Museum Development North West

Annual benchmarking survey report 2018-19

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Contents

1. Introduction

This report summarises the findings of the fourth regional benchmarking survey of North West museums, covering the period 2018-19. 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 surveys.

For the 2017-18 survey Museum Development North West (MDNW) commissioned South West Museum Development (SWMD) to carry out both the data collection and the reporting. For this survey, SWMD carried out the data collection, MDNW analysed and reported on the data.

An online survey was sent to all 148 Accredited museums and museums officially working towards Accreditation in the North West, as recognised by Arts Council England (ACE) in June 2019. The return rate was **45%**.

The sections in the survey were:

1) Museums
2) Audiences
3) Resources (finance, staff and volunteers)

For MDNW's first two surveys, covering 2012 to 2016, there were also questions about collections and access to training, plus a flexible section which changed each year to give a snapshot of a specific issue. Since 2018 each of the English museum development regions has been using the same survey to allow national comparisons, and so these sections have been removed to bring MDNW's survey in line with other regions.

In 2020 ACE contracted a consultant to carry out a review of the benchmarking survey to inform its future purpose and how it is carried out in subsequent years.

2. Limitations and assumptions

The response rate was 45%. 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. There are variations in the percentage of museums responding from each of the North West counties and data from some of the larger national museums is missing.

This report does not attempt to be a professional statistical analysis; instead it gives a base to work for future surveys and enable some comparisons with past findings. Each year the number of Accredited museums and those officially working towards Accreditation in the North West varies so there is no consistent baseline figure across the surveys to compare. Each of the four surveys has had a different response rate and different museums fill it in each year, with varying degrees of completeness. Only a small number of museums and multi-site services have submitted a full and complete survey each year we have carried it out to enable us to analyse some longitudinal data, and we are very grateful to these.

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 in person. We have not attempted to measure, for example, the impact of university museums on undergraduate and postgraduate research.

The statistics on museums' contribution to the local economy in the report were calculated by SWMD using the Association of Independent Museums' (AIM) economic impact toolkit (2014), 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. AIM published an updated version of the economic impact toolkit in October 2019[1] with revised spend assumptions but for this report the original version has been used to ensure consistency with benchmarking surveys in other museum development regions.

[1] Economic Impact Toolkit 2019, AIM, https://www.aim-museums.co.uk/wp-content/uploads/2019/10/Economic-Impact-Toolkit-2019.pdf

3. Update on 2017-18 report

In the 2017-18 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 or biennial survey to track trends in visitor numbers

This is the fourth survey. With the exception of 2016-17 we have yearly data going back to 2012. It is a requirement of our funding from ACE that we carry out the survey as stipulated in our agreement with them. ACE has contracted a consultant to carry out a review of the benchmarking survey to inform how it is carried out in the future.

2) Recommendation for museums - Museums without accurate mechanism for counting total visitors look to find one by 2020

8% of the museums that responded are still estimating visitor numbers.

3) Support museums through Goal 2 programmes so all North West Accredited museums are aware of the options available to them to use audience data collection in their planning

In 2019-20 we initiated the ‘Audiences Champions’ national pilot programme with The Audience Agency and the Museum Development Network (MDN); this will carry on through to 2020-21. We may also run a second programme in the future. In 2020-21 we will identify a number of North West museums to take part in the ‘Impact and Insights’ pilot national programme.

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

In 2018 we held our funding fair for the sixth time and worked with organisations such as AIM and National Lottery Heritage Fund (NLHF) to run workshops around fundraising and resilience. In 2019 our funding fair changed format to concentrate on the new funding streams from ACE and NLHF, as well as providing one-to-one bespoke support for museums to work up applications for funding. In 2020 we have worked with AIM, Charity Finance Group, Museum Development Yorkshire and Museum Development North East to set up a museum finance special interest group for the North of England. In 2020-21 we will be delivering a programme to support organisational resilience and development using the MDN ‘Organisational Health Check Tool’ for museums as part of a national pilot.

5) Recommendation for museums – review museum website to ensure basic visitor information, including if the museum charges or is free, is easy to find on the homepage

In 2016 seven museum websites didn't make it clear whether or not they charged for entry, in February 2020 the number was 20.

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

Since 2017 we have been working with Collections Trust to deliver open workshops on Spectrum and documentation as well as closed programmes specifically for museums to tackle their documentation backlogs as part of responsible collections management. In 2020 we will continue working with Collections Trust.

In 2018 we ran the first phase of our 'Re:collections' contemporary collecting programme which is now in its second phase. Alongside this we have worked with museums to review and make more use of their natural history collections to coincide with Dippy's visit to the North West in spring 2020. In 2020-21 we will also be introducing a new programme about enriching existing collections.

7) Build museums' suggestions for future support into the planning of our training programmes, 2019-22

We ask for feedback from museums after open workshops and as part of our closed development programmes. This feedback is used as part of our planning processes.

On a broader level ACE has commissioned external consultants to evaluate the impact of the national museum development programme from 2015 to 2022. All North West museums have been invited to take part in a survey as part of the evaluation process.

8) 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

We are a partner in the NLHF-funded 'Kick the Dust' project led by Curious Minds, and have worked with them to deliver our university placement programme; and we both support SMILE science Continuing Professional Development events.

4. Museums

Rate of return

A full list of the museums that returned the survey is included as Appendix A. The tables below show that respondents fairly evenly represent all governance types in the North West, except for National Trust and English Heritage. Of the counties, Merseyside had the strongest rate of return whilst the lowest was Lancashire.

Museums responding, by location

	Number of responses	**Percentage return**
Cheshire	12 from 25	48%
Cumbria	13 from 27	48%
Greater Manchester	16 from 42	38%
Lancashire	8 from 33	24%
Merseyside	17 from 21	81%
Total	66 from 148	45%

Museums responding, by type of museum

	Number of responses	**Percentage return**
Independent	32 from 65	49%
Local authority	21 from 48	44%
National	8 from 11	73%
University	5 from 9	56%
National Trust[2]	0 from 13	0%
English Heritage	0 from 2	0%

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

Museums responding, by size

SWMD categorised museums, depending on their visitor numbers, into:

- small museums (9,999 and under visits per annum)
- medium museums (10,000 – 49,999 visits per annum)
- large museums (50,000 – 99,999 visits per annum)
- extra large museums (100,000+ visits per annum)

These categories have been used throughout the analysis.

The return rate broken down by size was:

Size of museum	**Number of respondents**
Small	19
Medium	25
Large	7
Extra large	15

5. Audiences

This section looks at overall visitor figures and, where figures have been provided, visits by children, participants in on-site education sessions, other on-site sessions and off-site participation.

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

In our 2017-18 report there were a total of **8.3m** visits made to North West museums based on responses received. The figure for 2018-19 from responses received is **7,504,902**, but we received a lower response rate to the survey this year and some figures from the larger museums in the region are missing. For those missing responses, if we included in the same visitor figures as they reported in 2017-18, total visitor figures for 2018-19 would be more likely in the region of **9.5m**.

Within the North West totals, the statistics are heavily influenced by a small number of the biggest museums, which account for approximately 60-75% of total visitors to North West museums. Large swings either way for these museums will have a dramatic impact on the regional numbers. In previous surveys we have looked in more detail at the changes in visitor figures for the largest museums, but there are too many missing from this year's survey to be able to make a worthwhile comparison.

The table below shows the number of responses and reported total visitor figures for each year our survey has been carried out.

Year of survey	Number of responses[3]	Total reported NW figures
2012-13	53	6.8m
2013-14	51	6.5m
2014-15	75	6m
2015-16	75	6.6m
2016-17	No data collected	-
2017-18	84	8.3m
2018-19	66	7.5m (9.5m)[4]

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 increasing.

8% of museums completing the survey struggled to provide a definitive annual visitor figure, estimating the number of visitors, and others were unable to separate out visits by children or to quantify participation in specific activities.

Where museum visitor figures have shown significant fluctuations (either up or down) year on year and either we have reason to believe, or the museum has told us, that counting methods are inaccurate, we have included these in our overall figures but have not included them in any detailed analysis.

Recommendation for museums

Museums to review the accuracy of their methods of counting and recording visitor numbers

[3] Number of responses is the number of individually Accredited museums

[4] Figure is more likely to be in the region of 9.5m if we included the 2017-18 visitor numbers of the bigger museums which didn't respond to this year's survey

5.2 Visitor figures by type of museum

Visitor numbers by county

The visitor figures for some of the larger museums in Greater Manchester are missing for this year so it would be unfair to make a year on year comparison. The return rate for Lancashire museums in 2017-18 was 55% but only 28% in 2018-19 and the figures cannot be compared.

	2017-18	**2018-19**	**% change**
Cheshire	285,309	234,903	21% decrease
Cumbria	453,534	460,339	1% increase
Greater Manchester	-	-	Comparison not possible
Lancashire	-	-	Comparison not possible
Merseyside[5]	4,106,767	4,783,992	14% increase

Visitor numbers by governance type

Local authority museums

Of the single site local authority museums completing the full survey and not affected by closures due to refurbishment etc:

- Two reported increases in visitor numbers of 1% and 7%
- Three reported falls in visitor numbers of 1%, 8% and 13% from last year

One multi-site local authority service reported a 16% increase in numbers across its two sites. Another multi-site local authority service, where we had comparable accurate data from the previous year, reported a decrease of 4% across its sites, masking some significant increases in visitor figures in its two smaller sites, offset by falls in numbers at its two bigger sites. A third multi-site local authority, which has had various temporary closures and building works to its smaller sites, recorded a 6% drop in visitor figures at its main museum from the last survey, but an overall steady 14% increase in numbers at its main site from 2012 to 2019.

[5]Within National Museum Liverpool's total figures visits to the International Slavery Museum and Border Force National Museum are not counted as these venues are situated within Merseyside Maritime Museum. Visits to the Piermaster's House are also not included here

Independent museums

Of the independent museums with single sites that completed the survey not affected by redevelopment, partial closure etc:

- One reported no change in their visitor figures from last year
- Five reported increased visitor figures from the previous year, one with an increase of 17%, the others ranging from 1 to 9%
- Eight reported decreases in visitor figures from the previous year, one of 30%, one of 19%, one of 17%, the rest in the range of 1 to 10%

One museum was excluded as it made changes to its visitor counting method within this financial year.

Of multi-site independent museums, one reported an overall increase of 1% on last year's figures. Another reported an annual decrease of 18% across its three museums but this can in part be attributed to the concentration of resources in the run up to the re-opening of another site within its service.

Reasons for changes in visitor figures

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

- National events - previous surveys noted that national events such as the Olympics and the Queen's Jubilee impacted on museum figures. In 2018 the centenary of the end of the First World War had a similar effect, as did the lead up to John Ruskin's bicentenary year in 2019
- Hyper-local events were notable in the comments - public realm improvements, construction work in a near by car park and playground refurbishments immediately outside of a museum all impacted on visitor numbers
- One-off charges for special exhibitions reduced visitor figures slightly
- One museum felt that good summer weather contributed to increasing visitor figures

The flooding in winter 2015-16 and its impacts was previously noted by museums in Cumbria, Lancashire and Greater Manchester. Whilst this has had no effect on visitor numbers now, three museums reported that they are still being affected by the flooding in some way, including still paying for recovery or preventative work to be carried out.

5.3 Long term visitor figure trends

In our first survey looking at 2012-13 and 2013-14 figures, the majority of both 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 in the 2014-16 survey suggested the same, but the statistics for individual museums were different, showing a larger number of museums which saw bigger percentage swings either increasing or decreasing in their visitor figures.

In the 2017-18 survey, independent museums were demonstrating resilient visitor figures, with nearly half reporting increases or decreases within +/-5% of previous numbers. A quarter reported increases in visitors of between 11% and 36%. But the trend for bigger losses was also seen, with another quarter reporting decreases in visitor figures of between 15% and 19%. One museum's visitor figures reporting a three-fold increase were excluded as these were an estimate.

In 2017-18 local authority single site and multi-site services mainly reported losses, ranging from 5% to 42%. Only two museums reported increased visitor figures.

The picture this year is mixed, with the majority of independent and local authority museums that completed the survey reporting swings of +/-10% with occasional variations outside of this.

We have been carrying out this survey for a number of years, and we now have some longitudinal data from museums that have submitted figures to the survey each time we have requested it. For the first time we have looked at visitor figures across a four year period (2014-15 to 2018-19). These are only a small number of museums, and we have excluded those closed for major redevelopment or any other reason that would have affected their normal figures during this time, but from the museum data we do have, between 2014-15 and 2018-19:

Single site small museums (9,999 and under visits per annum)[6]

- Two museums saw increases of 6% (local authority) and 15% (independent). The local authority museum increased its visitor numbers by 30% overall between 2012 and 2019
- Two museums saw decreases of 11% and 12% (both independents)

[6] Definitions of small, medium, large and extra-large as defined by SWMD in their collection of and initial analysis of benchmarking data on behalf of MDNW

Single site independent medium museums (10,000 – 49,999 visits per annum)

- Two museums increased their visitor figures by 5% (one changed governance model in this period)
- One museum reported stable figures, with an increase of 1% overall
- One museum increased its visitor figures by 40%, partly attributable to increased numbers following a major refurbishment
- One museum reported a decrease of 3%
- Two museums reported sizeable decreases of 29% and 67%

Single site large museums (50,000 – 99,999 visits per annum)

- A local authority museum reported an increase of 3%
- An independent museum reported a decrease of 6%

A multi-site independent large museum service reported a decrease of 32%

Extra large multi-site museums (100,000+ visits per annum)

- National Museums Liverpool saw a 46% increase from 2014 to 2019, including the period the Terracotta Warriors were on show at World Museum Liverpool
- An independent museum service reported a 15% increase
- A local authority service reported a 10% decrease

5.4 Visitor figures by category

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

- children visiting the museum (under 16 but excluding under 5s)
- participants in on-site education sessions, and number of sessions delivered
- participants in off-site education sessions, and number of sessions delivered
- participants in other activities the museum delivered on-site, and number of activities delivered
- participants in other activities and outreach events the museum delivered off-site, and number of other activities and outreach events delivered
- different schools and formal learning organisations engaged

The total number of children visiting museums was recorded as **486,243** for 2018-19 but, of the 66 museums that responded to the survey, 15 recorded no response to the question and 12 didn't know their figures. Of those which did provide us with figures for the number of children visiting, 41% of these figures were estimates.

A long term view of visitor patterns has been difficult to establish because this is only the second time visitor figures have been asked for using this particular breakdown of categories, and this and previous surveys have shown that some museums don't record, or find it difficult to record, detailed breakdown of visitor profiles. Although 66 museums returned the survey, the biggest response we had to a question in this section was 56, and of those only 30 museums knew that their figures were accurate and not an estimate. Given the amount of estimates, unknowns and unanswered questions, we can only report given figures and not make any inferences from them.

	2018-19				2017-18			
Type	**No. of sessions**	**No.of museums**	**Total no.of participants**	**Average participants per session**	**No. of sessions**	**No.of museums**	**Total no.of participants**	**Average participants per session**
On-site education session	3,721	46	279,490	75	5,151	57	438,203	85
Off-site education sessions	1,936	45	58,911	30	1,069	40	84,771	79
Other activities on-site	3,737	56	430,660	115	3,671	49	276,570	75
Other activities off-site	976	43	45,977	47	871	37	39,997	46

2,063 different schools and formal learning organisations were engaged at 43 museums in 2018-19, averaging 48 per museum. In 2017-18 the number was 932 schools and formal learning organisations engaged at 32 museums, averaging 29 per museum.

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.

5.5 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, measured using economic value of visitors calculations, including local visitor and day visitor spend assumptions broken down by county.

In 2018-19 North West museums had a gross visitor impact to the regional economy of **£134,225,563**, compared to **£100,709,551** in 2017-18 when more museums responded to the survey. In times when museums are having to make their case for funding more forcefully than ever, these are powerful figures of impact to point to funders and stakeholders.

The statistics on museums' contribution to the local economy in the report were calculated by SWMD using AIM's economic impact toolkit (2014), including local area visitor spend assumptions broken down by county. AIM published an updated version of the economic impact toolkit in October 2019[7] with revised spend assumptions but for this report the original version has been used to ensure consistency with benchmarking surveys in other museum development regions.

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[7] Economic Impact Toolkit 2019, AIM, https://www.aim-museums.co.uk/wp-content/uploads/2019/10/Economic-Impact-Toolkit-2019.pdf

6. Resources

Financial information has been given at either an 'individual' level for single service museums, or at 'museum service' level for multi-site services. 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 if museums charge for admission. In addition to given responses we did our own research, taken from websites, to compile a comprehensive list of museums which charge and those that don't, and how much they currently charge (prices correct February 2020)[8].

Charging models for North West museums[9]

	Charging	**Free**	**Unknown**
Cheshire	15	8	1
Cumbria	18	1	4
Greater Manchester	9	20	7
Lancashire	17	9	4
Merseyside	4	13	4
Total	63	51	20
Percentage	47%	38%	15%

[8] We have used standard adult charge, not concessions, special offers or combined tickets for multi-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/events we have counted them as free general admission

[9] Museums closed for refurbishment as of February 2020 were not included in the totals

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 **53%**.

In 2014, when we began looking at admissions charges, 44% of Accredited museums levied a charge, 48% were free and 8% were unknown.

In 2020, of those that charge a fixed fee:

	£5 or less	**More than £5**
Independent	14	19
Local authority	12	3
National Trust	1	12
English Heritage	0	2

Within these figures:

- 43% of museums charge £5 or less, 57% charge more than £5; in the 2013-14 survey the corresponding figures were swapped, at 57% and 43% respectively, so the general trend has been for admission prices, where charged, to increase
- National Trust and English Heritage properties charge significantly higher entrance fees than others; if these sites are removed from the calculation, then **54% of museums that charge have an admission fee of £5 or less**. This is down from two-thirds of charging museums in 2013-14, so where museums charge, the admission price is tending to go up
- 38 museums have put their admission charges up since 2016. In previous years National Trust and English Heritage Accredited properties have proportionally made the biggest increases, some by more than £5. Since 2016 some National Trust properties have increased admission fees by between £3 and £5, English Heritage have seen smaller price rises for both of their Accredited properties in the region
- Historically local authority and smaller independent museums have made the smallest increases, typically 25p to £1 at a time. Whilst 15 of these museums have made similar price rises since 2016, another six independents and a local authority museum have increased their admission charges between £2 and £5

When we looked at museum websites for their admission charges, we found that some were not as clear as they could be:

- On 20 museum websites we couldn't find any information about whether they charged or were free
- On many websites charging/free information was only found several clicks away from the home page
- Three museums didn't state anywhere on their website that they were free; the information appeared on their leaflet, downloadable from the website
- When we carried out these checks in 2016 only seven didn't make charging/free clear on their website

There are regional variations:

- There remains a significantly higher proportion of free museums in Greater Manchester and Merseyside, partly because this is where national museums are clustered
- Lancashire used to have a roughly 50/50 split of free and charging museums, now there are more museums which charge, partly due to the closure of a number of museums which were free
- 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 – the minimum charge in the county is £4
- In Cheshire (excluding National Trust and English Heritage properties) half of museums charge £5 or less admission fee whilst half charge more. The range of charges is wider than in 2016 when the highest fee was £7.40; the most expensive admission fees now are £9.50 and £9.75
- Local authority museums which charge are now predominantly in Lancashire

6.2 Income and expenditure

Museums were asked to provide figures for income for 2018-19 from:

- Admission charges
- Donations
- Shop and retail
- In-house or contracted out café/refreshments
- Any other earned income (e.g. events, hospitality, education, and any other income from trading activity such as property rental)
- Other contributed income (e.g. any money received through Friends/member schemes, bequests and legacies, any sponsorship, income from corporate membership schemes or other non-earned income)
- Regular public subsidy or grant for core activities (e.g. local authority, university funding, Department for Digital, Culture, Media and Sport, ACE National Portfolio Organisations, Ministry of Defence or other core funding)
- Project (revenue) grant
- Capital grant (e.g. new or refurbished buildings, galleries or equipment)

Museums were also asked to supply figures for total expenditure (including staff costs) and a separate figure for expenditure on staff costs.

Some museums that completed the rest of the survey did not provide us with full financial details and so the findings in this section should be taken as a guide to possible general trends rather than taken as definitive figures. Some museums were excluded in this data where there were obvious anomalies in their figures.

For single site museums, total income exceeded expenditure in 15 independent museums and two local authority museums. One independent museum recorded a zero balance. Six independents (five in the same county) and three local authorities reported deficits. For multi-site museums, three raised sufficient income to cover their expenditure and two recorded a loss.

Where local authority museums have reported losses, for all except one the deficit has run 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.

6.3 Income from cafés

27 of the museums that responded to the survey had an in-house café, 10 contracted out their café to an external caterer, and 22 didn't have one.

Using the definitions provided by SWMD, for those that provided figures for in-house cafes:

Size (number of museums)	Total income	Average income
Small (4)	£32,885	£8,221
Medium (12)	£807,681	£67,307
Large (3)	£18,321	£6,107
Extra large (6)	£2,551,824	£425,304

There is a big discrepancy between the average takings from a medium and large museum – the museums in the large category were all local authority run.

When the medium segment was broken down by governance type, independent museums within the category earned an average of £90,679 from their café whilst medium-sized local authority museums made an average of £13,247.

There aren't enough responses here to draw a definitive conclusion, but the data we have suggests that there could be some factors unique to local authority services that might prevent their museums from making more money from their café offer.

But there are also other factors at play which we haven't looked at e.g. the size of the café and catering facilities, location of museum, and competition from other cafés in the local area which also might have an impact.

MDNW action

Continue to deliver programme of support around ACE Goal 3, resilience, in 2020-21

6.4 Income from donations

In our 2016 survey, it was found that the income from donations had gone up over ten-fold in Cheshire from the previous survey, had remained fairly constant in Greater Manchester and Cumbria and had declined in Lancashire. Between 2016 and 2019, income from donations appears to have declined across all counties except Lancashire, which has seen a marginal increase.

In 2016 in Cheshire, museums that charged an admission fee also had a considerably higher average donation per visitor than museums that didn't charge admission. In 2018 this pattern appears to be reversed – for museums that charge the average donation per visitor is 3p, for free museums the average donation per visitor is £1.25 (excluding one museum from the calculation with an average donation per head of £18.86). In 2016 the average donation per visitor for charging museums was £1.23, for non-charging it was 16p.

In Greater Manchester in 2016 the average donation per visitor for charging museums was £7.03, in free museums 9p. In 2018 for free museums the average has gone down to 3p. From the data we have only two museums in Greater Manchester that charge for entry could be included in the analysis; the average donation per visitor for these is £1.20 and £1.45. More data is needed to make a comparison.

In Lancashire in 2016 museums that charged an admission fee also had a considerably higher average donation per visitor than museums that didn't charge admission. We have little data for 2018, but the four museums that are free average a donation of 8p per visitor, whilst the two museums that charge have an average donation per visitor of 13p and 61p respectively.

In Merseyside one free museum averages a donation per visitor of £3.70, otherwise the average donation per visitor for each of the other venues ranges from 4p to 11p for free museums, and 29p for charging museums.

The pattern of donations in Cumbria in 2016 wasn't as clear as the other counties. 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, which all charged an admission fee, the average donation was 71p. In 2018, three free museums averaged a donation of 22p per visitor. Of the other museums, which all charge, the average donation at each museum ranges from 3p to £2.20, with the average total being £1.04.

6.5 Staff and volunteers

Calculations could be made from 30 respondents only. Another three respondents didn't employ any staff, and in the other responses either the total staff expenditure or specifically expenditure on staff were not given, or there were obvious anomalies in the figures received.

In 2018-19:

- 13% spent less than 30% of annual expenditure on staffing costs
- 25% spent between 31% and 50%
- 33% spent between 51% and 70%
- 29% spent between 71% and 100%

In our 2012-14 survey, which received a similar number of responses, the percentages were also similar, with 63% of museums spending 51% or more on staffing; the figure for 2018-19 is 62%.

More striking is the split of governance types. Local authority (and former local authority) museums and university museums spend a much higher proportion of their expenditure on staffing – only two museums that responded spent less than 50%, they were two smaller museums with 33% and 38% respectively. The average was 65%.

For independent museums, the percentage of total expenditure spent on staff ranged from 11% to 67% (only three were above 50%). The average was 38%.

57 of the museums that responded have volunteers. Three museums didn't have any volunteers, six didn't answer. Collectively, the museums that responded have **2,435 active volunteers**, contributing **164,914 hours** or **100 FTE posts,** equating to volunteers contributing **£1,099,421** of financial value of their time to museums[10].

[10] Calculated by SWMD

7. Regional support

In previous surveys we have asked additional questions about the training museums had received and who had provided it. We have been unable to ask these additional questions in the standard survey which is now used by all museum development providers across England.

However, we know from our own records that staff, volunteers and trustees from **59%** of all the Accredited museums and museums officially working towards Accreditation **attended at least one workshop** run by MDNW in 2018-19. **70%** of the non-national museums that are the target for our support attended at least one workshop.

We also advertised on our blog other training opportunities offered by organisations such as:

Arts Fundraising & Philanthropy
Artswork
Collections Trust
Culture, Health and Wellbeing Alliance
Curious Minds
Family Arts Campaign
Kids in Museums
Money & Medals Network
NWFed
Tate

Feedback when asked about the support and advice received from MDNW included:

'As a small independent museum managed by volunteers, without the support of an on-site museum professional, MDNW is a crucial resource to which we can turn for advice, support, training and advocacy. Access to the training available is particularly essential in order to ensure the continuing development of the museum and its volunteers, enabling both to ensure compliance with Accreditation requirements' (small independent museum)

'MDNW have been a constant source of help and advice… Without that help and some of the subject specific seminars, the museum would not have gained Accreditation and the trustee board would be weaker and less capable of further developing the museum' (small independent museum)

‘Help and advice from MDNW has been very helpful especially in connection with Accreditation, forward planning, sustainability and development’ (small independent museum)

‘Lots of welcome support from the MDNW team including various staff training opportunities … all of which are invaluable to smaller organisations particularly as we have now been invited to submit our Accreditation return. Helped us to improve standards and a more effective use of time and resources’ (medium independent museum)

‘Immensely helpful and informative team! They have been instrumental in directing me to the right funds and opportunities to improve our museum's offer’ (medium local authority museum)

‘We have received support and advice from MDNW in documentation, natural history and digital skills over the period covered. We have already expanded our digital programme, placed more emphasis on natural history collections and begun to tackle our documentation backlog. MDNW are a powerful force for museum development and advocacy in the North West region and what they achieve with such a small team is nothing less than miraculous’ (large independent museum)

‘The succession planning workshops have proved very useful in helping us think about the skills we need for our organisation and have helped us to capture the knowledge of staff. This is helping with strategic planning for our new capital development in terms of staff and resources. We are also currently part of the family friendly and contemporary collecting projects. The recently established visitor services network is proving useful in terms of shared experiences and training opportunities for our Visitor Services Officer, who has been able to implement ideas and learning from the sessions to improve our offer to visitors. Thank you’ (large local authority museum)

MDNW action

Build museums’ suggestions for future support into the planning of our training programmes for 2020-21 and 2021-22, and application to ACE for funding post-2022

8. Summary

Audiences

- **7,504,902** people visited in 2018-19, compared to **8.3m** in 2017-18. Whilst the overall regional figure has remained fairly constant between 2012 and 2019, 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
- The total number of children visiting museums was **486,243** for 2018-19
- 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
- More data from more museums is needed to establish long term trends in visitor figures
- In 2018-19 North West museums had a gross visitor impact to the regional economy of **£134,225,563**, compared to **£100,709,551** in 2017-18 when more museums responded to the survey

Resources

- **53%** of Accredited museums in the North West are free to visit
- There is a roughly even split of museums which charge and those that are free. Excluding National Trust and English Heritage properties, **54% of museums that charge have an admission fee of less than £5**
- Museums that are free can make better use of their websites in advertising the fact
- 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
- Middle-sized independent museums appear to generate more income from in-house cafes than middle-sized local authority museums
- Investment in staff remains the biggest expenditure for museums, especially local authority (and former local authority) museums and university museums
- Volunteers remain a valuable source of support; collectively museums have **2,435 active volunteers**, contributing **164,914 hours** or **100 FTE posts,** equating to volunteers contributing **£1,099,421** of financial value of their time to museums

9. Good news stories

At the end of the survey we asked if you would like to tell us about any positive news or work your museum had been involved with in the past year. We can't feature them all, but here's a selection:

Gallery Oldham has developed a strong relationship with Tate through both the Artist Rooms project and the William Stott of Oldham exhibition

Congleton Museum and National Museums Liverpool jointly acquired a Roman coin hoard

Through their Robert Mapplethorpe exhibition **The Atkinson** in Southport worked with young LGBTQ+ audiences in the borough

Ellenroad Engine House, which officially started working towards Accreditation in 2018, was awarded the Dorothea Prize by the Association for Industrial Archaeology for rebuilding the Potclays steam engine

The British Commercial Vehicle Museum in Leyland reopened to the public in January 2019 following a £1.8m NLHF refurbishment. In the first year after reopening it has seen nearly a threefold increase in visitor numbers from the year before the refurbishment

Mersey Fire & Rescue Heritage & Education Centre in Bootle took part in MDNW's Age Friendly programme and has been recognised as an Age Confident customer service organisation

Warrington Museum of Freemasonry has borrowed items from Lady Lever Art Gallery since successfully gaining Accreditation in 2018

Cumbria's Museum of Military Life secured a grant for a major exhibition and project on Afghanistan, working with veterans

Appendix A - Museums returning completed surveys

Cheshire	
Catalyst Science Discovery Centre	Museum of Policing in Cheshire, Warrington
Congleton Museum	Nantwich Museum
Deaf Museum & Archive, Warrington	Stretton Watermill
Englesea Brook Chapel & Museum of Primitive Methodism	Warrington Museum & Art Gallery
Grosvenor Museum, Chester	Warrington Museum of Freemasonry
Lion Salt Works	Weaver Hall Museum & Workhouse
Cumbria	
Abbot Hall Art Gallery	Keswick Museum & Art Gallery
Armitt Museum & Library	Museum of Lakeland Life & Industry
Blackwell, the Arts & Crafts House	Quaker Tapestry Museum
Brantwood	Ravenglass Railway Museum
Cumbria's Museum of Military Life	Tullie House Museum & Art Gallery
Dock Museum, Barrow	Wordsworth Museum & Dove Cottage
Helena Thompson Museum	
Greater Manchester	
Astley Cheetham Art Gallery, Tameside	Museum of Transport, Manchester
Bolton Museum & Art Gallery	Ordsall Hall
Central Art Gallery, Tameside	Portland Basin Museum, Tameside
Ellenroad Engine House	Royal Northern College of Music Collection of Historic Musical Instruments
The Fusilier Museum & Learning Centre, Bury	Salford Museum & Art Gallery
Gallery Oldham	Smithills Hall, Bolton
Hall I' Th' Wood Museum, Bolton	Touchstones Rochdale

Manchester Museum Museum of the Manchester Regiment, Tameside	The Whitworth
Lancashire Astley Hall Museum & Coach House British Commercial Vehicle Museum Fleetwood Museum Harris Museum & Art Gallery Haworth Art Gallery	Ribchester Roman Museum South Ribble Museum & Exhibition Centre Towneley Hall Art Gallery & Museum, Burnley
Merseyside The Atkinson, Southport Birkenhead Priory & St Mary's Tower Border Force National Museum Garstang Museum of Archaeology International Slavery Museum Lady Lever Art Gallery Mersey Fire & Rescue Heritage & Education Centre Merseyside Maritime Museum Museum of Liverpool	Port Sunlight Museum Prescot Museum Sudley House Victoria Gallery & Museum Walker Art Gallery Williamson Art Gallery & Museum World Museum Liverpool World of Glass

Images

'In Arduis Fidelis - Faithful In Adversity' Tameside Museum Services (front cover), Salford Museum & Art Gallery (p2, top), Museum of Transport, Greater Manchester (p2, second), Dock Museum, Barrow-in-Furness (p2, third), Brantwood (p2, bottom)