

MUSEUMS  
ASSOCIATION

# CUTS SURVEY 2013

October 2013  
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[www.museumsassociation.org](http://www.museumsassociation.org)

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# KEY FINDINGS

## From July 2012 to July 2013

- Half (49%) of responding museums experienced a cut to their overall income
- Almost a quarter (23%) of respondents saw their overall income decrease by more than 10%
- Over a third (37%) of respondents cut staff
- Over a fifth (21%) of respondents cut staff numbers by over 10%
- Almost half (47%) of responding museums increased the numbers of volunteers and interns
- Almost a quarter (23%) of respondents reduced the number of temporary exhibitions
- School visits decreased at nearly a third (31%) of respondents
- Over a quarter (28%) of respondents reduced the free events on offer

## Over the coming year

- Two thirds of respondents will be focusing more on generating income (67%) and fundraising (68%)
- Almost half (47%) will be focusing more on encouraging participation

## Over three years

Over a three year period the Museums Association's survey has reported year-on-year cuts. These reveal that:

- staff numbers were down at 37% of respondents in 2013, 42% in 2012 and 51% in 2011
- income was down at 49% of respondents in 2013, 51% in 2012 and 58% in 2011.

This year 40% of respondents believe that the quality of service provided by their museum will increase over the next 12 months. This is a higher level of confidence than reported in any previous survey (2012: 36%; 2011: 13%).

# INTRODUCTION

In July 2013 the Museums Association (MA) invited museums from across the UK to participate in our annual survey to provide up-to-date information on the changes taking place in museums and the impact of these changes upon the sector. This report follows on from our 2011 and 2012 reports into the impact of cuts on UK museums.

Respondents were asked to comment on changes over the past 12 months to income, staffing levels and service provision, including opening hours, temporary exhibitions, school visits and free events. 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, for the first time, to comment on the changes they anticipate for their museum in the longer term.

131 individuals responded to the survey, representing 124 museums or museum services.<sup>1</sup> The respondents broadly comprise a representative sample of the museum sector in Great Britain<sup>2</sup>, with a regional balance and a variety of museums by type and size, as shown in the table opposite.

| Area / Type of museum | Independent | Local authority | National  | Other (including Military and University) | Total      |
|-----------------------|-------------|-----------------|-----------|-------------------------------------------|------------|
| Central *             | 11          | 17              | 0         | 1                                         | 29         |
| North**               | 6           | 14              | 3         | 2                                         | 25         |
| Scotland              | 5           | 8               | 1         | 0                                         | 14         |
| South***              | 19          | 19              | 5         | 6                                         | 49         |
| Wales                 | 1           | 3               | 1         | 0                                         | 5          |
| Other****             | 1           | 0               | 0         | 1                                         | 2          |
| <b>Total</b>          | <b>43</b>   | <b>61</b>       | <b>10</b> | <b>10</b>                                 | <b>124</b> |

\*Central – East of England, East and West Midlands

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

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

\*\*\*\*One respondent did not state their region and one respondent represents a multi-region organisation

## References

**1** Where two or more entries were received from the same museum the entry from the most senior member of the organisation was used, although comments from all 131 individual respondents were used to inform the writing of this report.

**2** No responses were received from museums in Northern Ireland.

# INTRODUCTION

## **In the report:**

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

Section Two looks at the year ahead at expected changes to quality of service provision and the areas of work museums will focus on.

Section Three looks at the comments made by respondents when asked to consider how they think things will change at their museum over the next three years.

Throughout the report there is reference, and comparison, to the surveys undertaken by the MA in 2011 and 2012 in order to provide an overview of the changes to the sector over a three-year period.

# SECTION 1:

## JULY 2012-JULY 2013

This first section looks at how things changed over the past year; respondents were asked to answer questions as of July 2013 compared to the previous year (July 2012) and provide information on changes to income, staff and public services.

### Overall income

The largest number of respondents (49%) experienced a decrease to their income in the year from July 2012 to July 2013 and, as Figure 1.1 shows, 23% experienced a significant cut to their budget of 10% or more. 31% saw their budget stay the same and 18% experienced an increase to their budget.

Around half (51%) of the respondents who saw their annual income decrease are local authority museums, which make up just under half of the sample. Even though local authority museums appear most likely to be affected by government cuts, other types of museums may be as likely to have experienced a fall in income: over a quarter of this group (26%) are independent museums. Times are tough for most types of museums.

In terms of geographical location, the data suggests that museums across all regions and nations have been similarly impacted.

**Figure 1.1 - Percentage changes to overall income from July 2012 to July 2013**

| 25%+ decrease | 10-24% decrease | 5-9% decrease | 1-4% decrease | Stayed the Same | 1-4% increase | 5-9% increase | 10%+ increase | Left blank |
|---------------|-----------------|---------------|---------------|-----------------|---------------|---------------|---------------|------------|
| 5             | 24              | 17            | 15            | 39              | 9             | 7             | 6             | 2          |
| 4%            | 19%             | 14%           | 12%           | 31%             | 7%            | 6%            | 5%            | 2%         |

# SECTION 1:

## JULY 2012-JULY 2013

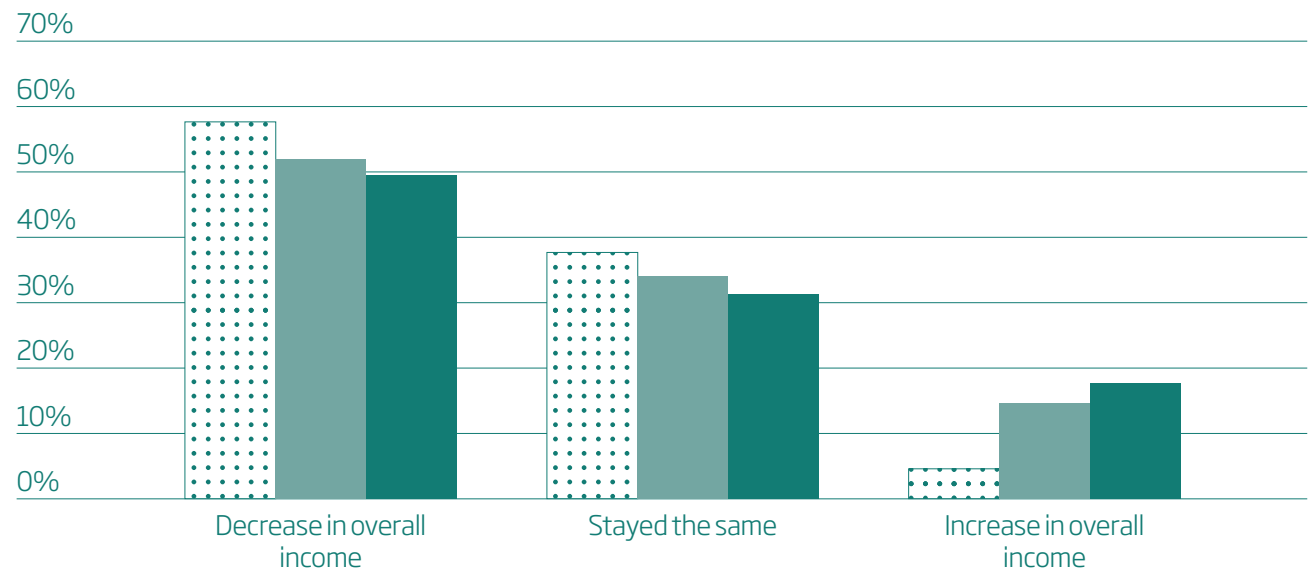
### Changes to income over 3 years

Figure 1.2 shows that the majority of survey respondents experienced a decrease in their annual budget in each year in which the survey was carried out (58% in 2011, 51% in 2012, and 49% in 2013). For some museums cuts to income are happening year on year.

On a more positive note the extent of the percentage cut to income has decreased year on year, as shown in Figure 1.3, with only 4% of museums experiencing a cut to their budget of more than 25% in the 2013 survey as compared to 20% of responding museums in 2011. This might suggest that for many museums the most severe cuts may be behind them.

Figure 1.2 - Changes to overall income by year surveyed

Year 2011  
Year 2012  
Year 2013

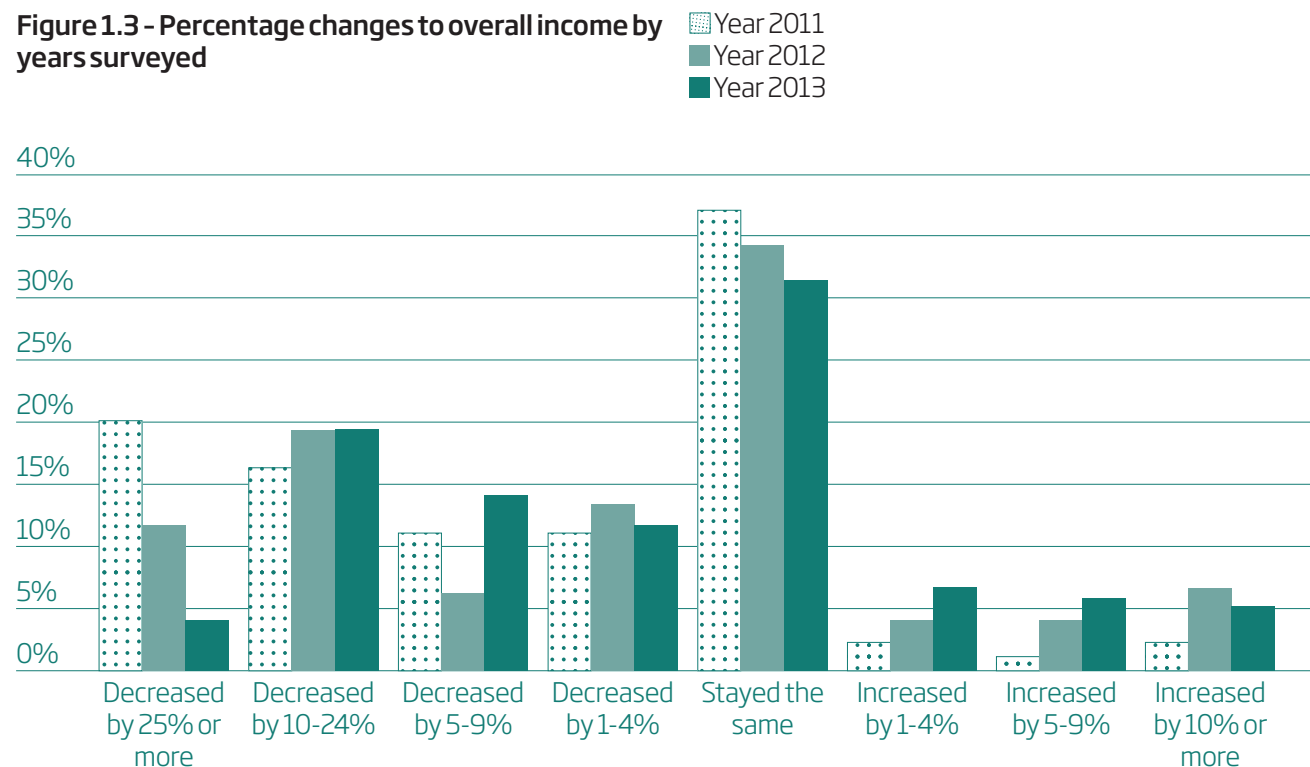


|                            | Year 2013 | Year 2012 | Year 2011 |
|----------------------------|-----------|-----------|-----------|
| Decrease in overall income | 49%       | 51%       | 58%       |
| Stayed the same            | 31%       | 34%       | 37%       |
| Increase in overall income | 18%       | 15%       | 5%        |
| Left blank                 | 2%        |           |           |

## SECTION 1:

### JULY 2012-JULY 2013

**Figure 1.3 - Percentage changes to overall income by years surveyed**



It is also of interest that the percentage of respondents seeing their overall income increase has risen over the last three years from 5% in 2011 to 18% in 2013, as shown in Figure 1.2, and suggests that for some museums things are improving. (Of this group 45% are local authority and 45% are independent.) For some museums, this is a result of increased project funding and for others it is a reflection of the fact that cuts came early and that things are now improving. However, even if a museum experienced an increase in income in 2012-2013, its income could still be below that in 2010 or 2011.

*ACE Funded Renaissance grant accounts for increases in staffing etc.*

University museum, Central

*Direct public subsidy (not including projects) has reduced by 5% but our overall income has increased by 12%. This is due mainly to increased project funding and an increase in visitor numbers*

Independent museum, Central

| Year | Decreased by 25%+ | Decreased by 10-24% | Decreased by 5-9% | Decreased by 1-4% | Stayed the Same | Increased by 1-4% | Increased by 5-9% | Increased by 10%+ | Did not answer | Total |
|------|-------------------|---------------------|-------------------|-------------------|-----------------|-------------------|-------------------|-------------------|----------------|-------|
| 2013 | 5                 | 24                  | 17                | 15                | 39              | 9                 | 7                 | 6                 | 2              | 124   |
|      | 4%                | 19%                 | 14%               | 12%               | 31%             | 7%                | 6%                | 5%                | 2%             | 100%  |
| 2012 | 14                | 21                  | 8                 | 15                | 39              | 4                 | 5                 | 8                 |                | 114   |
|      | 12%               | 19%                 | 7%                | 13%               | 34%             | 4%                | 4%                | 7%                |                | 100%  |
| 2011 | 28                | 23                  | 15                | 16                | 52              | 3                 | 1                 | 2                 |                | 140   |
|      | 20%               | 16%                 | 11%               | 11%               | 37%             | 2%                | 1%                | 2%                |                | 100%  |

# SECTION 1:

## JULY 2012-JULY 2013

*[Our Museum] cut early and although we had to face serious cuts in 2008, 2009 and 2010 the last two years have seen a turnaround with more international income and more support for public engagement*

University museum, South

### Change in income streams

This is the first year that the MA has asked respondents a specific question on income streams, namely self-generated income (defined as retail, venue hire, admission charges etc.) and individual giving (defined as philanthropy and donations). The inclusion of this question reflected a belief that, to survive and thrive in straitened financial times, many museums may be shifting their focus to procuring alternative sources of revenue. However, museums appear to be having mixed success at attracting new sources of income.

As shown in Figure 1.4, 42% of respondents said that their museum had increased self-generated income and 28% saw increased individual giving (increase as a percentage of overall income in the past 12 months). This is perhaps not as high as expected considering that in the 2012 survey, 69% of respondents said they expected to be doing more work in the area of generating income (defined as venue hire and retail), and 62% said they would be focusing more on fundraising (defined as applying for grants and philanthropy). Of course, deciding to focus more time on an area does not automatically lead to increased success, but it is surprising that just over a fifth of respondents (22%) reported that the percentage of self-generated income actually decreased and 17% attracted a smaller proportion of individual donations.

One of the reasons for a decrease in self-generated income is arguably the tougher economic times being experienced by museum audiences, something that was mentioned as a factor by a number of museums:

*As a small independent around 60% of our income over the last 5 years has been donations. So far in 2013 we are 40% down on 2012*

Independent museum, Wales

*Fewer visitors brought in less income, a tough time for all*

Independent museum, South

**Figure 1.4 - Changes to self-generated income and individual giving as compared to July 2012**

|                 | Self-generated income |      | Individual giving |      |
|-----------------|-----------------------|------|-------------------|------|
| Decreased       | 27                    | 22%  | 21                | 17%  |
| Increased       | 53                    | 42%  | 35                | 28%  |
| Stayed the same | 42                    | 34%  | 66                | 53%  |
| Blank           | 2                     | 2%   | 2                 | 2%   |
| Total           | 124                   | 100% | 124               | 100% |

## SECTION 1: JULY 2012-JULY 2013

*Financial pressures have increased, and visitors have less disposable income to spend, making it difficult or counterproductive to introduce price rises*

Local authority museum, Central

Another reason affecting the ability to maximise self-generated income could be the impact that cuts had on staff levels. A number of respondents commented on their reduced operational capacity and consequently, their inability to adapt and pursue development opportunities.

*Our ability to adapt to these changing circumstances has been severely curtailed by the loss of staff*

Local authority museum, Central

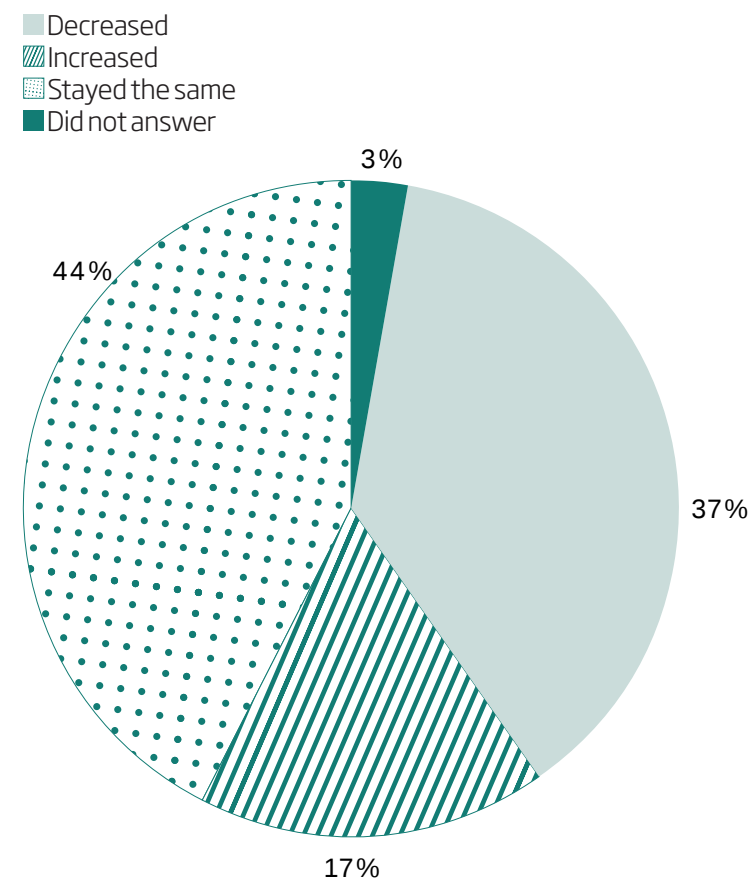
### Staff and volunteers

Respondents were asked to compare the total number of full time-equivalent paid staff with that of July 2012. Figure 1.5 shows that 37% of respondents saw a cut to staff numbers and 44% saw no change in the number of staff levels. 21% of respondents cut staffing levels by more than 10%.

Although the number of respondents reporting a reduction to staff levels is slightly lower in 2013 than in previous years, over a three-year period respondents to the Museums Association survey have reported cuts in staff numbers every year, with 42% reporting a reduction in staff in 2012 and 51% in 2011.

A number of respondents mentioned the demoralising effect of staff cuts and the stress experienced by staff due to job insecurity and the pressures of an increasing workload - often further exacerbated by the failure to replace people who retire or when on maternity leave.

Figure 1.5 - changes to full-time equivalent staff as compared to July 2012



## SECTION 1: JULY 2012-JULY 2013

*Staff are increasingly stressed and there are significant tensions developing*

Local authority museum, North

*The biggest change is to be found in the chaos that continual cuts has on the service and the increasing frustration and demoralisation that is growing in its wake*

Local authority museum, Scotland

Cuts to staffing have an impact on the range and quality of service offered to the public.

*We are expected to do more work that comes from above with the same resources so our front-line offering has decreased*

Local authority museum, Scotland

*Staff capacity is reduced with a knock-on effect on activities offered*

Independent museum, Scotland

*School visits have had to stop, as the member of staff responsible for education is on maternity leave and has not been replaced*

Local authority museum, South

Even where respondents saw an increase in staff (17% of all respondents), some express concern about the areas in which staff are being recruited.

*Restructure has created development posts but curatorial and front-of-house staff reduced, creating difficulties in maintaining core museum functions*

Local authority museum, North

Respondents were also asked how the number of volunteers and interns at their museums had changed over the past year. 47% of respondents saw an increase in the number of volunteers and interns at their museum, up from 39% in 2012. 40% saw the number of volunteers and interns maintained at the same level.

Many respondents commented that volunteers were increasingly being used to replace paid front-of-house staff, and in the main talked of volunteers in positive, or at least neutral, terms with some mentioning volunteers as being vital to their museum's success.

*We have gone over to a professional volunteer model with many of our front-of-house staff now volunteers*

Local authority museum, South

*The increases stem from enormous amounts of... promotion by the curator and museum volunteers*

Local authority museum, South

A number of respondents expressed concerns that the loss of staff would impact negatively upon standards; in particular that the care and interpretation of the collection would be affected due to the loss of curatorial knowledge and skills.

*We have seen 5 curatorial posts reduced to 2, plus loss of Designer, Design Technician, Admin. Asst., Gardener/Handyperson, County Archaeologist - with resultant loss of provision, skill and expertise*

Local authority museum, Central

*Loss of curatorial expertise and knowledge as a result of the restructure*

National museum, North

*With the loss of the senior curator we will no longer be able to provide the curatorial adviser service for Accredited museums*

Local authority museum, Scotland

# SECTION 1:

## JULY 2012-JULY 2013

### Public services

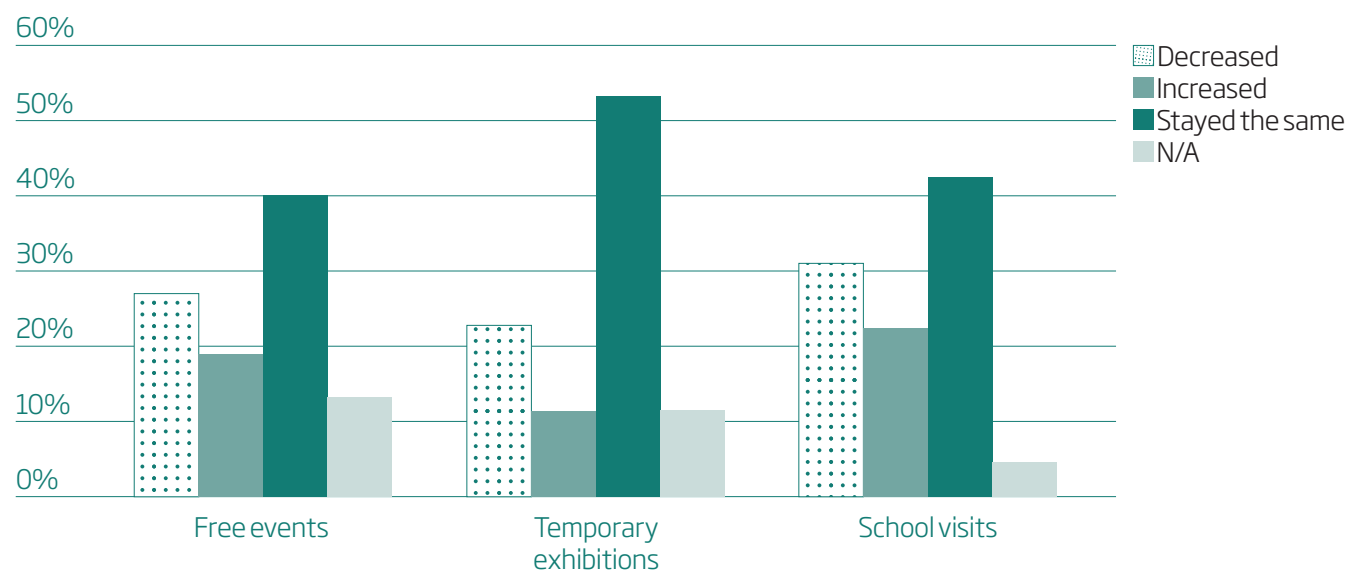
In terms of museum opening hours and museum closures, this year's survey suggests that public access to museums continues to be affected. 11% of respondents saw a reduction in their opening hours, on top of 18% in 2012 and 22% in 2011.

7% of respondents closed all or part of their museum, on top of 22% of respondents closing whole or parts of sites, permanently or temporarily in 2012.<sup>3</sup>

Museums were also asked to comment on the changes to services offered to the public over the past year. Figure 1.6 shows that 23% of all survey respondents reported a reduction in temporary exhibitions, nearly a third (31%) saw a decrease in the number of school visits and over a quarter (28%) reduced the number of free events their museum offers. In total 58% of respondents saw a decrease in at least one of these three areas.

Some respondents expressed concern that the most disadvantaged among their audience would be the most impacted by their museum's reduced offer, in particular by the reduction in free services and events.

**Figure 1.6 - Changes to free events, school visits and temporary exhibition as compared to July 2012**



|                        | Free events |             | Temporary exhibitions |             | School visits |             |
|------------------------|-------------|-------------|-----------------------|-------------|---------------|-------------|
| <b>Decreased</b>       | 34          | 27%         | 28                    | 23%         | 38            | 31%         |
| <b>Increased</b>       | 24          | 19%         | 15                    | 12%         | 28            | 23%         |
| <b>Stayed the same</b> | 49          | 40%         | 66                    | 53%         | 52            | 42%         |
| <b>N/A</b>             | 17          | 14%         | 15                    | 12%         | 6             | 4%          |
| <b>Total</b>           | <b>124</b>  | <b>100%</b> | <b>124</b>            | <b>100%</b> | <b>124</b>    | <b>100%</b> |

#### Reference

<sup>3</sup> The 2011 survey did not include a question on closures to museum sites.

## SECTION 1:

### JULY 2012-JULY 2013

*Over the last year we have had to increase charges for events (in an area of very low average incomes)*

Local authority museum, Central

Although representing a smaller group, Figure 1.6 shows that there were a number of respondents who had increased their public offer with 19% offering more free events over the past year and 23% seeing an increase in the number of school visits. For some this increase in offer was down to project funding, and for others it was a necessity in order to maintain visitor numbers even if it meant taking money away from other areas of museum work.

*This year we are developing new work and products. This is largely due to Arts Council funding directed to work with young people and building an infrastructure to develop commercial activities*

Independent museum, Central

*We're committed to survival and we have always got to be doing more to keep the profile high and visitors coming through the door*

Local authority museum, Central

*Employed education outreach worker to increase awareness of museum. Policy to expand rather than decrease activity*

Independent museum, Scotland

*We are trying to put the money into front line services so customers will still be happy but long term curatorial work on collection is compromised*

Independent museum, South

# SECTION 2: THE YEAR AHEAD

This section focuses on the coming year; respondents were asked to comment on the quality of service they expect to be able to provide and the areas of work they expect to focus on.

## Quality of service

When asked to consider how the quality of service provided by their museum would change over the coming year 40% thought the quality of the service they provide would increase (as compared to 36% in 2012 and only 13% in 2011, as shown in Figure 2.1).

Many of the respondents who answered that the quality of service over the coming year would increase put this down to the hard work and dedication of staff; although positive there was still the sense that this was in spite of everything.

**Figure 2.1 - Changes to quality of service by year surveyed**

■ Decrease  
■ Increase  
■ Stay the same

50%

45%

40%

35%

30%

25%

20%

15%

10%

5%

0%

2011

2012

2013

|                      | 2011 | 2012 | 2013 |
|----------------------|------|------|------|
| <b>Decrease</b>      | 46%  | 32%  | 27%  |
| <b>Increase</b>      | 13%  | 36%  | 40%  |
| <b>Stay the same</b> | 41%  | 32%  | 33%  |

## SECTION 2: THE YEAR AHEAD

*Staff remain committed so the quality of the service has remained high. There is (however) frustration and uncertainty due to a lack of clarity from the organisation's leadership*

Local authority museum, Scotland

*Because of staff dedication the standards will be maintained*

National museum, South

There was also a sense among many respondents that even though standards of service would be maintained there would be less on offer for visitors.

*We will strive to maintain the quality but we will do less*

Local authority museum, Central

*Quality will remain broadly in line with that which is currently offered however activity levels will significantly decrease*

National museum, North

An increased proportion of respondents saying quality of service will improve arguably reflects a growing confidence in the sector across the three years surveyed; however, it is worth noting that over a quarter of respondents (27%) think their quality of service will decrease. For many, this was due to the fact that an overstretched workforce can only do so much.

*Staff being expected to cover all the previous outputs and deliverables with reduced numbers of people to provide the service inevitably leads to a drop in quality somewhere along the line*

Local authority museum, Central

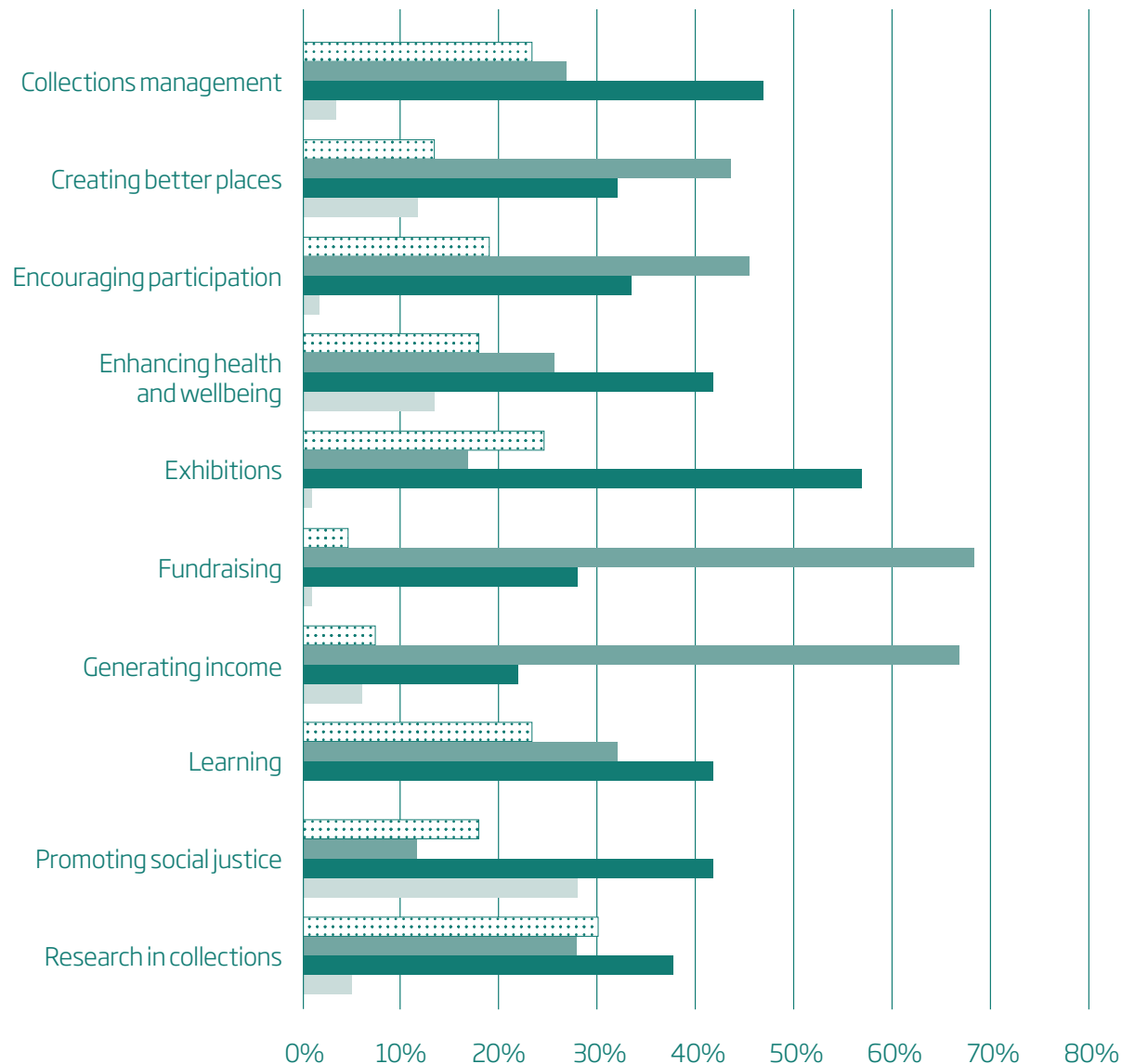
## SECTION 2: THE YEAR AHEAD

### Areas of work

Respondents were asked to comment on areas in which their organisation would be doing more, less or the same level of work. Figure 2.2 shows that for many museums a similar level of work is expected to continue across most areas. There are however, two areas of work that respondents will be very clearly focusing more on in the coming year: 66% of respondents will be focusing more on generating income and 68% on fundraising activities. The way museums operate is changing and, in times of scant resources, many museums are prioritising income generation over other activities.

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

 Less  
 More  
 The same  
 N/A



## SECTION 2: THE YEAR AHEAD

|                 | Collections management | Creating better places | Encouraging participation | Enhancing health and wellbeing | Exhibitions | Fundraising | Generating income | Learning | Promoting social justice | Research in collections |
|-----------------|------------------------|------------------------|---------------------------|--------------------------------|-------------|-------------|-------------------|----------|--------------------------|-------------------------|
| <b>Less</b>     | 23%                    | 13%                    | 19%                       | 18%                            | 25%         | 4%          | 6%                | 24%      | 18%                      | 30%                     |
| <b>More</b>     | 27%                    | 44%                    | 46%                       | 26%                            | 17%         | 68%         | 67%               | 33%      | 13%                      | 27%                     |
| <b>The same</b> | 47%                    | 32%                    | 33%                       | 42%                            | 57%         | 27%         | 22%               | 42%      | 42%                      | 38%                     |
| <b>N/A</b>      | 3%                     | 11%                    | 2%                        | 14%                            | 1%          | 1%          | 5%                | –        | 27%                      | 5%                      |

The fact that the majority of respondents will be focusing on raising income in the coming year is unsurprising and it was by far the most mentioned area in comments made by respondents.

*A great drive to raise money from lots of different areas*

National museum, South

*We are much more focused on fund raising opportunities - legacies, gift aid, fundraising events*

Independent museum, North

*Seeking to increase our earned and philanthropic income in order to address future shortfalls*

Independent museum, South

*Trying to increase the average spend by visitors in our shop*

Local authority museum, South

*We need to reassess our purpose and strategic goals- streamline and adapt our activities to reflect our reduced staff and budgets. Refocus upon income generation and long term financial sustainability*

Local authority museum, Central

Some respondents were concerned that the shift of priorities would affect the service on offer in terms of collections-based work and expertise:

*Less expertise within the service, priorities are focused on income more than users*

Local authority museum, South

*Loss of curatorial expertise leading to a longer term lack of understanding of collections*

Anonymous respondent, Wales

The final four categories of activity in Figure 2.2 are largely new in the 2013 survey and were included to reflect areas highlighted in the Museums Association's Museums Change Lives report. A significant number of museums expect to do more work in the area of encouraging participation (47%) and creating better places (44%); this is far higher than those expecting to do more exhibitions (17%) or more collections management (27%). This suggests that participation and provision for the community is becoming a higher priority for many museums, alongside finding ways to raise income.

*We will need to find a new balance between our social cohesion work and increasing income*

Local authority museum, Central

# SECTION 3:

## THE NEXT THREE YEARS

*A very uncertain future is on the horizon for our museum service*

Local authority museum, Scotland

This final section considers the longer term future. Respondents were asked to comment on how they thought things would change at their museum over the next three years.

There are responses at either end of the spectrum, from the negative: "Low staffing levels, poor pay and limited contracts will continue. Individual workloads will continue to increase with even less job satisfaction. The fabric of the building will continue to deteriorate" (Local Authority, South) to the very positive: "Expecting to exceed record income and visitors through investment over next three years" (Independent, South).

Many respondents talk of expecting more of the same, more cuts to staff and to their income and the resultant loss of service, while many mention the pressure to 'maximise income at every opportunity' (Local Authority, Central). Fundraising, generating income and finding new business models are seen by many as key to the survival of their museums. Many suggest that this would support only core museum activities and that overall, they will be doing less. Many expect to be operating at a reduced level of service with respondents mentioning that they expect to offer less in the way of public events, work with communities and exhibitions, with a reduced ability to care for and interpret the collection and provide specialist knowledge.

*The service will not be able to maintain standards and we slip back to 1950s staffing levels and standards*

Local authority museum, Wales

There are also fears that despite a shift to income-raising activities there will be more cuts to come making it difficult to make up the shortfall and impacting negatively on services.

*Now approaching breaking point. Further cuts will mean reduction in hours and services. Learning and collections services now under staffed, and working under capacity*

Local authority museum, North

*We are doing what we can to augment our income, of course, but the level of cuts in public funding will never be compensated for through income-generation*

National museum, North

## SECTION 3: THE NEXT THREE YEARS

There are also those who expect to see a change in their governance structure, particularly among local authority museums, with some respondents mentioning a possible change to trust status.

*Independence of government funding has to be the way forward for museums*

Independent museum, Multi-Region

*I'd be surprised if we remain within the local authority in our current form*

Local authority museum, Central

Overall, although for some the future is uncertain and more cuts may come, the general feeling is that museums will adapt and survive. Staff are likely to be stretched and priorities will continue to shift away from more traditional areas of museum work, but many respondents are determined to make the best of a bad situation.

*The effect of being charged to do more with less, has led us to have a good hard look at the way we operate and as a result we have transformed in a beneficial way - never waste a good crisis!*

Local authority museum, North

**October 2013**

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