

The Mendoza Review: an independent review of museums in England

Neil Mendoza

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Introduction by Neil Mendoza



England has world-class museums of exceptional reputation. Over half the population visited at least one last year. Three of our national museums are in the top ten most visited museums in the world.¹ All of the top 10 visitor attractions in the UK are English museums, or places that include museums and galleries as a part of their primary offering.²

This Review was undertaken in response to the *Culture White Paper* in 2016, which called for "a wide-ranging review of national, local and regional museums, working closely with Arts Council England (ACE) and the Heritage Lottery Fund (HLF)". It looks at what the national infrastructure for museums is and what it could and should be; the museums sponsored directly by government; and the challenges and opportunities for all of England's museums. It has been a fascinating experience, and an honour, to lead.

In completing our research we have travelled all over England, visiting museums large and small, urban and rural, international and local. We have seen museums of science, art, and social history, of industry and agriculture, of trains, public transport, planes and ships. We have visited many different types including sculpture parks and regimental museums, museums about pencils, lawnmowers and gasworks, a museum based in a colliery, a former workhouse, and a marine watch house. The personalities and missions of, for example, the National Portrait Gallery, the Mary Rose Museum in Portsmouth, Vindolanda by Hadrian's Wall, the Hepworth Wakefield, and the Oxford Museum of Natural History are all wonderfully different.

Museums are managed, sponsored and led in different ways: as well as being government-sponsored, they can be controlled by local authorities, the armed services, by universities, or they can operate as independent charities. The National Trust and English Heritage, for example, operate 159 museums between them.

Museums use their collections and knowledge to support society in direct ways. They bring people together and promote community cohesion; they support learning, tailoring their programmes to the curriculum and local education priorities; they assist scholarly research through partnerships with universities; they can promote better health – for example, using collections to work with patients with mental health issues; and they employ and nurture a wide range of skilled people. They also offer spaces where we can experience beauty and understand our place in the world.

It is as a consequence of all of these factors that our museums are integral to placemaking and economic regeneration, domestically and promoting Britain on the world stage through their partnerships and exhibitions with museums in countries such as China, Brazil and India.

¹ British Museum no.3, National Gallery no. 4, Tate Modern no.6. The Art Newspaper – Visitor Numbers 2016, <http://theartnewspaper.com/news/visitor-figures-2016-christo-helps-12-million-people-to-walk-on-water>. More information on the national museums' visitor figures can be found in the Strategic Review of DCMS-sponsored Museums at <https://www.gov.uk/government/publications/strategic-review-of-dcms-sponsored-museums>

² Association of Leading Visitor Attractions (ALVA) – Visits made in 2016 to visitor attractions in membership with ALVA, <http://www.alva.org.uk/details.cfm?p=423>

Above all, museums are responsible for collections – not just for the present, but for future generations. Although this is an obvious point, it is one that imposes particular challenges.

I recognise that in recent years difficult decisions have been made in every area of public spending. Our comprehensive research has determined that total government funding nationally for museums over the last decade has been broadly flat. However, there have been significant changes in the pattern of this funding and the impact of these changes has been felt differently in different areas of the country. This has presented new, difficult and present challenges for museums, particularly those run by local authorities. However, we have also seen that many museums have actually increased their overall resilience by altering their operating models.

We have also seen the opening of new museums, as well as the ambitious relaunch of existing places. This is evidence of a strong, dynamic sector. The breadth and quality of exhibitions and programming of England's museums have been transformed over the past 25 years. In adapting their operations many museums provide a richer experience for visitors. Like other cultural organisations, museums have become more entrepreneurial, seeking other forms of income through restaurants, shops and educational services.

England's museum sector currently employs around 33,000 people³ who work hard to ensure the quality of the museums. They are the ones taking the strain when funding is tight. They are the ones working so hard and taking on more responsibilities. Working alongside them is a force of thousands of dedicated and passionate volunteers, giving their invaluable time, skills and commitment.

The government plays a major role in the sector through policy and funding. The key question that we are attempting to answer in this Review is:

What can government do to assist in creating and maintaining a thriving, sustainable and effective museum sector in Britain?

I have been struck by the fact that museums hold a unique cultural place in their relationship with government. The government-sponsored museums are some of the only cultural organisations in England, of any type, to hold direct relationships with central government (15 at the Department for Digital, Culture, Media and Sport [DCMS], plus the British Library, three at the Ministry of Defence, and one at the Home Office). They are also the only cultural organisations where government sets a policy of free admission. This intervention has remained a manifesto commitment for all successive governments since its introduction in 2001 – there is no similar policy for any other form of culture.

This unique relationship places great responsibility on government and those government-sponsored museums. They are locked in a cultural embrace, and together they play a vital role in influencing the health, strength, and development of England's wider museum sector.

These efforts join up with the work that both the Heritage Lottery Fund (HLF) and Arts Council England (ACE) (Arm's Length Bodies [ALBs] of DCMS) are leading across the sector. HLF has granted over £2bn to England's museums since inception, which has transformed many of the places, buildings and collections around the country. ACE has

³ DCMS internal breakdown by UK country, based on *DCMS Sectors Economic Estimates 2017: Employment – Cultural Sub-sector*

been supporting the sector since 2011; it is the development agency for museums in England, with museums now set to be designated as 'National Portfolio Organisations' alongside ACE's other sectors for the first time. The number of museums funded by ACE will increase by 140%. Government must continue to work with and support all these partners to develop the resilience, promotion and growth of the sector.

The Review

In this Review we have described the museum sector and tried to come to an understanding of the various ways the government steers, funds, and influences it. We have also established what we feel to be the priorities and outcomes that government and museums want.

This Review proposes a series of recommendations to enable a more strategic approach to the application of public funding in museums by government and its ALBs. I strongly believe that if these recommendations are implemented in full, it will make a great and positive difference to museums in England. We have presented an executive summary and recommendations on pages 9-18.

Government funds museums in many different ways. For the first time, we have identified and quantified as many of those funding streams as possible. For example:

- through the direct sponsorship of national museums by DCMS;
- by ACE;
- via the Department of Communities and Local Government (DCLG) to the local authorities that fund museums;
- from the Department for Education (DfE) via The Higher Education Funding Council for England (HEFCE) and universities;
- via the Ministry of Defence (MoD) to military museums;
- via Her Majesty's Revenue and Customs (HMRC) in tax reliefs and Her Majesty's Treasury (HMT) by grant.

DCMS is also responsible for the Heritage Lottery Fund (HLF), a major National Lottery funder of museums, and Historic England (HE), the government's advisor on heritage.

The numbers help to express the entirety of how government helps to fund England's museums. I do not believe that this calculation has been done before. For example, we estimate that the government provided total funding of approximately £844m in 2016/2017.⁴

It is unlikely that there will be significant additional money available for the sector in the immediate future. The main thrust of our recommendations is, therefore, to ensure that we use existing funding in the best way possible.

I don't believe that government should interfere, influence or direct museums in their creative and scholarly endeavours, but I do believe it should strive to create an environment that enables England's museums to do their best work.

It is increasingly important for the government and its ALBs (including the National Lottery) to distribute funding in a more joined-up and strategic fashion.

⁴See the 'Public Funding for Museums' section below for full discussion.

We have set out and delineated clear roles and responsibilities divided as follows:

- a joined-up approach from government
- a clearer museums role for DCMS
- national responsibilities for national museums
- a stronger development function for ACE
- a more effective use of National Lottery funding
- the closer involvement of Historic England

We have also set out how Local Authorities can best make use of their museums and some best practice suggestions for the sector itself.

If we are able to implement these recommendations, we believe that government will be able to achieve agreed and shared priorities, best value for public and National Lottery money, and best outcomes for museums.

We have taken and received evidence from the public, museums, sector bodies, ministers (past and present), trusts and foundations that fund museums work, a number of government departments, and people from other cultural sectors. We have had a public call for evidence, commissioned a major study of the sector from architectural historian and former Chief Executive of English Heritage Dr Simon Thurley, and procured a quantitative study of the cash inflows into the sector. This research has been a great help to this Review and we reproduce a summary of some of the findings in the Annexes.

Whilst this Review is necessarily limited to England, as cultural policy is devolved to the constituent nations of the UK, we have also met and taken advice from colleagues in Scotland, Wales and Northern Ireland.

It is important to clarify that this Review does not cover the policy of free admission to the permanent collections of national museums. We are aware that this is a major intervention in the sector and certainly influences the way it functions, and that many would like to see this policy discussed and challenged. But, because it is a manifesto commitment, it is not a part of this Review. I have come around to the view passionately argued by one national museum director, that we should be proud of this policy, one endorsed by all major political parties. Far from being concerned with charging citizens or tourists or both, we should instead proclaim to the world that, unlike in many other countries, our great national museums are open to all and free to all.

Researching this Review gave us the extraordinary benefit of seeing a great number of our nation's museums. Through these visits came the opportunity of discussions with hundreds of people, singly and in groups, throughout the United Kingdom. I am immensely grateful for the help, care, dedication and passion shown by those who work and volunteer in this sector and for the people who have influence over our museums. We have listed contributors in Annex A.

Executive Summary

This Review of the museums sector is the first to be conducted in more than 10 years. Whilst it focuses primarily on the 1,312 Arts Council England (ACE)-Accredited museums, it does consider the wider context of the sector, which encompasses approximately 2,600 museums in England. In total, this covers a vast array of museums that vary in governance, size, the nature of their collections, and their particular place in the cultural environment of our country.

It has been conducted to gain a deeper understanding of the sector, the issues it faces, and how it can be best supported by government. In particular it looks at the increase and diversification of audiences; the role museums play in developing local communities and placemaking; how museums support soft power; and, crucially, how government might help to create a resilient sector.

For the first time, this Review also shows the full amount of public funding received by the sector. Over the last 10 years, we have determined that an average of £844m per year has been invested from 11 government sources, comprising multiple funding streams. Including tax measures, this funding has remained fairly flat between 2007/08 and 2016/17, although reduced in real terms.

The review identifies nine priorities for museums today, and sets out how DCMS and its Arm's Length Bodies will work better together to create and fund an environment in which they can flourish. It also sets out what individual museums and institutions can do – either by themselves or in partnership with others – to thrive and drive improvement for the sector overall.

In this report, we aim to focus on these nine areas through each of the recommendations we make. Those recommendations will be taken forward in an Action Plan produced by ACE, the Heritage Lottery Fund (HLF), national museums and DCMS.

Adapting to today's funding environment is the most important challenge facing museums today. Over the last 10 years, although nominally maintained, funding overall has reduced by 13% in real terms, with some museums seeing larger cuts; there have also been a small number of closures over the period. Local authorities (LAs) have been particularly affected and, in response, there is an increasing move to trusts and other new governance structures. Many museums have successfully changed business models; how they programme for audiences to generate income and provide value for money; and other elements of their service.

Broadly speaking, though, museums do need to increase and diversify their income further. This will enable them to build sustainable and resilient models. At the same time, the use of existing public funding needs to be smarter to help support these objectives. Public funding is ultimately finite.

Organisations like ACE and HLF, which are the key sector funders, should streamline their funding to make it easier for museums to access the support they need and to ensure that museums that would benefit the most, in the long term, have ready access.

Growing and diversifying audiences reflects the important purpose of museums in engaging people and communities. Over half of the adult population now visits museums – up from around two in five a decade ago – a significant achievement. But those audiences are still less likely to be representative of the very young or very old, ethnic minorities, disabled, or lower socio-economic backgrounds. There is no complacency in the sector – museums are increasingly reaching out to their communities to provide exhibitions that welcome people. These include, for example, building more sophisticated partnerships to co-produce exhibitions; using new technology to collect and analyse visitor data; and gathering other evidence to understand how best to serve their visitors. In many ways, national museums have spearheaded these approaches, and provided support to museums outside London to improve access all over the country. This work needs to continue and develop as further best-practice techniques are established and economies of scale established.

Dynamic collections curation and management are the fundamental point of museums – to protect and take care of the collections they hold, and to make them accessible to the public, not just physically, but meaningfully as well. This is not without its challenges: buildings maintenance backlogs (including insufficient storage) are a common issue, as is less available curatorial time and expertise, and the ongoing need for a sensible approach to both growing and rationalising collections. There are good examples of where sharing skills and infrastructure can help to overcome these issues; this is a particular area where a strategic framework for how the national museums' work with the rest of the sector will benefit museums across the country.

Contributing to placemaking and local priorities helps museums play a part in their communities and in local decision-making, as well as leveraging investment in culture to also deliver on priorities such as health and wellbeing. There is increasing evidence to show that cultural institutions contribute a great deal to the local economy, to the wellbeing and education of its residents, and to attracting tourists and businesses to the area. Museums are especially able to do this because of their position as a civic space and their collections, which connect people to place. To encourage this work it is important that museums have and use consistent, statistically robust methods to measure economic and social impact.

Delivering cultural education has benefits for schoolchildren as well as helping to make the adult museum audiences of the future. Museums can and do support pedagogy, enhancing the theory and practice of formal learning and the curriculum, as well as engaging children with development – particularly around their social history and place in the world.

Developing leaders with appropriate skills and diversifying the workforce are long-standing concerns of the museums sector; they must be tackled successfully if museums are to adapt to reduced public funding and encourage more diverse audiences. The skills needed for a museums career are changing, with greater emphasis now on flexibility and collaboration, business and digital, commercial, marketing and fundraising. Volunteers are still of crucial importance in keeping museums running, although routes to entry into the sector need to expand to offer greater opportunities to a wider range of people, particularly reflecting the make-up of the local communities they serve.

Digital capacity and innovation is an area where museums have been slower than other arts and cultural sectors to develop. Beginning with senior leadership, but encompassing upskilling people in numerous roles, there is a need for greater

understanding of the wide potential of digital in museums. Examples include display and interpretation, collections, communications, data – and the need for a strategic approach to embedding tools and technologies into every aspect of museums' work.

Working internationally is of particular importance as the UK prepares to leave the European Union. EU Exit brings challenges around staff resources, loans/movement of objects and tours, as well as funding. It also offers opportunities to refresh and develop further international partnerships, look and work globally, and involve smaller museums that may not have had the confidence or encouragement to find their place in the world.

Recommendations: Shaping the Future of Museums

We set out six sets of actions for government and its Arm's Length Bodies (ALBs), including the national museums, aimed at improving the environment for museums so that individual organisations and the sector as a whole are supported in a streamlined and effective way.

A: A joined-up approach from government and its Arm's Length Bodies

The most pressing and important challenges facing England's museums today require a joined-up approach between DCMS, ACE, and HLF, as key funders of the sector. This will enable the best use of the limited resources available. The Review team recommends:

1. DCMS, ACE and HLF will work together: DCMS providing oversight, ACE providing the strategic lead for sector development, and HLF supporting through funding. The national museums will provide expertise and other resources as lead institutions in the sector. Funding and support will be directed towards the following priorities identified by the Review team:
 - a. Adapting to today's funding environment
 - b. Growing and diversifying audiences
 - c. Dynamic collection curation and management
 - d. Contributing to placemaking and local priorities
 - e. Delivering cultural education
 - f. Developing leaders with appropriate skills
 - g. Diversifying the workforce
 - h. Digital capacity and innovation
 - i. Working internationally
2. DCMS will facilitate the development of a Museums Action Plan with ACE and HLF to deliver on these priorities by September 2018. Where applicable, this will include the national museums. It will set out how they will deliver these priorities, aligning capital and resource funding, grant programmes, and support over the next four years.
3. DCMS will work with its ALBs to develop a national picture of funding and sector activity, using the intelligence to invest activity and funding strategically across the country.

B. A clearer museums role for DCMS

DCMS is responsible for: national policy and programmes of support for museums in England; providing oversight of ACE, HLF, and the national museums; and promoting the role of museums in contributing to cross-government priorities. DCMS will enable, encourage, and be accountable for the activities emerging from the Review and for ensuring that bodies work more closely together with a more strategic approach to funding, policy and programmes for museums.

Leading a more strategic approach to museums across government

The DCMS museums team will improve how it joins up within the department and across government to progress work on the priorities identified for museums. This includes working more effectively to demonstrate the impact of museums on issues ranging from placemaking and participation to community integration, education, and trade. The team will:

4. Hold ACE, HLF, national museums, and Historic England to account for the delivery of the recommendations in the Review.
5. Provide a more strategic role, and present a better offer to the sector, on a number of DCMS-led activities with which they can engage and from which they might benefit. For example, social investment funding opportunities; enhancing digital capability through the Digital Culture Project; including museums in future Tourism Action Plans; cross-cutting themes such as diversity; and the GREAT campaign.
6. Work with ACE to promote the Government Indemnity Scheme to borrowers and lenders, and ensure that it continues to deliver good value for money. This also means boosting confidence in the scheme and making sure that commercial insurance is reserved for exceptional cases. Where commercial insurance is necessary, this means simplifying the process.
7. Work with the University Museums Group to engage their museums with the museums partnership framework (see Recommendation 12).
8. Work with ACE and HLF to develop the Culture and Sport Evidence project as a tool to quantify the impact of museums. DCMS will also explore how else it can support the sector to measure its impact using consistent and credible methods.
9. Explore a local authority offer of operational freedoms with the Department for Communities and Local Government (DCLG), reflecting those granted to national museums, but set in a local context. For example, potentially giving museums remaining in local authority control more scope in financial management and reinvestment of income, and in online presence and brand identity.
10. Work with the Foreign and Commonwealth Office, British Council, Department for International Trade, and Department for Business, Energy and Industrial Strategy, together with ACE, to promote the economic impact of museums and their international work. This work will support museums and museum sector bodies seeking to tour and promote their expertise internationally, including their vital role in cultural protection and global research.
11. Continue to work with sponsored museums, ACE, and the wider museums sector to understand the impacts of exiting the European Union. In addition, DCMS will work with the Departments for Exiting the European Union and International Trade to develop solutions to concerns, mitigate risks, and identify opportunities.

C. National responsibilities for national museums

This section should be read in conjunction with the *Strategic Review of DCMS-sponsored museums*, in which the majority of the recommendations for these bodies can be found. The Strategic Review is a clustered review of the museum ALBs, exploring their status, efficiency, and effectiveness. (see <https://www.gov.uk/government/publications/strategic-review-of-dcms-sponsored-museums>)

DCMS sponsors 15 museums and the British Library, the Ministry of Defence sponsors three museums, and the Home Office sponsors one. Broadly speaking these ALBs are known as national museums because their highly valuable collections of world-class significance are looked after on behalf of the nation.

The national museums are committed to ensuring people across the country have access to their collections and, whilst there is room to extend this work, their current national footprint and impact is not always understood. They are also committed to sharing expertise with non-national museums, and there are many examples of best practice, including long-term loans to historic houses, skill-sharing programmes, some Subject Specialist Networks, and spotlight loans and partnership galleries. However, the nationals do not share information on where they are working with other museums or what they are doing, so their overall impact across the country can appear inconsistent, or be underplayed.

The Review team recognises the excellent work already taking place, but would like it to be more strategic to ensure audiences and museums outside London get what they need from the nationals. In alignment with the *Strategic Review*, and responding to the priorities set out in Recommendation 1:

12. The nationals will, through the National Museums Directors' Council (NMDC), work with DCMS, ACE and HLF in building a new 'partnership framework' to extend their reach throughout England in a more strategic way. It is expected that this will be based on an assessment of museums' and audiences' needs, informed by existing activity. It will cover areas that include: collections management, learning, working with audiences, digital, international, and commercial. The partnership framework (including implementation plan) will be in place by September 2018 and will form part of the wider Action Plan set out in Recommendation 2, with oversight by DCMS.

D. A stronger development function for ACE with museums

ACE is the public agency for the development of museums, libraries and the arts. It will become a stronger and more assertive leader of museum development throughout the sector, and will:

13. Work closely with, and through, the Local Government Association to support local authorities in their work with museums. This includes producing and disseminating best practice guidance on independent (museum) trusts. This guidance should be complete by summer 2018.
14. Develop a clear framework for identifying and responding to museums and collections at risk, in partnership with other sector bodies, including HLF with regard to capital funding and Historic England (HE) with regard to care of historic buildings.
15. Collect and disseminate key data on the sector and its health, including audience, workforce, income, indicators of resilience, and expenditure data, to inform policymaking and funding, and to provide benchmarking information to museums.

16. Deliver a more consistent Museum Development programme, to include evaluation of its success and dissemination of best practice.

ACE will also continue to:

17. Support museums to develop long term plans focused on sustainability, growth, participation and purpose.
18. Monitor the programme of museum Accreditation to ensure that it is proportionate, effective, and remains of high quality.
19. Broker greater cooperation and partnerships between museums and other arts and culture providers at a local level, including through the sharing of services.

E. A more effective use of National Lottery funding for museums

HLF and ACE will work together to share intelligence, streamline their offers to museums so it is clear to museums where they should go for different needs, and align their funding to ensure maximum impact for both. HLF will take a lead from ACE in England as the museum development body.

HLF should focus its museums funding on capital projects with a significant impact, whether major transformation or much-needed repair of valuable buildings. It should consider how to interpret 'additionality' in the contemporary context where museums need to use investment to tackle buildings conservation and maintenance backlogs, attract and maintain new audiences, and generate new funding streams.

HLF will continue to work with ACE, the Museums Association, HE and the Museums Development Programme to develop a clear framework for identifying and responding to museums and collections at risk.

National Lottery funding should support museums in a more strategic fashion. The areas to consider include:

20. Maintaining commitment to funding projects that, ultimately, improve the public offer, including high quality 'back-of-house' projects such as collections management, curation and development, storage, and digital infrastructure and digitisation of collections.
21. Strengthening commitment to funding capital projects that will improve the long-term financial sustainability of the museum, including using evaluation to understand which elements of capital improvement drive sustainability and financial success.
22. Prioritising funding in existing estate.
23. National Lottery funding should only support the creation of new museums in areas and communities with a demonstrable need for them, working with ACE to identify where this might be appropriate.
24. National Lottery funding should continue to be distributed across England, with HLF continuing to improve the geographical spread of museums' funding outside central London.
25. National Lottery funding should more actively encourage joint projects between museums of all kinds – particularly to finance shared infrastructure and other partnerships that improve museums' public offer and financial resilience.

HLF will set out their plans for addressing these recommendations in their new strategic framework to be published in 2018.

F. The closer involvement of Historic England

HE is the Arm's Length Body responsible for England's historic environment. Through its licensing agreement with the English Heritage Trust, this includes ultimate responsibility for 34 museums. It will play a more active role in the sector and:

26. Work with ACE and HLF to review the maintenance and conservation issues for museums located within listed buildings, and how best to support them.
27. Work with key stakeholders to produce recommendations for DCMS early in 2018, which will improve the long-term sustainability of the archaeological archives generated by developer-funded excavations.

Reflections on what the sector can do

The Review team has compiled two further sections of suggestions for LAs and museums to consider. The Review has no specific powers to effect change here, and recognises that much of this thinking will be familiar to the sector. These are the themes and ideas that came out most strongly from the consultation and fieldwork carried out by the team. It is a potentially useful synthesis of our findings in relation to what is needed to support or run a successful museum today.

What can local authorities do to support thriving museums?

Museums have a central role in both the economy and community of a place, bringing in vibrant businesses, residents and tourists, and seeking to understand and reflect the stories of people, past and present, who have made a place their home. Examples such as the Hepworth Wakefield, which won the Art Fund Museum of the Year 2017, have shown how galleries and museums contribute to local authorities' (LAs) priorities, including placemaking, community integration, educational attainment, economic regeneration, and improving health outcomes. This Review recommends that LAs make the most of their museums by considering the following suggestions:

1. Developing a cultural strategy, drawing on best practices and evidence that demonstrate how museums support local priorities and how councils can best support museums, even when revenue budgets are under pressure.
2. Supporting museums in forming partnerships with local education, health and culture providers to improve the public offer and to make potential savings. This might include brokering relationships with decision-makers; helping museums to measure their impact in order to deliver the evidence other organisations need; and publicly championing the role of museums in public life.
3. Ensuring that the Local Enterprise Partnership (LEP) between the LA and businesses includes museums as part of the local economic growth agenda, as well as in support of the cultural offer, in order to promote tourism and economic regeneration.
4. Brokering other effective partnerships for museums with local businesses.
5. Recruiting and developing excellent museum leaders with appropriate skills, including business management, fundraising, a commitment to growing and diversifying audiences, delivering cultural education, placemaking and partnerships – and then giving them freedom to operate.
6. Reducing the barriers to enterprise for museums and actively supporting and encouraging their efforts to generate income. For example, allowing museums to retain commercial profits; granting them communication and digital freedoms; and considering how to allow museums to manage their self-generated income and reserves across financial years.

Many existing museums have had significant past public investment. LAs that are no longer able or willing to support their museums should try to find alternative sustainable futures for them, including considering whether they would better fulfil their functions outside the council. Where a trust or other new model is appropriate this should be with genuine independence managed by appropriate and effective governance arrangements; availability of support for senior staff involved in the transition; and a built-in level of risk appetite that allows museums the flexibility they need to innovate, adapt and increase income.

Best practice for museums

This Review recognises that all museums – national, LA, independent, and university – are different, and that success relies on clear purpose and a combination of creative and engaging public programmes, to attract audiences and embody a strong sense of place. This also requires first-rate leadership, political support and excellent collections care. The following are recommendations that all museums might like to consider. They are not a comprehensive guide, but rather lessons we have learned along the way that we hope are helpful.

Useful guides to museum best practice do already exist; we recommend both the Association of Independent Museums' (AIM) *Hallmarks of Prospering Museums* and the Museums Association's (MA) *Museums Change Lives* principles. Museums should also follow and build into their practice authoritative new research, for instance: the *Diversifying Museum Visitors* project that is currently in progress, led by AIM and ACE; guidance from the Clore Leadership Programme on good governance; and a forthcoming review from the MA of their disposals guidance.

1. **Clarity of purpose:** Museums must be clear about why they exist, the benefits they bring, and why people should visit, engage, fund and support them. All activity should help fulfil the museum's purpose.
2. **Business planning:** Museums need to be cultural enterprises. They must consider and plan how to operate in a mixed economy of public and private funding and commercial income, adapting business models where appropriate.
3. **Audience focus:** Museums should understand their audiences (including potential audiences) and how to engage them. They must remain relevant and enticing to diverse audiences if they are to attract funding and visitors.
4. **Governance:** Museums should refer to the Code of Good Governance for the Voluntary and Community Sector and AIM's Golden Rules for Good Governance.
5. **Leadership:** Museum leaders should set compelling visions; be effective operators both commercially and digitally; have strong management, business, people management, team-building skills; and museum-specific expertise. They should learn from other museums and cultural enterprises.
6. **Workforce:** Museum leaders should consider workforce development and training, with reference to *Character Matters: Attitudes, Behaviours and Skills in the UK Museum Workforce* (ACE, 2016). They should consider how to recruit and promote a diverse workforce, that represents local communities, which will help them to understand their audiences and create displays, exhibitions and programmes that interest and reflect the community.
7. **Effective collections management:** The use of collections is wide-ranging. All museums should have robust and active collections management plans that reflect this, covering object disposal, acquisition, accessibility and use, to maximise their effectiveness and purpose. This includes considering the listed museum buildings themselves alongside the collection. These buildings are, in many cases, purpose-built and an essential part of the museum's identity, experience, and the objects held in trust.
8. **Partnerships:** Museums should consider how they can work better together with other museums, culture and education institutions both locally and, if appropriate, nationally and internationally. The aim is to improve what they offer to visitors, share collections and expertise, and possibly reduce costs. They should consider how to work with other bodies at a local level, including universities, schools, and Local Enterprise Partnerships.

Museums in England Today

Gathering evidence

The Review team gathered an array of research material from the sector, funders and the public through an online call for evidence. We received over 1,600 public responses and over 30 written submissions from industry experts, museums, and sector bodies. We also commissioned architectural historian and former Chief Executive of English Heritage, Dr. Simon Thurley, to produce a state-of-the-nation report on England's museums, which has informed our work, plus additional information from ACE and HLF on their investment in museums.

The team visited museums right across England, from Vindolanda at Hadrian's Wall in the northeast down to the southwest at Wheal Martyn China Clay museum in Carthew, Cornwall. We met with the leaders of over 150 museums and the various funders and policymakers who have been most influential in museums policy and practice in recent years.⁵ We are grateful to all of them for being so generous with their time and knowledge.

The team also benefited from an independent Challenge Panel, which contributed to our thinking, and organised a series of roundtables, in London, Birmingham and Manchester, with practitioners and experts, to respond to the evidence and explore possible recommendations.⁶

It should be noted that, as per the Terms of Reference of the Review, the focus is on Accredited museums, with non-Accredited museums out of scope. However, much of what we have to say also applies to the large non-Accredited part of the sector, and the Action Plan to be developed will consider how to support the sector in its entirety.

Key facts

There are over 2,600 museums in England and 1,312 of those are Accredited – i.e. they have met standards set by ACE on how they operate, care for their collections, and work with audiences.⁷ It is estimated that the museums of England and Wales hold at least 200 million objects,⁸ with approximately 90% in storage.⁹ Accredited museums include:

- 639 independent museums (owned by registered charities and other independent bodies or trusts);
- 363 LA museums (owned and run by town, parish, borough, city, or county councils and other local authority bodies);
- 125 National Trust museums;

⁵ A full list of acknowledgments can be found at Annex A.

⁶ For more information about evidence gathering please see Annex C.

⁷ List of Accredited museums September 2017, Arts Council England.

⁸ *Collections for People*, UCL Institute of Archaeology, 2008.

⁹ *Ibid.*

- 56 university museums;
- 59 military museums (often owned and run by the armed services), including three nationals sponsored by the Ministry of Defence (MoD);¹⁰
- 34 English Heritage museums (at historic sites and properties owned and run by English Heritage); and
- 13 DCMS sponsored national museums (including museums groups) plus the British Library and two non-national museums. Their permanent collections are free to access. This group is small but includes many of the largest and best-known museums in the country. Each site in a group is Accredited separately (e.g. National Museums Liverpool includes seven separate museums and galleries).¹¹

The southeast has 234 Accredited museums – the highest number within a single region in England – followed by 199 in the southwest. The northeast has the lowest number at 64, followed by the East Midlands with 106.¹²

55% of the English public live within walking distance of at least one museum.¹³

Over half of UK adults go to a museum every year, increasing over the last decade from 42% in 2005/06 to 52% in 2016/7.¹⁴ In 2015, 71 million visits were made to British museums,¹⁵ including 48 million to the DCMS-sponsored museums (of which 22 million were by people from overseas).¹⁶

Around 33,000 people work in the museums and galleries sector in England.¹⁷ The Museums Association estimates there are a further 93,000–95,000 volunteers.¹⁸

The average total public funding in museums taken over the past 10 years, including National Lottery funding and tax reliefs, is around £844m/year.

Research suggests that museums in England generate £2.64bn in income (including trading income, fundraising, donations and grants-in-aid) and £1.45bn in economic output (calculated by combining expenditure on wages, the profit/surplus before tax, and expenditure on depreciating assets).¹⁹

It has been estimated that the sector generates £3 of income (including earned income, income from investments, grants from charities and foundations, and donations, etc) for each £1 of public sector grant.²⁰

¹⁰ Outside the ACE accreditation scheme, there are many more military museums that nonetheless receive public funding in the form of Ministry of Defence sponsorship, most notably corp and regimental museums.

¹¹ In England, 15 of England's national museums are sponsored by DCMS, plus the British Library, three are sponsored by the Ministry of Defence, and one by the Home Office, which totals 44 sites around England. In addition, other organisations, e.g. the National Coal Mining Museum for England and regimental museums, receive grant-in-aid from central Government.

¹² List of Accredited museums 2017, Arts Council England.

¹³ Where walking distance is defined as 4km or less. *The Museums Map: Mapping access to England's museums*, Nesta, 2017.

¹⁴ *Taking Part*, DCMS, 2017.

¹⁵ *Britain's Global Future: Harnessing the soft power capital of UK institutions*, ResPublica, 2017.

¹⁶ 47.7m visitors in 2015/16, *Sponsored Museums Performance Indicators 2015/16*, DCMS.

¹⁷ DCMS internal breakdown by UK country, based on *DCMS Sectors Economic Estimates 2017: Employment – Cultural Sub-sector*

¹⁸ The MA provided The Review team with this estimate based on their research for their *Museums in the UK: 2017* report.

¹⁹ *The Economic Impact of Museums in England*, Arts Council England, 2015. Income captures all income received by the museum, including trading income, fundraising donations and grants-in-aid. Output was reached by combining expenditure on wages and the profit/surplus before tax.

²⁰ Ibid.

Public Funding for Museums

Museums generate income from different sources: public funding (including the National Lottery); commercial enterprise; and giving by individuals and businesses.

Public funding is of particular concern to us, as the aim of this Review is to focus on how government can best assist in creating and maintaining a thriving, sustainable and effective sector. Following the money has formed a fundamental part of our Review.

We have set out to sum all of the sources of public funding to the museum sector. To our knowledge this has never been done before. In fact, we hope that this method may prove useful when analysing the government's role in supporting other cultural sectors. We commissioned DC Research to collect and analyse those figures,²¹ whose findings are summarised below.

Identifying public funding sources

We have identified 16 different sources of government funding that have been granted regularly to the museum sector over the last 10 years. Some are accurate figures; others are, by necessity, carefully calculated estimates. Overall, they yield a helpful illustration of how England's museum sector is supported by government. We have included National Lottery funding and tax reliefs,²² an increasingly important source of funds.

We set out the sources of public support in detail below. Together this provides a comprehensive picture of the variety of sources of public funds for museums. We have quantified totals for the first 11 funding sources in Table 1 on p23. The further five sources have only general estimates, poor data, or are inconsistently offered.

1. DCMS:²³ principally grant-in-aid to the DCMS-sponsored museums, and includes £14m of funding provided, over the period, in rounds of the DCMS/Wolfson Museums & Galleries Improvement Fund.
2. ACE: revenue funding for a small number of exceptional regional museums, and a range of sector grants and support (see 'ACE Funding' section below). The figures in Table 1 include expenditure from the Museums, Libraries, and Archives Council (MLA) for the period 2007–2012.

²¹ For more information on methodology and data please see Annex C-1 'DC Research data availability and process issues'.

²² Tax relief is the remission of a proportion of income tax normally due on earned income. The government supports the creative industries through a number of different spending and tax measures. The museums and galleries tax relief joins a number of other creative sector tax reliefs that are offered by the government, including relief for films, high-end and children's television, animation, video games, theatre and orchestral productions.

²³ While sponsored alongside national museums and included in the *Strategic Review*, the approximate £100 million per year funding to the British Library has been excluded from these figures. It includes funding of around £2.4m annually to the National Coal Mining Museum for England provided via the Science Museum Group, so figures do not match those given for GiA in the *Strategic Review*. It also does not include approximately £250,000 per year provided by the Home Office to Seized!, the Border Force museum managed by National Museums Liverpool.

3. Ministry of Defence: grant-in-aid funding for the three armed forces service museums and support for regimental museums.
4. Local government: LAs operate their own museums, as well as supporting museums services and providing grants and contracts to other local museums.
5. Universities: the Higher Education Funding Council for England (HEFCE) funds university museums through the Museums, Galleries and Collections Fund, and universities provide direct and indirect support to their museums.
6. National Heritage Memorial Fund: NHMF is the UK-wide funder of last resort for objects and buildings at risk.
7. The Heritage Lottery Fund (HLF): UK-wide National Lottery distributor – most funding is for capital projects, with some other sector support (see 'HLF Funding' section below).
8. Historic England: funding for museums at risk, for example, to help them repair and maintain their historic buildings.
9. LIBOR funding: the proceeds from LIBOR fines have been used for grants to support the British Armed Forces and emergency services charities, including a number of museums.
10. VAT refunds: the VAT 33A scheme allows included museums and galleries providing free admission to collection to reclaim VAT. This figure has been estimated to the nearest £5m. In 2006/07 six museums were eligible, rising to 33 in 2016/17.
11. Acceptance in Lieu and Cultural Gifts Scheme (AiL and CGS): AiL enables cultural objects to be offered as payment of Inheritance Tax, and CGS enables cultural objects to be offered in return for a tax deduction; these objects are then accessioned to suitable museum collections. Figures given represent the tax-relief value of objects acquired.

Other sources not included in the table opposite

There are other sources of public funding that have not been quantified for the purposes of the figures below, as the estimates are less well-evidenced than those included:

1. Business Rates Relief: no reliable specific information exists on museums' business rates, due to the factors that go into the rateable value of each venue and differing levels of discretionary relief across local authorities, but a broad estimate has been made of approximately £23m annually.
2. Gift Aid: this data on museums charities, specifically, is not held.
3. European funding: EU funding streams including structural funds, Creative Europe, Horizon 2020, and others that have supported capital work and projects, in the UK and with European partners. The amounts involved are relatively small (estimated at approx £1m per year for regional museums and £3m per year for national museums) when compared to domestic funding.
4. The Government Indemnity Scheme: ACE estimates the value for museums not requiring commercial insurance at £15m annually.
5. HM Treasury individual grants: including grants such as £2m to support the British

Museum touring in China and £5m to help fund Manchester Museum's South Asia Gallery at Budget 2016.

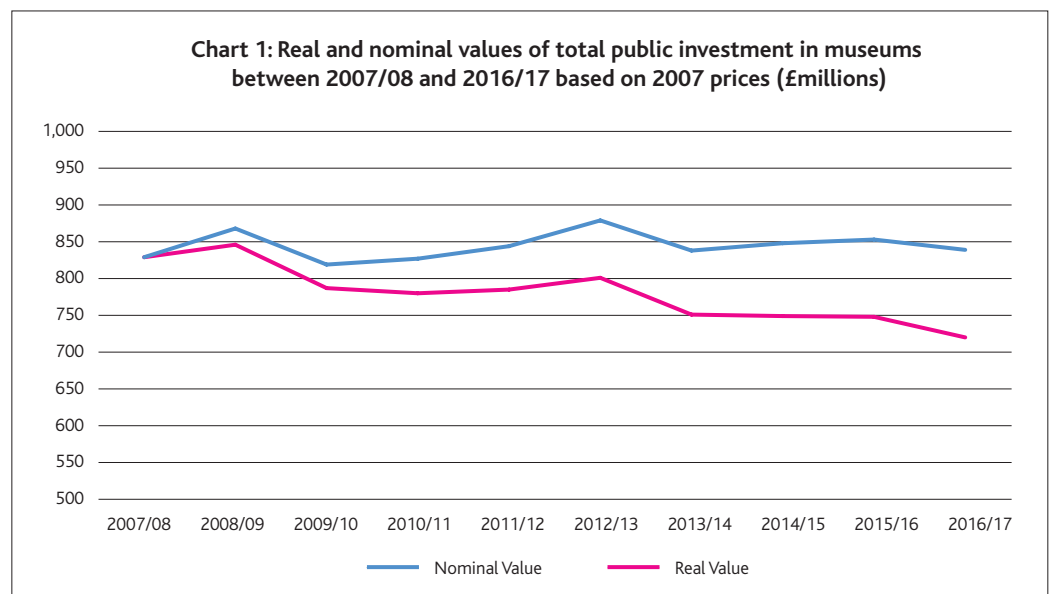
Analysing funding levels

Over the 10 years from 2007/08 to 2016/17, this identifiable public funding for museums averaged around £844m/year.

Table 1: Total public funding of museums in England by source (£millions)

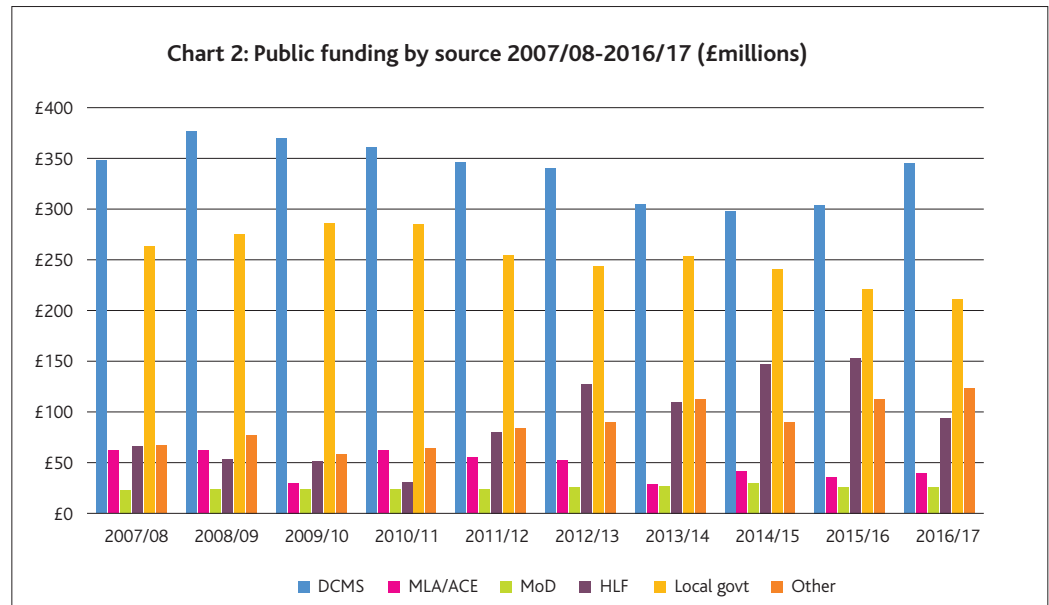
Year	DCMS	MLA (to 2010/11)/ ACE (2011/12 onward)	MoD	Local Government	Univ	NHMF	HLF	Historic England	LIBOR	VAT refunds	Cultural property reliefs (CGS/AIL)	Total
2007/08	£348	£62	£23	£263	£10	£10	£66	£1	–	£40	£6	£829
2008/09	£377	£62	£24	£275	£10	£12	£53	£2	–	£50	£3	£868
2009/10	£370	£30	£24	£286	£10	£2	£51	£2	–	£40	£4	£819
2010/11	£361	£62	£24	£285	£11	£3	£31	£1	–	£45	£4	£827
2011/12	£346	£55	£24	£255	£10	£7	£80	£1	–	£55	£11	£844
2012/13	£340	£52	£26	£244	£10	£2	£127	£1	–	£60	£17	£879
2013/14	£305	£29	£27	£254	£10	£3	£110	£1	£24	£65	£10	£838
2014/15	£298	£42	£30	£241	£10	£4	£147	£2	–	£60	£14	£848
2015/16	£304	£36	£26	£221	£11	£1	£153	£1	£13	£70	£17	£853
2016/17	£345	£40	£26	£211	£11	£3	£94	£1	£20	£75	£13	£839
Total £8.4bn for an average per year of £844m												

Nominally, the total figures for government funding each year are broadly flat over the period. In real terms, however, there has been a 13% decrease in funding over the period when taking inflation into account: in 2007 prices, from £829m in 2007/08 to £720m in 2016/17.²⁴



²⁴ Inflation has been calculated using the GDP deflators at market prices, produced by HM Treasury based on data provided by the Office for National Statistics (ONS) and the Office for Budget Responsibility (OBR).

Although total nominal funding today is similar to levels in 2007/08, the relative level of different sources has changed. Central and local government are the largest contributors, with DCMS, MOD, and local authorities providing over two-thirds of the funding. While these sources have decreased, since 2011/12 much of the decline has been mitigated by increased funding from the Heritage Lottery Fund and a significant growth in funding from tax measures.



ACE funding

ACE became responsible for museums in 2011/12, following the dissolution of the Museums, Libraries, and Archives Council (MLA). ACE is the main agency through which non-national museums in England are supported.

ACE's current museums budget, running 2015–2018, totals £118m over three years. This covers:

- Revenue funding for a limited number of exceptional non-national 'Major Partner Museums' (MPM) (£22.6m per year 2015–18).
- The museum development network (£3.2m per year 2015–18).
- Strategic funds to support museum development – for example, improving museum resilience or supporting museum touring, and targeted funding streams: the Designation Development Fund, Subject Specialist Networks, the V&A/PRISM Purchase Grant Funds, and sector support delivered via the Collections and Cultural Property team (such as Accreditation, Designation, Acceptance in Lieu, and the Government Indemnity Scheme).

Excluding MPMs (£107.6m in 2011/12–2016/17) and museum development, £89m was spent on museums awards, of which 43% went to independent museums and 41% to LA museums. The remainder was shared between national museums (including MOD museums), university museums and national bodies.

In 2016, ACE signalled its intention to integrate museums within the National Portfolio alongside other arts and cultural forms. In June 2017, ACE announced its funding commitments for 2018–22: in the museums sector there will be 57 National Portfolio Organisations (NPOs), 9 Museum Development Sector Support Organisations, and 6

museum Sector Support Organisations.²⁵ Overall, museums NPOs will receive £36.6m per annum, 9% of the total National Portfolio of funded organisations, compared to 4% in the 2015–18 portfolio. This increase of 42 organisations represents a 140% increase to the museums portfolio.

HLF funding

HLF provides funding to support the development of museums and their audiences across the UK. While HLF provides some revenue funding, it is chiefly a source of capital funding, including major builds and refurbishments. For much of the funding, museum applications are considered alongside other forms of heritage. HLF also has a UK-wide remit, although for this Review only its activities in England have been considered and counted.

Between 2007/08 and 2016/17, HLF awarded an average of £91m per year to museums,²⁶ allocating around 77% on capital projects. These ranged from small gallery refurbishments to major multi-million-pound builds and transformation programmes. The remainder was allocated to strategic investments, including programmes on resilience; digital; collections development including major acquisitions; and the Catalyst Endowments programme. 40% of its funding has gone to independent museums and 25% to LA museums.

Table 2: Public investment in museums from Heritage Lottery Fund split between capital and strategic investment (£millions)²⁷

Year	Capital	Strategic	Sub total	R1 Passes (Capital)	R1 Passes (Strat.)	Total
2007/08	£57	£8	£65	£0	£0	£65
2008/09	£39	£14	£53	£0	£0	£53
2009/10	£44	£6	£51	£0	£0	£51
2010/11	£21	£10	£31	£0	£0	£31
2011/12	£60	£19	£79	£0	£0	£79
2012/13	£90	£36	£126	£1	£0	£127
2013/14	£52	£43	£95	£15	£0	£110
2014/15	£60	£16	£76	£64	£6	£147
2015/16	£43	£6	£48	£98	£7	£153
2016/17	£0	£28	£29	£61	£4	£94

It should be noted that some care needs to be taken when interpreting HLF yearly figures due to their funding cycles (i.e. funding awarded in one year might be spent over several subsequent years). However, we can see that between 2007/08 and 2011/12, HLF awarded an average of £56m per year to museums, while from 2012/13–2016/17 it awarded an average of £126m per year. The increase shows the sector able to make greater use of National Lottery funding as central and local government funding has reduced. This has particularly benefited national museums, in receipt of £164m of HLF funding in the last 10 years, of which 75% has been awarded since 2012.

²⁵ Refers to offers from the ACE NPO announcement in June 2017, dataset publicly available from ACE, prior to funding agreements.

²⁶ This chart shows funding awards in the year that the decision is made, although actual expenditure can be over several years. It also includes Round 1 passes i.e. funding that has been allocated but is not guaranteed at this or any level. The amount of awards withdrawn following the decision is not shown. Figures may not add up due to rounding.

²⁷ *Research on the changing funding and operating models of Accredited Museums in England*, DC Research, commissioned by Arts Council England for the Museums Review, 2016.

Where does support go in England?

With so many sources, producing a complete nationwide picture of where funding goes is challenging. The figures below are an illustrative snapshot of some of the main sources of funding that can be broken down by region, covering (in some cases partially) ACE, HLF and LA expenditure between 2011 and 2015.

For example, we can consider, by region, the proportion of Accredited museums and ACE awards made to individual museums²⁸ (excluding Major Partner Museum and museum development funding awards, which are often to partnerships) in funding rounds between 2011 and 2015, as Table 3 shows. With 63 Accredited museums, the northeast was the lowest in terms of both the proportion of museums and the proportion of funding.

Table 3 shows over £1.3bn provided to museums between 2011 and 2015 by ACE, HLF, and local authorities. In most cases the proportion of Accredited museums per region and the proportion of funding are reasonably well aligned.

LAs are by far the biggest contributors. London gets the highest proportion of funding: around £69m of the HLF awards attributed to London were made to national museums, and the ACE figure for London includes £3.5m funding to the V&A Purchase Grant Fund, which is redistributed across the country.

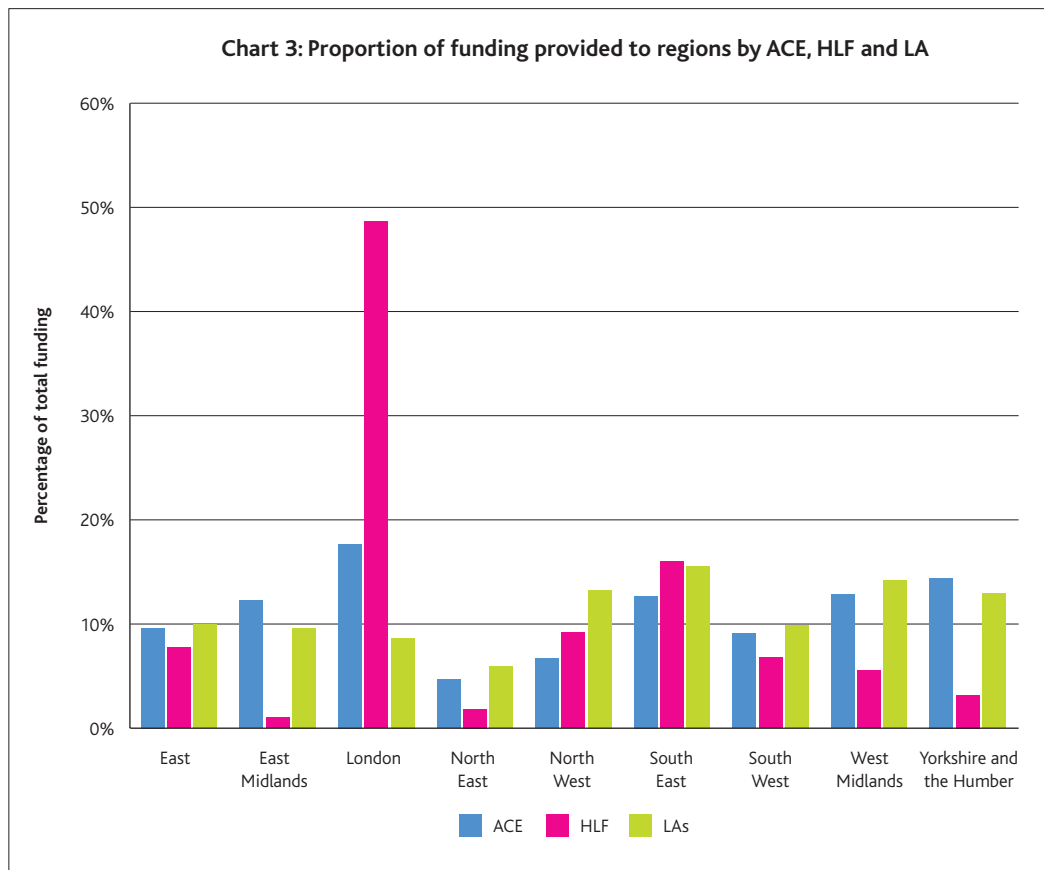
Table 3: Funding between 2011/12 and 2014/15 by English region (millions)²⁹

	No. Accredited Museums (2016)	%	ACE funding awards	HLF funding awards	LA funding	Total funding	%
East	160	12%	£5.6	£20.0	£99.1	£124.7	10%
East Midlands	99	8%	£7.1	£2.6	£95.8	£105.5	8%
London	137	11%	£10.3	£125.4	£86.1	£221.8	17%
Northeast	63	5%	£2.7	£4.8	£59.0	£66.5	5%
Northwest	140	11%	£3.9	£23.7	£131.8	£159.4	12%
Southeast	235	18%	£7.4	£41.3	£154.7	£203.4	16%
Southwest	193	15%	£5.3	£17.5	£98.2	£121.0	9%
West Midlands	135	10%	£7.5	£14.3	£140.8	£162.6	12%
Yorkshire and the Humber	142	11%	£8.4	£8.2	£128.9	£145.5	11%
Total	1304		£58.2	£257.8	£994.4	£1,310.4	

Chart 3 opposite shows how each of the three sources spread their funding across the regions.

²⁸ Covering the Resilience Fund, Designation Development Fund, and Managed Funds project, but not Museum Development or MPM awards which are often awarded to partnerships which then distribute the money further.

²⁹ *Research on the changing funding and operating models of Accredited Museums in England*, DC Research, commissioned by Arts Council England for the Museums Review, 2016.



In both the 2015–18 and forthcoming 2018–22 funding settlements, ACE has made deliberate efforts to significantly improve the relative amount of funding it provides outside London. Table 4 shows how the increase in funded organisations (including Sector Support Organisations as well as individual museums) from 2018, described above, has been spread between regions, with all of them receiving a significant increase. Over the last five years the proportion of ACE’s National Portfolio funding outside London, across all art and cultural forms, has increased to around 60%; for museums, the National Portfolio funding outside London will be significantly higher, at 91%.

Table 4: ACE Portfolio grants by region 2015-18 compared to 2018-22 (£millions)

	2015-18	2018-22	Percentage change
East	£9.3	£14.7	58%
East Midlands	£3.5	£8.4	143%
London	£6.9	£13.6	97%
Northeast	£12.0	£20.4	70%
Northwest	£8.9	£15.0	68%
Southeast	£8.0	£14.1	76%
Southwest	£10.9	£19.1	75%
West Midlands	£8.8	£16.0	82%
Yorkshire and The Humber	£13.8	£25.3	83%

HLF's funding for museums in London has been higher relative to its overall funding spent in London, reflecting its investment in the national museums. For example, in 2015/16, 17% of HLF's overall funding was directed to London, but 31% of its museums funding in England went to London. However, this was a reduction compared to 43% in 2011/12, as HLF is also working to increase the share of its funding invested outside London.

The national museums do receive a significant share of public funding, some from HLF but mainly from DCMS. There is a general perception that these museums are all based in London; clearly, these world-class museums do have a significant presence in London, but their work, buildings and operations are spread widely across England. Table 5 details the locations for the seven national museums that have a presence outside London.

Table 5: national museums' sites outside London

Museum	Locations outside London	Sites outside London
National Museums Liverpool	Wholly	World Museum, Liverpool Walker Art Gallery, Liverpool Museum of Liverpool, Liverpool Merseyside Maritime Museum, Liverpool International Slavery Museum, Liverpool Lady Lever Art Gallery, Port Sunlight Sudley House, Liverpool Manages Seized!, Liverpool (on behalf of Border Force)
Royal Armouries	Mostly	Royal Armouries, Leeds Fort Nelson, Hampshire
Science Museum Group	Mostly	Museum of Science and Industry, Manchester National Railway Museum, York Locomotion - The National Railway Museum at Shildon (joint venture with Durham County Council) National Science and Media Museum, Bradford Science Museum at Wroughton, Wiltshire Oversight of National Coal Mining Museum for England, Wakefield
Imperial War Museum	Partially	Imperial War Museum North, Manchester Imperial War Museum Duxford, Cambridgeshire
Natural History Museum	Partially	Tring, Hertfordshire
British Library	Partially	Boston Spa, West Yorkshire PLR office, Stockton on Tees
Tate	Partially	Tate Liverpool Tate St. Ives Barbara Hepworth Museum, St. Ives

The national museums also have presences in many other cities and towns outside London: permanent (e.g. the British Museum partner galleries), long term (e.g. many loans), and short term (e.g. touring exhibitions).

Changes to the funding landscape

Over coming years, the funding landscape for museums will continue to change, as it has in the past. There is pressure on National Lottery receipts, which is likely to affect HLF grants – already the object of much competition. There is also continued pressure on central and local government finances.

More positively, museums have already benefited from inclusion in the ACE National Portfolio. From 2018, they will be eligible to apply for new open-access funds, ACE's Grants for the Arts and Culture, worth over £200m per year and supporting a wide variety of organisational and engagement activities. HM Treasury is legislating for the Museums and Galleries Tax Relief³⁰ on permanent and touring exhibitions, which once in effect will apply to expenditure from April 2017 and is expected to benefit the sector by £30m annually.

Sixteen different income streams is a lot; perhaps if we were creating a programme of public support for museums from scratch we would reduce the number of funding bodies. However, our Review recommendations aim to be realistic and actively encourage the major funding players and decision-makers to work closely together, to ensure a joined-up approach to meeting the priorities we set out in the next chapter.

³⁰ At the time of writing, the Finance Bill 2017–19, which includes this measure, is going through the House of Commons.

Understanding and Addressing the Priorities for Museums in England Today

Our evidence gathering produced a huge array of issues and topics to consider. Some are, however, more pressing than others, and we have drawn up a list of priorities that we feel are most important for museums in England today.

The Review team recommends that these priorities should be the focus of funding, policy and programmes for the sector, as set out in the recommendations in the following sections:

- I. Adapting to today's funding environment
- II. Growing and diversifying audiences
- III. Dynamic collection curation and management
- IV. Contributing to placemaking and local priorities
- V. Delivering cultural education
- VI. Developing leaders with appropriate skills
- VII. Diversifying the workforce
- VIII. Digital capacity and innovation
- IX. Working internationally

DCMS should be ultimately accountable for the delivery of the recommendations in the Review, working in the main through its Arm's Length Bodies (Recommendation 4).

I. Adapting to today's funding environment

Our research suggests that many museums rely, to a large degree, on public funding. Around 59% of Accredited museums rely on some form of public funding, not including National Lottery. Reliance is lower for independents, which for many years have earned their income via a mix of paying visitors and generous donors. Given the trend towards reducing public funding (which, at least in terms of LA funding, is likely to continue) the question that has been asked, and is therefore of great interest to this Review, is: Is the sector in crisis? This was the position reflected in submissions from ACE, the Association of Independent Museums (AIM), Museums Association (MA), and other organisations and individuals.

There is no question that the sector has faced challenging times, financially. It has had to become more sustainable, especially where reductions to funding have been drastic and quick. Many museums are doing this well by changing their business models; carrying out programmes leveraging capital investment to transform their ability to use collections and attract audiences in order to generate income; and creating new partnerships that help money go further.

A small number have been unsuited to such change, or unable to adapt in time. The Review team acknowledges the many people who, in cases of recent closures, fought hard to keep their museums open. Each loss is sad for the employees, volunteers and people who used, valued, and loved the museum. There are also wider impacts, where closures have meant a collection being placed at risk, a loss of local heritage, or reductions in services to the community.

On the other side, the Review team saw a number of cases where new museums have opened, showing signs of growth and innovation.

Overall, the team found a sector that is facing its challenges creatively, continuing to care for collections and welcome visitors all over the country. This section sets out the changes to funding and how the sector has managed them. With tight limits on public funding, it is important that it is all used wisely; DCMS, ACE and HLF need to work closely together to ensure this, funding museums strategically, efficiently, and in accordance with agreed priorities (Recommendation 1).

Meeting challenges to sustainability

The effect of funding changes on museums has varied widely, with a small number experiencing reductions in public funding of 50% or more, while others have dealt with lower reductions. Depending on the scale, museums trying to absorb a loss of public funding can face difficult choices in cutting spend. Museums have taken action, including, but by no means limited to, reducing opening hours, cancelling outreach work, and losing professional expertise, such as replacing permanent posts with short-term roles, or professional posts with unpaid posts.³¹ Some such changes enable a service to continue, even if reduced; but done hurriedly, these measures risk damaging the reputation and relationships that museums rely upon for support, and further decreasing the diversity of the museums' workforce and audiences.

The fixed costs of museums are a particular challenge. Many are housed in historic buildings, and a significant number have considerable maintenance backlogs that they cannot afford to address and yet threaten the museum's ability to stay open. In any case, it was observed to the team by one respondent that, given the ongoing need to care for buildings and collections, a closed museum can be no cheaper to run than an open one. To start to address this, the Review team recommends that National Lottery funders should prioritise investment in existing estate (Recommendation 22) and fund high-quality 'back of house' projects (Recommendation 20). We have also asked HE to look at the maintenance and conservation issues for institutions located within listed buildings (Recommendation 26).

The team learned that many museums have been able to respond well to financial challenge and find mitigating solutions. We are, of course, aware that funding bodies and local authorities prioritise their expenditure in different ways and operate within different financial constraints. Therefore, it is likely that funding for some museums will continue to be tight in some parts of the country.

We have asked ACE to work with other sector bodies to develop a framework for identifying and responding to museums and collections at risk (Recommendation 14).

For the Review, ACE commissioned a report looking at the factors that result in a museum being more likely to respond with resilience to problems.³² The chief

³¹ *Museums Survey Report 2017*, Museums Association, 2017

³² *Research to understand, and learn from, museums that have experienced significant change in the past five years*, Pomegranate, commissioned by ACE for the Museums Review, 2017

characteristics are: anticipation of problems; and the making of pragmatic plans that integrate collections management, community engagement and commercialisation. Strong and open leadership, committed support from employees and volunteers, and a shared organisational ambition are crucial, as is the gathering and analysis of good management information.

Pressures are difficult to manage but can be a basis for museums to transform, find opportunities to use their buildings and collections in new ways, build new partnerships, and focus more closely on what brings audiences through the doors.

Derby Museums Trust

Managing reductions in local authority funding

Derby Museums was a department of Derby City Council until 2012, when it became an independent charitable trust. Its new governance model provides greater entrepreneurial and commercial freedom, along with opportunities to build local and national partnerships. However, it was based on a very optimistic business plan that significantly over-estimated the self-generated income that could be achieved.

Derby Museums has experienced a 30% cut to its funding from the council since 2015, and there remains the risk of the removal of funding for culture in Derby altogether. The challenge is balancing short-term revenue funding gaps alongside delivering a major capital project – the £16.4m redevelopment of Derby Silk Mill as the Museum of Making – and securing the sustainability of the museums for future generations.

Investment in fundraising has had positive results for both visitor experience and revenue funding gaps via a combination of trusts and foundations, individual giving schemes, and last year holding their first fundraising ball. Recent success with a Heritage Endowment Grant has the potential to be the first step towards creating an endowment to help secure its future.

The development of mutually beneficial partnerships with local industry is key to its approach. Since 2012, Derby Museums has developed a working relationship with Rolls-Royce, which has its global headquarters in Derby and employs 12,000 people locally. Rolls-Royce has provided representation on the trust board, sponsorship for engagement programmes, volunteers for ongoing projects, and a significant object donation to the Silk Mill project.

Sadly, it has not been possible to save some museums. The Museums Association tracked 40 closures between 2005 and 2014. This figure counts a number of facilities that are not Accredited museums, including commercial exhibition space, a public library display space, historic houses, private museums that may not have closed for financial reasons, and the Hamlyn Library at the British Museum.

This is not to say that there have not been worrying closures. LA museums appear to be most at risk, with 11 closing in 2016, including five in Lancashire. However, the number of closures is neither vast nor accelerating. Less drastically, some museums may survive but the measures taken to do so may reduce their quality and impact; 149 museums moved out of ACE Accreditation between February 2012 and February 2017, although at the same time, 53 became Accredited.

Even in a time of reducing public funding, there are new museums. Over the same time period as the MA Closures Map,³³ the number of independent museums grew by 3%.³⁴ Museums announced or opened in recent years include the Heath Robinson museum in Pinner, the Swedish photography organisation Fotografiska intending to create a London Museum of Photography, and London's Victorian post railway being brought back into operation as The Postal Museum. Outside London, the Great Central Railway Museum in Leicester, Stories of Lynn in King's Lynn, Aerospace Bristol showcasing Concorde, and The Etches Collection – Museum of Jurassic Marine Life in Kimmeridge have opened, and a museum in Southend dedicated to the Thames and maritime heritage of the estuary announced. These are promising signs of a sector that overall continues to do well.

Improving the impact of ACE and HLF funding

Use of public funds needs to be more strategic. This means that whatever the source, it is directed at agreed priorities and based on shared intelligence, including a good understanding of where ACE and HLF funds are already invested. ACE and HLF need to work together on aligning funding to make sure all of the sector's needs are covered; this should be without duplication of grant scheme objectives that leads either to confusion as to where museums should apply, or to some museums with greater grant-writing capacity or savvy being more able to benefit. This answers the recent Museums Taskforce call for greater joining-up of public funds.³⁵

One of ACE's key functions in the museums sector is to be the development agency supporting Accredited museums to expand and improve their activities in areas including collections and audience engagement. A recent evaluation of the museum development organisations, mainly based in hub museums, found that while overall the programme is successful, it can be inconsistent between regions and in terms of what it delivers.³⁶ As ACE continues to integrate museums into the National Portfolio it will deliver this development function more consistently (Recommendation 16). ACE will also continue its support for museums' long-term planning and success, the Accreditation programme, and partnership working (Recommendations 17, 18, 19).

Some concern has been expressed about whether capital funding is being awarded with consideration of longer-term financial sustainability. The New Art Gallery Walsall is a current example of revenue funding not being aligned with the scale and ambition of the capital project, with well-publicised struggles to stay open. The Countries of Culture Select Committee Inquiry report notes that there has been a tendency to "fund large-scale... projects [that had] high running costs that local councils were unable to assist with in the current climate"; evidence to the inquiry found that this was a "particular concern" with HLF projects. However, it also recognised that it is clear that HLF is a project funder, and increasingly looks for business-driven models where commercial returns are available.³⁷

A report commissioned for the Review team by HLF found that 88% of museums in receipt of National Lottery grants considered that the funding had created new streams of income, enhanced existing ones or, in some cases, both. However, only 10% of recipients felt that the grant had brought significant improvements to the overall long-term sustainability of their museums, and a further 40% of respondents described the

³³ The Museums Association 'Museum Closure Map' is an interactive and ongoing map on the MA website.

³⁴ Egeria/Adrian Babbidge, December 2016.

³⁵ *Statement on Museums Funding*, Museums Association 'Museums Taskforce', 2017

³⁶ *Arts Council England: Museum Development Impact Evaluation*, ACE, 2016.

³⁷ *Countries of Culture: Funding and support for the arts outside London*, Culture, Media and Sport Committee, Fourth Report of Session 2016-17, House of Commons.

impact as 'minor' (although, sustainability may not have been an explicit goal of such projects, especially older grants).³⁸

Both ACE and HLF have offered Resilience Funds – flexible and relatively low-value grants that support museums in improving their sustainability, covering both infrastructure and capacity-building, including staff costs. The Review team recommends that National Lottery funding should be prioritised for projects that improve long-term financial sustainability (Recommendation 21), particularly outside of central London and in places of greatest need (Recommendation 24). This will entail a close understanding from both HLF and ACE on what works to create lasting impact, based on evaluation of previous funding awards.

DCMS, ACE and HLF will work together to develop an Action Plan for what it means for all three, plus other relevant public bodies, including the national museums, to work together more strategically. The objective would be to ensure the most effective use of public funding, setting out what this will mean for the museums sector as funded organisations, applicants, and potential applicants (Recommendation 2). This will include an approach to place-based decision-making, sharing knowledge, and taking a rounded view of what museums in a community and a region need.

The Fusiliers Museum

Diversifying income and increasing sustainability using an HLF grant

The Fusiliers Museum moved to the centre of Bury, opening on the ground and mezzanine floors of the new site in 2009. This initial phase of creating the museum's space cost £4.2m, including a £1m grant from HLF, but the funding did not stretch to a complete refurbishment of the building. Even so, it has welcomed 20,000 visitors every year since, a substantial increase on their previous location.

In 2014, the museum embarked on its Top Floor project, building an open store for their reserve collections and a corporate events space at a cost of £1.4m. The museum secured £840,000 from HLF, and with this commitment was able to fund the remainder from other sources, including £300,000 from its own reserves. Since then, the museum has increased visitor numbers by 31%, admissions income by 22%, and corporate events income by 200%. Based on current projections for growth in the event hire business, they hope to reduce the proportion of grant funding from 35% to less than 20%.

Increasing income from visitors and philanthropy

Museums are increasingly acting as cultural enterprises and seeking to increase their commercial income. The majority of museums responding to the 2015 Museums Association Cuts Survey were making efforts to generate more income (77%), but results are variable. National and ACE Major Partner Museums raise an average of 46% of their own income, independent museums around 70%,³⁹ and these figures are rising. In contrast, LA museums raise around 13% of their own revenue, and that proportion has changed little in the last decade.⁴⁰

³⁸ *HLF and the impact of our capital funding on the sustainability of museums*, DC Research, commissioned by HLF for the Museums Review, 2016.

³⁹ Figures provided by Adrian Babbidge for the Museums Review.

⁴⁰ *Ibid.*

Beamish Museum

Using an ambitious business plan to increase visitors, generate income and meet social objectives

In 2008, the museum's visitor numbers had declined from a peak of 500,000 in 1989/90 to 297,000. It was not able to meet increased running costs and faced an operational deficit of £500,000 in 2009/10.

The museum made key operational improvements, including the introduction of the value offer Beamish Unlimited ticket, giving 12 months' entry for the price of a day ticket. It is estimated that each pass sold generates one third of additional repeat visitors. It also increased the visitor offer, extended the season through investing in events and festivals, developed volunteering opportunities, and prioritised work with local communities.

By 2017, numbers had more than doubled to over 670,000, making it the most visited paid-for attraction in northeast England, and turnover reached around £11m. Beamish has created more than 200 jobs, doubled the staff, and works with around 450 volunteers providing more than 44,000 hours a year.

The flagship project in delivering on the first phase of their long-term development plan, *Remaking Beamish*, is an £18m scheme. It is anticipated that it will create 95 new jobs, attract an additional 100,000 visitors to the region, and generate surpluses of £600,000–£900,000 per annum.

Beamish has also recognised the important role of LA partners and reconnected with all 12 in the region. LAs have provided strategic support – for example, by advocating for investment in capital works, and through a regional stakeholder group in which the museum and LA work together on mutually beneficial agendas.

Museums are raising less from philanthropic support than other cultural sectors, such as the visual arts. Those outside London, and without the right networks and skills, find fundraising particularly challenging. There was a general consensus amongst philanthropic funders we consulted that they do not like to fill gaps left by the loss of public funding. They were also clear that they are unlikely to fund institutions considered financially unsustainable.

Some museums are also becoming more confident in asking for and receiving donations from visitors. Bristol Museum & Art Gallery tested a number of approaches and found that donations increased significantly (£1,441 in July 2015 and £10,694 in July 2016). They achieved this by changing the internal culture so as to introduce a number of different ways of asking individual visitors for donations, including a desk with staff trained to welcome guests. The National Audit Office recently found that the sponsored museums have a good understanding of issues such as due diligence and managing donor relations, but there is scope for them all to reach best-practice standards.⁴¹

⁴¹ *Due Diligence Processes for Potential Donations*, National Audit Office, 2017.

Private Giving to Museums: The Facts⁴²

- Private investment accounted for 18% of arts and cultural organisations' total income in 2014/15, a growth of 21% primarily driven by high-value individual donations to the largest recipients.
- London-based organisations account for 66% of total private investment, which is broadly in line with their share of total income (63%).
- 63% of survey respondents think that lack of in-house staff capacity and time will hold their organisation back in their private fundraising aspirations.
- But museums (including art galleries with permanent collections) are not benefiting as much as other sectors, attracting just 9% of private investment in culture, a total of £41m per annum, compared to visual arts organisations (including art galleries without permanent collections), which account for 23% of private investment. The report notes that museums tend to receive more public funding than other cultural sectors.
- Museums benefit the most from individual giving (£19m), followed by trusts and foundations (£15m), and business investment (£7m).

Local authority museums and trusts

Local authority museums face more challenges than other types in tackling common issues, especially as regards diversifying their income. Financial controls reduce the incentives to generate commercial income, low pay scales hamper recruitment, and controls placed on communications and marketing can limit museums' ability to engage audiences and innovate in their commercial activity.

LA museums report particular constraints on their digital activities. These include: the requirements for many to use in-house services rather than external experts; out-dated equipment and software; digital skills shortages that are related to an older workforce; and reliance on non-professional volunteers.

Additionally these museums often struggle to attract charitable giving due to their funding being perceived as the responsibility of the LA, or their ineligibility for particular funds. They generate 23% match funding for ACE grants compared to 58% by independent museums.⁴³ The HLF picture shows a similar trend.⁴⁴

Collectively, LAs spend a significant amount of money on museums, second only to DCMS. To make this funding as effective as possible, and especially to assist and incentivise museums to generate income to complement their public funding, LAs running museums should look carefully at several factors: how the museum operates; where funding is going, and its impact on agreed indicators; any restrictions, and where more freedom could be given; and how decisions are made regarding the museum.

There should be ongoing conversations between the museum and council to give as much certainty as possible and a shared understanding of what the council expects from the museum. At a minimum, this is likely to be the care of collections and buildings, but in return for relatively small amounts over these fixed costs, the museum

⁴² *The Private Investment in Culture Survey*, Arts Council England, 2016.

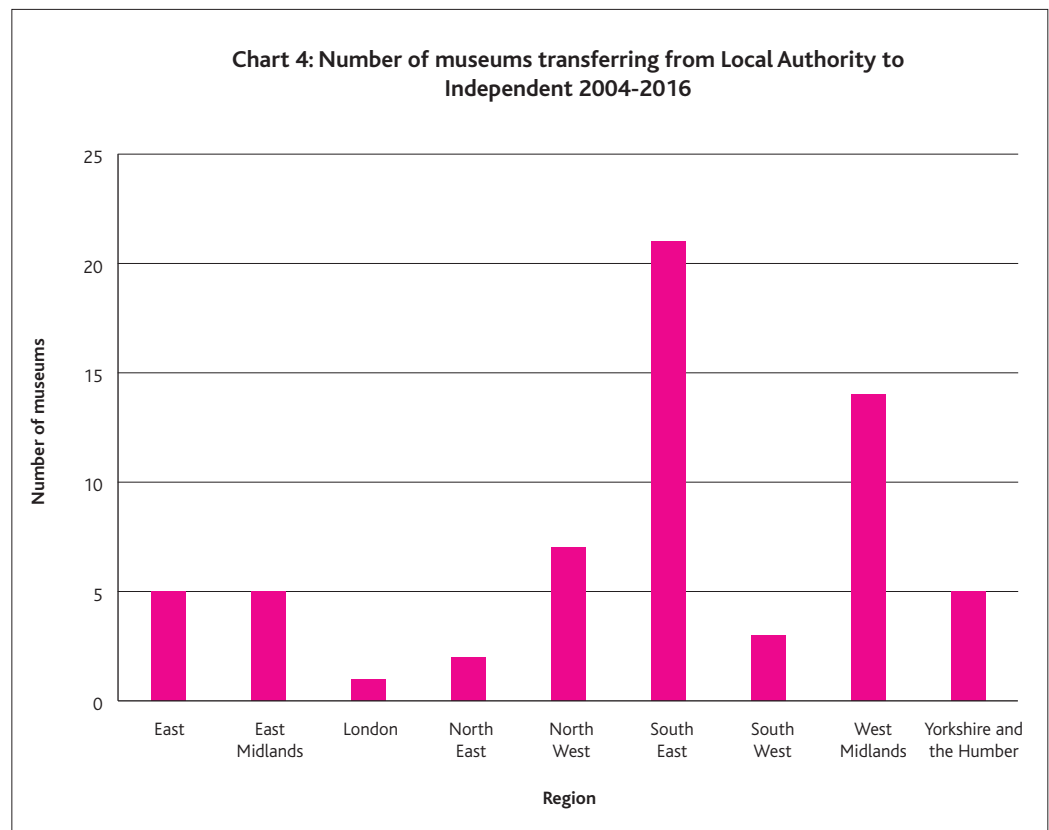
⁴³ *Research on the changing funding and operating models of Accredited Museums in England*, DC Research, commissioned by Arts Council England for the Museums Review, 2016.

⁴⁴ *Ibid.*

may also be able to commit to engagement work helping the council to deliver on other priorities. This could include, for instance, health, community cohesion, and regeneration (for more on these effects, see the Placemaking chapter below). The team has made a number of observations of actions LAs could take to help their museums thrive, based on the evidence seen in museums across the country, and DCMS should work with the Department for Communities and Local Government to explore whether the system of operational freedoms offered to national museums by DCMS can be mirrored for local authority museums (Recommendation 9).

One way to reduce barriers preventing greater enterprise is through the granting of trust status which awards museums greater financial and governance freedoms. There are now 64 LA museum trusts in England, and the ACE Accreditation data suggests the trend is accelerating (prior to 2004 there were only six). As the chart below shows, the greatest take up is in the southeast and West Midlands.

It is widely accepted that trust status is not in itself a solution to funding problems. Museums continue to require LA support or other new and realistic means of financing themselves. It was suggested, for example, that LAs could take advantage of community asset transfers and provide museums with the ability to generate their own income.



The team understands that trusts are likely to struggle if they do not have clear legal agreements with the relevant LA and are not freed up from the unnecessary bureaucracy of LA control. Such agreements should grant the museum the necessary rights (for example, with regard to the use of the building and the collection), as well as responsibilities (for example, provision to the local community and care of the collection, and generation of private funding).

The team also visited museums that report that they operate well as trusts, for example the Museum of Somerset, which has a clear set of agreements and support

from the council. This needs to be more widespread. ACE should work with the Local Government Association (LGA) on how to support LAs operating museums, including producing best-practice guidance for LAs supporting museums that are transitioning to independent status (Recommendation 13).

Other new models

The team has also seen good examples of museums utilising pooled resources, for example, with other museums, such as in Cornwall and Manchester. In the Humber, thanks to a partnership, museums overcame obstacles that included differences in structure, extra workload pressures, and staff concerns, through candid discussion between all parties. An early success was the 'Joining up the Humber' collaboration for the First World War Centenary.

We would encourage museums and LAs to consider how such a model might work for them in terms of sharing resources, for example, procurement, storage, and roles such as marketing, digital, curators, and senior leaders.

Another model is the Public Service Mutual – organisations that have spun out of the public sector. Whilst they deliver public services, they also have a high level of employee influence or control in the way they are run. This involvement can take many forms, for example, ownership of shares or representation on the Board. They can take a range of legal forms – often community interest companies – but some trusts may already fall within this definition. They operate in a range of sectors, including leisure, arts and cultural services, and there are several libraries thriving as mutuals. DCMS has published a toolkit on alternative delivery models⁴⁵ that, while specific to library services, has valuable insights the museum sector could draw on.

Business rates

The relevant parts of the tax system are considered complex and difficult to navigate. Museums have particular concerns about business rates, especially in the following areas: the methods used to determine rateable value of some museum buildings; how elements of museums operating as trading subsidiaries (such as cafes and shops) are valued; and possible changes to charitable rates relief, as LAs need to maximise rates returns. The Museums Association and Association of Independent Museums, in particular, have sought change in this area.

York Museums Trust

Court ruling on business rates

The rateable value for any non-domestic property represents the annual rent a property would achieve if let on the open market at a valuation date set in law. The Valuation Office Agency (VOA) is responsible for determining rateable values.

For some types of property, where there is limited or no rental evidence, an analysis of trade receipts and costs are used to decide how much an occupier might be willing to pay in rent (the Receipts and Expenditure [R&E] method). For others, the VOA uses the 'contractor's method' based on a percentage, set by government (the decapitalisation rate), of how much it would cost to purchase

⁴⁵ *Libraries: alternative delivery models toolkit*, DCMS, 2017. Available online.

the land and rebuild. Each museum is rated individually, on the facts pertaining to its own building, occupation, and circumstances.

Some trading spaces (such as shops or cafes) within museums have their own rateable value. Whether or not they are assessed separately depends on factors such as who occupies or controls the different parts of the museum, and how delineated the space is. The space can be considered ineligible for charitable rates relief even if the related income supports operations of the charitable museum.

In June 2017, York Museums Trust won a significant appeal case over the way its business rates are calculated and received a rebate of £100,000 for 10 years of backdated bills.

The Upper Tribunal ruled that the rates paid should be based on the R&E method rather than the 'contractor's method', reducing the rateable value of one of the sites to £1. It also ruled that the York Castle Museum shop and Yorkshire Museum and Gardens fell within the remit of the trust, and not just its commercial arm. These decisions reduce the trust's annual rateable value by £120,000 – a saving of around £10,000 annually.

The Museums Association reported⁴⁶ that the tribunal's decision could apply to 767 museums in England and Wales. The VOA has stated that future cases will be decided on the basis of their facts, and all methods of valuation can still be used to arrive at rateable values, depending on the design, function, and occupation of the museum.

Indemnity and insurance

When receiving loans of objects or works of art for temporary exhibitions, museums require indemnity or insurance. The Government Indemnity Scheme (GIS) enables museums to receive free indemnity cover for loans in and out, providing the security that should objects suffer damage or be lost/destroyed, the UK Government will reimburse the lender.

This scheme has been very successful, and is estimated to save museums at least £15m annually on insurance premiums. However, an increasing number of lenders, especially from European municipal museums particularly in Italy, Germany, and Switzerland, are declining to accept GIS. This can be because of a blanket policy, inclusive arrangements with lenders' own transport and insurance companies, or in a small number of cases because GIS terms and conditions cannot be met. Where this occurs, museums, including the national museums, need to ensure that staff understand the requirements and more quickly seek out commercial insurance and the exemption to take it out.

ACE and DCMS will continue to work closely together to address these concerns, to promote GIS internationally, and to clarify and simplify the process for applying for commercial insurance (Recommendation 6).

⁴⁶ *York Museums Trust wins landmark business rates case*, Museums Journal online, 6 June 2017.

II. Growing and diversifying audiences

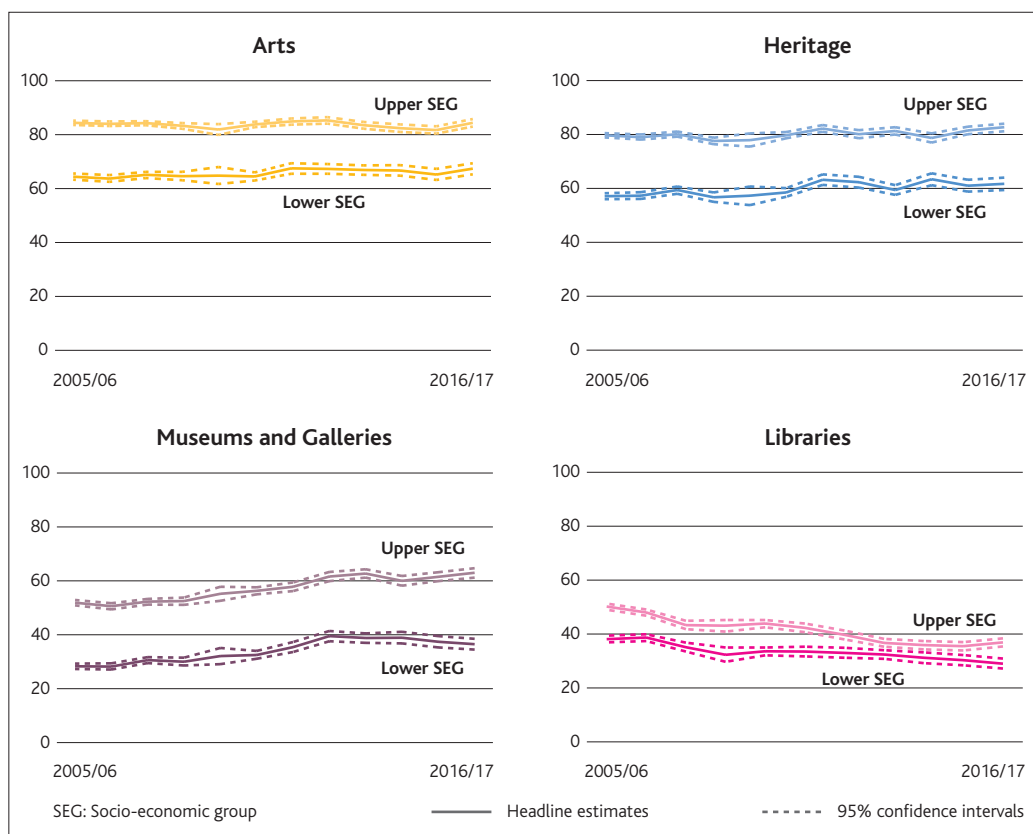
Museums' founding purposes often relate to their public and educational functions. They exist to engage audiences with their subject matter and often hold a collection closely associated with a particular place – in some sense, therefore, belonging to the people living there. Museums play an important community role, bringing people together for learning, enjoyment and inspiration, and providing a space for civic activities and reflection.

Audiences have grown significantly over the past decade, but the issue of unequal participation across socio-economic groups persists. Growing and diversifying audiences means museums can maximise their public benefit, attract support, and generate greater income from visitor admissions, or commercial elements such as cafes and shops.

Increased participation can also have benefits for the individuals and populations involved: there is a growing body of evidence demonstrating the range of benefits museums offer, including to people's health, education, and wellbeing. It is the responsibility of museums to understand their audiences (and non-audiences) and their reasons for visiting, and to investigate how they can diversify, based on local demographics and needs. This should be a top priority for the sector, with a particular emphasis where organisations enjoy public funding.

Who goes to museums

Since 2012/13, just over half of adults go to a museum every year, increasing from 42% in 2005/06 to 52% in 2016/17. However, this audience is not as diverse as it could be.⁴⁷ Evidence shows that 63% of people from higher socio-economic groups visited, compared with only 36% from lower groups. Across the arts and cultural sector, the difference is smallest for libraries and greatest for museums and galleries, as demonstrated in the charts below.



⁴⁷ The *Taking Part* survey commissioned by DCMS, Arts Council England, Historic England and Sport England measures engagement by: age, sex, socioeconomic group, employment status, housing tenure, ethnicity, religion, and whether the respondent has a long-standing illness or disability.

We also know that museums are less likely to attract much younger and much older audiences. In 2016/17, engagement rates for people aged 25–74 were around 55%, compared to 47% for people aged 16–24, and 35% for those over 75. They are also more likely to be visited by people from the White ethnic group: in 2016/17, 54% of white people visited a museum or gallery, and 44% of people identifying as Black, Asian and Minority Ethnic (BAME).⁴⁸

Leeds City Museum

Using a collection to attract new audiences

In April 2014, the museum opened a new gallery, Voices of Asia. Leeds Museums and Galleries had an existing collection of over 6,000 Asian items as a result of people from Leeds travelling and working in Asia from the late 18th century onwards.

The museum set up a semi-formal network, bringing together academics and representatives from different Asian communities, businesses and voluntary organisations to provide advice, insight and context to the plans for the gallery. The network helped identify objects in the collection, as well as suggesting community artists and performers who contributed to four films and a supporting cultural programme.

Visitor data

Data is key to understanding and tracking audience diversity, but the museum sector is inconsistent in its collection, definitions, and use of it. Furthermore, the data that does exist is not collated and presented as an accessible set. It is vital that it should be used to best effect. The aggregate visitor data for Accredited museums should also be collected and shared by ACE, alongside a range of other data that helps to explore the sector's health, such as income and expenditure data and workforce, for benchmarking and policymaking (Recommendation 15).

Barriers to participation

The impact of entry charges on participation has been much discussed. The commitment to free entry to the permanent collections at DCMS-sponsored museums came in 2001; some of the nationals had offered free entry before this, but it now applied to all the sponsored museums. This has had a dramatic effect on the total number of visitors, which rose by 51% in the first 10 years of the policy,⁴⁹ and have continued to increase. Recent research commissioned by the Association of Independent Museums (AIM), based on non-national museums, found no direct link between the diversity of the audiences and whether the museum charges for admission.⁵⁰

The annual *Taking Part* survey asks people why they might not attend museums. Some people report that they are not interested, or they do not have the time – if museums are considered to be a leisure attraction and within the experience economy (for many, they are), then they are in a crowded marketplace. Others do not perceive museums to be 'for them'. A great deal of work has been done in individual museums

⁴⁸ *Taking Part*, DCMS, 2017. The number of respondents from BME populations is low and so there is a range of +/-4%.

⁴⁹ *10th anniversary of free admission to national museums*, NMDC website

⁵⁰ *Taking Charge – Evaluating the Evidence: The Impact of Charging or Not for Admissions on Museums*, Association of Independent Museums, 2016.

to try to overcome such barriers. This includes: family-friendly galleries; programmes using collections and telling stories designed to attract different audiences; and using communications channels, including social media, to reach potential visitors.

The Review team is aware of the ongoing Diversifying Museum Visitors project led by AIM and ACE. We hope that this will provide further useful analysis of what is and is not working, and subsequent guidance on helping museums to welcome people who might like to visit, but currently do not.

Geography of provision

The interaction of provision, demographics, and museum participation is complex and not well understood. The East Midlands is a 'cold spot', with fewer museums in absolute terms; it is also the region that experienced the greatest reduction in LA funding between 2010 and 2015: 24%. While regional figures on audience participation fluctuate, the Midlands, Yorkshire and the Humber, and the northeast tend to have below proportions of adults visiting museums.⁵¹

Mapping by Nesta⁵² has the northeast as another cold spot (looking at absolute numbers), while the southeast has the most museums. London has the third-lowest number of museums of all the regions, although the highest density (museums per sq km); London boroughs Westminster and Camden are in the top three LAs in England for absolute numbers of museums (Cornwall, with 31, has the most). Large urban centres have a greater proportion of their surrounding populations living in more deprived areas, who, as discussed above, are less likely to visit museums. This means lack of proximity is not necessarily a barrier, and raises a question for those museums, including DCMS-sponsored museums in London, of how to attract their closest neighbours.

The Review team recommends that DCMS and its ALBs should seek better to understand sector activity and where public funding for museums as a whole is directed; they should then use this intelligence to fund strategically across the country. Examples of strategic funding might include targeting funding to 'cold spots' (areas of lower cultural participation and areas of lower provision of activities and infrastructure), and in particular, funding new museums only where there is a demonstrable need (Recommendations 3, 23, and 24).

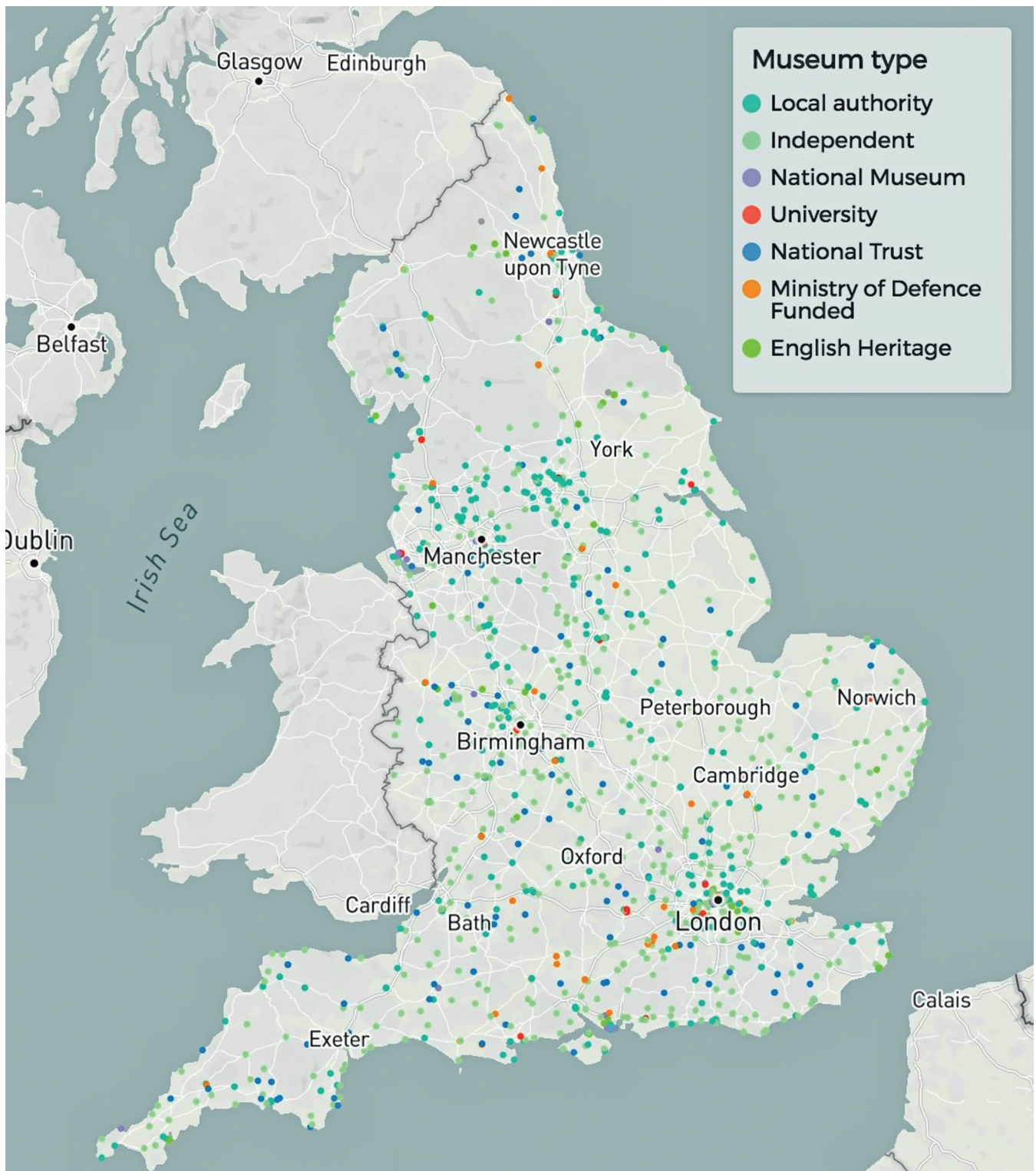
Deeper engagement and impact

Museums are increasingly focused on quality of visitor experience and the impact they have on people's lives. Common measurements of visitor satisfaction are: looking at dwell time, where time is spent, and asking visitors whether they would recommend the museum to a friend.

Other museums are using service design principles to explore how visitors interact with their galleries and objects, and to adapt their offer accordingly. Examples include the Natural History Museum and The National Gallery using mobile phone signals to understand how people move around the space; the Barnes Foundation in the US observing visitors using their audio guides and experimenting with wearable technology to encourage people to extend their visits; or the Battersea Arts Centre's Creative Museums project piloting their 'scratch' method of iterative programmes and partnerships development.

⁵¹ *Taking Part*, DCMS, 2017.

⁵² *The Museums map: mapping access to England's museums*, Nesta, 2017 (interactive available at <https://nesta.uk.github.io/museumsmap/>)

The Interactive Museums Map, Nesta⁵³

Some museums go further, using 'co-production' as a method to involve audiences in creating content or programmes. For example, school groups have helped to create displays at the Manchester Museum using their own interpretations of the local history objects, while the museum's new South Asia Gallery is being developed in close collaboration with diaspora communities across the city. The Paul Hamlyn Foundation's project, Our Museum, has invested over £1.3m in its work with nine museums, placing communities at the core of the organisational processes and decision-making structures.

⁵³ Ibid. Map graphic provided and reproduced by the kind permission of Nesta.

Increasingly, museums are offering a range of arts within their spaces, enriching how people experience the museum with complementary interactive and immersive performances, activities and talks. As well as re-interpreting and re-imagining collections for new audiences these may also provide a source of income, such as the successful 'lates' programmes at many museums.

III. Dynamic collection curation and management

Collections are the focus and purpose of museums. They are what make them unique and form the basis of their research and public engagement. Museums use their collections to tell local, national and global stories past and present, as well as preserving them for future generations. It has been estimated that there are around 200 million objects in collections across England and Wales,⁵⁴ but there is little macro data available beneath that. There are collections of national significance throughout the country: 74 non-national museums hold Designated collections (those assessed to be of special national importance under a scheme run by ACE), spread across every region.

There are also important museums buildings, in many cases purpose-built to house national and civic collections, and integral to how that collection is managed and experienced. Listed buildings housing museums also require curatorial expertise and care.

The Review team heard from a number of museums that they are struggling to make best use of their collections due to inadequate storage and expertise. Many collections are too static, with inadequate development.

Many of these issues must be addressed by museums themselves, working in partnership with one another and sector bodies. But there are also issues for the government and funders to consider, including ensuring access to the right support for collections management and storage; coordinating the involvement of the national museums right across the country; and developing a framework for identifying and responding to collections at risk.

Collections expertise

Effective collections management (and making best use of collections for public engagement and research) requires expertise. Even the larger museums do not have dedicated experts for all parts of their collections; often there is just one curator covering the entire collection, with additional responsibilities besides. In Cornwall, there is the full-time equivalent of five professional curators working in more than 70 museums. Some types of collections, for example, natural history collections, are less likely than others to have relevant curatorial expertise. There are some excellent examples of museums working together to pool expertise, both at a local level and nationally, with good work being supported through Subject Specialist Networks. The Art Fund New Collecting Awards support curators' professional development while at the same time funding acquisitions for their museums.

Such expertise must be harnessed to best effect and will be one focus of a new framework for partnership working between national and non-national museums (Recommendation 12, see p48).

⁵⁴ *Collections for People*, UCL Institute of Archaeology, 2008.

Collections management: collecting & disposals or transfers

Museums need robust management policies to govern their individual approach to acquisitions, care and preservation, and disposals – all of which are equally important to ensure that collections are relevant and useful. Collections care is resource intensive, and there is potential for greater sharing of skills and spaces – between nationals and non-nationals, those with similar types of collections, and geographically – to enable better care.

Many collections continue to grow. Museums should collect, actively and appropriately, in order to keep their collections active and relevant, to tell new stories about the past, and to document our own age. The two rounds of HLF's Collecting Cultures project helped a number of museums to develop their collections, through targeted strategic acquisitions, developing curatorial skills and audience engagement with collections ranging from fashion to football. Several projects focused on improving the representation of diverse histories in collections, including black artists and photographers, and radical political movements.

At the other end of the collections cycle is disposal or transfer. Many museums would like to rationalise their collections in an ethical way to improve collections management; make best use of the most important and interesting objects; and reduce pressure on storage. Guidance does exist on making appropriate disposals: the Museum Association's Code of Ethics sets out strict guidelines⁵⁵ and the process is governed by ACE's Disposals Toolkit. Disposal or transfer is often prevented by lack of resources, acceptable process in the individual museum, or confidence: museums reported they would like explicit 'permission' to make disposals. The Review team suggests that museums should have an active programme of assessing and, where appropriate, rationalising their collections.

There are currently some unhelpful limitations on museums' abilities to manage collections. Museums are prohibited from displaying or disposing of objects with uncertain ownership, for example, orphan works, deposited objects and uncollected loans. If a suitable legislative opportunity arises, it may be useful to explore how museums might acquire legal ownership of these objects where no owner can be traced after an appropriate length of time.

Museum of London

Review and rationalisation of collections

The museum recently completed a major review and rationalisation of its social and working history collections, to create a refined collection that was better managed, stored and documented, and more physically and intellectually accessible. Another project objective was to experiment with seeking non-traditional recipients for disposal.

By the project's completion in March 2017, just over 5,000 surplus and duplicate objects had been disposed of; 3,339 of these went to more than 80 recipients including both large and small Accredited and non-Accredited museums, charities and universities. The project also resulted in new procedures around large-scale rationalisation and disposal, including a new way for the museum to assess the significance of objects.

⁵⁵ Disposal means removing an item from a museum's collection, often passing it to the collection of another museum.

The transfer of items to a broad range of organisations including schools and colleges, global charities and a new generation of skilled craftspeople, has facilitated new forms of community engagement and ensured that, where possible, new homes were found for disposed items, enabling them to continue to offer public benefit in a new context.

Collections storage

Storage has been a low priority for funders, which tend to concentrate on areas open to visitors. However, basic building infrastructure or storage projects that protect the collection can be just as important to the visitor experience. Storage has suffered underinvestment and lack of maintenance, leaving inadequate facilities with little public access, insufficient space, or poor environmental quality. This has placed valuable collections at risk, or, in a few cases, already resulted in damage.

There is no one-size-fits-all model for collection reserves. In any one museum these can be used for many different purposes, from academic research and conservation to display preparation. Most museums cannot afford to create new stores, especially if the savings created will be returned over the long term. Museums also report that it is difficult to access National Lottery funding (which would unlock other capital funding) for storage projects. The *Strategic Review* identifies that recognising and articulating the purposes of stored objects can help find solutions.

There have been a number of innovative storage projects. Open stores like Kelvin Hall in Glasgow, and overseas museums such as the new Broad Museum in Los Angeles, offer public access as well as storage. Partnership stores such as the Somerset Heritage Centre, which houses collections from museums across Somerset and North Devon, can provide economies of scale. For example, the Polar Museum and Whipple Museum of the History of Science, University of Cambridge museums, are collaborating to store radioactive objects, and there is more potential for museums and universities to collaborate, particularly over objects that have a high research value but are less likely to be used for public display.

There is more scope for such joint projects, for instance storage that is based regionally; storage that is owned by an individual museum offering space and selling other services such as conservation; or storage by type such as the British Library whose Boston Spa facility offers top-class space for print materials.

The DCMS/Wolfson Museums & Galleries Improvement Fund has given out £44m since 2001 to projects improving the quality of displays, spaces and access (including disabled access). To contribute further, the Review team has asked National Lottery funders to fund 'back of house' projects such as storage, which are as essential to the smooth running of the museum and use of the collection as public galleries (Recommendation 20). It has also asked them to actively encourage partnerships through the funding of joint projects, including, but not limited to, shared infrastructure (Recommendation 25). DCMS will work with the University Museums Group to include their museums in the partnership framework, exploring the potential for collaboration on storage and other issues (Recommendation 7).

Blythe House

Protecting and increasing access to the national collection for generations to come

Three national museums – the British Museum, Science Museum Group (SMG), and the V&A – store more than two million items in Blythe House, a Grade II listed building in central London, and the former headquarters of the Post Office Savings Bank.

Blythe House was never designed to store museum objects, and requires significant investment in maintenance and repair. In 2015, the government announced a major £150m grant programme to move the objects into modern and more appropriate facilities by 2023, after which the building will be sold.

The museums are working with universities, other arts and cultural institutions, and local councils to secure new sites that will better care for their unique collections for generations to come, and make them more accessible to the public and specialists, both physically and online. For example, SMG plans to develop and expand its existing storage site at Wroughton near Swindon, which covers more than 500 acres, and hopes to see it become a national resource for storage space and expertise.

Shortage of storage is becoming a particular issue for museums located near significant construction schemes, particularly national infrastructure projects such as transport links (e.g. HS2). Finds from archaeological excavations are deposited in the nearest museum, which often do not receive adequate – or sometimes any – additional resources to manage or store such items. The Review team has asked HE to make recommendations to DCMS to resolve this issue (Recommendation 27).

Working in partnership on collections

There are good examples of partnership galleries (the British Museum provides objects and expertise to more than 20 galleries around the UK); long-term loans (the V&A alone has around 1,700 objects on long-term loan across the country); and spotlight loans programmes (e.g. the Horniman Museum's *Object in Focus* loans programme) that increase access to both national and non-national collections.

ACE funds local Museum Development programmes that support museums holding or working towards Accreditation. These networks can provide the basis for sharing collections and expertise at a regional level. 'Knowledge Transfer Partnerships' are another model: for example, the Trusted Source, a partnership set up by the National Trust and the University of Oxford, provides an online knowledge bank about National Trust sites and collections.

There are a number of relatively recently developed funding programmes to support sharing collections (and, to some extent, expertise). Since 2015, the ACE *Ready to Borrow* scheme has invested £3.6m to help museums upgrade their exhibition spaces, in order to look after important objects. The Garfield Weston Foundation and Art Fund have recently launched a £750,000 funding and training programme to support the wider sharing of national collections with museums across the whole of the UK.

Two Temple Place

Bringing together public collections

The Bulldog Trust, which has its headquarters at Two Temple Place, London, has established a Winter Exhibition Programme that for the last five years has given space to public collections from around the UK and opened an impressive building to the public. The Winter Exhibition Programme also allows the Courtauld Institute to offer emerging curatorial talents the opportunity to create a major exhibition.

With ACE investment of more than £400,000, exhibitions are hosted in partnership with a single museum or a group of public museums, galleries or collections, each of which identifies challenges they find themselves facing. Some of the issues previously raised include: lack of engagement from local authorities; lack of resources to undertake research, development or necessary collection care; and difficulty in attracting new audiences to the collections.

Success stories that cite their involvement in the Winter Exhibition Programme as a key factor to future success include a £1m local authority investment to redevelop the William Morris Gallery, which was significantly influenced by the *William Morris: Story, Memory, Myth* exhibition (2012), and Blackburn Museum securing funding from the Borough Council for a full-time curator and major investment in modernisation works, following the 2015 *Cotton to Gold* exhibition.

These funding programmes will improve partnership working between nationals and non-nationals. Expertise and collections are spread right across the country but they tend to be better resourced in the national and university museums. These institutions already do a lot of excellent partnership work, but a more joined-up and strategic approach could be more responsive to need and make better use of limited resources. The Review team is therefore recommending that a new partnership framework be developed, led by DCMS, working with ACE and the national and university museums (Recommendation 12). For more information on the partnership framework, see the Strategic Review.

University of Nottingham Museum (UNM)

Using the Ready to Borrow fund to borrow and display objects from the national collection

UNM wanted to be able to host loans from national museums and ACE Major Partner Museums. In 2016, it used the *Ready to Borrow* fund to purchase display cases that meet Government Indemnity standards and to develop ambitious new exhibition projects with partners.

UNM used the cases to build a display relating to objects found at the site of the Ancient Egyptian city of Naukratis; it centred on a British Museum spotlight loan, a statue dating from the 6th century BC. The display also drew on Naukratis collections loaned from Nottingham City Museums and Galleries, including a Roman mummy portrait never previously exhibited. UNM also collaborated with the Ashmolean for the first time to borrow further objects from Naukratis. It is now exploring new loan and collaboration possibilities with the British Museum, York Museums Trust, and the Science Museum.

IV. Contributing to placemaking and local priorities

Museums can play a major role in their communities, both responsively and helping to shape place. Polly Hamilton, writing in the foreword to the Local Government Association's 2017 report on the role of culture in placemaking, defines it as what "draws on the combined assets of heritage, people, buildings and landscape to create places for people to fall in love with... giving people the opportunity to connect their individual stories with collective narratives, helping to make their place feel like home".⁵⁶

Museum collections often tell this story of a place and its people – what makes it distinctive, as well as its connections to the world beyond. From the Axminster Heritage Centre, which charts the history of the local carpet industry, to the People's Republic Gallery in the Museum of Liverpool, which engages visitors with what it means to be Liverpudlian, to the Museum of Making that reinterprets and updates the industrial heritage of Derby Silk Mill, museums are uniquely placed to use objects and their stories to connect *people to place*.

Corp and Regimental museums are another instance of museums contributing to local placemaking, and there are well over 100 of these, the majority of them run as independent trusts, and many of them in receipt of MOD and ACE funding. Found throughout all four nations, these military museums dedicated to single regiments and corps hold collections of significant local importance. Amongst them are museums dedicated to centuries-old regiments that hold invaluable local archival materials. They also serve to bolster local pride through displays of historic uniforms and medals awarded to soldiers with local backgrounds, as well as contributing to the area's heritage.

Early findings from the ongoing Calouste Gulbenkian Foundation inquiry into the civic role of the arts describes the different metaphorical places that arts and cultural organisations, including museums, can become in the lives of local communities: colleges (places of learning), town halls (places of debate), parks (public spaces open to everyone), temples (places that give meaning and provide solace) and homes (places of safety and belonging).⁵⁷ This involves strong leadership that puts people and communities at the centre of art and cultural practice, moving beyond participation to a user-generated museum that is as much about the museum going out into the community as people being encouraged into the museum.

Drawing people in

Both PriceWaterhouseCoopers' *Global Cities 2015* and AT Kearney's annual *Global Cities Report* consider museums when measuring a city's cultural attractiveness. This recognises the competitive edge that cultural investment, including museums, gives to cities in attracting and retaining talent. For example, we heard how Exeter City Council has made great use of the Royal Albert Memorial Museum in developing its knowledge economy.

DCMS research suggests that investment in culture, sport and heritage can contribute to positive economic and social outcomes at a local level, making places more attractive to businesses and residents, although more work is needed to understand the relationships and causality. The role that culture plays in local places should be thought of as an 'ecosystem', where cultural investment is likely to have an impact on local

⁵⁶ *People, culture and place*, Local Government Association and The Chief Cultural & Leisure Officers Association, 2017.

⁵⁷ *Rethinking Relationships: Inquiry into the civic role of arts organisations Phase 1 report*, Calouste Gulbenkian Foundation UK Branch, 2017.

areas through clustering effects offering benefits of shared infrastructure, knowledge spillovers and innovation, driving a cycle of more jobs and further enterprise. Businesses often choose to invest in places (non-urban as well as cities) with a strong cultural and heritage offer, especially creative firms, high-tech organisations, and smaller independent businesses. Positive effects are likely to embed over time with the impact of fixed cultural institutions and sustained programmes.

Touchstones, Rochdale

Improving the cultural offer to draw in businesses

Operated by a Cultural Trust, Touchstones Rochdale houses Rochdale's Museum, Art Gallery and Local Studies centre. The team at Touchstones has positive working relationships with organisations including Rochdale Borough Council, Rochdale Development Agency, and Town Centre Management.

The council recognises that a vibrant cultural and heritage offer is a distinctive attraction for new businesses looking to relocate to the town, with businesses feeding back that it contributes to the holistic offer for workers living in the area. This is one of the key strands of Touchstones' involvement in the emerging Business Improvement District and Place Board (under the #thisisRochdale brand). Working in partnership with the council to understand the need for a cultural offer, the museum has created a programme of events and activities in the evenings and weekends that contributes to the vibrant night-time economy, supporting the significant number of newly opened bars and restaurants, as well as providing family-friendly day and weekend events and entertainment. Similarly, recent collaborations with Town Centre Management have seen empty shops transformed into temporary exhibition spaces or artist studios, linking shoppers with heritage.

Touchstones also has a central role in the Council's Heritage Action Zone which aims to promote Rochdale's broad heritage offer, including the Rochdale Pioneers Museum, Greater Manchester Fire Service Museum, and Town Hall. The heritage sector is playing an important role in Rochdale's regeneration.

Museums also drive tourism. Museums are the most popular destinations for domestic holidaymakers within Great Britain and 48% of international holidaymakers visit a museum.⁵⁸ The Review recommends that the DCMS Museums and Tourism teams should work together to include museums in future Tourism Action Plans (Recommendation 5).

Many museums are actively supporting local growth agendas by helping to draw in both permanent residents and visitors. This means building relationships with decision-makers in local authorities and other bodies, such as Business Improvement Districts and Local Enterprise Partnerships (LEPs). Some areas or individual museum services have experienced sharper declines in public funding (for example, in Lancashire and Leicestershire); those that have fared better have often been where there is strong political support for culture and a keenness to utilise the economic and social benefits it brings (for example, Bristol and Exeter).

⁵⁸ *Museums and Tourism*, NMDC website

Within the suggestions for LAs, the Review team has said LAs should include museums within their placemaking strategies, consider creating cultural strategies setting out how museums contribute to their priorities, and support museums participating in LEPs.

Cornwall Museums Partnership (CMP)

Engaging with a Local Enterprise Partnership

In 2012, an informal partnership of larger museums in Cornwall came together to deliver the aims of a new Museum Strategy. Within two years, the partnership – now 70-strong – was seen as a flagship partnership project for rural areas throughout the UK.

Engagement with the LEP by CMP has resulted in a higher profile for museums, better connections between museums and the business community, and the inclusion of museums, as part of the creative industries, within future economic plans. CMP has led the development of a new focus on the creative industries and their role in supporting economic growth in Cornwall. This has resulted in a new emphasis on creativity and culture in the region's Strategic Economic Plan, and an enhanced recognition amongst senior decision-makers of the creative and cultural sectors and the economic and social impacts they deliver.

Whilst this is a long-term process, it is clear that by engaging with the LEP, museums are now better positioned to both understand and respond to Cornwall and the Isles of Scilly's economic challenges and opportunities.

Living well

Museums contribute to a range of social priorities, including health, education, community engagement, and social inclusion.⁵⁹ Analysis commissioned by the Happy Museums Project suggested that increased happiness and self-reported health can be attributed to visiting museums, with people who visit museums valuing that participation at about £3,200 per year (i.e. they would pay that amount for access to museums).⁶⁰

While data in some areas is limited, the recent extensive inquiry by the All-Party Parliamentary Group (APPG) on Arts, Health and Wellbeing⁶¹ found evidence that cultural engagement reduces stress and helps people to live longer and happier lives. It cites that more than 600 museums run programmes trying to improve health and wellbeing. They offer spaces for non-clinical self-exploration, including public health education, and for supporting people with dementia and mental health problems. It found a particular need to widen accessibility for museums, which might involve museums going out to potential participants, so the benefits can be felt by people who are older, isolated, vulnerable, or living on low incomes. The APPG report suggested that the MA's Code of Ethics for Museums could set out the health and wellbeing benefits of the arts.

Some museums support the LA's health and education work in a more structured way. The Review team's research suggested that health services and cultural services are often trying to reach the same disadvantaged populations and could co-operate

⁵⁹ See for example: *Enriching Britain: Culture, Creativity and Growth*, The Warwick Commission on the Future of Cultural Value, 2015; *Museums Change Lives: The MA's Vision for the Impact of Museums*, Museums Association, 2013; *The Economic Impact of Museums in England*, ACE, 2015.

⁶⁰ *Museums and Happiness: The value of participating in museums and the arts*, Daniel Fujiwara, 2013.

⁶¹ *Creative Health: The arts for health and wellbeing*, APPG on Arts, Health and Wellbeing, 2017.

more to do this. In Leicestershire, the museums team is based within the Communities and Wellbeing department of the County Council and runs programmes for dementia patients using collections. In Great Yarmouth, museums support children's literacy, a particular problem in that area.

Manchester Museums and Galleries

Health and Culture programme

Manchester Museums and Galleries Partnership's *Health and Culture* programme, established in 2008, focuses on delivering projects and programmes in collaboration with the Central Manchester University Hospitals NHS Foundation Trust and the Manchester Mental Health and Social Care Trust.

Once a year, the *Health and Culture* team run *+Culture Shots*, a week-long takeover of Central Manchester University Hospitals in which museums from across the city run workshops, activities and events for NHS staff and their visitors, to explore how culture can enhance the health and wellbeing of both staff and patients, as well as professional practice. More than 2,000 NHS staff participated in *+Culture Shots* in 2016. In 2012, *Health and Culture* received two awards from the Royal Society of Public Health for innovative and outstanding contributions to arts and health practice and research.

In 2013, the Manchester Museum and Imperial War Museum North launched *Inspiring Futures: Volunteering for Wellbeing*. This socially-engaged volunteering programme, supported by HLF, was the first wellbeing project of its kind to work in partnership with multiple heritage and referral organisations to develop community-based volunteering. Evaluation found that for every £1 invested, £3.50 of social and economic value was delivered, including 30% of participants moving into employment or further education and around 60% reporting sustained increase in their wellbeing.⁶²

Measuring economic and social impact

Wherever possible museums should measure and report on their contribution to local agendas, both economic and social, to support their case for investment and to improve the sector's understanding of what works. There are reports on methods and findings by ACE,⁶³ the National Museums Directors' Council (NMDC),⁶⁴ the Association of Independent Museums (AIM)⁶⁵ (including a toolkit), and the Arts and Humanities Research Council.⁶⁶

A number of museums and galleries have commissioned their own studies that have produced positive results.

Although a contemporary art gallery, the study undertaken by Turner Contemporary with Canterbury Christ Church University,⁶⁷ is a relevant example of using Social Return on Investment principles (how much social value is delivered for the public investment

⁶² *Inspiring Futures: Volunteering for Wellbeing Final Report 2013-16*, Volunteering for wellbeing, 2017.

⁶³ *The Economic Impact of Museums in England*, ACE, 2015.

⁶⁴ *Valuing Museums*, NMDC, 2004.

⁶⁵ *The Economic Value of the Independent Museums Sector*, AIM, 2010.

⁶⁶ *Measuring Economic Value in Cultural Institutions*, Arts and Humanities Research Council, 2015.

⁶⁷ *Turner Contemporary: Art Inspiring Change Social Value Report*, 2016.

made). It found that 48% of visitors came to Margate especially to visit the gallery, equating to 960,000 visits to the town and Net Additional visitor-related expenditure of £7.8m supporting 101 full-time equivalent jobs across Kent.

The Watts Gallery Artists' Village in Surrey – opened in 1904 as the first purpose-built gallery dedicated to the work of a single artist, G.F. Watts – calculated⁶⁸ that in 2015 its Gross Value Added was £1.29m, supporting 124 jobs in the local economy and contributing £2.62m of additional gross turnover to nearby businesses. This followed an £11m renovation, completed in 2014, which restored the Tea Shop, created a shop featuring local products, and improved visitor facilities (including signage on the nearby A3). Visitor numbers increased from 12,000 in 2001 to 35,000 in 2015.

National Museums Liverpool (NML) has a consistent methodology and publishes economic and social impact figures annually. In 2015/16 there were 2.8m visits to NML,⁶⁹ including 400,000 international visitors (out of 600,000 international tourists to the Liverpool City Region). NML contributed £53m to the local economy, directly supporting 470 jobs; it estimated this extended to £25m GVA and 550 jobs in Liverpool City Region, and £30m GVA and 670 jobs in the north west. External evaluation of the *House of Memories* programme for dementia sufferers estimated £12.6m social value was created in the year following the programme of training for 11,000 health, housing and social care workers.

This demonstrates several options for museums wishing to measure value and impact, albeit often challenging and expensive ones. However, a preferred method has yet to emerge. Reports use differing methodologies and look at different kinds of successes, producing results that are not comparable across museums and that in some cases are not considered statistically credible or robust. These factors create difficulties for funders, including ACE/HLF, foundations, and LAs trying to decide where to invest. It would be beneficial for the sector to develop agreed standards in order to direct these efforts more usefully.

The Culture and Sport Evidence programme (CASE) is a partnership between DCMS, ACE, HE and Sport England. It is currently looking at techniques using wellbeing methods to produce data on the impact of cultural institutions that is considered strong enough to use in HM Treasury business cases. The Review team recommends that DCMS and ACE consider how to extend this methodology into a framework or tool that could be used by any museum (Recommendation 8).

Place-based funding

The Great Place Scheme, a key Culture White Paper commitment, is a pilot scheme funded and delivered through ACE and HLF. It has two central aims: to ensure that the considerable investment in culture made by organisations like HLF and ACE has the maximum positive impact on jobs, economic performance, educational attainment, community cohesion and health and wellbeing; and to persuade civic organisations and local businesses to invest in and put culture at the heart of their thinking. Sixteen places across England have been awarded funding, totalling £20m across three years.

The UK City of Culture, building on the success of Liverpool in 2008 as European Capital of Culture, also shows what can be achieved when a place makes culture a key component of its growth plans. The programme in Hull this year has helped to

⁶⁸ *The Economic Impact of Watts Gallery – Artist's Village Final Report*, University of Surrey and The Hazelhurst Trust, 2016.

⁶⁹ *Making a Difference: the economic and social impact of National Museums Liverpool*, NML, 2017

unlock significant business investment and in its first three months nine out of ten people living in Hull had taken part in cultural activity.⁷⁰ As anchor institutions whose collections and buildings have a strong connection to local people, museums are well placed to play a key part in such initiatives, exemplified by the lead role Tyne & Wear Archives and Museums has taken in the Great Exhibition of the North being held in Newcastle-Gateshead in 2018.

Great Place Scheme, Barnsley and Rotherham Councils Museums at the heart of a Great Place project

In 2013, Barnsley Council opened Experience Barnsley and Discovery Centre, a new museum developed by and for the people of Barnsley, based in the 1930s Town Hall. The project was unusual in that it was the culmination of a huge public engagement exercise in which local people created the entire collection through donations.

The unique ability of culture and heritage to excite and interest people from all walks of life underpinned 'Seamless', Barnsley and Rotherham's Councils' successful joint application for the Great Place Scheme.

The project will reach out to communities across Barnsley and Rotherham that were hit hard by the decline of traditional industries and aims to transform the Councils' engagement with children and young people. The project aims to build cultural capacity, embed a sense of place, and use culture as an engine for social improvement and economic growth. Barnsley Council received £1,264,000 from ACE and HLF towards *Seamless* as part of the Great Place Scheme, with Barnsley and Rotherham Councils each investing an additional £79,500 in the project.

Barnsley Museums operates five sites that receive around 1.2 million visitors per year. This Review was told that Barnsley Metropolitan Borough Council has increased its funding to the museums service over recent years, with the Culture and Visitor Economy Service receiving an additional £100,000 revenue budget in 2016/17. The council has also taken steps to reduce barriers and bureaucracy, allowing the museums to become more commercial. In return, the museums and heritage sites are generating more income, including around £250,000 from Elsecar Heritage Centre, and supports more than 350 jobs.

Investing in museums outside London

The Review team is sympathetic to concerns about the imbalance of funding for museums inside and outside London. We support the excellent work of our national museums and recognise the partnership work they already do, but we also know that it is not based on a thorough assessment of need and that each national museum develops its own programme without a joined-up understanding of other museums' activities.

The ACE National Portfolio already has a remit to increase funding outside London from 2018. The partnership framework will also develop a more strategic approach to ensure national collections and expertise are shared across the country (Recommendation 12), informed by the work to understand where public funding is spent across the country (Recommendation 3).

⁷⁰ *Partners welcome findings showing impact of Hull's UK City of Culture year* <https://www.hull2017.co.uk/discover/article/partners-welcome-findings-showing-impact-hulls-uk-city-culture-year/>

V. Delivering cultural education

Learning is at the heart of museums. Respondents to our online consultation were most likely to select education as the primary function of museums. More than two thirds agreed that the museums and art galleries in their area made particular efforts to engage with children, schools and families. A higher proportion of children than adults visit museums, 63% in 2016/17.⁷¹

The challenge is to make sure that all children can benefit from our museums, not just those whose parents have the time and inclination to take them to museums. This can be achieved by school visits, but these have become more complicated to organise as schools have had to cut costs and museums have had to adapt to curriculum changes and new systems of education provision, for example via academies.

The team would like to see even greater emphasis and support given to the formal education work of museums with schools. The *Taking Part* survey shows that children who visit museums are also more likely to grow up to be adults who visit museums, so school visits are also important in diversifying audiences and promoting inclusion.

Schools visiting museums

On average each week, 4% of the child population in England visits a museum. Twice as many 11-to-15 year olds visited museums outside school (48%) as did in lesson time (24%).⁷² A recent survey of formal learning in museums carried out by ACE⁷³ found that in many museums visits are increasing, with much of the growth in visits coming from primary schools. A third reported that the priority given to learning in their organisation had improved.

Museums across the country work with nearby schools to encourage visits. They also develop place-based primary and secondary curricula alongside universities, using local collections; they have dedicated learning spaces; and take museum materials into schools, through resources such as Manchester's Inflatable Museum or Tyne & Wear Archives and Museums' 'Boxes of Delight'. Museums also have specialist programmes focusing on particular groups such as early years, enquiry-based learning and special educational needs.

Arts Council England

Museums and Schools Programme

The Museums and Schools programme was established in 2012, with the aim of providing high-quality museum visits linked to the national curriculum. In particular, it targeted schools in areas of high deprivation and where engagement between schools and regional museums was low. It is funded by the Department for Education, receiving £1.2m per year from 2012 to 2017 as part of the wider Cultural Education Programme.

By 2016/17 the programme consisted of 13 partnerships and locations brokered by ACE, and had engaged 2,100 schools. While activities differ in each partnership they have included the use of primary sources in the classroom,

⁷¹ *Taking Part*, DCMS, 2017.

⁷² *Ibid.*

⁷³ *Now and the future: a review of formal learning in museums*, ACE, 2016.

creation of formal learning offers, increased loans from the national collection to regional museums, and professional development for museum staff and teachers.

Nearly 75,000 school pupils have worked with a local museum through the programme, and more than 4,000 Arts Awards have been delivered. Several national awards have been linked to the programme, including SS Great Britain's Full Steam Ahead online game, which received two digital awards.

Curriculum

The new national curriculum gives teachers more flexibility. Schools now have a choice as regards the topics they teach within the same subject. This can make it more difficult for museums to tailor their offer for students.

Additionally, LA-maintained schools must follow the reformed national curriculum, which was introduced in September 2014, while academies and free schools are not required to teach it. Academies offer new opportunities to work with museums as they have more freedom to set their own curricula (although this requires a close working relationship between school and museum, going beyond the normal curriculum-based offer). There is a challenge to respond to a more varied educational agenda in a current and relevant way.

Impact of museums on children's learning

There is an intuitive link between exposure to collections (and the stories related to them) and improved educational attainment for children, although there is limited data proving it or helping to make the case for a more formal role for museums in education.⁷⁴ A number of government initiatives intending to fill these gaps are in progress, including the Cultural Citizens pilots and funding for the Royal Society of the Arts to work with the Educational Endowment Foundation on an evaluation of cultural learning projects in schools.

In April 2017, ACE Chair Sir Nicholas Serota announced the Durham Commission, which will report in 2019 on how culture and creativity can help children realise their full potential.

Coast.Ed: cultural learning in Adur, Arun and Worthing Museums designing a programme to support the curriculum

Coast.Ed is a formal education service, which includes outreach, school workshops, loan boxes and learning plans designed to fit in with the school curriculum. Developed by Worthing Museum and Art Gallery, Littlehampton Museum, Rustington Museum, and Marlipins Museum, the service was launched in 2014 and covers the coastal area from Shoreham to Littlehampton.

Curatorial staff at Worthington Museum had historically offered an education service to schools in the West Sussex catchment area. ACE funding of around £100,000 supported recruitment of a dedicated project manager who worked

⁷⁴ *A Review of the Social Impacts of Culture and Sport*, DCMS, 2015

with a local Museum Development Officer and a steering group of local partners to develop Coast.Ed, with Worthing Museum as the lead organisation. The service operates on a business model that enables sustainability by allowing income from participating schools to be reinvested in the project.

Coast.Ed sessions are primarily designed for children at key stage 1, but the Coast.Ed brand has expanded to offer educational workshops to students in higher and further education, as well as bespoke sessions. Over six terms, 4,673 schoolchildren from 44 schools engaged with Coast.Ed.

Outside schools

Many museums have explored other ways to develop relationships with young people. Activities offering young people genuine responsibility give them a sense of ownership intended to build an ongoing relationship for the participants and their families with museums. The Kids in Museums' Takeover model organises events when teenagers manage the museum for the day, filling front-of-house and management roles and programming activities.

Many museums such as the National Portrait Gallery, Nottingham Museums and the Imperial War Museum have created Youth Boards to give young people a voice in the museum's programming. The four-year Tate Circuit programme, funded by the Paul Hamlyn Foundation, is working with an older cohort (15-to-25-year-olds) and aims to attract this age group by developing programming that is more socially and politically aware and creatively diverse.

Working in Museums:

VI. Developing leaders with appropriate skills

VII. Diversifying the workforce

There are two pressing issues regarding workforce: the need to diversify in order to help attract more diverse audiences, and the need for excellent leaders with the right skills to guide museums.

There are many schemes on diversity and leadership being run by the sector. HLF gives priority to projects which set ambitious and credible targets for the recruitment of trainees, with the aim of broadening the demographic profile of the heritage workforce. ACE expects National Portfolio Organisations to be accountable for promoting and developing diversity across their work, including leadership and workforce.

Museums have been attempting to tackle workforce diversity issues and to improve leadership skills in the sector for many years. Significant further progress will require continued commitment and coordination. The recent *Character Matters*⁷⁵ report gives an authoritative overview of the issues and the Review team believes that museums should consider and address the recommendations given there.

⁷⁵ *Character Matters: Attitudes, behaviours and skills in the UK Museum Workforce Full Report*, ACE, Museums Galleries Scotland, Museums Association, Association of Independent Museums, 2016.

Summarising the workforce

There are around 33,000 people working in museums and galleries in England⁷⁶ (including over 8,000 in national museums), working with the collections as curators, researchers, educators and conservators; managing operations including finance and human resources; generating income through fundraising and commercial operations; and offering a service to audiences, including retail, catering and visitor services. However, there is little data available on jobs, particularly given increasing – and often necessary – overlap between duties in many people’s roles.

The Review team recommends that ACE consider how to capture and report workforce data, including accurate data on diversity, specifically gender, disability and BAME representation at all levels of the organisation (Recommendation 15).

People in the sector: diversity

The museums sector is predominantly White and female, according to recent research⁷⁷ – although on average, men still earn more and are more likely to hold senior management positions.⁷⁸ Schemes like ACE Changemakers and self-organised forums like Women Leaders in Museums and Museums Detox seek to encourage people from diverse backgrounds into the sector and support them once there.

The museum workforce is highly motivated, committed, skilled and educated: over 88% of employees hold a degree and 59% hold a postgraduate qualification.⁷⁹ New research by the Museums Association has suggested that salary levels in museums are 7% lower than the market average in comparable sectors, rising to 25% below market rate for junior roles in curation and collections management.⁸⁰

In addition, more than half of museum work placements (a route into the sector) are currently unpaid and many are for nine or more months. These factors affect who considers a career in museums: while there is limited information on socio-economic diversity, 20% of the workforce reported having attended a fee-paying school compared to 7% of the UK population.⁸¹ It has been suggested that museums volunteers are likely to be even less diverse than the paid workforce, which in some cases they are replacing.

Diversifying the museums workforce is important both in terms of creating equality of opportunity and also in making museums more relevant to their community and to modern society in general. A diverse workforce helps attract larger and more diverse audiences by generating more creative and inclusive programming.

People in the sector: routes to entry

The situation is exacerbated by the limited opportunities to enter and progress in museums.

⁷⁶ DCMS internal breakdown by UK country, based on *DCMS Sectors Economic Estimates 2017: Employment – Cultural Sub-sector*

⁷⁷ *Character Matters: Attitudes, behaviours and skills in the UK Museum Workforce Full Report*, ACE, Museums Galleries Scotland, Museums Association, Association of Independent Museums, 2016.

⁷⁸ *Ibid.*

⁷⁹ *Character Matters: Attitudes, behaviours and skills in the UK Museum Workforce Full Report*, ACE, Museums Galleries Scotland, Museums Association, Association of Independent Museums, 2016.

⁸⁰ *Salary Guidelines 2017*, Museums Association, 2017.

⁸¹ *Character Matters: Attitudes, behaviours and skills in the UK Museum Workforce Full Report*, ACE, Museums Galleries Scotland, Museums Association, Association of Independent Museums, 2016.

There are over 60 university courses in the UK specialising in museum practice, producing hundreds of graduates in museum studies in England each year. The Review team heard that these courses are not all providing graduates with the skills and knowledge they need in order to work in museums in England today. Museums could engage with the universities to advise them of the skills gaps and provide 'on the job' training opportunities. For instance, in Leeds the museum partners with the university to provide training for museums registrars.

Apprenticeships and other non-traditional routes have potential to improve diversity, especially with the Apprenticeship Levy now being paid by some larger museums. In March 2017, a Trailblazer group⁸² led by the University of Cambridge Museums received approval to develop a new Museum and Galleries Technician standard under which trainees will develop the skills, knowledge and behaviour to carry out the practical aspects of collection care. The V&A already has technical-support staff training, leading to a recognised NVQ.

The London Transport Museum Apprenticeship programme Using apprenticeships to diversify and strengthen the workforce

Since 2014, the London Transport Museum (LTM) has hosted 17 apprentices within their Learning and Customer Service teams. The Apprenticeship programme was developed over seven years of engagement with young people. Apprenticeships at LTM are fully accessible and support entry-level opportunities to learn while performing a valuable and meaningful role as part of core operations, making programming more relevant to participants.

Apprentices spend 12 months at LTM, undertaking an extensive in-house induction and training programme that covers everything from governance, project management and meeting sector leaders to build knowledge. They do this alongside an externally supported Level 2 or 3 NVQ in Cultural and Heritage Venue Operations and a Gold Arts Award qualification.

The apprentices come from a variety of backgrounds. They have a range of interests and do not necessarily have a pre-existing interest in the museum's collection or even the sector. LTM found that after spending one year with the museum, many apprentices were eager to continue to work within the sector. Apprentices have gone on to several different roles within LTM, the wider sector and other sectors; these include staying on in customer service roles, programming public events, becoming part of the learning freelancers, working on youth programmes and going on to apprenticeships at the Department of Transport.

People in the sector: growing expertise

Concerns have been expressed about a hollowing out of expertise in the sector, but a 2016 study⁸³ found that while there is some anxiety about a decline in resources and subsequently knowledge, there are positives – such as a greater focus on connecting with audiences and on creative and diverse narratives – as well as concerns. Curators

⁸² A 'Trailblazer' is a group of employers recognised by the Institute of Apprenticeships as working together to design new apprenticeship standards for occupations within their sectors.

⁸³ *Enquiry into the environment for museum curatorship*, Art Fund, 2016.

outside the national museums do report increasingly being asked to act as generalists, covering more subject areas, and to spend more time on projects and exhibitions and less on collections.

Over 70% of the workforce is engaged in training and Continuing Professional Development (CPD), but training is rarely targeted and concentrates on heritage training, with less on business or management. The most common form of CPD reported is attendance at conferences. The researchers found that the rates of participation in more tailored forms of CPD, such as mentorship, coaching, and job secondments were very low.⁸⁴

22% of the workforce report that revenue-generating activities had been added to their job descriptions in the past three years.⁸⁵ As museums adapt to a new funding environment, make use of new technologies, and seek to engage larger and more diverse audiences, the museum profession will need to change in order to address the new challenges.

Norfolk Teaching Museum, Norfolk Museums Service (NMS) Providing a structured workplace training programme and diversifying routes into the sector

In January 2013 NMS welcomed its first cohort of trainees to its newly established Teaching Museum. It is a unique, service-wide initiative with a vision to equip new professionals with the essential skills needed in the workplace. It places trainees in roles in museums where they get hands-on experience, as well as providing opportunities, such as external visits to support their day job and weekly museums skills training sessions.

Through the Teaching Museum, NMS has been successful in eliminating some of the traditional barriers to a career in museums or cultural heritage, offering a route into the sector not reliant on long periods of unpaid placements or expensive higher education. Of 30 trainees to date, 27 have secured employment in museums/cultural heritage. The fifth cohort of seven trainees has now been appointed.

People in the sector: volunteers

Volunteers are a vital part of the museums sector, with the numbers believed to be in the tens of thousands, although recent data is limited. People volunteer in museums for many different reasons, including interest in the museum or collection, developing new skills, 'giving something back', and being an active part of their local community. Volunteering opportunities can offer social inclusion and build social capital. The Museum of East Anglian Life provides supported volunteering opportunities and therapeutic placements for people with disabilities, learning difficulties, mental health problems or those recovering from illness.

In return, volunteers can significantly increase capacity in individual museums – probably more so today. Some smaller museums are entirely volunteer-run and this can lead to a sustainability issue where the next generation is not forthcoming.

⁸⁴ *Character Matters: Attitudes, behaviours and skills in the UK Museum Workforce Full Report*, ACE, Museums Galleries Scotland, Museums Association, Association of Independent Museums, 2016.

⁸⁵ *Ibid.*

Cambridgeshire's museums

Taking a more strategic approach to working with volunteers

Cambridgeshire's independent museums are mostly volunteer-run. The County Council, which financially supports most of the county's independent museums with some level of annual grant funding, led a project to develop partnership working, looking at volunteer and trustee recruitment, training, coordination and management. At a time of serious reductions in LA funding there was also a need to recruit trustees with financial, marketing and fundraising skills, to improve resilience.

More than 50 front-of-house volunteers were brought in to help the Cromwell Museum in Ely stay open when it moved to trust status in 2016. Cambridgeshire's museums are now recruiting more diverse volunteers with a wider range of skills. The volunteers have better networking opportunities, leading to more sharing of ideas.

Leaders: trustees

According to ACE's analysis of the Major Partner Museums, boards tend to be less diverse than the workforce.⁸⁶ The *Strategic Review* considers this issue for the DCMS-sponsored museums. The Review team's fieldwork has also suggested that many museums are not strategic enough in their approach to governance or identifying and attracting the skills and networks that they need, nor do they always work with them to best effect.

Boards can be an effective way of bringing new skill sets and networks into the organisations. For example, a number of the national museums now have a 'digital' trustee on their boards. It was suggested that museums should apply governance guidance more rigorously.

Leaders: rounded skills

In an environment with reduced public sector funding, museum leaders increasingly need to combine sector and curatorial expertise with business management to operate effectively and drive their museum's success. They need an understanding of how to use digital technology to support their objectives. Commercial and fundraising skills are crucial, based on a close understanding of audiences. Skills related to partnership working and effective advocacy are also important. These are not always fully developed within all museums.

Leadership skills have long been a concern in the museums sector. Over the past 20 years various schemes have attempted to better equip museum leaders. The Clore Leadership Programme (founded in 2004) is one of the best known, while more recent programmes such as AIM's Hallmarks Museums Leaders Programme, the MA's Transformers, and the Arts Marketing Association's Future Proof Museums, aim at improving leaders' skills and strategic abilities in order to navigate the increasingly complex cultural environment.

⁸⁶ *Diversity in the workforce and governance of Arts Council England's Major Partner Museums*, ACE, 2015.

Leaders: dealing with change

Recent research suggests that the museums workforce needs staff at all levels who are resilient, entrepreneurial, and adaptable in order to thrive and help their museums thrive. Analysis suggests that museums should seek to develop these qualities in the existing workforce (which will be challenging and require sustained intervention), and to change recruitment practices to attract a more diverse and well-rounded workforce that has these particular aptitudes.⁸⁷ The same research shows that, at present, the museums workforce is likely to be more risk-averse than average; but innovation (especially around income-generating activities) requires some risk, which government funding should cover appropriately.

VIII. Digital capacity and innovation

Technology may offer museums new opportunities to improve operating models, communicate with audiences, raise money, catalogue and share collections, and make displays and exhibitions more interactive and engaging. Audience behaviour has been altered forever by online technologies and smartphones. One of the most significant opportunities for museums is to use technology to embrace a more inclusive and participatory approach.

But digital technology is changing fast, and it requires investment in terms of time, money, skills, and the opportunity to experiment – as well as an appreciation and understanding by museums and their leaders of the benefits that digital technology can offer.

Trends in museums' use of digital technology

Nesta and ACE's longitudinal *Digital Culture* survey has, over a number of years, suggested that museums are lagging behind other cultural institutions in their use of digital technology.^{88/89} In 2015, 33% of museums self-identified as late adopters to technology compared with only 22% in the arts and cultural sector.⁹⁰

In the latest figures, museums were less likely than the overall arts and culture sector to see digital as being important in almost every domain measured, except preserving and archiving: 44% of museums said that digital was important to distribution and exhibition, compared to 54% in the overall sector, and museums have lower skills in this area.

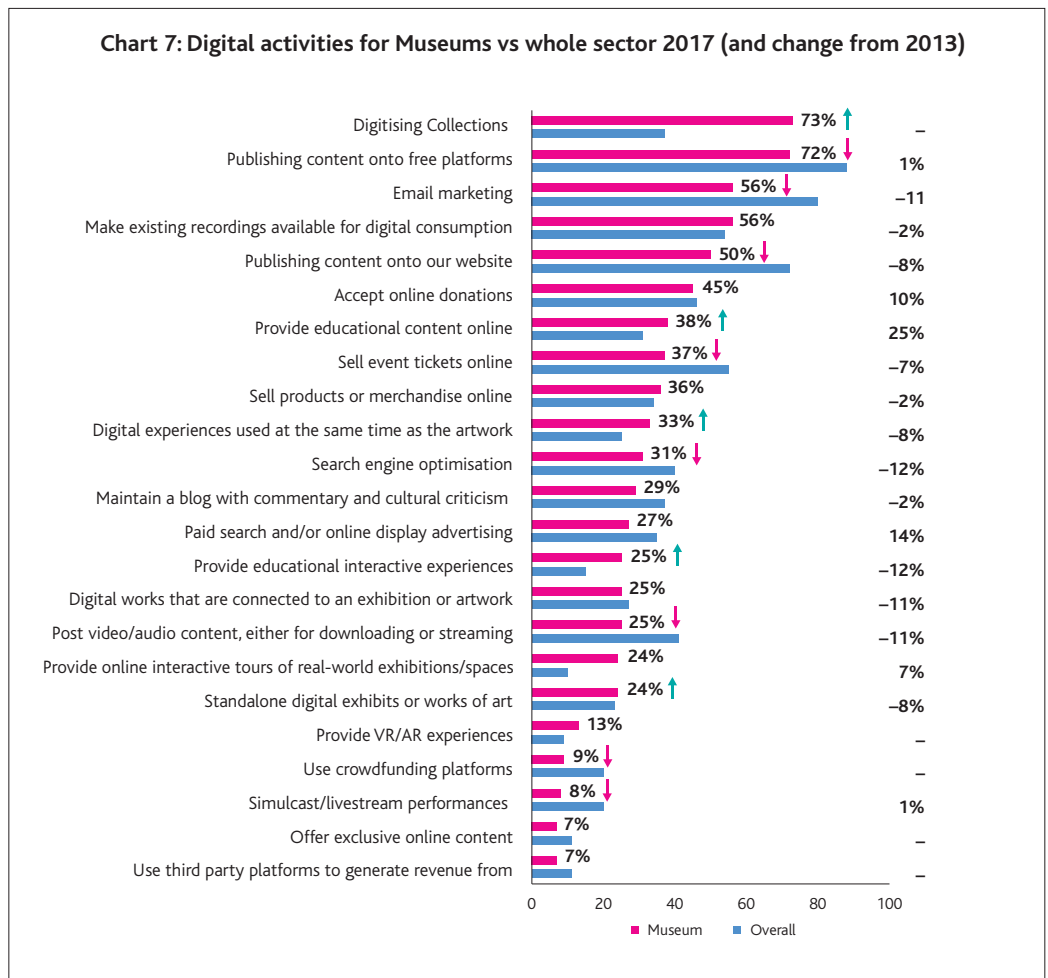
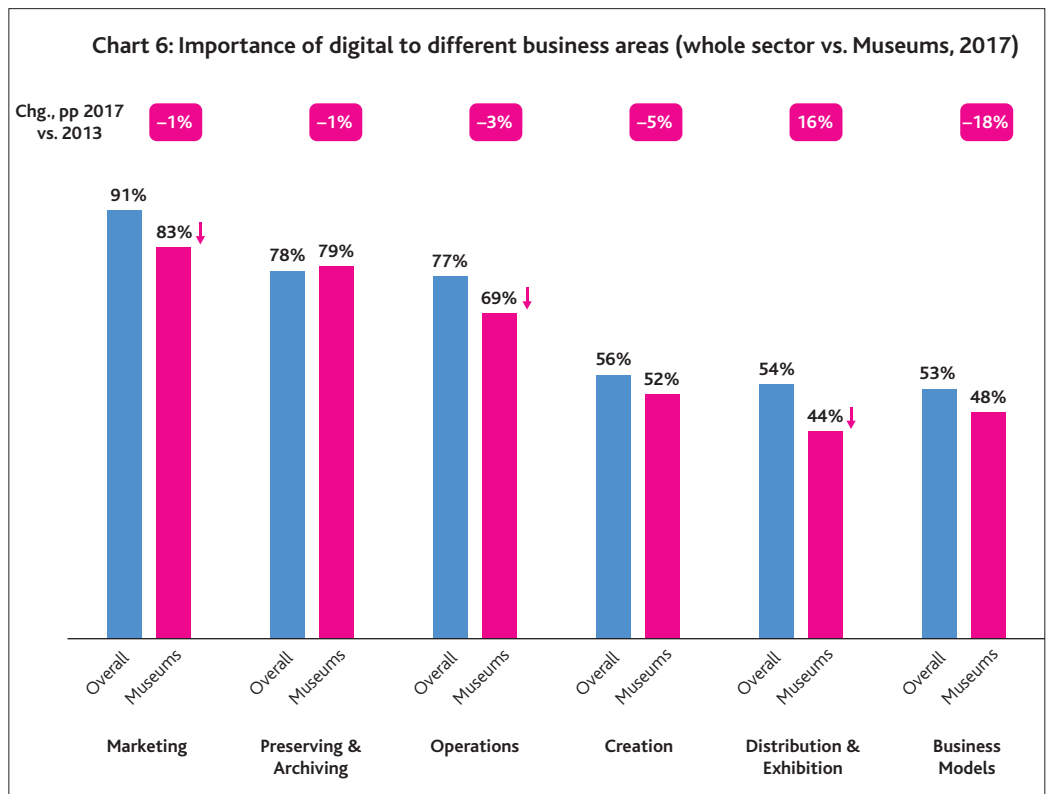
While this may suggest that digital has yet to be fully embedded in the sector, it could also mean that museums are thinking about digital in increasingly targeted ways and using it where it makes a difference. There are significant differences, as might be expected, between how small, medium, and large museums (as measured by turnover) use digital, with large museums undertaking more types of digital activity than the sector as a whole.

⁸⁷ *Character Matters: Attitudes, behaviours and skills in the UK Museum Workforce Full Report*, ACE, Museums Galleries Scotland, Museums Association, Association of Independent Museums, 2016.

⁸⁸ *Digital Culture 2017*, ACE, Nesta and the Arts and Humanities Research Council, 2017. It is worth noting that the sample size for museums has gone from 118 in 2013 to over 200 in 2017 and the museums that choose to self-select into this survey each year will affect the results.

⁸⁹ Charts in this section are reproduced from the *Digital Culture 2017* Museums factsheet, by the kind permission of Nesta and ACE.

⁹⁰ *Digital Culture 2015: How Arts and Cultural Organisations use Technology*, ACE, Nesta and the Arts and Humanities Research Council, 2015.



The lag occurs in specific areas. For example, museums tend to use customer data less frequently (but museums are less likely to sell tickets than many other cultural institutions). They are also less likely to be optimised for mobile, and they use fewer social media platforms. Activities related to collections management and interpretation are the most common, and museums provide more educational content digitally than the overall sector.

Taking a strategic approach

Many museums are embracing digital technology as an integral part of the overall visitor experience before, during and after a visit. But evidence collected through the *Digital Culture* survey suggests that most museums neither think about their use of digital technology nor plan strategically. Two-thirds of museums responding to the 2015 survey suggested that not having a senior leader with a specific remit for digital technology was a barrier to effective utilisation of technology. There are examples of museums that have taken a strategic approach to employing digital technology and are reaping the benefits, but these tend to be the large national museums, including the Science Museum and Tate.

Digitising collections

Museums place great importance on digital technologies when it comes to archiving: 79% feel that preserving and archiving material using digital technology is important to their business practice. They are also more likely than cultural institutions more generally to 'make existing recordings available for digital consumption' (56% versus 50%); 61% have digitised up to half of their collection, and half of those with a digitised collection have made some of it available online.

Museums see the opening up of their digital collections as a way of broadening and deepening their audience engagement. The numbers using museum websites have increased significantly; the national museums have found that this seems to drive increased footfall, rather than replace physical visits. However, there is a need to carry out this work carefully, given the speed with which technology improves; a collection digitised years ago into poor-quality photographs and stored on floppy disks sitting on an office shelf is little use today. Equally, not everything a museum does requires a digital footprint.

Digitised collections offer new opportunities for both research and commercial purposes. For research, digitisation offers the opportunity to look at metadata in new ways, link collections from disparate sources, and conduct new forms of analysis. Museum trading arms are increasing their use of digitised collections to generate income, for example, by licensing images from the collection, while also allowing free use for educational and research purposes. Art UK, an online centralised platform for art museum collections, is exploring how it can offer a licensing service to generate income for its members.

Improving communications and operations

Many museums do recognise that digital is important for museums marketing, communications and customer relations management, with suggestions that they should make greater efforts to engage visitors, which may include the collection and responsible use of customer data.

Some ideas could be borrowed from the digital economy. Art Happens, from the Art Fund, is a crowdfunding platform designed for museums and galleries. It has so far

raised around £300,000 from individuals supporting different projects, such as Leeds Art Gallery commissioning a new painting for its Victorian staircase. Museums could consider experimenting with new financial models that make use of digital technologies, such as crowdfunding, Netflix-style monthly subscriptions for memberships, dynamic ticketing pricing, and more effective licensing models.⁹¹ New technologies are also emerging and some museums are already testing Virtual Reality, Augmented Reality, and haptic technology to give visitors new ways to experience collections and understand the stories they tell.

Skills and capacity

In 2015, HLF reviewed the digital outputs of their grant-funded projects and found that even simple digital outputs like websites and images were poor quality and ineffective. They used old-fashioned user interfaces, minimal search engine optimisation and led to little meaningful audience engagement.

Many museums struggle to make good use of digital technology because they do not have staff with the necessary skills and knowledge: basic digital and social media skills and 'IT know-how' are widely cited needs of the museums workforce. Lack of staff time is also a barrier reported by 72% of museums. This reduces what they can do as well as what they can envisage doing, leaving significant gaps in their ability to take advantage of what technology can offer in multiple areas of their work. Museums need to do more to embed digital skills and increase collaboration. Culture24 runs training programmes for museums to improve their understanding of how to use digital technology to better meet their objectives.

Let's Get Real

Building museum digital capacity

Let's Get Real is a collaborative action research programme led by Culture24, helping museums to be relevant and responsive to the changing needs and behaviours of audiences of today. Since 2011, they have worked intensively with 100+ museums to develop their digital skills, build digital capacity, and embed digital meaningfully across their organisation.

Taking part in *Let's Get Real* gives museum professionals the opportunity to learn from and connect with peers, and the confidence, language and skills to become agents for change within their own organisations. Participants come together at workshops to share experiences and knowledge, as well as hear from creative thinkers, digital producers and technology experts. Between workshops they are supported to scope, plan, run and analyse content experiments connected to the deeper social purpose of their organisations, and each experiment is developed with the support of a mentor.

Funding

Funding has proven to be a key barrier to digital programmes and workstreams within museums, particularly if development of those projects contains any uncertainty, or is linked to innovation or Research and Development (R&D) with new forms of technology, as funders are less likely to want to take the risk of funding them. Digitising

⁹¹ *Museum Business Models in the Digital Economy*, Nesta blog

collections (in particular 3D objects) can be costly, and often the end-users anticipate the outputs will be free to use. Consistent with the wider arts and cultural sector, 66% of museums cite a lack of funds for allocation to digital projects as a significant barrier to development in this area.

Conversely, funding can outpace capacity: soon after HLF began to require a digital element to projects an evaluation found that in most of the funded projects the digital aspect had not been done well, resulting in old-fashioned websites, for example, or projects with little engagement with users. There is a need for DCMS, ACE and HLF to work together on how to fund good quality digital projects.

Innovation and sharing best practice

The *Digital Culture* survey suggests that organisations able to experiment and trial new approaches also experience the greatest benefits from technology. R&D requires resourcing and bold action. It involves adopting and adapting good ideas from other sectors.⁹²

The Digital R&D Fund for the Arts Developing museums' digital offer

The Digital R&D Fund for the Arts was a £7m funding programme (£8.3m including in-kind contributions) supporting collaboration between arts and cultural organisations, technology providers, and researchers. The Fund aimed to enable use of digital technologies in the arts sector to engage audiences with art in new ways and/or to create opportunities for new business models for arts organisations.

Grant funding was awarded to 52 projects to generate valuable knowledge and insights on how the arts and cultural sector – across a variety of art forms – can use technologies as part of their development. Each project had an arts, technology and academic partner.

Tyne & Wear Archives and Museums (TWAM) were one of the participants, with £113,000 for the award-winning Collections Dive project to develop an online interface to engage a non-specialist audience with cultural heritage, partnering with Microsoft Research and Newcastle University. Six months after launch, the resulting interface had tripled the number of visitors engaging with online collections and increased their engagement when there. Of the audiences engaging with Collections Dive, 70% reported being inspired by collections they would not have found otherwise, and TWAM staff have learnt how to engage more diverse users by designing for casual, curious audiences.

What next? Digital Culture Project

A digital approach can begin to change the way that people engage with arts and culture: the DCMS Digital Culture Project aims to make the UK a world leader in digital cultural content. It will consider how culture and technology can work together to drive audience engagement, unleash the creative potential of digital solutions, and transform the capability of arts and heritage organisations. This project is addressing how to

⁹² *Digital Culture 2015: How Arts and Cultural Organisations use Technology*, ACE, Nesta and the Arts and Humanities Research Council, 2015.

increase digital literacy and confidence in cultural organisations, including museums, so that digital is embedded within organisations, focusing on increasing financial sustainability, knowledge and understanding of IP rules, data usage and audience engagement, and sharing best practice. The project will also consider issues around the preservation and archiving of digital cultural assets. The Review recommends that the DCMS Museums team should work more closely with a range of other DCMS teams, including Digital Culture, to help museums engage with helpful projects and policies (Recommendation 5).

IX. Working internationally

The UK museums sector is one of the oldest in the world. English museums care for important international collections and their practice is internationally renowned and respected. They play a vital role in: the promotion of UK culture, trade, prosperity and growth through their relationships with culture bodies overseas, based on a mutual appreciation of international collections; in diplomacy; and commercial enterprise. Museums also promote international understanding and support for the UK among international audiences, and introduce UK audiences to global issues.

The ResPublica report *Britain's Global Future: Harnessing the soft power capital of UK institutions*⁹³ showcased three national museums demonstrating innovative partnerships and approaches to global exchanges across the museums sector.⁹⁴ However, international working is no longer the exclusive preserve of the large national museums. Museums of all scope and size are developing their international partnerships and museums have shared an appetite and ambition to do more.

While more museums wish to work internationally, challenges remain. The sector is concerned about the impact of Brexit on operating internationally.

The role of the British Council

The British Council is the organisation dedicated to promoting international cultural relations. Since 2004, more than 150 UK museums have received advice and support, and around 120 have received travel grants, taken part in British Council delegations, or participated in events overseas.

It is currently developing a more strategic approach to supporting international partnerships and attempting to extend the benefits of international relations to non-national museums. The larger national museums with experience of working around the world have a role to play sharing best practice and approaches to international working with the wider sector. The Review team acknowledges this, and has therefore recommended an international strand be developed in the national partnerships framework. (See *Strategic Review: Nationals being International: enhancing Britain's reputation abroad.*)

Establishing new partnerships

Setting up new projects and establishing new international relationships can be challenging, irrespective of the size of the museum. The team heard that staff within ACE, the British Council, and DCMS who are knowledgeable about international

⁹³ *Britain's Global Future: Harnessing the soft power capital of UK institutions*, ResPublica, 2017, <http://www.respublica.org.uk/wp-content/uploads/2017/07/Soft-Power-3.pdf>

⁹⁴ Ibid.

relations and partnerships could benefit the sector by sharing their knowledge and brokering relationships more widely. It was also suggested that there should be better joining-up between these organisations, to help establish new opportunities and broker new partnerships.

The British Council cautions that international partnerships are not necessarily a major revenue-generating opportunity, although some, including the British Museum and the V&A, have made aspects of their international programmes profitable. Instead, the focus is on making and maintaining links in order to foster cultural dialogue. For example, the British Council runs a cost-neutral Museums Academy programme to provide training to museum professionals from around the world.

Collaborating with China

Soft power and skills sharing

World Museum's Terracotta Warriors, National Museums Liverpool (NML)

In 2018, NML will host the terracotta warriors from the tomb of China's First Emperor, Qin Shi Huangdi. This will be the first time in more than 10 years that the warriors have been hosted in the UK and the first UK venue outside of London. The Secretary of State for Culture announced the exhibition when NML were part of the delegation to China for the People to People dialogue (P2P).

The exhibition will run for six months from February to October 2018 and will offer a new perspective on China's history. The exhibition will be a major part of Liverpool's 2018 celebrations, marking 10 years since the city held the title of European Capital of Culture.

Spanning three periods of more than 500 years, it is set to include a number of objects that have never been on show in this country before, including material from museums and institutes from across Shaanxi Province, excavated over the last 40 years from the Imperial Mausoleum and selected tombs. These spectacular artefacts dating from 307 BC to the 2nd century AD, along with remarkable recent archaeological discoveries, not only shed light on the pursuit of immortality and how China's Emperors prepared for the afterlife, but also help us to understand more about everyday life in China more than 2,000 years ago.

Tullie House Museum & Art Gallery, Carlisle, and Imperial Decree Museum, Xuzhou

Tullie House Museum has developed a project in collaboration with the Imperial Decree Museum in Xuzhou, China. The project's aims are to improve understanding of how the Imperial Decree Museum can attract and develop new audiences, and to bring outstanding collections from the Han Dynasty to the UK to be shown alongside Tullie's nationally important Roman collections.

The project benefited from advice from the UK Committee of the International Council of Museums' (ICOM UK) Working Internationally Regional Project – funded by ACE's Museum Resilience Fund – in partnership with the National Museum Directors' Council, the British Council, Heritage Without Borders (no longer in existence), and museums in the UK that have collaborated with Chinese museums. In its fourth year, the main impacts of the project have been a greater understanding of museum management, including for loans abroad,

and dealing with dignitaries and protocol. It has offered opportunities to borrow internationally important collections that have never been seen outside of China and show them to UK audiences

The project has increased the status of both museums on the international stage. In 2015, the Tullie team's visit to China, where they organised handling sessions at three venues, gained national media attention and generated huge interest from regional museums.

Access to funding and opportunities

The £30m Cultural Protection Fund, jointly administered by DCMS and the British Council, shows how government funding can support museums' international work and gain access to their expertise for cross-government priorities. However, museums have experienced difficulties in accessing existing cross-government funds to support international work. For example, we heard there could be better communication around the GREAT campaign and how best the museums sector could support this. There is a role for DCMS to promote awareness of such funding opportunities and support museums in making applications.

Similarly, communication about opportunities to contribute to the UK soft power agenda could be improved. DCMS and the British Council should work with Foreign and Commonwealth Office (FCO) and Department for International Trade (DIT) colleagues to improve museums' opportunities and impact abroad, including sharing examples of museums' work and encouraging participation in international visits (Recommendation 10). Cultural diplomacy and the role of museums in UK's economic and cultural offer is increasingly important as the UK seeks to manage the impact of exiting the EU.⁹⁵

The impact of exiting the European Union

As the UK exits the European Union, museums will play an important role in maintaining relationships with European partners and building or strengthening relationships in the wider world.

There are risks to manage, particularly for the national museums, which have the strongest international profiles as tourist destinations, as leaders of EU-funded projects, and as global institutions for research, as well as in creating important exhibitions. Issues of concern include: being able to attract and keep staff; moving objects across borders on loan, in touring exhibitions, and for research; and EU funding – although figures collected by DCMS suggest that there have never been consistently significant sums of money flowing to museums in England.

As DCMS and ACE work more strategically on funding priorities it will be important to understand the impact of exit, and support museums to manage it. The Review team recommends that DCMS work with other departments, including FCO, DIT, and the Department for Exiting the European Union (DExEU) to understand and mitigate the risks (Recommendation 11).

⁹⁵ Although museums' relationships with European partners are based on the commonalities of collections and expertise and many exist outside of the European Union structure, there are concerns over the future of funding, exclusion from networks and challenges associated with changes to the free movement of people and objects.

Museums, especially the national museums, appear well-placed to continue thriving internationally, using their valuable experience, expertise and skills at generating strong international relationships to contribute to stronger bilateral relationships worldwide. It will be important for museums to face this challenge and use their unique role in public life, nationally and internationally, to help adapt to life outside the EU.

Bowes Museum

Collaborating with partners in France to build a reputation in the UK and internationally

The Bowes Museum collaborated with the Fondation Pierre Bergé – Yves Saint Laurent to create *Yves Saint Laurent: Style is Eternal*. It had approached the Fondation about what they could offer: while it could not attract the same visitor numbers as London, after visiting the museum and showcasing the area around Barnard Castle, the Fondation agreed that the French Chateau style of the museum was a fitting venue for the first exhibition in the UK to present a comprehensive display of the French fashion designer's work and life.

The Bowes committed £50,000 of its own resources and spent a year fundraising £250,000 from sponsors including Fenwick, Durham County Council, Teesside University, and local businesses. Where they would usually expect 110,000 visitors per year with 55,000 paying, the YSL exhibition brought 140,000 visitors with 100,000 paying, making The Bowes 80% self-financing for that year. The exhibition has established The Bowes as a significant destination for fashion history and was instrumental in the creation of a partnership with the V&A that allowed The Bowes to be the only UK site outside London to host the V&A's 2016 *Shoes: Pleasure & Pain* exhibition, before it moved to China.

Conclusion

Over these pages I have set out the challenges faced by museums at this moment in time; how government can help to address them by working better together as funders; and how departments and ALBs can help develop a better policy environment for museums. Of course, there is also much for museums to do themselves too, both individually and as a sector. We have referenced a number of case studies showing how museums are already tackling these challenges.

Our work as a Review does not stop here. Over the coming months, I hope DCMS and its ALBs and sector partners will start implementing the recommendations set out here. In particular, there will be a Museums Action Plan, to be delivered by ACE and HLF, and facilitated by DCMS setting out how they will work together to align their efforts and support the sector more effectively. There will also be a partnership framework setting out how the national museums will work more strategically across the country. I expect DCMS to produce an update in a year's time to let the sector know what progress has been made on each recommendation.

Neil Mendoza, 2017

Annex A: Acknowledgements

Lead Reviewer Neil Mendoza and the Review team are grateful to the following organisations and individuals whose inputs made the Museums Review possible.

Museums Review Challenge Panel

Charles Alexander (Chair) – Lead non-executive board member, DCMS

Hasan Bakhshi – Director of Creative Industries, NESTA

Janet Barnes – Former Chief Executive, York Museums Trust

Emily King – Historian, writer and curator

Sandy Nairne CBE FSA – Historian, curator and former director of the National Portrait Gallery

Polly Staple – Director, Chisenhale Gallery

Dr. Simon Thurley, historian, who was commissioned to produce a state-of-the-nation report to inform the Museums Review.

Museums Review Programme Board

Elliott Ball – DCMS Spending and Strategy Lead, HM Treasury

James Bird – Head of Arts, DCMS

Anna Carter – DCMS Spending and Strategy Lead, HMT

Joe Dean – Business Strategy and Governance, MoD

Michael Gallagher – Public Bodies Reform, Cabinet Office

Jillian Kay – Director of Local Government Policy, DCLG

Dominic Lake – Former Deputy Director of Arts, Libraries and Cultural Property, DCMS

Joanna Mackie – Deputy Director of Curriculum and Standards, DfE

Victoria MacCallum – Head of EU Exit, (Formerly Deputy Director, Museums, ALBs, Honours and Appointments), DCMS

Clare Pillman – Director, Culture, Tourism and Sport, Department for Culture, Media and Sport, DCMS

Tim Sparrow – Director of Finance and Commercial, DCMS

ACE

Sir Peter Bazalgette – Former Chair

Paul Bristow – Director of Strategic Partnerships

Phil Cave – Director of Engagement and Participation

Isabel Churcher – Senior Manager, Museums

Scott Furlong – Director, Collections and Cultural Property
Edward Harley – Chair, Acceptance in Lieu Panel
Darren Henley – Chief Executive
Liz Johnson – Senior Project Manager
Simon Mellor – Deputy Chief Executive
John Orna-Ornstein – Former Director of Museums and Cambridge
Sir Nicholas Serota – Chair
Hedley Swain – South East Area Director
Jane Tarr – Director of Organisational Resilience and Environmental Sustainability

Egeria

Adrian Babbage, Director, for providing data to inform the Review team.

HLF

Sir Peter Luff – Chair
Karen Brookfield – Deputy Director of Strategy and Business Development
Ros Kerlake – Chief Executive, Heritage Lottery Fund
Fiona Talbott – Head of Museums, Libraries and Archives

DC Research

Stephen Connolly, Director
Jonathan Durnin, Director

Meetings and roundtables (and case studies)

Nial Adams – Principal Museums Officer, East Riding of Yorkshire Council
Marcus Agius – Chair, Kew Gardens
Peter Ainsworth – Chair, Big Lottery Fund
Vidhya Alakeson – Chief Executive, Power to Change
David Anderson – Director General, National Museum Wales
Lesley Ann-Kerr – Head of Access, Learning and ICT, Welsh Government
Maggie Appleton – Chief Executive, Royal Air Force Museum
Kate Arnold-Foster – Co-Chair, University Museums Group
Xanthe Arvanitakis – Commercial and Operations Director, Sir John Soane’s Museum
Bonnie Austin – Manager, People Advisory Services, EY
Dawn Austwick – Chief Executive, Big Lottery Fund
Sally Bacon – Executive Director, Clore Duffield Foundation
Hasan Bakhshi – Senior Director, Creative Economy and Data Analytics, Nesta
Sally Balcombe – Chief Executive, VisitBritain
Alisdair Ball – Head of Collection Management, British Library
Maria Balshaw – (Then) Director, Whitworth Art Gallery

Helen Barker – Assistant Director of Partnerships and Communications, Beamish Museum

Shelagh Beak – Accreditation Coordinator, Axminster Heritage Centre

Alex Beard – Chief Executive, Royal Opera House

Tom Besford – Arts & Heritage Manager, Touchstone Rochdale

Conrad Bird – Director, GREAT Britain Campaign

Barbara Birley – Curator, Vindolanda Trust

Graham Black – Professor, School of Art & Humanities, Nottingham Trent University

Paul Blantern – Chief Executive, Northamptonshire County Council

Ian Blatchford – Chair, National Museums Directors' Council (and Director, Science Museum Group)

Maria Bojanowska – Head of National Programmes, British Museum

Erica Bolton – Senior Partner, Bolton & Quinn

Baroness Jane Bonham-Carter – Former Co-Chair of Committee for Culture, Olympics, Media and Sport, DCMS

Dr Bruce Boucher – Director, Sir John Soane's Museum

Matthew Bowcock – Deputy Director, Watts Gallery

Roger Bowdler – Director of Listing, Historic England

Alistair Brown – Policy Officer, Museums Association

Lord John Browne of Madingley – Chair, Tate Group

Tony Butler – Executive Director, Derby Museums Trust

Jonathan Calloway – Trustee, Wandsworth Museum

Jon Card – Director of Business and Governance, Imperial War Museum

Philippa Charles – Director, The Weston Foundation

Katie Childs – Policy and Projects Manager, National Museums Directors' Council

John Church – Chairman, Axminster Heritage Centre

Regis Cochefert – Director of Grants and Programmes, Paul Hamlyn Foundation

Caroline Collier – Director of Partnerships and Programmes, Tate

Neil Constable – Chief Executive, Shakespeare's Globe

Tim Corum – Director of Curatorial and Public Engagement, Horniman Museum

Rebecca Cox – Principal Policy Advisor, Local Government Association

Louise Cross – Visitor Economy Manager, Shropshire Council

Tracey Crouch MP – Minister for Sport, Tourism and Heritage, DCMS

Dr Nicholas Cullinan – Director, National Portrait Gallery

John Davies – Research Fellow, Nesta

Will Davis – No10

Michael Day – Chief Executive, Historic Royal Palaces

Emma de Closset – No10

Sarah Dennis – Finance Director, National Museum of the Royal Navy

Stephen Deuchar – Director, Art Fund

Richard Deverell – Director, Kew Gardens

David Dewing – Former Director, Geffrye Museum
Robin Diaper – Curator of the Guildhall, Hull Museums Hull City Council
Sally Dixon – Assistant Director of Partnerships and Communications, Beamish Museum
Helen Dorey – Deputy Director and Inspectress, Sir John Soane’s Museum
Ann Drew – Director of Arts and Culture, Business in the Community
Sophie Duncan – Deputy Director, National Coordinating Centre for Public Engagement
Gael Dundas – Assistant Director, Collections Management, Imperial War Museum
Anna Eavis – Curatorial Director, English Heritage
David Edgar – Finance Director, Wallace Collection
Cathy Elliot – Strategic Advisor, Power to Change
Andrew Ellis – Director, Art UK
Mary Ellis – Museums Archives and Libraries Division, Welsh Government
Hadrian Ellory-van-Dekker – Chief Executive, Swindon Museum and Art Gallery
Richard Evans – Director, Beamish Museum
David Evennett MP
Jamie Everitt – Programme Manager, SHARE Museums East
Andrew Farrell – Director, New Heritage Solutions
Jill Fenwick – Managing Director, Association of Cultural Enterprises
Dr Kevin Fewster – Director, Royal Museums Greenwich
Dr Gabriele Finaldi – Director, National Gallery
Baroness Simone Finn
Jane Finnis – Chief Executive, Culture24
Dr Hartwig Fischer – Director, British Museum
Mark Fisher – Director, Office for Civil Society, DCMS
Mark Fisher – Minister for Arts 1997-1998, DCMS
Dr David Fleming – Director, National Museums Liverpool
Dr Susan Foister – Deputy Director and Director of Public Engagement, National Gallery
Dame Liz Forgan – Deputy Chair, British Museum and Former Chair, ACE and HLF
Hannah Fox – Silk Mill Project Director, Derby Museums Trust
Heather Francis – Director of Finance and Resources, V&A
Anupam Ganguli – Finance Director, Royal Museums Greenwich
Mala Gaonkar – Trustee, Tate
Dame Helen Ghosh – Director General, National Trust
John Glen MP – Parliamentary Under Secretary of State for Arts, Heritage and Tourism, DCMS
Mary Godwin – Director, Cornwall’s Regimental Museum
Jay Gohil – Finance Director, Sir John Soane’s Museum
Kevin Gosling – Chief Executive, Collections Trust
Helen Goulden – Executive Director, Innovation Lab, Nesta
Michael Gove MP – Secretary of State for Environment, Food and Rural Affairs, Department for Environment, Food and Rural Affairs (Then Justice Secretary)

Christopher Gray – Museums Secretary, Royal Museums Greenwich
Adrian Green – Secretary, Durham Museum & Heritage Centre
Simon Green – Director of Cultural Services, Hull Museums, Hull City Council
Bill Griffiths – Head of Programmes, Tyne and Wear Archives and Museums
Jane Griffiths – Volunteer Coordinator, Axminster Heritage Centre
Paul Griffiths – Head of Operations/Managing Director, Mary Rose Museum
Mark Grimmer – Creative Director, 59 Productions
Sophie Hackford – Director, WIRED Consulting and WIRED Education
Abbey Hall – Learning and Development Manager, The Lightbox
Gary Hall – Chief Executive, Culture Coventry
Peter Hall – Curator, The Lightbox
Camilla Hampshire – Museums Manager and Cultural Lead, Albert Memorial Museum and Art Gallery
Matt Hancock MP – (Then) Minister for Digital and Culture, DCMS
Karime Hassan – Chief Executive, Exeter City Council
Sharon Heal – Director, Museums Association
Sarah Healey – Former Director General, DCMS
Fran Hegyi – Executive Director, Hull City of Culture UK
Sophie Henderson – Director, Migration Museum Project
Rebecca Hill – Art Curator, Oldham Gallery
Laurence Hitchcock-Vice Chair, Axminster Heritage Centre
Marie Holland – Arts and Engagement Manager, Tameside Metropolitan Borough Council
Susan Hopkinson – Museum and Heritage Manager, North Lincolnshire Council
Sue Hoyle – Director, Clore Leadership Programme
James Hughes-Hallet – Chair, Esmée Fairbairn Foundation
Tristram Hunt MP – (Then) Shadow Education Secretary and incoming Director of the V&A
Dr Edward Impey – Director, Royal Armouries
Janet Jarris – Volunteer Administrator, Crewkerne Museum
Adrian Jenkins – Director, Bowes Museum
Simon Jenkins – Journalist, The Guardian
Eleanor John – Head of Collections, Geffrye Museum
Hannah Johnson – Policy Officer, No10
Penny Johnson – Director, Government Art Collection, DCMS
Helen Jones – Head of Strategy and Advocacy, Science Museum, Science Museum Group
Sam Jones – Head of Director's Office, Tate Group
Baroness Tessa Jowell, Secretary of State (2001-2007), DCMS
Larissa Joy – Chair, The Foundling Museum
Helen Judge – Director General for Performance and Strategy, DCMS

John Kampfner – Chief Executive, Creative Industries Federation
Roly Keating – Chief Executive, British Library
Emmie Kell – Chief Executive, Cornwall Museums Partnership
Suhair Khan – Lead on UK Initiatives and Partnerships, Google Cultural Institute
Tim Kiddell – No10
Jack Kirby – Group Head of Collection Services, Science Museum Group
Emma-Kate Lanyon – Head of Collections, Shrewsbury Museum and Art Gallery
Robert Lapraik – Deputy Chief Executive Officer – Mary Rose Museum
Ros Lawler – Digital Director, Tate
Neil Lawson – Policy Team Leader, Curriculum Division, Department for Education
Vince Lean – Chairman, Chard Museum
Dianne Lees – Director General, Imperial War Museum
Ian Leete – Senior Adviser, Local Government Association
Benedict Leigh – Curator, The British Museum
Rosemary Leith – Trustee, National Gallery
Howard Lewis, VP Retail Development UK & Ireland, Mastercard
Antonio Lima – Data Science Research Fellow, Nesta
James Lingwood – Trustee, Paul Hamlyn Foundation
Matt Locke – Founder, Storythings
Andrew Lovett – Chief Executive, Black Country Living Museum
Sally Macdonald – Director of the Museum of Science and Industry, Science Museum Group
David Macmillan – latterly Chair, Pallant House Gallery
Jane Mann – Trustee, Bailiffgate Museum
Kate Mavor – Chief Executive, English Heritage
Tom Maycroft – Chief Executive, South West Heritage Trust
Ellen McAdam – Director, Birmingham Museums Trust
Julie McLaren – Associate Director of Programmes, Arts & Humanities Research Council
Zak Mensah – Head of Transformation, Culture Team, Bristol City Council
Nick Merriman – Director of Museums and Collections, University of Manchester
Keith Merrin – Chief Executive, Sunderland Culture
Chris Michaels – Digital Director, National Gallery
Steve Miller – Head, Norfolk Museums Service
Valerie Mills – Commercial Director, Brooklands Museum
Steve Minnitt – Head of Museums, Somerset, South West Heritage Trust
Kerstin Mogull – Managing Director, Tate
Justin Morris – Director of Public Engagement, Natural History Museum
Alex Morrison – Trustee, Art UK
Ian Morrison – Head of Planning, Historic England
Geoff Mulgan – Chief Executive, Nesta
Janice Murray – Director General, National Army Museum

Tamalie Newbery – Executive Director, Association of Independent Museums
Jonathan Newby – Deputy Director and Chief Operating Officer, Science Museum, Science Museum Group
Lizzie Noel – Non-Executive Director, Ministry of Justice
Mike O'Connor – Museum Director, Operations, National Army Museum
Annie O'Neill – Arts and Heritage Manager, Oldham Metropolitan Borough Council
Joanne Orr – Chief Executive, Museums Galleries Scotland
Sarah Paul – Museums Archives and Libraries Division, Welsh Government
Dhikshana Pering – Young People's Officer, London Transport Museum
Karen Perkins – Director of Arts and Museums, Luton Culture
Sarah Philp – Director of Programmes, Art Fund
Victoria Pinnington – Director for Communications and Income, Horniman Museum and Gardens
Megan Piper – Co-founder, The Line
Victoria Pomery – Chief Executive, Turner Contemporary
Anthony Pooley – Deputy Director, The Lightbox
Nisha Popat – Head of Heritage and Arts Services, Leicester Arts and Museums Service
Bob Price – Councillor, Oxford City Council
Derek Purnell – Acting Director, Wallace Collection
Laura Pye – Head of Culture, Bristol City Council and Director, Bristol Museums
Kamran Quadri – Department for Communities and Local Government
Paul Ramsbottom – Chief Executive, The Wolfson Foundation
Ben Rawlingson-Plant – Managing Partner, Brunswick Arts
Tim Reeve – Chief Operating Officer, V&A
Justine Reilly – National Project Manager, Sport in Museums Network
Kathy Richmond – Chair, UK Registrars Group
Graham Riding – Development Manager, Wakefield Council
Carol Rogers – Executive Director, Visitors and Education, National Museums Liverpool
John Roles – Director, Leeds Museums and Galleries
Martin Roth – (Outgoing) Director, V&A
Hannah Rothschild – Chair, Board of Trustees, National Gallery
Sir Paul Ruddock – Former Chair, V&A
Tamsin Russell – Professional Development Officer, Museums Association
Eve Salomon – Chair, Horniman Museum and Gardens
Ingrid Samuel – Historic Environment Director, National Trust
Professor Richard Sandell – School of Museum Studies, University of Leicester
Fran Sanderson – Head of Arts Investments and Programmes, Nesta
Richard Saward – Business Services Manager, Sheffield Industrial Museums Trust
Sir Nicholas Serota – Former Director, Tate Group
Kathy Settle – Chief Executive, Leadership for Libraries Taskforce, DCMS
William Sieghart – Chair, Somerset House

Graeme Silcocks – Finance Director, Geffrye Museum
Susie Simmons – Visitor Services Manager, South West Heritage Trust
Moira Sinclair – Chief Executive, Paul Hamlyn Foundation
Lord Chris Smith of Finsbury
Giles Smith – Deputy Director, Heritage and Tourism, DCMS
Paul Smith – Co-Chair, University Museums Group
Sir Peter Soulsby – Mayor of Leicester
Phil Spence – Chief Operating Officer, British Library
John Stack – Digital Director, Science Museum Group
Phil Stenton – Research Scientist, BBC Research and Development
Sarah Stewart – Chief Executive, NewcastleGateshead Initiative
Kim Streets – Director, Museums Sheffield
Pauline Tambling – Chief Executive, Creative and Cultural Skills
Matthew Tanner – Chief Executive, SS Great Britain
Sue Thiedeman – Head of Culture and the Visitor Economy, Barnsley Metropolitan Borough Council
Helen Thomas – Head of Museums and Cultural Heritage, British Council
Paula Thomas – Finance Director, Horniman Museum and Gardens
Nicholas Tromans – Curator, Watts Gallery
Suzie Tucker – Head of Strategy and Communications, National Museums Directors' Council
Professor Dominic Tweddle – Director, National Museum of the Royal Navy
Ed Vaizey, MP – (Then) Minister for Digital and Culture, DCMS
Colin Vallance – Head of Hospitality and Heritage, South West Lakes Trust
Sir David Verey – Non-Executive Director, DCMS
Heather Viles – Professor of Biogeomorphology and Heritage Conservation, University of Oxford
Des Violaris – Director of UK Arts and Culture, BP
Janet Vitmayer – Chief Executive, Horniman Museum and Gardens
Sarah Wajid – Change Maker, Birmingham Museums Trust
Chris Walker – Director of Finance and Operations, National Gallery
Philip Walsh – Chief Financial Officer, Royal Air Force Museum
Esme Ward – Head of Learning and Engagement, Manchester Museum and the Whitworth
Jo Warr – Head of Development, Norfolk Museums Service
Jonathan Watkins – Director, Ikon Gallery
Iain Watson – Director, Tyne & Wear Archives and Museums
Ian Watson – Libraries, Museums and Registrars Manager, Lancashire Museums Service, Lancashire County Council
Guy Weston – Chair, The Weston Foundation
Jane Whittaker – Finance Director, British Museum
Helen Wilkinson – Deputy Director, Association of Independent Museums

Emily Williams – Assistant Director of Curriculum, Department for Education

Helen Williams – Digital Culture, DCMS

Duncan Wilson – Chief Executive, Historic England

Jon Wilson – Director, Leicestershire County Council

Rob Wilson MP – (Then) Minister for Civil Society, DCMS

Allan Winn – Director and Chief Executive Officer, Brooklands Museum

Mike Woodward – Chief Operating Officer, York Museums Trust

John Wright – Secretary, Tynemouth Voluntary Life Brigade, Watch House Museum

Michelle Wright – Chief Executive, Cause 4

Christopher Yates – Deputy Director, British Museum

Annex B: A history of museums policy

State action

The history of public museums in England began in 1683, when the Ashmolean museum opened its doors. The British Museum was founded by Act of Parliament in 1759, using a public lottery to fund the acquisition and display of Sir Hans Sloane's collection of objects. The next Parliamentary decision produced an equivalent for art: the National Gallery opened in Pall Mall in 1824, with just 38 paintings. In 1857, the South Kensington Museum opened, without a founding collection but with a remit to collect the best works of science and art to educate the taste of manufacturers and the public. The Natural History Museum opened nearby in 1881, then as a branch of the British Museum.

In the first half of the 19th century it was left to philanthropists and learned societies to establish cultural collections in the regions, alongside hospitals, schools, and libraries. In 1845, the Museums Act provided local government with the power to raise rates to open museums of their own, with collections to be held in trust for their citizens in perpetuity. By 1870 only 12 local councils had taken advantage of this, while local societies were running more than fifty public museums, growing to around 190 museums in Britain by 1880.

By the time the Museums and Gymnasiums Act was passed in 1891, interest from newly-reorganised local government had increased, and local authority museums and galleries became commonplace. Around six museums a year opened towards the end of the 1800s, and by 1911 Britain could claim around 545 museums.

The rise of instrumentalism

In the early Victorian period, the chief purpose of museums was entertainment. Galleries were populist, free, and patronised by the working people of their cities. By 1900, competition started to creep in, with cinema, shopping, travel and theatre offering alternatives.

It was around this time that the role of museums in formal education was recognised. A series of reports and Acts of Parliament emphasised the place of museums in schooling and the Ministry of Education loudly supported the 1913 Act, placing the National Heritage Collection in the safekeeping of the Office of Works.

The first Museums Review

In the 19th century, Parliament had satisfied itself with the establishment of museums. In 1927, the government set up the Royal Commission on National Museums and Galleries. Its original job was to look at the funding and collecting of the national museums – in anticipation the National Museum Directors' Council (NMDC) was established to respond to and implement the recommendations. The Commission then

expanded to an examination of the whole museum landscape in England, and especially the relationship between the national museums and those outside London.

Both the survey of the sector as a whole and its identification of these particular issues would become recurring themes in the history of government's role in museums.

There was a competing review. The Museums Association (MA), established in 1889 and then, as now, a body bringing together people working in museums and campaigning on their behalf, commissioned the Carnegie United Kingdom Trust to carry out a report on regional museums in 1928. The Miers report looked at the 530 museums then in England and reported on their shortcomings in training, standards, and funding. Ten years later, they commissioned the Markham report, which found over 800 museums and an overwhelming need for government policy to give direction and provide oversight to the sector.

A minister for culture

In 1931, the Royal Commission had been made a Standing Commission to promote co-operation between national and regional institutions, and to encourage those who might aspire to be public benefactors. This organisation fulfilled the role of Government's advisory body to museums.

In 1964, government acquired a minister for it to advise: the new Labour Prime Minister Harold Wilson appointed Jennie Lee as the first official Minister for the Arts.

Lee inherited a world where central government had just accepted that it had a financial responsibility to local museums. In 1960, the Standing Commission had undertaken another review: the *Survey of Provincial Museums and Galleries*, or Rosse Report, listed 876 regional museums with permanent collections and recommended steps on acquisitions, education, workforce, financing, and buildings – but its key suggestion was that an experimental area museum service established in the south west in 1959 should be extended. From May 1963, Government funded a museums development service in each region of England. The following year, the Public Libraries and Museums Act set out a new basis for local government to operate or otherwise support local museums.

Lee did not waste any time stepping into this world. The White Paper: *A Policy for the Arts – The First Steps* was published in February 1965. This landmark paper in arts, culture, and what we now term the creative industries, recognised the need for a coherent funding policy for the arts. Its effect was to double the purchase grant of the national museums and rapidly increase Arts Council (ACE) funding, including £2.75m for building between 1965 and 1971, unleashing a massive drive of cultural capital projects. New museums, galleries, and concert halls sprang up all over the country.

The mid-1960s also brought another reorganisation of local government. The impact on museums was new independent identities for many district council museums previously part of libraries, and a new and diverse set of themes. Museums were set up to tell the stories of social history, working history, and archaeology – and especially to preserve the newly-recognised value of industrial history.

In the 1970–74 Heath government, museums moved into the care of Lord Eccles in the Department for Education, with a team of civil servants working directly with the national museums under central Government auspices. Meanwhile, in the wider sector industrial sites and other local history museums remained in local ownership and care, keeping the links between the community and its history.

Volunteers were crucial in establishing and maintaining many of these new museums, and from the 1970s through to the 1980s the number of museums grew considerably, thanks to their time and dedication. The Association of Independent Museums (AIM) was founded in 1977 to represent and guide these museums.

In 1973, Lord Eccles commissioned the Wright report to review the needs of the principal local museums and look at their relationships with the nationals. This led to a follow-up in 1979, the Drew Report, which proposed the identification of regional museums of excellence to receive funds from central Government.

The Museums and Galleries Commission replaced the Standing Commission in 1981, and upon the Drew report recommendations expanded its remit beyond the national museums to local museums, monitoring the nine Area Museums Councils and allocating local grants and purchase funds.

Several elements of the museums landscape we have today were put in place in the 1980s. The National Heritage Act in 1983 gave the V&A, Science Museum, and Royal Armouries their boards of trustees. National museums were given responsibility for their buildings in 1988. And the scheme to recognise museums that meet certain standards, now the Arts Council England ACE Accreditation scheme, began in 1988.

Culture began to receive increases in government funding in 1989 when John Major became Chancellor and then Prime Minister. In 1992, Major established the Department of National Heritage to draw together and manage arts, culture, sport, and heritage. In 1997, the *Treasures in Trust* report was published: shortly before the election, so with minimal impact, apart from the idea that a system should be created to recognise collections of outstanding quality and importance. This became the Designation Scheme.

An interventionist approach

The Labour Government of 1997–2010 brought the Department for Culture, Media and Sport (DCMS), new performance management regimes for national museums alongside other Arm's Length Bodies, and a core focus on instrumentalism (the use of arts and culture to deliver other policy goals like health and education). The new Government set out its direction in a report from the new Secretary of State in 1998. Chris Smith's *A New Cultural Framework* was published against a background of significant additional funding for DCMS (£290m over three years), a new set of delivery bodies, and a new focus on England, with cultural policy devolved in 1999.

In 2000, the Museums and Galleries Commission was merged with the Libraries and Information Commission. The Museums, Libraries and Archives Council (MLA, from 2004) was established to support the sector, alongside new regional bodies, to focus on strategic issues, replacing the Area Museum Councils. The new body was supported by another report, published in 2000: *Centres for Social Change: Museums, Libraries and Archives for All*. It laid out the ambition for museums to be vehicles for "positive social change".

This agenda also saw one of the biggest changes to the museums landscape of this period. Government committed to free access to the permanent collections of the national museums and by 2001 anyone could walk into any of Britain's world-class national museums without paying. In 2005 the Taking Part survey was introduced to track what visitors the museums, and other arts and cultural forms, were succeeding in attracting.

Renaissance

What to do about regional museums at this time was less clear. Smith had set up a task force to look at this part of the sector, and in 2001 it produced *Renaissance in the Regions*. It made detailed recommendations, many on the three key problems it had identified in the regional sector: fragmentation, lack of leadership, and lack of capacity. The core idea was a clear framework for non-national museums centred on regional hubs that would lead museum development for their area – with revenue funding from central government.

The MLA took on responsibility for Renaissance, which never quite took off. The 2009 Selwood report reviewed it and concluded that it had suffered a lack of strategic focus, as well as funding. A new strategy replaced the existing nine regional hubs with 22 partnerships funded on merit.

By 2010 the new coalition government was in place and the world was still suffering after the financial crisis. This was the year that the MLA was abolished and museums functions transferred to Arts Council England (ACE). ACE had just published a 10-year framework, *Achieving Great Art for Everyone*, which a review by former culture minister Estelle Morris concluded did not represent a strategic direction for museums and libraries. In 2011, ACE produced an update, and in 2013 it re-released the 2010–20 strategy as: *Great Art and Culture for Everyone*, with museums fully integrated into ACE's five goals. However, museums funding remained ring-fenced. In 2016, ACE announced the final step towards integrating museums funding, with museums invited to apply in the 2018–22 National Portfolio Organisation funding round.

Back to the Future

In 2005, Estelle Morris and then Secretary of State Tessa Jowell published a discussion paper, *Understanding the Future: Museums and 21st Century Life*, which identified challenges and opportunities for museums, including the relationship between collections and audiences; the role of learning; the importance of careers and leadership; partnerships; and how to measure success.

This was followed in 2006 by a 10-year strategy, *Understanding the Future: Priorities for England's Museums*, from David Lammy, who was by then Minister for Culture. This paper had five priorities: to embed museums in schools; for museums to explore identity in their communities; to use collections more dynamically and collect the present; to foster a skilled and representative workforce; and to get museums working better together with each other and other organisations.

10 years later, Minister for Culture Ed Vaizey published the *Culture White Paper*. The first overarching strategy for arts and culture in 50 years, it prioritised leadership, placemaking, opportunities for young people, new models for funding, and soft power. It also announced the first review of museums in ten years. In September 2016, the present review was launched.

Annex C: Methodology

Museums Review team

The Lead Reviewer for the Review team was Neil Mendoza, a non-executive director at DCMS. The Review team consisted of:

Kate Bellamy – Head of the Museums Review

Lisa Ollerhead – Museums Review Implementation

Imogen Block – Museums Review Implementation

Andrew Smith, James Anderson, and Lucien Smith – Museums Review Secretariat

Strategic Review team

Susan Shaw – Strategic Review

Nicola Guy – Head of Museum Sponsorship, DCMS

Challenge Panel

A Challenge Panel was established to work alongside the Review team to challenge the scope, assumptions, methodology and conclusions of the Review team.

Members of the Challenge Panel were appointed in a personal capacity and did not represent any interest group or particular body. They were independent of any of the directly sponsored museums and their sponsors. The Challenge Panel met three times over the course of the project.

Background

The Museums Review was announced in the the Culture White Paper (DCMS, 2016) and considered how the sector might better deliver on White Paper themes: increasing participation in culture ensuring that cultural sectors contribute to local economies, health and wellbeing across the whole of England and building on existing initiatives to increase our international standing.

Research commissions

Independent expert Dr. Simon Thurley was commissioned to produce a state-of-the-nation report on England's Accredited museums to inform the Review team.

ACE was commissioned to submit data, analysis and informed opinion to the Museums Review. They also submitted a number of case studies, Accredited museums data and reports commissioned from DC Research (on trends in museum funding and governance) and Pomegranate (on learning from museums that have experienced significant change).

HLF was similarly commissioned to share their data and knowledge of the sector, including the impact of HLF capital funding on the financial sustainability of institutions (research also completed by DC Research).

DC Research was commissioned by DCMS to gather figures on the public investment into museums in England over the past 10 years, including central government grant-in-aid, ACE funding, National Lottery funding, local government funding, and funding from universities.

Call for evidence

The Museums Review was officially launched on 5 September 2016 with a Call for Evidence consisting of two surveys, one for members of the public and one for museums and sector bodies. The consultation was closed on 31st October with the Review team having received:

- 1,570 substantive responses to the survey for individuals
- 100 substantive responses to the survey for the museums sector

See Annex D for more information on the Call for Evidence.

A further 32 written submissions were received from a range of museums, charities and other public bodies.

Regional visits and stakeholder meetings

Between July and November 2016, the Review team travelled across the country and met with representatives who run, or have oversight of 150 museums throughout England; from 18 of the museums sponsored by government (including the DCMS-funded national museums) to local authority and independently-run institutions. During the visits, the Review team met with people who run the following institutions:

Royal Albert Memorial Museum & Art Gallery

Axminster Heritage Centre

Bailiffgate Museum

Beamish Museum

Bristol City Council – Bristol Free Museums and Historic Houses

British Library

British Museum

Brooklands Museum

Brunel Institute/SS Great Britain

Chard Museum

Cornwall Museums Partnership

Cornwall's Regimental Museum

Crewkerne Museum

Durham Museum and Heritage Centre

Fusiliers Museum of Northumberland

Geffrye Museum

Greater Manchester Museums Group

Horniman Museum and Gardens
Humber Museums Partnership (partnership of East Riding, Hull and North Lincs)
Imperial War Museum North
Imperial War Museums Group
Lancashire Museums Service, Lancashire County Council
Leeds City Council
Leicester Arts and Museums Service
Leicestershire County Council
Manchester City Galleries
Manchester Museum
Mary Rose Museum
Museums Sheffield
National Gallery
Natural History Museum
National Museums Liverpool
National Portrait Gallery
NewcastleGateshead Initiative
Norfolk Museums Service
Royal Armouries Museum
Royal Museums Greenwich
School of Museum Studies, University of Leicester
Science Museum Group
Sheffield Industrial Museums Trust
Sir John Soane's Museum
Somerset County Council
South West Heritage Trust
South West Lakes Trust
Tate Group
The Foundling Museum
The Lightbox
Tyne & Wear Archives and Museums
Tynemouth Volunteer Life Brigade (Watch House Museum)
Victoria & Albert Museum
Vindolanda (Charitable Trust)
Wallace Collection
Watts Gallery
Whitworth Art Gallery, University of Manchester
York Museums Trust

To inform the Review, the team also met with a wide range of sector bodies, charities, funders and other people with knowledge and expertise from a range of fields. See Annex C for a full list of stakeholders consulted.

Roundtables

The Review team conducted a series of roundtables with industry experts and other key stakeholders to explore the lines of inquiry and develop their recommendations (see Annex A for full list of roundtable attendees):

- 9 February: *Digital: supporting museums to achieve their digital ambitions* – held in London in partnership with Nesta and co-chaired by Matt Hancock, Minister of State for Digital & Culture and Geoff Mulgan, CEO of Nesta
- 22 February: *Sustainability: helping museums adapt to changes in the funding and governance landscape* – held in London in partnership with HLF and chaired by Matt Hancock, Minister for Digital & Culture
- 23 February: *Participation: supporting museums to be more inclusive* – held in Manchester in partnership with ACE and chaired by Lead Reviewer Neil Mendoza
- 2 March: *Local museums: improving local museum provision and, in particular, the prospects of Local Authority-funded museums* – held in Birmingham in partnership with ACE and chaired by Lead Reviewer Neil Mendoza
- 8 March: *Collections: ensuring that collections remain relevant and put to best use* – held in London in partnership with the National Museum Directors' Council and chaired by Lead Reviewer Neil Mendoza
- 14 March: *Workforce: helping the museum sector attract a more diverse workforce and develop effective leaders* – held in London in partnership with the Museums Association and chaired by Neil Mendoza

Terms of reference

DCMS published the following terms of reference for the Museums Review in September 2016.

England's museums and galleries preserve, promote and protect our national heritage. Museums' collections, buildings, expertise and place in local communities enable their unique contribution to the nation's rich and diverse cultural life. The Government is committed to ensuring that arts and cultural experiences, including those offered by museums and galleries, are available to, and benefit, everyone and not just the privileged few.

As announced in the DCMS Culture White Paper (2016), the Department for Culture Media and Sport is conducting a museums review to gain a deeper understanding of the sector, the issues it faces and how it can be best supported by government. In particular, the Review team will cover increasing and diversifying participation; developing local communities; supporting soft power; and creating a resilient museums sector.

Free admission to the permanent collections of national museums will be retained and will not be considered by the Review team.

Objectives

1. BIG PICTURE: To produce a state of the nation report on England's museums.

This is likely to cover:

- Mapping Accredited museums and galleries in England, including: by type (governance model), by collection, by visitor numbers and including geographical distribution (with reference to population, including levels of deprivation).
- How the sector, including audiences and governance (by both national and local government and sector bodies) have changed in the past ten years and how they are likely to change in the next ten.
- Examine the operating models of museums and consider the mix of revenue streams, including understanding the changing relative direct and indirect funding levels from government, ACE, HLF, philanthropy, sponsorship, trusts and commercial enterprise.
- An assessment and recommendations for the roles of government (DCMS and beyond), ACE, HLF and other key agencies in working with museums.
- International comparators.
- Understanding how to measure success and monitor impact & developing effective indicators of progress for the sector.
- Understanding the challenges and opportunities for museums and if government and statutory bodies can better support the sector in the following areas:
 - **Increasing access:** widening participation to all;
 - **Partnerships:** between museums (locally, nationally, in the devolved nations and beyond) and working with schools and universities;
 - **Shared services,** including storage;
 - **Digital:** digitising collections, audience engagement, operations and infrastructure;
 - **Collections:** public engagement, exhibitions and learning programmes, supporting research, expertise, storage, sharing and lending collections, collections development, conservation, digital access, disposals and orphan collections;
 - **Workforce:** skills, increasing workforce diversity and leadership;
 - **International activities,** including sharing collections, touring exhibitions, research, commercial activity and other collaborations.

2. NON-NATIONAL MUSEUMS: To look more closely at accredited local and regional museums to better understand:

- The impact of changes in funding, governance and operating models.
- New models of working – what works, why and how to facilitate transitions; how to deal with museums in difficulty.
- How to ensure collections and expertise are thriving.
- The role of local museums in delivering a local service and contributing to broader Local Authority agendas (including the different expectations and roles of local museums that have moved to trust status).
- The responsibilities of Local Authorities for the provision of services and care of collections.

3. NATIONAL MUSEUMS: To undertake a strategic review of government-sponsored museums and, where relevant, the British Library.

This element of the Review team will do three things:

1. Examine the need for the functions performed by the museums and whether existing funding and delivery models remain appropriate.
2. Examine the capacity for the museums as a group to deliver more effectively and efficiently, including the potential for back office efficiency savings across the group and the group's ability to contribute to economic growth.
3. Assess the control and governance arrangements across the group. The strategic review will consider a number of issues including, but not limited to:
 - The role of government sponsored museums in widening participation in culture;
 - Government-sponsored museums' role and responsibilities within the museum sector;
 - Ensuring collections, expertise and buildings remain world-class;
 - Ensuring public access to national collections;
 - How the overall investment can most effectively be deployed;
 - What criteria should inform investment decisions after the current Spending Review period;
 - Supporting a mixed funding model: what more can be done to incentivise new funding models, partnerships and better use of assets? Is it possible to develop a funding formula for national museums;
 - Understanding the key measures of success (and early warning signs of emerging problems);
 - The long-term cost pressures for national museums and what is government's role in supporting those, now and in the future (for example digitisation, acquisitions and estates).

Annex C-1: DC Research, Data availability and process issues

DEPARTMENT FOR DIGITAL, CULTURE MEDIA AND SPORT (DCMS)

- DCMS provided a detailed funding breakdown for each national organisation directly supported for each year in the study period. This included the funding for the British Library, although this has not been included in the main summary results as it is unclear what proportion of the grant the British Library receives from DCMS goes towards museum-related activities.
- Other DCMS funding figures provided include the DCMS Wolfson grant programme, and top level funding for MLA Council (which is used as a measure of the level of non-national museum investment in museums prior to the responsibilities for museums transferring to Arts Council England in 2012). Whilst DCMS data can be used to identify the funding to the National Museums only, 'DCMS Other' is unable to be categorised by type of museum and none of the DCMS data is able to be disaggregated by type of funding (capital/revenue).

ARTS COUNCIL ENGLAND (ACE)

- Funding data for Accredited Museums in England was provided by ACE for the previous research work carried out by DC Research, and updated figures for the 2015/16 and 2016/17 funding years were provided for this current study. Annualised funding for Major Partner Museums was taken from ACE's webpages⁹⁶.
- In the case of ACE awards generally, and Museum Development funding in particular, caution should be used when looking at trends over time, as the year in which funding awards are included is the financial year the decision about the award was made (rather than necessarily the year in which the award was paid or spent). This is particularly true of Museums Development funding which is listed under one year in ACE's data (annualised figures for this are not available).
- ACE have indicated that data prior to 2011-12 for museum investment under the MLA Council is not readily available, as such top-level figures from DCMS (see note above) have been used as a proxy.

MINISTRY OF DEFENCE (MOD)

- Data on the Ministry of Defence investment in museums was taken from a combination of a recent Review of the Service Museums carried out in 2017⁹⁷, as well financial data from the MoD National Accounts⁹⁸, as well as the individual

⁹⁶ National portfolio organisations & Major partner museums, 2015-18 funding spreadsheet, accessed at <http://www.artscouncil.org.uk/our-investment-2015-18/major-partner-museums>

⁹⁷ <https://www.gov.uk/government/publications/review-of-the-armed-forces-service-museums>

⁹⁸ <https://www.gov.uk/government/collections/mod-annual-reports>

accounts for the three National MoD funding museums for years prior to the coverage of the review⁹⁹.

- Specifically, the Review of the Service Museums was used as the primary source for 2011-12 through to 2015-16, with the exceptions of the Royal Air Force Museum (RAFM) and the National Museum of the Royal Navy (NMRN) in the final year where the organisations' accounts were used (the Review listed figures for this year as 'estimate').
 - Organisations' accounts were used as the source for the earlier period to ensure accuracy with the original source, with the rounded figures provided in the Ministry of Defence Annual Accounts filling gaps where necessary (particularly for Grant in Aid – GIA) funding prior to individual organisations later comprising the NMRN, and in earlier years for National Army Museum (NAM).
- MoD have also provided a general figure for funding to regimental museums. This was indicated as £7.6m for the most recent complete year (2016/17), and MoD have confirmed that this figure is generally representative of annual funding to regimental museums, and can be used for the entire time period, but should be treated as a general conservative estimate of spending.

LOCAL GOVERNMENT

- Financial data for Local Government spend on museums was taken from DCLG data from revenue outturn RO5¹⁰⁰ spreadsheets, and Total Expenditure (comprising Employees and Running Expenses), which was confirmed by DCLG as best dataset to use¹⁰¹.
- The RO5 spreadsheets for 2006/07 and 2007/08 were provided directly by DCLG as the breakdowns for museums and galleries were not available for these years from the DCLG website. From these, category '114: Museums and Galleries' was isolated and used in analysis for all years.
- Partial data for capital is available but has been deemed inappropriate for inclusion due to inconsistency of the measurement (relative to this focus of this study); 2006/07 through to 2008/09 provide a capital spend breakdown for museums and galleries, however this is re-categorised after 2009-10 as 'Culture and Heritage' which includes a number of additional items over and above museums.
- It should be noted that under RO5, line 114 (Museums and galleries) includes expenditure on: all museums and galleries provided by the authority, with permanent collections open to the public; museum services; and grants to independent museums. As such, DCLG data cannot be classified as Local Authority only.
- For 2016/17, the actual total expenditure on 'Museums and Galleries' will not be published until November 2017. In the absence of this data an estimate is used in this report based on the following:
 - Data on the actual level of total expenditure on 'cultural and related services' for 2016/17 was published in August 2017¹⁰², and was reported as: £3,583,493,000.

⁹⁹ <https://www.nam.ac.uk/accounts-and-reviews>; <http://www.rafmuseum.org.uk/about-us/policy-performance/annual-reports-accounts.aspx>; <https://www.gov.uk/government/publications?departments%5B%5D=royal-naval-museum>

¹⁰⁰ RO5 – Cultural, Environmental, Regulatory and Planning Services

¹⁰¹ <https://www.gov.uk/government/collections/local-authority-revenue-expenditure-and-financing>

¹⁰² <https://www.gov.uk/government/statistics/local-authority-revenue-expenditure-and-financing-england-2016-to-2017-individual-local-authority-data-outturn>

- In order to provide an estimate of 'museums and galleries' total expenditure, the relationship between total expenditure on 'cultural and related services' and total expenditure on 'museums and galleries' was assessed. In 2015/16, 'museums and galleries' expenditure accounted for 5.884% of total 'cultural and related services' expenditure. Applying this proportion to the 2016/17 data for total expenditure on 'cultural and related services' provides an estimate of total expenditure on 'museums and galleries' of £210.849 million.

UNIVERSITIES

- Higher Education Funding Council for England (HEFCE) provided data directly for the study regarding the funding it provides to university museums through the Museums Galleries and Collections Fund¹⁰³, with Arts & Humanities Research Council Annual Reports¹⁰⁴ being used for the earlier years when the grant fund was provided by AHRC.
- The University Museums Group provided an estimated funding figure for 2014-15 for direct and indirect support to University Museums, by universities themselves. This figure is heavily caveated, being a snapshot of funding at one point in time, compiled from financial information provided directly from the 30 HEFCE funded museums, galleries and collections (collected and collated by the Universities Museums Group). Furthermore, whilst the investment is direct and indirect support from the university, the extent to which all, or just some of this, can be classed as public investment in museums has not been definitively clarified.

HISTORIC ENGLAND

- Historic England provided data regarding historic suppliers classified as museums by reviewing their data and removing/excluding non-museums from the data. This process identified more than 700 museums, and the transaction data for them was identified and provided for the last twenty years.
- This is the data that has been used, however, it should be noted (as mentioned in Section 2 at the relevant tables) that a notable proportion of this is spending on the National Trust – and the extent to which this is museum spend or not cannot be confirmed.

NATIONAL HERITAGE MEMORIAL FUND

- Financial data for NHMF acquisition grants was provided directly by HLF covering the required period and beyond.
- Data for the specific years under analysis was identified, and a filtering process was used to identify those grants awarded ('approved') for regions within England for museums (i.e. 'Museums and Galleries' in the dataset).
- One award, which was listed as 'Scotland/London' and was a national cross-border acquisition has been included in the analysis.

LIBOR

- A value for total investment from 2013 for LIBOR funding committed to museums was provided by DCMS, which includes museum related educational activity. This totalled more than £56.7 million over the entire time period from 2013.

¹⁰³ <http://www.hefce.ac.uk/rsrch/infrastructure/>

¹⁰⁴ <http://www.ahrc.ac.uk/newsevents/publications/annualreportandaccounts/>

- Allocations of LIBOR awards were provided by organisation, and were identified by the Budget Statement at which the commitment was made. The funding figures were assigned to the financial year within which the Budget Statement was made (e.g. Summer Budget 2015 sits within the 2015/16 financial year). This was with the exception of the £24million which was reported as 'Committed in the last parliament between 2013-15 (greater fidelity not available)', all of which has been allocated to 2013/14.

ONE OFF TREASURY GRANTS

- No additional one-off HM Treasury grants beyond what is already included in other sources have been identified.

HERITAGE LOTTERY FUND

- The approach taken here uses the same data source but is different in approach to that taken for analysis previously carried out by DC Research as part of projects for ACE and HLF in 2016. The source was confirmed by HLF as the best source for assessing the level of investment in museums across England for this study. An updated version of this data to include 2016/17 was provided to DC Research by HLF.
- This data comprises all grants for the period 1993 to 2017, which was cut down to the study period, and grants indicated as approved/closed/completed for **all museums** (i.e. both Accredited and non-Accredited museums) in English regions were identified for all HLF programmes.
- As with the ACE awards, caution is advised with regard to any trend analysis (comparisons over time) with this data, as the specific year that each award is allocated to is the financial year of the decision date of the award (rather than when the award was actually paid out or spent).
- As requested by DCMS following discussions between the study team, HLF and DCMS, the total value of HLF awards classified as 'Round 1 Pass' have now been included in the data used for this report (this is where the approach taken here differs from the previous research mentioned above). This means that the data for HLF includes projects that have been approved and completed in this period as well as funding allocated to projects that have so far only received a Round 1 Pass for their application. As such, the Round 1 Pass investment value is not guaranteed, is open to readjustment over time, and will likely be allocated and spent in subsequent financial years to those covered in this study.
- In terms of capital funding for HLF, this is identified within the HLF dataset as activities listed as 'Construct/Extend/Refurb' which was the same subset used as part of a previous study carried out by DC Research for HLF looking at capital funding specifically.

TAX RELIEFS

- The tax amount settled under Acceptance in Lieu and Cultural Gifts were extracted from the annual reports up to 2015/16 for the scheme¹⁰⁵. Data for 2016/17 was provided directly from Arts Council England for the purposes of this study.

¹⁰⁵ <http://www.artscouncil.org.uk/programme/acceptance-lieu>

- Artefacts being transferred to non-museum organisations or to museums outside England were removed from the dataset. Furthermore, those where the receiving organisations were 'to be confirmed' in the annual reports have also been excluded. As such the figures provided can be treated as a more conservative estimate of the tax relief to museums.
- DCMS have provided annual estimates from HM Revenue and Customs for the value of VAT refunds to museums and galleries over the last 10 years, rounded to the nearest £5million. HMRC stress that these figures are only estimates and should be treated as such.
- The value of tax relief through Gift Aid cannot be identified at this stage.

Annex D: Response to consultation

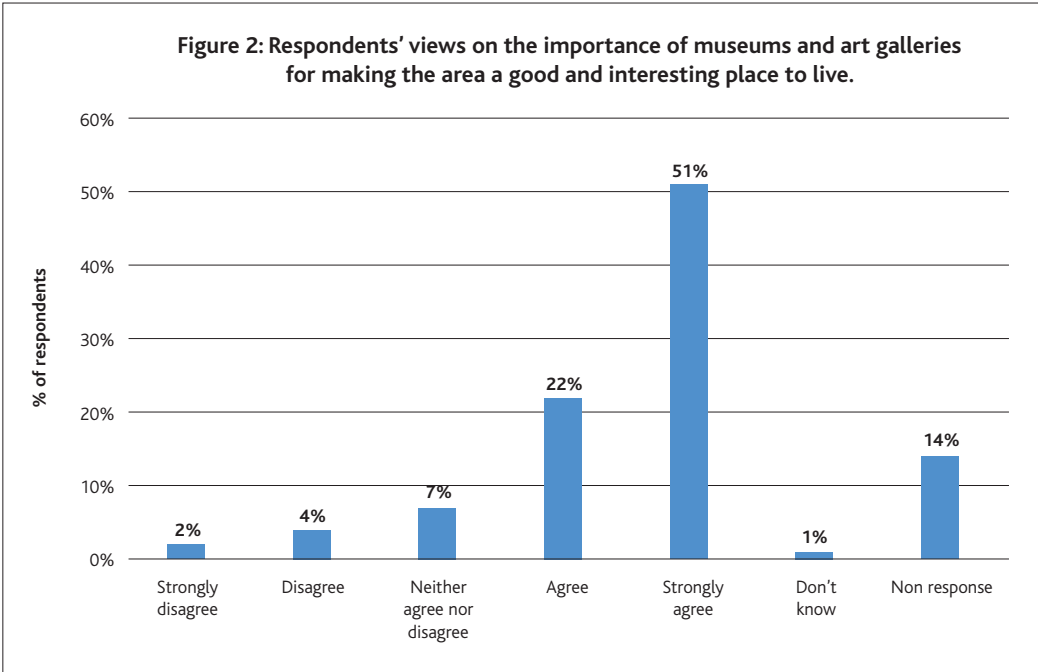
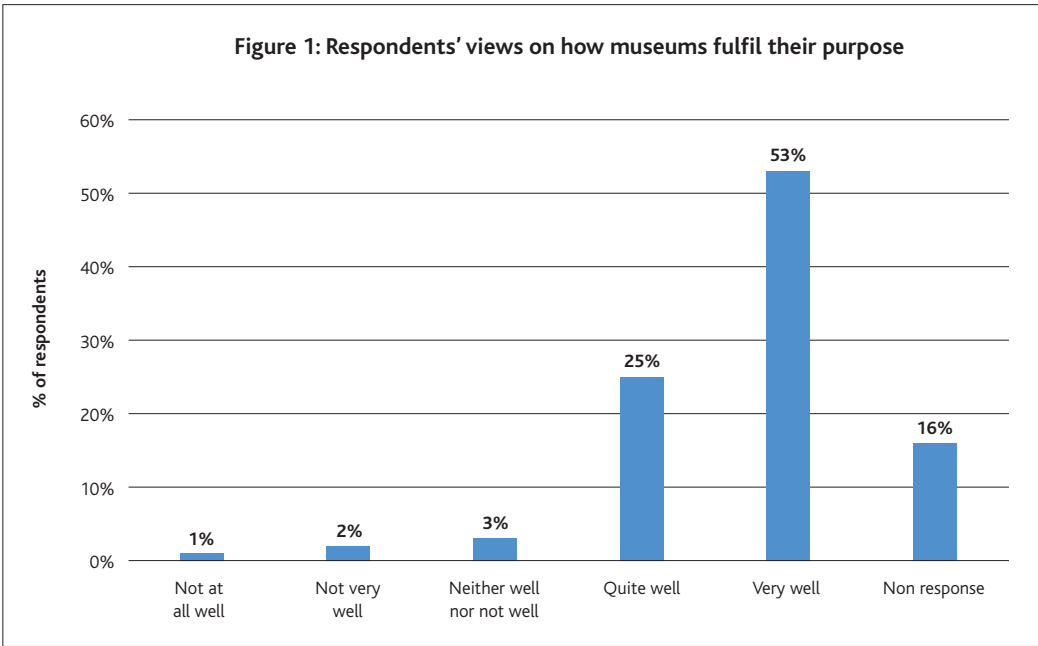
To inform the Review, the team ran two online surveys, one for individuals and another for museums and sector bodies. Both surveys ran from 5th September to 31st October 2016.

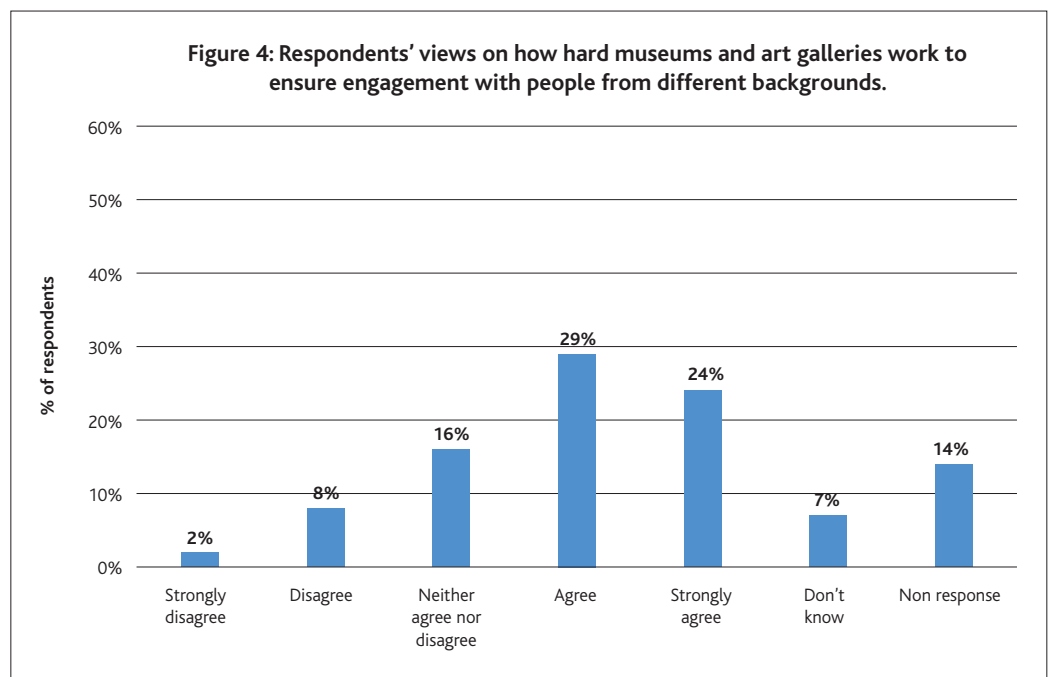
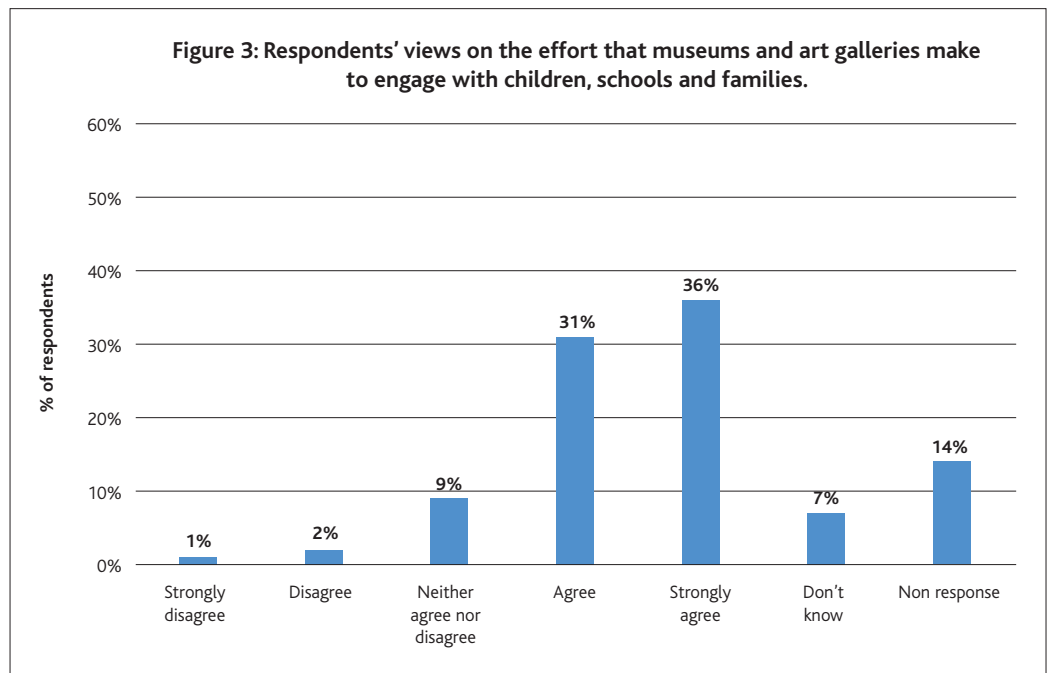
Survey one: For individuals – users and potential users of museums

Overview

- The survey for individuals received 1,570 substantive responses.¹⁰⁶
- Overall, most respondents considered that museums fulfilled their purpose well. Most felt that museums and art galleries in their area made efforts to engage with children, schools and families and worked hard to engage people of different backgrounds. In addition, most considered that museums and art galleries in their area were important for making it a good and interesting place to live.
- White females were overrepresented in the sample and few of the respondents were from different ethnic backgrounds. Over a third of respondents lived in London or the southeast.
 - 45% of respondents had visited a museum or art gallery 4-12 times in the 12 months since July 2015, and just under one third (30%) had visited more than 12 times.
 - The most popular sites visited by the respondents were: the British Museum; the Tate Galleries; the National Gallery; and the Victoria & Albert Museum.
 - Over half (53%) of the respondents considered that museums fulfilled their purpose very well. Very few expressed negative feelings. See Figure 1.
 - Nearly three-quarters (73%) agreed/strongly agreed that museums and art galleries in their area were very important for making it a good and interesting place to live. See Figure 2.
 - Over two-thirds (67%) agreed/strongly agreed that museums and art galleries in their area made particular efforts to engage with children, schools and families. See Figure 3.
 - Over half (53%) agreed/strongly agreed that the museums and art galleries in their area worked hard to ensure that people from all sorts of backgrounds would want to visit and engage. One-tenth of the respondents disagreed/strongly disagreed. See Figure 4.

¹⁰⁶ Although there were 1,783 submitted responses to the consultation, 213 of these were either completely blank or did not contain viable information.





Themes

Museums for education and learning

Participants were questioned about their beliefs in the role of museums and galleries, asking what are they for. Respondents to multiple response questions were clear about the range of benefits museums and galleries can offer to society, with a notable majority of respondents (85%) proposing that museums and galleries are primarily places for education and learning. A number of respondents also identify museums and art galleries as places to be enjoyed (35%) and as places to enthuse and inspire debate and creativity (32%). Respondents recognised the core function of museums and galleries to collect, preserve and display collections (42%), and identified the role that museums and galleries play in preserving and celebrating cultural identity and heritage (28%).

Benefits of local museums and galleries

Respondents praised the public benefit of the collections and displays of their local museums and galleries (46%) and highlighted their benefits in providing locally relevant culture, history and information to the public (31%). Many respondents recognised the opportunities that local museums and galleries provide for learning, inspiration and research (25%). A number of respondents (33%) highlighted the free or reasonable cost of admission to their local museums and galleries as a key benefit, and noted the benefits of the accessibility and proximity of their local museums and galleries (21%). A further 18% of respondents appreciated the opportunities local museums and galleries offered for enjoyment, relaxation, wellbeing and for being sociable (18%).

Opportunities for change

Participants made a wide range of suggestions for how local museums and galleries might do things differently. Notably, respondents to this question highlighted the possibility of change in relation to activities, events and exhibitions (36%), while others suggested making changes to collections, their display and interpretation (18%). Many respondents felt that local museums and galleries could be doing more to engage with different audiences (20%), including children, adults and non-traditional audiences. Respondents also pointed to practical changes that could be made, relating to opening hours (18%), cost of entry and exhibitions (16%), and improving advertising and promotion of the institutions themselves and what's on (20%).

Fulfilling the purpose of a national museum

Over half of respondents that addressed this question understood the role of national museums in preserving and displaying collections and buildings (55%). A number of respondents acknowledged that national museums exist to protect and display collections, buildings and heritage of national importance (36%). Many also posit national museums as places that can provide learning and education opportunities (33%). Some also pointed to the role of national museums in engaging with wide and diverse audiences (14%), and to provide inspiration and enjoyment for their visitors (13%). A number of respondents felt that national museums could fulfil their purpose by engaging further with museums and places outside of London (33%). As a means of fulfilling these aims, respondents also pointed to the provision of more outreach and engagement with new and more diverse audiences (10%), with some also recommending an improved and more diverse workforce (10%).

Survey two: For museums and sector bodies

Overview

The survey for museums and sector bodies received 107 substantive responses¹⁰⁷. Participants represented a wide range of museum, gallery and sector bodies, including but not limited to individuals working or volunteering for local authority-run museums, national museums, trust-run museums, independent museums, university museums and museum funding bodies.

Themes

The combined responses addressed all the questions posed in the consultation. The main themes are summarised below.

Concerns around decreasing government funding

Over three-quarters of respondents agreed that governments should fund museums and galleries (77%). Many expressed concern about decreased government funding and its impact on museums' resilience and sustainability. Respondents also acknowledged the need for museums to generate their own income to tackle reduced government funding. Many attested to a maintenance backlog, with some museums unable to afford to maintain their building and estates. Some respondents suggested that the government should commit to long-term sustainable funding for these institutions, which provide such a range of benefits to the public.

Knowledge sharing and skill building

A number of respondents pointed to improvements that could be made in sharing knowledge, developing skills and improving pay and conditions amongst the existing museum-sector workforce, also noting a lack of diversity amongst the museum staff. Respondents also highlighted opportunities to improve access to employment within the sector through apprenticeships and other funding opportunities.

Role for government in celebrating the benefits of museums

Many respondents said that there is a key role for government, at both a local and national level, in celebrating museums and their range of benefits for society; acting as high-profile advocate for museums in order to encourage more partnerships, visits and charitable giving. This includes government advocacy for the benefits of museums in improving health and wellbeing and encouraging community cohesion.

Leadership skills

Some respondents identified lack of suitable leadership skills as a problem for the sector and urged government to provide funding for leadership training. This would involve more strategic and financial training for sector leaders.

EU Exit

A number of respondents expressed concern over the impact that Brexit would have on the museums and galleries sector, particularly in terms of workforce.

¹⁰⁷ Although there were 395 submitted responses to the consultation, 288 of these were either completely blank or did not contain viable information.

Opportunities

Respondents identified a range of upcoming opportunities for museums:

- Digital technology, some said, offers museums the opportunity to display their collections and tell their stories in engaging new ways and to reach new audiences. Respondents highlighted that opportunities for digital engagement would require government investment.
- Some identified Brexit as an opportunity, with museums offering a neutral space in which to have the difficult conversations of the day.
- Another opportunity identified by a number of respondents was partnerships, both with other museums and with other public and private institutions, nationally and internationally.
- In light of decreased government funding, some respondents recognised opportunities for the multifunctional potential of museums, to become centres for local communities, but also to use their sites and facilities to partner with the private sector and generate their own revenue.

Surveys

Survey one: For individuals – users and potential users of museums

The Department for Culture Media and Sport is conducting a review of England's museums and art galleries with permanent collections (for example the Tate or National Gallery) to gain a deeper understanding of the sector, the issues it faces and how it can be best supported by government.

We would like to hear from you about the role and purpose of museums and about how they can be improved.

Question 1 – What do you think museums and art galleries are for are for? We are really keen to know your views, even if you feel you do not know much about museums. Please tell us about up to three purposes of museums and art galleries, using a separate text box for each purpose.

1
2
3

Question 2 – What do you like about your local museums(s) and art galleries? Please tell us about up to three things, using a separate text box for each thing.

1
2
3

Question 3 – What could your local museum or art gallery do differently? Please tell us about up to three things, using a separate text box for each thing.

1
2
3

Question 4 – The museums and galleries listed below are all national museums and art galleries, which means they have collections of national importance that are directly funded by central Government. Please tick which of these you have visited in the past 12 months. Note that some have multiple sites – it does not matter which of the sites you have visited

British Museum
Imperial War Museums (IWM), which is the IWM London, IWM north, IWM Duxford, Churchill War Rooms and HMS Belfast
National Gallery
National Museums Liverpool, which are the International Slavery Museum, Lady Lever Art Gallery, Merseyside Maritime Museum, Museum of Liverpool, Sudley House, Walker Art Gallery and World Museum
National Army Museum
National Museums of the Royal Navy, which are HMS Caroline, National Museum of the Royal Navy in Hartlepool, HMS M.33, National Museum of the Royal Navy in Portsmouth, Fleet Air Museum, Royal Navy Submarine Museum, Royal Marines Museum, HMS Victory and the Explosion Museum
National Portrait Gallery
Natural History Museum, which has two sites (the main site in South Kensington, London and another in Tring, Hertfordshire)
Royal Armouries, which has museums in Leeds, at the Tower of London and in Fort Nelson
Royal Air Force Museum in either Cosford or London
Royal Museums Greenwich which are the National Maritime Museum, Royal Observatory, Queen's House and Cutty Sark
Science Museum Group, which is made up of the the Science Museum in South Kensington, National Media Museum in Bradford, National Railway Museum in York, Museum of Science and History in Manchester
Sir John Soane's Museum
Tate Galleries, which are the Tate Modern, Tate Britain, Tate Liverpool and Tate St. Ives
Victoria and Albert (V&A) Museum, which has two sites in London, the main V&A Museum in South Kensington and V&A Museum of Childhood in Bethnal Green
Wallace Collection
None

Question 4 – In your view, what is the purpose of a national museum?

Question 5 – Still thinking about national museums and art galleries, how well would you say that they fulfil that purpose?

1. Not at all well
2. Not very well
3. Neither well nor not well
4. Quite well
5. Very well
6. Don't know

Question 6 – In your view, how could national museums better fulfill that purpose?

Question 7 – Please indicate how much you agree or disagree with the following statements:

	Disagree strongly	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know
The museum(s) and art galleries in my area are very important for making it a good and interesting place to live						
The museum(s) and art galleries in my area make particular effort to engage with children, working with schools and families						
The museum(s) and art galleries in my area work hard to ensure that people from all sorts of backgrounds want to visit and engage with it/them						

Question 8 – Is there anything else you would like to tell us about museums and art galleries? This can be about museums local to you or any others.

Question 9 – We'd now like to know a little bit more about you. This information is entirely confidential and will only be used to help us analyse the results of this survey.

What is your gender?

- a. Male
- b. Female
- c. Other gender identity
- d. Prefer not to say

Question 10 – Can you please tell me which of the following age groups you fall into:

- a. Under 16
- b. 16-24
- c. 25-34
- d. 35-54
- e. 55-64
- f. 65 or older
- g. Prefer not to say

Question 11 – Are you a parent or carer of children aged under 16?

- Yes
- No
- Prefer not to say

Question 12 – Which part of the UK do you live in?

- a. North East England
- b. North West England
- c. Yorkshire and the Humber
- d. East Midlands
- e. West Midlands
- f. East of England
- g. London
- h. South East of England
- i. South West of England
- j. Wales
- k. Scotland
- l. Northern Ireland

Question 13 – Which of the following best describes your ethnic background?

- a. Any white background
- b. Mixed / multiple ethnic backgrounds
- c. Asian / Asian British
- d. Black / African / Caribbean / Black British
- e. Other
- f. Prefer not to say

Question 14 – Thinking of the income of your household as a whole (including income from all sources, not just paid work), which of the groups on the list below represents the total income of your whole household before deductions for income tax, National Insurance etc. Please be reassured that all information you give is confidential.

The list below shows annual amounts but the monthly and weekly equivalents are shown when you hover over each option:

- Up to £5,199 per annum
- £5,200 up to £15,599 per annum
- £15,600 up to £25,999 per annum
- £26,000 up to £36,399 per annum
- £36,400 up to £46,799 per annum
- £36,400 up to £51,999 per annum
- £52,000 up to £74,999 per annum
- £75,000 up to £99,999 per annum
- £100,000 or more per annum
- Prefer not to say

Question 15 – Do you have any physical or mental health conditions or illnesses lasting or expected to last for 12 months or more? Again, please be reassured that all information you provide is confidential:

- Yes
- No
- Don't know
- Prefer not to say

Question 16 – How many times have you visited a museum or art gallery in the last 12 months, i.e. since July 2015? This can be to any museum or art gallery, including small local museums and galleries as well as the larger national museums and also includes museums outside of the UK.

Please select which option best applies to you from the list below. By times we mean separate visits on separate occasions but it can be to the same museum – i.e. if you have only visited one museum but have been there on five different occasions you would select

- 1-3 times
- 4-7 times
- 8-12 times
- More than 12 times
- None – have not visited a museum at all in the last year
- Don't know

Survey two: For museums and sector bodies

The Department for Culture Media and Sport is conducting a review of England's Accredited museums and galleries to gain a deeper understanding of the sector, the issues it faces and how it can be best supported by government.

We would like to hear from you about the challenges and opportunities for museums and the role of government and statutory bodies.

Question 1 – Over and above core funding what do you think are the top three challenges for museums and galleries in England over the next decade and how could these be addressed?

	Challenge	How could it be addressed
1		
2		
3		

Question 2 – Over and above core funding, what do you think are the top three opportunities for museums and galleries in England over the next decade and how could these best be exploited?

	Opportunity	How could it be exploited
1		
2		
3		

Question 3 – What do you think needs to be done to ensure the financial sustainability of the museums and galleries sector in England over the next decade?

Question 4 – Please indicate how much you agree or disagree with the following statement:

“Government should fund museums and galleries”

- Agree strongly
- Agree
- Neither agree nor disagree
- Disagree
- Disagree strongly
- Don't know

Question 5 – Why do you feel this way?

Question 6 – We know a lot of excellent work is already going on throughout the museums and galleries sector in England. We would welcome examples of recent best practice in the following areas:

Examples	
a. Partnership working, including with museums, cultural, education and business sectors (1)	
b. Shared services, including storage and conservation (2)	
c. Diversifying income, including from commercial activities, fundraising and sponsorship (3)	
d. Digital including collections management, digital services and programming (4)	
e. Programming including exhibitions, education and outreach (5)	
f. Diversifying workforce and/or audiences (6)	

Question 7 – Is there anything else you would like to tell us about the wider museums and galleries sector in England and how it could be better supported by government or other statutory bodies, including ACE, HLF and Local Authorities?

Question 8 – We would like to know a bit more about the museum, gallery or sector body you work for or volunteer with. Do you represent a:

- National Museum
- Local authority run museum
- Trust run museum
- Independent museum
- University museum
- Museum membership body
- Museum funding body
- Other (please specify)

Question 9 – We would really like to know which organisation, museum or sector body you work with. Please write in below, but if you would rather respond anonymously do leave blank.

Question 10 – If you would be willing to be recontacted to discuss your responses to this survey please provide your contact details below.

Name:

Surname:

Telephone Number:

Email Address:

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