



Northern Ireland Museums Council

# **Local Museums Resources Survey**

**2013**

## Background

In 2011 NIMC conducted a Museum Resources Survey, which identified the impacts upon local museums' budgets, operations and services in the light of prevailing trends in public spending. The methodology adopted emulated that of a Museums Association survey, the findings of which were published in July 2011 as *The Impact of the Cuts on UK Museums*. This report is available at <http://www.museumsassociation.org/download?id=363804>

In July 2012 the Museums Association (MA) repeated the exercise and published an update that is available at <http://www.museumsassociation.org/download?id=770702> As well as revealing changes to the trends identified in the earlier report, it also examined what museums had done, or were planning to do, in order to survive in the tough financial climate.

During the early part of 2013 NIMC undertook a survey of local museums in Northern Ireland, gathering data on museum budgets, staffing, opening hours, charges and the services they provide. This mirrored the Council's 2011 survey. Under the various sections below the changes that have occurred during the intervening two years are identified, and these are compared with the trends identified in the MA studies.

In 2011 the survey was conducted through an online 'surveymonkey' questionnaire which elicited 32 responses from the then 38 Accredited local museums, some of which were incomplete. In 2013 the survey was circulated by e-mail, with responses being followed up either by telephone or through 'face to face' meetings, and completed returns were received from 36 of the 37 Accredited local museums, with one museum making a partial return

The local museums of Northern Ireland comprise two general types – those run by local authorities and those which are independently-run. In the MA survey, the latter were further sub-divided, segregating university and regimental museums from other 'independent' museums. This differentiation is used in the breakdown of the Northern Ireland museums below by way of allowing comparisons to be made with the MA surveys.

## Budgets

Museums were asked for details of their operating budget for the specified financial years. The percentage change in 2011 was calculated through comparison with 2010-11 budget information that had been previously provided. The 2013 percentage change was calculated through comparing the declarations given for operating budget in 2011-12 with those for 2012-13. The overall budgets and associated changes across the independently-run museums, the University and Military museums and those museums operated by local councils are tabulated below.

## Overall Budgets

The following table presents the overall operating budgets (excluding capital expenditure) declared across the local museum sector in Northern Ireland.

Local Authority			Independent		
2010-11	2011-12	2012-13	2010-11	2011-12	2012-13
£4,286,041	£4,338,477	£5,068,673	£1,891,083	£1,763,000	£3,381,232

Northern Ireland Local Museum Budgets

There is a notable difference in the 2012-13 budget figure for the Independent museums when compared with previous years. This is due to all museums of this type providing figures for the 2013 survey, while only half made an associated return in the previous surveys.

The survey indicates that the operating budgets of the Accredited local museums in Northern Ireland during 2012-13 amounted to £8,449,905.

### Changes in Operating Budgets

	Local Authority		Independent		Univ/Mil	
	2011	2013	2011	2013	2011	2013
Number of respondents	17	20	11	12	4	5
Cut	30%	25%	36%	17%	25%	0%
Same	35%	5%	36%	0%	0%	0%
Increase	35%	65%	0%	50%	0%	20%
Not known	0%	5%	28%	33%	75%	80%

#### Changes to Northern Ireland local museum budgets

The table above suggests a notable fluctuation in museum budgets, particularly for the level of increases reported. Setting aside the slight variations due to the shifts in the understanding of what was to be reported on, which are not thought to be material, there are some points of particular note:

- 65% of local authority run museums (13) saw an increase in their budget. Of these four had also seen an increase previously, 4 got an increase from a static position previously. Three had an increased budget, having had a cut the year before. However, there were two museums in this category which saw a continued reduction in their budgets over the years surveyed.
- On the surface it appears that the Independent museums are on a relatively healthy trajectory too. Four museums which had declared a flat budget previously, stated that their budget had gone up. But notably the two museums with reduced budgets in 2011-12 suffered further cuts in 2012-13.
- Amongst the University/Military organisations the museum which declared a cut in the previous survey registered an increase in 2013. The main reason why the other museums in this category are declared 'not known' is that all have their core costs paid centrally and these are not known at site level.

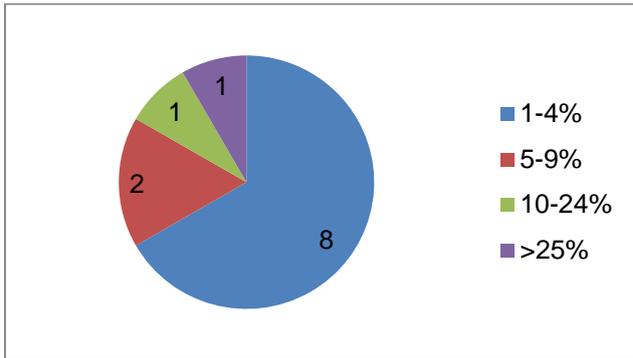
### Scale of Changes to Budgets

#### Budget Cuts

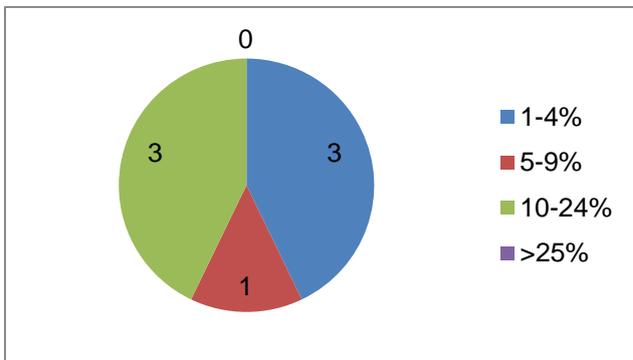
The table and charts which follow provide an indication of the level and scale of the cuts experienced by local museums during the past two years.

	Local Authority		Independent		Univ/Reg	
	2011	2013	2011	2013	2011	2013
Number of respondents	17	20	11	12	4	5
Number with budget cut	5	5	6	2	1	0

#### Scale of budget cuts in local museums



**Scale of Budget Cuts 2011**



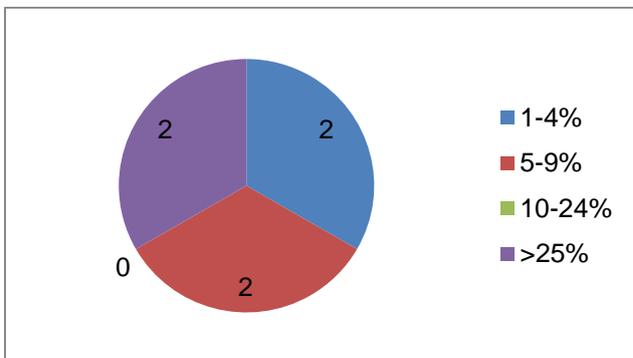
**Scale of Budget Cuts 2013**

### Budget Increases

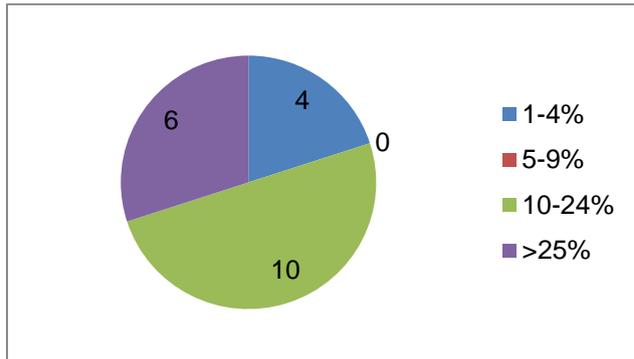
The following table and charts provide an indication of the level and scale of the increases to budgets experienced by local museums over the last two years.

	Local Authority		Independent		Univ/Reg	
	2011	2013	2011	2013	2011	2013
Number of respondents	17	20	11	12	4	5
Number with budget increase	6	13	0	6	0	1

**Scale of Budget Increases**



**Scale of Budget Increases 2011**



**Scale of Budget Increases 2013**

In terms of the rise and fall in local museums' budgets, it is evident that 2012-13 saw a reduction in the number of museums facing a budget cut. Also, that year saw an increase in those experiencing a budget increase. Additionally, the rate of cuts has diminished: in 2011-12 the highest cuts were represented by one museum having a 25% cut and one other a 15% cut, but in 2012-13 the three highest rates of cuts were 16%, 15% and 13%.

Against this, the rate of increase in budgets rose considerably. In 2012-13 three museums saw their budgets double compared with the previous year and a further 3 museums saw rises of 50% or more.

#### UK Comparison

In 2012 the Museums Association reported on the repetition of its 2010 survey of cuts in museums. This established that out of 114 museum services and individual institutions that responded, 51% reported a cut to their budgets and almost a quarter have been forced to reduce public access by closing whole sites or parts of sites permanently or temporarily. 11% have closed whole sites permanently. Also, 31% of all respondents had experienced a cut of more than a tenth to their budget, with a knock-on effect on public services.

The 2010 survey revealed that across the UK 72.5% of local authority museums experienced cuts, as did 34.1% of independent museums and 56% of the 'other' museums.

#### **Staffing**

In 2011, in response to the question – “Compared with last year, has the number of staff at your museum increased, decreased or remained the same?” – Northern Ireland's local museums responded as follows:

- 7 of the 32 museums (22%) had reduced their full-time staff
- 18 (56%) had not seen a change in the level of full-time staff employed
- 5 (16%) had increased their full-time staff
- 10 (31%) had increased their use of volunteers.
- 6 museums (19%) had increased their numbers of trainees
- 6 (19%) had increased their numbers of work placements.

The returns from the 2013 survey indicated that,

- While 8 (22%) museums had decreased their complement of full-time staff, 15 (41%) had increased the number of full-time staff. Overall the number of full-time staff in the local museum sector rose from 136 (2011) to 157.5(2013)
- 8 (22%) museums increased their part-time staff and 2 (5%) decreased such staff

- 9 (24%) museums increased their temp/casual staff and 8 (22%) decreased such staff
- 16 (31%) had increased their use of volunteers and 10 (27%) had decreased the number of volunteers. However the latest declarations indicate a marked increase in the number of volunteers at local museums, rising from 315 to 770 over the two years.
- No clear picture emerges on the underlying trends in relation to work placements and trainees due to the operation of a year-long HLF funded bursary and work placement programme which NIMC operated during the period under report. This saw 12 placements at local museums over the last two years and it is unclear if museums have incorporated these within their return on 'work placements' or 'trainees'.

### UK Comparison

The latest MA survey on the impact of the cuts pointed to reduced staffing levels, with 42% of respondents reports a cut in FTE staff, with a quarter of respondents seeing a cut of more than 105 in staffing levels. 47% of museums saw no change and 11% reported an increase in staffing.

39% of museums surveyed reported a larger proportion of volunteers in the workforce when compared with 2011

## **Service Provision**

### **Opening Hours**

One way in which museums respond to a reduced budget is to cut costs through reducing the time the museum is open. The NIMC surveys asked museums if their opening hours had, when compared with the previous year, increased, decreased or remained the same. The results were as follows.

	<b>Local Authority</b>		<b>Independent</b>		<b>Univ/Mil</b>	
	<b>2011</b>	<b>2013</b>	<b>2011</b>	<b>2013</b>	<b>2011</b>	<b>2013</b>
<b>Number of respondents</b>	17	20	11	12	4	5
<b>Decreased opening hours</b>	3	6	1	2	0	1
<b>No change to opening hours</b>	12	12	4	7	1	3
<b>Increased opening hours</b>	2	2	6	3	3	2

**Changes to opening hours at Northern Ireland local museums**

When set against the budget information provided;

- 1 museum stated that it operated the same opening hours having seen no change in its budget over the period.
- Of the 20 museums that declared an increased budget in 2013, two increased their opening hours, 13 operated the same hours and 5 decreased their opening hours.

- And of the six museums with reduced budgets in 2013, two operated the same opening hours, two decreased their hours and two increased the time that they were open.

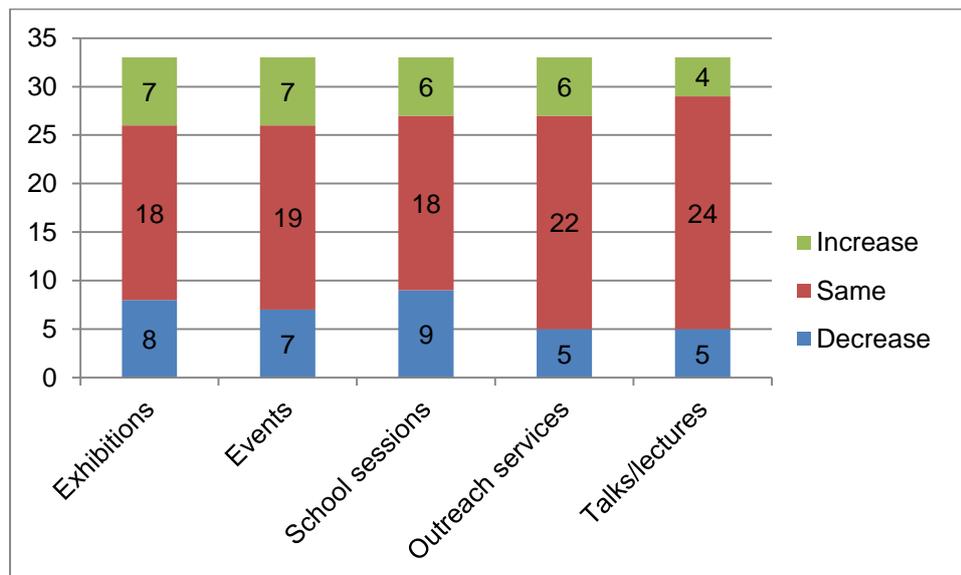
Upon further investigation the changes in the opening hours appear to be related to strategic changes in service provision rather than being directly related to budgets. For instance, of the two museums with a reduced budget and reduced opening hours, one museum closed as part of a restructuring programme, with the budget reduction being of the order of 1%, and the other had previously declared increased opening hours and thus reduction brought it back to its previous position.

### UK Comparison

Budget cuts and the knock on effect on service provision saw 18% of respondents to the Museum Association survey reporting that they had reduced their opening hours, and of this group 52% were reducing their hours by at least 11 hours a week.

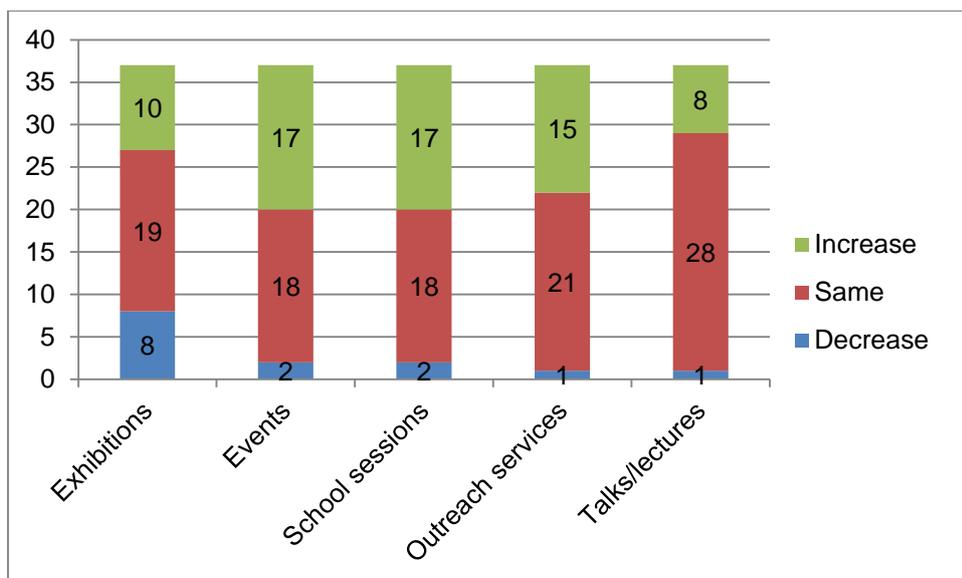
### **Changes in Services**

The capacity to deliver the principle services is obviously related directly to the resources available. Local museums were asked if their services had increased, decreased or remained the same, when compared with the previous year. The results in 2011 were:



**Changes to Services at Northern Ireland local museums (2011)**

When the same question was asked in 2013 the responses indicated some significant changes, as indicated by the following chart.



**Changes to Services at Northern Ireland local museums (2013)**

From these charts it is evident that, over the review period, there has been a marked reduction in the number of museums scaling back on service delivery and activities amongst Northern Ireland's local museums, and that more museums declared that they had increased their services delivery. Such increases are particularly noticeable in relation to events, education and outreach.

Amongst the six museums stating that their budget had been reduced, all stated that they had increased the number of events and enhanced their schools programmes. Two indicated that their exhibition programme was unchanged, while one increased its exhibition programme and two reduced it.

A similar mixed picture emerges when the services of 20 museums with budget increases are considered:

- Two stated that they were decreasing their exhibition programmes, one because the museum would be closed for refurbishment, with three museums declaring they would be increasing the level of exhibitions.
- Nine museums indicated that they would be delivering more events, with no museums cutting back on this type of service
- 6 will do more schools activity, while one museum was planning to reduce such educational work
- Outreach work was set to increase at nine museums and decrease at one
- And talks/lecture would increase at four museums and decrease at one.

### UK Comparison

The Museum Association identified that the cuts to budgets and staffing have had an impact on the public facing services that museums are able to offer, with the data showing that 22% of museums have had to close a part of their site either temporarily or permanently. Some 52% of the museums participating in its survey were planning to reduce their opening hours by more than 11 hours a week.

The MA survey states that, "Although some museums are reducing services, the outlook is more positive when looking at the data for events and the introduction of admission charges. 71% of respondents are either maintaining or increasing the number of events and activities that they are offering to the public.

## Museum Charges

The Museum Mapping 2012 survey found that there has been no change since 2006 in either the proportion of museums (58%) operating free admission, or in the profile of the local museums that do and do not charge an admission fee. Three out of the 20 local authority museums charge an admission fee. Ten of the 17 independent museums charge an admission fee.

In 2013 only one local authority-run museum indicated that it had reduced its charges, when compared with the previous year. Over the same period four independent museums had increased their charges, with the remaining 32 museums indicating no change.

## UK Comparison

There is no direct comparator concerning museum charges within the Museum Association's July 2012 report, although of the 51% of museums the MA surveyed which had seen a budget cut, 38% had introduced or increased charges for school visits to their sites, with this percentage increasing to 49% amongst museums with budget cuts of more than 10%.

There is a distinct emphasis amongst respondents to this survey upon saving money, finding alternative revenue streams and generating income, with resources being diverted from collections and programming to enable this trend.

## Visitor Numbers

The Northern Ireland Museums Council has collected and collated the numbers of visitors attending local museums on an annual basis for nearly 20 years. Only local museums recognised under the Museum Accreditation Scheme are included in this survey, and while the number of such museums has increased the underlying trend has been a continual increase in visitor numbers. This trend has been sustained over the last two, as demonstrated by the following table.

Museum	2011	2012
Andrew Jackson and US Rangers	1,088	1,379
Armagh Public Library	4,400	5,924
Ballycastle Museum	3,037	3,046
Ballymoney Museum	12,824	14,639
Carrickfergus Museum	18,866	11,803
Coleraine Museum	2,210	2,953
Craigavon Museum Service - Waterside House	10,226	14,635
Craigavon Museum Service - Barn Museum	4,500	3,198
Derry - Tower Museum	24,620	20,900
Derry - Harbour Museum	4,835	closed
Down County Museum	33,219	31,331
Downpatrick & County Down Railway	10,000	9,033
F.E. McWilliam Gallery & Studio	40,559	50,612
Fermanagh County Museum	26,498	31,981
Flame - the Gasworks Museum of Ireland	1,969	1,421
Green Lane Museum	6,874	8,006

Inniskillings Museum	as Fermanagh (joint ticketing)	as Fermanagh (joint ticketing)
Larne Museum	5,048	4,247
Lisburn Museum	47,347	44,439
Mid-Antrim Museum	27,990	30,457
National Trust - Ardress	7,000	6,126
National Trust - Argory	37,500	38,290
National Trust - Castle Ward	15,740	38,000
National Trust - Florence Court	36,000	35,865
National Trust - Hezlett House	3,500	4,000
National Trust - Mount Stewart	27,567	29,000
National Trust - Springhill House	22,761	18,807
Naughton Gallery at Queen's	21,065	12,000
Newry and Mourne Museum	35,443	34,719
North Down Museum	54,177	69,148
Police Museum	2,412	1,868
Railway Preservation Society	9,500	To be declared
Royal Irish Fusiliers Museum	10,504	10,847
Royal Ulster Rifles	1,500	3,126
Sentry Hill	6,040	6,500
Somme Heritage Centre	31,000	30,823
Strabane Museum Service	400	270
<b>Total</b>	<b>608,219</b>	<b>629,393</b>

## Prevailing Trends

From the information provided by the local museums through the 2013 survey, it is obvious that this sector is not experiencing anything like the same economic stringency evident in other parts of the UK, especially England, either in terms of the degree of budget cuts or the timeframe in which these are being implemented. Indeed, with many museums declaring budget increases and the trend towards expanding programmes, the Northern Ireland picture is health by contrast.

The changes in how staff are contracted could be interpreted as a sign that museums' governing bodies are mindful of a need to seek further operating efficiencies and are seeking the flexibility to achieve savings. However any such trend is not mirrored in the movements in the operating budgets. Similarly, the changes in the opening hours at the local museums seem to have a strategic, rather than a budgetary, imperative. The scale of variation in opening hours is not thought to be material to the increase in visitor numbers registered across the sector over the last two years. Indeed the 'mixed' picture so far as Northern Ireland's local museums is concerned, throws up a number of anomalies. For instance, of the 8 museums with reduced full-time staff, none declared a cut in their budgets over the period. Indeed 5 of these museums declared budget increases. And of the four museums with the largest budget cuts, none indicated a reduction in their full-time or part-time staffing complement.

There has been a significant upward shift in budgets for both the local authority and independent museums. The latter has such an order of increase that further verifications may be necessary prior to monitoring the 2013-14 budgets in due course. Given the fluctuations in the declared operating budgets it is difficult to identify an underlying trend

save to say that the sector is not experiencing the downturn evident elsewhere, as recorded by the Museums Association.

While the trends revealed by the Museums Association studies are not being replicated in Northern Ireland, there are signs and developments that may, in all likelihood, have a detrimental influence upon the level of public funding going to local museums. The budget of the Department of Culture, Arts and Leisure has gone down in recent years, the knock on effect being felt mainly by the National Museums Northern Ireland, with NIMC having to operate with a significant reduction in the money available to local museums through its grant programmes. But such grant funding was always project orientated, rather than forming any notable level of the core operating costs of any local museum.

The number of people working in Northern Ireland's local museums continues to grow, with museums pointing to a 16% rise in the number of full-time staff in the last two years. However, of particular note is the significant rise in the number of volunteers, with respondents suggesting that there is now more than double the number of volunteers when compared to two years ago. While mirroring a trend identified elsewhere, the scale of the rise is remarkable.

When it comes to services and charges a mixed picture emerges in Northern Ireland. There appears little correlation between declared budget cuts and any proportional reductions in either staff or services. Indeed the underlying aspiration is for local museums to do more. Similarly, few museums have or are planning to increase their charges to visitors and users. Nevertheless there are certain things on the horizon which will undoubtedly affect all local museums, not just those operated by local councils, including the forthcoming Comprehensive Spending Review and the immanent changes in local government administration. In view of the potential impact of such changes, it is important that the trends identified in this report continue to be monitored and that the emerging lessons on how museums elsewhere have dealt with budget cuts are noted and any downturn prepared for.