Economic Impact of the Independent Museum Sector

SUMMARY REPORT

2019

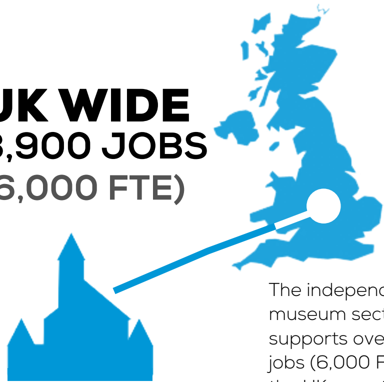
Association of Independent Museums

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

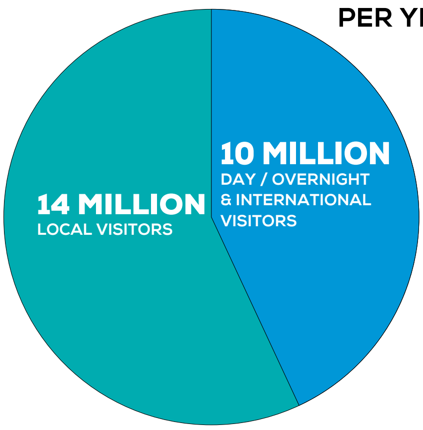
THE VALUE OF VOLUNTEERS

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

OVER 24 MILLION VISITORS PER YEAR



ATTRACTING VISITS AND VISITOR SPENDING

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.

KEY FINDINGS

- It is estimated **that total direct employment in the independent museum sector is more than 8,900 jobs**.
- This **equates to more than 6,000 full-time equivalent (FTE) direct jobs.**
- More than **three-quarters of these jobs are in the local areas where the independent museums are located** – showing the **significant direct local employment impacts** of independent museums.
- A notable proportion of independent museums do not have any paid staff. Based on the survey results this could be as many as 30% of independent museums.
- Therefore, it is not surprising that there is a **notable contribution from volunteers to the operation of independent museums** – based on the survey results, there are **over 34,000 regular volunteers**, contributing **almost half a million days per year**.
- Applying standard guidance (and using 2019 minimum wage rates) this level of volunteer days is estimated to be valued at more than £28 million.
- Independent museums **attract more than 24 million visitors per year** based on the survey results – and of this, it is estimated that **around 18.4 million of these visitors are adults**.
- The survey results show that **almost 14 million of these visitors are local visitors** – i.e. from the local area where the museum is located. Therefore, **more than 10 million are day/overnight visitors from further afield** – including international visitors – **showing the role that independent museums play in helping to attract visitors to local areas**.
- It is estimated that the **total overall (gross) spend of these visitors is almost £440 million** – and this expenditure will clearly contribute to the local economies where independent museums are located.
- Based on the survey results it is estimated that around two-thirds (i.e. **more than £290 million) of this spend takes place off-site** – i.e. beyond the museums themselves, directly contributing to the local economies. Applying standard economic assumptions to the off-site visitor expenditure, shows that **this level of off-site visitor spending equates to around 5,400 FTE jobs**.
- Adding together the direct employment and off-site visitor impacts shows that the independent museum sector's overall gross direct economic contribution is **11,400 FTE jobs**, which can also be expressed as £487 million of expenditure.
- These results provide estimates of the overall (gross) direct economic contribution of independent museums to the local economies in which they are located. Applying standard local economic multipliers to these direct impacts suggests that the **overall gross economic impact (i.e. direct, indirect and induced impacts) of the independent museum sector could be around 17,100 jobs** - which can also be expressed as £730 million of expenditure.
- It should be noted that these results provide estimates of the overall (gross) economic contribution of independent museums to the (local) economies in which they are located. The extent to which such economic contributions are net additional is best considered at the local level using the 2019 AIM Economic Impact Toolkit.

1. INTRODUCTION, AIMS AND CONTEXT

Introduction

The original Association of Independent Museums (AIM) Economic Impact Study and Toolkit was developed by DC Research in 2010, and a refreshed Toolkit was produced in 2014 with updated tourism spend information.

The original study and toolkit proved to be very influential across the UK museums sector, with the study findings being used in a range of advocacy purposes and the toolkit being used by a wide range of individual museums and geographic and thematic groups of museums across the UK.

However, this original work was based upon data and survey evidence from 2009 and needed to be updated.

Therefore, in 2019 AIM appointed DC Research and Durnin Research to update the toolkit and to carry out a revised analysis of the economic contribution of the independent museum sector in the UK.

Aims

The two key aims of the research study were:

- To update the AIM Economic Impact Toolkit.
- To refresh the analysis of the overall economic contribution made by the independent museum sector in the UK.

The Toolkit has been produced as a separate document, and this report provides the summary results from the research about the economic contribution of the independent museum sector in the UK.

Context

Since the publication of the original toolkit and analysis in 2010, the economic context for museums in the UK has significantly changed, and it was important for the toolkit and the analysis to be updated to ensure that such changes were reflected in both the new toolkit and also the updated analysis. Some of the key changes include:

- Reducing public sector funding for museums.
- The changing general economic (including tourism/visitor economy) conditions that affect museums.
- The expansion of the AIM membership - growing from 686 to 966, an increase of just under one-third, – with more larger museums now included

- in the membership as local authority to independent trust transitions have created large independent museum and cultural trusts.
- The approaches to developing and assessing economic impact have progressed, with funders increasingly more demanding in terms of evidence and robustness, additionality and causality of economic impacts in both funding bids and evaluation.
- This progress has also led to a better appreciation both within and outside the museum sector about assessing economic impact of museums.
- A growing/emerging appreciation of other, wider impacts of museums – above and beyond direct economic impacts.

2. APPROACH

The overall approach taken to assessing the economic impact of the independent museum sector and developing the AIM Economic Impact Toolkit 2019 was underpinned by the study team's approach to economic impact assessment which is **rooted in rigorous economics and best practice approaches** (i.e. HM Treasury Green Book (2018); Homes and Communities Agency Additionality Guide (2014); and Scottish Enterprise Additionality & Economic Impact Assessment Guidance Note (2008).

The Toolkit sets out how individual museums can estimate their overall (i.e. gross) economic impact, as well as providing a process through which individual museums can also identify their net additional economic impact.

This report, which focuses on the overall economic impact of the independent museum sector, assesses the gross economic impact of the sector.

Throughout this report, the results presented provide estimates of the overall (gross) economic contribution of independent museums to the (local) economies in which they are located. The extent to which such economic contributions are net additional is best considered at the local level using the 2019 AIM Economic Impact Toolkit.

The main source of primary research evidence used in the analysis that underpins the findings presented in this report, as well as the information contained in the 2019 AIM Economic Impact Toolkit, was a survey of AIM members.

An online survey of AIM members took place between March and May 2019, and more than 250 respondents engaged in the survey by providing some level of response. Once the responses were cleaned (including removing any responses that were not sufficiently detailed to be included in the analysis) and de- duplicated, this resulted in a total of 156 valid and usable replies. These replies account for over 16% of the total AIM membership of museums (966 at the time of the survey), and the respondents provide good coverage of the AIM membership in terms of museum size (which was regarded as the most important characteristic in terms of representativeness of responses) as well as geography.

The overall approach to the analysis used the results from the survey, identifying typical employment levels, volunteer activity, spend on goods and services, and visitor patterns (in terms of both number and type of visitor) for each category of museum size used by AIM (see below). These results were then aggregated across the rest of the AIM membership to provide an estimate of the overall economic contribution of the entire AIM membership. The AIM membership is used as a proxy to represent the overall independent museum sector in this analysis.

AIM members fall into four categories, and these categories were used as the basis for analysis and aggregation/extrapolation of the survey results to the broader independent sector. The categories are:

- Small (up to 20,000 visitors per annum).
- Medium (20,000 to 50,000 visitors per annum).
- Large (50,000 to 100,000 visitors per annum).
- Largest (over 100,000 visitors per annum).

Table 1 shows the breakdown of the AIM membership in 2019 by geography and by size.

Table 1: Breakdown of the AIM membership

	Largest Museum	Large Museum	Medium Museum	Small Museum	Total	Percent
East Midlands	2	6	11	51	70	7%
East of England	4	5	10	113	132	14%
London	5	4	17	69	95	10%
North East	2	2	2	16	22	2%
North West	3	5	16	59	83	9%
Northern Ireland			1	3	4	<1%
Scotland	3	7	15	59	84	9%
South East	15	13	19	111	158	16%
South West	8	4	25	109	146	15%
Wales	2	2	11	31	46	5%
West Midlands	7	1	8	60	76	8%
Yorkshire and Humberside	5	5	8	32	50	5%
Total	**56**	**54**	**143**	**713**	**966**	
Percent	**6%**	**6%**	**15%**	**74%**		**100%**

Source: Analysis of AIM membership data, 2019

Tables 2 and 3 show the breakdown of survey responses using the same categories.

Taken as a whole, survey responses were broadly consistent with the breakdown of AIM membership in Table 1, although there were some areas of over and under representation:

- In terms of size, largest, large and medium museums were all over- represented in the survey responses. While slightly under-represented, small museums still made up nearly two-thirds of all respondents.

- In terms of geography the East Midlands, Northern Ireland, Scotland, Wales and Yorkshire and The Humber were over-represented in responses, and East, London, North West, South East, South West and the West Midlands were under-represented.

As mentioned above, it is size of museum rather than geographic location that is used as the key characteristic that underpins the analysis and aggregation of the survey results. Geography is addressed – primarily through the use of regionally specific visitor spend metrics in the visitor impacts analysis – and as such, the geographic under/over-representations noted above are not critical to the analysis presented in this report.

Table 2: Breakdown of survey respondents – by geography

	Number	**Percent**
East Midlands	18	12%
East of England	10	7%
London	10	7%
North East	1	1%
North West	5	3%
Northern Ireland	8	5%
Scotland	36	24%
South East	24	16%
South West	11	7%
Wales	16	11%
West Midlands	13	9%
Yorkshire and Humberside	18	12%
Total	**153**	**100%**

Source: DC Research/Durnin Research analysis of AIM survey data, 2019

Table 3: Breakdown of survey respondents – by size

	Largest Museum	**Large Museum**	**Medium Museum**	**Small Museum**	**Total**
Number of Museums	23	12	22	96	**153**
Percent	15%	8%	14%	63%	**100%**

Source: DC Research/Durnin Research analysis of AIM survey data, 2019

3. THE ECONOMIC CONTRIBUTION OF THE INDEPENDENT MUSEUM SECTOR

This section presents the results of the analysis about the overall economic contribution of the independent museum sector, firstly, considering employment impacts, followed by visitor spend impacts, and finally an aggregation of the combined impacts of these aspects are presented to provide an overall estimate of the gross economic impact of the independent museum sector.

Employment

In terms of employment impacts, survey respondents were asked for information about the overall number of people employed at the museum, the full-time equivalent (FTE) number of employees, and also the proportion of employees that live within the local area where the museum is based.

122 survey respondents provided information on employment at their museums, and Table 4 shows the breakdown of these responses, the range of responses, and the median[i] values in terms of **overall employment**. The median number of employees in responding museums varies notably by size – from one employee for small museums to more than 90 staff in the largest museums.

Table 4: Total Employment in Museums Responding to the Survey

Size	Number of Responses	Range		Average (median)
		Minimum	Maximum	
Small	80	0	21	1
Medium	14	0	55	11
Large	11	0	197	22
Largest	17	20	310	97
Total	**122**	**0**	**185**	

Source: DC Research/Durnin Research analysis of AIM survey data, 2019

Table 5 shows the breakdown of these responses, the range of responses, and the median values in terms of **full-time equivalent (FTE) employment**. The median number of employees in responding museums again varies notably by size – from less than one FTE for small museums to more than 70 FTE staff in the largest museums.

Table 5: FTE Employment in Museums Responding to the Survey

Size	Number of Responses	Range		Average (median)
		Minimum	Maximum	
Small	80	0	13	0.65
Medium	14	0	40	6.5
Large	11	0	110	10
Largest	17	14	185	73
Total	**122**	**0**	**185**	

Source: DC Research/Durnin Research analysis of AIM survey data, 2019

Taking the median data from Tables 4 and 5 and applying it to the entire AIM membership results in a total jobs figure of more than 8,900. In terms of FTE employment, it is estimated that the independent museum sector has more than 6,000 FTE jobs. These results are broken down in Table 6 below.

Table 6: Employment in the Independent Museum Sector

Size	Overall Employment	FTE Employment
Small	713	463
Medium	1,573	930
Large	1,188	540
Largest	5,432	4,088
Total	**8,906**	**6,021**

Source: DC Research/Durnin Research analysis of AIM survey data, 2019

The survey also asked museums about the residential location of their employees (Table 7), which is used the calculate the proportion of employment that 'leaks' out of local economies. This is an important metric for the revised toolkit.

Table 7: Proportion of Paid Employees that Live Locally from Responding Museums

Size	Range		Average (median)
	Minimum	Maximum	
Small	5%	95%	65%
Medium	5%	95%	85%
Large	55%	95%	90%
Largest	45%	95%	75%

Source: DC Research/Durnin Research analysis of AIM survey data, 2019

These results show that for each size category of museum, the vast majority of paid employees live in the local area where the museum is located. Applying these results to the employment findings in Table 6 shows that more than **three-quarters of these jobs are in the local areas where the independent museums are located** – showing the **significant direct local employment impacts** of independent museums.

Role & Contribution of Volunteers

The survey also found that not all museums have paid staff, with **30% of responding museums reporting that they do not employ any staff at all**. In this context the role and contribution of volunteers can be critical for some museums.

The survey asked respondents about the number of regular volunteers, and the annual number of volunteer days at their museum. Applying the survey results across the entire AIM membership shows that **there are almost 34,500 regular volunteers, contributing 494,000 days per year.**

Assuming a standard working day of seven hours and applying the 2019 minimum wage rate, **this scale of volunteer days can be valued at almost £28.4 million**.

Summary of Employment Impact Findings

- It is estimated **that total direct employment in the independent museum sector is more than 8,900 jobs**.
- This **equates to more than 6,000 full-time equivalent (FTE) direct jobs.**
- More than **three-quarters of these jobs are in the local areas where the independent museums are located** – showing the **significant direct local employment impacts** of independent museums.
- A notable proportion of independent museums do not have any paid staff. Based on the survey results this could be as many as 30% of independent museums.
- Therefore, it is not surprising that there is a **notable contribution from volunteers to the operation of independent museums** – based on the survey results, there are **over 34,000 regular volunteers**, contributing **almost half a million days per year**.
- Applying standard guidance (and using 2019 minimum wage rates) this level of volunteer days is estimated to be valued at more than £28 million.

Visitors

In terms of the impacts of visitor spending, survey respondents were asked for information about the total number of visitors to their museums, the type of visitors, and the cost of admission for visitors – as well as the importance of the visitor economy to the local area in which the museum is based and the contribution of the museum to the overall tourism offer.

122 survey respondents gave information on visitors to their museums and Table 8 below shows the breakdown of these responses, the range of responses, and the median number of visitors to each category of museum.

Table 8: Number of Visitors in Museums Responding to the Survey

Size	Number of Responses	Range		Average (median)
		Minimum	Maximum	
Small	80	350	20,000	5,800
Medium	14	21,179	44,793	28,571
Large	11	50,000	81,467	63,396
Largest	17	101,000	831,548	229,888
Total	**122**	**350**	**831,548**	

Source: DC Research/Durnin Research analysis of AIM survey data, 2019

Taking the median average data in Table 8 and applying it to the entire AIM membership results in an estimated total number of visitors to independent museums in excess of 24.5 million per year – see Table 9.

Table 9: Total Estimated Number of Visitors to independent museums in the UK

Size	Visitors (rounded)
Small	4,135,400
Medium	4,085,700
Large	3,423,400
Largest	12,873,700
Total	**24,518,200**

Source: DC Research/Durnin Research analysis of AIM survey data, 2019

To assess the economic impact of these visitors, it is important to distinguish between different types of visitor – especially between local visitors, day trippers, and overnight visitors – with different spend values and different attributions of the proportion of the day being applied to different types of visitor.

Museums were asked about the proportion of their visitors that were local, national and international, and Tables 10, 11 and 12 set out the number of local, national and international visitors to responding museums by size.

Table 10: Proportion of local visitors in responding museums

	Range		Average (median)
Size	Minimum	Maximum	
Small	1%	99%	62%
Medium	7%	95%	70%
Large	7%	90%	56%
Largest	8%	82%	52%

Source: DC Research/Durnin Research analysis of AIM survey data, 2019

Table 11: Proportion of national visitors in responding museums

	Range		Average (median)
Size	Minimum	Maximum	
Small	1%	90%	33%
Medium	4%	92%	25%
Large	10%	90%	39%
Largest	13%	77%	39%

Source: DC Research/Durnin Research analysis of AIM survey data, 2019

Table 12: Proportion of international visitors in responding museums

	Range		Average (median)
Size	Minimum	Maximum	
Small	0%	35%	5%
Medium	0%	50%	5%
Large	0%	50%	6%
Largest	1%	50%	9%

Source: DC Research/Durnin Research analysis of AIM survey data, 2019

Based on these results, Table 13 shows the estimated number of visitors to independent museums by visitor type.

The table shows that almost 14 million are local visitors, 8.8 million are national visitors from elsewhere in the UK, and 1.7 million are international visitors.

Table 13: Total Estimated Number of Visitors to Independent Museums in the UK - by visitor type (rounded)				
Size	Local	National	International	Visitors
Small	2,558,000	1,364,300	213,200	4,135,400
Medium	2,847,600	1,031,700	206,300	4,085,700
Large	1,901,900	1,331,300	190,200	3,423,400
Largest	6,689,300	5,048,500	1,135,900	12,873,700
Total	**13,996,700**	**8,775,800**	**1,745,600**	**24,518,200**
Source: DC Research/Durnin Research analysis of AIM survey data, 2019				

Prior to assessing the visitor spend impacts, it is important to make a judgement on the adult/child split in terms of visitor numbers – this is because the visitor spend data used relates to the typical spend per adult visitor.

In terms of the adult/child split, an assumption of 75%/25% has been applied – i.e. that 25% of visitors to the museums are children, and that 75% of visitors are adults[ii].

Applying this ratio to the overall visitor numbers in Tables 9 and 13, results in an **estimate of the total number of adult visitors to independent museums of 18.4 million per year**.

In order to assess the gross visitor spend impacts of these 18.4 million adult visitors, official visitor volume and value data from Visit Britain[iii] has been used to develop visitor spend values specific to the AIM membership – i.e. bespoke average visitor spend values for each category of museum have been developed to reflect the regional geographic make-up of that cohort of AIM members. The following spend metrics have been used for day (i.e. national) and overnight (i.e. international) visitors, with 'local' visitor metrics of one-half of these values being applied for local visitors.

- Small museum - £33.36
- Medium - £34.51
- Large - £33.86
- Largest - £33.00

Based on all this, the estimated impact of the independent museum sector in the UK is set out in Table 14 below, with gross visitor spend estimated to be almost £440 million.

Table 14: Total Estimated Visitors Spend Impacts from Visitors to Independent Museums in the UK - by Visitor Type (rounded)			
Size	Local Visitors	National and International Visitors	Total
Small	£31,998,300	£39,464,600	£71,463,000
Medium	£36,848,700	£32,042,300	£68,891,000
Large	£24,147,900	£38,636,700	£62,784,600
Largest	£82,773,900	£153,053,700	£235,827,600
Total	**£175,768,800**	**£263,197,300**	**£438,966,100**
Source: DC Research/Durnin Research analysis of AIM survey data, 2019			

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.

Using results from the survey that show that the average (median) values of on-site spend[iv] of £3.00 for Small and Medium Museums and £10.65 for Large/Largest Museums, it is estimated that around £148.7 million of the total spend in Table 14 occurs onsite, and resultantly the **estimate of off-site visitor impacts for visitors to independent museums across the UK of £290.3 million.**

In order to convert this value of visitor spend to employment equivalents (i.e. the number of jobs this supports) drawing on previous research[v] a value of £54,000 turnover per job is used to estimate the number of FTE jobs that this spend supports. Applying this ratio shows that the **off-site spend impacts of visitors to independent museums equates to around 5,376 jobs.**

Summary of Visitor Impact Findings

- Independent museums **attract more than 24 million visitors per year** based on the survey results – and of this, it is estimated that **around 18.4 million of these visitors are adults**.
- The survey result show that **almost 14 million of these visitors are local visitors** – i.e. from the local area where the museum is located. Therefore, **more than 10 million are day/overnight visitors from further afield** – including international visitors – **showing the role that independent museums play in helping to attract visitors to local areas**.
- It is estimated that the **total overall (gross) spend of these visitors is almost £440 million** – and this expenditure will clearly contribute to the local economies where independent museums are located.
- Based on the survey results it is estimated that around two-thirds (i.e. **more than £290 million) of this spend takes place off-site** – i.e. beyond the museums themselves, directly contributing to the local economies. Applying standard economic assumptions to the off-site visitor expenditure, shows that **this level of off-site visitor spending equates to around 5,400 FTE jobs**

Overall Impacts of the Independent Museum Sector

In order to provide an estimate of the overall, gross direct economic contribution of the independent museum sector, the direct employment impacts (total of 6,021 FTE jobs) can be added to the off-site visitor impacts expressed in employment terms (total of 5,375 FTE jobs) – **leading to an overall gross employment impact for the independent museum sector of 11,396 FTE jobs.**

These jobs can also be expressed in terms of expenditure, and applying standard values of spend per job from the aforementioned tourism research[vi] and also drawing on Annual Business Survey data for museum specific jobs[vii], shows that this level of employment can be expressed as £487 million of expenditure.

These results provide estimates of the overall (gross) direct economic contribution of independent museums to the local economies in which they are located.

In order to estimate the wider (i.e. indirect and induced effects[viii]) that result from this level of direct economic contribution, standard local multiplier values can be applied to the direct impacts. Adopting an indirect and induced multiplier of 1.5[ix] suggests that the **overall gross economic impact (i.e. direct, indirect and induced impacts) of the independent museum sector could be around 17,100 jobs.**

These jobs can also be expressed in terms of expenditure, and applying the same standard values of spend per job and Annual Business Survey data for museum specific jobs, shows that this level of employment can also be expressed as £730 million of expenditure.

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[i] The median rather than mean values from the survey results are used throughout this analysis. The median results are thought to provide a more appropriate basis for analysis as they are less likely to be influenced by notable outliers than the mean values for the same data.

[ii] This 25% assumption is applied building on a number of sources, including a range of recent individual museum economic impact studies carried out by the study team (which shows, on average, the child proportion being between one-fifth and one-quarter), as well as previous AIM research about economic impact and recent data from DCMS.

[iii] DC Research/Durnin Research analysis of regional/national tourism volume and value datasets, 2017 i.e. 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

[iv] Median values from the survey results of the on-site cost of admission for small/medium and large/largest categories of museums are used as a proxy for all on-site spend. These results have been cross-checked with various research studies across the UK that have reported on-site admission, retail and catering spend values and based on these cross-checks the results presented are regarded as appropriate estimates that can be used for this purpose.

[v] Tourism: jobs and growth The economic contribution of the tourism economy in the UK (2013) by Deloitte/Oxford Economics shows that £54,000 of spend is required to support one additional job and this metric has been applied in this analysis. https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Tourism_Jobs_and_Growth_2013.pdf

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[vii] 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

[viii] Indirect Impacts – i.e. the supplier linkage effects generated elsewhere in the local economy due to purchases made as a result of the museum and further purchases associated with linked firms along the supply chain. Induced Impacts – i.e. the income multiplier effects generated in the local economy as a consequence of the spending of wages/salaries of those employed through both the direct and indirect impacts.

[ix] The selection of a Type II (indirect and induced) multiplier of 1.5 is based on the HCA Additionality Guide 2014. See Tables 4.12 (p.35) and 4.14 (p.36) in the Guide and the museum Specific example on p.43 of the guidance. https://www.gov.uk/government/publications/additionality-guide

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