ONTARIO'S MUSEUMS 2014 PROFILE

HIGHLIGHTS

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ONTARIO MUSEUM ASSOCIATION
MUSÉES DE L'ONTARIO

NOTES ON *ONTARIO'S MUSEUMS 2014 PROFILE: HIGHLIGHTS*

This *Highlights* document summarizes the submissions of 184 Ontario museums to a survey designed and conducted by the Ontario Museum Association (OMA) in 2014/2015, and analysed by Hill Strategies Research. The OMA plans to make the full results of the survey available in summer 2016 as the *Ontario's Museums 2014 Profile*.

The survey, which was largely conducted online, included questions regarding:

- Basic information about the museum
- Museum structure and governance
- Admissions, website, and social media activity
- Museum policies, programs, and partnerships
- Collections
- Human resources
- Operating revenues and expenses
- Current challenges and future concerns

Some museums skipped a few questions. The percentages in this report are based on the number of respondents to each question, which might not equal the total number of respondents (184).

In some cases, a municipality or other body that manages many museums responded on behalf of multiple museums. These organizations are counted as one respondent.

In general, the data in this document relate to museums' fiscal years ending in 2014 or early 2015.

Other Data Sets

Some key elements from two data collections were also analysed for the full profile and are included, in part, in this *Highlights* document: statistics from the 2014/2015 Community Museum Operating Grant program of the Province of Ontario (excluding detailed financial data); and museum-relevant data from ArtsBuild Ontario's Bricks&Mortar survey.

Solid Response Rate

Overall, the *Government of Canada Survey of Heritage Institutions* estimated that there were 667 heritage institutions in Ontario in 2011. Of these, 134 were primarily zoos, aquariums, or archives. These organizations were beyond the scope of this survey (except for a small number of archives that responded to the OMA survey). That leaves 533 museums, art galleries, and historic/heritage sites in the *Survey of Heritage Institutions*. The 184 OMA survey respondents represent 35% of these 533 organizations. Many of the largest museums located in Ontario responded to the survey, with the exception of some provincial and national agencies.

While this is a solid response rate, the survey respondents were not randomly selected to participate. As such, a margin of error cannot be applied to the response rate. (This is normal for a survey of this type, where respondents self-select whether to complete the survey.) If the respondents had been selected via a random sample, the 184 submissions would have provided a maximum margin of error of plus or minus 5.9 percentage points, 19 times out of 20. This is close to the typically desired margin of error in a randomized sample (plus or minus 5 percentage points, 19 times out of 20).

In general, the term "museums" will be used in this report to describe respondents.

Kelly Hill
Hill Strategies Research

INTRODUCTION

Research is fundamental to the success of museum work. Museums not only provide access to and facilitate information sharing, they are innovators, active in new research and the creation of knowledge. Research is also used for audience development and museum self-assessment. It informs collections, exhibitions and programs.

As a sector though, little system-wide research and analysis has been available. The Ontario Museum Association's Looking Ahead Initiative provided an important opportunity to address this. One of the main objectives of the project was the development of measures to provide an accurate, ongoing assessment of the impact and potential of museums.

Based on responses from 184 museums to an institutional survey, and with data analysis by Hill Strategies, the Looking Ahead Initiative developed a profile of Ontario museums in 2014. It begins the important work of building compelling evidence to demonstrate museum impacts and their contribution to Ontario's economy, and the province's social, educational and cultural vitality. It also identifies the realities of operating museums in Ontario today.

The *Ontario's Museums 2014 Profile* supports **Ontario's Museums 2025: Strategic Vision & Action Plan**, an ambitious plan guided by a Task Force of dedicated museum sector leaders.

As its core vision *Ontario's Museums 2025* identifies four goals:

1. **Vibrant & Vital Museums**
2. **Relevant & Meaningful Collections**
3. **Strong & Successful Sector**
4. **Effective & Collaborative Workforce**

This *Ontario's Museums 2014 Profile: Highlights* document provides a current snapshot of Ontario's museums in these key areas. It is meant to complement *Ontario's Museums 2025*, and identify a starting point from which to mark our progress as we move towards achieving the vision.

This *Highlights* document and the full *Ontario's Museums 2014 Profile* (to be released in summer 2016) are meant as a beginning. We plan to revisit the full profile in subsequent years, for regular updates, to be used for ongoing critical assessment of the museum sector's successes and challenges. The *Ontario's Museums 2014 Profile* will serve as the foundation for building a comprehensive sector-wide profile that demonstrates the ongoing economic, social and cultural impact of Ontario's museums. This will serve museums and our stakeholders in decision-making, planning and advocacy.

To realize this goal, the OMA will continue to work with Ontario's museums. The *Ontario's Museums 2014 Profile* would not have been possible without the work and generous participation of museums across Ontario. The OMA wishes to thank the museum professionals and volunteers who completed a long survey with due care and attention. We greatly appreciate the dedication and significant time involved.

The OMA would also like to extend our appreciation to ArtsBuild Ontario for entering into a data sharing agreement in 2015. Both organizations are committed to sharing data for the sector's benefit, working towards a robust and dynamic solution to ongoing data collection needs. For this *Highlights* document, we used valuable information collected by ArtsBuild to inform our report on the status of museum facilities.

Of note, we would also want to acknowledge the recent work of the Department of Canadian Heritage in developing and disseminating the *Government of Canada Survey of Heritage Institutions*, including the sharing of the provincial-level data for Ontario with the OMA in 2016.

The *Ontario's Museums 2014 Profile* also benefited from the 2014 performance measures data provided by the Ontario Ministry of Tourism, Culture and Sport (MTCS) on the 173 museums funded under the Community Museums Operating Grant (CMOG) program. We thank the Ministry of Tourism, Culture and Sport for this contribution. We also thank MTCS for their financial support of *Ontario's Museums 2014 Profile*.

The Ontario Museum Association looks forward to continuing its work with funders, partners and members to ensure that sector data needs are met. This data will support the creation of rich museum experiences for the benefit of our visitors across the province.

Clark Bernat
OMA President

Marie Lalonde
OMA Executive Director

Towards
VIBRANT & VITAL MUSEUMS

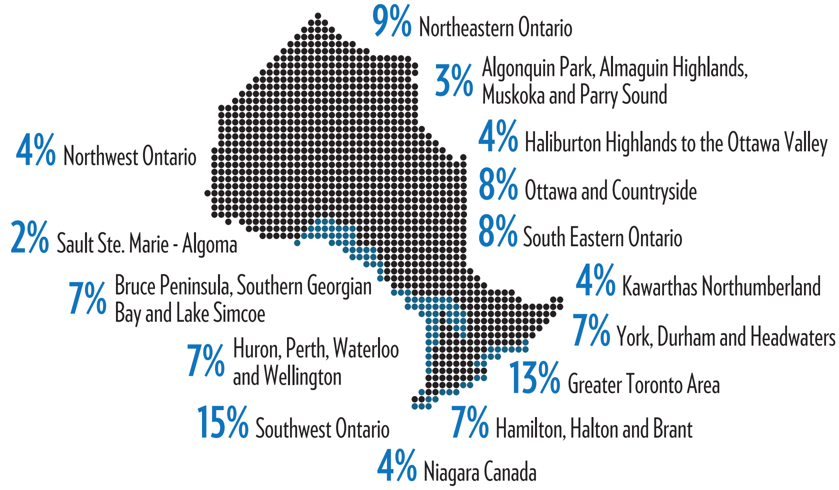
A wide range of museums from all areas of the province responded to the survey. Among respondents, community museums are the most common (39%), followed by history museums (25%), art galleries (8%), living history sites (7%), and historic or heritage sites (6%). 84% of museums also reported a secondary activity. Archives, history museums, and historic/heritage sites were most common in this regard.

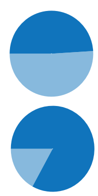
All 184 museums responding to the survey are not-for-profit organizations, but not all are separately incorporated as such. Nearly three-quarters (73%) of the respondents are incorporated, including the 50% that are registered charities. Another 36% of responding museums are government agencies or quasi-government organizations.

Most of the museums (94%) have regular hours during which they are open to the public. 68% of these museums are open all 12 months of the year (110 out of 162 museums reporting).

Nearly 5 million onsite visitors & 14 million online visitors

Respondent Profile





49% of respondents are CMOG recipients

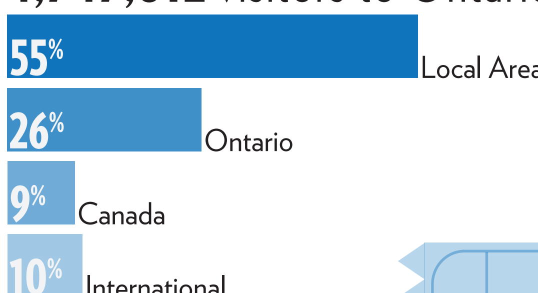
83% of respondents are OMA members

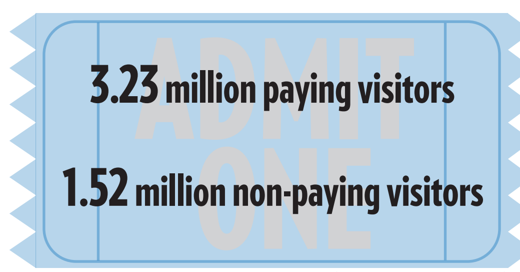
On average, the responding museums have been in operation for 43 years.

The oldest museum is 115 years old, and the youngest museum is 3 years old.

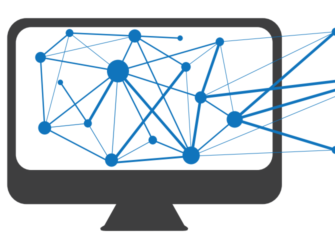
Visitor Numbers

4,747,812 visitors to Ontario's museums
(146 respondents)





(146 respondents)

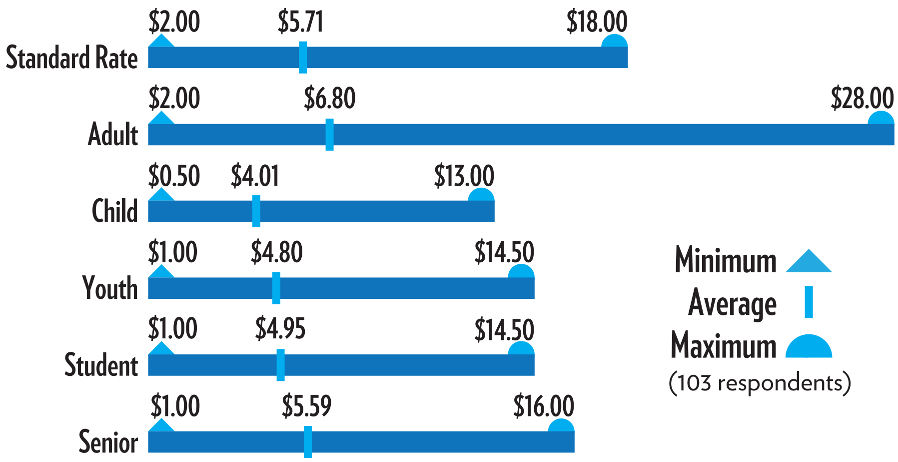


13.7 million web visits (83 respondents)

An average of 165,030 per museum

97% of museum websites have visiting information (175 respondents)

Admission Prices



88% of museums are free to the public at select times

Free and low cost access to museums

Over one-half (56%) of the museums charge an admission fee, but the vast majority (79%) of these museums have dates and times when the public can visit for free. Admission is always free in 22% of the responding museums. The remaining 23% of museums accept donations, some with a suggested amount.

Among responding museums, 88% are free to the public at select times.

Programming Statistics

77% of museums provide education programming tied to Ontario's curriculum

72% offer online educational resources

36% offer virtual exhibitions

(175 respondents)

850 TEMPORARY EXHIBITS DISPLAYED

(162 respondents)

Over 570,000 student visits

About three-quarters (77%) of responding museums provide educational programming tied to Ontario's curriculum. The most common educational programs include guided or unguided visits (73% of all 184 museums), staff visits to schools (47%), and curriculum guides or lesson plans (27%). In terms of school visits to museums, 123 museums (67% of respondents) received a total of 15,300 school groups and 572,800 students.

Towards

RELEVANT & MEANINGFUL COLLECTIONS

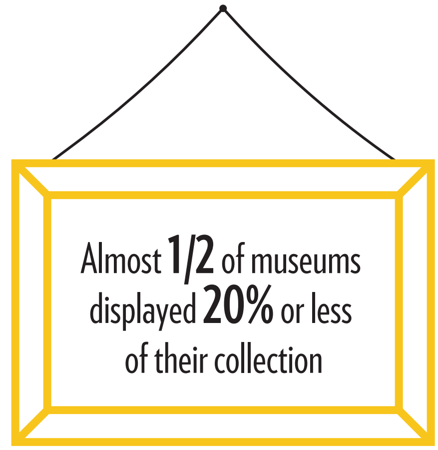
Collections are a major focus of Ontario's museums: 95% of responding museums own or manage a collection on an ongoing basis. Many museums are responsible for the care of large collections: over one-half (52%) of responding museums with a collection have over 10,000 items in their collection.

Typically, only a small proportion of museum collections are on public display during a given year. During the fiscal year covered by the OMA survey, almost one-half of responding museums displayed 20% or less of their collections.

Some of these objects are at risk. Responding museums indicated that, typically, about two-thirds of their collections are stored in areas that museum representatives "consider to be adequate (i.e. in secure premises with appropriate environmental conditions)".

A majority (60%) of 184 responding museums own their own facility. From ArtsBuild Ontario, we know that many of these facilities are older; 68% are at least 75 years old, and 43% are registered or listed heritage buildings. 58 museums reported their facility expenditures to ArtsBuild, with an average expenditure of $431,000 and median expenditure of $122,000.

Collections

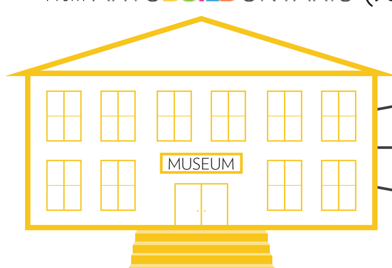


59% of museum websites have collections information
(175 respondents)

Museum Facilities

60% of museums own their own facility | **43%** of museums are heritage buildings

From ARTSBUILDONTARIO (96 respondents)



68% of museums are at least 75 years old
38% of museums have a capital reserve fund
44% of facilities meet the museum's needs

Plans for future facilities

37% renovate existing facilities
35% build new facility
11% build an addition
10% lease a new facility or additional space
4% purchase new facility or additional space
2% purchase land for the future

Stages of capital plans

42% no significant planning yet
21% early planning stages
16% intermediate stage
14% feasibility studies complete
4% "ready to go"
3% funding plan done

Towards EFFECTIVE & COLLABORATIVE WORKFORCE

Just over 3,000 staff members work at responding museums, whether on a full-time (1,797) or part-time (1,329) basis. Over 13,000 volunteers worked with Ontario museums.

About two-thirds (65%) of responding museums have both full-time and part-time staff, while 13% have full-time staff only, 13% have part-time staff only, and the remaining 9% have no paid staff at all.

Volunteers worked an estimated total of 777,300 hours (157 responding museums). This is the equivalent of 405 full-time full-year jobs. Using the average hourly wage in Canadian arts, entertainment, and recreation industries in 2014 ($17.55), the 777,300 volunteer hours at these 157 museums can be valued at $13.6 million.

The four largest museums responding to the survey account for 66% of the full-time staff members and 42% of the part-time staff at all museums. On the other hand, the four largest museums represent 17% of all volunteers and 44% of total reported volunteer hours.

Workforce

Ontario's museums create 3,126 jobs and opportunities for over 13,000 volunteers

57.5%
Full-Time

42.5%
Part-Time

Revenue Groups	Museums	Full-Time Staff	Part-Time Staff	Volunteers	Volunteer Hours
<140K	25	39	86	1,140	54,467
160K-320K	26	58	62	1,065	53,190
350K-650K	23	92	112	1,590	94,642
700K-1.9M	25	184	335	2,880	118,887
2M-6M	5	155	30	1,204	29,817
40M+	4	1,044	450	1,601	280,827
TOTAL	**108**	**1,572**	**1,075**	**9,480**	**631,830**

Staff expenditures account for 49% of total expenses

(118 respondents)

Volunteer hours are valued at
$13.6 million
(157 respondents)

For every **1** staff member

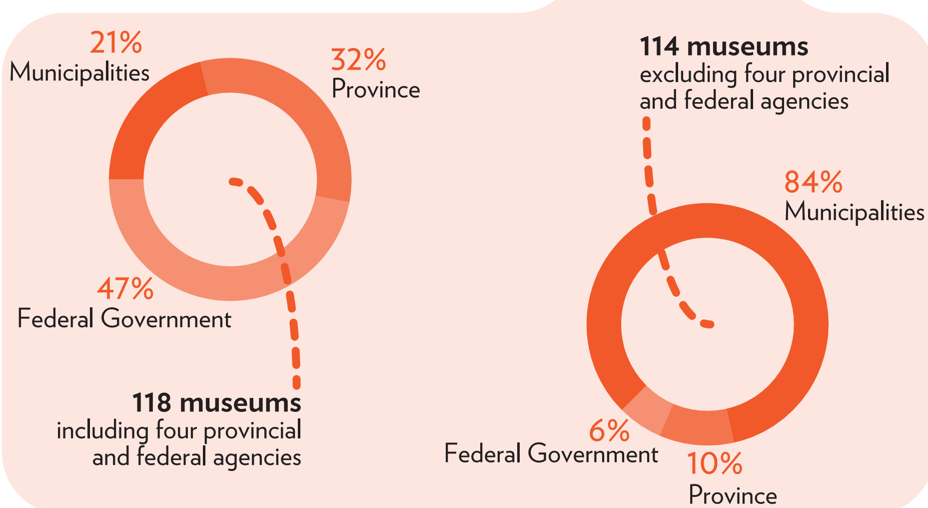
There are **4** volunteers

Revenue: $291.9 million

$167.5 million: government
$74.4 million: earned
$34.5 million: private sector
$15.5 million: other sources

(118 respondents)

Revenue Groups	Museums	Earned (%)	Private (%)	Government (%)	Other (%)
<140K	33	19	16	60	5
160K-320K	27	12	14	70	4
350K-650K	24	20	13	63	4
700K-1.9M	25	21	8	67	5
2M-6M	5	30	26	40	4
40M+	4	27	11	57	6
TOTAL	**118**	**26%**	**12%**	**57%**	**5%**



Municipalities are the main public sector funder for most groups of museums

The 118 museums that provided details about their operating finances had total revenues of $291.9 million and total expenditures of $284.9 million, resulting in a collective surplus of $6.9 million (2.4% of total revenues). The revenues of the four largest museums alone account for $223.9 million (77% of the total revenues).

Museums of different budget sizes have substantially different revenue components. As a percentage of total revenues:

- Earned revenues are highest for larger museums.
- Private sector revenues show no consistent pattern by size of museum.
- Government revenues are lowest for the second-largest group of museums (budgets between $2 and $6 million): 40%. Note: Three of these four museums are art galleries. All other museum groups receive over one-half of their total revenues from government sources.
- "Other" revenue sources are quite consistent among the six groups of museums.

The four largest museums are provincial and federal museums. They receive almost all of their government funding from provincial and federal sources. These four museums account for 92% of total provincial funding and 97% of federal funding for all 118 museums reporting their financial data.

CMOG funding represents 5.9% of total revenues

Community Museum Operating Grant recipients leverage provincial investment to create greater impact: jobs, collections and programs

CMOG Recipient	CMOG Non-Recipient
Median revenues **$283,000***	Median revenues **$159,000***
67% with collections >10,000 objects	**29%** with collections >10,000 objects
5.2 full-time staff per museum	**1.7** full-time staff per museum
7.4 part-time staff per museum	**2.7** part-time staff per museum
66% government funding	**26%** government funding
56% municipal funding	**15%** municipal funding
7% provincial funding	**2%** provincial funding

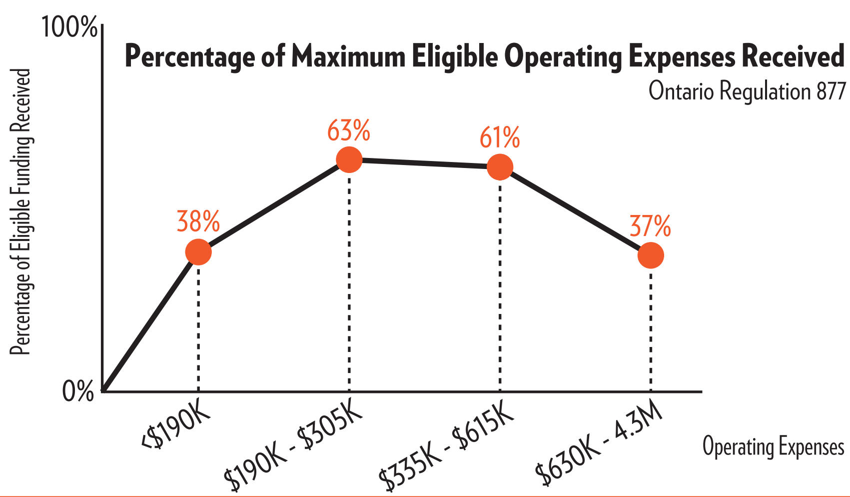
*The financial differences are based on those museums reporting financial data: 82 of the 91 CMOG recipients, 14 of 39 CMOG-eligible but unfunded museums.

CMOG actual funding amounts fall well below established funding levels

The actual grant level of 81 CMOG recipients was approx. 45% of their maximum funding level

Funding received	Eligible funding not granted
$2,400,000	**$2,600,000**

← – – – – – – – – **$5,000,000** – – – – – – – – →



Note: CMOG funding is based on a percentage of expenses, but some expenditures are considered non-eligible. Because only total expenses were captured in the OMA survey (not CMOG-eligible expenses), the analysis below uses total expenses as a proxy for eligible expenses. To test resulting bias, the analysis was done three different ways, with very similar outcomes. Because all three versions of the analysis yielded very similar results, only the first version is reported here.

Note: 173 museums throughout Ontario received $5,007,585 from the Community Museum Operating Grant program. 91 of these museums were survey respondents.

Ninety-one survey respondents received provincial government funding through the CMOG program in 2014/2015. This is almost exactly one-half of the responding museums. Thirty-nine survey respondents may have been eligible for CMOG funding but did not receive a grant in their most recent fiscal year.

A much larger proportion of CMOG recipients (64% of the 91 museums) than non-recipients (15% of the 39 museums) are part of a municipal government structure. In contrast, fewer CMOG recipients (27%) than non-recipients (62%) are independent not-for-profit organizations.

In examining the two groups, CMOG recipients tend to have higher revenues, larger collections, and more staff than non-recipients.

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