

Economic Value of the Independent Museum Sector

TOOLKIT

2019



**Association of
Independent
Museums**

Helping Heritage
Organisations Prosper





Economic Impact of the Independent Museum Sector 2019

SUPPORTING JOBS LOCALLY

UK WIDE
8,900 JOBS
(6,000 FTE)



3/4 IN THE LOCAL AREA

The independent museum sector currently supports over 8,900 jobs (6,000 FTE) across the UK, over three-quarters of which are in the local area

THE VALUE OF VOLUNTEERS

34,000+ VOLUNTEERS

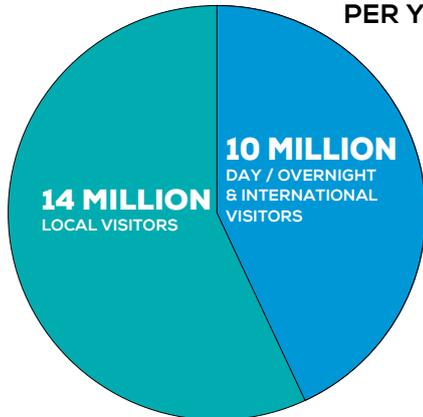


1/2 = £28
MILLION DAYS MILLION

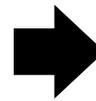
Over 34,000 regular volunteers contribute almost half a million days per year to the independent museum sector, currently estimated to be worth more than £28 million

ATTRACTING VISITS AND VISITOR SPENDING

OVER 24 MILLION VISITORS
PER YEAR



ESTIMATED TOTAL SPEND



£440
MILLION

OF WHICH

£290
MILLION
OFF-SITE SPEND

= 5,400
FTE JOBS

SIGNIFICANT ECONOMIC CONTRIBUTION LOCALLY AND NATIONALLY

GROSS DIRECT ECONOMIC CONTRIBUTION

11,400
FTE JOBS

£487 MILLION
OF EXPENDITURE

OVERALL GROSS ECONOMIC CONTRIBUTION

17,100
FTE JOBS

£730 MILLION
OF EXPENDITURE

- Considering these impacts together, the survey estimates the independent museum sector's overall gross direct economic contribution is 11,400 FTE job or £487 million of expenditure.
- Applying standard local economic multipliers suggests overall gross economic impact of the sector could be around 17,100 jobs or £730 million of expenditure.

INTRODUCTION

This toolkit (the 'AIM Economic Impact Toolkit') sets out a straightforward approach to help museums estimate the economic impact they have on their local economy. The Toolkit was originally produced in 2010, and initially **revised in 2014**. **This refreshed version for 2019 maintains the same overall approach** – whilst enhancing, improving and updating various aspects – maintaining its **'easy to use' approach** and **providing additional levels of analysis** for those that require it.

Estimating economic impacts is a specialised and technical task, which typically involves a range of complex assumptions. Whilst it does not represent a full independent economic impact assessment, this Toolkit does present an approach that can be used by museums to estimate their economic contribution and impact for the purposes of advocacy (overall, or gross, economic impact) and making a case to economic and tourism stakeholders (net additional economic impact). It is important that for each stage, the most accurate available information and data is used, which in an ideal situation would include the collection of museum-specific information (e.g. visitor surveys, and organisation-specific information on expenditure, employment and visitors).

The Toolkit is structured into two main parts with three levels in each as follows:

PART A: OVERALL GROSS ECONOMIC IMPACT OF MUSEUM

- **Level A1 – (I) Overall and (II) Off-Site Visitor Impacts:** This stage is for those museums who want to express the impact of visits to their museum in terms of the economic contribution to their local economy.
- **Level A2 – Overall Employment Impacts:** This stage is for those museums who want to express the impact of their employees (if they have them) in terms of the economic contribution to their local economy.
- **Level A3 – Overall Impacts of Spend on Goods and Services:** This stage is for those museums who want to express the impact of their spending on goods and services in terms of the economic contribution to their local economy.
- **TOTAL A – Overall Gross Impact = (Level A1(II) + Level A2 + Level A3)**

PART B: NET ADDITIONAL ECONOMIC IMPACT OF MUSEUM

- **Level B1 – Net Additional Visitor Impacts:** This stage is for those museums who want to express the impact of visits to their museum in terms of the economic contribution to their local economy.
- **Level B2 – Net Additional Employment Impacts:** This stage is for those museums who want to express the impact of their employees (if they have them) in terms of the economic contribution to their local economy.
- **Level B3 – Net Additional Impacts of Spend on Goods and Services:** This stage is for those museums who want to express the impact of their spending on goods and services in terms of the economic contribution to their local economy.
- **TOTAL B – Net Additional Impact = (Level B1 + Level B2 + Level B3)**

Depending on the needs of your museum, different levels of the toolkit will be more relevant than others. If you are interested in overall advocacy messages – Levels A1(I), A1(II), A2, A3 can be used individually and collectively as key messages about the overall economic contribution of the museum to the local economy.

If you are using the toolkit to help inform and influence funding and investment decisions and want to assess and evidence the net additional impact to a potential funder – then the various aspects of Part B will be more relevant.

The DC Research and Durnin Research team are happy to discuss the toolkit with AIM member museums and provide summary help and guidance as appropriate. However, DC Research Ltd and Durnin Research Ltd accepts neither liability nor responsibility for its use, or the implications of its use, by AIM member (or any other) museums. It should also be noted that the data and assumptions set out in the various Tables will change over time as new data and impact methodologies become available, and as such, data and assumptions included within this toolkit will need to be refreshed on a regular basis to ensure it is kept up-to-date.

Collecting data

The robustness of the toolkit, and of its use, depends on the museum specific information and data that is used. In all instances, information and data that is accurate and relates specifically to the individual museum using the toolkit is the best approach to adopt. In instances where museum specific data is not readily available, an alternative approach is for museums to make judgements based on their experience. However, it should be borne in mind that such estimates are secondary to museum-specific data, and the generation of specific information and data should always be considered as the preferred approach (particularly on the number and composition of visitors).

For each level of the Toolkit, it is important that museums set out where information and data has come from and, where judgement has been used in the absence of such information and data, a brief explanation of the supporting rationale.

Where reference is made to museum size, AIM's standard approach has been used:

- Small Museum - 20,000 visitors and below
- Medium Museum - between 20,000 and 50,000 visitors
- Large Museum - between 50,000 and 100,000 visitors
- Largest Museum - over 100,000 visitors.

Level A1: (I) Overall and (II) Off-Site Visitor Impacts

This stage is for those museums who want to express the overall gross impact of visits to their museum in terms of economic contribution. The calculation of economic contribution of visitors to a museum is relatively straightforward, through following the steps below:

1. Establish the total number of visitors to the museum for the last complete year and, importantly in terms of impact, separate out the number of adult and number of child visitors. If you do not know, or cannot estimate, the adult/child split a useful proxy measure is to assume that 75% of visitors are adult and apply this ratio.
2. Establish the proportion (and subsequently the number) of adult visitors that are 'local' (i.e. from the local community of the museum), 'day visitors', and 'overnight visitors' (i.e. those who have stayed in the area overnight). In doing this, the following might be helpful:
 - a. Estimates of the proportion of local, day, and overnight visitors can be derived from museum-specific visitor surveys.
 - b. Alternatively, a split between local, day and overnight visitors can be estimated based on analysis of postcodes from museum-specific Gift Aid data (where travel time to the museum of more than three hours can be assumed to equate to an overnight stay, calculated by analysing a sample of postcode data).
3. Select the area in which the museum is located from Table 1.
4. To calculate the gross impacts of visitors to the museum: multiply the number of local visitors by the relevant information in Table 1 ('spend by local visitor column'); the number of day visitors by 'spend per day visit'; and the number of overnight visitors by 'spend per night'. Summing these three values up will provide the overall gross economic impact of visitors to the museum.

Level A1(I) – Overall Visitor Impacts Example:

Museum X (located in Bristol) had 13,500 visitors in the last financial year, of which 10,000 were adults. The museum estimates that 40% are local visitors, 40% are day trippers and 20% overnight visitors.

- Local visitors: $4,000 \times £22.12 = £88,500$
- Day trippers: $4,000 \times £44.25 = £177,000$
- Overnight visitors: $2,000 \times £76.45 = £152,900$

Total gross visitor impacts of £418,400 in the local economy last year.

This information and analysis can be used in advocacy messages – e.g. **Museum X attracts a total of 13,500 visitors per year, who spend more than £418,000 in the local economy.**

Off-Site Visitor Impacts

5. To assess the scale of impact that occurs off-site (i.e. outside/beyond the museum) it is necessary to adjust for the total value of visitor spend that takes place within the museum (i.e. on admissions, retail spend, and catering spend) and subtract this from the overall total.

6. The value of on-site visitor spend is specific to each individual museum – and the best option is to use museum-specific information such as average spend per visitor in the shop and/or café (where relevant) alongside average admissions income per visitor. Simply add these on-site spend values together and multiply the total by the number of visitors per annum. Subtract this total from the impact from Level 1A and this will provide an off-site visitor impact.
7. If you do not know these average-spend figures, as a rough guide deduct the overall annual income for the museum (from admissions, and any retail and catering) from the total from Level 1A. Alternatively, a useful proxy measure is the average on-site spend per visitor results from the survey of museums carried out to underpin this Toolkit – £3.00 for Small/Medium Museums and £10.65 for Large/Largest Museums.

Level A1(II) – Off-Site Visitor Impacts Examples:

Museum X had 13,500 visitors in the last financial year, of which 10,000 were adults. The museum estimates that 40% are local visitors, 40% are day trippers and 20% overnight visitors. On average, on-site spend per visitor at the museum is £5.00.

- Local visitors: $4,000 \times (£22.125 - £5.00) = £68,500$
- Day trippers: $4,000 \times (£44.25 - £5.00) = £157,000$
- Overnight visitors: $2,000 \times (£76.45 - £5.00) = £142,900$

Total gross off-site visitor impacts of £368,400 in the local economy last year.

This information and analysis can be used in advocacy messages – e.g. **Museum X attracts a total of 13,500 visitors per year – 60% of which are visitors to the area. Museum visitors spend a total of £368,400 in the local economy above and beyond what they spend directly in the museum.**

Level A2: Overall Employment Impacts

This stage is for those museums that employ paid staff and want to express the direct (and potentially wider economic impacts) of their employees on the local economy.

The estimation of the direct economic contribution of museum employees is set out through following the steps below:

1. Identify the total number of employees for the last complete year (if this has changed during the year, take an average from across the year).
2. Establish the number of full time equivalent (FTE) employees for the last complete year. If you do not know the FTE, a simple approach is to assume that each full-time employee is 1 FTE and that 2 part-time employees equals 1 FTE.
3. Determine the proportion of FTE employees that **do not** live locally (i.e. in the local area where you are assessing the impact – e.g. in the local authority area where the museum is located) and subtract this from the total.
4. Multiply the total number of FTE by £32,600 to get an estimate of overall turnover related to these jobs¹.

Level A2 – Overall Employment Impacts Example:

Museum X employs a total of 20 people, 12 of whom work full-time and 8 of whom work part-time. All of the part-time employees live locally and 10 of the full-time employees live locally.

The **total number of FTE employees is 16** (i.e. $(12 \times 1) + (8 \times 0.5)$), and the **total number of FTE employees that live locally is 14**.

The **total turnover value that can be attributed to this scale of employment is** $(14 \times £32,600) = \mathbf{£456,400}$.

This information and analysis can be used in advocacy messages – e.g. **Museum X employs a total of 20 employees, and directly supports a total of 14 FTE jobs in the local area.**

Level A3: Overall Impacts of Spend on Goods and Services:

This stage is for museums who want to express the impact of their spending on goods and services in terms of economic value to their local economy.

The estimation of direct economic contribution of museum spend on goods and services in the local economy is set out through following the steps below:

1. Establish the total amount spent on goods and services (excluding any spend related to employment) for the last complete year.
2. Determine the proportion of spend on goods and service with suppliers that **are not** based locally (i.e. in the local area where you are assessing the impact – e.g. in the local authority area where the museum is located) and subtract this from the total.

Level A3 – Overall Impacts of Spend on Goods and Services Example:

Museum X spend a total of £250,000 on good and services each year. One third of this expenditure is spent outside of the local area.

Total local spend = £250,000 less the spend that leaks out the area ($£250,000/3 = £83,333$) – which equals **£166,667**.

PART A - AGGREGATING OVERALL IMPACTS

To calculate the overall, aggregate gross economic impact of the museum you can add together the results from Level A1(II), Level A2 and Level A3.

PART A – Overall Impacts of Spend on Goods and Services Example:

The overall, aggregate gross economic impact of Museum X is:

Level A1(II)	£368,400 of off-site visitor expenditure
+ Level A2	£456,400 of employment related turnover
+ Level A3	£166,667 of spend on good and services
= TOTAL	£991,467

Part B of the Toolkit is for museums that want to estimate the net additional impact that they have on their local economy. This involves making assumptions about the scale of additional economic activity that is due to the museum and would not happen in the local area without the museum.

Level B1: Net Additional Off-Site Visitor Impacts

This stage is for those museums who want to express the net additional off-site visitor impacts of the museum in terms of economic contribution. The calculation of economic contribution of visitors to a museum is relatively straightforward, through following the steps below:

1. Take the information used to calculate Level A1(II) above - in terms of number of adult visitors split by type and the off-site spend of each type of visitor.
2. Use the average dwell-time of visitors to assess how much of the visit can be attributed to the museum. In the absence of any dwell time data, assume that one-half day can be attributed to each visitor – unless the museum has specific quantitative, evidence otherwise. If average dwell-time is more than 2.5 hours, then a full day can be attributed to the museum.
3. Using Table 2, decide on the most appropriate 'displacement ratio' assumption relevant to the museum:
 - a. Displacement for museums that are a major or key attraction, drawing visitors to the area should be 25% (i.e. a ratio of 0.25).
 - b. Displacement for museums that are a moderate attraction, drawing visitors to the area should be 50% (i.e. a ratio of 0.5).
 - c. Displacement for museums that primarily serve a local audience should be 75% (i.e. a ratio of 0.75).
4. In order to calculate the net additional visitor impacts of the museum, the value of visitor spend needs to be applied to a formula that takes account of attribution, deadweight, displacement and multiplier factors.
5. This can be expressed as follows: Net wider economic impact of visitor spend (i.e. net Direct, Indirect and Induced Spend) = total visitor spend of each type x (attribution) x (1-deadweight) x (1-leakage) x (1-displacement) x (multiplier). For each ratio this needs to be expressed in the calculation as a number (e.g. 25% as 0.25).
6. Summing these three values up will provide the net additional economic impact of visitors to the museum.

Level B1 – Net Additional Visitor Impacts Example:

The New Museum (located in Durham) had 50,000 visitors in the last financial year, of which 40,000 were adults. The museum estimates that 70% are local visitors, 20% are day trippers and 10% overnight visitors. On average, on-site spend per visitor at the museum is £5.00.

- Local visitors: $28,000 \times (£11.84 - £5.00) = £191,520$
- Day trippers: $8,000 \times (£23.68 - £5.00) = £149,440$
- Overnight visitors: $4,000 \times (£63.83 - £5.00) = £235,320$

Total gross visitor impacts of £576,280 in the local economy last year.

The average dwell-time for visitors is not known, and the museum is a key attraction in the local area.

Net additional visitor impacts = $(576,280 \times 0.5 \text{ day}) \times (1-0.25) \times 1.25 = \text{£}270,131$

Total net additional visitor impacts of £270,131 in the local economy.

Level B2: Net Additional Employment Impacts

This stage is for those museums that employ paid staff and want to express the wider economic impacts (referred to as the indirect and induced impacts) of their employees on the local economy. The estimation of the economic value of museum employees is driven by a number of assumptions and is set out through following the steps below:

1. Take the number of full time equivalent (FTE) employees that reside in the local economy for the last complete year (i.e. the result from Step 3 from Level A2).
2. Confirm the proportion of FTE employees that **do not** live locally (say in the local authority area where the museum is located).
 - a. If for example this proportion is 25%, this gives the museum an employment 'leakage' ratio of 0.25.
 - b. It is preferable that leakage is calculated from museum specific information. However, if this is not possible, then museums can use the relevant employment leakage ratio from Table 2.
3. Using Table 2, decide on the most appropriate 'displacement ratio' assumption relevant to the museum.
4. In order to calculate the wider impacts of employment at the museum, the total number of FTE staff needs to be applied to a formula that takes account of deadweight, leakage, displacement and multiplier factors.
5. This can be expressed as follows: Net wider economic impacts of employment (i.e. Indirect and Induced Employment) = number of FTE staff x (1-deadweight) x (1-leakage) x (1-displacement) x (multiplier). For each ratio this needs to be expressed in the calculation as a number (e.g. 25% as 0.25).

Level B2 Net Additional Employment Impacts Examples:

The New Museum is a large museum that employs a total of 40 local staff (26 full time and 14 part time) which equates to 33 FTE jobs.

Net additional employment impacts = $33 \times (1-0.25) \times (1-0.10) \times (1-0.375) \times 1.25 = 17.4$ FTE jobs

Total direct, indirect and induced employment value of 17.4 jobs.

This can be valued at $17.4 \times \text{£}32,600 = \text{£}567,240$.

Level B3: Impacts of Spend on Goods and Services:

This stage is for museums who want to express the impact of their spending on goods and services in terms of economic value to their local and regional economies. The estimation of economic value of museum spend on goods and services is driven by a number of assumptions and is set out through following the steps below:

1. Take the total amount spent on goods and services (excluding spend on employment) in the local economy for the last complete year – i.e. the result from Level A3.
2. Determine the proportion of spend on goods and service with suppliers that **are not** based locally (say in the local authority area where the museum is located).
 - a. If for example this proportion is 50%, this gives the museum a spend 'leakage' ratio of 0.5.
 - b. It is preferable that leakage is calculated from museum specific information on supplier location. However if this is not possible, then museums can use the relevant spend leakage ratio from Table 2.
3. Using Table 2, decide on the most appropriate 'displacement ratio' assumption relevant to the museum.
4. In order to calculate the wider economic impacts of the museums spend on goods and services, the total value of spend on goods and services needs to be applied to a formula that takes account of deadweight, leakage, displacement and multiplier factors.
5. This can be expressed as follows: Net wider economic impact of spend on goods and services (i.e. Indirect and Induced Spend) = spend on goods and services x (1-deadweight) x (1-leakage) x (1-displacement) x (multiplier). For each ratio this needs to be expressed in the calculation as a number (e.g. 25% as 0.25).

Level B3: Spending on Goods and Services Examples:

The New Museum is a large museum that spend a total of £500,000 in the local economy in the last financial year.

Indirect & induced spend = £500,000 x (1-0.25) x (1-0.6) x (1-0.25) x 1.25 = £140,625

Total direct, indirect and induced spend of £140,625.

PART B – AGGREGATING NET ADDITIONAL IMPACTS

To calculate the net additional economic impacts of the museum you can add together the results from Level B1, Level B2 and Level B3.

PART B EXAMPLE: the net additional economic impact of Museum X is:

Level B1	£270,131 of net additional off-site visitor expenditure
+ Level B2	£567,240 of net additional employment related turnover
+ Level B3	£140,625 of net additional spend on good and services
= TOTAL	£977,996

ASSUMPTIONS

TABLE 1: VISITOR SPEND METRICS

ENGLAND	Local	Day	Overnight
Adur	£ 2.58	£ 5.16	£62.22
Allerdale	£ 17.49	£ 34.97	£66.24
Amber Valley	£ 6.79	£ 13.58	£42.24
Arun	£ 13.13	£ 26.26	£64.98
Ashfield	£ 3.66	£ 7.33	£58.54
Ashford	£ 16.01	£ 32.02	£56.80
Aylesbury Vale	£ 23.82	£ 47.64	£51.45
Babergh	£ 10.84	£ 21.67	£56.74
Barking And Dagenham	£ 14.53	£ 29.06	£68.48
Barnet	£ 10.48	£ 20.96	£57.55
Barnsley	£ 6.33	£ 12.66	£42.37
Barrow-In-Furness	£ 23.31	£ 46.62	£150.30
Basildon	£ 8.63	£ 17.26	£41.71
Basingstoke And Deane	£ 18.93	£ 37.86	£56.24
Bassetlaw	£ 8.44	£ 16.89	£61.81
Bath And North East Somerset	£ 18.20	£ 36.40	£104.99
Bedford	£ 14.70	£ 29.40	£40.43
Bexley	£ 16.16	£ 32.32	£37.08
Birmingham	£ 24.37	£ 48.74	£82.53
Blaby	£ 8.99	£ 17.97	£30.47
Blackburn With Darwen	£ 22.34	£ 44.68	£82.41
Blackpool	£ 25.01	£ 50.02	£86.83
Bolsover	£ 9.64	£ 19.28	£57.69
Bolton	£ 10.01	£ 20.02	£72.06
Boston	£ 16.67	£ 33.34	£48.82
Bournemouth	£ 15.56	£ 31.12	£68.87
Bracknell Forest	£ 16.04	£ 32.07	£42.71
Bradford	£ 13.16	£ 26.32	£63.08
Braintree	£ 15.51	£ 31.02	£41.27
Breckland	£ 10.60	£ 21.20	£63.57
Brent	£ 15.42	£ 30.84	£68.13
Brentwood	£ 5.26	£ 10.51	£57.31
Brighton And Hove	£ 19.20	£ 38.40	£86.71
Bristol	£ 22.12	£ 44.25	£76.45
Broadland	£ 6.09	£ 12.18	£56.31
Bromley	£ 16.19	£ 32.39	£32.36
Bromsgrove	£ 10.82	£ 21.65	£42.42
Broxbourne	£ 20.05	£ 40.09	£58.02
Broxtowe	£ 7.58	£ 15.17	£34.95
Burnley	£ 8.87	£ 17.75	£51.55
Bury	£ 33.30	£ 66.60	£48.19
Calderdale	£ 21.62	£ 43.24	£50.31
Cambridge	£ 20.76	£ 41.53	£81.23
Camden	£ 21.10	£ 42.19	£128.46
Cannock Chase	£ 4.15	£ 8.29	£53.62
Canterbury	£ 14.53	£ 29.06	£72.75
Carlisle	£ 25.58	£ 51.16	£70.63
Castle Point	£ 10.43	£ 20.85	£39.22
Central Bedfordshire	£ 7.69	£ 15.37	£64.82
Charnwood	£ 19.47	£ 38.94	£41.63
Chelmsford	£ 17.19	£ 34.38	£31.23

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ENGLAND	Local	Day	Overnight
Cheltenham	£ 24.20	£ 48.40	£70.87
Cherwell	£ 33.63	£ 67.26	£76.77
Cheshire East	£ 17.28	£ 34.57	£59.92
Cheshire West And Chester	£ 22.46	£ 44.92	£88.23
Chesterfield	£ 13.29	£ 26.58	£41.27
Chichester	£ 16.69	£ 33.37	£51.38
Chiltern	£ 15.31	£ 30.63	£46.66
Chorley	£ 7.23	£ 14.46	£47.62
Christchurch	£ 7.05	£ 14.09	£68.43
City Of London	£ 28.64	£ 57.28	£139.80
City Of Westminster	£ 25.81	£ 51.63	£184.39
Colchester	£ 9.83	£ 19.67	£55.20
Copeland	£ 6.59	£ 13.18	£54.70
Corby	£ 16.99	£ 33.97	£50.16
Cornwall	£ 12.29	£ 24.59	£59.24
Cotswold	£ 12.85	£ 25.70	£82.68
County Durham	£ 11.84	£ 23.68	£63.83
Coventry	£ 11.51	£ 23.03	£66.16
Craven	£ 13.06	£ 26.13	£52.96
Crawley	£ 23.89	£ 47.77	£79.14
Croydon	£ 16.81	£ 33.61	£71.46
Dacorum	£ 8.86	£ 17.71	£64.92
Darlington	£ 13.93	£ 27.86	£80.50
Dartford	£ 17.71	£ 35.41	£54.93
Daventry	£ 8.50	£ 17.00	£78.65
Derby	£ 15.44	£ 30.88	£56.15
Derbyshire Dales	£ 10.88	£ 21.76	£63.62
Doncaster	£ 16.38	£ 32.77	£56.48
Dover	£ 22.85	£ 45.69	£57.25
Dudley	£ 15.06	£ 30.13	£35.48
Ealing	£ 12.30	£ 24.61	£58.50
East Cambridgeshire	£ 7.81	£ 15.62	£40.94
East Devon	£ 14.73	£ 29.47	£56.56
East Dorset	£ 5.77	£ 11.55	£35.35
East Hampshire	£ 9.46	£ 18.93	£72.59
East Hertfordshire	£ 9.65	£ 19.29	£48.39
East Lindsey	£ 14.64	£ 29.27	£43.05
East Northamptonshire	£ 8.19	£ 16.37	£60.26
East Riding Of Yorkshire	£ 11.43	£ 22.86	£38.77
East Staffordshire	£ 11.44	£ 22.88	£51.11
Eastbourne	£ 14.64	£ 29.28	£67.01
Eastleigh	£ 23.10	£ 46.21	£38.58
Eden	£ 18.09	£ 36.18	£66.51
Elmbridge	£ 19.08	£ 38.16	£73.51
Enfield	£ 14.05	£ 28.10	£51.64
Epping Forest	£ 13.43	£ 26.86	£36.40
Epsom And Ewell	£ 11.79	£ 23.58	£54.02
Erewash	£ 7.88	£ 15.76	£35.57
Exeter	£ 14.87	£ 29.75	£63.08
Fareham	£ 12.09	£ 24.19	£62.75
Fenland	£ 10.30	£ 20.61	£38.14
Forest Heath	£ 16.36	£ 32.72	£82.45
Forest Of Dean	£ 8.69	£ 17.39	£62.28
Fylde	£ 14.12	£ 28.23	£70.76
Gateshead	£ 18.16	£ 36.31	£44.44

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ENGLAND	Local	Day	Overnight
Gedling	£ 4.01	£ 8.03	£85.33
Gloucester	£ 28.34	£ 56.69	£65.75
Gosport	£ 16.76	£ 33.52	£30.73
Gravesham	£ 6.49	£ 12.99	£34.62
Great Yarmouth	£ 11.00	£ 21.99	£55.56
Greenwich	£ 16.37	£ 32.74	£83.69
Guildford	£ 12.08	£ 24.15	£53.38
Hackney	£ 15.58	£ 31.15	£88.17
Halton	£ 15.08	£ 30.16	£78.62
Hambleton	£ 9.51	£ 19.01	£51.77
Hammersmith and Fulham	£ 20.95	£ 41.91	£85.84
Harborough	£ 10.75	£ 21.50	£50.56
Haringey	£ 16.00	£ 31.99	£36.60
Harlow	£ 11.58	£ 23.17	£35.79
Harrogate	£ 13.84	£ 27.68	£75.46
Harrow	£ 17.11	£ 34.22	£54.23
Hart	£ 9.46	£ 18.91	£70.32
Hartlepool	£ 13.69	£ 27.38	£87.59
Hastings	£ 14.51	£ 29.03	£50.52
Havant	£ 8.53	£ 17.07	£42.03
Havering	£ 10.03	£ 20.06	£45.83
Herefordshire	£ 12.79	£ 25.58	£54.67
Hertsmere	£ 3.67	£ 7.34	£60.00
High Peak	£ 9.68	£ 19.37	£57.88
Hillingdon	£ 20.28	£ 40.55	£107.83
Hinckley And Bosworth	£ 15.47	£ 30.93	£42.37
Horsham	£ 10.20	£ 20.41	£47.37
Hounslow	£ 20.69	£ 41.37	£103.90
Huntingdonshire	£ 14.12	£ 28.23	£44.25
Hyndburn	£ 4.68	£ 9.35	£26.42
Ipswich	£ 12.51	£ 25.02	£68.47
Isle Of Wight	£ 13.58	£ 27.16	£62.18
Isles Of Scilly	£ 11.38	£ 22.77	£80.51
Islington	£ 16.26	£ 32.51	£91.91
Kensington and Chelsea	£ 25.15	£ 50.29	£174.45
Kettering	£ 12.83	£ 25.67	£66.20
King'S Lynn And West Norfolk	£ 9.03	£ 18.07	£51.39
Kingston Upon Hull	£ 17.40	£ 34.80	£39.40
Kingston Upon Thames	£ 16.23	£ 32.45	£69.11
Kirklees	£ 9.53	£ 19.06	£48.97
Knowsley	£ 11.72	£ 23.45	£30.30
Lambeth	£ 18.01	£ 36.01	£72.02
Lancaster	£ 17.23	£ 34.46	£50.71
Leeds	£ 18.75	£ 37.50	£79.66
Leicester	£ 24.55	£ 49.10	£56.96
Lewes	£ 8.59	£ 17.18	£34.36
Lewisham	£ 10.02	£ 20.03	£56.72
Lichfield	£ 12.05	£ 24.10	£44.18
Lincoln	£ 23.01	£ 46.01	£51.90
Liverpool	£ 19.25	£ 38.51	£90.36
Luton	£ 11.01	£ 22.02	£64.79
Maidstone	£ 17.85	£ 35.70	£67.36
Maldon	£ 8.52	£ 17.04	£56.25
Malvern Hills	£ 28.89	£ 57.79	£64.73
Manchester	£ 24.54	£ 49.08	£97.50

Economic Value of the Independent Museum Sector: Toolkit (2019 Edition)

ENGLAND	Local	Day	Overnight
Mansfield	£ 12.11	£ 24.21	£26.88
Medway	£ 14.39	£ 28.78	£41.40
Melton	£ 14.83	£ 29.67	£65.96
Mendip	£ 13.83	£ 27.66	£74.81
Merton	£ 20.30	£ 40.60	£63.38
Mid Devon	£ 10.38	£ 20.77	£50.90
Mid Suffolk	£ 6.17	£ 12.34	£44.15
Mid Sussex	£ 10.51	£ 21.01	£69.40
Middlesbrough	£ 22.41	£ 44.82	£35.86
Milton Keynes	£ 20.88	£ 41.77	£87.32
Mole Valley	£ 11.76	£ 23.52	£63.11
New Forest	£ 14.21	£ 28.42	£60.86
Newark And Sherwood	£ 10.81	£ 21.62	£60.08
Newcastle Upon Tyne	£ 25.98	£ 51.96	£87.96
Newcastle-Under-Lyme	£ 8.06	£ 16.11	£58.95
Newham	£ 19.24	£ 38.49	£93.92
North Devon	£ 15.43	£ 30.87	£59.18
North Dorset	£ 8.20	£ 16.39	£21.41
North East Derbyshire	£ 7.61	£ 15.22	£59.83
North East Lincolnshire	£ 15.87	£ 31.73	£41.37
North Hertfordshire	£ 7.54	£ 15.08	£48.10
North Kesteven	£ 24.23	£ 48.47	£54.10
North Lincolnshire	£ 10.89	£ 21.78	£48.18
North Norfolk	£ 11.55	£ 23.11	£53.59
North Somerset	£ 12.97	£ 25.94	£61.72
North Tyneside	£ 7.96	£ 15.93	£54.76
North Warwickshire	£ 10.53	£ 21.06	£39.74
North West Leicestershire	£ 14.04	£ 28.09	£56.34
Northampton	£ 20.21	£ 40.41	£62.97
Northumberland	£ 10.12	£ 20.25	£58.61
Norwich	£ 17.06	£ 34.13	£56.69
Nottingham	£ 20.79	£ 41.57	£71.17
Nuneaton And Bedworth	£ 16.48	£ 32.95	£62.27
Oadby And Wigston	£ 3.98	£ 7.96	£33.33
Oldham	£ 11.68	£ 23.37	£79.87
Oxford	£ 23.50	£ 47.00	£75.37
Pendle	£ 19.39	£ 38.78	£32.70
Peterborough	£ 15.75	£ 31.51	£48.35
Plymouth	£ 28.05	£ 56.10	£70.33
Poole	£ 25.35	£ 50.70	£48.14
Portsmouth	£ 22.47	£ 44.95	£64.32
Preston	£ 11.46	£ 22.91	£69.24
Purbeck	£ 8.08	£ 16.16	£60.26
Reading	£ 19.16	£ 38.31	£75.11
Redbridge	£ 24.74	£ 49.47	£60.03
Redcar And Cleveland	£ 5.44	£ 10.88	£47.26
Redditch	£ 15.18	£ 30.36	£60.17
Reigate And Banstead	£ 8.09	£ 16.18	£30.44
Ribble Valley	£ 19.54	£ 39.08	£55.46
Richmond Upon Thames	£ 22.32	£ 44.65	£75.22
Richmondshire	£ 8.39	£ 16.78	£63.94
Rochdale	£ 13.02	£ 26.04	£43.90
Rochford	£ 15.89	£ 31.78	£20.30
Rossendale	£ 12.84	£ 25.67	£46.10
Rother	£ 9.28	£ 18.56	£51.47

Economic Value of the Independent Museum Sector: Toolkit (2019 Edition)

ENGLAND	Local	Day	Overnight
Rotherham	£ 10.21	£ 20.41	£62.89
Rugby	£ 12.86	£ 25.72	£54.51
Runnymede	£ 30.46	£ 60.92	£37.61
Rushcliffe	£ 6.80	£ 13.59	£39.22
Rushmoor	£ 13.14	£ 26.27	£63.20
Rutland	£ 11.74	£ 23.49	£56.53
Ryedale	£ 13.05	£ 26.11	£51.63
Salford	£ 9.30	£ 18.60	£83.73
Sandwell	£ 8.89	£ 17.78	£31.25
Scarborough	£ 16.71	£ 33.43	£65.04
Sedgemoor	£ 15.50	£ 31.00	£49.26
Sefton	£ 14.57	£ 29.13	£55.84
Selby	£ 14.69	£ 29.38	£39.62
Sevenoaks	£ 10.75	£ 21.51	£58.71
Sheffield	£ 21.47	£ 42.94	£66.51
Shepway	£ 13.01	£ 26.02	£52.23
Shropshire	£ 12.22	£ 24.45	£60.01
Slough	£ 12.73	£ 25.46	£58.06
Solihull	£ 29.78	£ 59.55	£95.79
South Bucks	£ 13.43	£ 26.87	£63.34
South Cambridgeshire	£ 14.12	£ 28.23	£53.15
South Derbyshire	£ 18.75	£ 37.49	£71.67
South Gloucestershire	£ 8.83	£ 17.66	£55.39
South Hams	£ 10.97	£ 21.95	£59.54
South Holland	£ 17.14	£ 34.28	£61.78
South Kesteven	£ 14.42	£ 28.83	£54.13
South Lakeland	£ 15.10	£ 30.19	£68.81
South Norfolk	£ 11.73	£ 23.47	£39.47
South Northamptonshire	£ 12.67	£ 25.33	£58.73
South Oxfordshire	£ 20.42	£ 40.84	£42.56
South Ribble	£ 5.01	£ 10.02	£51.55
South Somerset	£ 20.74	£ 41.48	£58.10
South Staffordshire	£ 8.34	£ 16.69	£81.25
South Tyneside	£ 7.91	£ 15.83	£33.71
Southampton	£ 28.69	£ 57.38	£53.14
Southend-On-Sea	£ 11.96	£ 23.93	£52.88
Southwark	£ 16.13	£ 32.26	£102.97
Spelthorne	£ 12.60	£ 25.20	£58.59
St Albans	£ 8.97	£ 17.95	£53.49
St Edmundsbury	£ 13.97	£ 27.94	£50.51
St. Helens	£ 11.46	£ 22.91	£50.66
Stafford	£ 22.90	£ 45.80	£47.68
Staffordshire Moorlands	£ 6.52	£ 13.05	£85.47
Stevenage	£ 11.64	£ 23.28	£75.03
Stockport	£ 10.73	£ 21.47	£53.59
Stockton-On-Tees	£ 13.72	£ 27.45	£31.10
Stoke-On-Trent	£ 18.66	£ 37.31	£55.39
Stratford-On-Avon	£ 15.29	£ 30.58	£87.24
Stroud	£ 17.80	£ 35.59	£56.13
Suffolk Coastal	£ 8.40	£ 16.79	£66.46
Sunderland	£ 10.45	£ 20.91	£63.54
Surrey Heath	£ 10.43	£ 20.86	£44.37
Sutton	£ 14.69	£ 29.38	£41.71
Swale	£ 9.81	£ 19.63	£46.98
Swindon	£ 17.81	£ 35.61	£58.73

Economic Value of the Independent Museum Sector: Toolkit (2019 Edition)

ENGLAND	Local	Day	Overnight
Tameside	£ 10.24	£ 20.49	£90.91
Tamworth	£ 33.71	£ 67.41	£51.28
Tandridge	£ 11.98	£ 23.95	£49.72
Taunton Deane	£ 8.40	£ 16.80	£64.67
Teignbridge	£ 7.33	£ 14.66	£57.19
Telford And Wrekin	£ 9.01	£ 18.02	£54.71
Tendring	£ 13.25	£ 26.51	£39.38
Test Valley	£ 18.20	£ 36.41	£54.09
Tewkesbury	£ 6.27	£ 12.54	£64.14
Thanet	£ 17.03	£ 34.06	£54.60
Three Rivers	£ 7.81	£ 15.62	£54.73
Thurrock	£ 20.47	£ 40.94	£25.91
Tonbridge And Malling	£ 17.56	£ 35.12	£39.76
Torbay	£ 9.84	£ 19.67	£71.14
Torridge	£ 14.94	£ 29.89	£55.26
Tower Hamlets	£ 16.62	£ 33.25	£69.79
Trafford	£ 8.90	£ 17.80	£37.41
Tunbridge Wells	£ 15.21	£ 30.41	£55.38
Uttlesford	£ 5.72	£ 11.44	£55.39
Vale Of White Horse	£ 22.73	£ 45.45	£47.57
Wakefield	£ 10.80	£ 21.61	£57.31
Walsall	£ 9.69	£ 19.39	£35.71
Waltham Forest	£ 11.22	£ 22.44	£44.64
Wandsworth	£ 26.97	£ 53.95	£109.90
Warrington	£ 15.82	£ 31.65	£78.07
Warwick	£ 15.06	£ 30.13	£76.55
Watford	£ 15.27	£ 30.55	£71.87
Waveney	£ 7.88	£ 15.76	£65.61
Waverley	£ 6.76	£ 13.52	£40.96
Wealden	£ 8.79	£ 17.57	£49.94
Wellingborough	£ 8.23	£ 16.46	£45.33
Welwyn Hatfield	£ 8.11	£ 16.22	£44.97
West Berkshire	£ 15.53	£ 31.06	£67.54
West Devon	£ 16.49	£ 32.98	£51.52
West Dorset	£ 8.37	£ 16.75	£54.15
West Lancashire	£ 13.45	£ 26.90	£42.25
West Lindsey	£ 7.35	£ 14.70	£34.44
West Oxfordshire	£ 9.22	£ 18.44	£75.53
West Somerset	£ 18.68	£ 37.36	£60.00
Weymouth And Portland	£ 23.47	£ 46.94	£51.04
Wigan	£ 8.30	£ 16.59	£54.02
Wiltshire	£ 15.18	£ 30.36	£57.61
Winchester	£ 10.32	£ 20.64	£72.61
Windsor And Maidenhead	£ 13.19	£ 26.38	£83.05
Wirral	£ 10.40	£ 20.79	£29.21
Woking	£ 10.16	£ 20.32	£54.42
Wokingham	£ 10.50	£ 21.00	£35.17
Wolverhampton	£ 23.46	£ 46.92	£75.55
Worcester	£ 12.26	£ 24.52	£62.97
Worthing	£ 8.11	£ 16.22	£35.13
Wychavon	£ 10.60	£ 21.20	£55.19
Wycombe	£ 11.70	£ 23.39	£63.56
Wyre	£ 12.43	£ 24.85	£57.80
Wyre Forest	£ 10.69	£ 21.37	£47.39
York	£ 23.45	£ 46.90	£90.76

SCOTLAND	Local	Day	Overnight
Aberdeen City	£20.99	£41.98	£98.10
Aberdeenshire	£15.36	£30.73	£61.98
Angus	£8.58	£17.16	£56.28
Argyll And Bute	£10.03	£20.07	£69.80
Clackmannanshire	£13.30	£26.60	£35.61
Dumfries And Galloway	£21.19	£42.38	£55.08
Dundee City	£17.14	£34.28	£62.79
East Ayrshire	£14.38	£28.76	£68.83
East Dunbartonshire	£7.03	£14.06	no data
East Lothian	£7.66	£15.33	£41.27
East Renfrewshire	£8.23	£16.46	£100.00
Edinburgh, City Of	£22.41	£44.82	£122.81
Eilean Siar	£21.28	£42.57	£50.51
Falkirk	£10.89	£21.78	£49.16
Fife	£14.03	£28.06	£53.57
Glasgow City	£24.77	£49.54	£105.74
Highland	£17.44	£34.89	£75.01
Inverclyde	£8.58	£17.15	£60.89
Midlothian	£10.00	£19.99	£47.62
Moray	£10.97	£21.93	£65.12
North Ayrshire	£12.79	£25.57	£67.56
North Lanarkshire	£15.01	£30.03	£62.67
Orkney Islands	£18.85	£37.69	£98.99
Perth And Kinross	£17.07	£34.14	£69.15
Renfrewshire	£11.46	£22.92	£56.41
Scottish Borders	£12.91	£25.82	£65.70
Shetland Islands	£13.74	£27.48	£48.55
South Ayrshire	£19.08	£38.16	£78.45
South Lanarkshire	£10.81	£21.61	£85.45
Stirling	£15.71	£31.42	£69.19
West Dunbartonshire	£9.62	£19.25	£90.69
West Lothian	£13.59	£27.19	£65.68

WALES	Local	Day	Overnight
Blaenau Gwent	£6.12	£12.23	£66.74
Bridgend	£24.15	£48.31	£52.04
Caerphilly	£18.07	£36.14	£38.96
Cardiff	£29.80	£59.60	£78.60
Carmarthenshire	£16.28	£32.57	£39.97
Ceredigion	£18.42	£36.84	£40.94
Conwy	£16.21	£32.41	£60.35
Denbighshire	£19.60	£39.20	£45.11
Flintshire	£14.74	£29.48	£34.10
Gwynedd	£19.71	£39.41	£43.98
Isle Of Anglesey	£15.18	£30.36	£54.43
Merthyr Tydfil	£11.64	£23.29	£57.50
Monmouthshire	£16.53	£33.05	£56.79
Neath Port Talbot	£8.42	£16.84	£58.06
Newport	£15.21	£30.41	£96.01
Pembrokeshire	£17.26	£34.53	£53.83
Powys	£16.38	£32.75	£50.65
Rhondda, Cynon, Taff	£12.73	£25.46	£46.38
Swansea	£18.46	£36.92	£49.43
The Vale Of Glamorgan	£10.37	£20.75	£52.60
Torfaen	£12.77	£25.54	£35.02
Wrexham	£13.44	£26.88	£52.86

NORTHERN IRELAND	Local	Day (see note 4)	Overnight
Antrim & Newtownabbey	£14.30	£28.61	£52.66
Ards & North Down	£11.13	£22.26	£40.98
Armagh City, Banbridge & Craigavon	£10.19	£20.37	£37.50
Belfast City	£20.46	£40.92	£75.32
Causeway Coast & Glens	£14.73	£29.47	£54.24
Derry City & Strabane	£14.68	£29.35	£54.03
Fermanagh & Omagh	£18.60	£37.20	£68.47
Lisburn & Castlereagh City	£11.43	£22.86	£42.08
Mid & East Antrim	£14.23	£28.47	£52.40
Mid Ulster	£13.26	£26.52	£48.81
Newry, Mourne & Down	£14.60	£29.20	£53.76
Northern Ireland	£16.14	£32.28	£59.42

Sources:

For England, Scotland and Wales: DC Research analysis of various regional/national tourism volume and value datasets, 2017

<https://www.visitbritain.org/great-britain-tourism-survey-latest-monthly-overnight-data>, specifically: https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/40413193-260c_gb_tourist_2017_annual_report_v18.pdf

<https://www.visitbritain.org/gb-day-visits-survey-latest-results>, specifically: https://www.visitbritain.org/sites/default/files/vb-corporate/260139488_-_kantar_tns_-_gbdvs_2017_annual_report_v8.pdf

For Northern Ireland: DC Research analysis of various tourism volume and value datasets, 2018 (Based on data released in June 2019 for 2018)

<https://www.nisra.gov.uk/publications/annual-tourism-statistics-publications> and for local authority level: <https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/local-government-district-tourism-statistics/lgd-summary-tourism-estimates-2018.pdf>

Notes:

1. Domestic night value used as proxy for one night's domestic and/or overseas spend.
2. Spend assumptions will need to be updated as and when data is released.
3. Value for a 'local' visitor has been assumed to be 50% of a full day trip. Museums can adjust this to reflect bespoke circumstances based on scale and average visitor duration.
4. No day trip spend data available for NI, so average for GB data of day trip spend as a percentage of overnight spend is used (54.3%) as proxy. As with GB data, local spend is assumed to be 50% of day trip spend.

Table 2: Employment, Spend and Visitor Assumptions and Ready Reckoners		
Factor	Value	Rationale
Deadweight (Visitors)	0%	Visitor deadweight addressed via displacement ratios (for visitors) and dwell time calculations as well as local visitor adjustment on spend metrics.
Deadweight (Employment)	25%	Rationale based on established status of individual museums in their locations.
Deadweight (Spend on Goods and Services)	25%	Rationale based on established status of individual museums in their locations.
Employment leakage (use only if information on home location of employees is not available)	Small museum = 35% Medium museum = 15% Large museums = 10% Largest museum = 25%	Based on survey evidence split by size of museum
Spend leakage (use only if information on geography of spend patterns is not available)	Small museum = 37.5% Medium museum = 30% Large museums = 60% Largest museum = 50%	Based on survey evidence split by size of museum
Visitor leakage (use only if information on spend by visitors outside local area is not available)	Small museum = 0% Medium museum = 0% Large museums = 0% Largest museum = 0%	Based on HCA Guidance and GB VS / GB DVS results
Displacement (Employment)	37.5%	Based on HCA Guidance – Moderate (average of Low/Medium)
Displacement (Spend)	25%	Based on HCA Guidance – Low
Displacement (Visitors)	25%; 50%; or 75%	<ul style="list-style-type: none"> ▪ Low - 25% for museums that are a major or key attraction, drawing visitors to the area ▪ Medium – 50% for museums that are a moderate attraction, drawing visitors to the area ▪ High – 75% for museums that primarily serve a local audience
Multiplier (Employment, Spend and Visitors)	1.25 (Type II indirect and induced)	Based on HCA Guidance – use of composite sub-regional multiplier.
Source: DC Research adapted from derived from HM Treasury Green Book (2018); HCA Additionality Guide (2014); and Scottish Enterprise Additionality & Economic Impact Assessment Guidance Note (2008) as well as drawing on AIM member survey results from 2019 (and 2010).		

KEY TERMS AND DEFINITIONS

Additionality is a real increase in social value that would not have occurred in the absence of the intervention being appraised.

Deadweight refers to outcomes that would have occurred without the intervention. This is used to determine the difference that can be attributed to an intervention.

Displacement is the degree to which an increase in economic activity promoted by an intervention is offset by reductions in economic activity elsewhere.

Intervention refers to a policy, programme or project that is being appraised.

Leakage describes the leakage of benefits intended for a recipient group or area into another group or area.

Multiplier effects: Further economic activity (jobs, expenditure or income) associated with additional local income, local supplier purchases and longer-term effects.

Supply linkage multiplier (indirect multiplier): due to purchases made as a result of the intervention and further purchases associated with linked firms along the supply chain.

Income multiplier (consumption/induced multiplier): associated with local expenditure as a result of those who derive incomes from the direct and supply linkage impacts of the intervention.

Reference case: the position in terms of target outputs over a set period of time if the intervention did not take place.

Substitution: where firms or consumers substitute one activity for another as a result of intervention. As economic activity changes, it may lead to productivity changes which are costs or benefits.

Target area: The area within which benefits will be assessed.

Sources: derived from HM Treasury Green Book (2018); HCA Additionality Guide (2014); and Scottish Enterprise Additionality & Economic Impact Assessment Guidance Note (2008).

ⁱ This value is the average turnover per job in the museum sector (defined as Museum Activities Section 91.02 and taken from the Annual Business Survey – data from May 2019).

<https://www.ons.gov.uk/businessindustryandtrade/business/businessservices/datasets/uknonfinancialbusinesseconomyannualbusinesssurveysectionsas>



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