Museum Development North West

Annual benchmarking survey report

2014-16

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Contents

1. Introduction

This report summarises the findings of the second regional benchmarking survey of North West museums, covering the period 2014-16. The survey was carried out to gain a picture of the state of the regional museums sector at the present time and to track any changes and trends from the previous survey.

An online survey was sent to all 145 Accredited museums and museums officially working towards Accreditation in the North West, as recognised by Arts Council England (ACE) at July 2016. The return rate was 52%[1].

The survey is based upon SHARE Museums East's version, which has been carried out annually since 2001. Over those years they have carried out the testing and made changes to the survey to ensure that the MDNW current format is unlikely to change in the future.

The sections in the survey are:

1) Museums
2) Audiences
3) Resources (finance, staff and volunteers)
4) Collections
5) Regional support

There is also a final section, changed with each survey, to give a snapshot of current museum practice and provision. In this year's survey the section is about children and young people and museums' interaction with Curious Minds, the Bridge organisation for the North West.

In summer 2016 the Museums Association (MA) and Museum Development Network (MDN) also jointly released a UK-wide museums survey, covering the period 2015-16. Five museums that completed this survey but not ours gave permission for their data to be included in our analysis; consequently we have more data available for 2015-16 than for 2014-15.

[1] West Cheshire Museums included the Lion Salt Works and Chester History & Heritage within their return which are non-Accredited sites

2. Limitations and assumptions

The response rate was 52%. The figures and conclusions drawn in this report are based on the data received only; we cannot double up the figures and claim that to be an accurate representation of the whole regional sector. We are hopeful that the North West response rate will increase year on year to give more accurate depictions of the sector.

Where a museum is within another museum, the smaller museum has generally referred us to the larger museum's visitor numbers and financial figures so they have only been included within the main museum's figures to avoid duplication.

For accuracy figures have been calculated to two decimal places, but final statistics have been reported rounded up or down to the nearest whole number for ease of reading.

This report does not attempt to be a statistical analysis using professional evaluation techniques; instead it gives a flavour and basis to work for future surveys. As the return rate has been half of potential respondents, we have not excluded any data in order to give a constant sample (in a full statistical analysis museums with missing data or partially complete data would be excluded). We have also not given the mean, although we have indicated where appropriate the number of returns given for a particular question. Percentages have been worked out based on all the responses given, without exclusions.

The main emphasis of this report has been to look at changes in visitor numbers to museums, but museums have more types of audiences than just those visiting the museum. We have not attempted to measure, for example, visitors to online content, or the impact of university museums on undergraduate and postgraduate research.

The statistics on museums' contribution to the local economy in the report were calculated using the Association of Independent Museum's (AIM) economic impact toolkit, measured using Level 1 economic value of visitors calculations, including local area visitor spend assumptions broken down by county. The county figures do not take into account variations where there are significant differences between spend in museums in popular tourist areas and those within the same county that are not.

3. Update on 2013-14 benchmarking report

In the 2013-14 report we made a number of action points for MDNW to take as well as recommendations for museums. The following is an update on these points:

1) Continue annual survey to track trends in visitor numbers

This is the second survey, this time covering two financial years. In the future either we will continue to carry out the survey independently, or if ACE decides to implement a national one we will coordinate that in the North West.

2) Museums without accurate mechanism for counting total visitors look to find one by 2015-16

3% of the museums which responded are still estimating visitor numbers.

3) Signpost museums to guidance on how to effectively capture visitor data

In 2016 we ran a workshop programme, "Knowing Your Audiences", and also published an accompanying epublication, outlining a variety of methods to capture visitor data, suitable for all sizes of museums. The epublication is available at https://museumdevelopmentnorthwest.files.wordpress.com/2012/06/knowing-your-audiences1.pdf.

4) Support museums so 100% of North West Accredited museums have access to some form of audience data collection by 2018

We will monitor this through museums' Areas for Improvement on their Accreditation returns. Our "Knowing Your Audiences" epublication compares the different data collection methods currently available, such as Viewpoint, Visitor Finder and Visitor Verdict.

5) Look at any research, evidence, and case studies, into the effect on visitor figures of a change in price at the lower end of the charging scale

In 2016 AIM published, "Taking Charge – Evaluating the Evidence: The Impact of Charging or Not for Admissions on Museums" and an accompanying success guide, "Successfully Setting Admissions Policy and Pricing". See page 21 for further information on the results of AIM's research.

6) Continue to deliver support around ACE Goal 3, resilience, in 2015-18

Development programmes delivered around retail (with the Association of Cultural Enterprises), sustainability and strengthening boards; individual projects supported through the Sustainable Improvement Fund.

7) Disseminate the findings from MDNW's retail work in 2013-14 in an epublication

In 2015 we published "Retail Development Toolbox", https://museumdevelopmentnorthwest.files.wordpress.com/2012/06/quince-e-publication-15th-apr-compressed.pdf.

8) In a future survey look at museum attitudes to investment in staff/volunteer CPD – has reduced capacity made it more difficult to attend training or are staff being more encouraged to diversify their skills base?

Still to be done.

9) Work with the Manchester Partnership and Collections Trust on sustainable collections development in 2015-18 programme

Sustainable collections and rationalisation forms one of the strands of work in our bid to ACE for funding in 2018-22.

10) Collate existing information on the effectiveness of past digitisation projects, look at current barriers to online content projects

Still to be done.

4. Museums

Rate of return

A full list of the museums which returned the survey is included as Appendix A. The tables below show that respondents fairly evenly represent all counties in the North West and governance type, except for National Trust and English Heritage.

Museums responding, by location

	Number of responses	Percentage return
Cheshire	15 from 22	68%
Cumbria	16 from 27	59%
Greater Manchester	16 from 42	38%
Lancashire	18 from 33	55%
Merseyside	10 from 21	48%
Total	75 from 145	52%

Museums responding, by type of museum

	Number of responses	Percentage return
Independent	32 from 60	53%
Local authority	31 from 50	62%
National	8 from 12	67%
University	4 from 9	44%
National Trust[2]	0 from 11	0%
English Heritage	0 from 3	0%

[2] Only National Trust and English Heritage properties which are Accredited were sent the survey

5. Audiences

This section looks at overall visitor figures and, where figures have been provided, visits by children, visits by school age children in organised groups, and outreach participation by children and adults.

5.1. Overall visitor figures

This is not an exercise to compare the visitor figures of museums against each other. Each museum's percentage change of year on year figures has been calculated to look for overall trends. For smaller museums, it will take a small change in visitor figures to reflect a sizeable percentage change; the effect is less noticeable in larger museums. However, the headline figures for total visits to museums in the North West are dependent on the change in figures for a small number of our largest museums.

MDNW action

Continue annual or biennial survey to track trends in visitor numbers

Absolute figures show **6,058,741** people visited the 75 sites in 2014-15, and **6,606,982** visitors across the same sites in 2015-6, an overall increase of **9%**.

In our first survey, 53 sites reported 2012-13 visitor figures collectively of 6.8m and 51 sites reported 2013-14 figures of 6.5m. Whilst the different number of museums reporting each time makes it difficult to make accurate year on year comparisons, the overall visitor numbers to museums in the North West appears to be relatively stable at between 6m and 6.8m.

Against a backdrop of large decreases in annual operating budgets in recent years whilst trying to maintain services, sustaining stable visitor figures is an achievement.

A small number of museums struggled to provide a definitive annual visitor figure, and others were unable to separate out visits by children or to quantify participation in outreach activities.

Recommendation for museums

Museums without accurate mechanism for counting total visitors look to find one by 2018

5.2 Visitor figures by county and type of museum

Visitor numbers by county

	2014-15	2015-16	% change
Cheshire[3]	766,197	785,442	3% increase
Cumbria	571,793	529,746	7% decrease
Greater Manchester	1,753,289	1,994,696	14% increase
Lancashire	512,916	493,601	4% decrease
Merseyside[4]	2,454,546	2,803,497	14% increase
Total	6,058,741[5]	6,606,982	9% increase

Local authority museums

Of the local authority museums completing the full survey (excluding Manchester Art Gallery – see the table about the largest museums), visitor figures for services which were not affected by major building work or flooding saw either small decreases in visitor figures or larger increases:

- 4 out of 5 single site local authorities with a fall in visitor figures recorded a decrease of only 1% to 5%, consistent with the findings of the benchmarking survey of 2013-14. The other site had a fall of 11%
- Of the 4 single site local authorities which reported an increase, these were significant numbers, ranging from 8% to 17%

[3] Tatton Park's return gave visitor figures for both park and mansion. In calculating visitor figures the numbers for the mansion have been used. Cheshire West Council's return includes figures for the Lion Salt Works and Chester History & Heritage which are not Accredited sites
[4]Within National Museum Liverpool's figures visits to the International Slavery Museum are not counted as the museum is situated within the Maritime Museum. Visits to the Piermaster's House are also not included. One Merseyside local authority museum reported 2015-16 figures but not 2014-15
[5] Of the museums that responded to the MA/MDN survey but not to ours, we have been able to accurately estimate visitor figures for 2014-15 based on information given in the survey for four of the museums. For one where we couldn't, if their visitor figures for 2014-15 were the same as for 2015-16 then another 125,000 visitors should be added to the 2014-15 figure

Of the local authorities with multiple sites:

- Lancashire County Museums Service's[6] individual sites reported increases in figures at all sites apart from three, including a 20% increase in visitors at Queen St Mill and three of the other LCMS sites which closed in September 2016[7]. These increases offset falls in visitors to the Museum of Lancashire, Lancaster City Museum and Lancaster Maritime Museum. The Maritime Museum was forced to close for a significant period due to damage caused by Storm Desmond. Overall, the total combined figures for the service indicated a 6% decrease; this would have been only a 3% decrease had the Maritime Museum's figures not been so badly affected by the flood damage
- Tameside Museums and Galleries showed a significant drop in visitor figures from 2014-15 to 2015-16, but this is due to the unexpected closure in May 2015 of the Museum of the Manchester Regiment as a result of major building works to the building the museum adjoins. Using the nearest set of years where the data is not skewed, both their main site, Portland Basin Museum, and the combined service saw an increase of 11% in visitor figures from 2013-14 to 2014-15
- West Cheshire Museums' individual site figures were not reported on, but their increase in visitor figures of 14% was in part caused by the opening of Lion Salt Works in May 2015
- Data from more local authority services with multiple sites e.g. Stockport and Bolton would make for a more meaningful comparison of trends across organisations running more than one museum

[6] Some audience figures for venues forming Lancashire County Museums Service are included within larger museums within which they sit e.g. figures for King's Own Royal Regiment Museum are included within Lancaster City Museum's statistics
[7] The museum closures, originally scheduled for March 2016, were announced in November 2015. We do not have the data to determine whether visitor figures were already increasing at these sites before the announcement, or whether the news of the imminent closures contributed to a surge of visitors towards the end of the financial year, although one of the sites reported that this was definitely the case

Independent museums

Of the independent museums completing the survey

- 5 reported no change in their visitor figures
- 6 reported decreasing visitor figures of between 2% and 9%
- Another 6 reported larger falls in visitor numbers of between 11% and 27%. A fall of 22% at Norton Priory was due to the closure of the museum and ruins for 18 months whilst the museum was redeveloped; concentrating activity on the Walled Garden kept their numbers up
- Only 1 museum reported small increased visitor figures of 3%
- All the other 7 museums which reported increased visitor figures saw substantial increases ranging from 9% to 86%. Keswick Museum & Art Gallery and Catalyst Science Discovery Centre reported the highest increases in numbers
- In the last three months of 2015-16 many museums, especially those in Cumbria, were affected by flooding, if not directly then through the impact on tourism or problems with the road and rail infrastructure. Half of the independent museums which reported falls in visitor figures were in Cumbria, yet half of the museums which reported increases in numbers that year compared to the previous year were also in Cumbria

In the 2013-14 survey, the majority of local authority and independent museums had relatively static and stable figures, seeing either increases or decreases within +/-5% change, suggesting that museums were maintaining visitor figures despite decreasing resources. The overall figures for 2014-16 suggest the same, but the statistics for individual museums are different. There are a larger number of museums than before which are seeing bigger percentage swings either increasing or decreasing in their visitor figures.

Within the North West totals, the statistics are heavily influenced by a small number of the biggest museums in the region, which account for approximately 60% of total visitors to North West museums. Large swings either way for these museums will have a dramatic impact on the regional numbers.

Visitor figures for the largest museums in the region[8]

	2014-15	2015-16	% change
Manchester Art Gallery	520,464	519,602	0
Manchester Museum	427,552	445,663	+4%
National Museums Liverpool	2,421,616	2,646,152	+9%
The Whitworth	104,242	382,474	+267%
Total	3,473,874	3,993,891	+15%
% of NW total	57%	60%	

We now have visitor figures for four consecutive years, from 2012 to 2016. Visitor figures at these larger venues are clearly keeping the North West total buoyant. Between 2012 and 2016 Manchester Art Gallery increased its visitor figures by 25%, and Manchester Museum by 19%. The Whitworth was not included in the first survey as it was closed for redevelopment, but since reopening in the space of one year its visitor figures have gone up 267%.

[8] Imperial War Museum (North) and National Football Museum submitted returns in the first survey but not the second, and there are also larger museums e.g. Museum of Science and Industry which have not submitted a return and are not included in the total. A direct comparison is therefore difficult to make

Reasons for changes in visitor figures

Comments from museums on their visitor figures suggest both national and local factors for changes. Reasons given included:

- Changes to the National Curriculum and the time taken for the museum offer to be adapted continues to be the most popular reason given for changes in visitor numbers
- The previous survey noted that national events such as the Olympics and the Queen’s Jubilee impacted on museum figures in 2012. In 2014 the centenary of the start of the First World War had a similar effect. Some museums saw both their school and outreach visits were increasing with the delivery of WWI-themed sessions. One museum noted, “In 2014 virtually every school was involved with the commemorations surrounding the 100th anniversary of the start of the Great War. Free transport was provided to the museum to take part in the commemorations”. Another museum reported that excessive competition for WWI resources had impacted on their visitor numbers
- The flooding in winter 2015-16 and its impacts was noted by museums in Cumbria, Lancaster, Rochdale and Manchester
- Organisational changes – experimenting with changes to opening hours, introducing admission charges part way through the year, changes to staff hours, temporary closure of café etc
- Raising the profile of the museum with the local community
- Impact on visitor figures of the opening of new galleries which can give an uplift before the figures settle down
- The impact of building work was mentioned in different respects – the effect on visitor figures of building work to the museum itself, the perception by visitors that the museum was closed due to the building work when it actually remained open, the increase in visitors to some museums when neighbouring attractions were closed for redevelopment
- Local events again had an impact, including the temporary return of Bluebird to Coniston and the 1715 Jacobite rebellion

5.3 Visitor figures by category

The survey asked museums to break down, with estimates if accurate figures weren't possible:

- The total number of children and young people (CYPs) visiting the museum
- The total number of CYPs visiting in organised groups e.g. schools, Brownies
- The total number of CYPs participating in outreach activities
- The total number of adults participating in outreach activities

The total number of CYPs visiting museums was recorded as **450,145** in 2014-15 and **422,142** in 2015-16, an overall decrease of **6%**. These figures are roughly the same as those reported in 2012-13 of 414,958 and 500,987 in 2013-14. However, little analysis can be done with these figures for a number of reasons:

- 28% of museums who responded didn't collect these figures and therefore didn't report on them
- Of the museums that did respond with figures, 22% were estimating the number of children
- Of the museums who responded with figures, 19 reported increases, 19 reported falls in children and young people visiting, and two reported no change

Two-thirds of museums were able to give figures for the number of CYPs visiting in organised groups, 90% of these figures were accurate rather than estimates. A smaller number of museums were able to give figures for the number of CYPs participating in outreach activities, with only two-thirds of these able to give accurate figures rather than estimates, and an even smaller number of museums reported on adult outreach numbers, and with a lower degree of accuracy (60%).

The absolute number of CYPs and adults in each category are outlined below:

	2014-15	**2015-16**
CYPs overall	450,145	422,142
CYPs in organised groups	358,083	349,823
CYPs outreach	58,363	55,298
Adults outreach	64,484	69,216

The number of CYPs in organised groups, CYPs outreach and adults outreach are up considerably on 2013-14 figures.

Recording segmented visitor figures is difficult to do, particularly for museums which don't charge as they can't track visitor figures through admissions data, and an informed estimate might be the best achievable for some. Other museums are managing to capture visitor data accurately so there are ways of working, tools and techniques available to record visitor figures.

The survey did not ask for data on people visiting within family groups, but some museums may have this data through various audience data collection programmes.

There are obviously some museums which are doing outreach activities and are unable to show funders and other stakeholders the impact of that work if they are not recording basic data about participation levels.

5.4 Visitor data for planning - Knowing Your Audiences

A small number of museums do not know their basic visitor figures, and others are not capturing specific data such as children, school groups or outreach activities, all of which are key statistics for funders. Museums with only limited statistical data may not know who their core audiences are, which limits their ability to plan programmes for their existing audiences or to attract new ones. It is also now a requirement for Accreditation, as part of the forward planning process, to know who your key audiences are.

MDNW action

Support museums through a continuing "Knowing Your Audiences" programme so 100% of North West Accredited museums are aware of the options available to them to use audience data collection in their planning

A new question was added this year, asking museums about the different types of methods they used to gather audience data. The most popular, in order, were:

- Door clicker/head count
- Numbers through admissions/till
- Viewpoint
- In-house paper based survey
- External market research
- Visitor Finder
- In-house online survey
- Other
- Culture Metrics
- Visitor Verdict

Other methods used were web analytics, Trip Advisor, school booking data and a mailshot survey.

These methods are a mixture of statistical counting and qualitative assessment. Most museums used a combination of one or two statistical measures with one or two qualitative measures. The most popular combination was to use one statistical method of audience data collection combined with one or two qualitative methods, which 56% of respondents used.

5.5 Consulting with non-users

We also asked a question for the first time about how museums consult with non-users, as this is an Area for Improvement that comes up frequently. 54% actively consulted with non-users. 19% did not consult with non-users in any way (despite it being a required element of the Accreditation standard) and 27% didn't answer the question.

Popular responses to this were to use social media, websites, newsletters and the press for publicity. These are predominantly tools for marketing to non-users rather than consulting with them, although they can be used to track effectiveness in turning non-users into visitors.

Some used their membership of networks such as the Museums of Cheshire (MOC) or Pennine Lancashire Museums (PLM) or carried out leaflet swaps to market to a wider audience. Both MOC and PLM have in the past been able to put in place systems to track the effectiveness of signposting visitors to other museums within their networks.

Some have commissioned external market research, either at regular intervals or for a specific piece of project-related research e.g. for a HLF project.

Surveys have been emailed to non-users or used as hard copy at outreach events; questionnaires have been carried out in town centres and markets.

Focus groups have been used, especially at the beginning of externally funded projects, run both inside and outside of the museum. Museums have consulted with non-users by visiting them in their own setting, by being invited to talk at forum meetings, or visiting community groups to give presentations and using handling objects.

Networking, personal contact and informal discussions are also used as methods of consulting with non-users.

5.6 Impact of museums

The data collected through the survey was used to calculate museums' contribution to the local economy using AIM's economic impact toolkit[9], measured using Level 1 economic value of visitors calculations, including local area visitor spend assumptions broken down by county.

In 2014-15 North West museums contributed **£143,238,320** to the regional economy, and in 2015-16 this increased to **£156,668,460**. In times when museums are having to make their case for funding more forcefully than ever, these are powerful figures of impact to which to point funders and stakeholders.

[9] http://www.aim-museums.co.uk/content/research_papers/

6. Resources

Financial information has been given at either an "individual" level for single service museums, or at "museum service" level for multiple site services. We asked for figures from each museum's last two full financial years. Each museum reported back on their own financial year, which differs from service to service.

All financial details have been anonymised and individual museums are unidentifiable in the analysis. The financial data obtained through this survey should be used with care and as a guide to general trends rather than taken as definitive figures.

6.1 Charging models

The survey asked, "Does your museum charge for admission?" In addition to the given responses we did our own research, taken from museum websites, to compile a comprehensive list of museums which charge and those that don't, and how much they currently charge (prices correct October 2016)[10].

Charging models for North West museums

	Charging	**Free**	**Unknown**
Cheshire	12	6	3
Cumbria	22	5	0
Greater Manchester	10	27	5
Lancashire	16	15	2
Merseyside	5	13	4
Total	65	66	14
Percentage	45%	46%	9%

[10] We have used the standard adult charge, not concessions, special offers or combined tickets for multiple sites. For some sites one admission gives entry for a year. For those who charge, sometimes local residents or children go free. If a museum is usually free but charges for special exhibitions or events we have counted them as free general admission

The "unknowns" are museums where we couldn't find out from the museum's website if they charged or not. Our assumption was that they didn't, but it would be a good marketing tool to make it clear on the website that the attraction is free. Assuming that all the "unknowns" don't charge, then the number of free museums becomes **55%**.

Of those that charge:

	£5 or less	More than £5
Independent	16	17
Local authority	15	3
National Trust	0	11
English Heritage	0	3

Within these figures:

- The number of museums that charge hasn't changed significantly since the 2013-14 survey in which 44% of museums charged compared to 45% today, with a number of museums classed as "unknown" each time
- 48% of museums charge £5 or less, 52% charge more than £5; in the 2013-14 survey the corresponding figures were 57% and 43% respectively, so the general trend has been for admission prices, where charged, to increase
- National Trust properties charge significantly higher entrance fees than others and two out of the three English Heritage Accredited properties in the region have moved into the higher admissions bracket from 2013-14; if National Trust and English Heritage sites are removed from the calculation, then **57% of museums that charge have an admission fee of less than £5**, down from two-thirds of museums in 2013-14

There are regional variations:

- There remains a significantly higher proportion of free museums in Greater Manchester and Merseyside
- Lancashire has a roughly 50/50 split of free and charging museums (the figures reflect the situation in 2014-15 and 2015-16 when Lancashire County Council-run sites which have since closed were operating normally)
- Both Cheshire and Cumbria have a higher proportion of museums which charge admission (and a corresponding high number of independent museums)
- Independent Cumbrian museums tend to charge more (53% of the 17 independent museums that charge £5 or more are in Cumbria, although this has come down from 62% in 2013-14) whilst in Cheshire (excluding National Trust and English Heritage properties) half of museums charged less than £5 admission fee whilst half charged more, although the range was narrow, from £3 to £7.40. Most charges are just under or just over the £5 mark
- In 2013-14 the exception to higher historic house charges was in Cumbria, where half of English Heritage and National Trust Accredited sites were £5 or less; in 2016 all these sites charged £5 or more
- Local authority museums which charge are clustered in Greater Manchester and Lancashire

6.2. Charge versus value

There does exist anecdotal evidence to suggest that at the lower end of the charging scale, which many of our museums are at, there may be sufficient elasticity in price to increase admission fees without affecting visitor numbers. In some cases this could even increase numbers as visitors perceive an increased value to the visit.

There is no recommendation or uniform solution on the best charging model. It is for each museum to decide and depends on a multitude of factors including the museum's location, size, audience, competing attractions (museums and non-museums), repeat visits, how the museum is perceived in the local community, if the museum has previously charged etc, but in their forward planning museums could consider the effectiveness of their charging model and whether or not there is scope for change.

AIM's national research in 2016 on the impact of charging[11] listed as its key findings (reproduced here with kind permission from AIM):

- There are no defining characteristics that distinguish charging or free entry museums, and the picture is much more complex than often assumed, since one in three independent museums are free entry and one in three local authority museums charge for admission
- There is no direct link between the diversity of audiences and whether a museum charges for admission or not, with the pattern in terms of social mix being very similar. However, such a finding needs to acknowledge that the general social mix of museum visitors is not always representative of the wider social mix within their communities
- Donations are more affected by a range of other factors than by whether museums charge for admission or not
- There is no consistent relationship between levels of secondary spend and whether a museum charges admission, with other factors having much more influence. However, some evidence has emerged showing visitors to charging museums are more likely to have visited the shop (or used on-site catering), than visitors to free entry museums
- Dwell times are typically longer for museums that charge for admissions
- The process of charging creates a focus for the visitor welcome and captures information about visitors. Where museums are free entry, alternative approaches are required for these elements
- In making any changes it is especially important to communicate clearly with stakeholders and the local community about the reasons for the changes and to ensure that staff are positive and confident in explaining them to visitors

[11] Key findings and publications available from www.aim-museums.co.uk/content/evaluating_the_evidence_the_impact_of_charging_or_not_for_admissions_on_museums/

6.3. Core and project income

An analysis of expenditure against core income and project income, based on the figures given, shows that in each of the two financial years reported on, for 12 independent museums their core and project income exceeded their expenditure. For another five independent museums their core and project income alone was insufficient to cover their expenditure, but in each year they raised enough income through retail, donations, income from school visits and events to turn the loss into surplus.

Apart from two smaller services, all local authority museums reported deficits, with income raised from retail, donations, income from school visits and events insufficient to plug the funding gap between core and project income and expenditure. With the exception of one museum, the deficit ran into six or seven figure totals.

These figures on their own should not be taken as a definitive picture of museums' ability to be financially resilient. There is clearly an issue, particularly with local authority museums, in accounting for all spend in a simple income/expenditure equation and some sources of income have obviously not been included here. It's possible that local authority museums have budgets accounted for elsewhere within Council financial systems and not reported here, which may be indicative of the difficulty local authority museums have in planning their budgets given the complexities of how local authority finances are structured (for example, in the case of one local authority museum income from schools returns into the central local authority budget rather than go specifically to the museum so there is no correlation between the income generated and amount invested back into the museum).

Due to the number of museums that reported particularly low income figures, which may be missing some sources, we haven't compared statistically how much museums rely on project income to supplement their basic income, but it appears to vary from museums with no additional project income to those where the additionality makes up a large part of their income.

MDNW action

Continue to deliver programme of support around ACE Goal 3, resilience, in 2018-22

6.4 Generating additional income

92% of respondents have access to a room or other space in the museum separate from exhibition space to use for meetings, activities, school visits or other groups. For the vast majority of museums there is the ability, however large or small, of offering additional services (and generating income) which do not impact on the experience of visitors to the main exhibition spaces.

Balancing the need for preservation of collections and buildings, maintaining the usual offer for visitors and generating income has always been a delicate act. The opportunities and obstacles to a museum hosting events are unique to each museum but there are resources and guidance available such as the MA's Museum Practice (February 2014), AIM's Successful Venue Hire & Corporate Hospitality Success Guide (2013) and the National Trust's Practical Conservation Guidelines for Successful Hospitality Events in Historic Houses (2004). In 2015 AIM also published a new Quick Guide – Donation Boxes in Museums (2015), with up to date figures and practical advice.

The tables overleaf show the amount of additional income from retail, donations, events and schools in 2015-16 (or year 2 of whichever year museums have reported on, depending on their financial calendar), rounded up or down to the nearest thousand. The table from 2013-14 is also provided for comparison.

The income from donations is interesting. It has gone up over ten-fold in Cheshire, has remained fairly constant in Greater Manchester and Cumbria and has declined in Lancashire. However, when a calculation was made to find the average donation per visitor in each museum, the same pattern was seen across Cheshire, Greater Manchester and Lancashire – museums that charge an admission fee also have a considerably higher average donation per visitor than museums that don't charge admission. In Cheshire the average donation per visitor for charging museums was £1.23, for non-charging it was 16p. In Greater Manchester the average donation per visitor for charging museums was £7.03, in free museums it was 9p. The only museums in Lancashire for which we had figures for donations were all free; the average donation per visitor was 7p.

In Cumbria, however, the pattern isn't as clear. One museum reported no donations given in the last year and so wasn't included. Of the two museums that were free, one had an average donation of 21p per visitor, the other of £1.40. Of the other museums in Cumbria, which all charged an admission fee, average donation ranged from 11p to £6.86. The average donation was £1.39 per visitor, but if the £6.86 figure is removed, which was much higher than the second highest figure of £1.53, then the average donation is 71p.

Our analysis reinforces one of the key findings from AIM's report on charging models, namely that donations are more affected by a range of other factors than whether a museum charges for admission or not[12]. However, an unexpected pattern of increased donations in admission charging museums appear strong in some of our counties and may warrant looking at in further detail. It may reflect the "charge versus value" debate mentioned in 6.2 in this report and also in the previous benchmarking report.

AIM's findings also showed that spontaneous donations commonly decreased when moving from free to charging[13]. None of our museums surveyed had recently made a change from charging to free or vice versa, so their figures reflect trends in established models of admission.

Additional income 2015-16

	Retail	Donations	Events	Schools	Total
Cheshire	217,000	144,000	256,000	120,000	737,000
Cumbria	774,000	229,000	192,000	22,000	1,217,000
Greater Manchester	909,000	454,000	380,000	172,000	1,915,000
Lancashire	279,000	18,000	352,000	19,000	668,000
Merseyside[14]	Not available	Not available	Not available	Not available	Not available

[12] www.aim-museums.co.uk/content/evaluating_the_evidence_the_impact_of_charging_or_not_for_admissions_on_museums/

[13] www.aim-museums.co.uk/downloads/2c702235-743f-11e6-9df2-901b0e0dc93a.pdf

[14] National Museums Liverpool didn't supply figures for this year, leaving only Port Sunlight to provide figures for Merseyside

Additional income 2013-14

	Retail	Donations	Events	Schools	Total
Cheshire	693,000	13,000	702,000	146,000	1,554,000
Cumbria	353,000	197,000	29,000	9,000	588,000
Greater Manchester	1,406,000	545,000	808,000	161,000	2,920,000
Lancashire	113,000	46,000	48,000	10,000	217,000
Merseyside	1,361,000	209,000	856,000	3,000	2,429,000

Cumbria and Lancashire's retail figures have both more than doubled. Cheshire's retail figures look to have fallen dramatically, but Tatton Park's retail sales accounted for the bulk of the 2013-14 figure and were not provided for 2015-16. With them removed, Cheshire's collective retail figures have gone up considerably year on year. The same reason has skewed the events figures for Cheshire.

Both Lancashire and Cumbria have seen huge increases in the amount of money they generate from events. Greater Manchester has seen a fall in the income from events, but is still raising more funding from this than any other county in the North West.

We think the amount of income generated from school visits has been under-reported in both Cumbria and Lancashire. The de-delegated budget which the Heritage Learning Team at Lancashire County Council receives from primary schools in the county effectively pays upfront for some school delivery at Lancashire County Council-run museums. Of those museums that participate through this system, we also think they may have only reported on the 10% of income that comes to them directly from a school visit, the rest going to the Heritage Learning Team to cover costs of delivery. This arrangement holds prices for school visits low, and it may be that other museums in Lancashire have to follow to remain competitive.

The following list provides an insight into the types and range of funding attracting museum support in the region:

Local government grants, sponsorship and subsidies	**Other sources**
– local authority funding – rent, rebate and maintenance subsidies	– ERDF – European Union funding – Leverhulme Trust – Magna Carta Trust
Arts/heritage funding – Army Museums Ogilby Trust – Arts & Humanities Research Council – Arts Council England – Association of Independent Museums – British Museum - Portable Antiquities Scheme – DCMS – Esmée Fairbairn Foundation – Garfield Weston Foundation – Heritage Lottery Fund – MDNW Sustainable Improvement Fund – NADFAS – Paul Mellon Studies in British Art – Pilgrim Trust – V & A Purchase Fund – Wellcome Trust – Wolfson Trust	**Local/regional funding** – Big Local (Community Development Foundation) – Coastal Community Fund – Connect Cumbria (Learning Network) – Copeland Community Fund – Cumberland and Westmorland Antiquarian and Archaeology Society – District & Connexional funding (Methodist Church) – Liverpool City Council Community Covenant Grant – Local authority public health department
Various Friends groups, commercial sponsorship and individual private donors, bequests	

6.5. Staff and volunteers

31 responses were received, one answer was not included as expenditure on staff was reported as outstripping total expenditure.

In comparison to the 2013-14 survey, an increasing number of museums are now spending a larger proportion of their income on staff salaries. In 2013-14:

- 8% spent less than 30% of annual expenditure on staffing costs
- 27% spent between 31% and 50%
- 44% spent between 51% and 70%
- 19% spent between 71% and 100%

In 2014-15 the middle figures have been reversed:

- 10% spent less than 30% of annual expenditure on staffing costs
- 42% spent between 31% and 50%
- 29% spent between 51% and 70%
- 19% spent between 71% and 100%

In 2015-16 there was some levelling off, with 6% spending less than 30% of expenditure on staff, 16% spending between 71% and 100%, and an increase to 35% of museums spending between 51% and 70% on staff costs.

Across the comparison years the number of people employed in museums has fluctuated, but so too has the number of museums reporting these figures. Consequently it has been difficult to draw any conclusions from these numbers.

There were no patterns found when examining the percentage of staff costs against visitor numbers, or the type of museum against percentage staff costs.

	2013-14	**2014-15**	**2015-16**
Full time equivalent staff	899	817	925
Full time equivalent project posts	69	54	51

For every one member of staff employed by a museum, museums collectively received 6,769 visitors, up slightly from 6,715 in 2013-14[15].

Staff costs remain the biggest proportion of expenditure. With museum budgets being cut, staff are being increasingly required to take on responsibility for a wider area of service delivery, at all levels of experience.

MDNW action (from 2013-14)

In a future survey look at museum attitudes to investment in staff/volunteer CPD – has reduced capacity made it more difficult to attend training or are staff being more encouraged to diversify their skills base?

Collectively, museums have **2,461 active volunteers**, contributing **149,660 hours** or **90.7 FTE posts[16]**. The total number of hours given by museum volunteers can be expressed as a financial value and the method advocated by Volunteer England has been applied[17]. 149,660 hours equates to volunteers contributing **£1,587,892** of financial value of their time to museums.

[15] Based on 2015-16 visitor figures

[16] Based on 1,650 working hours per year

[17] Based on a value between the national minimum wage (£6.70 for workers over 21 years old from October 2015) and the median hourly wage (£14.27 in April 2015, Office for National Statistics). In this instance the hourly rate is therefore taken to be £10.61

7. Collections

7.1 Collections

Museums were asked to define their collections according to the following sizes, based on the SHARE Museums East categories:

- under 1,000 objects
- 1,001-5,000 objects
- 5,001-50,000 objects
- 50,001-250,000 objects
- over 250,000 objects

Nearly two-thirds of collections fall within the two categories 5,001-50,000 and 50,001-250,000. These categories are so broad it has been difficult to make any meaningful comparisons with them, but some general observations have been made. Collections of under 1,000 objects tend to belong to historic houses; these are fairly compact discrete collections to begin with, and the potential to add to them is limited. The larger collections are clustered within Greater Manchester and Merseyside. 70% of collections containing 5,001 to 50,000 objects belong to independent museums; over 60% of the larger collections of 50,001 to 250,000 objects or more than 250,000 objects (excluding those from National Museums Liverpool) belong to local authority museums or former local authority museums which have now gone to trust.

Rate of acquisitions and disposals

Museums were asked about the number of objects they had acquired and disposed of in the past year. Most had acquired between 1 and 50 objects.

Number of acquisitions

Number of objects acquired	**0**	**1-50**	**51-100**	**101-200**	**201-300**	**300+**
Number of museums	4	23	7	6	1	4

If the middle number from each category (i.e. use 25 from 1-50 range) is taken as the average number of objects acquired, and multiplied by the number of museums, then collectively the museums have acquired approximately **3,450** objects.

Total number of disposals

Number of disposed objects	0	1-10	11-20	21-50	51-100	100+
Number of museums	31	9	3	1	0	1

If the middle number from each category is taken as the average number of objects disposed of, then collectively the museums have disposed of approximately **243** objects in the same period.

If the statistics from the museums responding to the survey are representative of the region, then collectively museums are **acquiring objects at approximately 14 times the rate of disposal.** This is an improvement from the findings from the 2013-14 survey which recorded a rate of acquisition 60 times greater than the rate of disposal, but this is still not a sustainable figure given the constraints on museum resources.

MDNW action

From 2018 implement a collections development programme to include sustainable collecting, responsible collections management, collections reviews and rationalisation

7.2 Storage

Of all the museums that completed the survey, only Manchester Museum, Wordsworth Trust and the Dock Museum in Barrow reported that their collection stores had room to grow in the next 5 to 10 years. Of other replies regarding stores:

- 42% are currently overfull
- 40% are now full
- 11% will be full in 5 years
- 7% will be full in 5-10 years

Of the museums with stores that are currently full or know they will be in 5 years time, 55% had a plan to deal with the overcrowding.

7.3 Loans

New questions were asked about loans, in light of the availability of ACE's Ready to Borrow funding for regional museums to borrow loans from national museums.

19 museums had not requested any loans from other institutions in the past year. Of the 17 that had, 14 had all their requests agreed to by the lending organisations (ranging from 1 to 14 loans), one museum had their only loan request turned down, and two museum services which made multiple requests for loans were successful in 70-80% of the loans requested.

Of the museums which responded and are eligible to apply for Government Indemnity (GIS) for loans:

- 9 already have GIS
- 13 don't have it but are working towards it
- 15 do not have it and do not intend to work towards it

MDNW action

Work with ACE-funded Ready to Borrow programme, Collections Trust, Touring Exhibitions Group, national museums and other bodies to promote opportunities for museums to achieve Government Indemnity and increase the number of significant loans coming into the region

8. Regional support

Of the 56 museums which replied, in the last year:

- 75% had attended training provided by MDNW
- 21% had attended training provided by the Association of Independent Museums
- 21% had attended training provided by the Collections Trust
- 21% had attended training provided by Curious Minds
- 18% had attended training provided by the Museums Association
- 4% had not attended any training

Other training attended included that provided by:

- Arts Council England
- Audience Agency
- Autism awareness
- Creative Tourist
- CVS
- Deafway
- GEM
- Lancashire Conservation Studios
- Liverpool University
- Manchester Metropolitan University
- Museums of Cheshire
- St John's Ambulance
- Working Internationally in the Regions (WIRP)

MDNW action

Build museums' suggestions for future support into the planning of our training programmes, 2017-18 and 2018-22

9. Children and young people

This section was added to give a snapshot of museum practice at a given moment, and will be changed for the next survey. In 2013-14 we asked about digital provision, in this survey we asked about museums' relationship with Curious Minds, the Bridge organisation.

9.1 Awareness of Curious Minds

56% of the 43 museums which responded to this question had already connected with Curious Minds and knew what the Bridge's role was in the region. 20% knew about Curious Minds but wanted to know more about their work. 12% already knew about them but didn't want to know any more, whilst another 12% hadn't heard of Curious Minds and wanted to know more about them.

9.2 Arts Award

As a regional Bridge organisation, Curious Minds works with Arts Council England and Trinity College London to support the Arts Award programme. Of the museums which responded:

- 14% of museums consider themselves to be delivering Arts Award successfully
- 37% are already offering it but feel that they could do better
- 21% know about Arts Award and would like to offer it
- 16% know about Arts Award but don't want to offer it
- 12% of museums haven't heard of Arts Award

There is still a huge amount of potential here for MDNW to raise awareness of the role of Curious Minds and the support they can give to museums.

9.3. Support for museums

When asked how best Curious Minds could help to support or facilitate the promotion of museums to schools, the three equally popular responses were:

- providing face-to-face "market place"-style events where schools can meet with museums
- through facilitating or delivering presentations at schools' regular meetings and networks
- online through searchable databases that allow schools to find out about their local cultural offer

Other suggestions put forward by museums included working with a local specialist teacher who can signpost a museum with a project to a likely teacher, information about TeachMeets or parent coffee mornings, or commissioning qualified learning staff to deliver Arts Award in museums.

MDNW action

Continue to work with Curious Minds to promote the opportunities the Bridge organisation can provide museums for strengthening their offer to children and young people

9.4 Changing offer

93% of museums were able to report that their ability to support school children to access learning opportunities at the museum was either stable or improving. Only 2% reported a decline in their schools offer and 5% didn't have an offer for schools.

In 2016 MDNW sat on the steering group for a report commissioned by Curious Minds which responded to a piece of research carried out by CapeUK on behalf of ACE into formal learning in museums. Whilst the CapeUK research gave a snapshot of formal learning provision in museums in 2016, the subsequent Curious Minds report, "Making Formal Learning in Museums Sustainable"[18], focused on detailed examples of sustainable practices and new and emerging business models for learning delivery.

72% of museums were also able to report that their ability to support families and young people outside of school hours to access learning opportunities at the museum was either stable or improving. 9% reported a decline in their offer for families and young people, and 19% didn't have a family offer.

MDNW action

In 2018-19 and 2020-21 support museums through our new "Family Friendly" programmes

[18] http://curiousminds.org.uk/wp-content/uploads/2017/02/H5263_Curious-Minds-Formal-Learning-Museum-Report-FINAL.pdf

10. Summary

Audiences

- **6,606,982** people visited in 2015-16, compared to **6,058,741** in 2014-15, with an overall increase of **9%.** Whilst the overall regional figure is similar to visitor figures in 2012-13 and 2013-14, at an individual level museums are seeing greater variations of change in visitor numbers. The headline regional figures are dependent on visitor numbers at a small number of large museums
- There is still a need to support museums to find more robust ways of collecting visitor data, from basic visitor numbers to capturing the impact of outreach activities
- North West museums contributed over **£156,000,000** to the regional economy in 2015-16

Resources

- There is a roughly even split of museums which charge and those that are free. Excluding National Trust and English Heritage properties, **57% of museums that charge have an admission fee of less than £5**
- It is easier to interpret financial data from independent museums than local authorities, which may be a reflection of the more complex financial systems which local authority museums have to work within and which may make it harder for them to plan their budgets
- Museums are dependent on project funding and generating additional income to fill the gap between core income and expenditure. However, **92%** have access to a space to use for income generating activities
- Museums that charge for admission also appear to generate larger donations
- Investment in staff remains the biggest expenditure for museums
- Volunteers remain a valuable source of support; collectively museums have **2,461 active volunteers**, contributing **£1,587,892** of financial value

Collections

- Museums are acquiring objects at **14 times** the rate of disposals
- Storage is at a critical point – only three museum services won't have a full store in 10 years time, 45% of museums don't have a plan to address this
- Over half of the museums had not requested a loan from another museum
- 35% of respondents would like to achieve Government Indemnity conditions

Children and young people

- There is still huge potential for museums to work more effectively with Curious Minds
- Schools' offer and the family offer in museums is **generally stable or improving** despite budget cuts, although one-fifth don't have a family offer

Appendix A - List of museums returning completed surveys

Cheshire	
Catalyst Science Discovery Centre	The Old Sunday School Heritage Centre, Macclesfield
Chester History & Heritage	Paradise Mill, Macclesfield
Congleton Museum	Silk Museum, Macclesfield
Deaf Museum & Archive, Warrington	Stretton Watermill
Englesea Brook Chapel & Museum	Tatton Park
Grosvenor Museum, Chester	Warrington Museum & Art Gallery
Lion Salt Works	Weaver Hall Museum & Workhouse
National Waterways Museum	West Park Museum, Macclesfield
Norton Priory Museum & Gardens	
Cumbria	
Abbot Hall Art Gallery	Keswick Museum & Art Gallery
Armitt Museum & Library	Museum of Lakeland Life & Industry
Beacon Museum, Whitehaven	Millom Discovery Centre
Blackwell, the Arts & Crafts House	Penrith & Eden Museum
Brantwood	Quaker Tapestry Museum
Dock Museum, Barrow	Ruskin Museum
Helena Thompson Museum	Tullie House Museum & Art Gallery
Kendal Museum	Wordsworth Museum & Dove Cottage
Greater Manchester	
Astley Cheetham Art Gallery, Tameside	Museum of Transport, Manchester
Bury Art Museum & Sculpture Centre	Ordsall Hall
Central Art Gallery, Tameside	Peoples' History Museum

Manchester Art Gallery Manchester Jewish Museum Manchester Metropolitan University Special Collections Manchester Museum Museum of the Manchester Regiment, Tameside	Portland Basin Museum, Tameside Rochdale Pioneers Museum Salford Museum & Art Gallery Touchstones Rochdale The Whitworth
Lancashire Astley Hall Museum & Coach House Clitheroe Castle Museum Cottage Museum, Lancaster The Duke of Lancaster's Own Yeomanry Museum Fleetwood Museum Harris Museum & Art Gallery Helmshore Mills Textile Museum Higher Mill Trust Museum Museum of the King's Royal Hussars in Lancashire	King's Own Royal Regiment Museum Judges' Lodgings Museum Lancashire Infantry Museum Lancaster City Museum Lancaster Maritime Museum Museum of Lancashire Queen Street Mill Textile Museum South Ribble Museum & Exhibition Centre Towneley Hall, Burnley
Merseyside The Atkinson, Southport International Slavery Museum Lady Lever Art Gallery Merseyside Maritime Museum Museum of Liverpool	Port Sunlight Museum Seized! The Borders and Customs Uncovered Sudley House Walker Art Gallery World Museum Liverpool

Acknowledgements & credits

Images

Astley Hall, (p2, top), Cumbria's Museum of Military Life (p2, second), Dock Museum, Barrow (p39), Englesea Brook Chapel and Museum (p2, bottom), MDNW funding fair 2014, Peoples' History Museum (p2, third), Museum of Transport, Manchester (front cover)

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http://curiousminds.org.uk/wp-content/uploads/2017/02/H5263_Curious-Minds-Formal-Learning-Museum-Report-FINAL.pdf


Stone Axe
Blood Axe
Conquest
BARROVIAN