funded project, The Training Museum was shortlisted for the Creative and Cultural Skills Heritage Award in March 2017. The award recognised the work the team did to enable more people to get involved with museums and open up routes in to employment in the museum sector. This included a range of volunteering opportunities, traineeships and working with schools opening up access to the museums' collections and encouraging children to think about the skills they might need to work in museums.

Financial operations

Museums were asked to provide a range of financial information covering sources of income, overall expenditure and expenditure on staffing. Some of this information was provided in varying degrees of completeness and there was some variation on the financial periods that museums provided data for. Therefore the data presented here should be considered a guide, rather than being representative of a specific financial period.

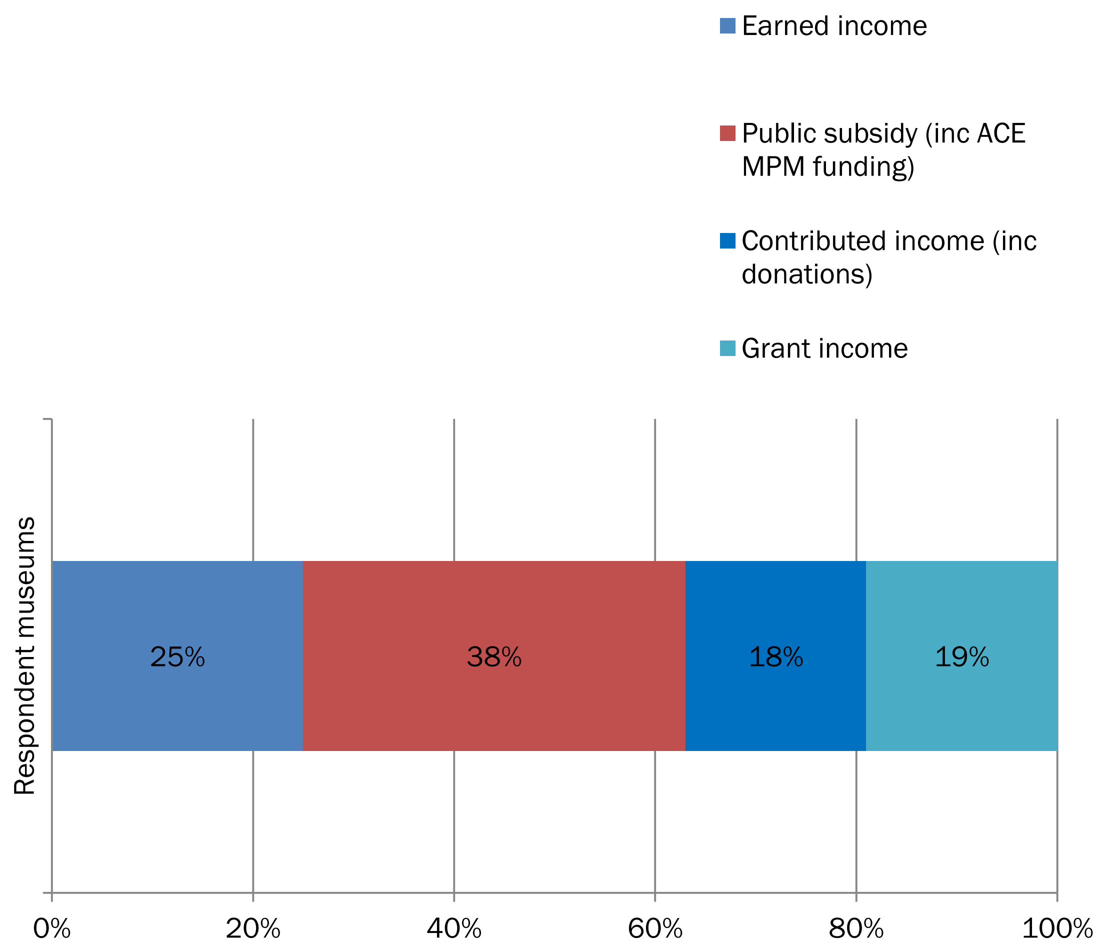
Income

Annual total income generated and received by museums was £38,824,462, which breaks down as follows:

- £9,613,361 in earned income including admissions, retail, catering, events and hospitality, educational activity and any other income from trading activity e.g. property rental.
- £14,665,310 received in regular public subsidy including ACE Major Partner Museum funding.
- £7,370,773 received in grant funding.
- £7,175,018 received in contributed income. This includes all money received from the general public or friends in donations (including friends/member schemes) alongside any income from sponsorship, corporate membership schemes or other non-earned income other than grants.

The above figures do not include National museums – IWM Duxford and the National History Museum at Tring.

Figure 11: Total income by source for all respondent museums. Legend categories from top are shown left to right in chart.



Income change over time

- There were major variations between local authority museums and independent museums in relation the relative importance of different income sources. There was insufficient data to provide comparisons for other types of museum.

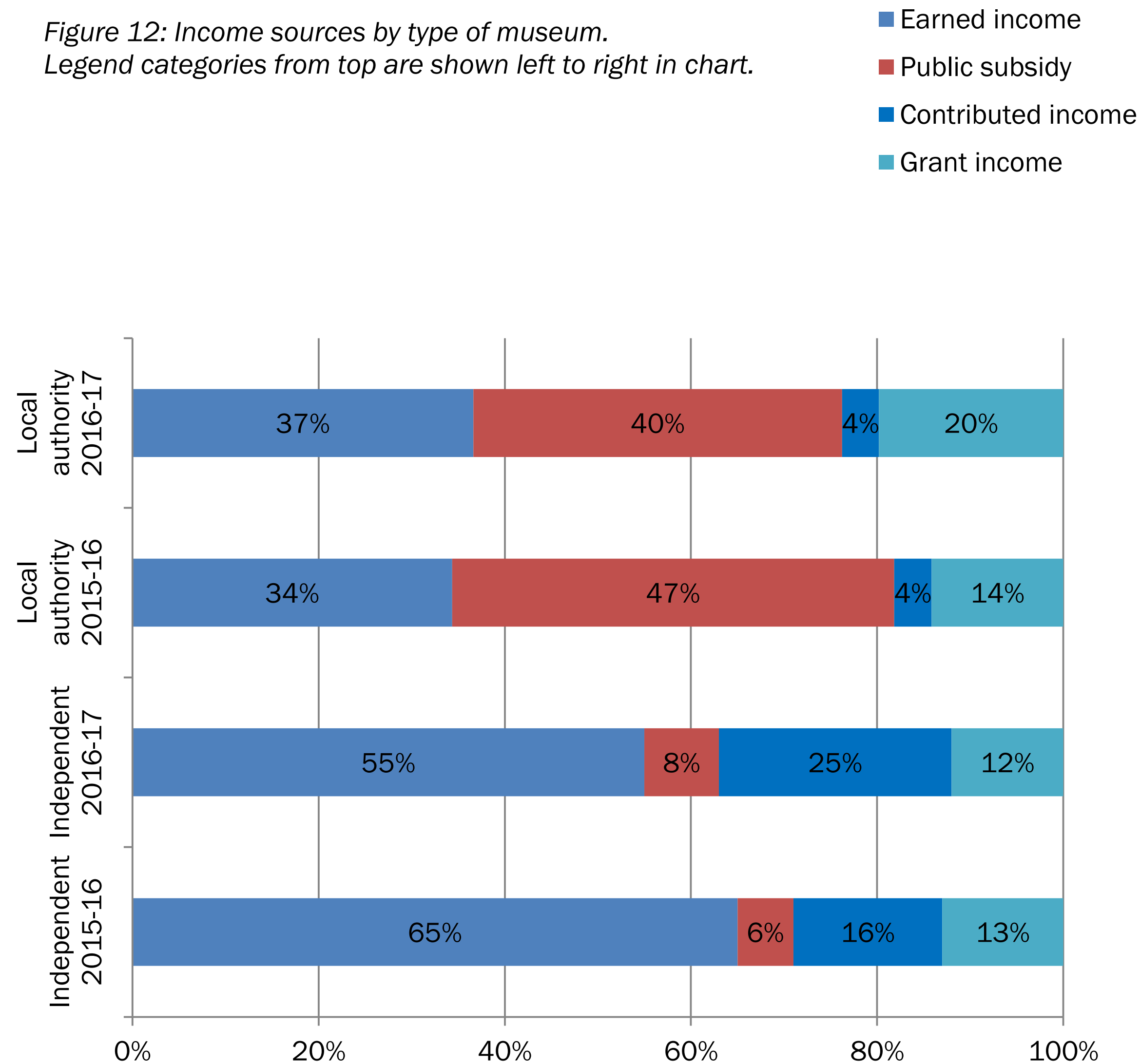
- Based on data from 74 museums and museum services that provided data for 2015-16 and 2016-17 there were some significant changes. Most notably, there was a reduction in the level of regular public subsidy received by local authority museums. There was also a significant increase in the level of contributed income received by independent museums, although this may be due to how income was reported and the particular museums that responded to the question.

Average income by type

The income figures below indicate what the average income of a certain type of museum across the two years might be based on the above constant sample:

- The average income for a local authority museum was £580,850 in 2016-17, down from £604,438 in 2015-16.
- The average income for an independent museum was £146,351, up from £124,670.

Figure 12: Income sources by type of museum. Legend categories from top are shown left to right in chart.



Admission charges

Museums were asked whether they charged for admission. All Accredited museum websites were also checked to compile a comprehensive list of museums that charged and those that did not.

54% (88) normally charge for admission, 41% (67) offer free entry all year and 4% (7) were free but charged for some exhibitions or seasonally, while seven museums were closed for redevelopment.

The figures at right show the average admission charge for museums by size and type – three museums are not included within these figures or the figure below as their collections are within other charged entry museums.

Figure 15: Charging bands for museums that charge admission.

	Adult	Child
Free	-	14% (12)
Under £3	18% (16)	36% (31)
£3.00 to £4.99	30% (26)	29% (25)
£5.00 to £7.49	21% (18)	13% (11)
£7.50 to £9.99	13% (11)	8% (7)
£10.00 or over	18% (16)	1% (1)

Figure 13: Average adult admission charge by size and type.

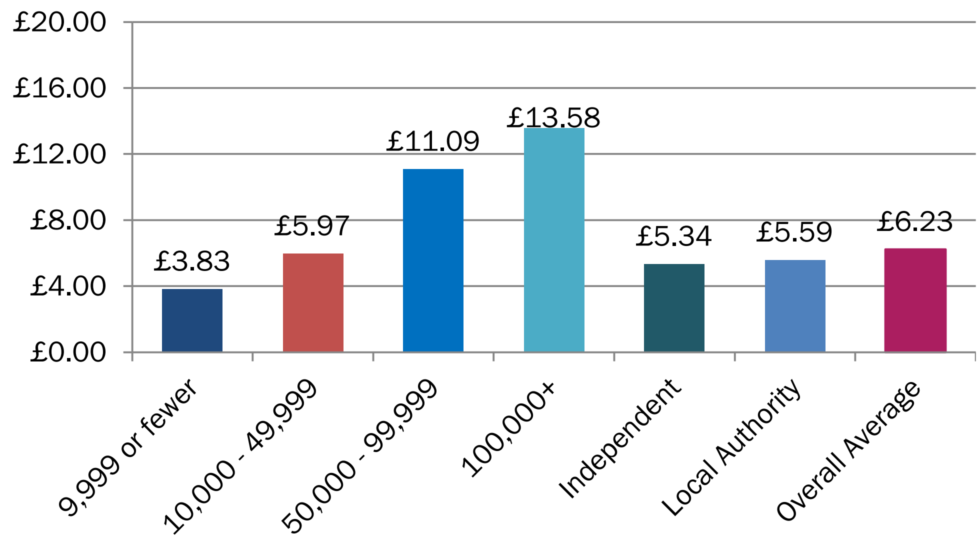
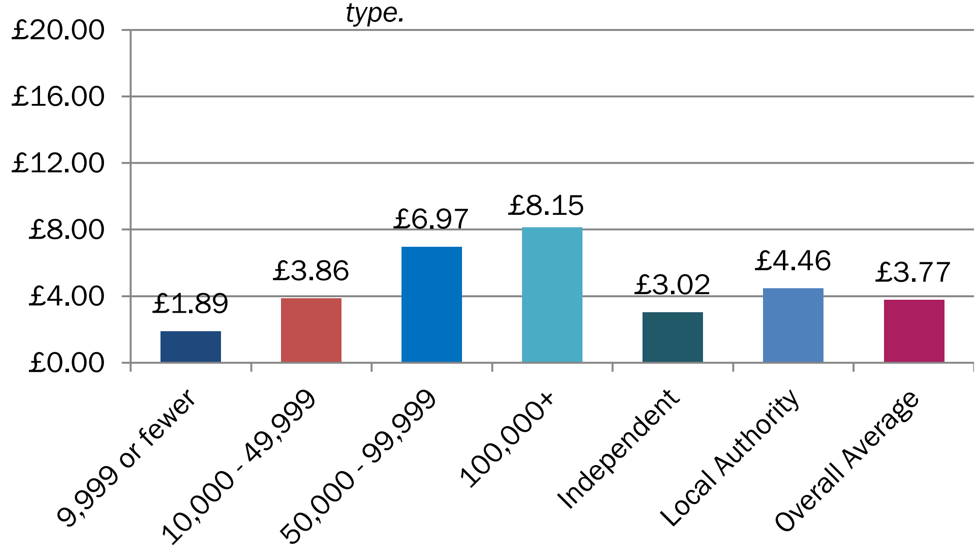


Figure 14: Average children admission charge by size and type.



Retail income

Shops are an important source of income for museums. One Key Performance Indicator museums can use to understand the effectiveness of their retail offer is retail spend per visitor. 81 museums provided both retail spend and total visits to perform this calculation.

One museums service has not been included as it did not provide a breakdown of retail income for each of its sites.

The results in Figure 16 and 17 suggest that spend on retail are slightly higher at museums that charge for admissions although this does not take account of the particular museums that responded or reflect the influence of other factors such as the quality of the retail offer.

The three museums that had the highest level of retail spend per head were at museums with specialist collections.

There are some significant fluctuations when compared to last year's findings, however, this is primarily due to the particular museums that responded to the survey.

Figure 16: Average retail income per head by size and charging model.

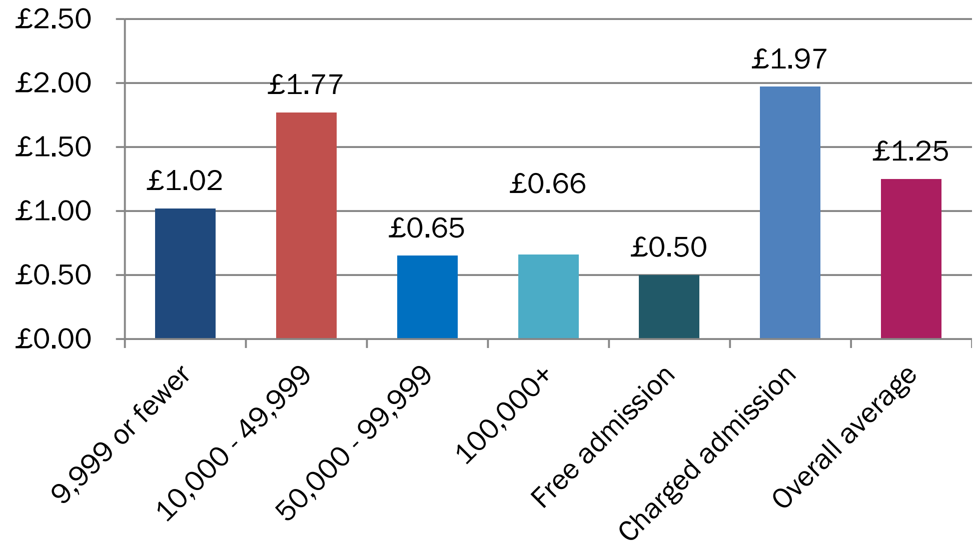


Figure 17: Average retail income per head by size and charging model.

	Sample size	Average	Lowest	Highest
9,999 or fewer	39	£1.02	£0.06	£8.00
10,000 – 49,999	30	£1.77	£0.03	£18.21
50,000 – 99,999	6	£0.65	£0.15	£1.45
100,000+	6	£0.66	£0.02	£1.69
Free admission	36	£0.50	£0.02	£2.00
Charged admission	40	£1.97	£0.03	£18.21

Donations

Donations play an important role in supporting museums' fundraising activity. Although for many museums they account for a relatively small percentage of overall revenue the visibility of donation boxes can help reinforce the charitable nature of museums.

Museums were asked to provide information on their donations so that an average per visitor could be given. The averages in Figures 18 and 19 are based on information from 91 responses. Six responses have been not been included from these calculations as anomalies given their extremely high donation per head figures. One museums service has not been included as it did not provide a breakdown of donations for each of its sites.

Museums that charged admission show a markedly higher per head income from donations than free entry museums although this does not reflect other factors that may influence the level of donations. The results also suggest that donations per head were significantly higher at small museums (9,999 visits or fewer), however this could be down to the smaller sample size of larger museums.

Figure 18: Average donations per head by size and charging model.

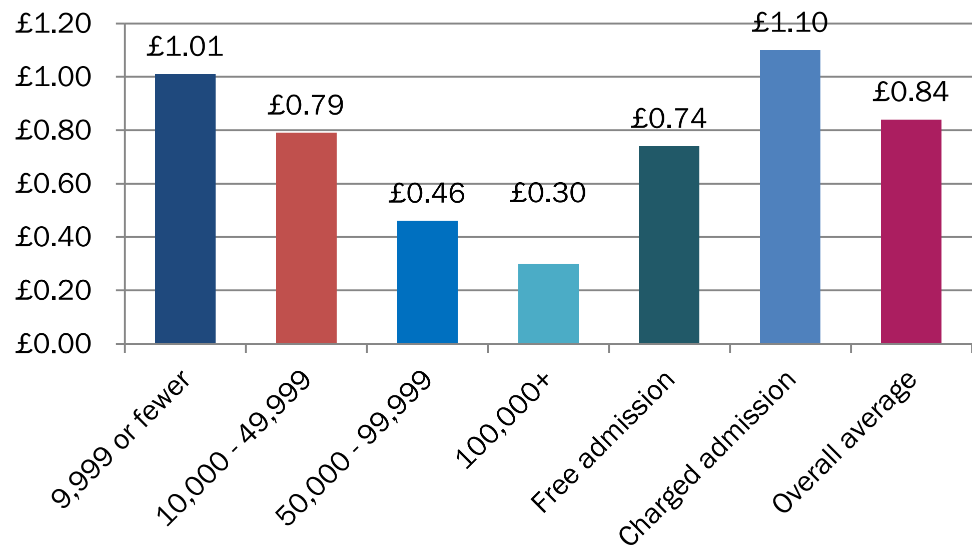


Figure 19: Average donation per head by size and charging model.

	Sample size	Average	Lowest	Highest
9,999 or fewer	48	£1.01	£0.04	£3.59
10,000 – 49,999	28	£0.79	£0.01	£3.61
50,000 – 99,999	8	£0.46	£0.01	£1.81
100,000+	6	£0.30	£0.06	£0.95
Free admission	49	£0.74	£0.01	£3.59
Charged admission	35	£1.10	£0.03	£3.61

Impact of spend on goods and services

Using the AIM Economic Impact Toolkit we can estimate the economic value of museum spend on goods and services. This calculation is based on a calculation of the direct, indirect and induced impacts of museum expenditure figures (excluding staff spend) from 93 responses taking into account 'leakage', 'displacement ', 'deadweight' and multiplier factors 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.

Figure 20: Impact of spend on goods and services by county.

	Number of responses	Value
Bedfordshire	7	£904,363
Cambridgeshire	20	£5,855,457
Essex	16	£2,474,734
Hertfordshire	13	£2,546,403
Norfolk	13 (NMS as one)	£4,599,942
Suffolk	24	£3,512,214
Total	93	£19,893,113

Highlights: National Heritage Centre for Horseracing and Sporting Art

The National Heritage Centre for Horseracing and Sporting Art opened in November 2016 and was shortlisted for Art Fund Museum of Year 2017. The museum brings together two collections; the National Horseracing Museum and the National Art Gallery of British Sporting Art. It holds nationally and internationally significant collections of fine and decorative art, social history objects, archive material and photographs relating to the history and science of the sport and industry of horseracing, as well as BSAT's collection of British sporting paintings, prints and sculpture.

Expenditure and staff costs

60 responses were received from museums and museums services that employ paid staff and provided both total expenditure and expenditure on staff costs. On average, spending on staff accounted for 49% of total expenditure which breaks down as follows:

- 15 spent 30% or less of annual expenditure on staff costs
- 16 spent between 31% and 50%
- 15 spent between 51% and 70%
- 14 spent between 71% and 100%

Based on a constant sample of 37 museums that provided data for 2015-16 and 2016-17, average spending on staff dropped by 1% to 46% of total expenditure.

As with 2015-16, the most notable finding is that staff costs make up a significantly higher percentage of costs for local authority museums on average than they do for independent museums. Data on the number of paid staff and Full Time Equivalents would suggest that this can partly be explained by the fact that in general, local authority museums employ a greater number of staff compared to independent museums who benefit from a much greater volunteer contribution. It is also worth noting that local authority museums may not have included staff costs that are related to services provided centrally such as finance, HR, legal and IT support. Therefore the real cost of staffing as a percentage of total expenditure is likely to be higher for those museums.

Figure 21: Average expenditure on staffing by size and type.

Category	Number of respondents	Average % of total expenditure spent on staffing	Lowest %	Highest %
9,999 or fewer visits	23	46%	3%	84%
10,000 - 49,999 visits	24	48%	8%	96%
50,000 – 99,999 visits	7	48%	8%	73%
100,000+ visits	4	61%	36%	77%
Independent	38	43%	3%	87%
Local Authority	17	57%	28%	96%

Workforce – paid staff

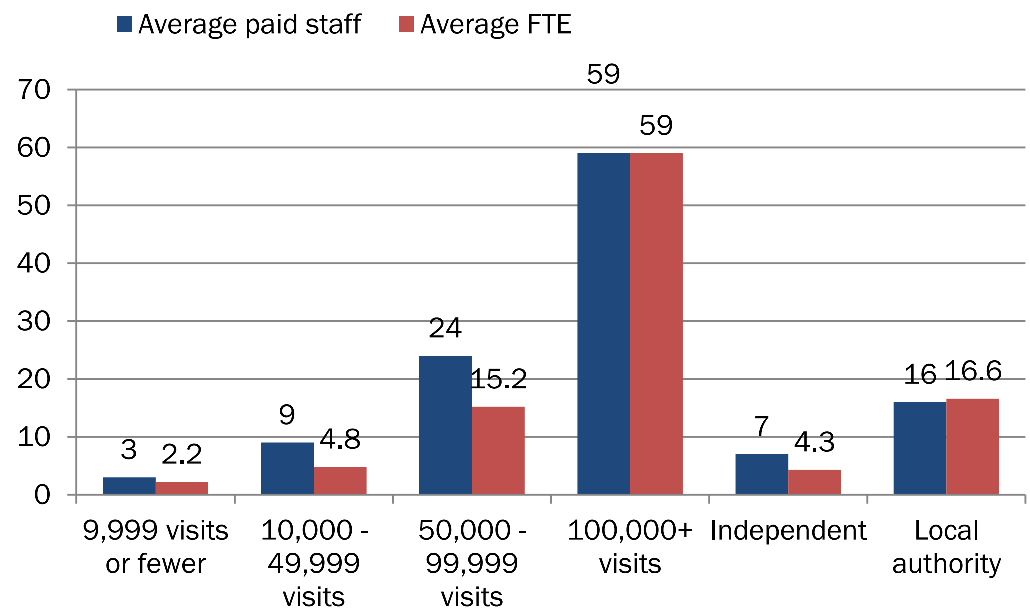
Museums were asked to provide information on both the total head count of staff employed by the museum at its peak in the year and the number of Full Time Equivalents.

- Museums employed 915 paid staff based on 115 responses, (NMS and IWM Duxford did not provide total staff figures so this figure is likely to be significantly higher) Averages can be seen in Figure 21.
- Museums employed 710 FTEs based on 111 museums (not including IWM Duxford).
- 31% of museums (36 of 115) were entirely volunteer-run with no paid staff.
- Volunteers outnumber paid staff by just over 7:1.

Employment impacts

Using the AIM Economic Impact Toolkit we can estimate the value of museum employees to the East of England regional economy. Museums created 1,022 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. FTE converts employment into full time positions. This allows for comparison between organisations. For the purposes of this analysis, where a museum has not supplied an FTE figure the assumption that two paid staff equals one FTE has been used.

Figure 22: Average paid staffing numbers (for museums that employed at least 1 paid staff member).



There is a discrepancy in the average paid staff numbers in the 100,000+ visits and local authority categories as NMS provided FTE staffing figures but not a head count.

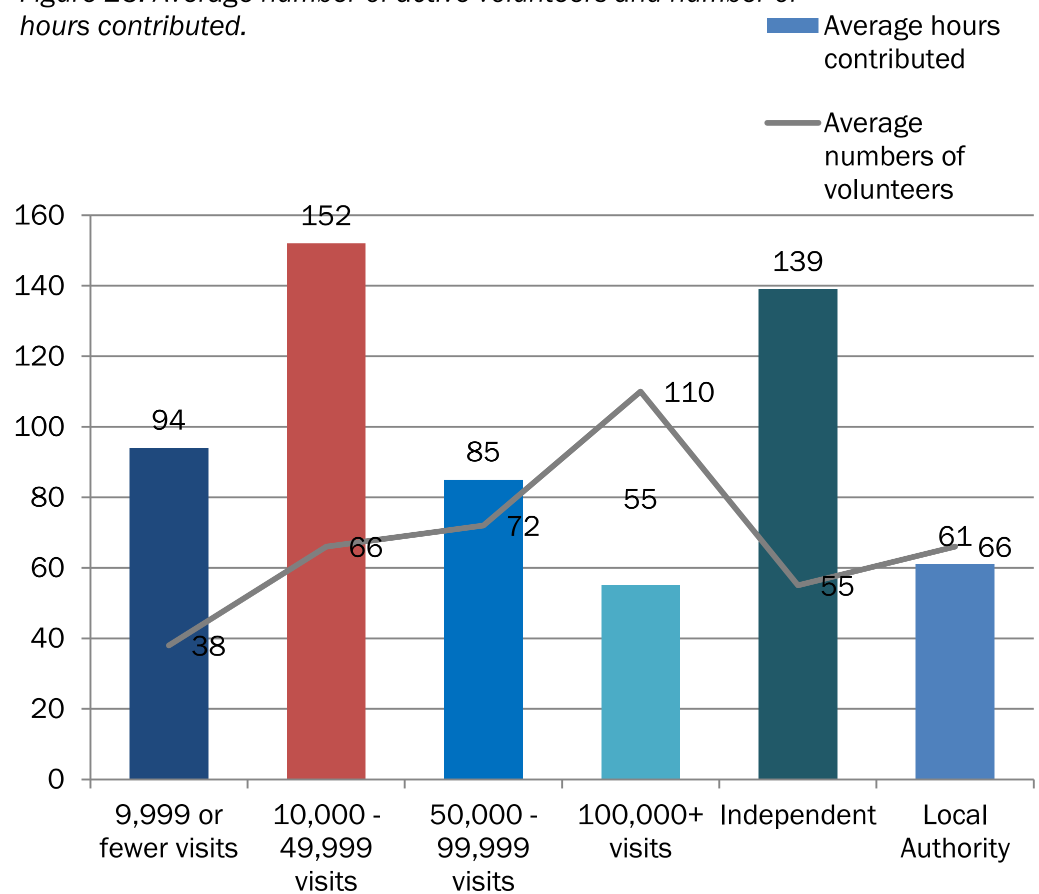
Workforce – volunteers

Volunteers are an increasingly important part of the museum workforce. Volunteer involvement makes a huge difference to museums – everything from enhancing the visitor experience, caring for and documenting the collections, business planning and managing finance. Many museums also rely on voluntary trustees to help 'steer the ship' and ensure museums are sustainable in challenging times.

115 museums provided data on their volunteers, only 1 museum stating they had no volunteers.

- There were a total of 6,608 volunteers which equates to 446 Full Time Equivalent posts, based on the equivalent to 1,820 hours worked per year or a 35 hour working week.
- On average museums had 57 volunteers. This is up from 53 volunteers in 2015-16 and 44 in 2013-14.
- Volunteers contributed a total of 812,366 hours to museums in 2016-17.
- Each volunteer contributed an average of 124 hours in the year, based on information from museums that provided both total volunteer numbers and hours contributed. This figure is heavily influenced by one response where the number of hours contributed was stated as 135,000. If this response is removed the average is 108 which is more in line with previous findings.
- This figure is down by 7% between 2015-16 and 2016-17, based on a constant sample of 82 museums.
- Volunteer time was worth £5.8 million to museums. This value is based on a calculation of £50 per day using guidance issued by the Heritage Lottery Fund.

Figure 23: Average number of active volunteers and number of hours contributed.



One museum response has not been included in the above chart as a statistical outlier.

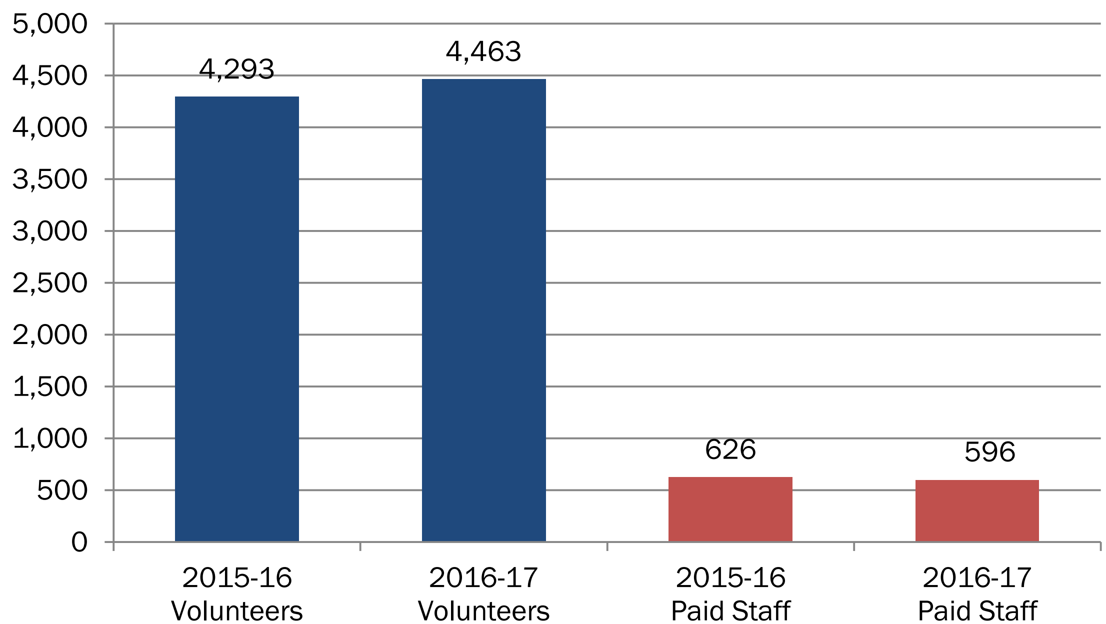
Changes in workforce

- There has been a decrease of 4.8% in the levels of paid staffing since 2015-16, based on a constant sample of 85 museums and museum services.

- Across this same constant sample the numbers of volunteers increased by 4%.

- Although not every museum in this constant sample core group provided volunteer hours for both 2015-16 and 2016-17 these have also increased by 4.8% from an average of 5,730 per museum to 6,007.

Figure 24: Core group workforce 2013-14 and 2015 by employment type (volunteer and paid)



Fundraising

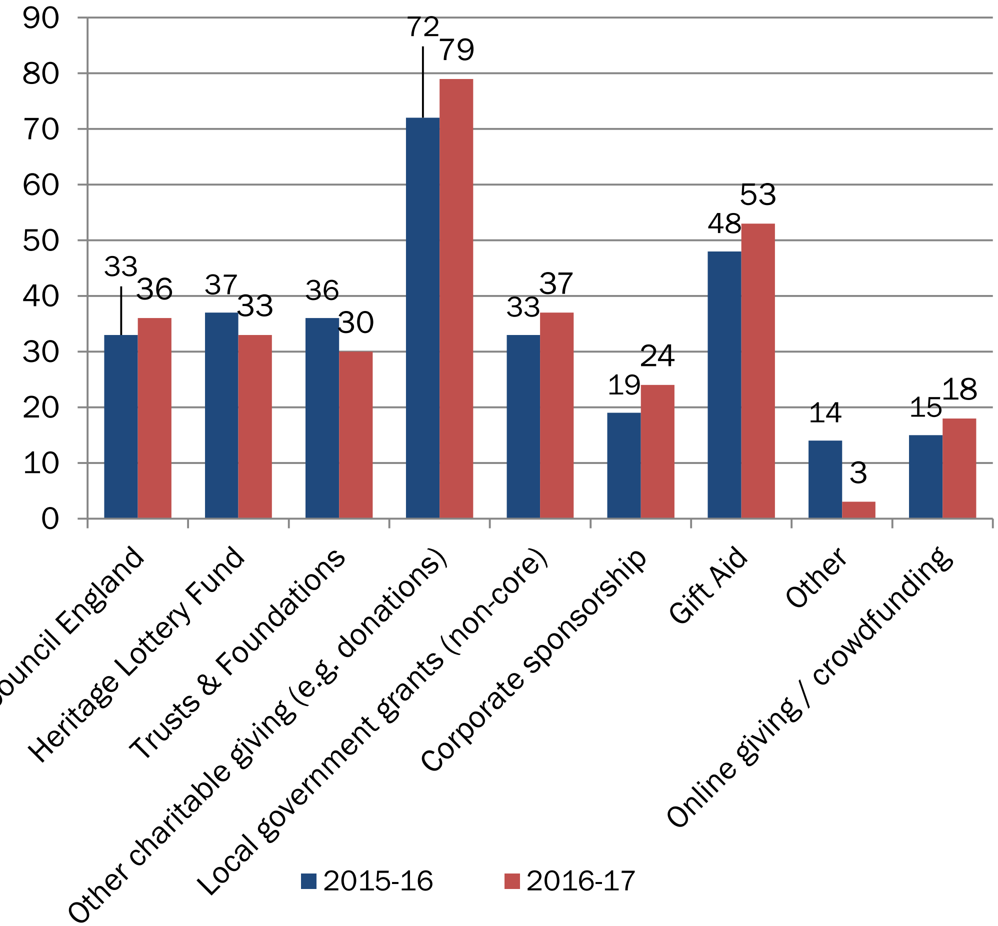
This year an additional question on fundraising was asked about the ways in which museums fundraise, the sources of grant income and whether they had used online giving or crowdfunding to raise funds.

Figure 25 shows that most museums were likely to have received funding via donations, Friends/Membership schemes, while the second most common source was Gift Aid. Corporate sponsorship and online giving or crowdfunding were the least commonly utilised, although they have grown since last year.

In an additional question about online giving, 16% (18 of 116) of museums said that they had used online giving in the last 12 months, up from 14% last year (15 of 108).

Although the comparison figures between 2015-16 and 2016-17 are not based on a constant sample there is generally an upward trend in the number of museums undertaking different types of fundraising activity. Perhaps surprisingly there has been a small decrease in the number of museums stating they had received funding from Trusts and Foundations, possibly highlighting the increasing levels of competition for these funds.

Figure 25: Fundraising sources which museums have received in the last 12 months.



SHARE Museums East support

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

"The SHARE network is an invaluable support network, it fulfils the needs of us as an independent museum and goes further by giving us the opportunities through training courses and resources to become the best we can achieve in our field."
Sheringham Museum

"We are extremely grateful to SHARE for its support to museums in the region, most particularly its excellent training programme. Keep up the good work!"
Letchworth Museum and Art Gallery

We have greatly valued the wide ranging support we receive from SHARE and we plan to continue to make the most of all the opportunities that SHARE makes available."
Ely Museum

"SHARE is a brilliant opportunity for our staff and volunteers to access training. As a new museum manager I have found Volunteer Management training and the chance to network with other professionals in similar situations particularly useful."
Burwell Museum Trust

"The SHARED Enterprise Cohort on major funding applications was very useful and stimulating, about to be put to the test as we enter discussions with HLF on proposed applications"
Saffron Walden Museum

"SHARE Museums East has always been extremely helpful with training, guidance as well as funding projects. We are currently involved in Rationalisation of the Museum's collections which should be completed within the next few months."
Ware Museum

"Advice from SHARED Enterprise on crowd funding was very helpful and easy to access. It supported the planning for our Indiegogo campaign which brought in over a thousand pounds."
Cambridge Museum of Technology

"Such a supportive organisation on so many levels. Always approachable and knowledgeable. Great for networking"
Mill Green Museum and Mill

"We have received great support from the Museum Development Programme through training sessions, 1 to 1 consultations and guidance on specific issues"
Museum of Power

With thanks to the following museums for participating:

CIMS – Colchester & Ipswich Museums Service
LC – Luton Culture
NMS – Norfolk Museums Service
UCM – University of Cambridge Museums

Bedfordshire

The Higgins Art Gallery & Museum
Intelligence Corp Museum, Chicksands
John Bunyan Museum and Library
Leighton Buzzard Railway Museum
Panacea Museum
Ridgmont Station Heritage Centre
Stockwood Discovery Centre (LC)
Wardown Park Museum (LC)
Woburn Heritage Centre

Cambridgeshire

Airborne Assault Museum
Burwell Museum Trust
Cambridge Museum of Technology
Chatteris Museum
Cromwell Museum
Ely Museum
The Farmland Museum & Denny Abbey
Fitzwilliam Museum (UCM)
Imperial War Museum Duxford
March & District Museum
Museum of Classical Archaeology, University of Cambridge (UCM)
Nene Valley Railway
Norris Museum
Peterborough Museum & Art Gallery
The Polar Museum, Scott Polar Research Institute (UCM)
Prickwillow Drainage Engine Museum
Ramsey Rural Museum
Royal Anglian Regiment Museum
St Neots Museum
Sedgwick Museum of Earth Sciences (UCM)
Stained Glass Museum
Thorney Heritage Museum
University Museum of Zoology (UCM)
University of Cambridge Museum of Archaeology & Anthropology (UCM)
Whipple Museum of the History of Science (UCM)
Whittlesey Museum
Wisbech & Fenland Museum

Essex

Braintree District Museum
Brightlingsea Museum
Burnham-on-Crouch & District Museum
Chelmsford Museum & Essex Regiment
Colchester Castle Museum (CIMS)
Combined Military Services Museum
East Anglian Railway Museum
Epping Forest District Museum
Essex Collection of Art from Latin America, University of Essex
Essex Fire Museum
Essex Police Museum
Fry Art Gallery
Hollytrees Museum (CIMS)
Maldon District Museum
Mersea Island Museum
Museum of Power
Natural History Museum, Colchester (CIMS)
Northweald Airfield Museum
Rayleigh Town Museum
Saffron Walden Museum
Scout Association Heritage Service
Stow Maries Airfield
Warner Textile Archive

Hertfordshire

Ashwell Village Museum
Bishop's Stortford Museum
British Schools Museum
Dacorum Heritage Trust
de Havilland Aircraft Heritage Centre
Garden City Collection, Letchworth
Hertford Museum
Hitchin Museum & Art Gallery
Letchworth Museum and Art Gallery
Lowewood Museum
Mill Green Museum & Mill
Museum of St Albans
Natural History Museum at Tring
Redbourn Village Museum & Historical Society
Royston & District Museum and Art Gallery
Stevenage Museum
UHArts
Verulamium Museum
Ware Museum
Watford Museum
Welwyn Roman Baths

Norfolk

100th Bomb Group Memorial Museum
The Ancient House, Museum of Thetford Life (NMS)
Bressingham Steam Museum
Cromer Museum (NMS)
Diss Museum
Elizabethan House Museum (NMS)
Fakenham Museum of Gas & Local History
Gressenhall Farm & Workhouse (NMS)
Lynn Museum (NMS)
Mundesley Maritime Museum
Museum of Norwich at the Bridewell (NMS)
Museum of the Broads
Norwich Castle Museum & Art Gallery (NMS)
RAF Air DE fence Radar Museum
RNLI Henry Blogg Museum
St Seraphim's Icon & Railway Heritage Museum
Sheringham Museum Trust
South Asian Decorative Arts & Crafts Collection Trust
Strangers Hall (NMS)
Swaffham Museum
Time and Tide Museum (NMS)
Tolhouse Museum (NMS)
True's Yard
Walsingham Abbey Grounds & Shirehall Museum
Wymondham Heritage Museum

Suffolk

Aldeburgh Museum
Beccles and District Museum
Bentwaters Cold War Museum
Christchurch Mansion
Clare Ancient House Museum
Dunwich Museum
East Anglia Transport Museum
Felixstowe Museum
Gainsborough's House Society
Halesworth & District Museum
Haverhill & District Local History Group
HMS Ganges Museum
Ipswich Museum
Ipswich Transport Museum
Lanman Museum
Little Hall Museum
Long Shop Museum
Lowestoft Museum
Mildenhall & District Museum
Moyse's Hall Museum
Museum of East Anglian Life
National Heritage Centre for Horseracing & Sporting Art
Norfolk & Suffolk Aviation Museum
Orford Museum
Red House, Aldeburgh
Saxmundham Museum
Southwold Museum
West Stow Anglo-Saxon Centre

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