MUSEUMS ASSOCIATION

CUTS SURVEY 2014

November 2014

www.museumsassociation.org

CONTENTS

INTRODUCTION

Since 2010, museums across the UK have experienced an unprecedented level of cuts to public funding. Local authority and national museums have been particularly badly hit.

The Museums Association (MA) has been tracking the impact of these cuts on museums year by year since conducting its first annual cuts survey in 2011*. The results of previous surveys have shown that cuts to public funding have inflicted serious damage on the sector, affecting almost every area of museum work.

The negative effects of cuts on the museum-going public have been unavoidable, with budget constraints having a sustained impact on frontline services. Museums have been obliged to reduce opening hours and access, introduce charges, cut exhibitions and free events, and curtail school visits and outreach work. Some well-loved institutions have closed to the public. This year's survey has also shown that, in the past year, one in 10 respondents has been forced to consider selling objects from collections to generate income.

The museum workforce has been severely affected. Over the last four years, museums have lost large numbers of paid staff, wages have fallen and the number of unpaid roles has increased. This has led to a loss of experienced staff and professional expertise, as well as an increase in exploitative employment practices. It has also affected museums' public service provision, collections management and research capabilities.

However, the four surveys have also demonstrated that the sector is committed to becoming more resilient and entrepreneurial year on year, with a growing focus on fundraising, exploring alternative income streams and reshaping business practice. More than one third of museums reported a rise in their self-generated income this year – but the latest survey has also shown that others do not have the same flexibility in this area and require more support to adapt quickly enough to keep pace with funding cuts.

The MA's 2014 cuts survey sets out to provide an up-to-date overview of the cumulative effect of the last four years of cuts and provide a picture of the overall health of the sector today.

*for previous surveys see:
www.museumsassociation.org/campaigns/funding-cuts/cuts-survey

INTRODUCTION

Background to the survey

Between July and September 2014, the MA asked museum staff to provide information regarding changes to their budgets, staffing operations and general service provision.

Respondents were asked to provide information on various aspects of their work and operations, and to comment on the changes they have witnessed over the past year. They were also asked to identify the areas they will prioritise over the next 12 months and to comment on changes that might be still to come.

For the first time, this year's survey also asked staff whether their museum had considered financially-motivated disposal.

Ninety-five museums or museum services are represented in this year's survey. The body of respondents is broadly representative of the UK sector, with a regional balance and a variety of museums by type and size, as shown in Figure 1.1.

Figure 1.1
Profile of respondents

Area / Type of museum	Independent	Local authority	National	Other (including military and university)	Total
Central England*	5	10	0	2	**17**
North of England**	4	7	4	3	**18**
South of England***	12	14	5	6	**37**
Northern Ireland	1	0	0	0	**1**
Scotland	2	5	1	2	**10**
Wales	5	6	1	0	**12**
Total	**29**	**42**	**11**	**13**	**95**

*East of England, East Midlands and West Midlands
**North East, North West and Yorkshire and Humberside
*** South East, South West and London

KEY FINDINGS

From summer 2013 to summer 2014

- One in 10 responding museums said they had considered selling parts of their collections.
- More than half (52%) of responding museums experienced a cut to their overall income. This is the highest percentage to report a cut since the 2011 cuts survey.
- Almost a third (32%) of respondents saw their overall income decrease by more than one tenth, and 11% said their income had fallen by more than a quarter.
- Respondents had some success with alternative funding streams; over one third (35%) said their self-generated income had risen.
- The museum workforce continued to suffer as a result of reduced funding. More than half (53%) of respondents cut full-time staff, the highest percentage since the cuts survey began in 2011.
- Over a third (34%) of respondents cut staff numbers by more than 10% (compared to 21% of respondents in 2013).
- Almost a third (32%) of responding museums increased the number of volunteers and interns.
- Almost a quarter (23%) of respondents reduced the number of temporary exhibitions.
- More than a third (36%) of respondents said the number of school visits had decreased.
- A quarter (25%) of respondents reduced the free events they offer.

In the coming year

- There has been a significant drop in confidence since last year's survey. More than two fifths (41%) of respondents feel the quality of their service will decrease, compared to 27% last year.
- Nearly four fifths (79%) of respondents say they will focus more on fundraising and 65% say they will focus more on generating income.
- Almost half (44%) of participants say they will focus more on encouraging participation – but 26% say they plan to do less in this area.

Over four years

The MA's cuts survey has reported year-on-year findings over a four-year period. These reveal that:

- Staff numbers decreased at 53% of responding museums in 2014, 37% in 2013, 42% in 2012 and 51% in 2011
- Income was down at 52% of respondents in 2014, 49% in 2013, 51% in 2012 and 58% in 2011.
- 41% of respondents thought that the quality of service provided by their museum would decrease over the next 12 months in 2014, 27% in 2013, 32% in 2012 and 46% in 2011.

In this report

Section 1: looks back over the past year and focuses on the changes that have taken place.

Section 2: looks towards the year ahead at expected changes to quality of service and the areas of work that museums plan to focus on.

Section 3: looks at qualitative data to offer a forecast for the next three years ahead.

Throughout the report, reference and comparison is made to previous cuts surveys undertaken by the MA in order to provide an overview of the changes to the sector over a four-year period.

SECTION 1: THE PAST YEAR

How have things changed for museums over the past year?

Respondents were asked about their income, public services and staffing as of summer 2014, compared to the previous year.

Overall income

The majority of respondents (52%) experienced a decrease to their income on the previous year. Out of the total number of respondents, 11% experienced a significant drop of 25% or more to their budget, while just over one fifth (21%) experienced a cut of between 10% and 24%. Just under a quarter of respondents (24%) said their income had stayed the same and 22% experienced an increase.

Of the museums that reported decreased income, 47% were local authority museums, 27% were independent museums, 14% were national museums, and 12% were other types of museums.

The data shows that proportionately, local authority and national museums have been the worst affected. Of the 42 local authority museums that responded, more than half (55%) said their income had fallen. A higher proportion of national museums saw a fall in income. Of the 11 nationals to respond, seven reported a decrease.

The picture is more varied with independent museums. Of the 29 independents that responded, 45% saw a decrease in income; but they were proportionately more likely to report a rise in revenue too, with 28% saying their income had increased. Of the 13 other types of museums that responded, 46% reported a fall in income, while 38% said it had increased.

In terms of geographical location, the data suggests that museums across all regions and nations have been impacted, but Scotland and Central England had the highest proportion of respondents saying their income had fallen, at 90% and 60% respectively.

"Core funding reduced by 10%, leading to staff losses, increased charges and reduced public services."

Local authority museum, Central England

"Lots of management cuts. No money to do anything. Keeping going but only just. There is nothing left to cut except closing buildings and frontline jobs."

Local authority museum, Scotland

"We are already at the point of being unviable, we can't afford any more cuts. Have been told to find another 3% by the 2015/16."

Independent museum, Wales

Figure 1.2
Changes to overall income (excluding capital projects)

25%+ decrease	10-24% decrease	5-9% decrease	1-4% decrease	Stayed the same	1-4% increase	5-9% increase	10%+ increase	Did not answer
11%	21%	7%	13%	24%	8%	6%	8%	1%

SECTION 1: THE PAST YEAR

The percentage of respondents reporting a decrease in income has risen this year and the severity of cuts has also increased; the number of museums reporting a drop of 25% or more has risen from 4% to 10% since 2013.

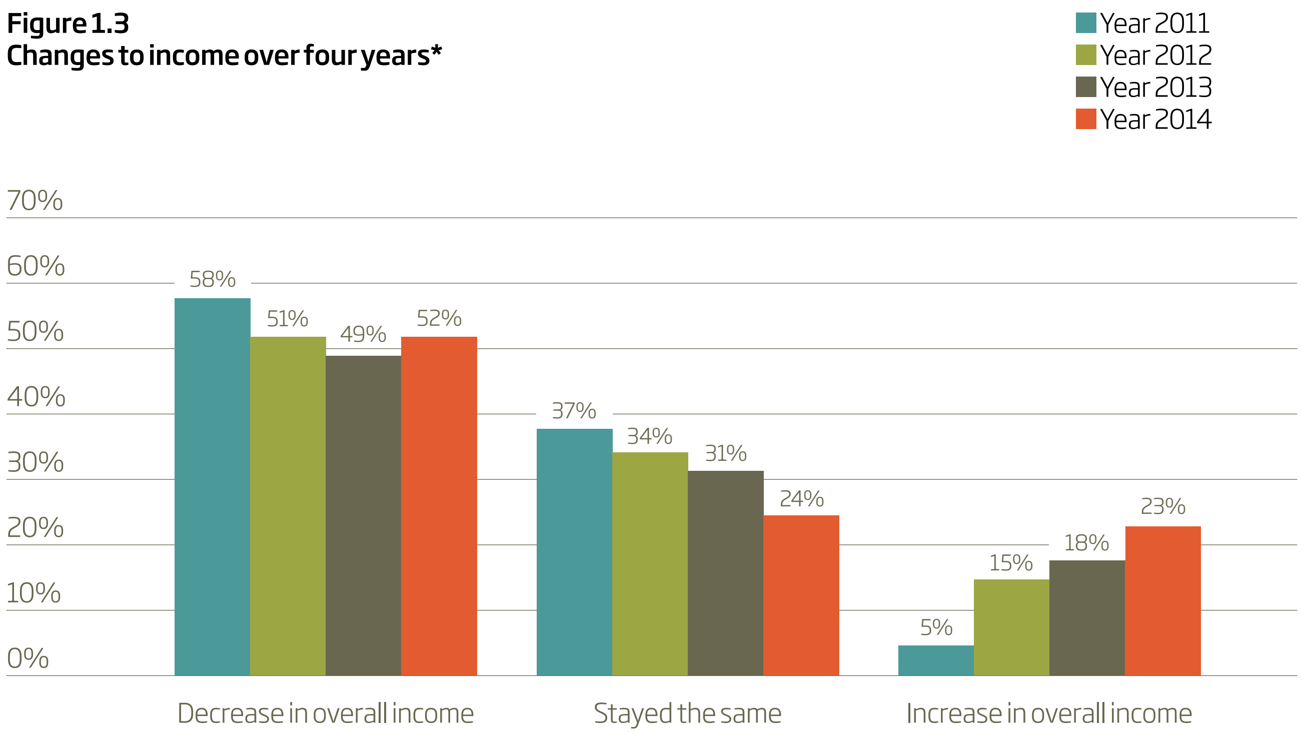
In every year the survey has been carried out, the majority of respondents reported a drop in income. For some museums this will mean cuts have been taking place year on year, and the cumulative effect of this means that they are now at tipping point; a number commented that there are no efficiency savings left to be made and any further cuts may severely diminish their services or force them to close altogether.

"Council is currently proposing a 42% cut in our grant. If implemented this is likely to lead to the closure of the museum."

Independent museum, South of England

Encouragingly, however, this year also saw the highest number of respondents (23%) reporting that their overall income had increased. This figure has risen every year since 2011 and there may be differing reasons for the rise. For some museums, the most severe cuts may have taken place early and their income has risen since then (though this does not mean it has recovered to the same level as before). The rise may also indicate that museums are successfully generating income through other streams, while for others it could indicate an increase in project funding.

Figure 1.3
Changes to income over four years*



*excluding capital projects

SECTION 1:
THE PAST YEAR

Changes to income streams

This is the second year that the survey has specifically asked respondents for information on self-generated income (retail, venue hire, admission charges, etc.) and individual giving (philanthropic donations, fundraising efforts, etc.). Policy-makers have strongly encouraged the museum sector to expand these income streams in order to ensure long-term sustainability in the face of funding cuts.

Last year's survey showed that a large majority of respondents were planning to focus more on developing these alternative income streams, and a significant percentage - just over one third (35%) - have seen their self-generated income rise this year. However, the majority said it had stayed the same and 24% reported that it had decreased. The success rate for individual giving was lower, with 22% saying it had increased and a significant majority (58%) reporting no change. This result is slightly worse than last year's findings, which showed that 42% of respondents had increased self-generated income and 28% had increased individual giving.

These results suggest that while many museums are making a serious effort to focus on resilience and become less reliant on public funding, realistically, some may need more time and support in this area in order to keep pace with the current rate of cuts. A number of respondents reported that reduced staffing and operational capacity had hampered their ability to develop and maximise alternative income streams. Geographical location, demographics and external economic factors may also be having an impact on the rate at which museums can adapt. Local authority museums in particular may be less flexible and face restrictions in how they raise income. This means that while commercial and philanthropic models may be working well for some, for others they are not enough to offset the effect of cuts.

"True efficiency savings now exhausted. Commercial activity blunted by weak tourist market."

Independent museum, South of England

"We are finding 'future-proof' ways of becoming more sustainable and resilient, from installing low energy LED lighting in the galleries to developing a fundraising strategy targeting legacies and individual giving."

Local authority museum, South of England

"Developing an entrepreneurial spirit in a local authority service is challenging."

Local authority museum, South of England

Figure 1.4
Changes to self-generated income and individual giving

	Self-generated income	Individual giving
Decreased	24%	15%
Stayed the same	40%	58%
Increased	35%	22%

SECTION 1: THE PAST YEAR

Public services

Previous surveys have shown that although museums are striving to maintain frontline public services, cuts have had a significant impact on what museums can offer their audiences.

Access

Public access has been hit, with just over one fifth (21%) of respondents reporting that they have cut opening hours, an increase on the 11% that said they had done so in 2013. Of those with reduced hours, 30% said opening times had been cut by 10 hours or more per week. A small but significant minority (9%) said that part of their museum or its branches had closed to the public in the past year. This is down from a peak of 22% in 2012, but remains a worrying trend when added to the closures of previous years. A number of respondents also said they had been obliged to introduce or increase admission charges, reducing access to less affluent communities.

"Museums may close to the public or no longer be open seven days a week."

National museum, nation/region

"Substantial budget cut likely to lead to public closure of one of our facilities."

Local authority museum, Wales

Public-facing activities

As in previous years, many respondents said they have had to cut back on their public offer. A quarter of this year's respondents said the number of free events they offer had decreased, and 23% said temporary exhibitions had fallen; both figures are similar to last year (28% and 23% respectively).

However, the majority of respondents said their organisations had maintained the free events (54%) and exhibitions (57%) they offer, indicating there is still a strong desire to prioritise these services in the face of cuts.

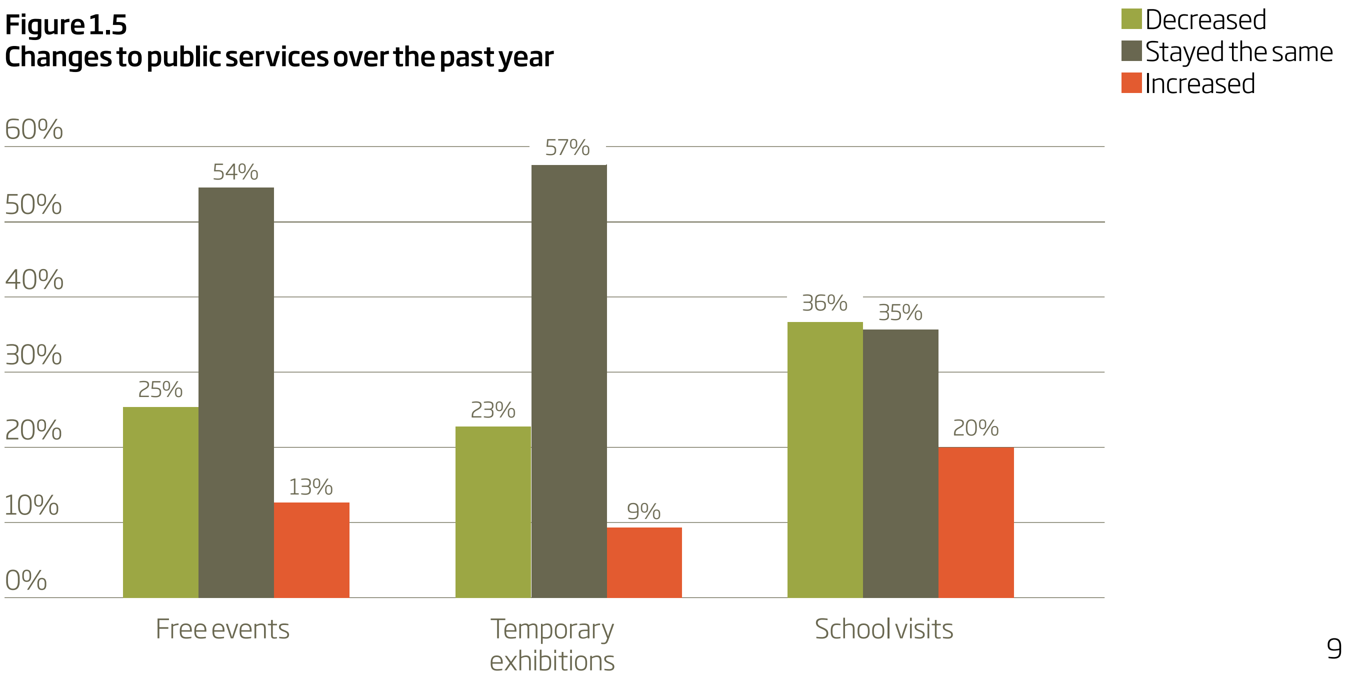
"The curatorial team has reduced the amount of work they take on, especially anything directly engaging with the public… Cuts have led us to be less ambitious in planning family activities."

National museum, nation/region

"It is vital that we don't overspend – if this means providing less for the public but maintaining our collection care procedures, so be it."

Independent museum, Scotland

Figure 1.5
Changes to public services over the past year



SECTION 1:
THE PAST YEAR

School visits

There has been an increase in the percentage of respondents saying that school visits have fallen (36% as opposed to 31% in 2013); this trend is a cause for concern. It may primarily be attributed to cuts to education staff and schools activities, but recent changes to the national curriculum in England and the sidelining of cultural subjects in the English Baccalaureate may also be having an impact. However, a higher percentage of respondents (20%) also said that school visits had increased in the past year, compared those who had seen free events (13%) and temporary exhibitions (9%) increase. This indicates that some museums may be prioritising their educational offer or adapting well to any curriculum changes.

"We have lost our education officer so are no longer working actively with schools."

Independent museum, Wales

"So far this year we have only had three school visits."

Independent museum, South of England

"Individual study visits and group visits are often choosing the cheapest options of self-guided visits rather than pay for museum staff time for collection-based visits."

Independent museum, North of England

SECTION 1: THE PAST YEAR

Staffing

Over the four years of the cuts survey, results indicate that staff numbers have been falling significantly across many organisations and are yet to reach a plateau. This year's survey bears that out; the majority of respondents (53%) said that full-time equivalent staff numbers had decreased on last year, with 18% reporting that they had fallen by between 10-24%, and 16% saying they had dropped by 25% or more.

This is the highest percentage of respondents that have reported staff cuts in all four surveys; 37% reported a reduction in 2013, 42% in 2012 and 51% in 2011.

Because museums have high fixed operating costs, redundancies are one of the primary ways in which organisations can save money; it is clear from these results that funding cuts are having a direct and severe impact on the museum workforce. Qualitative data bears this out, with respondents describing a drop in morale, falling wages, growing workplace pressure and a drain of professional expertise.

"As we are a very small team I have definitely seen an increase in work volume but also the length of working in hours in order to get the work completed. "

Independent museum, South of England

"I am hugely concerned by the movement of staff on to temporary contracts. This provides no security and allows wages for the same work to be systematically cut with each new contract."

National museum, London

"Cuts in funding have led to new members of staff doing the same job for less – around 20% (average £2,000-3,000) less per annum."

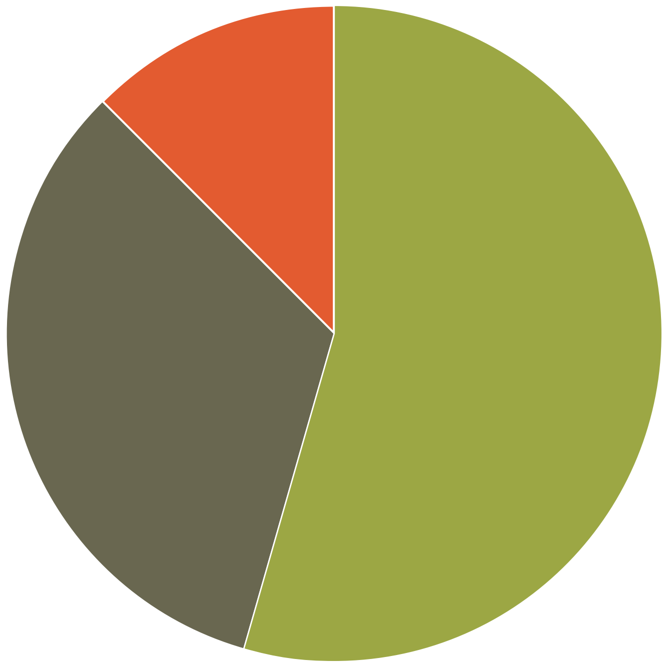
National museum, nation/region

"The collections team was bitten very hard – 50% of curators and 75% of documentation and conservation staff were made redundant a year ago. Education is most vulnerable now but exhibition [is] untouched."

Local authority museum, South of England

Figure 1.6
Changes to full-time equivalent staff as compared to last year

Decreased – 53%
Stayed the same – 32%
Increased – 12%



SECTION 1: THE PAST YEAR

Unpaid roles

Although voluntary work plays a vital role in the museum workforce, previous surveys have shown that formerly paid, skilled roles are being increasingly replaced with unpaid staff. Respondents in this year's survey were asked whether the number of volunteers and interns had increased at their organisation; though a majority (54%) said they had stayed the same this year, 32% reported that they had increased. This is a slightly lower number than previous years; 47% reported an increase in 2013 and 39% in 2012.

While many of this year's respondents acknowledged the importance of voluntary work to their organisation, some said that increased levels of responsibility are being given to unpaid, inexperienced volunteers and interns; a practice that can be both exploitative to the individual and detrimental to the museum. Others said they had less capacity to train and manage volunteers due to a lack of resources.

"Capacity continues to be an issue in terms of involving volunteers in areas they have not been used previously, such as collections."

Local authority museum, South of England

"We cannot find enough times to work with our volunteers, let alone recruit new ones."

Local authority museum, Central England

"We are unable to attract volunteers in the professional areas we need."

Independent museum, Scotland

"More volunteers mean the advice guests receive is sometimes out of date. There is friction between paid staff and volunteers covering similar roles."

National museum, London

"The museum has gone from local authority control to being managed by a charitable trust, and is now mostly staffed by volunteers."

Independent museum, South of England

"One part-time employee only supported by mainly elderly volunteers with limited skills."

Independent museum, Scotland

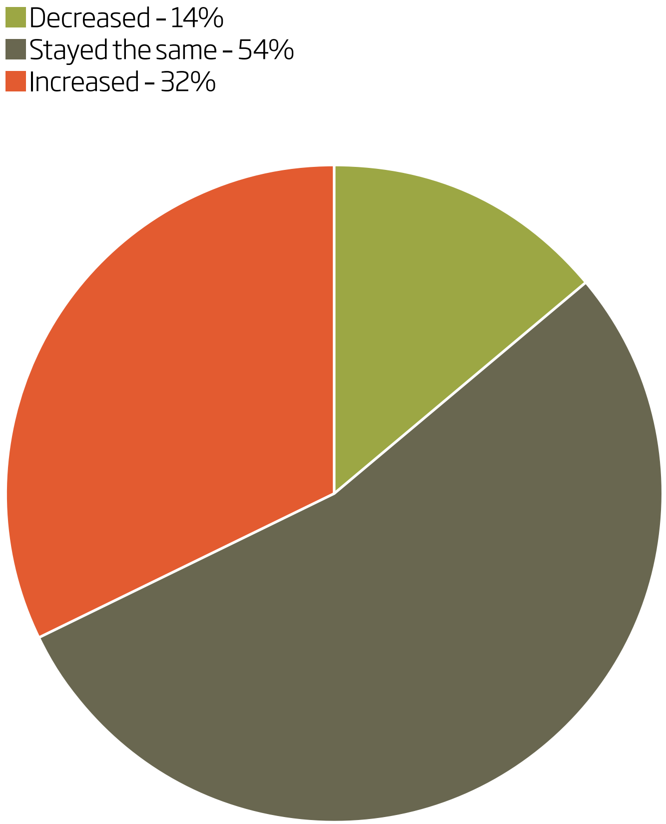
"Good standard being maintained by existing and new volunteers."

Independent museum, South of England

"It is likely, because of the volunteer input, that the range of temporary exhibitions will be reduced."

Independent museum, Wales

Figure 1.7
How has the number of volunteers and interns at your museum changed since last year?



Disposal

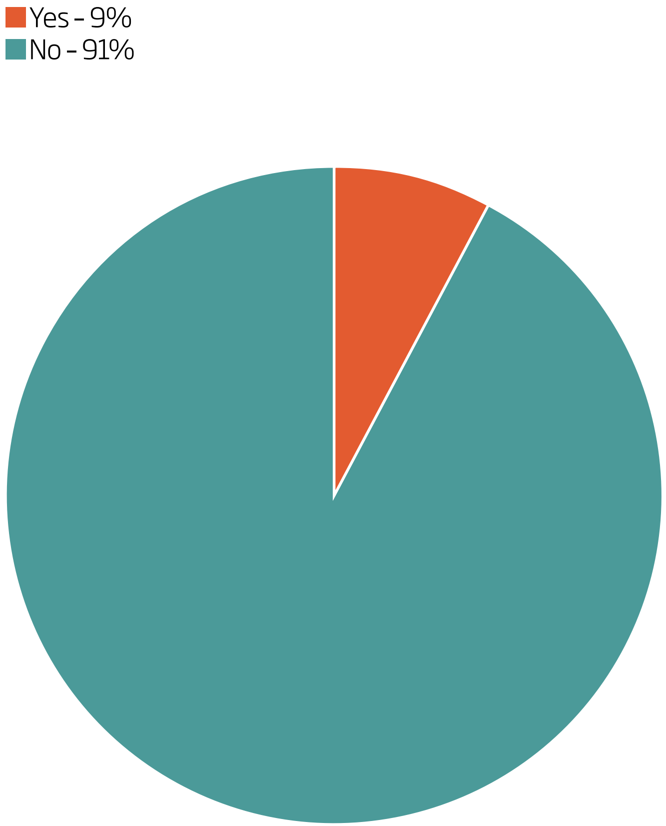
This is the first year that respondents have been asked if their museum has considered financially-motivated disposal. The question was introduced in response to a number of recent high-profile sales or proposed sales from collections that were deemed to be in contravention of the MA's Code of Ethics, and is intended to gauge whether the difficult financial climate has led to an increase in organisations considering this option. The initial results are worrying: one in 10 respondents said their museum had considered selling items for financial reasons.

Disposal is a responsible part of collections management, but there are stringent restrictions on financially-motivated disposal* because it risks damaging public confidence in museums. Sales to generate income remain rare and the fact that almost 10% of museums have considered this extreme option is significant. The MA is aware that some museums feel they have no other choice but to consider it to keep the doors open; others may have come under pressure from governing authorities to do so. The results of next year's survey will help ascertain whether this is a growing problem for the sector.

"We the operating company won't be considering financially-motivated disposal – the owners of the collections [the council] may decide to do otherwise."

Independent museum, Central England

Figure 1.8
Museums considering financially-motivated disposal in the past year



*see the MA's Disposal Toolkit:
http://www.museumsassociation.org/download?id=1075417

SECTION 2:
THE YEAR AHEAD

How will things change for museums over the coming year?

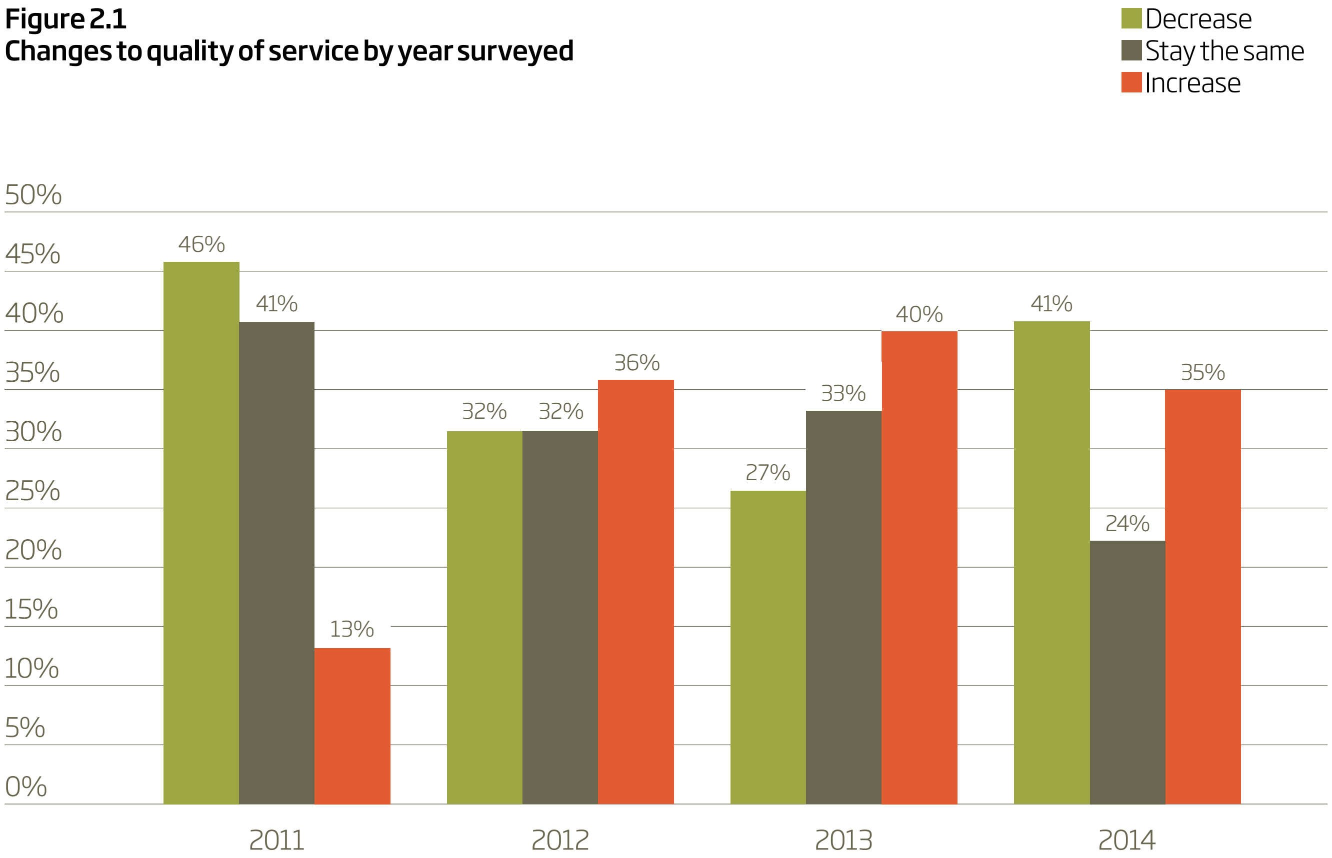
Respondents were asked to comment on the quality of service they expect to provide and areas of work they plan to focus on.

Quality of service

This year's results show a drop in confidence among respondents. Asked to consider how the quality of service provided by their museum would change over the coming year, 41% of respondents believe it will fall, making it the lowest confidence score since 2011 (previous results stood at 27% in 2013, 32% in 2012 and 46% in 2011).

It is notable that many of those reporting decreased confidence are from national and local authority museums. This drop may be the result of cumulative years of income and staff cuts; workforces are overstretched and resources have dwindled, meaning museums are finding it increasingly difficult to maintain previous standards.

Figure 2.1
Changes to quality of service by year surveyed



SECTION 2:
THE YEAR AHEAD

"There are fewer 'home grown' and, in my view, well-curated exhibitions because they are expensive and resource heavy."

National museum, nation/region

"Loss of specialist staff, less research and collections care. Unable to spread a skeleton staff any thinner."

Local authority museum, Scotland

"Overworked staff cannot work to the best of their abilities."

Local authority museum, North of England

"The facilities at the museum are becoming increasingly tired and will be difficult to maintain at the current level of provision. Research will become a thing of the past due to the loss of facilities."

National museum, nation/region

However, 35% of respondents (of all types) are confident that the quality of service will improve. Some say new ways of working and changing business models have brought with them new opportunities, while others attribute their confidence to the dedication of staff. Many, however, say they will have to reduce the quantity of services they provide so as to maintain standards of quality.

"Lots of plans and new opportunities ahead! It really is a case of when the 'going gets rough, the tough get going'."

Local authority museum, Wales

"If anything, the quality of service has increased since the trust took over, with longer opening hours, better marketing and more community engagement."

Independent museum, South of England

"Quality will remain high but likely to be doing less activity than now."

Local authority museum, North of England

A number of respondents say they are concerned that the growing pressure to focus on income generation may undermine their museums' core values and ability to engage with communities of all backgrounds.

"Relentless pressure to increase income will distort our mission – we will only be working with people who can afford us. Social inclusion is dead!"

Local authority museum, Central England

"In working on funding applications, focus is taken away from engagement projects and responding to public enquiries."

Local authority museum, Central England

"Our ethos is about sharing our collections and not seeing them as an income generation source."

Local authority museum, South of England

"We will start charging for children on top of an already very high admission price for adults – this will turn us from a family-friendly museum to a special interest one, undoing years of hard work."

Other museum, Central England

"The need for funds is continually compromising content in exhibitions where individual supports raise objections. This is particularly prevalent in exhibitions covering more contemporary content."

National museum, London

SECTION 2:
THE YEAR AHEAD

Areas of work

The survey asked respondents to comment on areas in which their organisation will be doing more, less or the same level of work over the coming year. As with previous surveys, this year's results show that by far the biggest priorities for respondents are fundraising and income generation, with 79% and 65% respectively saying they will focus more on those areas in the coming year.

At 46%, the next most popular priority is creating better places, (i.e. strengthening communities by working in partnership with other organisations). Over one third (35%) of respondents say they will focus more on encouraging participation (i.e. involving people and communities in the work of the museum), and 33% say they will do more learning and outreach. Respondents also largely intend to maintain the same levels of work they are doing to promote social justice and engage with contemporary issues.

These results indicate that, encouragingly, many museums are prioritising public-facing work and are committed to increasing their impact among individuals and communities to ensure sustainability; an ethos that has been promoted by the MA's ongoing Museums Change Lives campaign.

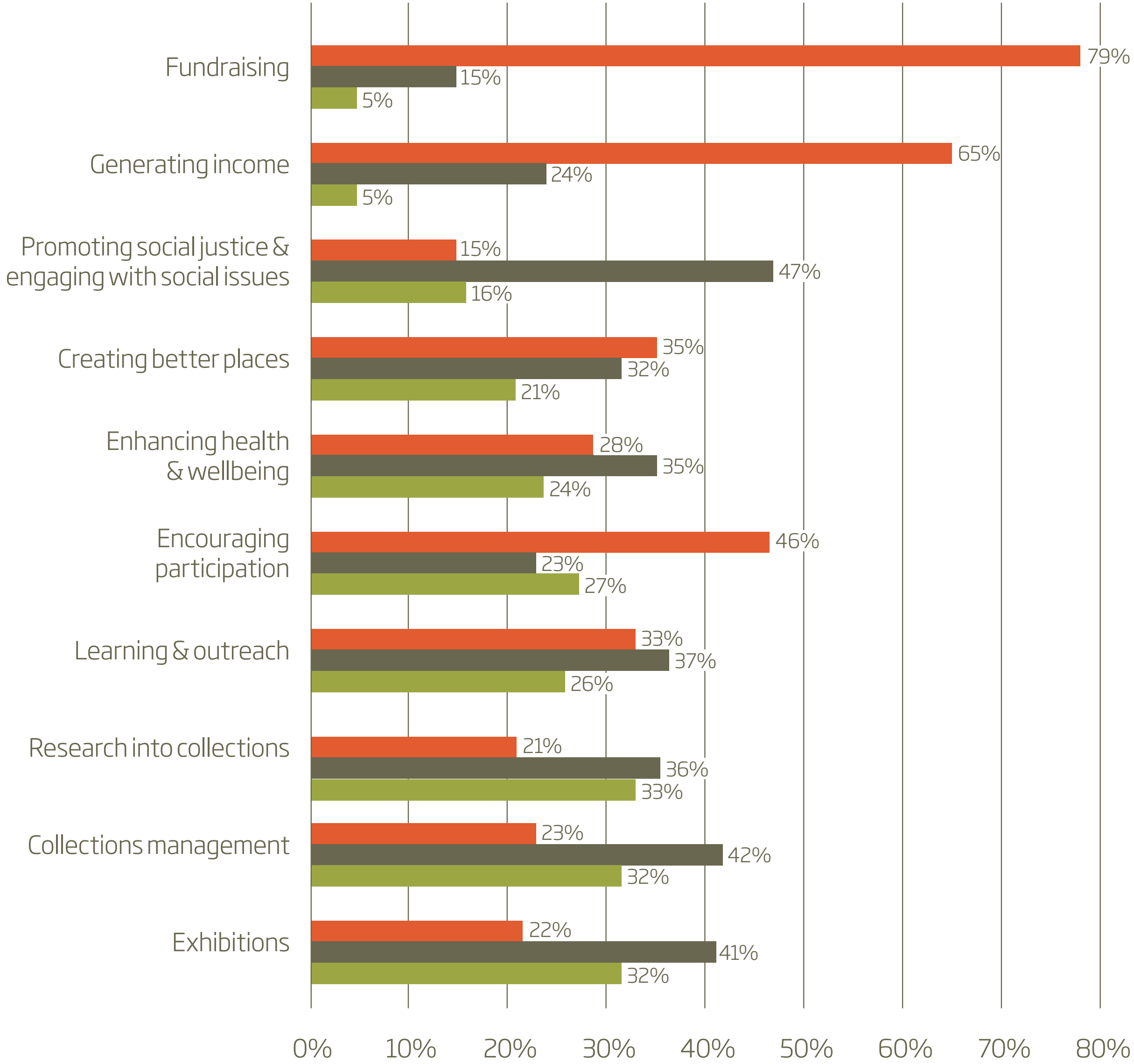


Figure 2.2
Areas of work museums will be focusing on in the coming year

Decrease
Stay the same
Increase

SECTION 2: THE YEAR AHEAD

However, a significant number also report that they will be doing less in those areas. Of those, 32% will be doing less exhibitions, 27% will be doing less to encourage participation, 26% will be doing less learning and outreach, and 24% will be doing less to enhance health and wellbeing. These results, along with comments from respondents, indicate that for almost every museum that is prioritising public services and engagement, there may be one that is unable to do so due to funding constraints or a focus on more commercial priorities.

The findings also suggest that museums' behind-the-scenes work is suffering; 33% say they will be doing less research into collections, and 32% say they will be doing less collections management. The loss of specialist staff, and the prioritisation of resources on the frontline, may mean that many museums have less capacity to carry out the vital work they do in these areas.

"Rather than have two or three temporary exhibitions through the year we will have one major one in the summer."

Local authority museum, Scotland

"Because of stronger productivity and an increase in fundraising we will be able to add more educational programing."

Other museum, North of England

"We will have to focus more effort on income generation at the expense of our outreach and public engagement."

Local authority museum, Wales

"We have no choice but to maintain collection care but our public face will have to suffer."

Independent museum, Scotland

"The cuts in the members of staff will affect our work and services; we will not have the capacity to do proper collections management, curation, learning programmes."

Local authority museum, South of England

"Danger of increasing corporate centralisation destroying any capacity to increase income or develop relevant services to support health and wellbeing/tourism or community agendas."

Local authority museum, North of England

SECTION 3: THE NEXT THREE YEARS

How will things change for museums in the longer term?

Respondents were asked to comment on how they thought things would change at their museum over the next three years.

If last year's survey showed a renewed feeling of hope among some respondents, the majority of comments this year reveal a greater sense of uncertainty or pessimism about the future. A number of respondents feel that their museum cannot absorb any more cuts and comment that they are unsure if it will still be open in three years' time. Others predict that core museum activities, including public services and collections work, will increasingly suffer. The majority of respondents citing these views represent local authority museums.

"I don't even know if the museums service will still exist in three years' time, as it is a local authority service."

Local authority museum, Scotland

"I hope the museum will still be open in three years' time, but as we have lost nearly 40% of our budgets over the last three years, it's hard to be optimistic.

Local authority museum, Central England

"Fewer staff with less time means fewer applications for funding can be done, and fewer projects can be undertaken. Fewer volunteers can be trained or supervised and the collections will slowly rot because there will be no-one left who cares."

Local authority museum, Scotland

"All the 'shaving' that can be done has been done, so now whole services are in danger of being cut."

Local authority museum, Wales

"Dramatic reduction in core resources, seasonal or other closures or reductions in hours, reduction in areas of services offered as staff reductions limit service to opening sites and little else."

Local authority museum, North of England

"It's difficult to see a positive future. The damage done over the last few years will take at least a decade to put right."

National museum, nation/region

Many respondents feel that their museum's accessibility and engagement with the public will also diminish; a number cite fears that the growing focus on generating and maximising income may create barriers for some audiences. Others predict that morale in the workforce will continue to drop due to increased fundraising pressure and loss of staff capacity.

"Increased use of museum as a venue for the rich and elite. We will see less working-class people, with the museum's focus being on income generation rather than public outreach programmes."

National museum, nation/region

"We will have to maintain a constant income stream through grant funding, retail, hire, education etc. We may be forced to bring back an admission charge."

Independent museum, South of England

"Visitors will be more monetised. Corporations and venue-based fundraising will be pushed."

National museum, London

"We are designated 'non-statutory and non-essential', so are definitely in the firing line.... There is a lot of uncertainty and despondency within the staff."

Local authority museum, Wales

SECTION 3:
THE NEXT THREE YEARS

"The future looks bleak. I have been working here for nearly two years trying to start a career but I no longer think there is one here."

National museum, nation /region

However, there are more positive notes. Respondents are committed to becoming resilient, and many are hopeful that their efforts to establish entrepreneurial models, new income streams and partnerships will pay off. Others are moving ahead with ambitious capital projects and grant applications. A number of respondents are hopeful that a change in their governance model will bring new opportunities.

"The museum will raise its profile, become involved in more activity and have a much better focus on aims and objectives"

Independent museum, Central England

"We are aiming at collaborative work with other cultural and education organisations; working in partnership we believe will be beneficial for all the parties involved."

Local authority museum, South of England

"Increase visitor numbers by good marketing. Increase membership of museum Friends."

Independent museum, South of England

"Museum is seeking to regenerate and redevelop the physical infrastructure of the building, together with associated volunteer recruitment and activities to engage more of our local community."

Independent museum, Wales

"A focus on partnerships and exploring new models of working will play a key role. Our work with schools will grow significantly through outreach, offsite and digital activities."

National museum, London

"We are developing a large Heritage Lottery Fund bid, so the next three years will be ones of great upheaval and change. And excitement!"

Local authority museum, Central England

"We probably will be well on the way to trust status by then... It wouldn't be a disaster as long as funding agreements were realistic."

Local authority museum, South of England

This year's results, and the cumulative findings of the previous three cuts surveys, reveal that while many museums are surviving – and even thriving – in the difficult financial climate, for some, a crisis may be looming. As one of this year's respondents points out, museums hold their assets in trust for society and have a core remit to serve all parts of the community, so their capacity to raise income from commercial sources - without compromising their founding values - may be limited. The general election next year could spell more upheaval in public funding; the findings of this survey indicate that further cuts to public investment could set museums back at a time when many are transitioning to new business and governance models, or even lead more museums to resort to financially-motivated disposal, which risks damaging the public's trust in the sector. For other museums, particularly some local authority-run services, any additional drop in funding may push them past breaking point.

"We are in the quiet before the storm."

Local authority museum, Central England

"We will need some radical change to preserve the service."

Independent museum, Wales

"The most bitter effects of the cuts won't be felt till further downstream – until after the general election of 2015."

Independent museum, Central England

MUSEUMS ASSOCIATION

November 2014

Museums Association
42 Clerkenwell Close
London EC1R 0AZ
www.museumsassociation.org
T: 020 7566 7800