

The impact of cuts on UK museums

July 2012

A report for the Museums Association by Gina Evans

The cuts to the museum sector over the past two years have been widely reported on and were the focus of the Museums Association's (MA) 2011 report, **The impact of cuts on UK museums, July 2011**. This new report examines the impact of cuts a year on, but also focuses on the changes museums have made, and will be making, in order to survive in the tough financial climate. Museums with large-scale cuts face difficult times and continuing uncertainty, but many are now taking a more pragmatic and positive approach, adapting to the new landscape.

Key findings

- 51% of respondents reported a reduction to their overall budget compared to April 2011.
- 42% of respondents have reduced staffing levels.
- 22% of respondents have reduced access to sites by closing whole or parts of sites, permanently or temporarily.
- 31% of respondents have experienced a budget cut of more than 10%.

It is this last group that have seen the greatest impact upon public services:

- 83% of museums with a 10%+ budget cut have reduced staffing levels.
- 49% of museums with a 10%+ budget cut have introduced or increased charges for school visits.
- 43% of museums with a 10%+ budget cut have closed whole or parts of sites, permanently or temporarily.

There are also a number of respondents that are coping with the effect of cumulative cuts:

- 31% of respondents to both the 2011 and 2012 survey saw their budgets cut two years in a row.
- Of those respondents that had their budgets cut in 2011 and 2012, more than a third experienced a cumulative cut of 35%+ over two years .

However, there is a greater sense of optimism, with 36% of respondents believing that quality of service will increase over the next year, compared to only 13% of respondents from the 2011 survey.

This quality of service will, in part, be achieved by an increased focus on new ways of working:

- 69% of all respondents will concentrate more on generating income over the next year.
- 62% of all respondents will concentrate more in fundraising over the next year.

Introduction

In April and May 2012 the Museums Association (MA) asked museum staff to provide information regarding changes to their budgets, staffing operations and general service provision in order to provide a picture of the changing museum landscape and to provide up to date information following on from the MA's 2011 survey into the impact of cuts.

Respondents were asked to comment on budgets, staffing levels and service provision, including opening hours, museums closures and admission charges. Respondents were also asked to look forward to the coming year to provide information on the areas they will prioritise over the next 12 months and to comment on the changes they have witnessed, and those that are to come.

122 individuals responded to the survey, representing 114 museums and/or museum services. The body of respondents is broadly representative of the UK sector¹, with a regional balance and a variety of museums by type and size, as shown in the table below.

Region-nation /type	Independent	Local authority	National	Other (military /university)	Total
Central *	9	11	0	0	20
North **	10	14	4	2	30
Scotland	2	3	1	0	6
N Ireland	0	1		0	1
South***	23	16	0	4	43
Wales	3	9	1	1	14
Total	47	54	6	7	114

*Central – East of England, East and West Midlands

**North – North East, North West, Yorkshire and Humberside

***South – South East, South West and London

In this report, Section 1 offers a broad overview of the sector, analysing information from the entire body of survey respondents and considering the budget cuts museums have faced as compared to April 2011 and the impact this has had upon staffing levels and service provision. Section 2 concentrates on all museums that have experienced a budget cut and those organisations that have experienced a budget cut of more than 10%. Section 3 considers the impact of year-on-year cuts, looking at the situation across two years with reference to the survey that the MA conducted in 2011. Section 4 looks ahead to the coming year with an emphasis on the areas of work that organisations will be focusing on, the new ways of working and the changes occurring in the museum sector.

¹ No responses were received from London-based national museums, although they were given the opportunity to participate.

Section 1

Key findings from all respondents

This section looks at the key findings from the data provided by the entire body of respondents, considering the level of cuts organisations have faced and the impact on staffing and service provision.

Figure 1.1 Changes to overall budget since April 2011

% change to budget	25%+ decrease	10-24% decrease	5-9% decrease	1-4% decrease	Same	1-4% increase	5-9% increase	10%+ increase
Number of respondents	14	21	8	15	39	4	5	8
%	12%	18%	7%	13%	34%	4%	4%	7%

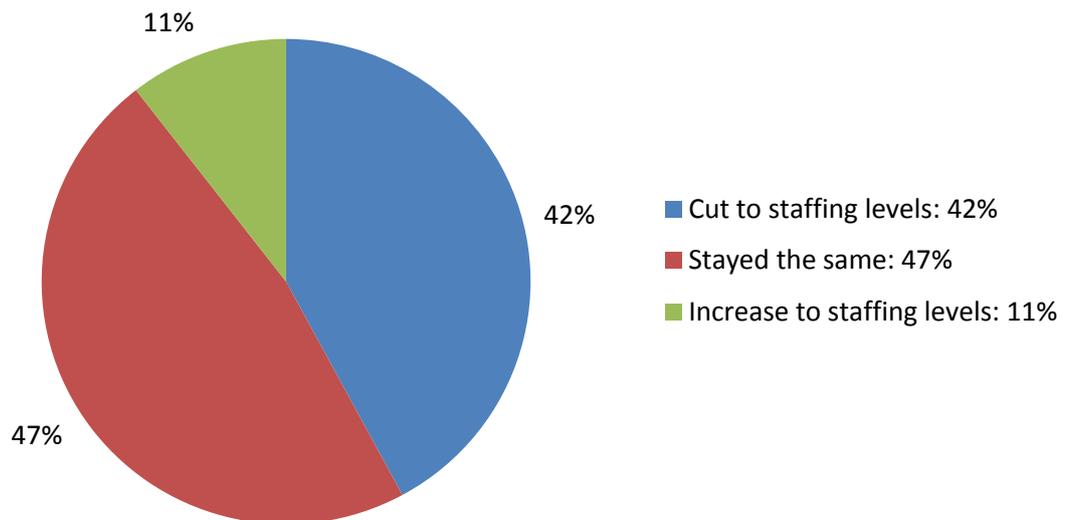
Overview

51% of all respondents, 58 organisations, have experienced a cut to their overall budget. 31% of all respondents, 35 organisations, have experienced a cut of more than 10%.

Staffing

Respondents were asked to compare the total number of full time equivalent paid staff with that of April 2011. Figure 1.2 shows that 42% of respondents have seen a cut to staff numbers. A quarter of respondents have seen a cut to staffing levels of more than 10%.

Figure 1.2 Changes to full time equivalent staff compared to staffing levels in April 2011



Respondents were asked to comment on whether the proportion of volunteers had increased, remained the same or decreased, with 39% reporting a larger proportion of volunteers within the workforce compared to April 2011. The use of volunteers can bring benefits to museums but should not be seen as a replacement for skilled professionals, and the work and time involved in supporting volunteers should not be underestimated.

“Having not used volunteers before, we now have a team of them, trained in many basics, to work with the collections. This is wonderful, but is additional to our everyday work of running the museum and in reality gives more work and pressure to paid staff who have to devise work plans and supervise. We are happy that it is happening, but wish we had greater staffing ability to cope with it. Volunteers in our experience are very hard work.”

Curator, independent museum, Wales

Service provision

The cuts to budgets and staffing have had an impact on the public facing services that museums are able to offer, with the data showing that 22% of museums have had to close a part of their site either temporarily or permanently.

18% of respondents reported a reduction in their opening hours and, of this group, 52% are reducing their hours by more than 11 hours a week.

“Due to [a] reduction in staff and having to close before October we could not open for the school holiday fortnight.”

Principal museum officer, local authority museum, Scotland

“Following a 66% reduction in what is now our collections access team in 2011-12, we now do very little outreach, and maintain a smaller onsite exhibition.”

Head of libraries and heritage, local authority, central

Although some museums are reducing services, the outlook is more positive when looking at the data for events and the introduction of admission charges.

71% of respondents are either maintaining or increasing the number of events and activities that they are offering to the public. The survey did not ask respondents to comment on whether or not these are paid events but the strong performance in this area could be explained by an increased focus on income generation, as evidenced in Section 4.

50% of respondents do not currently charge an admission fee, and a further 35% report no change in the fee for entry to their permanent collection. Similarly, 58% do not charge for entry to special exhibitions. Only 3% of respondents had introduced a charge for permanent collections and 8% for special exhibitions.

There is one area, however, in which charges have changed more significantly, with 27% of respondents increasing or introducing charges for school visits.

“We have introduced charges in free areas, which obviously changes the relationship with the community and stakeholders and we have cut back on work for schools.”

Director, independent museum, south

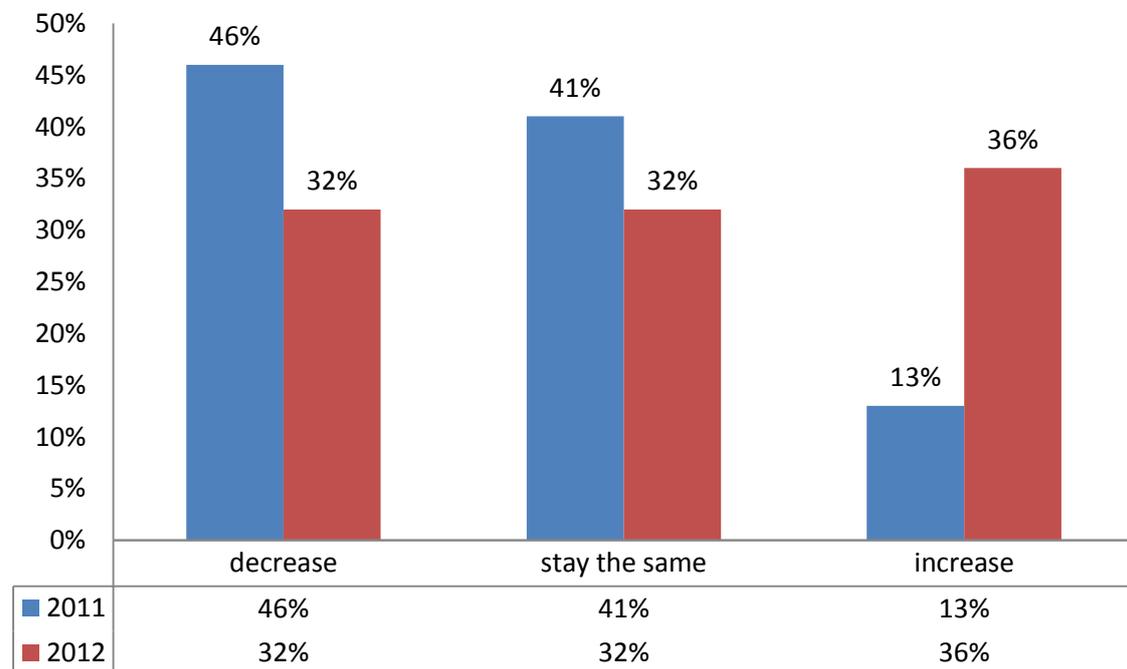
Quality of service

All respondents were asked the following question:

“In the coming year, do you personally feel that the quality of service provided by your museum will increase, decrease or stay the same?”

As shown in Figure 1.3, the majority of respondents, 36%, felt that the quality of service would increase.

Figure 1.3 Change to quality of service in coming year



This is in marked contrast to the response to the same question in the 2011 survey, when only 13% felt the quality of service would increase. It is arguably a reflection of a renewed determination within the sector to thrive after the initial shock at the severity of the cuts in the previous financial year. But this dedication to public service can place a strain on an already stretched workforce.

“Paid staff now work well beyond their job descriptions and contracted hours just to keep things going but there is a strengthened team spirit and a wish not to let the cuts affect public service.”
Director, independent museum, Wales

“We simply cannot conceive of cutting standards and quality even in these harsh times. We would rather go down with our heads held high than suffering a long lingering death through a thousand cuts.”

Director, independent museum, south

Section 2

Museums that have seen a cut to their budget

This section concentrates on the 51% of respondents - 58 museums or museum services - that have experienced a cut to their overall budget, looking at the effect this has had on service provision and staffing. The latter half of this section considers the 35 museums, representing over a quarter of all respondents, that have had their budgets cut by more than 10% and compares the impact of differing levels of cut.

Overview

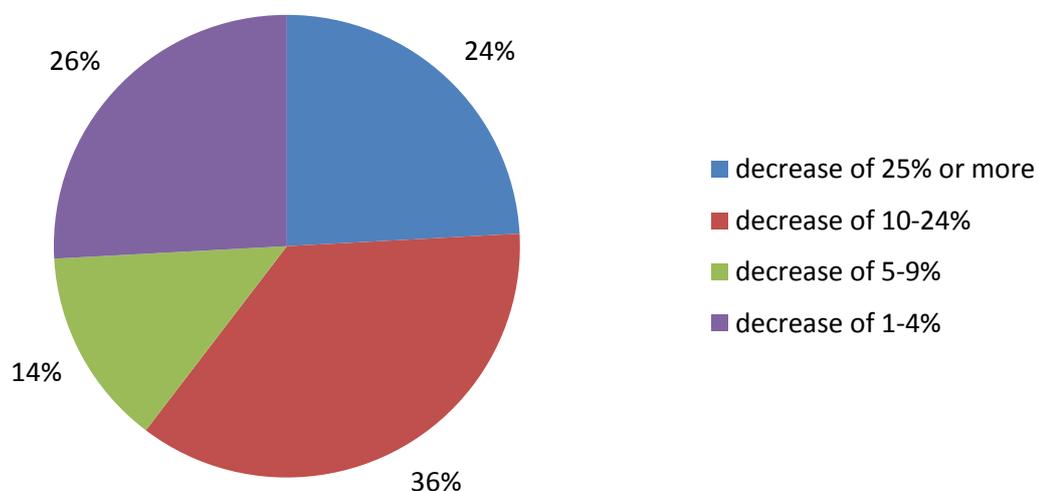
Although all types of museums have been subject to budget cuts the majority of cut museums, 60%, were local authority as shown in Figure 2.1. This was also the type of museum that had experienced the most severe cuts, with 66% having budgets cuts by more than 10%.

Figure 2.1 Museums with budget cuts by type

Type of museum	Number with budget cut	% with budget cut
Independent	15	26%
Local authority	35	60%
National	6	10%
Other	2	4%

Figure 2.2 shows that, of the museums that have experienced a budget cut, 60% have seen a cut of more than 10% and nearly a quarter have seen their budget reduced by 25% or more.

Figure 2.2 Size of budget cuts

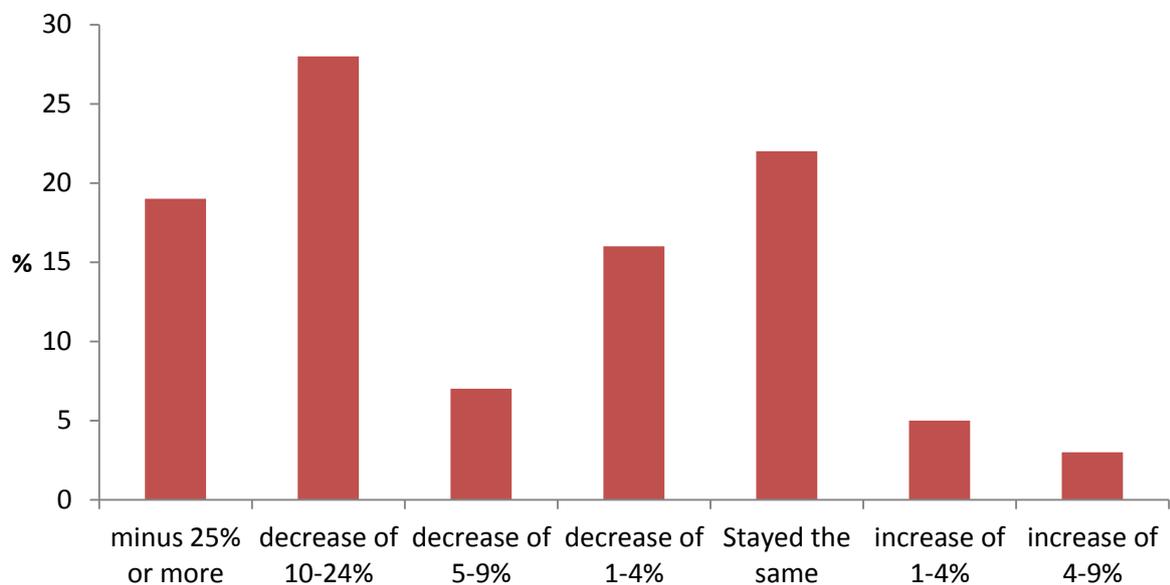


Staffing

69% of museums that have had a cut to their budget have reduced the number of full time equivalent staff compared to April 2011. Figure 2.3 displays the levels of staff cuts and shows that 47% of organisations with a cut to their overall budget reduced their staff by more than 10%. Half of those museums also reported that volunteers now constituted a higher proportion of staff than they had in April 2011.

Figure 2.3 shows that a small percentage of museums have actually increased staff numbers, which is indicative of the fact that museums taking on wider responsibilities; for example, one museum is merging with visitor services and acquiring new customer service staff, although it has lost curatorial staff.

Figure 2.3 Level of staffing cuts for museums with a budget cut



Service provision

Of museums that have had their overall budget cut as compared to April 2011, 34% have seen whole, or parts of, sites closed permanently or temporarily, 31% have seen a reduction to the main site's opening hours and 38% have introduced or increased charges for school visits to their sites.

Budget and staffing cuts have had an impact on morale, with 48% of this group believing that the quality of service they can offer in the coming year will decrease, compared to only 21% believing it will increase.

"Morale [is] very low due to announcement of 25% staff cuts plus slashed running budgets and blocks on programmes planned for 2012/13."

Education manager, national museum, north

Museums with a cut to their budget of more than 10%

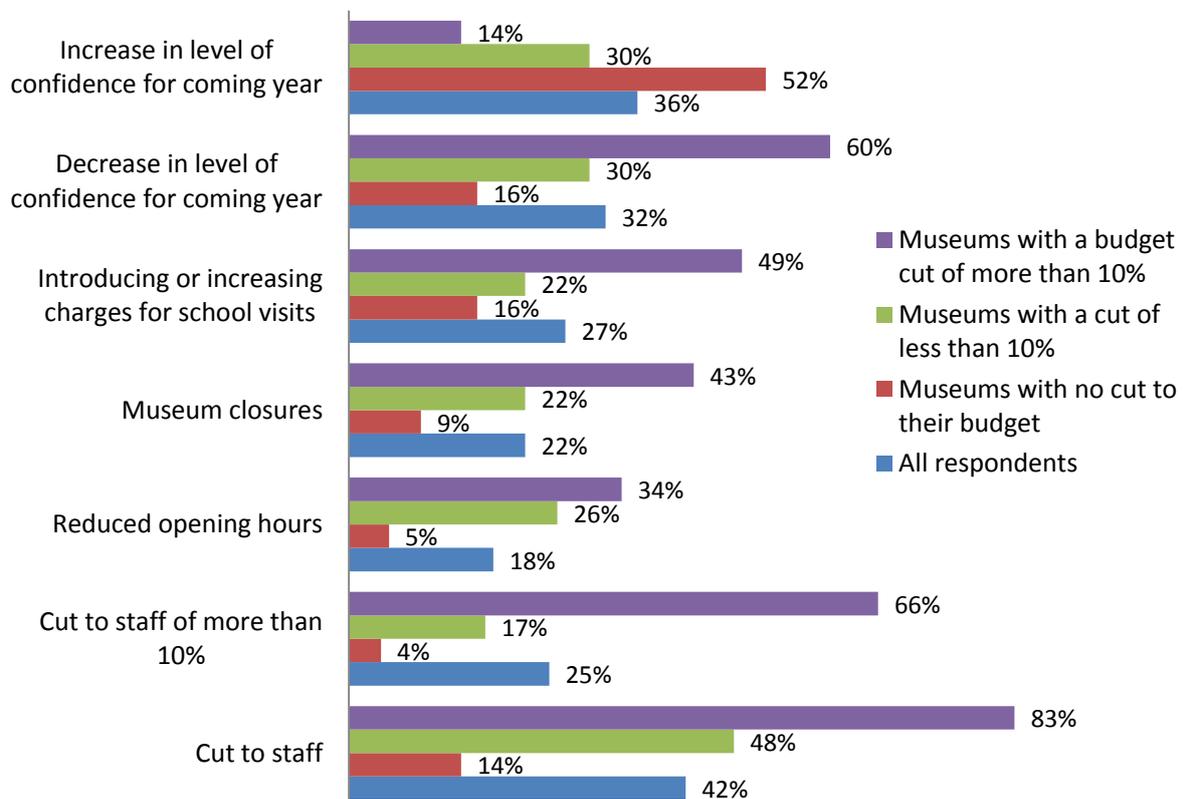
Of the 35 museums that have had a cut to their budget of more than 10%, 83% of these have cut staffing levels and 66% have cut their staff by more than 10%. 43% have seen parts or whole sites closed permanently or temporarily, 34% have seen their opening hours reduced and nearly half, 49%, have increased or introduced charges for school visits.

When it comes to looking forward to the coming year only 14% of museums with a budget cut of more than 10% believe that the quality of service they can offer will increase, with 60% believing the quality of service will decrease.

“We have taken such a cut to staff that inevitably the amount of development work will reduce. We have fewer curators and education staff. The museum will drive more towards using volunteers, generating income and have less development work and the quality of the exhibitions will decrease.”
Operations and exhibitions manager, local authority museum, north

Figure 2.4 compares the impact on staffing, service provision and confidence in quality of service of differing levels of cuts and shows that the more severe the cut the more likely a museum is to cut staff, reduce opening hours, close sites and introduce charges. A museum with a budget cut of more than 10% is more than twice as likely to cut staff and to introduce charges for school visits as a museum with a cut of less than 10%.

Figure 2.4 Comparison of staffing and service provision of organisations with differing levels of budget cuts

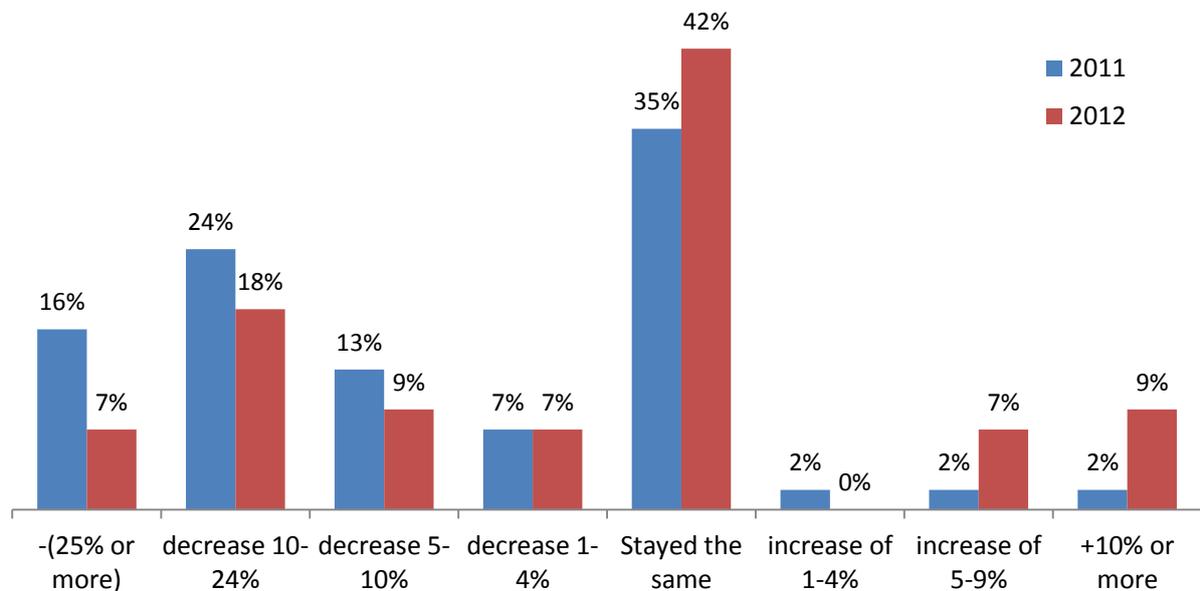


Section 3

2011 and 2012

This section looks briefly at the cumulative effects of the cuts using data from the MA's 2011 and 2012 surveys. 55 organisations participated in the survey in both 2011 and 2012, allowing for some analysis of the impact of the cuts across two years. Figure 3.1 compares the budget cuts experienced by these 55 organisations in 2011 and 2012 and shows that more drastic cuts occurred in 2011, with 2012 showing that a slightly higher percentage of organisations saw their budget stay the same or increase.

Figure 3.1 Comparison of budget cuts for museums participating in 2011 and 2012 surveys



Although the outlook for 2012 is more positive, a closer analysis of this group of 55 shows that 17 of the organisations, 31%, saw their budgets cut in both 2011 and 2012 and a further 22 organisations experienced a cut in either 2011 or 2012. This means that a total of 39 of those organisations, 71%, experienced a cut in at least one of the years in which they were surveyed.

Of the 17 organisations who had their budgets cut in both 2011 and 2012, 65% saw their budget cut by at least 15% over two years and more than a third experienced a cut of at least 35% over two years. Therefore, despite a more positive overall outlook for 2012, a number of museums are experiencing year-on-year budget cuts. Even those organisations that have seen their budgets increase in 2012 are often still worse off than they were before 2011, due to budget cuts in previous years.

“A further cut of £12,000 in local authority [spending] has happened this financial year. This will be followed by a further cut in 2013. The effect will be an overall cut in local authority funding of 55% over three years. This will leave the museum with less funding [than] it had in 2004 and less staff hours.”

Operations manager, charitable trust, Wales

The feeling from respondents is that although things may be more positive this year as compared to last year the cumulative effect of cuts, potential further cuts and an unstable economy are all contributing to an uncertain future.

“We are just about getting by, but further cuts could be disastrous.”

Chairman of trust, independent museum, central

“The budget is stable for the time being but the medium-term outlook is gloomy.”

Museums and heritage officer, local authority museum, Wales

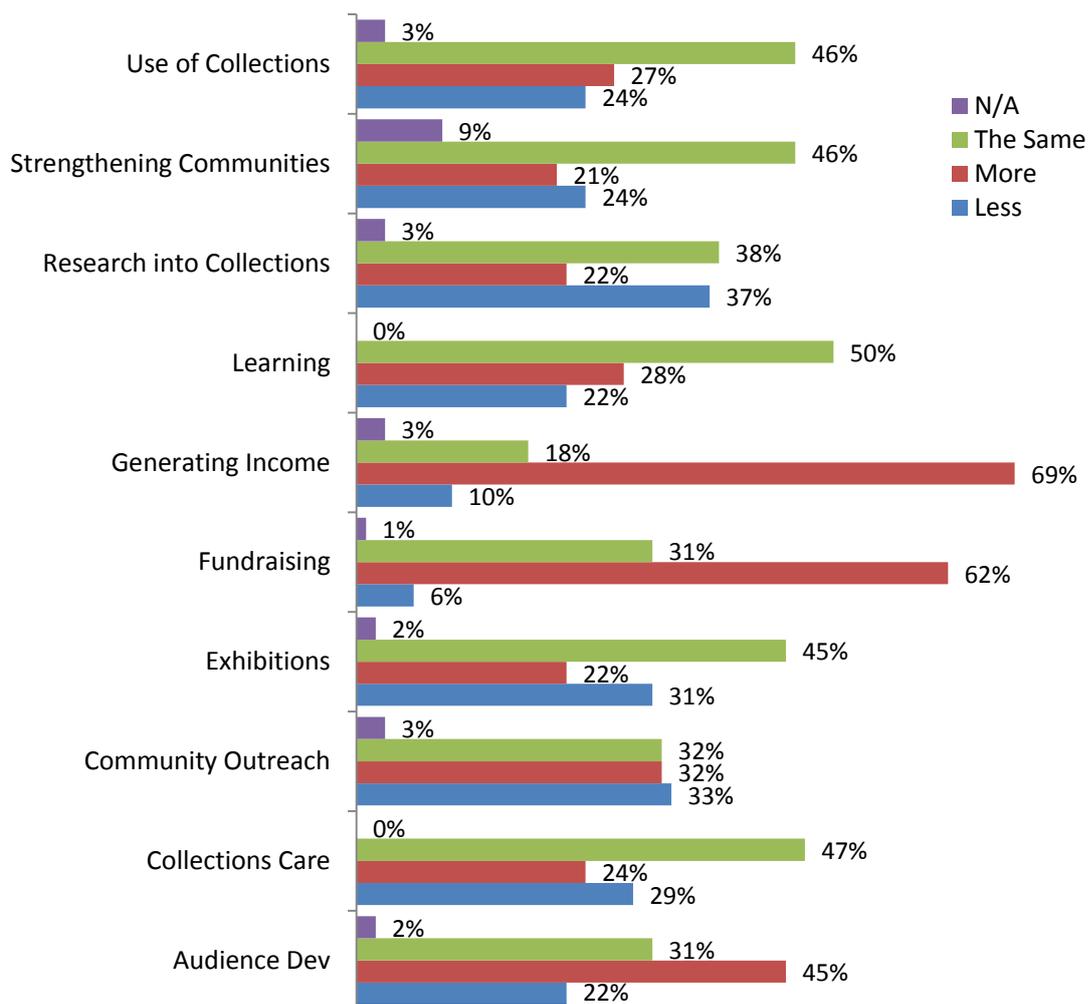
Section 4

Looking ahead

This final section focuses on the coming year, looking at the areas of work all respondents will be focusing on and the new ways of working being adopted by museums represented in this survey. The comments show that there remain areas of concern and uncertainty but that many museums are accepting, even embracing, changes and adopting new ways of working.

All respondents were asked to comment on the areas in which their organisation would be doing more, less or the same level of work. Figure 4.1 illustrates a mixed picture across the sector. There are however, two areas of work that respondents will be focusing more on in the coming year: 69% of respondents will be focusing more on generating income and 62% on fundraising activities. It is also interesting that 45% of museums will be focusing more on audience development as opposed to only 22% doing more collections research, suggesting an increasingly audience- rather than collections-focused approach.

Figure 4.1 Areas of work museums will be focusing on in the coming year



External funding/fundraising

The significance of the focus on fundraising is further highlighted by many museums commenting that continuing work across the museum, in areas such as learning and collections care, increasingly depends on external funding. This is for many the only reason they are able to continue providing a quality service and employing staff.

“In the coming year we will have to find grant funding to maintain the services of our education officer.”

Curator, local authority museum, Wales

“Whilst we have faced cuts (and increased income targets) we have a number of externally funded projects at the moment that are sustaining levels of service and service enhancement.”

Local authority museum, north

For some, the changes made by external agencies such as Arts Council England (ACE) have brought new funding opportunities and changed museums’ working practices in line with funders’ priorities. A reliance on external sources can bring uncertainty to an organisation, because it will have to regularly reapply for funds, but can equally lead to a more dynamic museum environment as museums pursue new projects and ways of working to attract funders.

“Ability to access new/previously closed (i.e. Renaissance) streams of funding via [the] arts council should have a positive impact.”

Director, independent museum, north

“The museum employed four more permanent staff early in 2011, many of whom are supported by external grant. We have also set up a significant volunteer programme to improve service delivery. Operating budgets, however, continue to be squeezed and we expect difficulties in these areas in the next two to three years.”

Heritage services manager, local authority museum, Wales

“Just survived my second restructure in two years - but only saved by major ACE funding to the museum. New funding priorities are fundamentally changing our working practice, with less of what the public expect us to do, e.g. enquiries, talks, research. Targeting new audiences with funding attached, whilst risking established core visitors. Fundamental work such as collections care and documentation is under threat.”

Assistant curator, local authority museum, south

Generating income

For many finding alternative revenue streams and ways to save money is increasingly important.

“Competition for funding from trusts, foundations and corporate sponsors has greatly increased over the last two years, and I expect will continue to do so. We will be focusing on submitting a higher volume of grant applications, securing more venue hire and looking at other sources of funding.”
Operations manager, independent museum, south

“We have already had cuts of 40% in our budgets since 2004. In future, 60% of our costs will have to be made from income generation.”
Registrar, local authority museum, central

“We have installed solar panels and are now both cutting our electricity expenditure and generating enough to sell back to the grid.”
Chair of trustees, independent museum, south

“Grants decreased, admissions income increased. Now prioritising projects which improve income generation.”
Director, independent museum, Scotland

Change of focus

Some worry that the increased focus on income generation and fundraising will mean that collections care will be given less attention and that specialist staff and museum skills will be lost.

“The cuts... pose serious risk to the care of collections as collections management time is reduced. Expert knowledge is also threatened, with cuts resulting in one person doing more than one job, or increasingly with volunteers 'replacing' paid staff.”
Curator, independent museum, south

“One main issue is that we are being asked to create more 'access to collections' whilst cutting curatorial staff. Collections management will suffer as it is often the aspect that slides.”
Assistant keeper, local authority museum, north

“Staffing levels have gone down in many areas, outreach work has decreased - curatorial priorities have changed and specialist staff have been cut.”
Curator, independent museum, central

“Fundamental work such as collections care and documentation are under threat.”
Assistant curator, local authority museum, south

New ways of working

The survey shows that an increased focus on income generation, closures to sites, the reduction of opening hours and the introduction of charges for school visits are seen as unavoidable parts of the new museum landscape. It is perhaps this pragmatic realisation that has led a number of organisations to take a more positive outlook than last year and respond to the situation by reflecting, reassessing and providing increasingly audience-focused, high quality services.

“Our reduced opening hours have provided the opportunity for remaining staff to prepare more and [provide] better education activity and exhibition programmes against a background of declining usage from schools for paid services.”

Principal officer, museums, arts and heritage, local authority, central

“We are increasing our efforts to make the museum relevant to the community by encouraging more work experience students, engaging more with schools and increasing our opportunities to be involved with outreach work to vulnerable groups (e.g. Alzheimer’s Society memory cafes). We have been made more aware of possible sources for funding and grants.”

Chairman, independent museum, south

“We’re dependent on tourism, so fuel costs and weather affect our visitor numbers and earned income more than is desirable, but true independence gives us great freedom to act quickly, seize opportunities and be creative in becoming a ‘must’ destination. Museums should not act in isolation; they must work for their community in constructive ways. Our aim is to develop a sense of place for residents and tourists.”

Curator, independent museum, north

“The funding cuts can give greater opportunities for increased community engagement and consultation, in particular to find out what services need to be delivered and fundraised for.”

Curator, independent museum, south

“The budget cuts have caused us to re-evaluate what we do and make some positive changes.”

Director, local authority museum, central