MUSEUMS ASSOCIATION

MUSEUMS IN THE UK 2018 REPORT

February 2018

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FOREWORD

We live in interesting and challenging times. As communities grapple with issues such as cultural and national identity and the shifting sands of political and demographic change, museums and the collections we care for can help us to think about our place in the world and deal with the pressing concerns of contemporary society.

2017 opened with the inauguration of Donald Trump as president of the United States and a threatened travel ban. Racism and intolerance increased over the course of a year which closed with a heightened awareness of discrimination and inequality expressed through campaigns such as Me Too.

The past year has also seen some interesting developments in museum policy across the UK. In Scotland the government is consulting on a new culture strategy; in Wales work towards a new museum strategy is well underway and in England the Mendoza Review, which called for a joined-up approach to funding from government, was published. The Museums Taskforce has continued its work and has identified collections, relevance and funding as key challenges and opportunities for the sector.

There is an appetite for discussion and debate in the sector and a realisation that in order to inform this debate we need good data and a better understanding of the true state of museums in the UK. This report is a step towards achieving that and gives a snapshot of the current health, and concerns, of the museum world.

The report captures some key statistics and trends and points to a sector that is increasingly engaging with local audiences and developing relationships with communities in order to better understand and share collections.

The Museums Association will use the information in this report to make the case for museums and the vital role that we can play in enhancing health and wellbeing, creating better places for us for us to live and work and providing space for debate and reflection over the course of 2018.

Sharon Heal
Director, Museums Association

INTRODUCTION

The Museums Association's annual Museums Survey is designed to help gain an insight into key indicators of museums' performance, such as visitor numbers, financial performance, school visits, targeted project work, and employment and volunteer figures. It is also an opportunity for museums to voice their hopes and fears for the year to come.

This year's survey has gathered a rich and varied set of data and comments from museums across the UK. The results reflect many of the trends that we have seen develop in the sector since the beginning of the decade – the damaging impact of austerity on local authority and former local authority museums; the loss of museum staff; the hollowing-out of skills and expertise in museums; growing maintenance and documentation backlogs; and the difficulties faced by many museums that have moved recently to independent status.

This year sees uncertainty over Brexit added to the concerns for museums, as many in the sector fear for the future of European colleagues in UK museums, EU funding, and the future of cultural and scientific exchange with European museums.

But there are also findings that reflect growing positive trends in the sector. The majority of museums report growing or stable visitor numbers and many are hoping to capitalise on the weakening of the pound by attracting more overseas visitors. Elsewhere, museums report growing levels of work targeted at specific communities and groups, such as BAME and LGBTQ+ groups, and on specific themes such as health and wellbeing. They appear to be prioritising work with schools and educational organisations, as well as maintaining high quality events programmes that are crucial in making museums valued by wide audiences.

The role of funders and sector bodies must be to respond to the issues raised by museums throughout this report, and to support them in their efforts to increase their positive social, cultural and economic impacts, so that museums across England, Scotland, Wales and Northern Ireland continue to thrive and develop into the next decade.

KEY TRENDS

Audiences and Visitors

- Overall, museum attendance was healthy – 46% of museums said that their visitor numbers had increased in 2016–17 compared to the previous year, although almost a third (32%) said that they had decreased.
- A significant number of museums (11%) reduced opening hours.
- A small number of museums (4%) introduced new admission charges.

Funding Issues

- There is continued pressure on local authority museum funding: local authority museums (39%) and independent museums formerly run by local authorities (54%) were the most likely to report reduced overall funds.
- Large proportions of these types of museum also experienced a decrease in regular public income (51% of local authority museums, and 58% of independent former local authority museums).
- But many museums reported relatively healthy finances – 37% said that their overall funds had increased, and 35% reported that they had stayed the same.

Public-Facing Activities

- Museums' public engagement is strong, with a strong tendency for educational, public events and temporary exhibitions activity to either increase or remain the same.
- Museums are engaging with a wide range of groups, and not only traditional ones – for example almost half work on health and wellbeing projects (46%).

Workforce

- In the sector overall, the number of museums that had undergone workforce cutbacks (21%) was balanced by those that had increased their staffing levels (20%).
- But local authority museums were much more likely to have made staffing cuts (34%) than grown their workforce (6%).

Brexit

- Overall, 4% of the museum sector workforce are non-UK EU citizens.
- The museums most likely to employ people from this group were in Northern Ireland (7%) and Scotland (6%).
- Over a third of museums could have their staffing arrangements disrupted by Brexit.
- The museum sector has identified many risks relating to Brexit, alongside a smaller number of opportunities.

1 BACKGROUND TO THE SURVEY

Between September and November 2017, museums were asked to complete an online survey on their performance and activity during the financial year 2016/17 relating to the following topics: type of museum; visitor numbers and engagement; museum finances; volunteers and staff; public benefit; challenges and opportunities for the future; and Brexit.

While some of the data is similar to that of our previous 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, 308 respondents completed the survey, representing 435 museums. 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 roughly 17% of the total number of museums. This is a healthy sample size that indicates that UK museums are well represented by the survey.

The types of museum that responded are also broadly reflective of the make-up of the sector, 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. There were survey respondents from national museums, university museums, military museums, National Trust, National Trust for Scotland and Historic Scotland properties, and 'other' museums.

1 BACKGROUND TO THE SURVEY

Fig. 1.1
Geographic spread

- North of England - 26%
  North East, North west, Yorkshire and Humberside
- Central England - 23%
  East Midlands, West Midlands, East of England
- South of England - 30%
  South East, South West, London
- Isle of Man - 3%
- Northern Ireland - 3%
- Scotland - 9%
- Wales - 6%

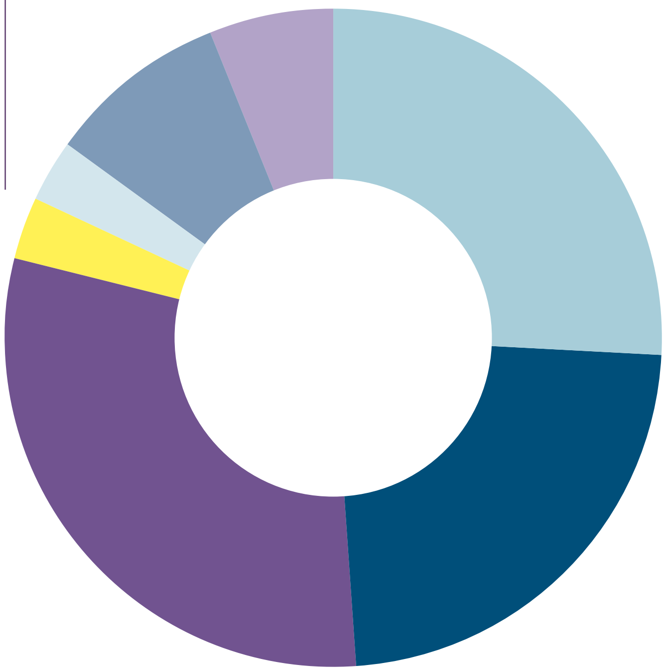
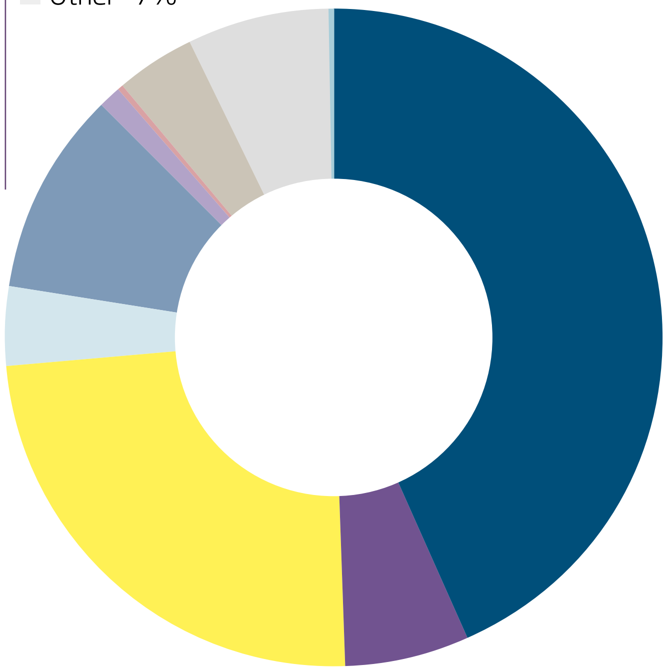


Fig. 1.2
Type of museum

- Historic Scotland - 0.2%
- Independent - 43%
- Independent former local authority- 6%
- Local authority - 24%
- Military - 4%
- National - 10%
- National Trust - 1%
- National Trust for Scotland - 0.2%
- University- 4%
- Other - 7%



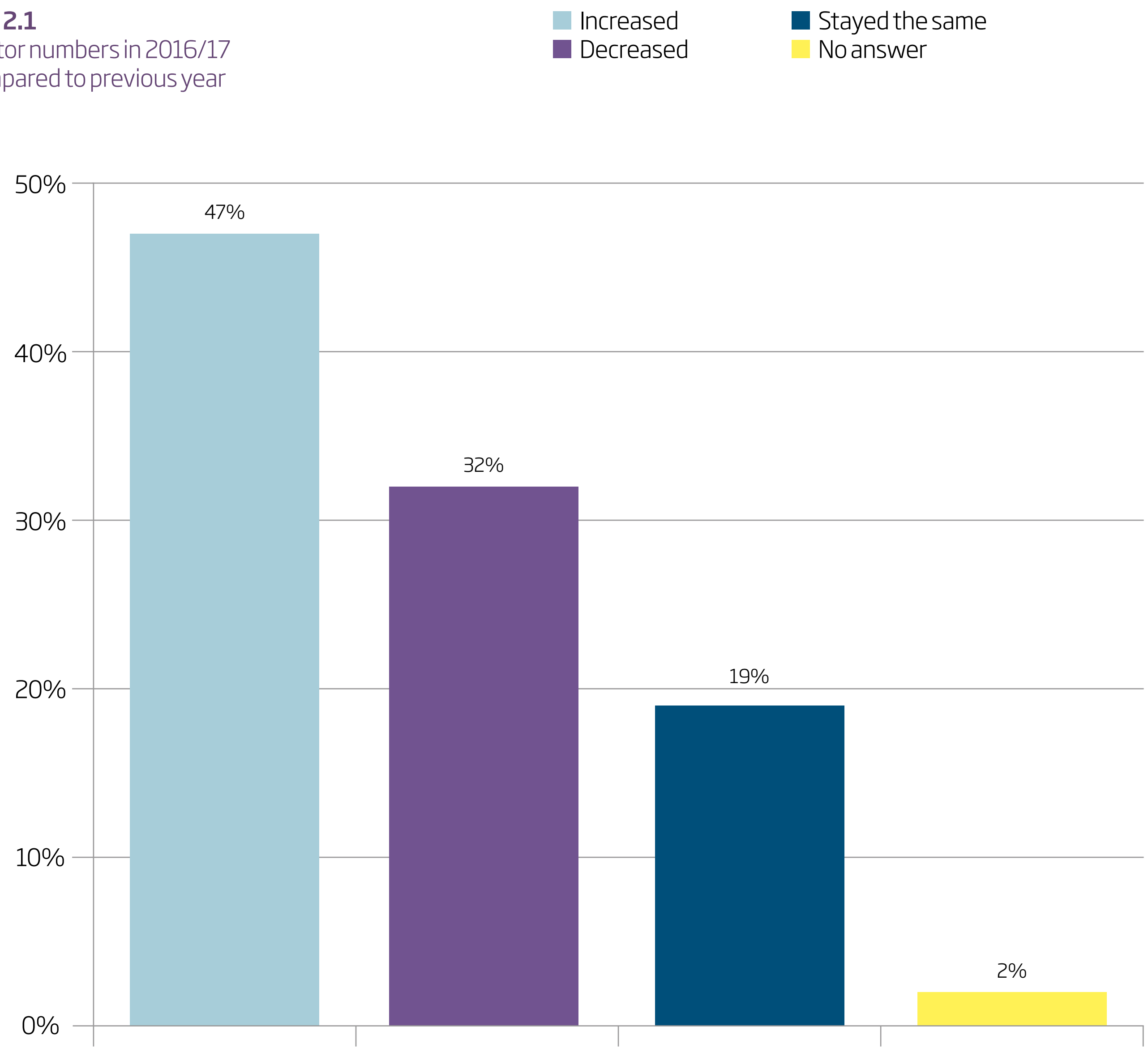
2 MUSEUM OPERATIONS

2.1 Visitor figures remain healthy

The survey results suggest that museum attendance remains healthy. Overall, 47% of museums said that their visitor numbers had increased in 2016-17 compared to the previous year, while 32% said that they had decreased. 19% reported that visitor numbers had remained the same.

These findings broadly correspond to the long-term upwards trend in museum visits found in the Taking Part survey run by the Department for Digital, Culture, Media and Sport (DCMS). According to this research, 52% of UK adults go to a museum every year, an increase of ten percentage points from the level of 42% in 2005-6.

Fig. 2.1
Visitor numbers in 2016/17 compared to previous year



2.2 Admission charges on the rise

The survey found that more museums charge admission than do not. Overall, 52% of responding museums charge for entry, and 46% do not.

All the museums from the National Trust, National Trust for Scotland and Historic Scotland which responded to this question said that they charged for entry.

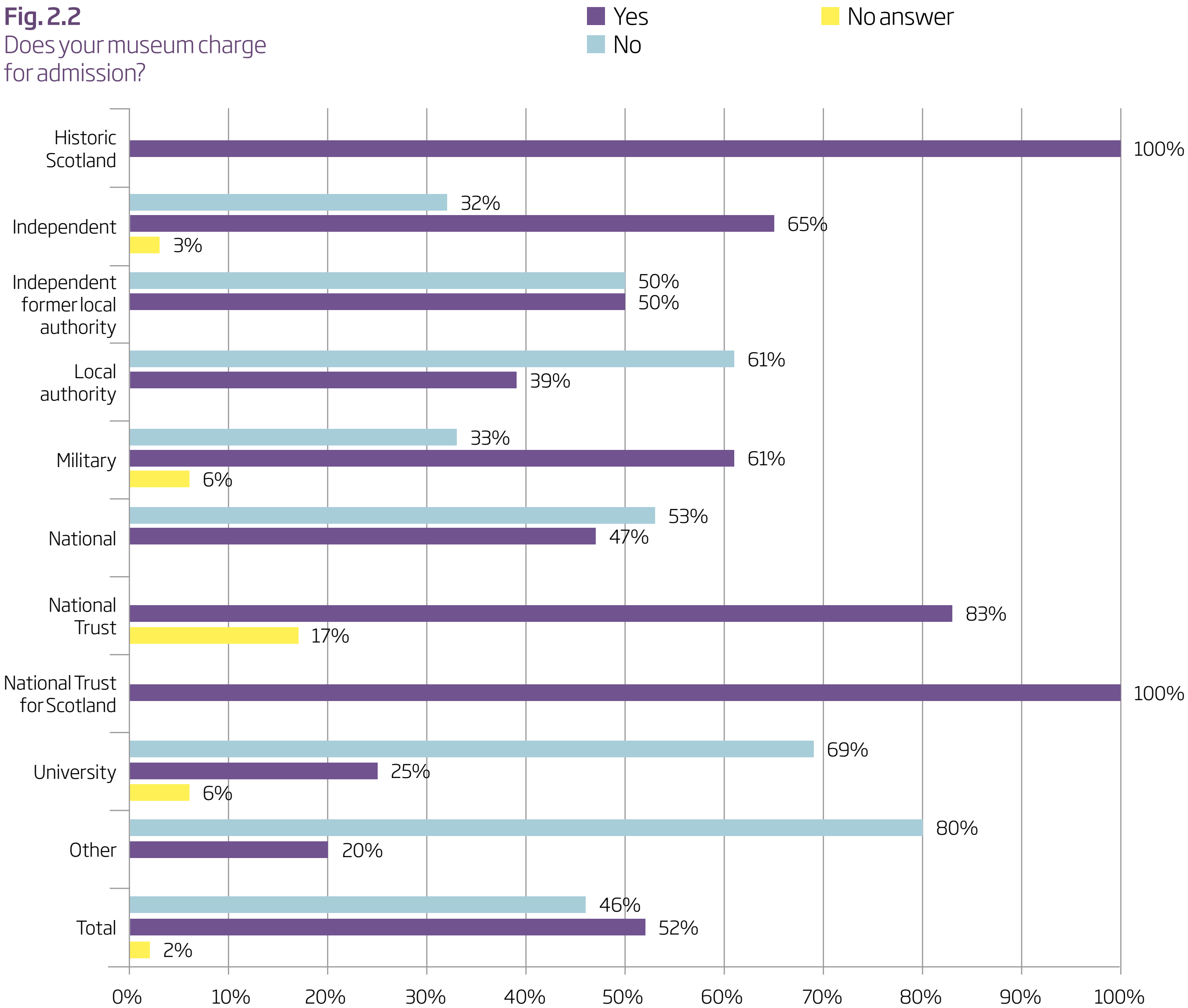
After these, the type of museum most likely to charge for entry was independents, with 65% charging for admission. These were followed by military museums (61%) and independent museums formerly run by local authorities (50%).

The results suggest that there has been a gradual increase in the number of museums charging for entry. 4% of responding museums said that they had introduced a new admissions charge in place of free entry in the past year.

But although charging is clearly an opportunity to increase revenue, museums need to consider the possibility that it may also cause visitor numbers to fall.

"In April 2017 the museum introduced a charge for visitors and visitor numbers have reduced significantly."
Independent Museum, Scotland

Fig. 2.2
Does your museum charge for admission?



2.3 Governance – moves to trust status continue

In recent years, a steady stream of museums have moved outside of local authority control to be run by independent trusts. The survey confirmed that this trend is continuing, although at a relatively low rate. 2% of responding museums (10 museums) said that they had moved to trust status in the past year.

Anecdotally, some independent museums reported that they had benefited from the greater operational flexibility enabled by this model. Others stressed that time and continued local authority support – both financial and organisational – was required to make the most of this opportunity.

"Being an independent means we can, and do, open in the evenings for group visits. This has proved to be extremely popular and has generated a good deal of publicity for the museum."
Independent Museum, East Midlands

"We are moving to an independent trust in April 2018. The challenges will be getting a deal that will allow freedom to operate in an enterprising way, and getting a financial settlement that will give the trust time to innovate and develop new income streams to replace the declining budget available to local authorities."
Local Authority Museum, South England

"As of September, we are now part of an employee-led mutual organisation. We are definitely the poor relation in comparison to Leisure and Libraries. We need to up the service profile as the new board and management really don't have a clue what I do – or more importantly, what running a museum service actually entails."
Independent former Local Authority Museum, Wales

"It is expected that next year our funding will fall by 33%, and then the year after by a further 33%. This would decimate the charitable trust, resulting in the closure of 1 or 2 museums."
Independent former Local Authority Museum, East Midlands

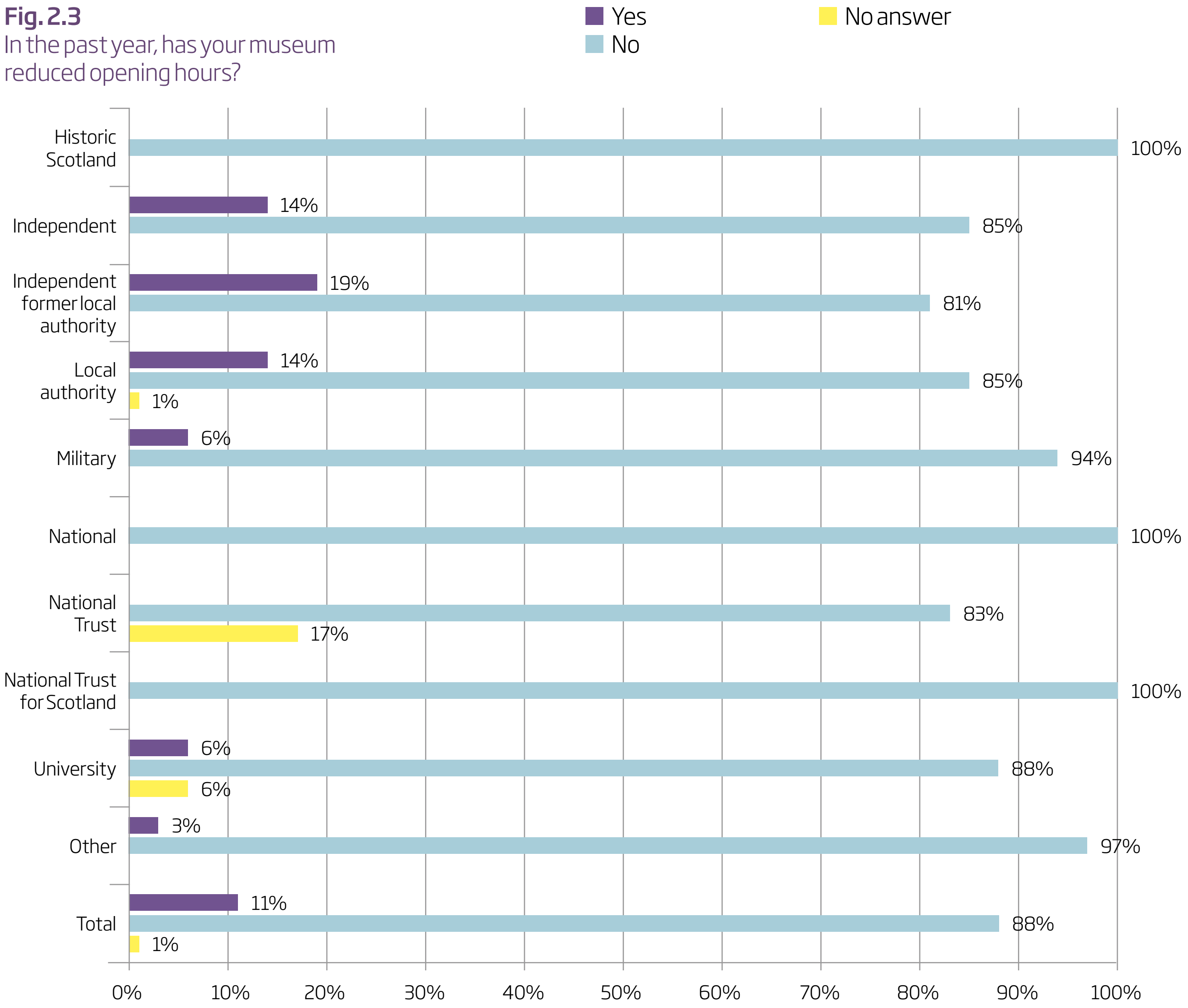
"Our initial transition period for moving to a trust will be ending in March 2018, so the challenge now is to wait on a pending funding application to support us for the next 3 years as we work to become self-sustainable."
Independent former Local Authority Museum, Wales

2.4 Reduced opening hours

Pressure on resources appears to be driving a reduction in opening hours in some parts of the sector. A significant proportion of museums (11%) said that they had reduced opening hours in the past year.

The museums most likely to have reduced opening hours were independent former local authority museums, 19% of which had cut hours. Following these were independent museums, and local authority museums. 14% of each of these types of museum had cut their opening hours.

Fig. 2.3
In the past year, has your museum reduced opening hours?



3 FUNDING

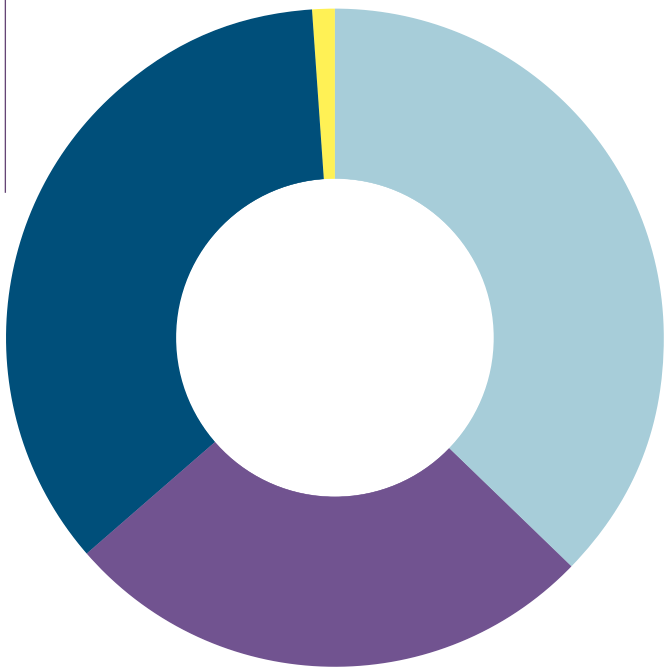
The picture of museum finance revealed by the survey was complex. While many museums reported healthy finances, there are reasons for concern in key parts of the sector.

3.1 Overall income – local museums continue to struggle

37% of museums said that their overall funds had increased in the past year, with just over a quarter (26%) saying that they had decreased, and 35% reporting that they had stayed the same.

Fig. 3.1
Overall funds in 2016/17 compared to previous year

- Increased - 37%
- Decreased - 26%
- Stayed the same - 35%
- No answer - 1%

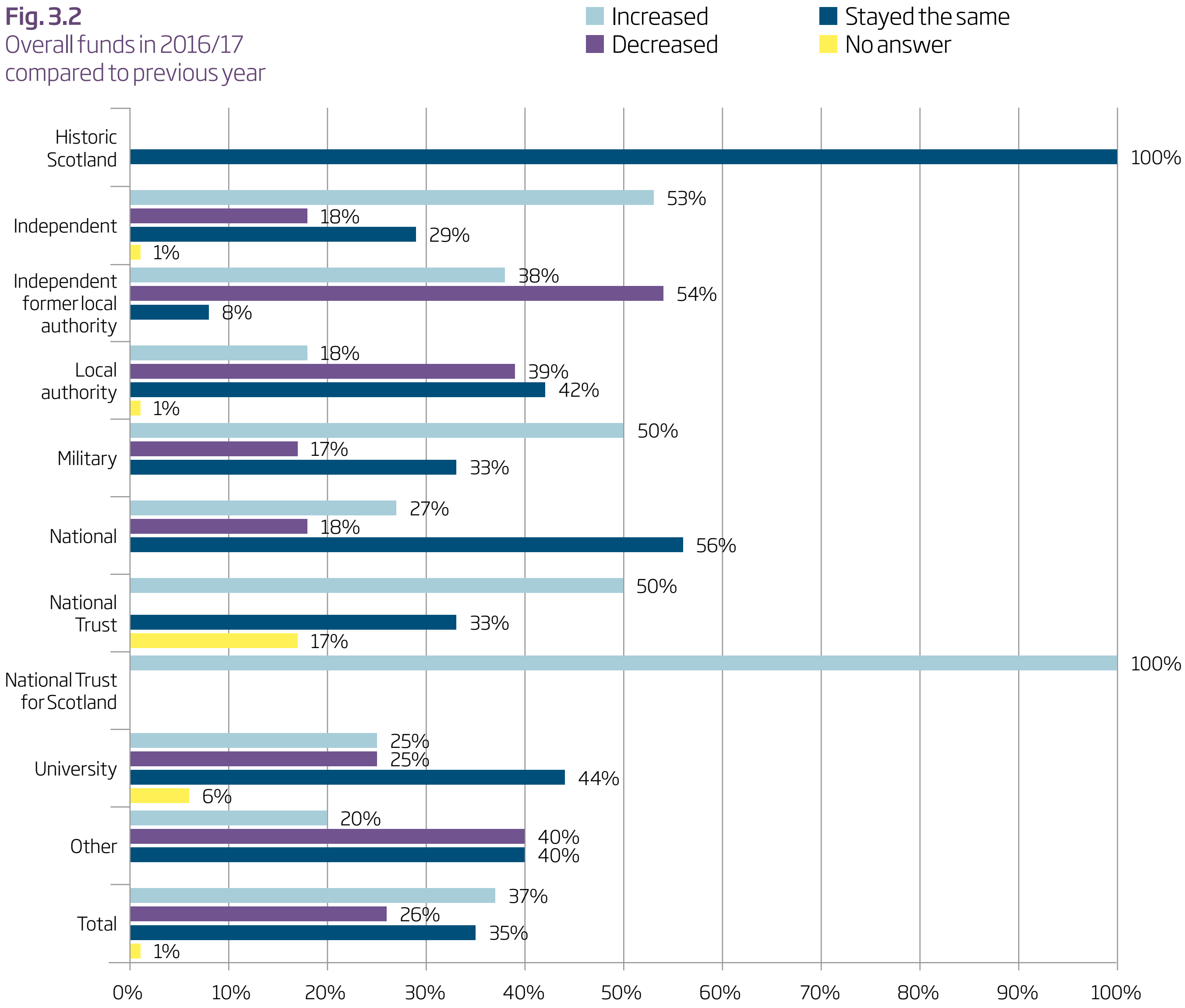


But looking at the breakdown of results by type of museum indicates that financial difficulties are being experienced by local authority-funded museums in particular.

39% of museums run by local authorities said that their overall funds had decreased in the past year, compared to 18% saying these had increased, and 42% reporting no change.

Many independent museums formerly run by local authorities also reported funding difficulties, with more than half (54%) saying that their overall funds had decreased. But on the other hand, a large proportion (38%) said that the amount had increased. Only 8% said that there had been no change in their overall level of funding.

Fig. 3.2
Overall funds in 2016/17 compared to previous year



This picture ties with figures published by the Department of Communities and Local Government, which show that local authority funding of museums in England has declined by 31% in real terms since 2010.

53% of independent museums (a category which includes large open air museums such as Beamish Museum and the Black Country Living Museum as well as many smaller institutions) said that their overall funds had increased. 18% of independents said their overall funds had decreased, and 29% reported no change.

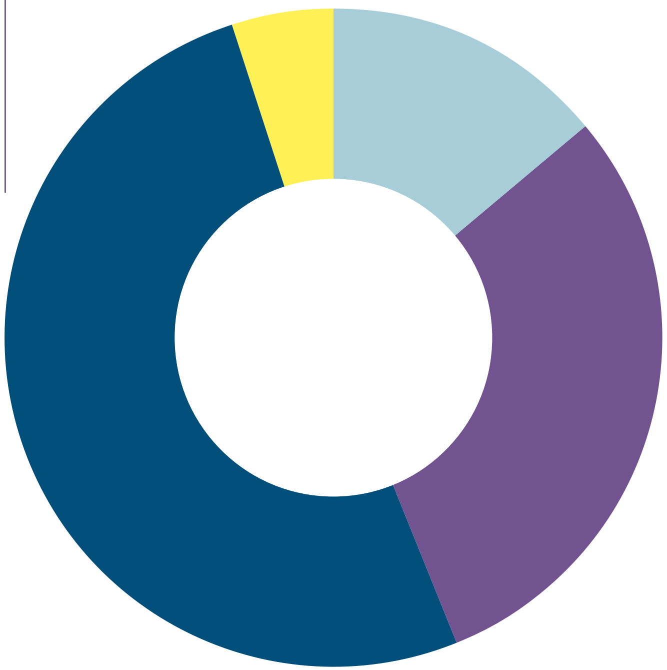
The financial fortunes of national museums also appear to have been broadly positive. 27% said they had experienced an increase in overall funds, and 56% said there had been no change. 18% of nationals said that their overall level of funds had decreased.

3.2 Public income – one third of museums report a drop

The survey also asked about museums' regular public income (this covered all public revenue funding, such as money received from a local authority or higher education institution). Overall, almost a third (30%) of museums reported a drop in public income. About half (51%) said it had stayed the same, and 14% said it had increased.

Fig. 3.3
Regular public income in 2016/17 compared to previous year

- Increased – 14%
- Decreased – 30%
- Stayed the same – 51%
- No answer – 5%



Here again, it was museums run or formerly run by local authorities that had experienced the biggest cuts. 51% of local authority museums, and 58% of independent former local authority museum, reported a decrease in regular public income.

"The council has to find more cuts this year so reduction in funding is probable. The museum has been asked to save 20% of its running costs."
Local Authority Museum, South England

"No increase to local authority funding presents a challenge to find other forms of income and increase income from existing revenue streams, as costs continue to rise incrementally despite cost saving measures."
Independent former Local Authority Museum, South England

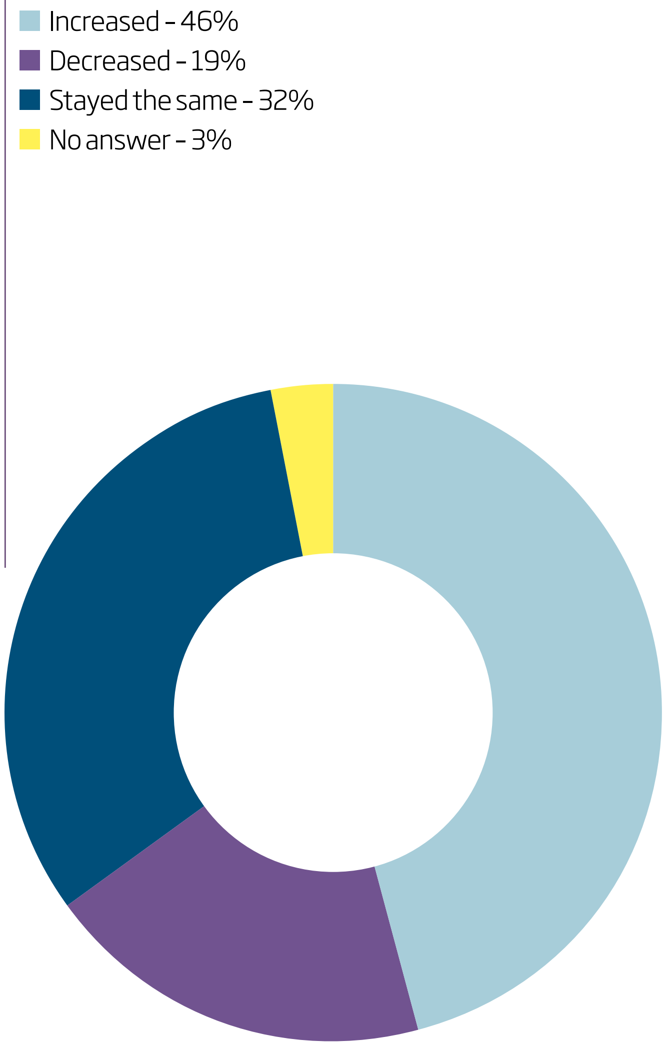
"We are facing the complete withdrawal of local authority support by 2020 (it's already only 10% of what it was three years ago)."
Independent former Local Authority Museum, Wales

"Decreasing funding and pressures on local authority budgets create pressure on us when trying to maintain the building and particularly the grounds (car park, footpaths etc.)"
Local Authority Museum, North West England

3.3 Earned income is increasing

The results also suggest that many museums are boosting their income from sources such as cafes and shops. Overall, 46% of museums said that their earned income had increased. About a third (32%) reported that it had stayed the same, with 19% experiencing a fall in earned income.

Fig. 3.4
Earned income in 2016/17 compared to previous year



69% of independent museums formerly run by local authorities said that their earned income had increased. The percentage is significantly higher than the proportion of local authority museums (43%), military museums (44%) and independent museums (47%) reporting an increase in earned income, and may be related to the additional freedoms that newly independent museums have to generate income, including via charging for entry.

The results on earned income for national museums revealed a mixed picture. More than half (56%) said that their earned income had increased, but another large proportion (42%) said that it had decreased.

"A major challenge is to increase the amount of income we raise ourselves through admissions and extra activities. We will focus on developing our new Friends membership and Adopt an Object schemes, and in terms of increasing admissions by creating an exciting and attractive exhibition programme."
Independent Museum, North East England

3.4 Grants and donated income remain robust

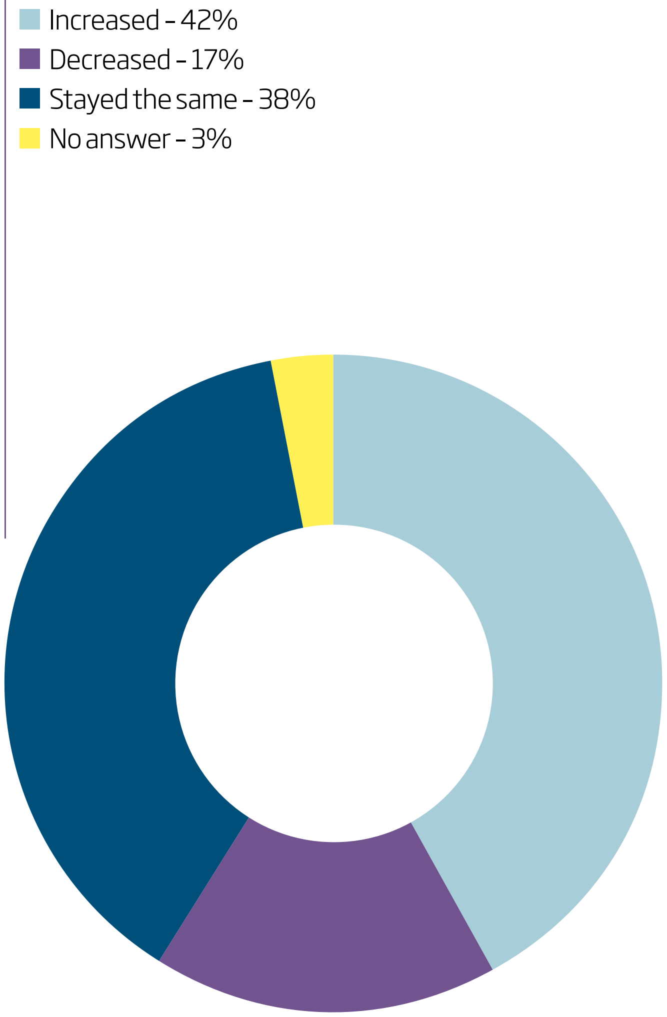
Museums continued to benefit from grants and donated income. Respondents were asked about their income from grants, donations and philanthropic giving (including all private donations and non-capital funding from the Heritage Lottery Fund).

Overall, 80% of museums said that their income from these sources had either increased (42%) or stayed the same (38%).

This was another area where former local authority museums appeared to be doing better than those within local government. 50% of independent former local authority museums said that their income from grants and donations had increased, compared to 28% of local authority museums.

About half of independent museums (47%), national museums (53%) and military museums (50%) also said they had increased income from these sources.

Fig. 3.5
Grants, donations and philanthropy in 2016/17 compared to previous year



4 WORKFORCE

Museum workforce issues are coming into increasingly sharp focus, with cuts and continuing low pay creating concerns in the sector around retention, staff wellbeing, diversity, and a hollowing-out of expertise.

4.1 Paid staff

Overall, museums responding to the survey said that they employed an average of 13 full time equivalent paid staff in 2016–17. This rose to an average total head count of 19 when the number of seasonal and casual staff (at its peak in the year) was included. Clearly this figure varies widely between large national employers and small local museums.

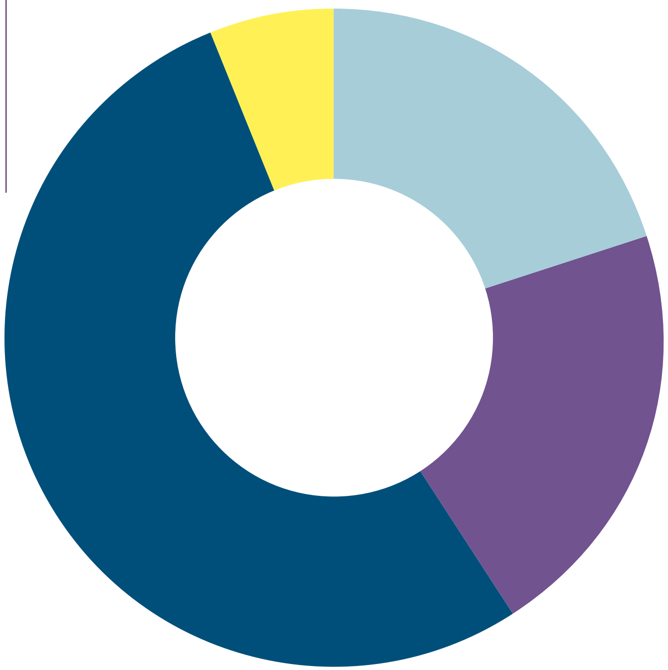
Staffing cuts balanced by growth

The survey also asked museums whether their level of full-time equivalent staff had increased or decreased. Results suggest that across the sector, the number of museums cutting back their workforce was balanced by those taking on more employees. Overall, 20% of museums said their number of full-time equivalent staff had increased, while 21% reported a decrease. About half (53%) said there had been no change.

Because many of the museums reporting cutbacks in staff are larger employers, this finding is consistent with a shrinking overall workforce in the museum sector.

Fig. 4.1
Number of full-time equivalent staff in 2016/17 compared to previous year

Increased - 20%
Decreased - 21%
Stayed the same - 53%
No answer - 6%



Local authority museums making cutbacks

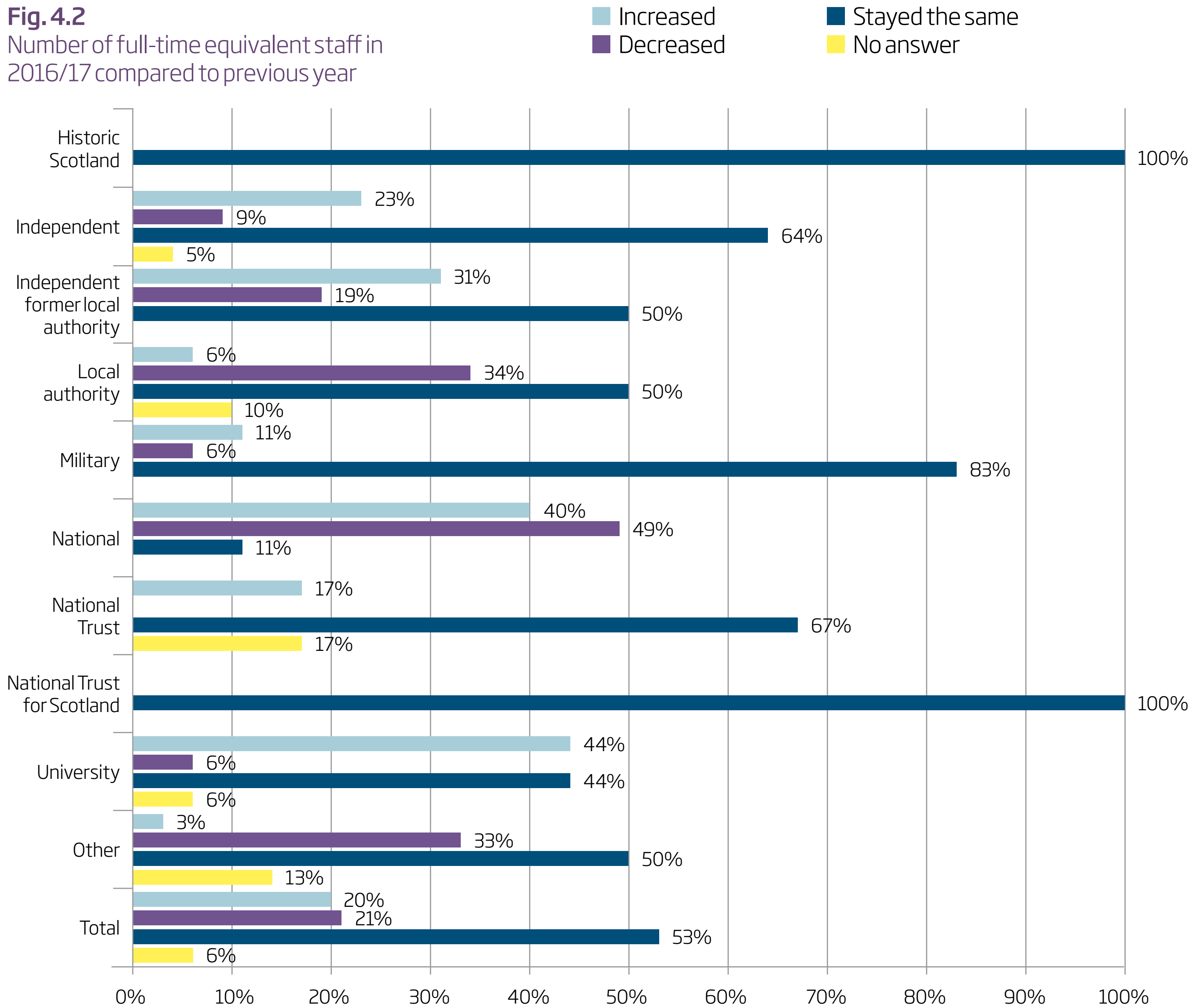
This was another area where the results underline the challenge facing local authority museums: 34% of this type of museum said that their number of full time staff had decreased, compared to only 6% for whom it had increased.

In contrast, more independent former local authority museums said their number of full time equivalent staff had increased (31%) than said it had decreased (19%).

Independent museums that have always been separate from councils also reported an increase in full time staff. 23% said the level had increased, compared to 9% for whom it had decreased.

A large proportion of university museums (44%) reported an increase in staffing levels. At national museums there were large numbers of both those who said staffing levels had increased (40%) and that they had fallen (49%).

Fig. 4.2
Number of full-time equivalent staff in 2016/17 compared to previous year



"The Living Wage, Apprenticeship Levy, and automatic pension enrolment are all additional costs, and income is not rising at the same pace. Salaries are likely to inflate again if free movement of people is capped as supply and demand will be skewed."
Independent Museum, West Midlands

"We are experiencing further budget pressures, with local authority demands for further savings, and a reduction of the block fee allocated to the trust to run services on behalf of the council. Further reduction in staffing levels is likely."
Independent former Local Authority Museum, Scotland

"Resourcing is a major issue for the museum. A recent staff restructure intended to save costs has resulted in a lack of front-line staff to cover our basic opening hours. This has meant that we are relying more than ever on agency staff to keep our buildings open."
Local Authority Museum, London

4.2 Volunteers

The average number of volunteers (including trustees) at museums in 2016-17 was 46.

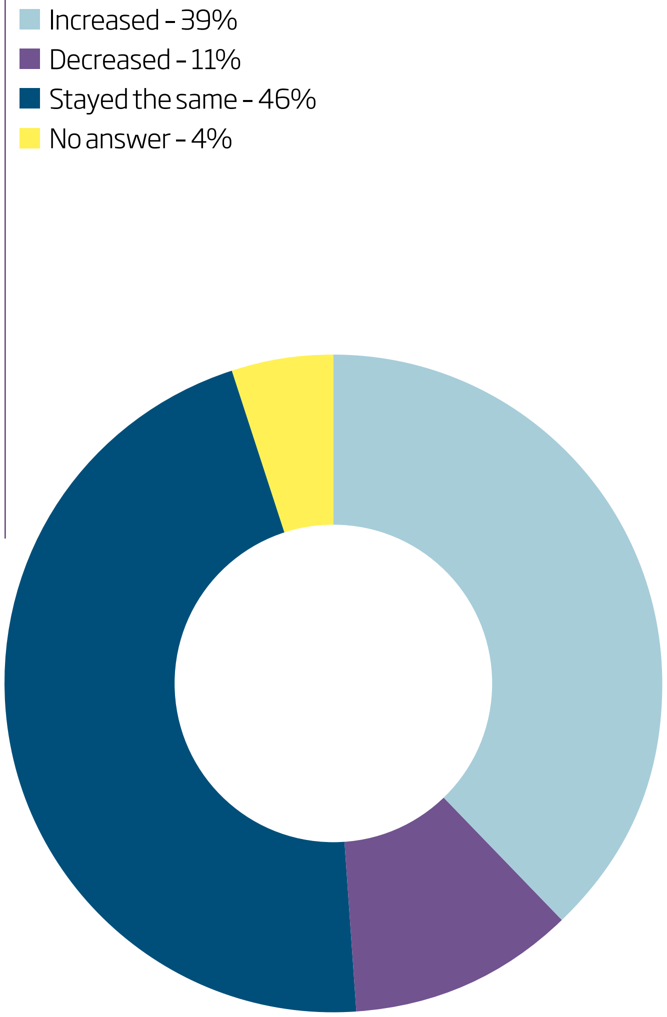
Local authority museums had lower numbers of volunteers (an average of 23) compared to independent museums (50) and independent former local authority museums (82).

National Trust museums reported a strong volunteer capacity, with an average of 197 volunteers. And there were also a relatively large number of volunteers at national museums (62).

Reliance on volunteers is stretching resources

The figures themselves suggest a healthy outlook for museums' volunteering capacity, with 39% of respondents saying their number of volunteers had increased, and 46% reporting no change.

Fig. 4.3
Number of volunteers in 2016/17 compared to previous year



4 WORKFORCE

Across most major types of museum, there were more venues reporting increases than declines. Particularly strong increases in volunteer numbers were reported by independent former local authority museums (58%) and national museums (64%).

However, in the comments they submitted, a large number of museums said that issues relating to volunteering were among the key challenges they will face in the year ahead.

In the context of funding reductions, many museums said they were aiming to grow their volunteer base, and some added that volunteers were stepping in to fill previously paid positions. But they face the challenge of an ageing volunteer workforce and competition from other organisations for fresh faces.

"An ageing volunteer workforce presents potential problems – like illness, and inability to cope. Some of our new volunteers are younger and we continue to look forward and adapt to change."
Independent Museum, South West England

"The biggest challenge is succession because most of our trustees, Friends and helpers are over 70, and younger potential recruits are hard to find."
Independent Museum, East of England

"Potential volunteers are being bombarded with requests for their help by more and more organisations that can no longer rely on paid staff (library assistants, assistant positions in schools, churches etc.)"
Independent Museum, Yorkshire

"A major challenge is the recruiting and retaining of volunteers and trustees in an increasingly competitive field."
Independent Museum, South West England

"The museum is at risk of closure and, if not, may have staffing reductions and replacement of paid staff by volunteers."
Local Authority Museum, East Midlands

"A challenge is succession planning and the need to attract younger volunteers willing to take on administrative tasks required by the Accreditation body."
Independent Museum, South West England

"Continuing to fund and manage the museum without the resource to pay for a curator/manager places a possibly unsustainable burden on a small core of volunteers carrying out the equivalent role."
Independent Museum, Scotland

5 PUBLIC-FACING SERVICES

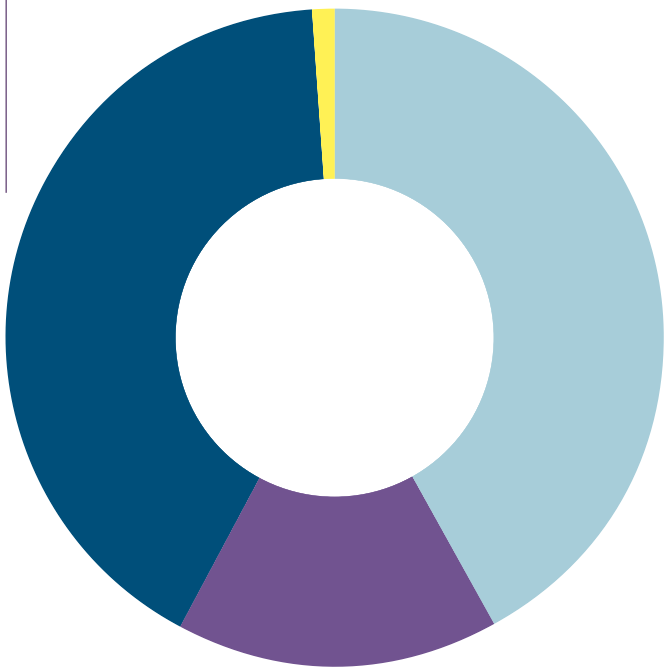
The survey results suggest that museums continue to prioritise core public-facing work, despite financial pressures. Most venues either maintained the same level of activity as previously, or increased it.

5.1 Learning

A large proportion (42%) of museums said that school visits had increased, with a similar percentage (41%) reporting no change. Only 16% said that school visits had decreased.

Fig. 5.1
School visits in the past year

- Increased - 42%
- Decreased - 16%
- Stayed the same - 41%
- No answer - 1%



5.2 Work with specific groups increases

The potential for museums to make a positive social impact across a wide range of areas is attracting increasing interest, in part through initiatives such as the MA's Museums Change Lives campaign. The survey confirms that museums undertake work with many different groups and communities in their public-facing activities.

The groups that museums were most likely to engage with were schools, which more than three quarters (77%) of respondents had worked with.

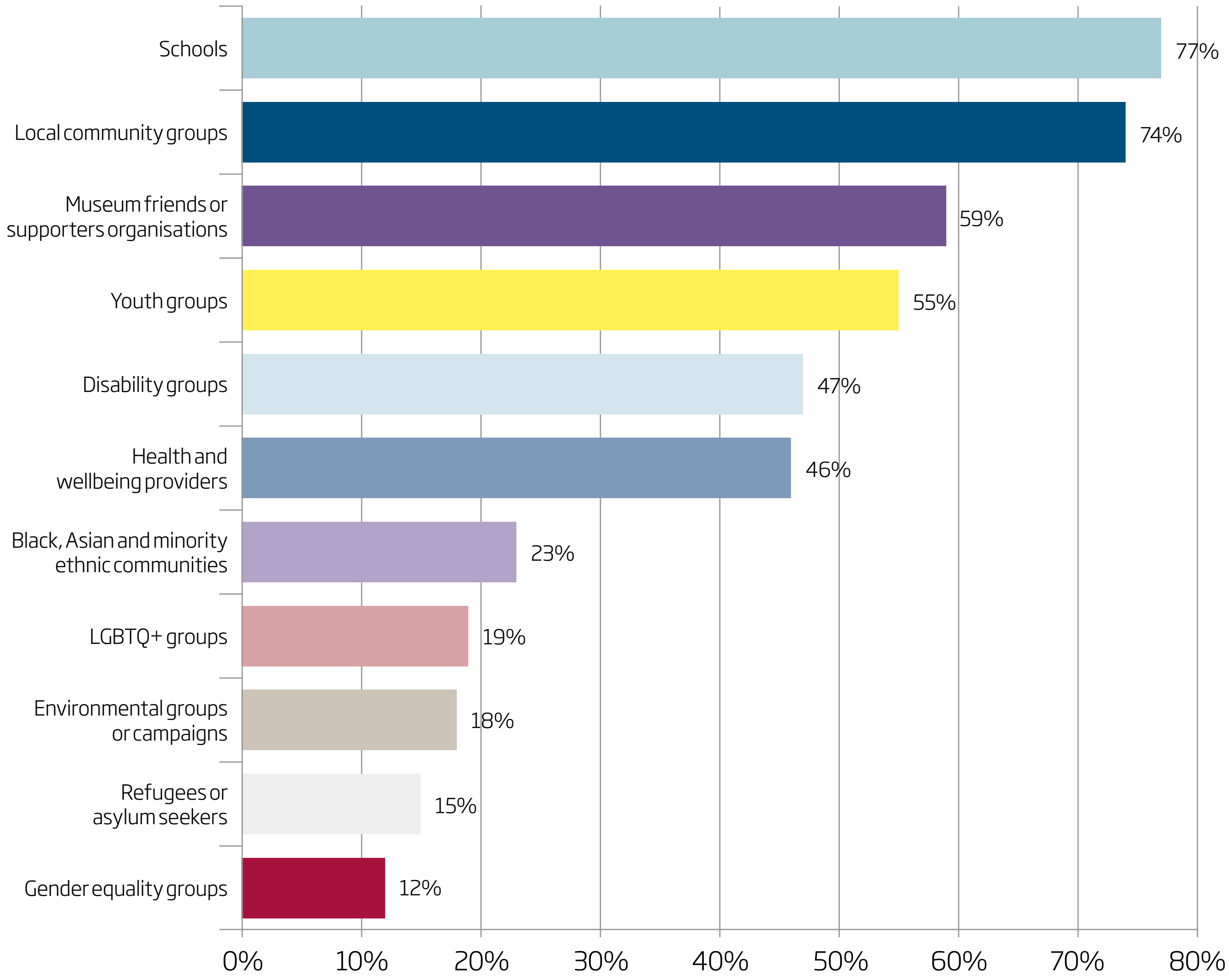
The survey also found a large proportion (74%) of museums working with local community groups. And more than half of respondents had also worked with museum friends or supporters associations (59%) and youth groups (55%).

Large percentages of museums said they had worked with health and wellbeing providers (46%) and disability groups (47%) in the past year.

Smaller but significant proportions of respondents said they had worked with black, Asian and ethnic minority communities (23%), environmental groups or campaigns (18%), LGBTQ+ groups (19%), refugees or asylum seekers (15%) and gender equality groups (12%).

Although the data sets are not directly comparable, the percentage of museums saying they work with many of these groups has increased significantly since last year's Museums Survey. The largest increases were for museums working with disability groups (rising from 13% to 47%), LGBTQ+ groups (8% to 19%) and environmental groups or campaigns (8% to 18%).

Fig. 5.2
Work with stakeholders in the past year



Other groups that museums reported working with included prisoners and former offenders, victims of crime groups, under-fives, enthusiast groups, care homes, churches, universities, and a pagan moot.

5.3 Public-facing work remains a priority

Almost half of participating museums (48%) said that they had increased their public events activity, with 41% saying that it had stayed the same. Only 11% reported a decrease.

Likewise, only a small proportion of museums (14%) said they had reduced their temporary exhibitions activity. 60% said they had maintained the same level of activity in this area as previously, and a quarter reported a growth in temporary exhibitions work.

Fig. 5.3
Public events in the past year

- Increased - 48%
- Decreased - 11%
- Stayed the same - 41%
- No answer - 1%

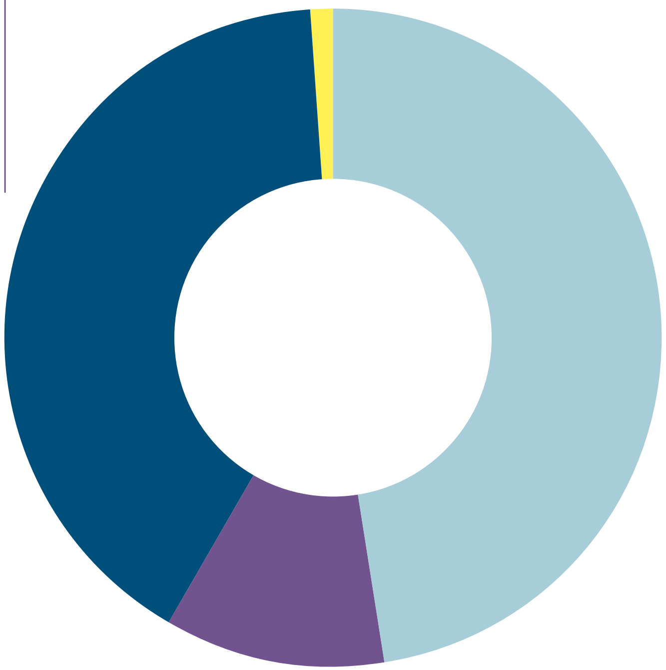
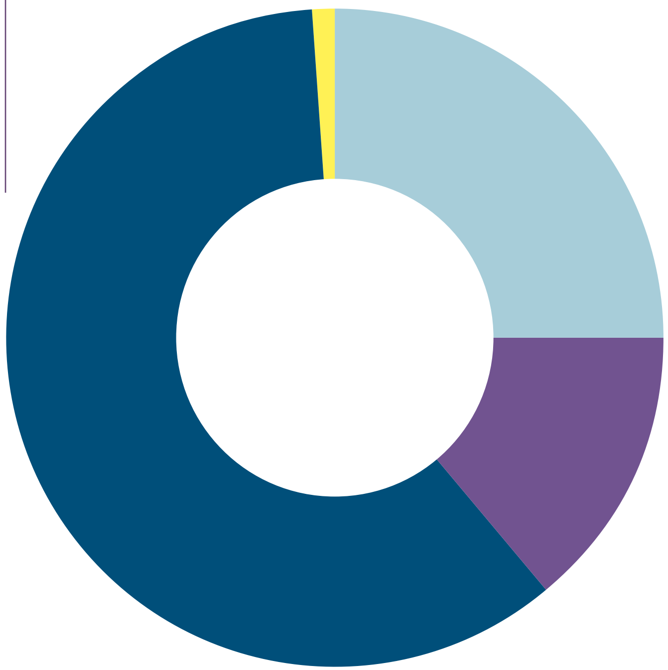


Fig. 5.4
Temporary exhibitions in the past year

- Increased - 25%
- Decreased - 14%
- Stayed the same - 60%
- No answer - 1%



5.4 Digital – 8% of museums without a website

It is becoming increasingly important for museums to engage online with audiences, both as a way of encouraging in-person museum visits, and as a channel in its own right.

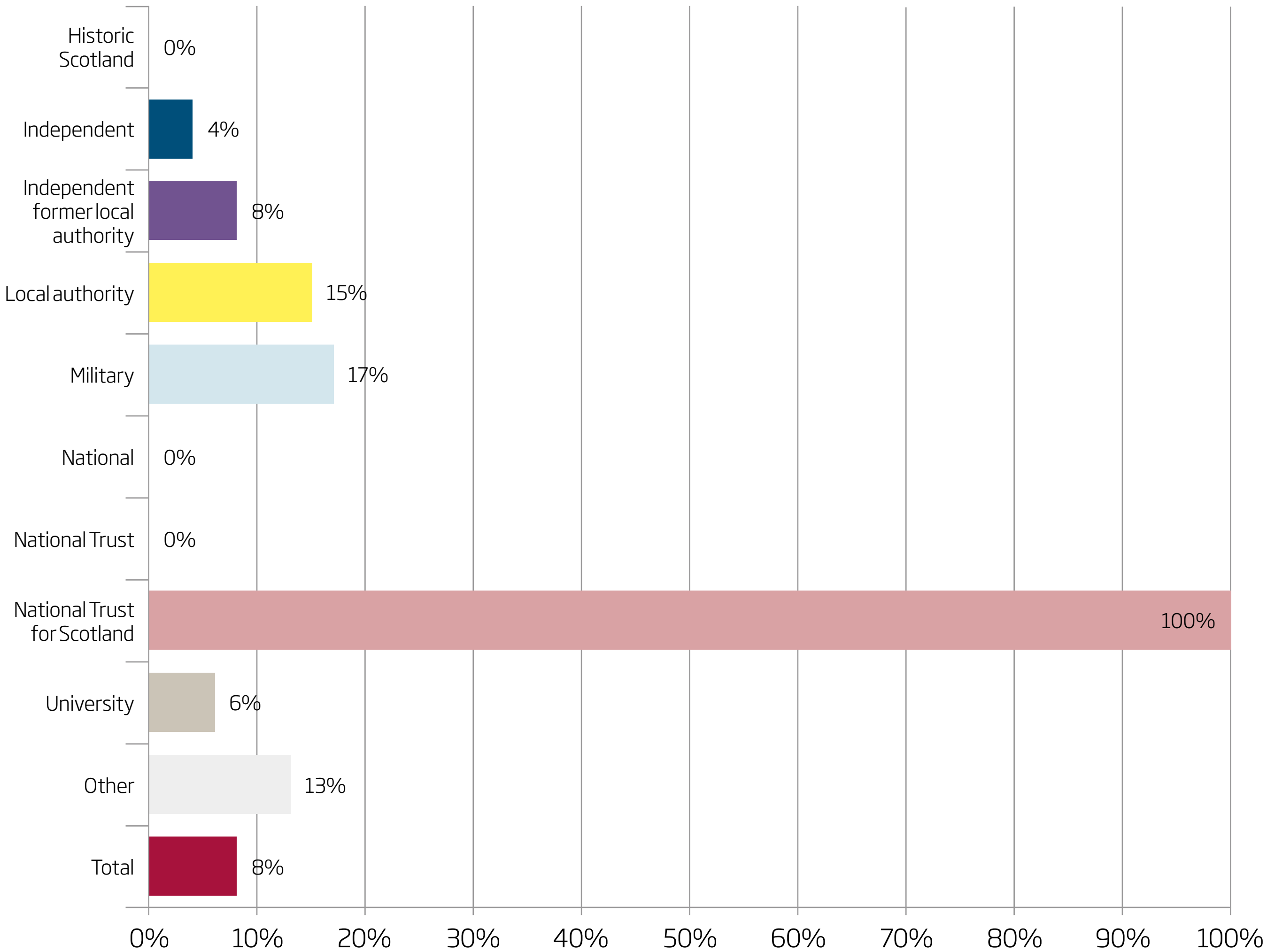
While the survey confirms that the vast majority of museums have their own website, there is still a significant minority (8%) which do not.

The types of institutions most likely to report not having their own website were military museums (17%) and local authority museums (15%).

The question of whether local authority museums should manage their own digital presence has been a topic of recent discussion. The Mendoza Review suggested that local authorities should consider granting museums under their control "communication and digital freedoms".

The survey results suggest that museums that have moved out of local authority control enjoy more digital freedoms, with a lower proportion (8%) saying they don't have their own website than that reported by council-run institutions.

Fig. 5.5
Museums without own website



Social media

The vast majority of museums (89%) also use social media to engage with audiences.

The types of museum most likely to say they did not use social media were military museums (22%), independent museums (13%) and local authority museums (10%). All of the independent former local authority museums responding to the survey reported using social media.

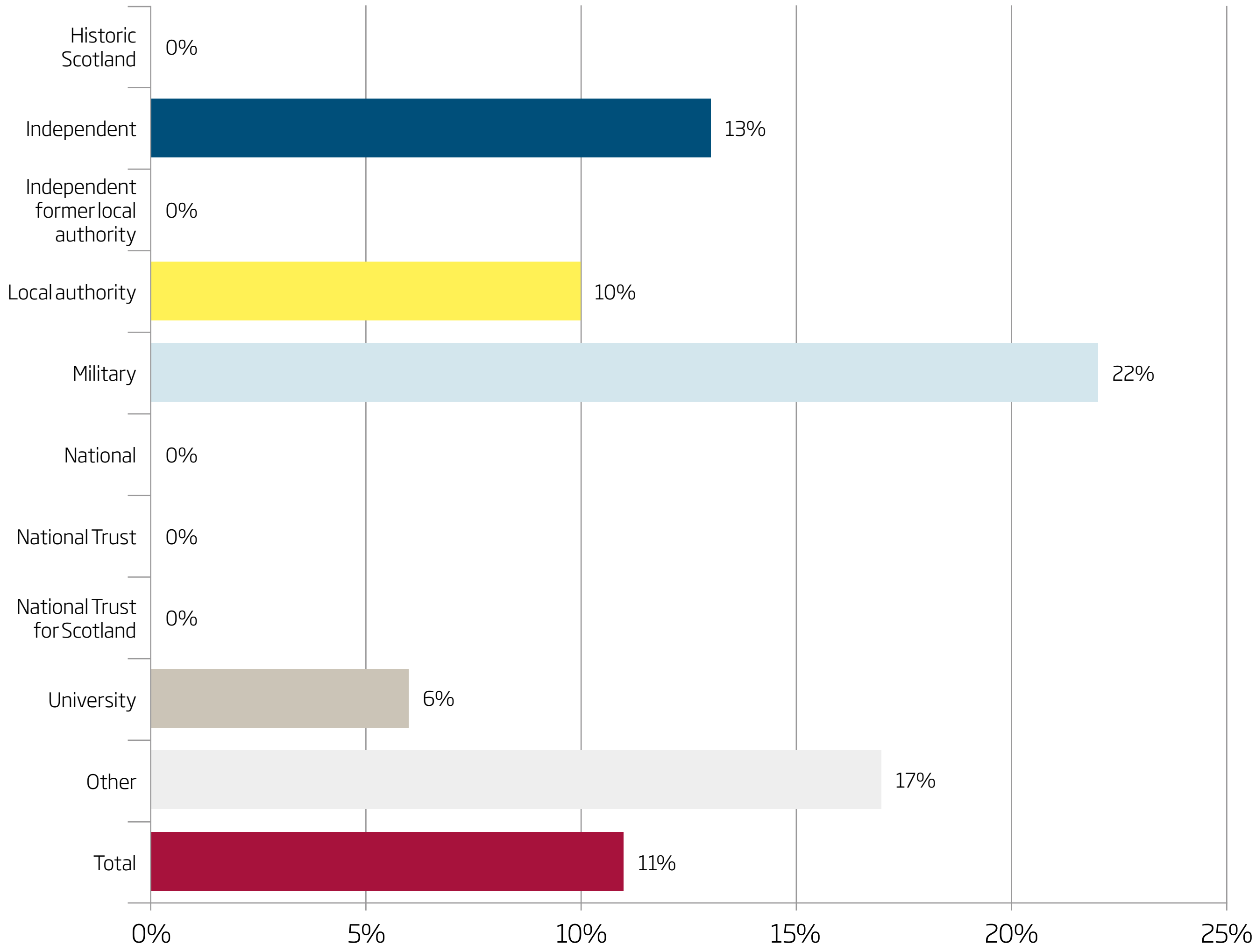
Local authority control of online communications was raised as an issue in the comments submitted. But digital was also highlighted as an opportunity, for its potential to impact marketing and the organisation more generally.

"We make limited use of social media. A challenge we face is to increase this as a means of engagement and publicity, but it's difficult in a local authority context."
Local Authority Museum, Northern Ireland

"Digital offers huge opportunities for increasing access to our collections and wider work and reaching new audiences and for new ways of enabling flexible working."
Independent Museum, West Midlands

"A challenge next year will be embedding digital across the museum."
Independent Museum, North West England

Fig. 5.6
Museums not using social media



6 BREXIT

The UK's impending exit from the European Union looms on the horizon for the museum sector along with the rest of the UK economy. One key issue is the status of EU citizens who are not from the UK, but who are living and working in the country.

Theresa May wrote an open letter to EU citizens in the UK in December 2017 assuring them that their rights would be written into UK law, and that they would be eligible to apply for "settled status" in the UK following Brexit. But it has been reported that some EU citizens are nonetheless opting to leave the UK in response to prolonged uncertainty and increased hostility towards immigrants.

Research by KPMG last year, based on a survey of 2,000 EU citizens in the UK, found that "how people feel, rather than more practical issues such as the value of the pound or applying for residency, is the key dynamic driving EU nationals to reconsider life in the UK or not come in the first place"[1].

The survey results underline the potential for Brexit to impact the museum sector workforce. Overall, respondents reported a small but significant proportion of employees (4%) who are citizens of other EU countries. This is broadly consistent with figures published by the Department for Digital, Culture, Media and Sport, which indicate that in 2016, citizens of other EU countries formed 4.6% of the UK's cultural sector workforce[2].

The survey findings suggest that over a third of museums in the country could potentially see their staffing arrangements disrupted by Brexit.

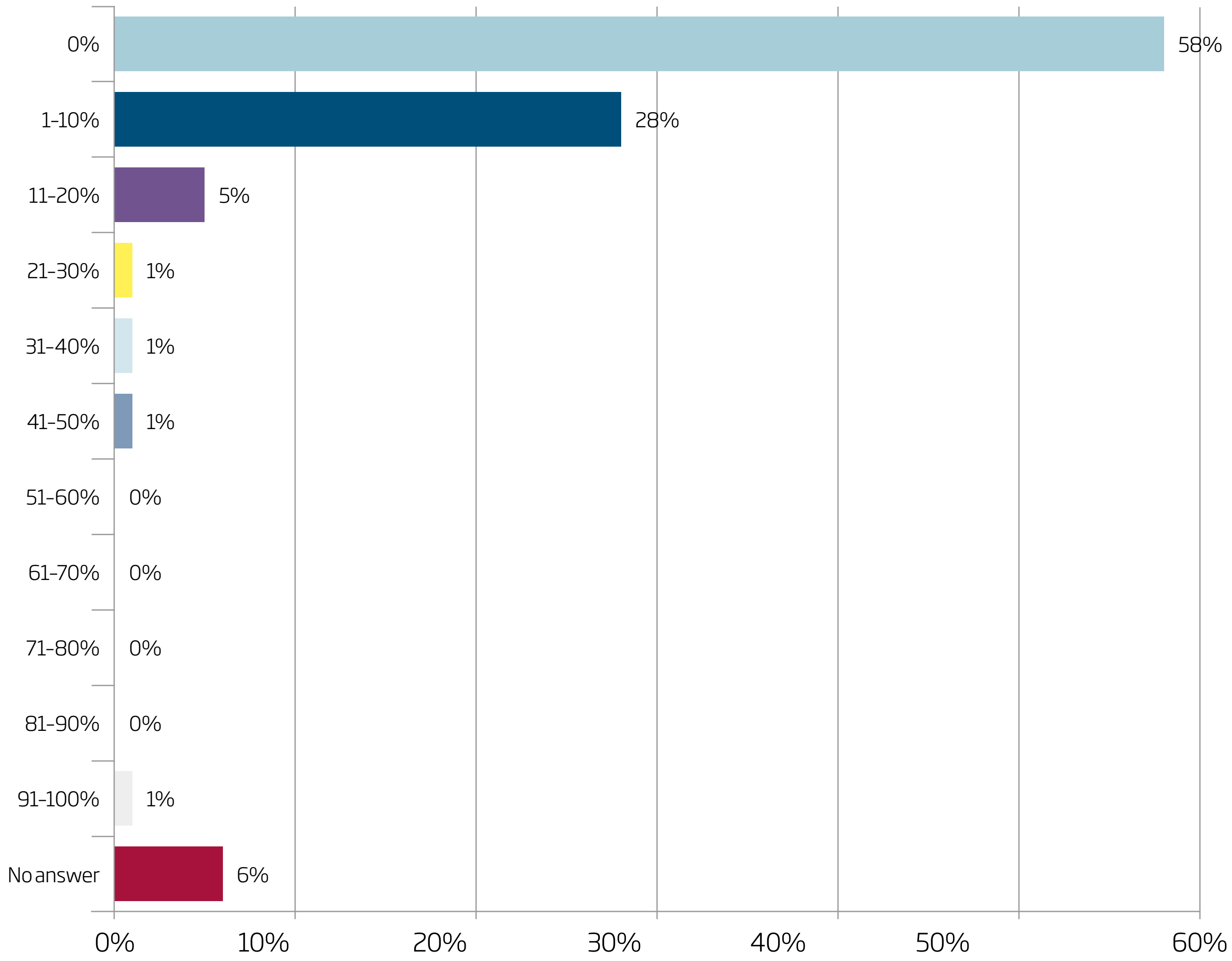
Just over a quarter of respondents (28%) said that non-UK EU citizens comprised between 1% and 10% of their workforce. 5% of survey respondents said that this group formed between 11% and 20% of their staff, and 3% had more than 20% of staff belonging to the demographic.

More than half of museums (58%) reported no citizens of other EU countries among their workforce.

[1] https://assets.kpmg.com/content/dam/kpmg/uk/pdf/2017/08/the-brexit-effect-on-eu-nationals.pdf

[2] https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/640628/DCMS_Sectors_Economic_Estimates_2017_Employment_and_Trade.pdf (p.11)

Fig. 6.1
Proportion of museum staff citizens of EU countries other than the UK



The museums most likely to employ EU citizens not from the UK were in Northern Ireland (where 7% of the workforce is from this demographic) and Scotland (6%). In England and Wales, the percentages were 4% and 3% respectively.

Non-UK EU citizens were spread fairly evenly across different types of museum. Apart from museums within the National Trust for Scotland, which said that 15% of their workforce was from this group, all other types of museum reported a percentage of 5% or lower.

6.1 EU funding

Another concern for museums is that Brexit would prevent them receiving EU funding.

The survey revealed that a large majority of museums (84%) had not received any EU funds for museum programmes or capital developments since 2010. This corresponds to the findings of the Mendoza Review that EU funding received by museums in England was "relatively small" compared to domestic funding (it estimated the total amount at around £1m per year for English regional museums and £3m per year for English national museums). But it nonetheless leaves a significant proportion (14%) of institutions that did receive EU funding.

Moreover, these results, which concern direct funding for museums, do not necessarily reflect the broader consequences of the withdrawal of EU money on museums. A Cornish museum which had not received any EU funds since 2010, for example, commented that the removal of EU funding was "potentially devastating for the county".

Museums in Northern Ireland (38%) and Wales (32%) were the most likely to report having received EU funding. And a far larger proportion of national institutions (58%) had been given money than any other type of museum. 17% of national trust museums, and 15% of independent former local authority museums, had also benefited from EU funds.

Examples of EU-funded projects

A large proportion of the specific examples given by museums of EU funding were awarded for redevelopment. Respondents also said they had received money for purposes including staff posts, film digitisation, training, and research. These projects sometimes involved multinational partnerships.

"Via the council we were able to secure an EU-funded visitor service and interpretation position for 12 months."
Independent former Local Authority Museum, North West England

"Capital development of our Christian Heritage Gallery. We are about to embark upon three projects worth a total of £384,500. These will run until 2020."
Local Authority Museum, Northern Ireland

"Participation in a pan-European Erasmus Project: research on sustainable concepts involving social and professional integration of disadvantaged young people."
Museum, North East England

"We are currently partnered with Jamtli Museum, Östersun, Sweden in an EU-funded ERASMUS 'Sharing and Learning' project. As part of this, we have also secured funding for partnership with the Nordic Centre of Heritage Learning and Creativity on a 'lifelong learning project."
National Museum, Wales

6.2 Brexit – risks and opportunities

Survey respondents were also asked to comment on key risks and opportunities they had identified associated with Brexit.

The potential loss of EU funding and EU citizen staff members, as well as difficulties recruiting new staff members and working with European partner organisations, were frequently mentioned as risks. The wider economic impact of Brexit was also highlighted, with potential effects including an increased cost of supplies as well as reductions in rental income from local businesses, philanthropy, and visitor spending.

Many museums were concerned about the possibility of fewer overseas visitors, although others pointed out that a weaker pound could boost both international and domestic tourism, and that relaxed visa restrictions for non-EU countries could also potentially increase visitor numbers.

Risks

"We have significant concerns over the recruitment of skilled scientists from the EU; and concerns about scientific technical, visitor and other support staff. We also have concerns about the potential loss of EU science funding, and about the movement of items to Europe and the risk that costs will increase if less permissive customs arrangements are in place."
National Museum, London

"As part of the university museums sector, significant risks associated with academic funding have been identified. These will have knock-on effects upon museum and cultural provision."
University Museum, North East England

"We have already seen price rises from many of our retail suppliers due to Brexit and as a charity we are unable to absorb these costs meaning they are passed on to the consumer – as many of our visitors are from low-income families this could discourage secondary spend at the museum."
Independent Museum, North East

"We were hoping to collaborate with counterparts in Europe and this is looking more challenging."
Independent Museum, East of England

"Currently the weak pound is encouraging visitors to come to the UK. However, it is unclear if this will be maintained, given the huge uncertainty around Brexit. Tougher border controls, possible reduction of flights, a general feeling of not being welcome (even though they are) could all impact on the willingness of our European friends to visit the UK."
Independent Museum, Scotland

"The curator (who is also involved with school visits etc.) does feel that Brexit has created tensions in the community. For example, one of the visiting teachers commented that the curator's job should be given to a local person (not a foreigner)."
Independent Museum, Scotland

Opportunities

"We hope to increase still further our international visitors as visa restrictions on non-EU citizens such as people from China, the US and Australia are likely to be relaxed."
Independent Museum, London

"The weaker pound has increased the number of foreign visitors this year – after Brexit, who knows?"
Independent Museum, Scotland

"There will be more domestic tourism and hopefully a greater governmental focus (when it gets its head out of the sand) on the needs of the UK."
Independent Museum, East of England

MUSEUMS IN THEIR OWN WORDS

Museums were also asked to identify challenges and opportunities for the year ahead.

Among the challenges named by respondents were maintenance backlogs, creating a sustainable operating model, managing the Accreditation process, political uncertainty, and terrorism.

Many museums identified opportunities linked to individual capital projects or broader initiatives such as the Great Exhibition of the North. Other opportunities identified were partnering with local universities, community groups and tourism organisations, and developing international work.

Opportunities

"We have an opportunity to link with tourism projects and align with specific local initiatives".
Local Authority Museum, Northern Ireland

"There is an opportunity to work with more community organisations, continue to build community networks, and expand the scope of project work with wider networks".
Independent Museum, East Midlands

"Being part of the county's National Portfolio Organisation will provide new opportunities in the form of an outreach programme, and trainee curators, but also challenges in terms of an increase in workload without a mirrored increase in capacity."
Military Museum, South West England

"Our long-awaited move to our new larger and more central premises will enable us to expand our services dramatically."
Independent Museum, South England

"Significant opportunities exist to develop international working in Japan, China, Taiwan, Nepal and Malaysia. Additional opportunities to work with the sector in the North East are similarly likely to develop as the university's overarching cultural organisation establishes itself as a major player."
University Museum, North East England

Challenges

"A pressing and increasing concern is the maintenance/capital backlog we face."
National Museum, London

"With overall budgets remaining static, the museum is finding it harder to spare money to invest in new display cases and exhibitions. Therefore the need to find alternative sources of funding simply to renew and refurbish the museum has become more acute."
Museum, North West England

"The museum faces an ongoing financial challenge as the block grant for Northern Ireland continues to be diminished. This issue is exacerbated by the lack of government and the fact that no political voice exists to fight against the potential excesses of Brexit."
Museum, Northern Ireland

"Terrorist attacks are driving public interest out of central London."
Military Museum, London

"The Accreditation process is top heavy, and it is no wonder that Arts Council England is unable to administer it. They should simplify their requirements drastically, and halve the work to the point they can cope with it."
Independent Museum, Yorkshire

MUSEUMS ASSOCIATION

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