MUSEUMS ASSOCIATION

MUSEUMS IN THE UK 2017 REPORT

April 2017

www.museumsassociation.org

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FOREWORD

2016 was a turbulent year for museums and the communities that they serve. Continuing cuts to the public sector, changes in government, Brexit and a rise in intolerance have led to uncertainty and insecurity for many.

This survey points to a mixed picture for museums in the UK. Museums are more popular than ever and are increasingly working with disadvantaged and under-represented groups to meet the challenges of a divided and unequal society. But there is still more to be done, which is why the Museums Association (MA) is launching the second phase of its Museums Change Lives campaign and encouraging museums to redouble their efforts to connect with their communities.

We know that people who work in and with museums are committed and passionate about what they do but we also know that they are being asked to do more and this survey points to the fact that cuts have led to a loss of expertise and talent. At the same time there has also been a marked growth in volunteering which contributes a significant value to our museums. The MA will support the whole workforce to develop the skills they need to work in partnership with communities and other stakeholders to create sustainable and vibrant organsiations.

The survey shows that museums have worked hard to generate additional income in often ingenious ways, but sometimes this is not enough. In the past year museums in Lancashire and Kirklees have closed and many publicly-funded museums face further cuts to their budgets. For many museums earned income cannot completely replace public investment and the MA will continue to campaign and advocate for the retention of public funding for museums through initiatives such as Museums Day and the Museums Taskforce.

I am delighted that the MA has worked in partnership with organisations across the UK to gather data for this survey and I am especially grateful to the Museum Development Network for their collaboration on the survey in England.

We will continue to gather the evidence and data that helps those that work in and support museums understand the sector's strengths and weaknesses and the economic and social value that museums deliver, and that helps us make a strong case for sustainable museums at the heart of their communities.

Sharon Heal
Director, Museums Association

INTRODUCTION

The MA has been documenting the health of the UK's museum sector through a series of surveys since 2011. This year's report is based on our first annual Museums Survey (carried out in autumn 2016 in partnership with the Museums Development Network in England) and is supplemented with data and research from other trusted sources.

Since 2011 our research has demonstrated the vital place that museums occupy in the UK's cultural, social and economic life. This year's report builds on that evidence. It reveals that museums are increasing their visitor numbers – often to record highs; they are engaging with new audiences and local communities; and they are supporting tourism and economic growth.

However, our research also shows that these successes have been put at risk by public funding cuts. Many museums have been forced to take difficult decisions: reducing their opening hours; cutting back on school visits; losing skilled museum employees; and, in the worst cases, closing their doors. Our research shows that at least 64 museums in the UK have closed since 2010 – the vast majority due to public funding cuts (see our closures map on p13).

The impacts of funding cuts are visible across the museum sector, but nowhere more so than in the large number of museums that rely on local government funding. Local government has taken a leading role in providing museums for cities, town and regions across the UK for more than a century. However, wider financial pressures on local authorities mean that many are reducing their support for museums. Government figures for England show that local authority spending on museums and galleries has fallen by 31% in real terms between 2010 and 2016[1]. These cuts have particularly affected disadvantaged areas, and the MA remains concerned that museums should be accessible to all.

However, funding cuts are far from the only force that is shaping the future of the sector and influencing how museums operate today. A confluence of other, interrelated factors is also at play. Within the sector, key trends include the broadening skill-sets of the museum workforce, the shifting relationship between museums and their audiences, the digital revolution, a move towards socially-engaged practice, and a greater focus on commercial enterprise and income generation. External factors are also having an impact: the challenges thrown up by Brexit and other constitutional debates, the increasingly divided society that we live in, and the growth of illicit trade in cultural objects. These trends have put pressure on museums, but they have also led to the emergence of creative thinking and dynamic new practice.

This report shows a sector that is in many ways succeeding. Museums are uniquely well placed to help people understand the world, their place in it, and how to improve it for future generations. Their dedicated staff and volunteers and their outstanding collections enable them to have a huge impact. However, the ability of museums to deliver depends on the support of many stakeholders – both public and private – in order to overcome the financial and operational challenges that they face.

[1] Data taken from Department for Communities and Local Government figures: www.gov.uk/government/collections/local-authority-revenue-expenditure-and-financing ; Equivalent data on local authority spending on museums in Scotland, Wales and Northern Ireland not available at time of writing. However, all three devolved administrations report declining levels of local authority cultural spending.

KEY TRENDS

Museum Audiences

- Museums remain hugely popular with the public across the UK. Almost half of all museums reported a year-on-year increase in visitor numbers. This reflects positive government statistics on museum attendance.

Museum Closures

- At least 64 museums in the UK have closed since 2010, with 15 museum closures in 2016 alone. The majority of closures are the result of reduced public funding.

Museum Finances

- Many publicly-funded museums are facing a funding crisis. Local authorities in England have cut spending on museums and galleries by 31% in real-terms between 2010 and 2016, while devolved administrations have also seen substantial cuts. Across the UK, 24% of museums reported a decrease in public income in 2015/16, including 34% of local authority museums and 75% of independent former local authority museums.
- Museums of all types are succeeding in efforts to increase their earned income and fundraising, but require time and investment to maintain this momentum.

Museum Workforce

- Most museums reported stable staff numbers, with an average of 12 FTE staff per museum. However, publicly funded museums were substantially more likely to report a year-on-year decrease in staff numbers, with 26% of local authority museums, 55% of national museums and 58% of independent former local authority museums reporting staff cuts.
- There are widespread concerns about low morale and the loss of experienced staff across the UK.

Public-Facing Services

- Museums are prioritising public-facing services in the face of cuts, such as public events, temporary exhibitions and school visits.
- One in 10 museums reported not having its own website or not using social media.
- Museums are increasingly working with disadvantaged and under-represented groups to meet the challenges of a divided and unequal society.

Economic Impact

- Museums are important contributors to local economies, with an average reported turnover of £1.28m.
- Museums continue to form strong partnerships that boost tourism, research, economic development and regeneration.

1 BACKGROUND TO THE SURVEY

Between September and November 2016, museums were asked to complete a survey on their performance and activity during the financial year 2015/16 covering the following topics: type of museum; visitor numbers and engagement; museum finances; volunteers and staff; education work; and challenges and opportunities for the future.

In order to gain a broader overview, the MA worked in partnership with the Museum Development Network in England, and asked museum colleagues and partners across the UK to distribute the survey among their networks and extend its reach as far as possible. Therefore, while some of the data is similar to that of our previous Cuts Surveys, the sample size and questions differ and the results presented here should not be read as a like for like comparison. All figures quoted in this report come from the Museums Survey unless otherwise stated.

1.1 Breakdown of respondents

In total, 453 respondents completed the survey, representing 553 museums. This figure includes 482 Accredited or provisionally Accredited museums, 30 formally working towards Accreditation, 40 non-Accredited and one that did not give an answer. According to the official statistics for the Accreditation scheme for November 2016 there were 1,721 Accredited or provisionally Accredited museums in the UK at the time the survey took place.

Estimates suggest that the total number of museums in the UK is around 2,500, depending on how they are defined and counted. Therefore the survey's respondents represent 28% of all Accredited or provisionally Accredited museums and roughly 22% of the total number of museums. This is a healthy sample size that indicates that UK museums are well represented by the survey.

Responses to the survey were gathered from every part of the UK, and generally correspond with the distribution of museums across the UK. There is a slightly higher level of representation from Wales and from central and southern England, and a lower response rate from the north of England, Scotland and Northern Ireland (see Fig. 1.1).

The types of museum that responded are also broadly reflective of the make-up of the sector (see Fig. 1.2), with the highest response rates coming from the largest museum subsectors – independent museums and local authority museums – and good representation of most other museum types: university museums, military museums, English Heritage and National Trust properties, and 'other' museums. The response rate from national museums was slightly lower than proportional, and the survey has been supplemented with government data on national museums where relevant.

1 BACKGROUND TO THE SURVEY

Fig. 1.1
Geographic spread

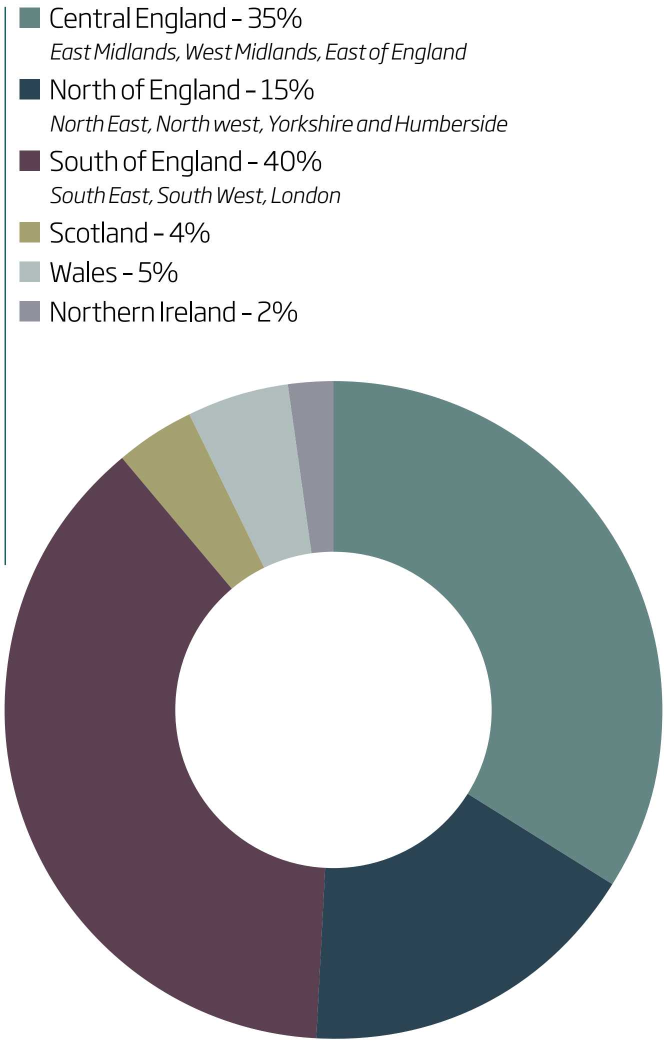
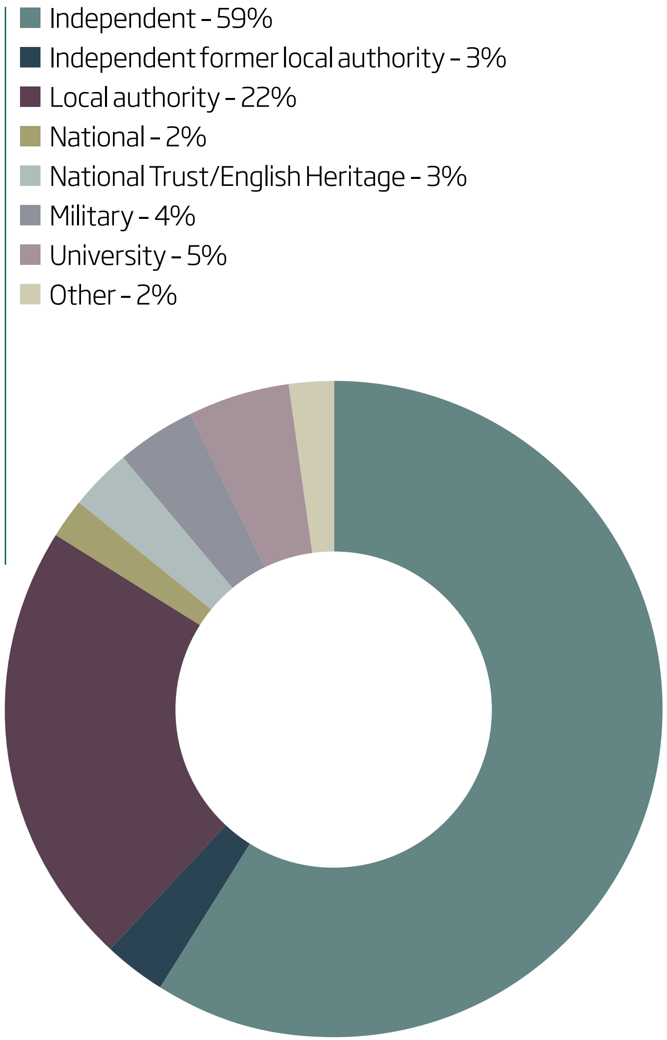


Fig. 1.2
Type of museum



2 MUSEUM OPERATIONS

2.1 Visitor figures

Respondents were asked to provide the total number of visits in person to their museum in 2015/16. On average, responding museums attracted a total of 92,954 visits in that time. When broken down further, the results show that local authority and independent former local authority museums attracted an average of 73,830 and 78,061 visits respectively.

Independent museums brought in an average of 37,253 visits, while military museums attracted an average of 34,140. University museums attracted the second highest number of visitors, recording an average of 115,511 visits that year, while national museums yielded the highest visitor figures, with an average of 1.64 million visitors (this figure omits some of the largest national museums and may not be fully representative of the performance of this subsector). The geographic spread of visitor figures is shown in Fig. 2.1.

In spite of substantial funding cuts, evidence gathered as part of longitudinal surveys such as Taking Part[2] by the Department for Culture, Media and Sport (DCMS) in England and the Scottish Household Survey[3] in Scotland have, over the past few years, indicated an upward trend in museum visits in many parts of the UK.

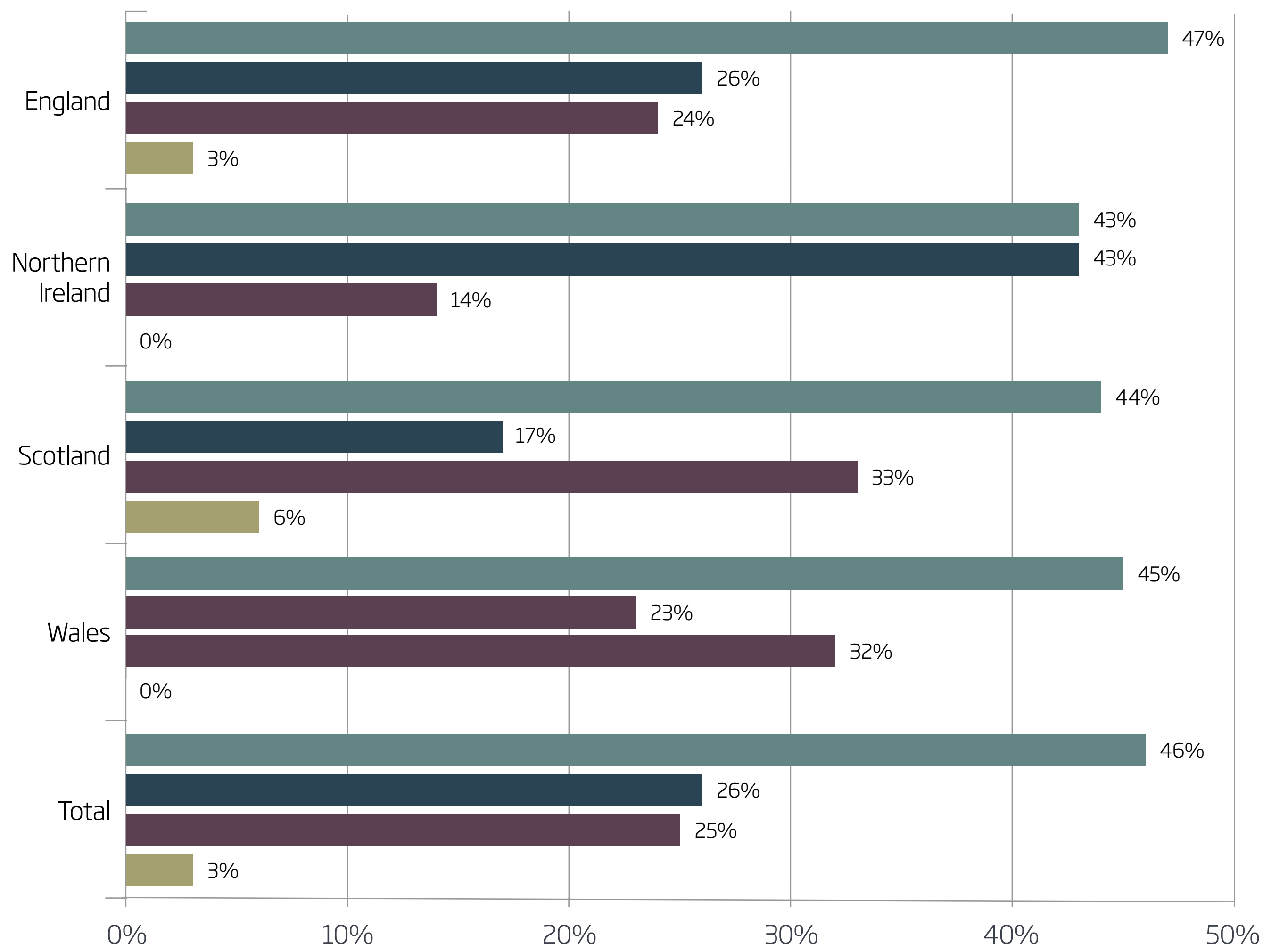
The results of our survey show that visitor numbers to UK museums remained robust in 2015/16: 46% of all respondents reported an increase in visitor numbers, with 26% saying their figures had stayed the same, and 25% of respondents reporting a fall in visitors.

[2]Taking part, DCMS (2016): www.gov.uk/government/statistics/taking-part-longitudinal-report-2016

[3]Scottish Household Survey, Scottish Government (2016): www.gov.scot/Publications/2016/09/7673

Fig. 2.1
Visitor numbers in 2015/16 compared to previous year

Increased
Stayed the same
Decreased
No answer

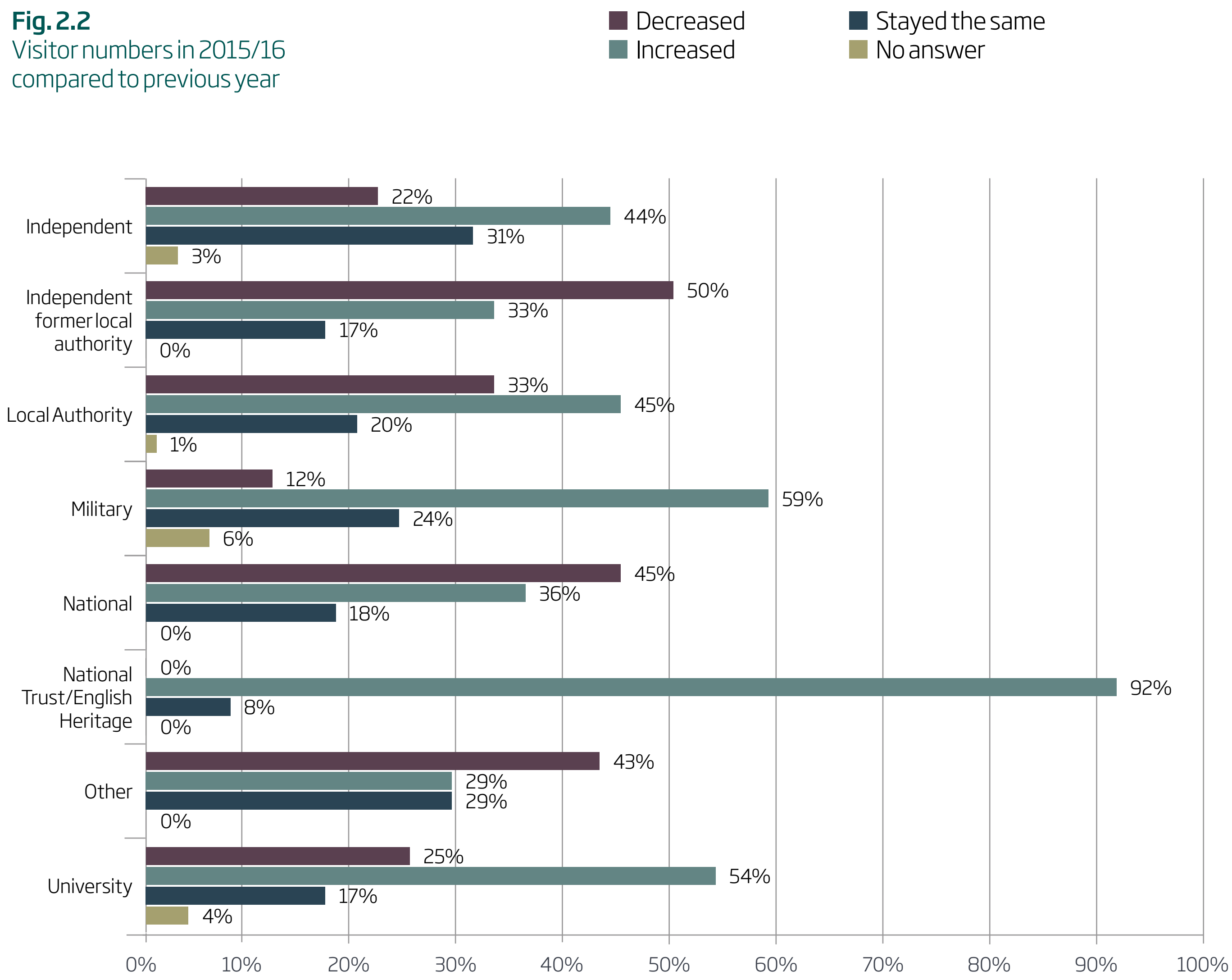


However, there is evidence that 2015/16 marked a slowdown in the growth of visitor numbers among some museums. Broken down into subsectors, a more varied picture emerges (see Fig. 2.2). Military and university museums showed some of the strongest growth, and almost half of independent museums saw an increase. The fortunes of local authority museums were mixed, with a third reporting a fall in visitors.

Half of independent former local authority museums said their visitor numbers had fallen, the highest proportion among the subsectors to report a decrease.

Among national museums, 46% reported a decrease in visitors. This is reflective of official government figures published by the Department for Culture, Media and Sport (DCMS) in England, which showed that sponsored national museums experienced a 3.1% decline in numbers in 2015/16. Some commentators have speculated that this is due to a drop in the number of blockbuster exhibitions compared to previous years, as well as increased public anxiety about security and terrorism.

Fig. 2.2
Visitor numbers in 2015/16 compared to previous year



However, this trend does not apply to national museums across all nations. National Museums Scotland (NMS) recorded its highest ever visitor figures (2.7m) in 2015/16, and National Museums Northern Ireland (NMNI) reported a 3.6% increase that year. Amgueddfa Cymru – National Museum Wales (NMW) reported a small decrease of 0.66%, partly due to the closure of one of its sites for refurbishment.[4]

Overall, in spite of some variations, the sector continues to perform well with the public: visitor numbers are either holding up or increasing at 72% of institutions. This would indicate that the public appetite for museums is not waning; instead, the fluctuation in numbers at various institution types appears to show that visitor decreases are more likely to be linked to museum- specific reasons rather than changing trends in public taste.

2.2 Governance

The survey found that a small number of responding museums had undergone changes in governance in the past year. Several respondents cited a move to charitable trust status confirming an ongoing trend among local authority museums to transfer operations outside council control. Findings elsewhere in this survey suggest that, while this does offer a museum greater independence and financial freedom, the benefits vary and it is not a panacea to funding cuts.

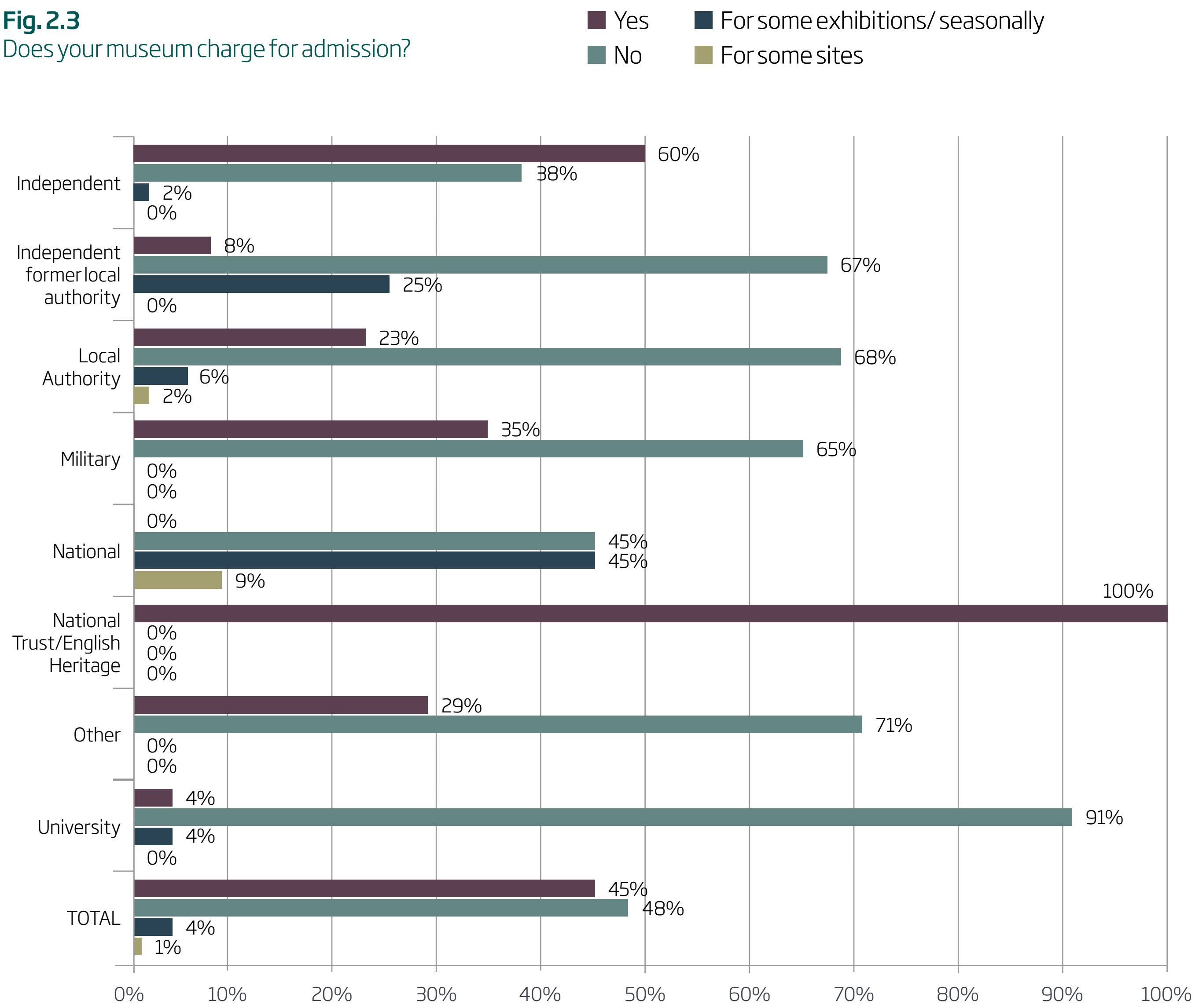
"[The museum] recently reopened after a transfer from local authority to charity-run. This presents both an opportunity and a challenge. A blank canvas for the 'new' museum to grow and a huge amount of local support. However, a huge decrease in funding is highlighting the importance of business thinking."

[4]All figures for national museums taken from statistics published by DCMS, NMS, NMNI and NMW for 2015/16

2.3 Admission charges

The survey found that the proportion of museums that charge or don't charge admission is broadly similar, with 45% charging, 48% offering free entry and 4% charging seasonally or for some exhibitions. Aside from National Trust and English Heritage properties, all of which said they charged admission, independent museums were the most likely to charge, followed by military museums. Just under a quarter of local authority museums said they had an admission charge.

Fig. 2.3
Does your museum charge for admission?



Among those that charge, the average cost of admission was £5.48 for an adult and £3.50 for a child. National Trust properties reported the highest average entry cost at £8.41, while university museums had the lowest at £0.75.

Funding cuts have obliged some museums to bring in admission charges, with a small percentage (2%) reporting that they had replaced free entry with an admission charge this year.

The benefits of charging admission versus offering free entry have been the subject of much debate in the museum sector. Admission fees are a valuable source of income for many museums, but this benefit can be outweighed by falls in visitor numbers. Comments from respondents, as well as recent research conducted by the Association of Independent Museums[5], indicate that the impact of charging admission can vary widely among museums according to their individual circumstances.

"Went free admission, doubled our visitor numbers and took in more in donations than admission fees without having to rely on any bridging loans to make up a shortfall."

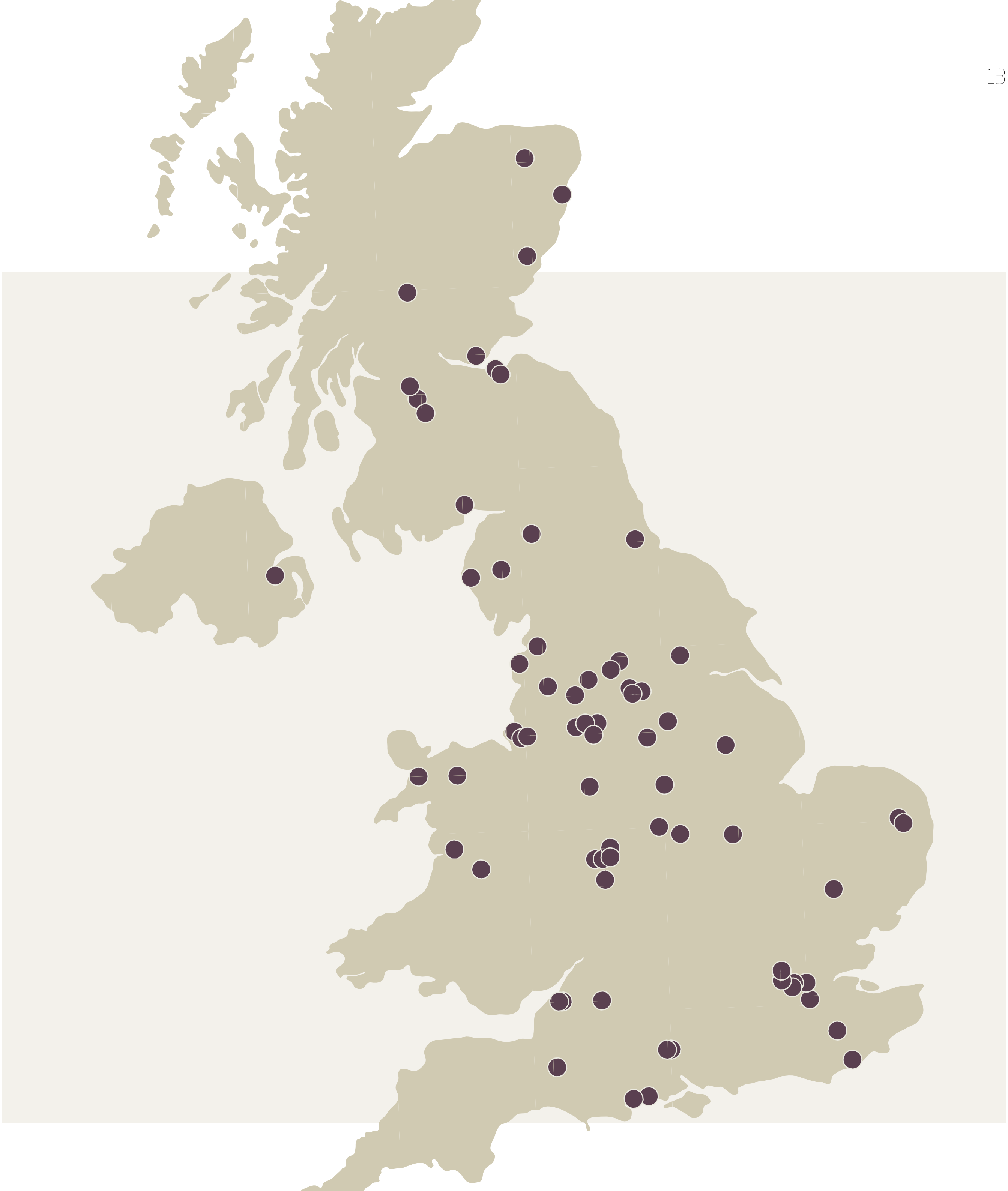
2.4 Renovations

In the current climate, it can sometimes be easier for museums to access capital funding than maintain core revenue. This trend is borne out by the survey, which shows museums are continuing to prioritise capital projects in order to refresh their offer and upgrade facilities: 34% of respondents said their museum had renovated or opened new galleries in 2015/16; 3% said their organisation had opened an entirely new museum. There is anecdotal evidence to suggest that funders, including some local authorities, are choosing to invest in capital projects in order to enhance the long-term sustainability and viability of museums, in the hope that they will become self-sustaining while their core funding is being reduced.

"We have attracted funding for a new, nationally unique exhibition and cemented our position as a significant heritage asset for the area."

[5] Evaluating the evidence: The impact of charging or not for admissions on museums, AIM (2016): www.aim-museums.co.uk/content/evaluating_the_evidence_the_impact_of_charging_or_not_for_admissions_on_museums/

2 MUSEUM OPERATIONS



2.5 Reduced onsite access

A small but significant proportion of respondents reported that they had been obliged to reduce access in 2015. Among all respondents, 7% said they had reduced opening hours and, as mentioned previously, 2% said they had introduced an admission charge.

Closures

The MA has mapped out museum closures in the UK from 2005 to the present. Our research shows that at least 76 museums have over that period, with 64 of those having closed since 2010. The majority of closures since 2010 are due to local authority cuts.

For more information see www.museumsassociation.org/campaigns/funding-cuts/19062013-museum-closures-map

3 FUNDING

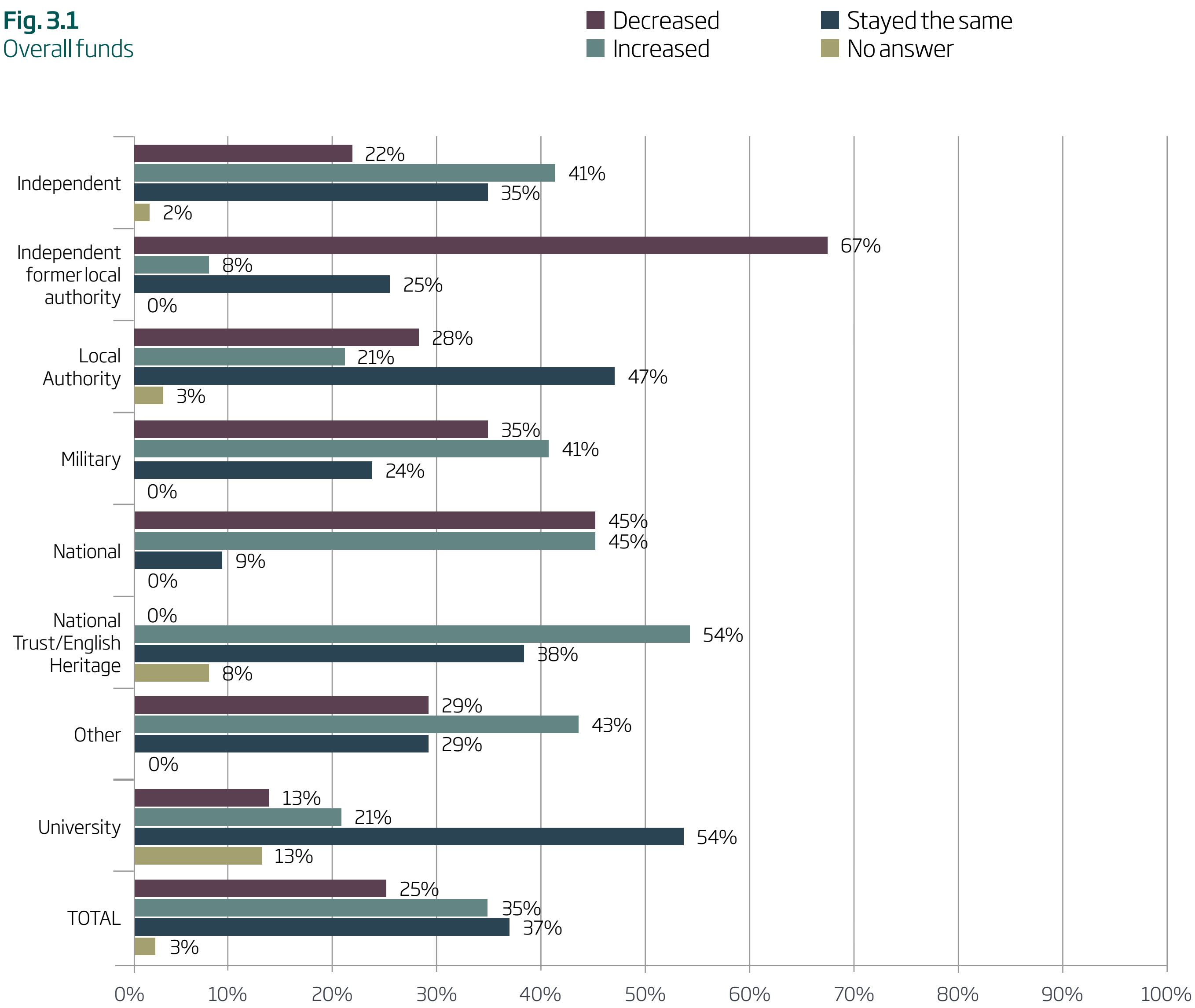
The museum sector faced another difficult funding year in 2015/16, although the survey also shows that some parts of the sector remain financially buoyant and progress has been made in terms of finding alternative funding streams.

3.1 Overall income

Asked whether their museum's overall income had decreased compared to the previous financial year, 25% of respondents said that it had, while 35% reported an increase in overall funds. However, there were substantial differences in the fortunes of various museum types (see Fig. 3.1). Independent former local authority museums were the hardest hit, while significant proportions of national and military museums were also affected by income loss. Almost one in three local authority museums saw a drop in overall income, although 21% said their income had risen.

The outlook was more stable for university museums, which were the lowest proportion of respondents to report a drop in income. Independent museums also gave a more positive picture, with more than two fifths saying their overall income had increased.

Fig. 3.1
Overall funds

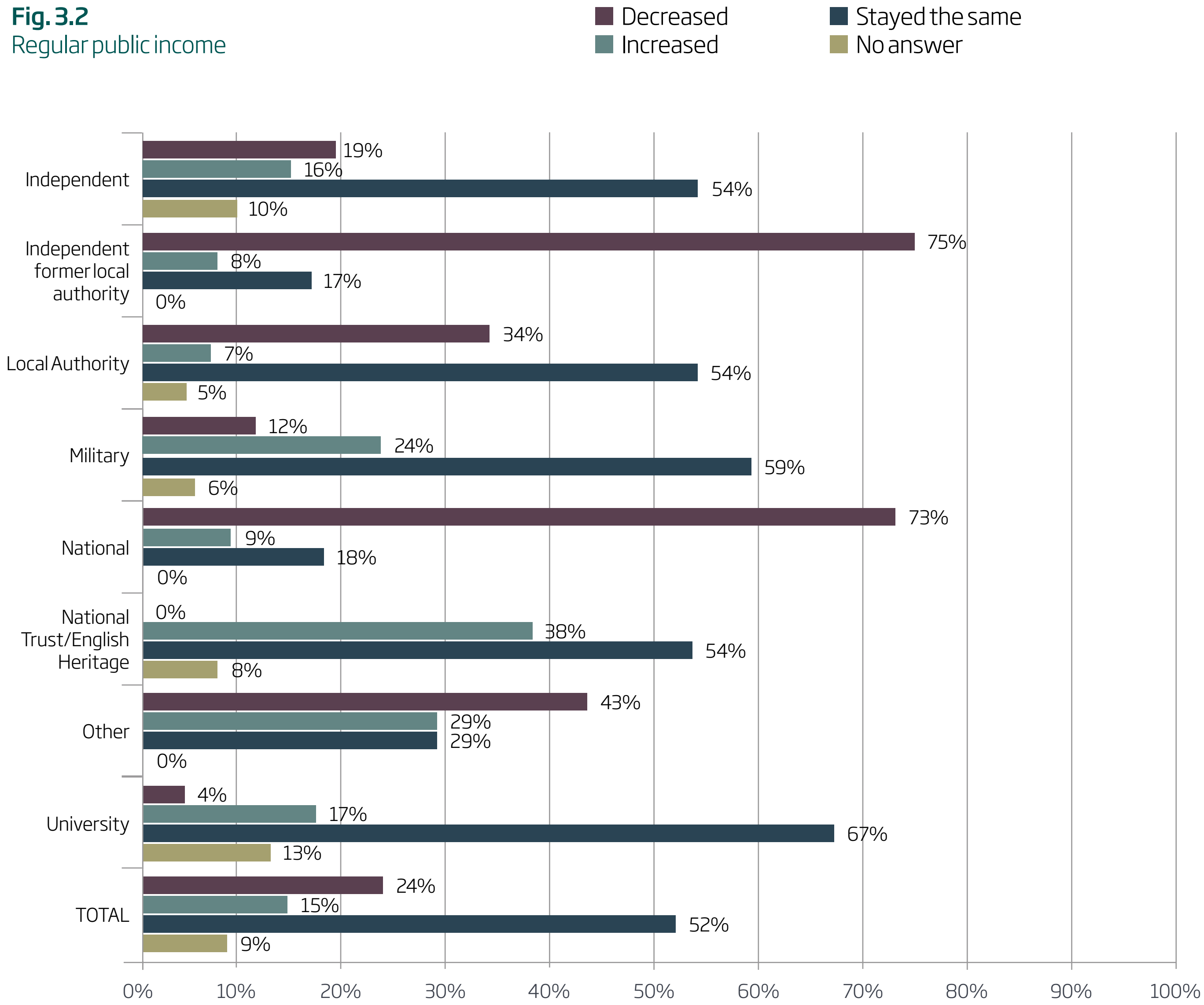


3.2 Public income

Respondents were asked to provide further detail about how their various sources of income had changed over the year 2015/16. The data gathered on regular public income (e.g. all revenue funding from sources such as government, local authority or higher education institution) shows that in total, almost a quarter of all respondents reported a decrease in public funding (Fig. 3.2).

Three quarters of former local authority museums reported a decrease, along with a similar proportion of nationals. Among local authority museums, just over a third experienced a cut to their public funding in their budget for 2015/16. University museums were the least likely museum type to report a cut.

Fig. 3.2
Regular public income

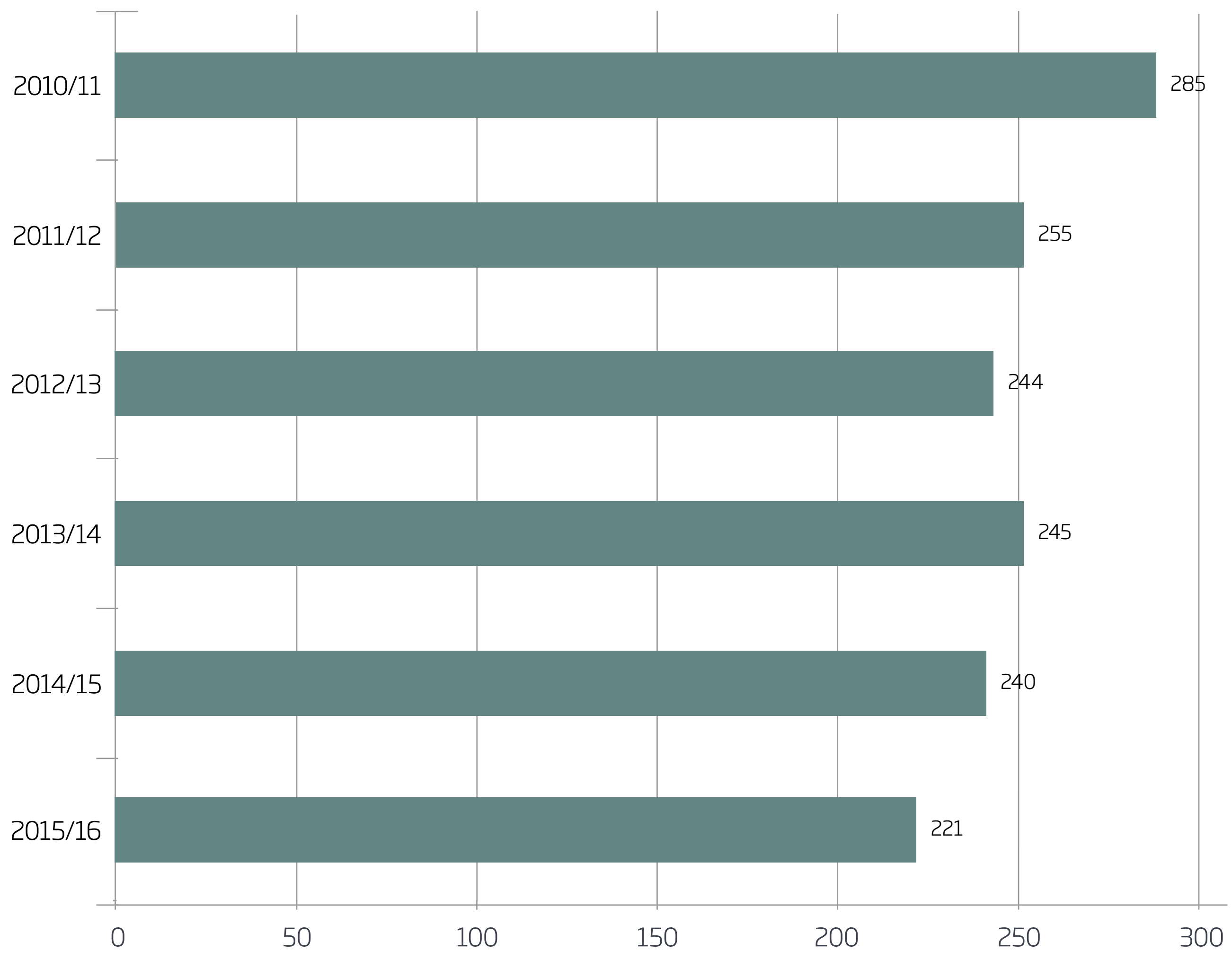


Local authority funding for museums
Separate data published by the Department for Communities and Local Government (DCLG) confirms the decline in local authority funding for museums and galleries in England, showing that spending has fallen from £285m per year in 2010/11 to £221m in 2015/16. Adjusted for inflation, this represents a 31% real-terms decrease between 2010 and 2016.

Although a similarly detailed breakdown was not available for local government spending in the devolved nations, more general figures show that, over the same period, local authority revenue spending on culture, heritage, libraries and leisure services in Wales fell by 26% in real terms, while funding for cultural and related services among Scottish local authorities decreased by 4.6% in real terms (equivalent data for Northern Ireland was not available).[6]

[6]Data taken from: www.gov.uk/government/statistics/local-authority-revenue-expenditure-and-financing-england-2015-to-2016-final-outturn; statswales.gov.wales/Catalogue/Local-Government/Finance; www.audit-scotland.gov.uk/spending-across-service-areas-by-councils

Fig. 3.3
Annual Local Government Spending on Museums (England)



The geographic spread of public funding cuts is also revealing (Fig. 3.4). The data shows that museums in the devolved nations were hit hardest by public funding cuts in 2015/16. In Wales, 64% of museums reported a cut to public income, as did half of respondents in Scotland and 43% of those in Northern Ireland. English museums appear to have slightly fared better, with just over a fifth reporting a decrease. Within England, London and the North East experienced the greatest drops in public income, with 30% of museums in each of those regions experiencing a cut.

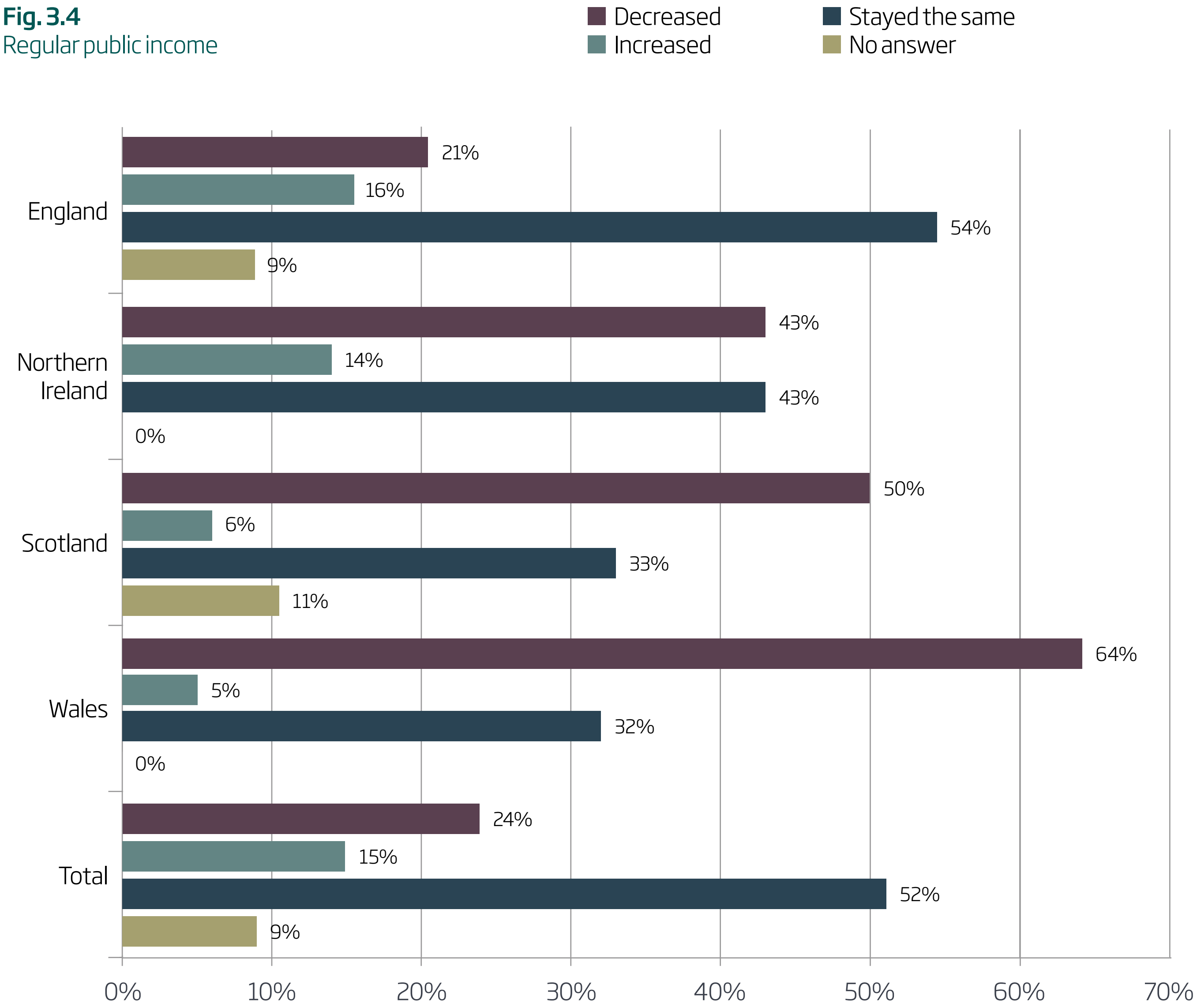
With a further round of spending cuts now underway in England, the relatively lower percentage of cuts there in 2015/16 is likely to be indicative of a brief pause rather than a change in spending policy. In addition, new challenges - such as local authorities assuming responsibility for business rate relief in England and Wales - could add further pressure to public funding for museums.

"Continuing reduced funding from the local authority remains a constant challenge."

"We have to reduce our deficit by £10,000 by the end of the year, and another £10,000 every year over the next three years. Our options are make staff redundant, increase our charges across all activities, cut costs, reduce our free events. It will be a combination of all of these factors."

"We fear the loss of rate relief which would be a nail in our coffin."

Fig. 3.4
Regular public income



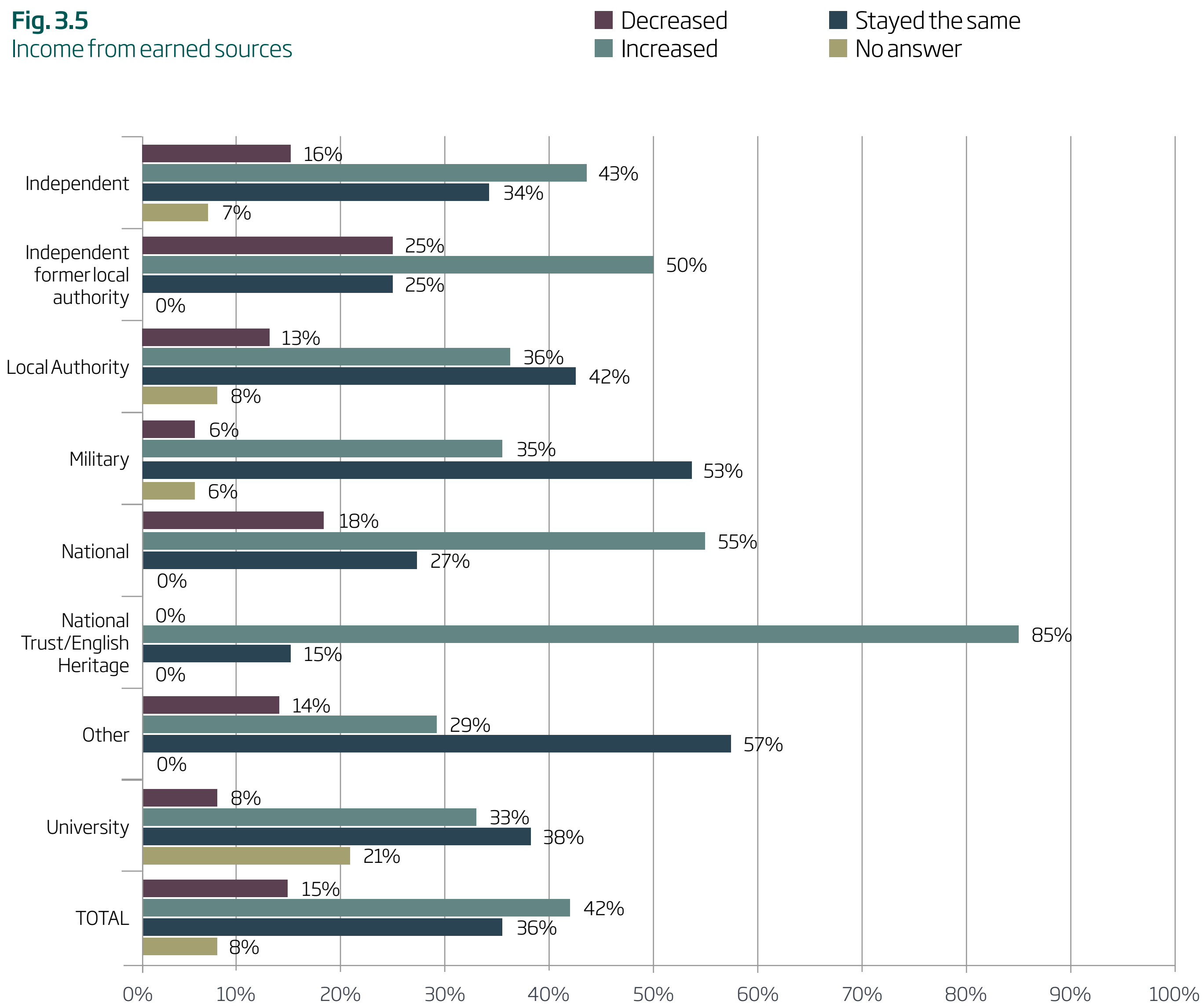
3.3 Self-generated income

As public funding has fallen, museums have taken significant measures to diversify their funding streams in recent years, focusing on maximising self-generated income through commercial activities such as shops, cafes and events.

The results of the survey show positive signs that progress is being made in terms of self-generated income, with more museums reporting an increase than those that saw a decrease (see Fig. 3.5). The highest proportion of respondents to report growth in earned income were national museums (55%).

Among independent former local authority museums, 50% had seen growth in this area – however, in spite of this success, the aforementioned data on overall income show that many museums in this category may not yet be earning enough themselves to make up for the shortfall in public funding. Former local authority museums were also the most likely to report a decline, with 25% saying their earned income had fallen. Independent museums had a relatively good year, with 43% reporting an increase in earned income. More than a third of local authority museums also reported an increase.

Fig. 3.5
Income from earned sources



The results were also broadly similar across geographic area, although a higher proportion of museums in Wales (36%) reported a fall in earned income, which may indicate a more challenging environment for commercial activities among Welsh museums.

"We took the running of the museum cafe in-house (previously a franchise) and built it up from a very limited service with limited opening hours to a fully-fledged museum cafe with seasonally changing menus... Apart from museum visitors, we now attract cafe regulars."

"Although our short-term funding gap has been addressed, in the medium term [we] need to secure running costs."
(Independent former local authority museum)

3.4 Grants, donations and philanthropic giving

Museums have greatly stepped up their fundraising efforts across the country over the past few years. However the MA's previous Cuts Surveys and research undertaken by other cultural stakeholders[7] have shown wide disparities in the ability of museums to access funding from individual donors, grant-giving bodies and philanthropic sources.

Fundraising, particularly through philanthropy, has been challenging for those outside London and other large urban cities; according to in-depth studies such as the recent Going Public report by Museums Sheffield[8], while there is much room for museums to improve this aspect of their fundraising, it is unrealistic to expect that private giving can act as a substitute for public funding.

Meanwhile, competition for grants has also greatly increased in recent years as museums and other eligible organisations increase their fundraising efforts.

The results of our survey offer a largely positive picture regarding this area of income. In total, 37% of museums increased their income from grants, donations and philanthropy, while 15% recorded a drop in income (see Fig. 3.5). A higher proportion of university museums and local authority museums saw growth in this area, while independent museums fell just below the average. However, national museums were the most likely to report a decrease in this type of funding (27%), closely followed by military museums (24%).

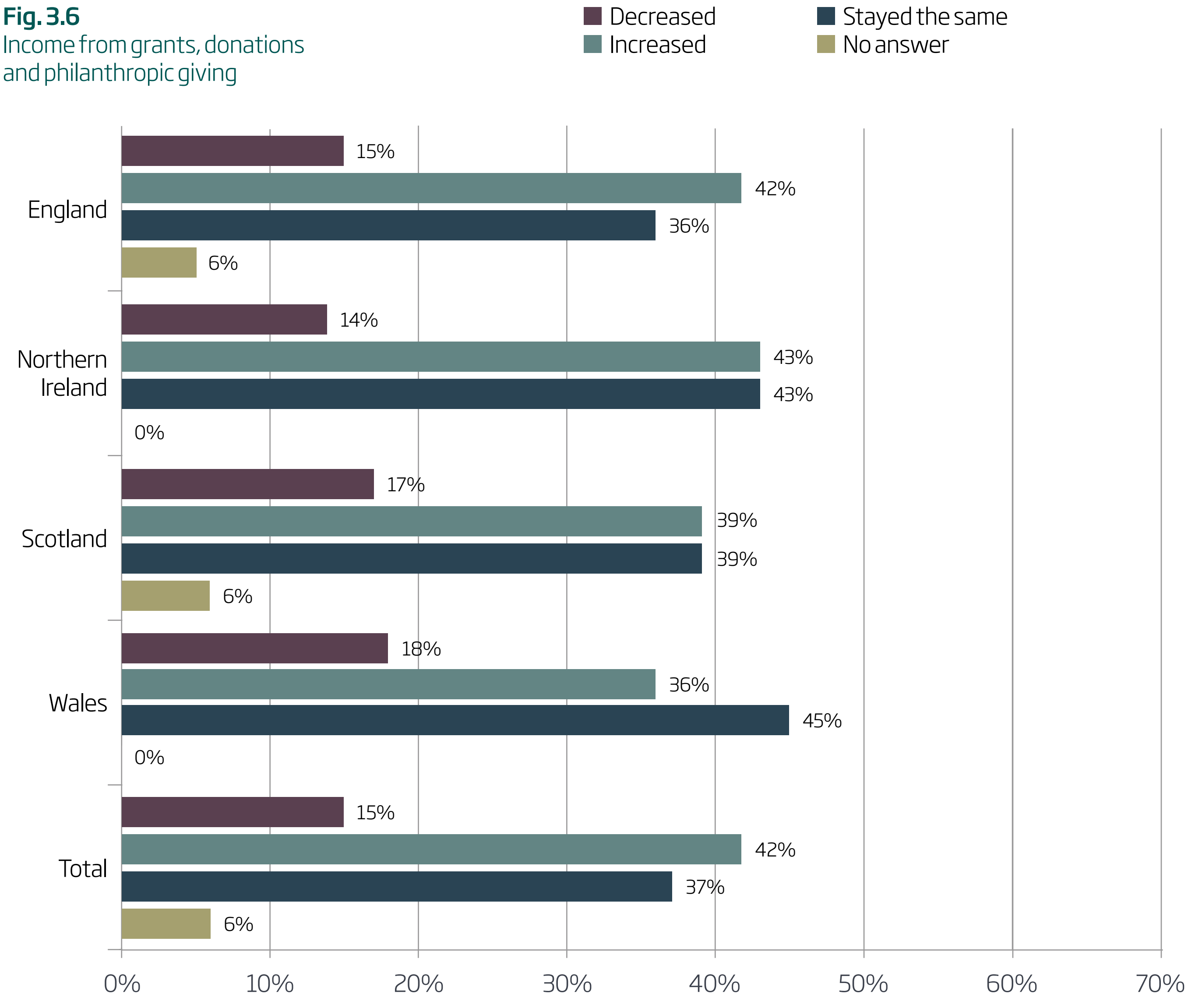
In terms of geographical spread, some of the highest increases were reported in areas that have struggled in the past to raise income from these sources. Museums in Wales, North East England, Yorkshire and Northern Ireland reported increases in above-average proportions. Meanwhile those in London and the West Midlands fell furthest below the average.

The reasons for this disparity are unclear; it may be that museums in the latter areas experienced growth more quickly in previous years and have now seen their potential earnings from fundraising reach a plateau, or it may be that efforts by some grant-givers to address previous regional imbalances are slowly having an impact.

[7] Private Investment in Culture Survey (2016), Arts Council England (ACE): www.artscouncil.org.uk/news/arts-council-england-publishes-data-donations-and-sponsorship

[8] Going Public: International Art Collectors in Sheffield (2016), Buckley, L: www.museums-sheffield.org.uk/assets/PDFs/Going%20Public%20-%20The%20Report%20by%20Louisa%20Buck.pdf

Fig. 3.6
Income from grants, donations and philanthropic giving



4 WORKFORCE

As the MA's past surveys have shown, the museum workforce has experienced substantial upheaval in the past seven years. Cuts have had a serious impact on some areas of the workforce; many experienced staff have been forced to leave the sector, leading to a loss of specialist expertise and skills. Respondents to the survey reported low morale and stress as being widespread, as well as increasing frustration at low levels of pay in the sector.

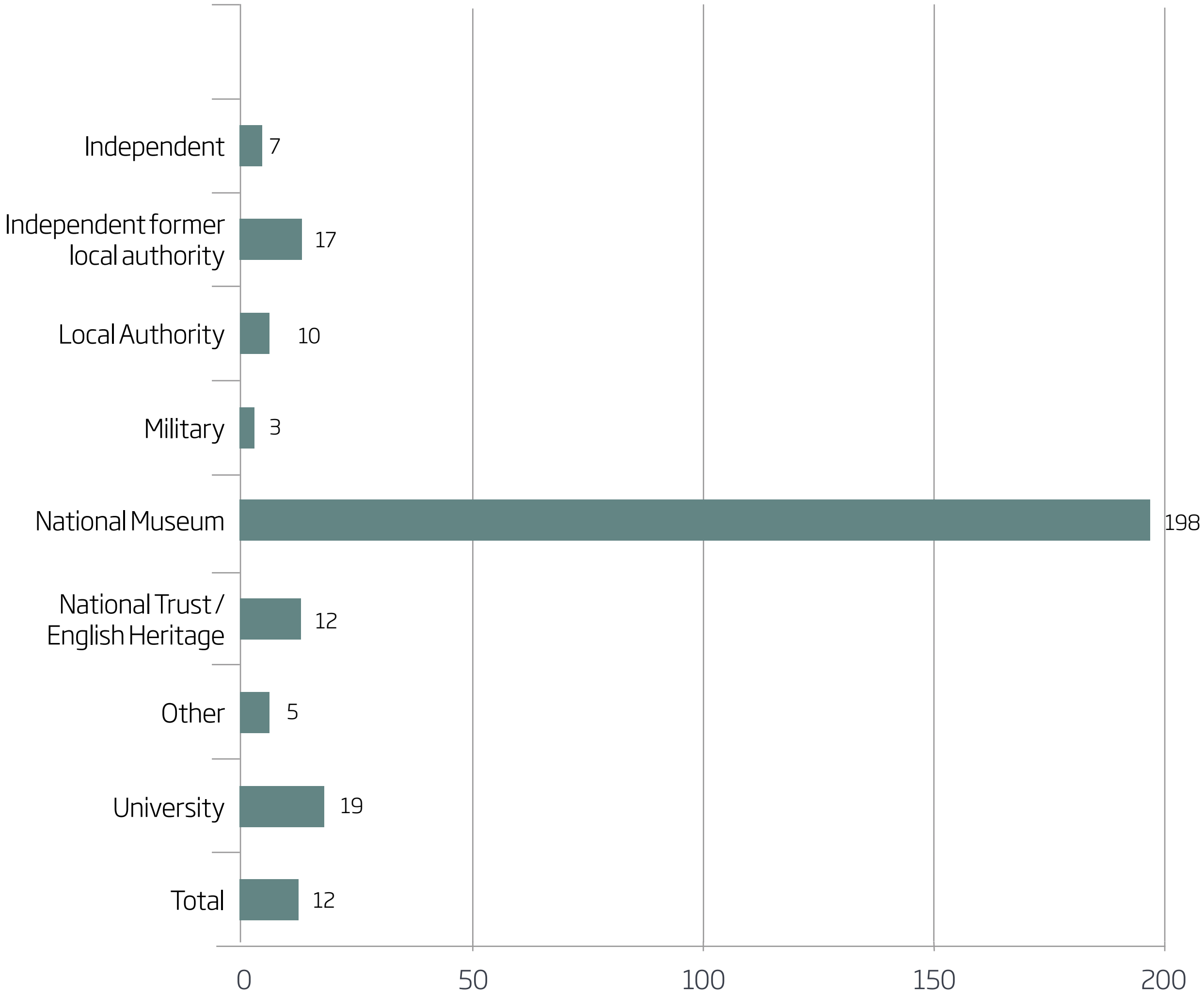
"Key threats are retention and loss of key staff through benchmarked lower rates of pay compared to wider sector."

"Current problems: insufficient staff and therefore stressful."

4.1 Paid staff

Museums responding to the survey said they employed an average of 12 full time equivalent (FTE) staff in 2015/16, rising to 17 with the inclusion of casual and seasonal staff. Clearly there is much variation between different types of museum; national museums said they employed an average of 198 FTE staff, compared to 10 at local authority museums and seven at independent museums.

Fig. 4.1
Average number of FTE paid staff in 2015/16



Asked to compare the number of FTE staff to the previous year, 15% of museums said FTE staff had decreased, while the same proportion reported an increase (see Fig. 4.2). However, the results varied widely between museum types. The hardest hit by staff cuts were independent former local authority museums (58%), national museums (55%) and local authority museums (26%). These figures reveal an ongoing difficult situation for staff at institutions that are more likely to be reliant on public funding, where high fixed costs mean that staffing budgets are often first in line for cuts.

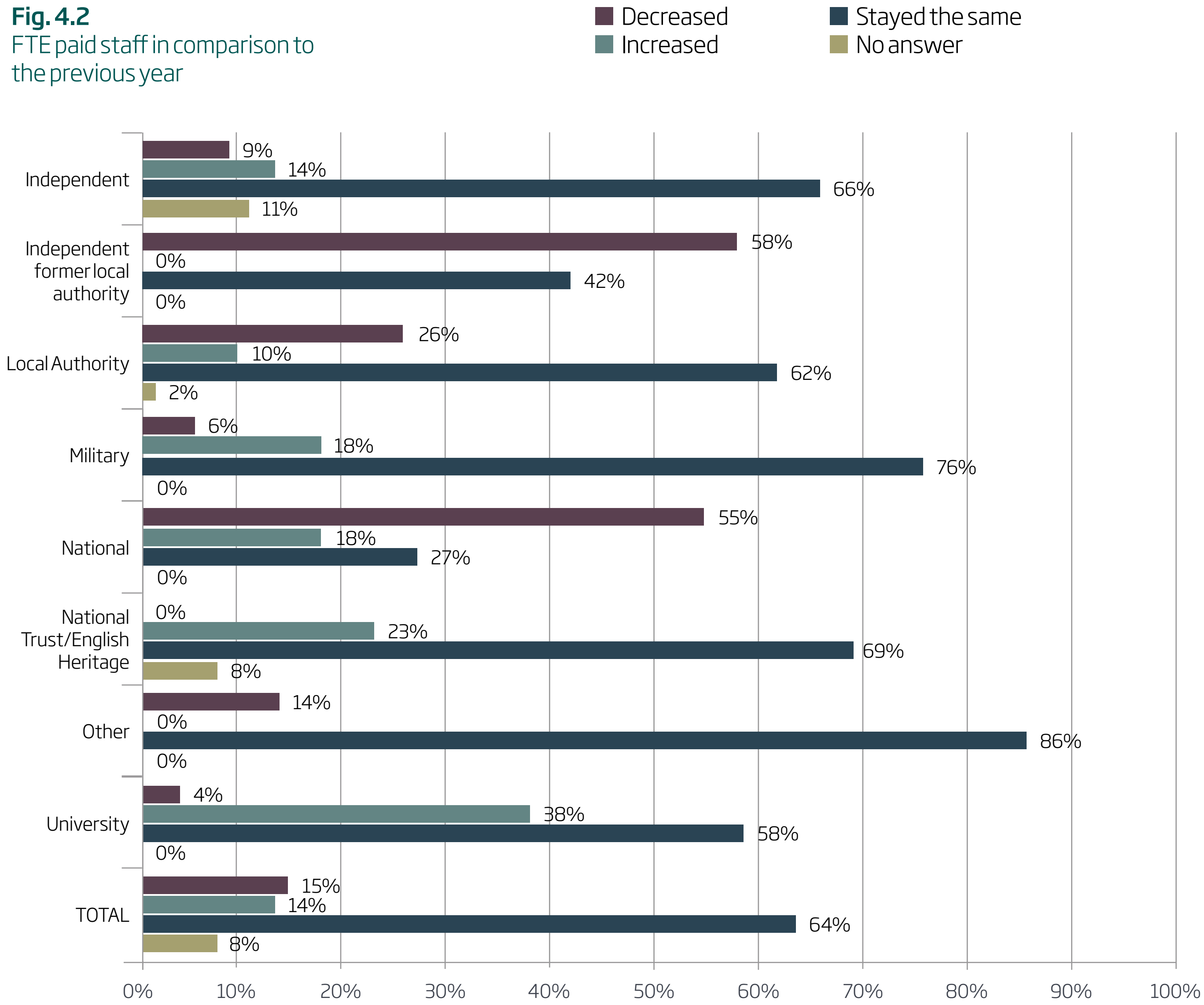
"2015/16 has seen another severe reduction in staffing levels. Reductions have affected front- and back-of-house functions."

The geographic spread of staff cuts is also revealing. Wales had the highest proportion of museums (36%) saying FTE staff had decreased, with the West Midlands and Northern Ireland (both 29%) also reporting staff cuts in higher than average numbers. At the other end of the scale, museums in London (35%), the South East (24%) and Yorkshire (33%) all reported increased staff in higher than average proportions.

4.2 Volunteers

Museums reported an average of 57 volunteers in 2015/16 (a figure that includes trustees). Local authority museums reported a lower-than-average number of volunteers (33), while independents and former local authority museums had almost double that number, with an average of 60 and 61 volunteers respectively. National museums and National Trust properties reported significantly higher-than-average numbers, at 137 and 180 respectively. Across all categories, volunteers contributed an average of 4,733 hours per museum in 2015/16.

Fig. 4.2
FTE paid staff in comparison to the previous year



These figures confirm that the independent museum sector relies significantly more on volunteers than local authority, university or military museums. The ratio of volunteers to FTE staff is much greater at independent museums (an average of 60:7) than at local authority museums (33:10), even though visitor figures show that local authority museums are, on average, significantly larger in size.

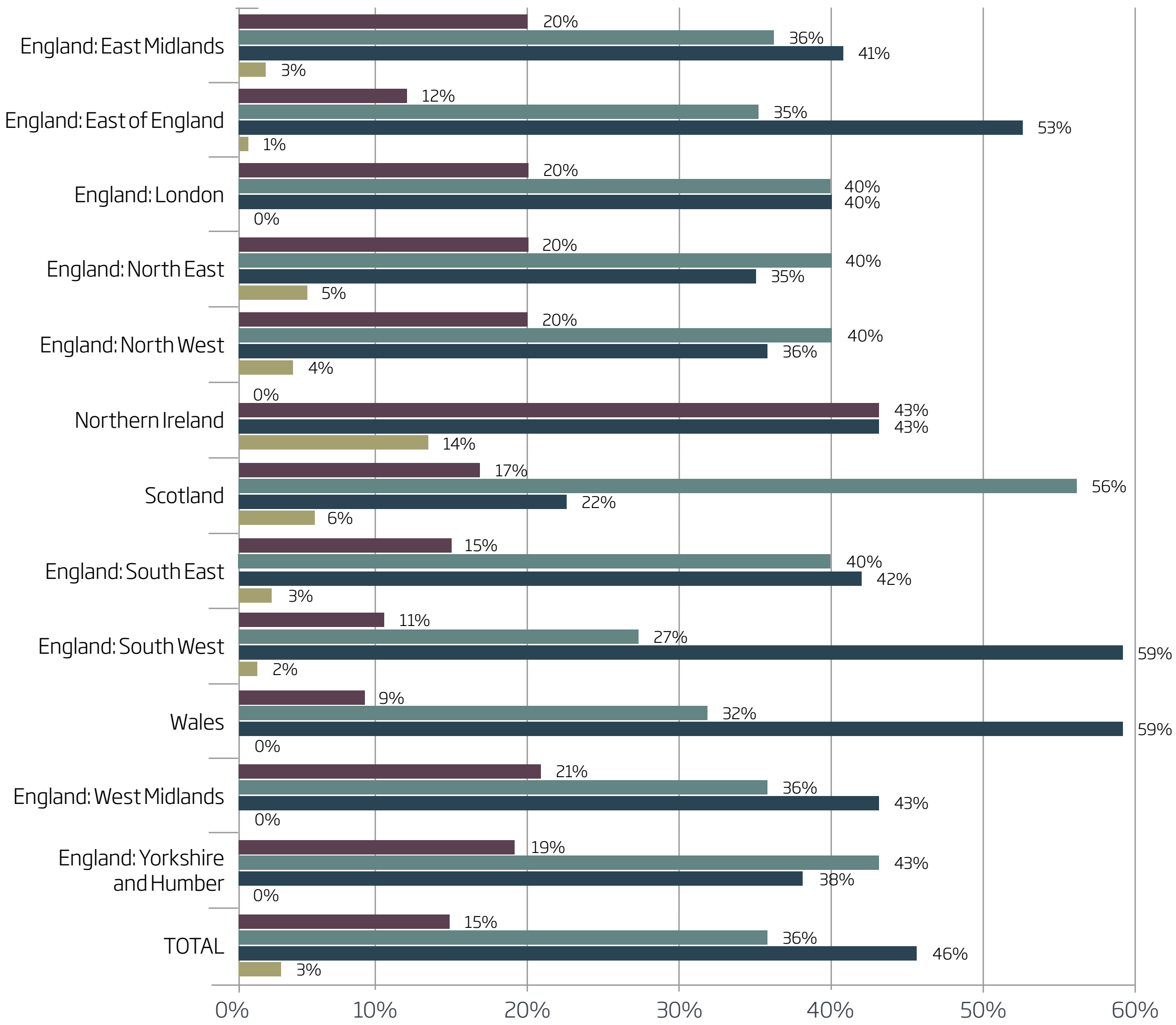
"Feedback from visitors often refers to 'helpful and knowledgeable' volunteers; this is particularly pleasing."

"The support from the local community and especially volunteers to make the redevelopment project happen has been inspiring. Particularly the volunteer power to move the contents of an entire museum!"

Meanwhile, the number of volunteers increased at 46% of museums in total in 2015/16. This figure was broadly similar across all organisation types, apart from independent former local authority museums, where only a quarter reported an increase. In terms of geographical spread, well over half of museums in Wales and South West England (see Fig. 4.3) reported an increase, while Scottish museums increased volunteer numbers in lower than average proportions.

"During the last 12 months the number of museum volunteers has more than doubled."

Fig. 4.3
Volunteers in comparison to previous year



4 WORKFORCE

Volunteers play a critical role in the sector, and an increase in their numbers is to be welcomed. However the MA is aware of cases in which volunteers have been used to replace paid staff, or recruited for roles that have a high level of experience and responsibility; such practices can be exploitative and may also depress wages in the wider workforce. The results of this survey show that this is an ongoing issue in some parts of the sector, revealing a correlation between loss of public funding and paid staff, and a rise in volunteers. For example, museums in Wales were the highest proportion to report both a loss of public income (64%) and FTE staff (36%), as well as an increase in volunteers (59%).

In addition, as museums increasingly come to rely on volunteers, they are finding that they are faced with a shortage of skills and knowledge required for some areas of museum activity. Some volunteer-run institutions reported difficulties in finding candidates with the right level of skills, experience and commitment/availability required for some key museum roles.

"We are a museum run entirely by volunteers and getting people to step up to management is proving difficult."

"Ongoing recruitment of volunteers to run the museum on a professional basis is always a challenge."

5 PUBLIC-FACING SERVICES

Museums appear to have had a generally positive year in terms of the public activities they provide, in spite of the financial climate, with many reporting success in increasing participation, engagement with audiences, and an improvement in their profile and the benefits they offer the public.

"121% increase in participation in our public events; 94% increase in number of students we've worked with; 137% increase in visitor numbers."

"We have greatly strengthened our relationships with other potential partners and organisations in order to share skills and develop plans of benefit to our wider communities."

5.1 Education

Education sessions

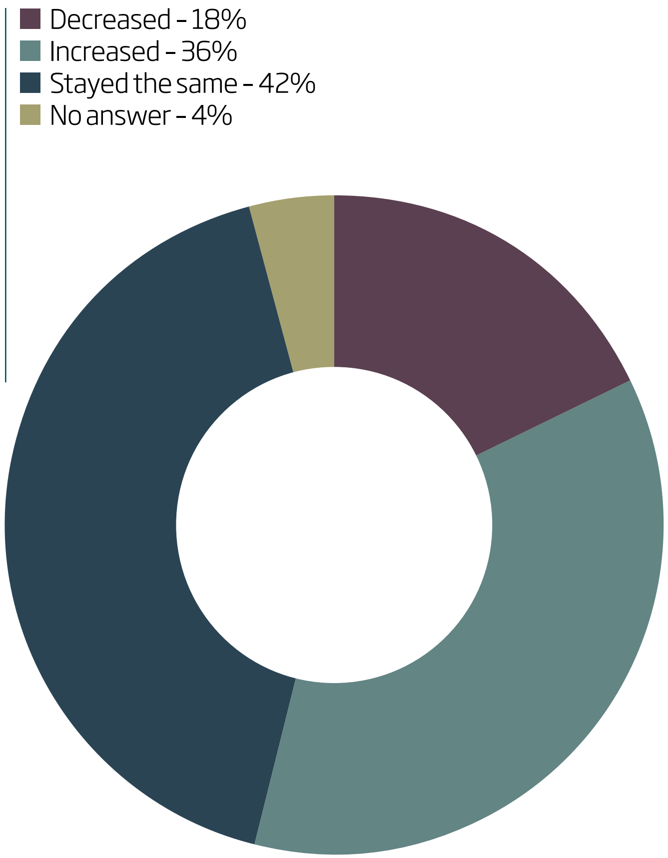
Education remains a key plank of museum work. Our survey shows that respondents engaged with an average total of 42 schools and other formal learning organisations in 2015/16. They delivered an average of 82 education sessions on-site for formal education providers, including schools, colleges and higher education institutions. An average of 2,632 participants engaged in those sessions.

Offsite, museums delivered an average of 19 sessions each for formal education providers in 2015/16 (the figure includes services such as museum loan boxes etc.). These sessions engaged an average of 1,070 participants.

School visits

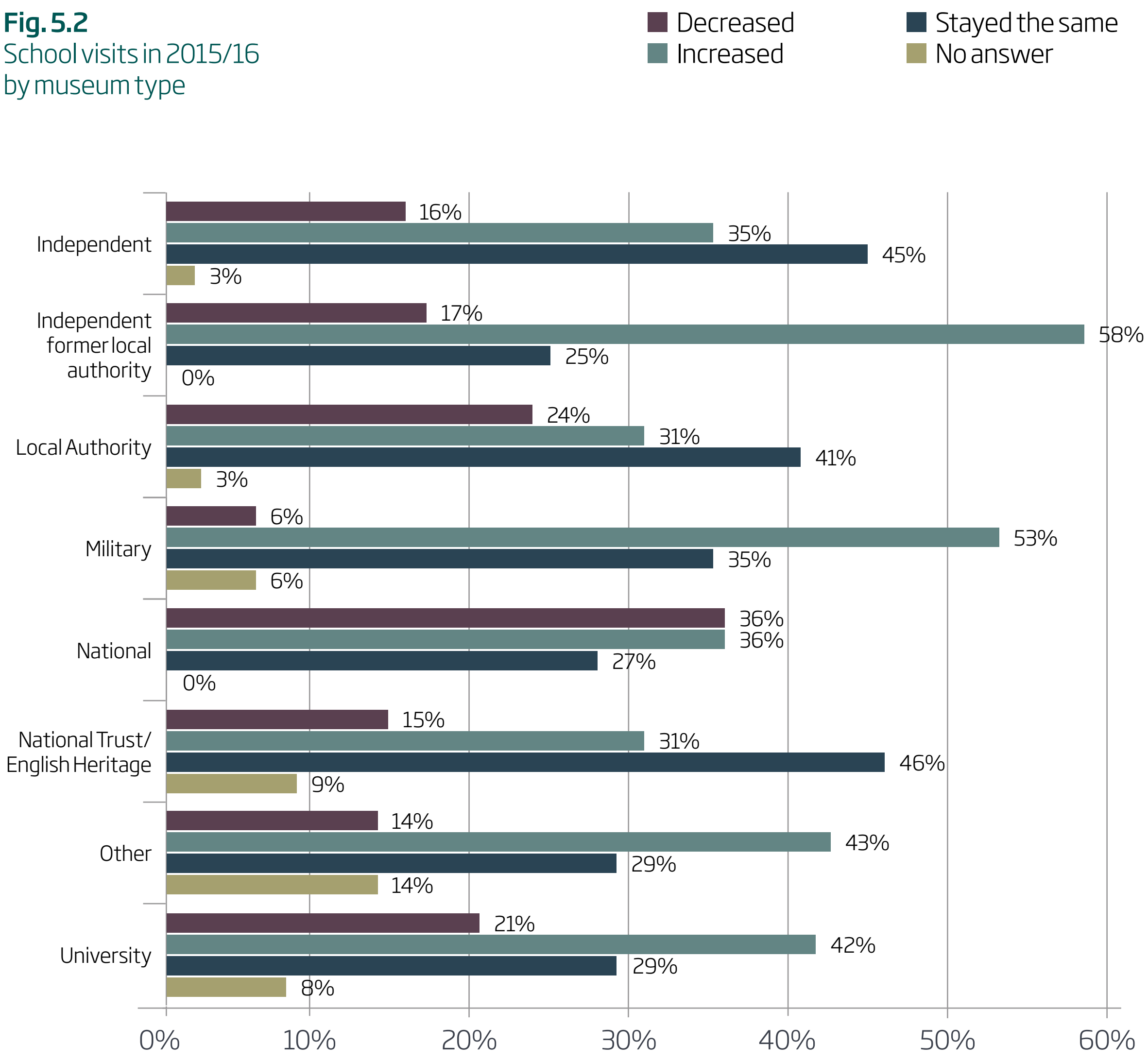
Recent evidence published by other stakeholders has shown a fall in school visits to certain types of museums, a phenomenon partly attributed to changes to the school curriculum, particularly in England, as well as the loss of museum education services due to funding cuts. This picture is partially borne out here, with nearly a fifth of respondents (18%) reporting a decrease in school visits, although, more positively, a further 36% of museums said school visits had increased in 2015/16.

Fig. 5.1
School visits in 2015/15



Among museum subsectors, the highest proportion to report a decrease in school visits were national museums (36%), followed by local authority museums (24%) and independent museums (17%). Performance indicators released by the DCMS for sponsored national museums in England showed a 3.1% fall in the total number of educational visits made in 2015/16[9]. Taken together, these results may indicate a downward trend in the level of engagement between schools and some types of museums.

Fig. 5.2
School visits in 2015/16 by museum type



[9]Sponsored museums performance indicators, DCMS (2016): www.gov.uk/government/publications/sponsored-museums-annual-performance-indicators-2015-16/sponsored-museums-performance-indicators-201516

5.2 Targeted projects

A particular focus of the MA in recent years has been its Museums Change Lives campaign[10], which encourages museums to develop socially engaged practice, and to become increasingly active working with the communities they serve. In order to assess the current level of take-up among museums regarding this type of practice, respondents were asked if they had done specific projects or work, such as outreach sessions, object collecting or audience engagement, with various external stakeholders.

A large majority of museums worked with friends organisations, local community groups and schools. Projects with health and wellbeing providers were also well-represented among respondents, while almost a quarter of museums had undertaken targeted projects with black, Asian and minority ethnic (BAME) communities. At the lower end of the scale, fewer museums reported working specifically with disability, LGBTQ+, environmental and gender equality groups.

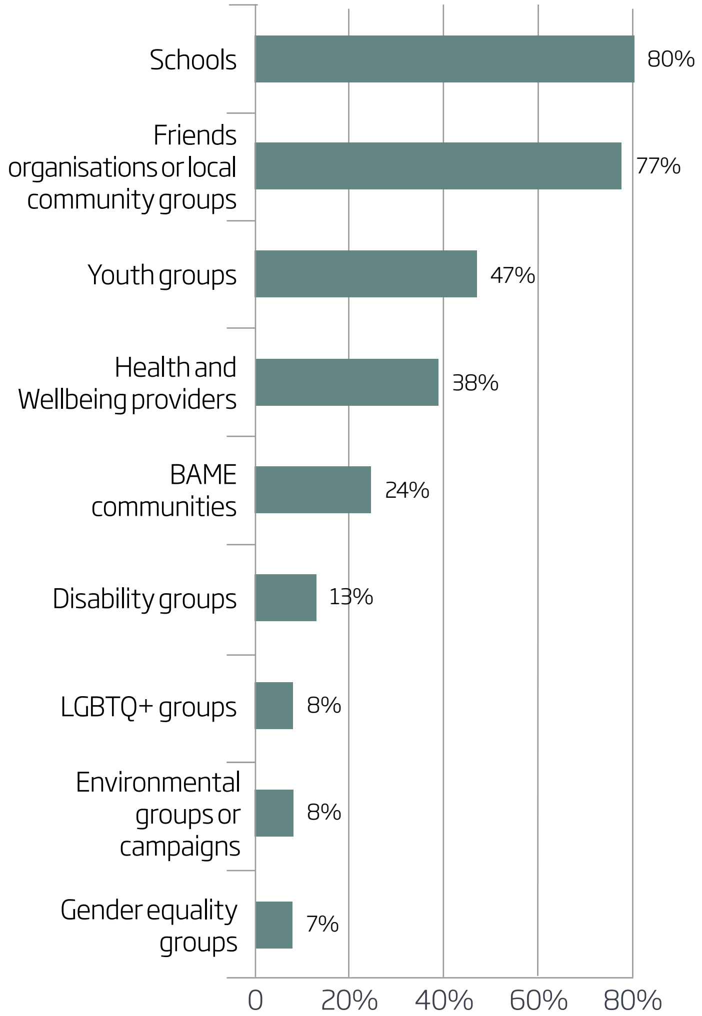
Other targeted projects specified by respondents themselves included work with homeless groups, refugee support organisations, Gypsy, Roma and Traveller communities and military groups. It is clear that museums are engaging in specific projects with a large and varied number of groups and communities, but there is still much room to grow and diversify this type of practice within the sector.

"Working with Syrian Refugees to contextualise Somerset's 100-year history of providing refuge to those escaping war."

"Completion of Varda project working with local young Gypsy travellers to record and raise awareness of their heritage."

"Our project aims to reduce social inequality for those in the greatest need by bringing communities together to share their past and present… and to build new skills, greater confidence and creative outlets for those who lack such opportunities."

Fig. 5.3
Specific projects or work with the following stakeholders

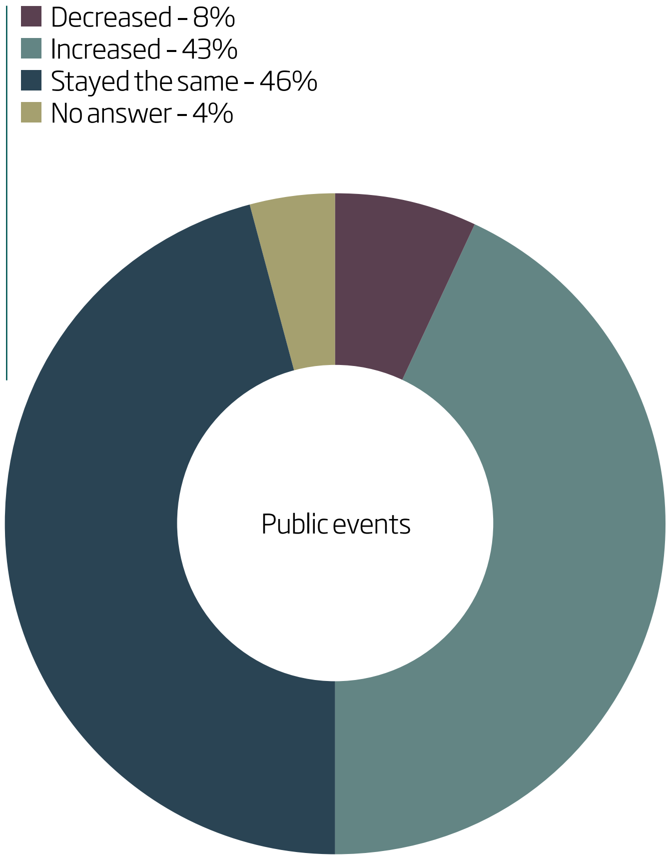


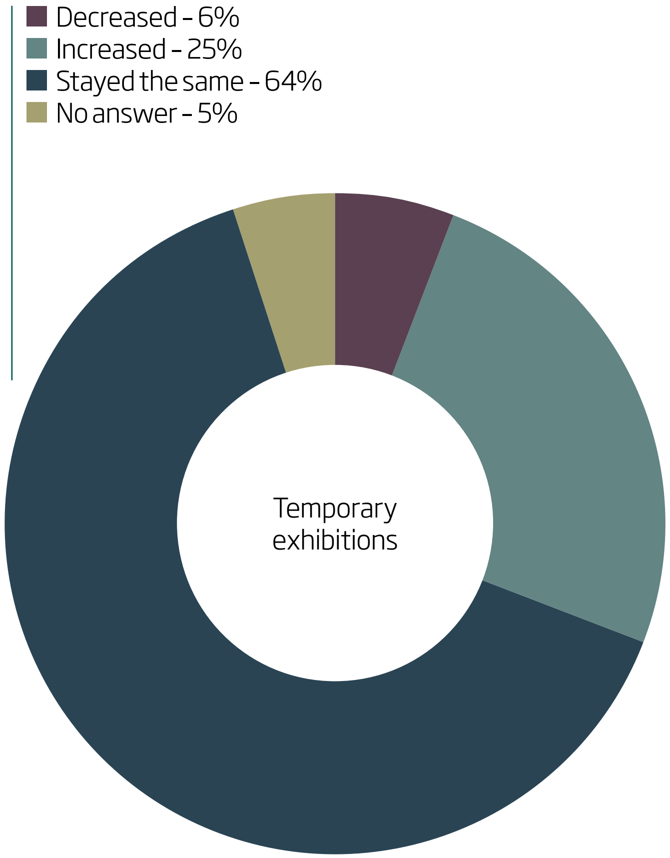
[10]Museums Change Lives, MA (2013): www.museumsassociation.org/download?id=1001738

5.3 Public events and temporary exhibitions

Previous research has shown that, in spite of funding cuts, museums have prioritised these services over other areas. Our survey shows that this continues to hold true. Just 8% of museums reported a decrease in public events in 2015/16, with 43% saying their public events had increased – a figure that remains broadly similar across various museum types. Likewise, just 6% of museums reported a drop in temporary exhibitions. The vast majority maintained the same number of temporary exhibitions, while a quarter reported an increase. It is clear that museums are continuing to invest in these areas in order to maintain a frontline presence with the public.

Fig. 5.4
Total increase/decrease in public events and exhibitions





5.5 Digital outreach

Online presence is an increasingly important element of public-facing museum work. However, almost one in 10 respondents to the survey said their museum did not have its own website. When broken down by type, this percentage rises to 18% of local authority museums and 17% of independent former local authority museums (see Fig. 5.5).

Museums have reported struggling to gain online control and identity from their governing local authorities[11], which often integrate them as a single page on a much larger council website. This can diminish the profile of the museum, making it difficult to find online and preventing it from promoting the full extent of its services, as well as offering digital access to its collections.

A similar proportion of respondents (11%) said their museum did not use social media to engage with audiences (see Fig. 5.6). However, when broken down by type the results show that local authority-connected institutions are, in fact, better represented in this area and it is other types of museums that are making less use of social media. Notably, almost a quarter of military museums and 16% of independent museums said they did not use social media.

"Our social media audiences have grown by 25% as well as our outreach and school pupil engagement figures growing."

[11]Councils urged to give museums more freedom online: www.museumsassociation.org/museums-journal/news/19102016-councils-urged-to-give-museums-freedom-online

Fig. 5.5
Museums that do not have their own websites

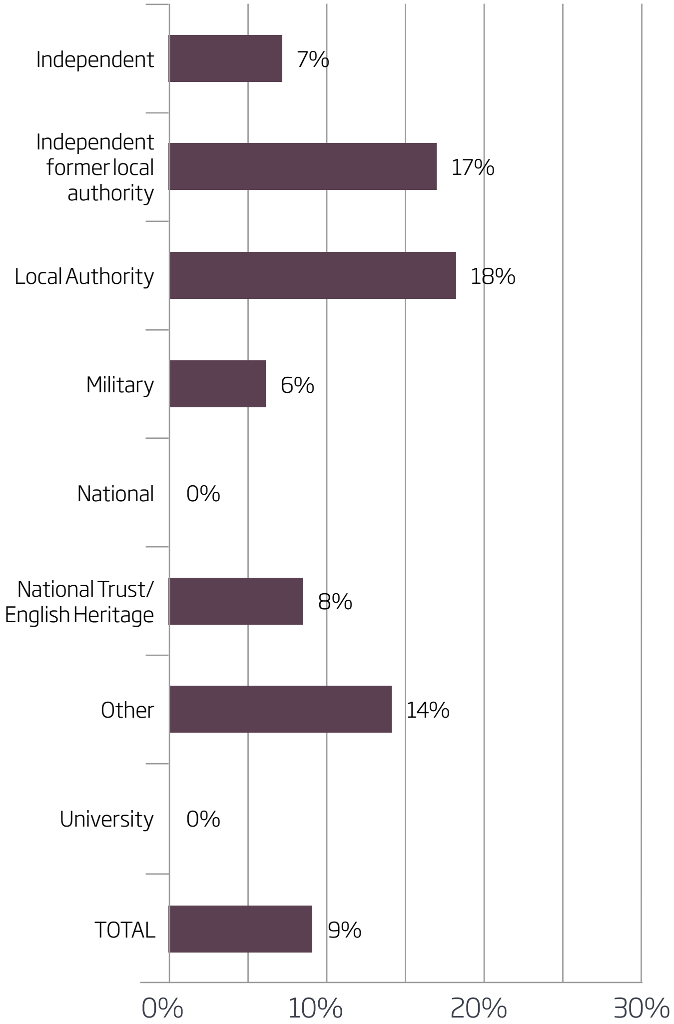
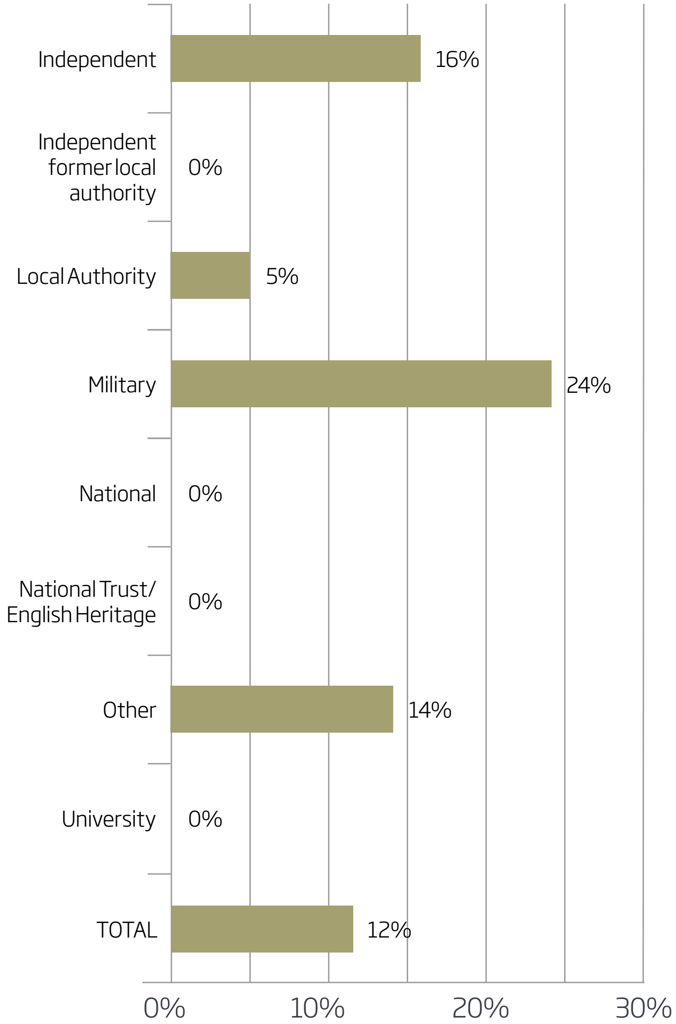


Fig. 5.6
Museums that do not use social media to engage with audiences



6 ECONOMIC IMPACT OF MUSEUMS

The contribution of museums to the wider UK economy is substantial. Museums play a direct role in their local economies through their own spending and employment. Our survey found that museums across the UK have an average total turnover of almost £1.28m. Clearly this varies greatly between different types of museum, ranging from national museums at the high end of the scale to military and independent museums at the lower end of the scale.

Museums also provide high quality employment across the UK. As noted above, museums responding to the survey said they employed an average of 12 full time equivalent (FTE) staff in 2015/16, rising to 17 with the inclusion of casual and seasonal staff (see p21).

While it is difficult to arrive at a precise figure, on the basis of our survey we estimate that museums in the UK are responsible for employing 30-40,000 FTE staff and 50-60,000 staff in total.

Museums also have a substantial indirect economic impact by contributing to tourism, cultural diplomacy, corporate partnerships, regeneration, local economic development, and learning and skills. While some studies[12] have looked into these areas finding, for example, that museums in England generate an average of £3 for every £1 of public funding they receive, further research is clearly required.

"Successful bid for Newcastle Gateshead to host Great Exhibition of the North. Completion of £500,000 Northern Powerhouse-funded development programme at Segedunum. Launch of 'Collections Dive' collections website in partnership with Microsoft Research."

Fig. 6.1

Total annual turnover in 2015/16	Average
English Heritage	£879,300
Independent	£442,881
Independent former local authority	£2,409,010
Local Authority	£846,950
Military	£144,333
National	£28,184,523
National Trust	£1,803,639
Other	£355,843
University	£1,312,277
Total	**£1,277,524**

[12] Economic Impact of Museums in England, ACE (2015) www.artscouncil.org.uk/sites/default/files/download-file/Economic_Impact_of_Museums_in_England_report.pdf

MUSEUMS IN THEIR OWN WORDS

Comments from respondents give an insight into their achievements in 2015-16, as well as some of the challenges they faced.

"We have welcomed in new groups following our Deaf Awareness Day and have reached more people."

"Trouble is, we are all doing positive work in our local community but no one in authority cares."

"The museum's new tea room, erected in 2015, has helped [it] to sometimes double its income on open days and has also proven to have had a positive impact on the overall visitor experience."

"From April the museum has moved from council funding to a charitable trust. Although our short term funding gap has been addressed, in the medium term we need to secure running costs, grow the visitor base and develop and outreach programme. Staffing of the museum has been cut."

"Museum will reopen in summer 2017 with 7,000 newly displayed specimens, reinterpreted narrative, new discovery space, new school facilities, new behind-the-scenes tours and volunteer-led visitor services."

"Local authority is looking for commercial partners for its heritage assets. The result has been that staff are leaving."

"Numbers of visitors for 2016 show an increase of 20% to date over the same period in 2015, and the comparable figures for school visits show an increase of 80%."

"Budgetary cuts will lead to re-organisation of front-of-house staff"

"The museum faces storage challenges in the future, as well as stretched funding. Much of our future relies on securing external funding and giving. We are also a very small staff base with many staff involved in tasks and activities across the service in order to meet our objectives and demonstrate benefit."

"People love museums, especially small ones like ours."

MUSEUMS
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