Museums and Galleries in the United Kingdom (UK)

Paper delivered to the 14th Extended EGMUS Meeting
Paris, 18-19 November 2013

Context

1. Overall responsibility for cultural policy in the UK, including museums and galleries, lies with the Department for Culture Media and Sport (DCMS) whose priorities include making it easier for everyone to enjoy Britain's national culture, protecting free access to cultural institutions and overseeing the Government Art Collection.[1]

2. With less than 400 staff, the DCMS is a relatively small department within the UK government and it largely operates with the support of several executive non-departmental public bodies. Within the UK, cultural policy is devolved, meaning that the Northern Ireland Assembly, Scottish Executive and Welsh Assembly governments are responsible for policy *within* their countries. The DCMS takes responsibility for cultural policy in England in addition to its UK-wide role.

3. In England, the DCMS is supported by Arts Council England which took over responsibility for supporting the museum and gallery sector in 2011 after the closure of the Museums, Libraries and Archives Council. DCMS directly supports fourteen National museums and galleries (who may have multiple sites) with grant funding but who operate as independent bodies. Otherwise, the majority of public sector museums and galleries in England are owned and operated by local government.

4. In Northern Ireland, Scotland and Wales the governments also directly support their own national museums and galleries. They are supported in their work by the Northern Ireland Museums Council, Museums Galleries Scotland and Museums Archives and Libraries Wales (CyMAL) acting as approximate equivalents of the Arts Council in England.[2] In each country, local government also operates a significant number of sites.

5. In addition to the public sector museums and galleries above, a small number of other public museums and galleries exist such as the military regimental museums. A large proportion of museums and galleries are privately owned as visitor attractions or are in the voluntary & community sector (e.g., charities or community trusts).

Funding for culture

6. Since the start of the global economic crisis in 2008, overall public sector spending in the UK has been under pressure as tax revenues have fallen. After the 2010 General Election, a coalition government consisting of the Conservative Party and Liberal Democrat Party was formed and

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[1] Government Art Collection: www.gac.culture.gov.uk/ (checked 17/11/2013).

[2] Unlike the Arts Council England, sister organisations in Northern Ireland (Arts Council of NI), Scotland (Creative Scotland) and Wales (Arts Council of Wales) do not hold any responsibilities for museums or galleries in their countries.

under this government significant efforts have been made to reduce overall public sector spending. With some key areas of activity, such as health and education, being partially protected from budget reductions, other areas including culture have seen relatively large budget reductions.

7. In an initial Spending Review in 2010, an 'emergency' budget saw an immediate reduction in budgets of 3%. Subsequently, the DCMS budget for 2011-15 was cut by 25%, with cuts for supported national museums and galleries limited to 15%. The body responsible for supporting museums and galleries in England, the MLA, was closed and its responsibilities for museums and galleries reallocated to the Arts Council England in 2011. For 2011-15, Arts Council England itself received a budget reduction of 29%. A further reduction in the DCMS budget is planned for 2015-16 of 7%, limited to 5% for national museums and galleries.

8. Museums and galleries in Northern Ireland, Scotland and Wales have also been affected. In November 2010 funding for the Scottish national museums and galleries was cut by 4% and in Wales funding for Welsh museums, libraries and archives was cut from £46.1m in 2010/11 to £42.2m in 2013/14 (a reduction of 8.5%). In the 2013 Spending Review, the so-called 'block grants' from the UK central government in Westminster to the Northern Ireland, Scotland and Wales governments were cut by 2%.

9. At local government level, the 2010 Comprehensive Spending Review saw grant reductions from central government of 7.5% per year for four years imposed. The effect of this on cultural spending is shown in a financial data released by the Department for Communities and Local Government (DCLG) found that in the three year period from 2010-11 to 2012-13, local authority revenue spending on museums and galleries fell by 5.4%, over £15m.[3] The June 2013 Spending Review proposed a further reduction in local authority grants of 10% for 2015-16.

10. Since 2011, the effect of budget cuts on museums in the UK has been monitored by the Museums Association (MA) in an annual survey. These surveys reveal that staff numbers had fallen at 37% of respondent museums in 2013, by 42% in 2012 and by 51% in 2011. In the latest survey period covering, July 2012-July 2013, almost half of responding museums (49%) reported a fall in their income and almost a quarter (23%) had reduced the number of temporary exhibitions.[4] However, the survey also showed increases in self-generated income in over a quarter (28%) of respondents and two-fifths (40%) expected the quality of their service to increase in the year ahead – an increase on previous years.

11. As part of a policy of reducing the reliance of the cultural sector on public funds, the current UK Government has promoted philanthropic giving by individuals and organisations as an

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[3] DCLG (2013), *Local Government Financial Statistics England No. 23 2013, Annex C*, London: The Stationary Office; DCLG (2012), *Local Government Financial Statistics England No. 22 2012, Annex C*, London: The Stationary Office DCLG (2011), *Local Government Financial Statistics England No. 21 2011, Annex C*, London: The Stationary Office. Available online at: https://www.gov.uk/government/collections/local-government-finance-statistics-england (checked 17/11/2013).

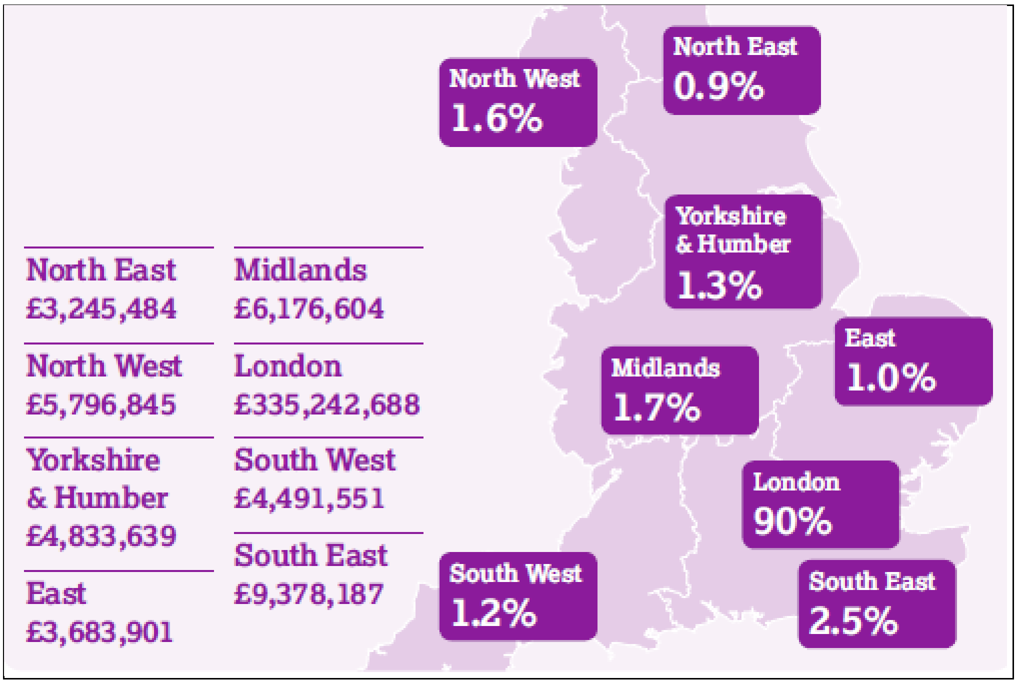
[4] Evans, G. (2013), *Cuts Survey 2013*, London: Museums Association. Available online at: http://www.museumsassociation.org/campaigns/funding-cuts/cuts-survey (checked 17/11/2013).

alternative source of funding. Policy measures include tax incentives, matched funding for cultural organisations raising their own philanthropic donations and capacity building within the sector to improve the effectiveness of its fundraising activities.

12. While many cultural organisations have benefitted from these measures, there is a concern that London-based institutions do so to a disproportionate extent. A regular survey conducted by Arts & Business found that in 2011/12 cultural organisations in England received over £3billion in funding. Private investment accounted for 22% of total cultural funding and was drawn from individual giving, trusts and foundations and business investment/giving. Museums received 13.3% of total cultural funding (£401m).

13. The survey found that London-based organisations received 90% of all individual giving to culture during 2011/12, which amounted to over £335.2m (see Figure 1).[5] Year-on-year, the amount of individual giving had increased by almost £22.9m to £372.9m since 2010/11 but was becoming increasingly concentrated in London.

Figure 1: Individual Giving to Culture in England 2011/12

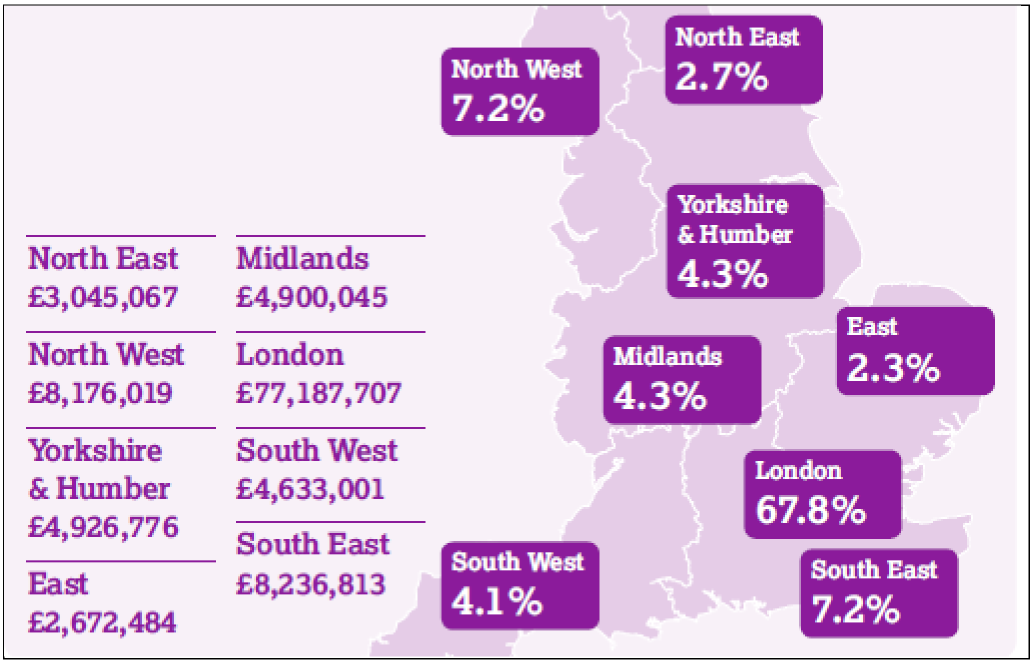


Source: Arts & Business, 2013.

[5] Arts & Business (2013), *Where is Private Investment to the Arts Going? Arts & Business Private Investment in Culture Survey 2011/12*, London: Arts & Business. Available online at: http://artsandbusiness.bitc.org.uk/research/latest-private-investment-culture-survey-201112 (checked 17/11/2013).

14. The survey also found that business investment during 2011/12 was also heavily concentrated in London, with around two-thirds (68%) - £77.2m - going to London-based organisations. Business investment in culture overall also increased slightly year-on-year by £0.2m to a total of 113.8m.

Figure 2: Business Investment in Culture in England 2011/12



Source: Arts & Business, 2013.

15. Similarly, the apparently unequal distribution of public cultural funding was also highlighted in a recent report from three leading arts figures. Their report indicated that central government spending on arts and culture amounted to £69 per resident in 2012/13, compared to only £4.60 per person elsewhere in England and that the funding gap between London and the rest of England had been growing for at least 30 years. The report excluded spending by local government and spending in Northern Ireland, Scotland and Wales where different arts funding arrangements exist.[6]

Number of visits to museums and galleries

16. Since free entry into national museums was introduced in 2001, visits to museums and galleries in England overall have increased by over 40%, but the increase has largely been driven by increased visitor numbers and these 'national' museums. Since 2001, the number of visits to the 'national' museums in London increased by 151% and by 148% at 'national' museums elsewhere in England.[7]

[6] Stark, P., Gordon, C. and Powell, D. (2013), Rebalancing Our Cultural Capital, London. Available online at: www.theroccreport.co.uk (checked 17/11/2013).
[7] VisitEngland (2013), *Visitor Attraction Trends in England 2012*, London: VisitEngland. Available online at: www.visitengland.org/insight-statistics/major-tourism-surveys/attractions/Annual_Survey/ (checked 17/11/2013).

17. Table 1 below shows the change in the number of visits at 288 English museums where data is available for 2008 and 2012.[8] At these museums, overall visits increased by over 13% or almost seven million visits. This increase is despite many of the major London and South East England museums reporting severe reductions in visitor numbers during the peak summer months of July and August due to the 'Olympic Effect' – in some cases visitor number decreased by 40% compared to 2011. During the Olympics traditional tourists were replaced by sports tourists who were evidently less likely to visit museums and galleries. In addition, a campaign aimed at easing travel congestion during the Olympics by discouraging domestic tourists and London residents from travelling into central London further reduced visitor numbers.

Table 1: Change in museum and gallery visitor numbers in England (2008-2012)

No. of visitors (2008)	No. of visitors (2012)	Change (no.)	Change (percent)
52,432,224	59,371,400	+ 6,939,176	+ 13

Source: VisitEngland (2013) Base: 288

Number of museums and galleries

18. Exact data on the number of museums and galleries in the UK is unavailable, but the sources available indicate that the sector is substantial. There are currently almost 1,800 museums and galleries in the voluntary museum Accreditation quality standard scheme operating across the UK with an unknown number of sites that have chosen not to participate. The Museums Association estimates that there are approximately 2,500 museums and galleries in the UK.

Table 2: Number of museums and galleries in the UK (2013)

Country	No. of museums or galleries
England	1,335
Northern Ireland	43
Scotland	262
Wales	92
UK	1,732

Source: Accreditation Scheme (2013).

Participation in museums and galleries

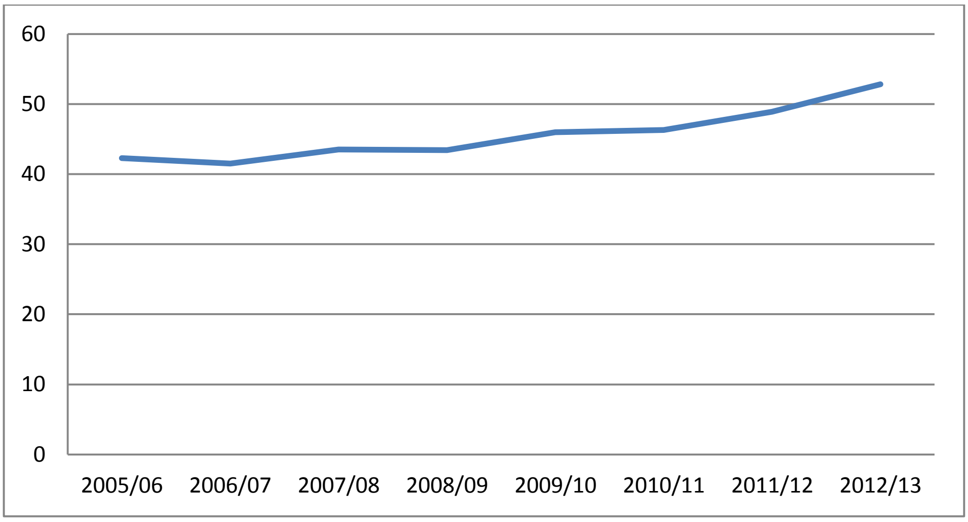
19. Participation in culture and sport in England is measured via the Taking Part Survey by DCMS. This annual sample survey of the English adult population has been running since 2005/06 and

[8] The 288 museums included in this analysis were selected on the basis that their data was publically available, and that visitor figures for 2008 and 2012 were available. This allows comparison over time of a *constant sample* of organisations and by comparing like-with-like we can be more confident that any perceived differences over time are not due to sample bias (e.g., by the inclusion or omission of a large site).

captures data on the frequency of physical and digital participation in a whole range of cultural activities including the arts, libraries, heritage and museums and galleries.

20. When the survey began in 2005/06, just over two-fifths (42.3%) of English adults had visited a museum or gallery in the previous 12 months. By 2012/13, this proportion had reached over half of all adults (52.8%) after almost seven years of continuous increases.

Chart 1: Proportion of adult population in England visiting a museum or gallery in the last year 2006/07-2012/13 (%)



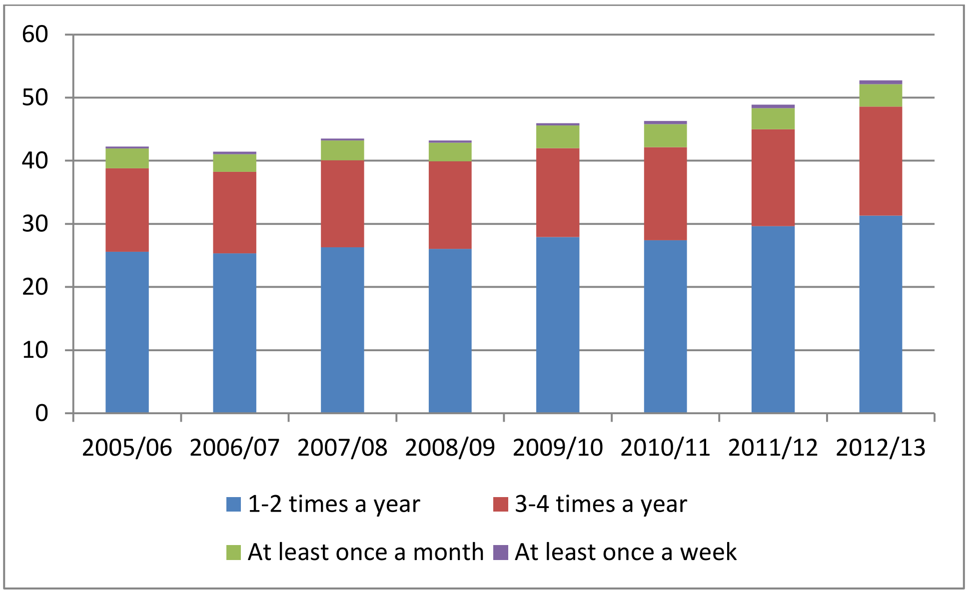
Source: Taking Part Survey, DCMS.

21. The proportion of the population participating varies across England. In 2012/13, the highest proportion participating was in London (57.4%) and the lowest was in the West Midlands (47.5%). Despite this variation, the overall trend within each English region since 2005/06 has been for participation to increase.

22. Participation in England continues to vary by other factors including socio-economic background and employment status. In 2012/13 over three-fifths (61.6%) of those from the highest socio-economic groups had visited a museums or gallery compared to two-fifths (39.5%) of those from the lowest socio-economic groups. Those working are also more likely to have visited a museum or gallery in the last twelve months than those who were not working (57.3% and 46.1% respectively).

23. The survey data also indicates that the frequency of visiting is also increasing – the proportion of the population visiting a museum 3-4 times in the previous 12 months significantly increased from 13.2% in 2005/06 to 17.1% in 2012/13. With a greater proportion of the population participating regularly, it may be that these individuals are less likely to fall out of participation.

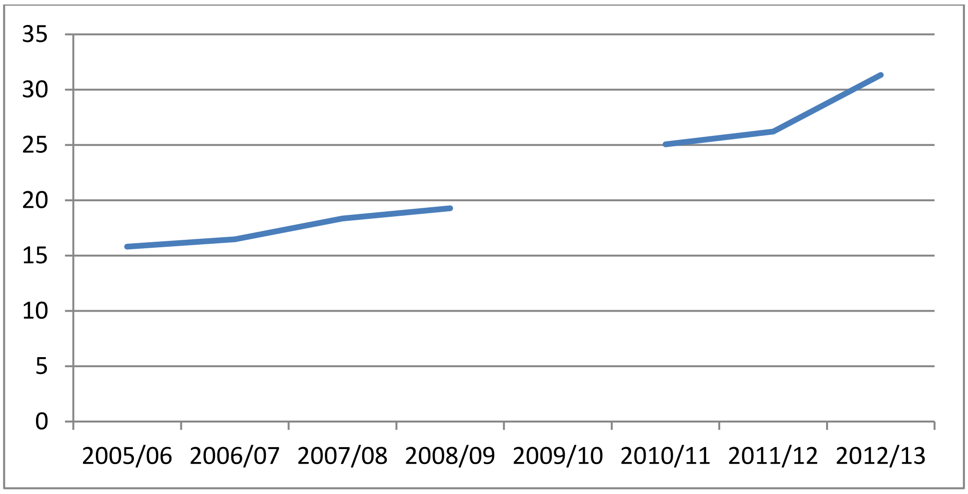
Chart 2: Frequency of museum and gallery visiting in England, 2005/06-2012/13 (%)



Source: Taking Part Survey, DCMS.

24. The Taking Part Survey also measures digital participation in culture, through visiting museum or gallery websites. Growth in this area has been significant since 2005/06 when only 15.8% of adults in England had visited a museum or gallery website in the previous twelve months. By 2012/13, this had almost doubled to around a third of all adults (31.3%).

Chart 3: Digital participation in museums and galleries in England, 2005/06-2012/13 (%)

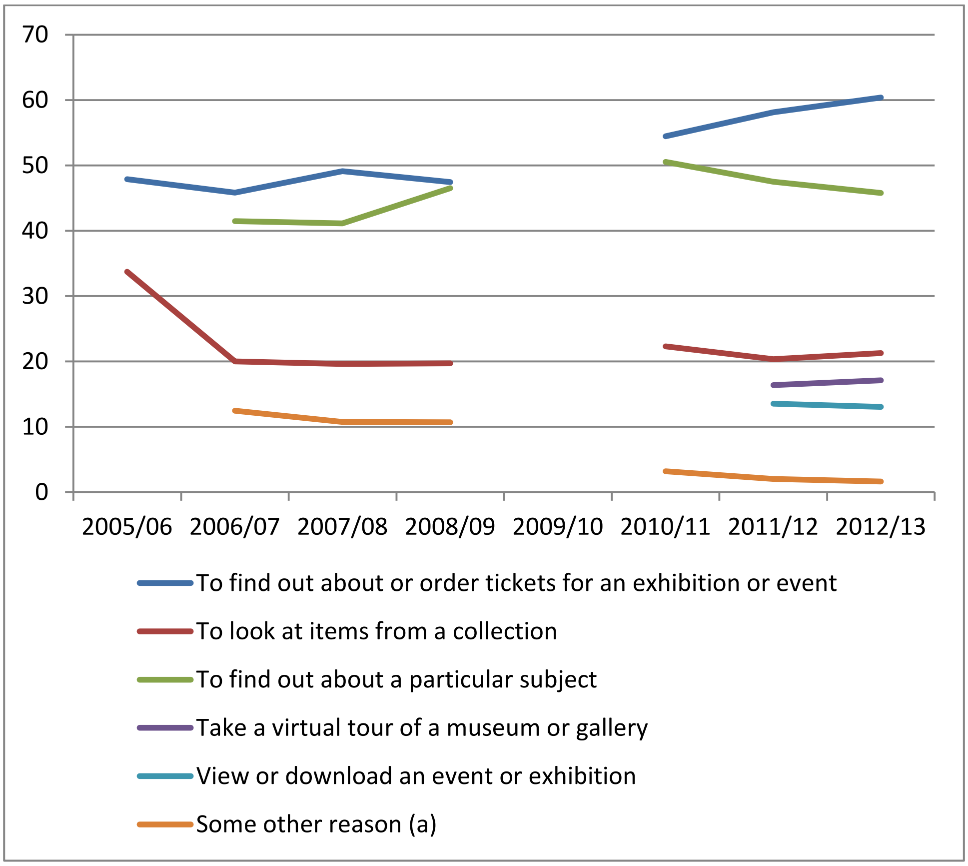


Source: Taking Part Survey, DCMS.

25. The survey showed varied reasons for visiting museum and gallery websites. The most common reason throughout the survey period was to find out about an event / exhibition or to order tickets. But, as websites and mobile technology has developed so has consumer behaviour. The digital presence of museums and galleries has become more interactive, allowing engagement with the visitor to move from relatively simple information provision about opening times or ticket prices, to deeper engagement with exhibitions and artefacts. To try and capture this

evolving complexity of behaviour, additional question responses have been added to the survey. Data now available shows that in 2012/13, of those that visited museum or gallery websites 17% had taken a virtual tour and 13% had viewed or downloaded an event / exhibition.

Chart 4: Reasons for visiting museum and gallery websites in England, 2005/06-2012/13 (%)



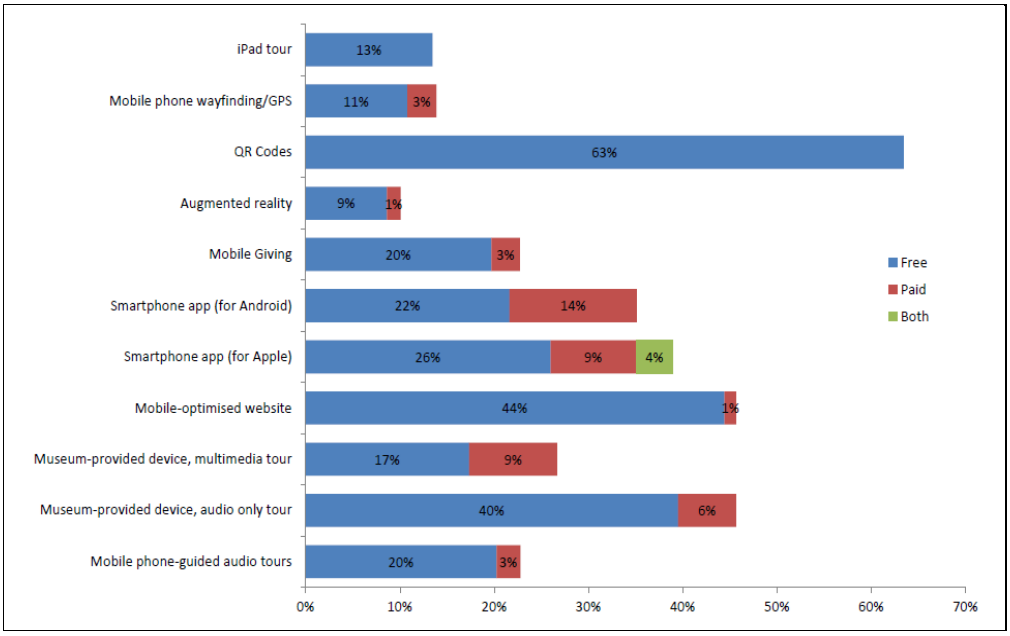
Source: Taking Part Survey, DCMS.

Note: no data on digital participation was collected in 2009/10

26. Museums themselves are continuing to invest in their digital offer. A 2013 survey by the Museums Association found that 50% of responding museums had a mobile offer for visitors and that a further 19% intended to provide one within the next 12 months. The most common current mobile offer was QR codes – provided by 63% of those institutions with a mobile offer. A small proportion of respondents provided more immersive mobile experiences for visitors, including iPad tours (13%) and augmented reality (10%). However, provision was not found to be consistent across the sector - larger institutions were much more likely to have a mobile offer than smaller ones.[9]

[9] Museums Association (2013), *Mobile Survey 2013*, London: Museums Association. Available online at: www.museumsassociation.org/museum-practice/14102013-mp-published-mobile-survey-2013-results (checked on 17/11/2013).

Chart 5: Mobile technologies currently provided to visitors, 2013



Source: Museums Association, 2013

Base: all those responding institutions providing a mobile offer to visitors

Conclusions

27. Since 2008, times have undoubtedly been difficult for museums and galleries. In many cases reductions in grant funding have meant enforced changes in staffing levels, programming and opening hours. As household incomes have fallen in real terms, museums and galleries have found themselves competing not only for visitors' leisure time, but also just to maintain their share of household disposable income.

28. Despite these difficulties, there are some encouraging signs for the sector. The proportion of the population visiting museums and galleries continues to rise and those who do visit, do so more frequently than before. Visitor numbers overall, and at many individual sites, have increased over the period and income from private giving, trust and foundations and business investment is also increasing. New investments in providing opportunities for digital engagement are creating an enhanced experience for visitors and opening museum collections to new audiences.

29. However, there is some concern that the growth in visitor number and philanthropic revenues is driven by the larger museums and that small and medium sized sites lag behind. More detailed investigation into trends in visitor numbers, participation and income generation in smaller and regional museums is needed to better understand the state of the sector.

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Acknowledgements

A.N.D

The support of A New Direction (London) in assisting my participation in the EGMUS network and the Paris meeting is gratefully acknowledged.

A New Direction connects children, young people and education with the best of arts and culture in London. Find out more about their work at: www.anewdirection.org.uk

Annex: Data Tables

Table 3: Proportion of the adult population visiting a museum or gallery in England, 2005/06–2012/13 (%)

Year	Proportion visiting a museum or gallery in previous year (%)	Range (+/-)	No. of responses
2005/06	42.3	0.7	28,117
2006/07	41.5	0.8	24,174
2007/08	43.5	0.7	25,720
2008/09	43.4	1.0	14,452
2009/10	46.0	1.9	6,097
2010/11	46.3	1.0	14,102
2011/12	48.9	1.2	9,188
2012/13	52.8	1.3	9,838

Source: Taking Part Survey, DCMS

Table 4: Frequency of adult visiting to museums and galleries in England, 2005/06–2012/13 (%)

Year	2005 / 06	2006 / 07	2007 / 08	2008 / 09	2009 / 10	2010 / 11	2011 / 12	2012 / 13
1-2 times a year	25.6	25.3	26.3	26.1	27.9	27.4	29.6	31.3
3-4 times a year	13.2	12.9	13.8	13.9	14.1	14.7	15.3	17.2
At least once a month	3.2	2.8	3.2	2.9	3.6	3.6	3.4	3.5
At least once a week	0.3	0.4	0.3	0.4	0.4	0.5	0.5	0.6

Source: Taking Part Survey, DCMS

Table 5: Digital participation in museums and galleries in England, 2005/06-2012/13 (%)

Year	2005 / 06	2006 / 07	2007 / 08	2008 / 09	2009 / 10	2010 / 11	2011 / 12	2012 / 13
Museum or gallery website	15.8	16.5	18.3	19.3	-	25.0	26.2	31.3
Library website	8.9	9.6	10.4	10.9	-	15.5	16.2	16.9
Heritage website	18.3	18.9	21.0	21.3	-	26.7	28.6	31.3
Theatre or concert website [6]	30.5	32.2	34.6	35.3	-	42.6	32.2	30.3
Archive or records office website	9.7	10.5	11.0	11.0	-	10.9	11.6	13.5
Sport website	26.1	27.9	30.6	31.3	-	36.4	37.6	40.1

Source: Taking Part Survey, DCMS Note: this data was not collected in 2009/10.

Table 6: Reasons for visiting museum and gallery websites in England, 2006/07-2012/13 (%)

Year	2005 / 06	2006 / 07	2007 / 08	2008 / 09	2009 / 10	2010 / 11	2011 / 12	2012 / 13
To find out about or order tickets	47.9	45.8	49.1	47.5	-	54.5	58.1	60.4
To look at items from a collection	33.7	20.0	19.6	19.7	-	22.3	20.3	21.3
To find out about a particular subject	-	41.5	41.1	46.5	-	50.5	47.5	45.8
Take a virtual tour of a museum or gallery	-	-	-	-	-	-	16.4	17.1
View or download an event or exhibition	-	-	-	-	-	-	13.5	13.1
Some other reason [a]	-	12.5	10.7	10.7	-	3.2	2.0	1.6

Source: Taking Part Survey, DCMS

Notes: this data was not collected in 2009/10; [a] Due to a major change in the response list in July 2011, the figure for 'other reason' is not comparable to previous figures.