Museums and Galleries in Britain

Economic, social and creative impacts

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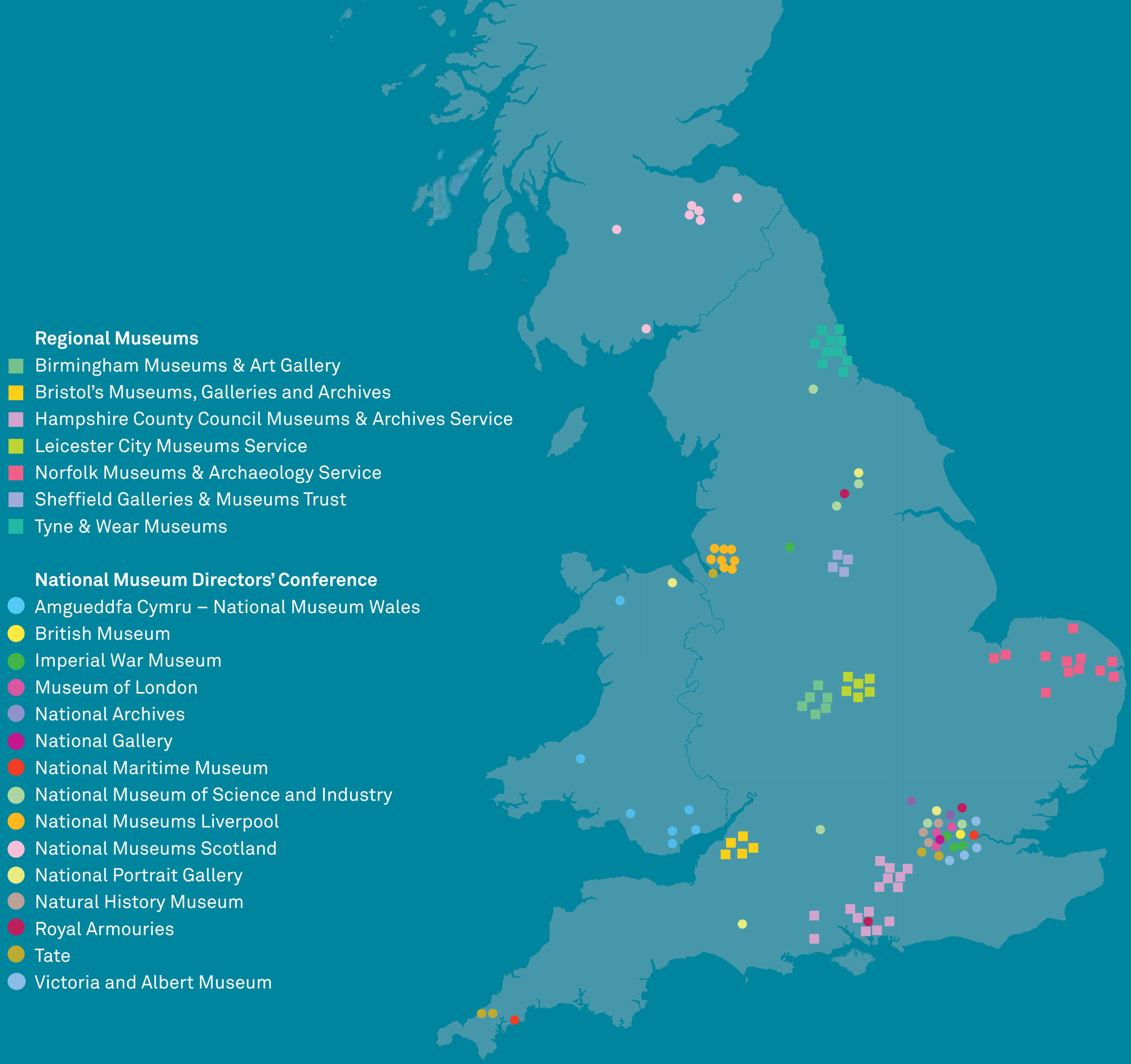
Participating Institutions

The institutions considered in this study include the larger museums and galleries funded by the Department for Culture, Media and Sport, a number of equivalent institutions in Scotland and Wales and a group of larger regional museums. The participants include members of the National Museum Directors' Conference and lead partner museums in the Renaissance in the Regions programme. Their inclusion is determined by such factors as the scale of their budgets and visitor numbers. Availability of data was also a criterion. Between them, these institutions operate 118 venues. A full list of sites can be find on the inside back cover.

Full details about the Renaissance in the Regions programme can be found at www.mla.gov.uk

More information about NMDC can be found at www.nationalmuseums.org.uk



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The statistics published in this report have been collected from a questionnaire of a number of major museums and galleries (both DCMS and local authority funded) in Britain. The 'population' of institutions is intended to include most of the country's leading institutions and museum services and brings together a family of bodies that are not always treated as homogeneous. Data have been collected and then cross-checked with institutions. However, there are always issues of interpretation and definition in an exercise of this kind. Data are collected for different purposes. The threat of double-counting is always present, particularly with potentially overlapping measures such as 'donations' and some kinds of 'grants'. There are also problems associated with 'net' and 'gross' expenditure or income measures.

Thus, the numbers here presented should be seen as a best effort to create a single population of institutions that, collectively, represent about two-thirds of all museum and gallery expenditure/income in the UK. This sub-sector of the creative industries is one of the world's largest and deserves attention because of its continuing potential to assist in building Britain's post-industrial economy. Many countries can build consumer 'white goods'. But few have the kind of extensive cultural sub-sector shown in the tables in this report.

Figures are given, wherever possible, for each of the institutions covered by the survey. A blank space generally indicates a lack of data. In some cases, the institution did not exist in its current form for all years. Sub-totals and totals are shown in *italics* so as to remind the reader that not all totals are consistent because not all data cells are filled for every year. Nevertheless, the total of each column of data is provided.

Future exercises of this kind will need to address the problem that official statistics within the cultural and creative industries remain less well developed than in, say, manufacturing. Only the government can command the authority and consistency necessary to create a fully robust set of statistics about museums, galleries and other cultural institutions.

Right: Tate Britain Sure Start – Casting the nets and fishing, exploring Christopher Wood and Alfred Wallis

1 INTRODUCTION AND SUMMARY OF FINDINGS

This report has been commissioned by the Museums, Libraries and Archives Council (MLA) and the National Museums Directors' Conference (NMDC) to provide an up-to-date analysis of a number of economic and social impacts of many of Britain's major museums and galleries. There has been a growing recognition in recent years that these institutions play leading roles in encouraging civic development and economic regeneration within society. The Renaissance in the Regions policy, in particular, has made it possible for key regional museums to develop leadership and a voice for the major local government institutions. Recently developed leadership and wider functions are in addition to the traditional ones ascribed to museums and galleries over many years.

It is clear, however, that as additional functions and expectations have been required of regional and national museums and galleries, it has not always been possible to provide sufficient additional resources to match new responsibilities. This report examines a number of the wider functions of museums and galleries and the ways these are delivered.

The institutions considered in this study include the larger museums and galleries funded by the Department for Culture, Media and Sport (DCMS), a number of equivalent institutions in Scotland and Wales and a group of larger regional museums. They represent a sub-set of the wider population of British museums and galleries. Their inclusion is determined by such factors as the scale of their budgets and visitor numbers. Availability of data was also a criterion.

It is, perhaps inevitably, important to begin with a note of caution. A number of reports have in recent years been devoted to the question of data sources for culture and the arts, and the use to which they are put. There is no, single, consistent data source for British museums and galleries, still less for the wider arts and cultural sector. The reasons for this omission are often considered. Such reasons include the following: (a) the fragmented and disparate nature of such institutions; (b) the relative novelty of considering cultural activity (as opposed to, say, agriculture or manufacturing) as an economic sector in its own right; and (c) the lack of a single statistical institution devoted to the sector in the way that, say, the Higher Education Statistics Agency collects numbers about universities. The MLA has been the institution that has, more than any other, sought to bring consistency and rationality to this issue.

The numbers used here have been collected in a questionnaire sent out specifically for this exercise. They cover a number of major museums and galleries funded by the DCMS, the Scottish Executive, the Welsh Assembly Government and by local authorities. Between them, they represent a significant proportion of such activity in Britain, though there is no precise definitional 'edge' between those in and those outside of the study. A willingness to take part and complete the questionnaire was an important qualification. There are no better or more comprehensive data sets, though there is always a risk of a slight lack of comparability, given the differences between institutions surveyed. There are also minor difficulties associated with changes in definition from year to year. However, the general order of magnitude of the statistics and observations based upon them are robust.

Above: National Museums Liverpool – Stories behind the art at the Walker Art Gallery

The key findings of this report are as follows:

General importance of the sub-sector

- Britain's museum and gallery sub-sector consists of institutions that are among the very best in the world. The agglomeration of institutions, talent and audiences in Britain has parallels in only a few other countries. This concentration provides a major opportunity, deriving from the rapidly changing nature of the British economy. This country, along with other highly developed economies will face continuing demands for economic flexibility and creativity in the years ahead.

- Museums and galleries offer a major internationally traded service (by generating exports) while also underpinning the creativity upon which future high value added economic activity is likely to be based. Thus, the sub-sector will help in the development of new services, products and even manufactured goods. States without such collections and centres of knowledge will find life more difficult.

Economic impacts

- Economic benefits of the sub-sector are estimated to be of the order of £1.5 billion per annum, taking account of turnover and plausible estimates of visitor expenditure. Wider economic impacts would be still greater;

- Over 9,000 people are directly employed by major museums and galleries considered by this study;

- National and regional institutions are directly contributing to programmes that assist economic development and the strengthening of social capital;

Creative and cultural impacts

- Britain's major museums and galleries are a key element in the mass communication of culture, creativity and ideas;
- There are over 42 million visits each year to major museums and galleries. According to the initial results of the DCMS Taking Part survey, 43 per cent of the population attended a museum or gallery at least once during the past year. This number is supported by those revealed by the MLA/NMDC questionnaire;
- The scale of attendance at museums and galleries is not a one-off, this level of participation has been sustained over a number of years. It is clear the sub-sector is a long-term contributor to national well-being;

Civil society

- Museums and galleries are playing roles in thousands of local, national and international civil society institutions, providing a bridge between, on the one hand, history and scholarship and, on the other, the future, creativity, leisure and social cohesion;
- Our survey suggested there were 3,000 'volunteers' and over 140,000 'friends' linked to the museums included in this study – a major contribution towards civic engagement;

Education and social impacts

- Museums and galleries have expanded their activities as partners with universities and further education, as well as extending access to schools and increasing the numbers of visits by young people;

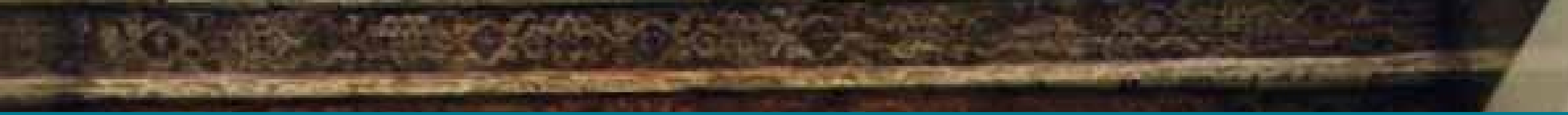
Finance

- Self-generated income to museums and galleries in this study has ranged as high as £200 million a year, including over £100 million in donations and sponsorship, over £100 million in trading income and some £20 million in ticket sales;
- Up to a third of museum displays and facilities are in need of significant renovation;
- Income has not been rising as fast as staff and other inflationary costs in the economy;
- Without proper resources it is unlikely that the complex objectives now set for museums and galleries can continue to be delivered – additional income sources will be required;

Governance and accountability

- There are conflicting demands on institutions, which must act as traditional centres of scholarship and curatorial expertise, but also as teaching institutions, mass entertainments and, increasingly, moderators of scientific knowledge and agents for social change;
- Museums and galleries face many demands for accountability, not only to central or local government (as a major source of funding) but also to local communities and business. Incentives may not always be consistent.

Right: National Museum of Scotland



2 | ANALYSING THE IMPACTS OF MUSEUMS AND GALLERIES

Cultural and creative institutions, including museums and galleries, have found themselves under a number of accountability pressures in recent years. Such pressures have a number of origins, including: government demands for 'delivery', changing public attitudes to institutions and fashion in the measurement of outcomes. This report considers a number of Britain's leading museums and galleries in terms of their capacity to attract visitors, economic impacts, civic functions, contributions to the country's creativity and educational performance. This approach is explicitly designed to address a number of possible official interests in what these institutions deliver.

Museums and galleries are an important and recognised element in the British cultural economy. A number of studies have demonstrated the different impacts these institutions have on local, regional and national economies. Early studies considered the economic impact of cultural institutions. The evolution of 'economic regeneration' policies, particularly in larger cities, led to studies of the impacts of museums, galleries and other cultural bodies on post-industrial urban economies. Such studies considered both 'hard' and 'soft' indicators, with the latter set of measures designed to test the impact of institutions on social cohesion.

More recently, parts of the cultural sector have moved on to different kinds of research, notably studies designed to estimate the value people put on local heritage, museums, libraries and arts. The BBC, as part of its charter revision process, commissioned a major project to estimate the value people put on its output. This study sought, amongst other things, to measure how much people would be willing to pay for the BBC if, instead of paying through the licence fee, they were asked to subscribe for the same programmes. English Heritage and others, including DCMS, has supported a broadly similar piece of research to attribute a monetary value to aspects of the nation's heritage (Eftec, 2005).

A wider study of 'public value' approaches is currently under way at the Work Foundation (Work Foundation, 2005). This study seeks to draw together both the 'economic' efforts to assess public value (generally using techniques to attribute a monetary value to the importance people attach to cultural activities or institutions) and the more qualitative version of the concept. The Secretary of State for Culture, Media and Sport has publicly stated her interest in the techniques used by academics such as Mark Moore (Moore, 1997).

Recently, the National Trust published a document entitled *Demonstrating the Public Value of Heritage*, which provides a further step in the search for a 'public value approach' to the measurement of heritage (National Trust, 2006). The output of the research is intended to examine "the value organisations deliver from the perspective of the citizen, and how cost effectively this value has been delivered".

The report argues that traditional approaches to performance measurement have a number of limitations. First, there is insufficient focus on citizens and their requirements. Second, the focus is on outputs not outcomes and, third, there is a failure to reconcile outcomes and cost-effectiveness.

The National Trust (NT), working with Accenture, came up with a method for measuring public value that attributed weights to a number of standard indicators. These indicators included a number of inputs, such as 'total visitor numbers', but also outputs, eg, economic impact and also qualitative measures, eg, ratings given by visitors. The measures and weightings were selected judgementally on this occasion. The different indicators and weights were then brought together into a single measure for each of the NT properties being considered.

The NT/Accenture research is very much a first attempt at this kind of public value measure. It is not dissimilar to measures such as the local government 'Comprehensive Performance Assessment' which brings together a number of performance indicators and qualitative measures into a single measurement. It is clear that a number of different methods of measuring 'public value' are evolving separately and, on present form, each will be hard to compare with the others. There may be good arguments for museums and galleries themselves exploring a number of these new techniques, though until the Treasury, DCMS, or some other institution provides an agreed and comparable framework within which to make measurements, the risk of a series of one-off studies of 'public value' persists.

International comparisons of the scale and arrangements for funding cultural institutions can also be instructive. The amounts spent by governments and mechanisms for allocating culture support vary widely from country to country. By comparing numbers of visits to museums and galleries in Britain with those in other developed democracies, it is possible to benchmark performance in this country with what takes place elsewhere.

educational, civic and social aspects of the country's performance. For the first time, major national and regional institutions are considered in the same report. By bringing together data about key museums and galleries from a number of major cities in the country, it has been possible to assess the collective impact of the sub-sector in the light of cross-party policy objectives relating to objectives such as the revival of urban centres, reductions in social and educational inequalities, and the strengthening of regional economies.

The Chancellor commissioned Sir George Cox to review how Britain could better exploit its creative skills more effectively (Cox, 2005). His report made a number of recommendations, many of them aimed at universities and/or the smaller and medium enterprise sector. However, it also suggested there needed to be a more effective showcase for British creative talent, around a centre that would include exhibition space, seminar facilities, a hub for creative industry gatherings, educational facilities, space for professional and trade bodies, retail facilities and incubator space for creative businesses.

The role of museums and galleries... in promoting and encouraging creativity should not be overlooked.

The different approaches adopted to describing and measuring cultural institutions are evidence of a desire within a rapidly-developing sector of the economy to understand itself and its impacts. In part, such research allows museums, galleries and other cultural bodies to be held to account for the public resources they have already received. In part, it makes it possible for central and local government to decide where future resources would best be applied. Cultural institutions are, after all, in competition for both public resources and for individuals' leisure expenditure.

This study analyses the impacts of Britain's larger museums and galleries on a number of economic,

The Design Museum in London, along with the Lighthouse in Scotland and the Northern Design Centre, were cited as good examples of the kind of initiative to be fostered more widely. Interestingly, the Cox Report included a picture of Tate Modern at the point of the report dealing with the proposals for showcase centres. The role of museums and galleries (many of which already have most of the facilities required for Sir George's 'creative hub') in promoting and encouraging creativity should not be overlooked, particularly in the light of international competition. Many good examples of such activity are provided later in this report.

The DCMS Creative Economy Programme is intended to be "the first step in achieving our [ie the government's] goal of making the UK the world's creative hub". An Evidence and Analysis group has been set up to consider questions such as: "How much of the UK economy do creative industries currently account for? What is their indirect impact on other industries?" The research will also consider how "good product design can differentiate it from other products and add real value" and " What role will these industries play in the future of the UK economy? Will they become more or less important?" This report attempts to answer these, and other, questions.

Museums and galleries contribute to the delivery of a number of policy objectives determined by government. It is reasonable that central and local government expect the achievement of such objectives because a significant proportion of most institutions' income comes from the State. It is also possible, of course, that short-term changes in policy may detract from the longer term purposes of cultural institutions. On the other hand, the public might be less likely to support the arts and culture if there were felt to be a lack of public accountability for taxpayers' money. There is a delicate balance to be struck.

The contents of this report make clear that Britain's museums and galleries have been increasingly successful in achieving a number of outcomes desired by government. Increasing overall attendances (over time) and the observation that 43 per cent of all adults visit a museum or gallery at least once a year (DCMS, 2006) suggests the sector has become a major element in the delivery of an improved quality of life. New museums and galleries have contributed to the economic and social regeneration of industrial cities. Research such as a recent study of Bolton's museum, library and archive services (Jura Consultants, 2005) suggests the public assign greater value to such services than they actually cost.

Above: Young visitors on an 'Action Station' in the main exhibition space at Imperial War Museum North

The increasing number of children and people from diverse backgrounds attracted to museums and galleries also implies that the government's inclusion objectives are being achieved. The inspiration achieved by visits to cultural institutions can be shown to result in value-added benefits for those individuals and society more generally. Section 4 and the case studies in this report give examples of the ways in which museums and galleries can reach out to individuals and also inspire intellectual capacity-building between individuals and the wider economy. Such capacity-building will improve employability and self-confidence.

The inspiration achieved by visits to cultural institutions can be shown to result in value-added benefits for those individuals and society.

The impact of museums and galleries on the wider economy can be measured both as the direct and indirect economic impacts considered in Section 3, but also as the creation of wider productive capacity of the kind the Chancellor wished to encourage by the setting-up of the Cox inquiry discussed above. Museums and galleries have delivered 'soft diplomacy' (by subtly promoting Britain overseas and to foreign visitors) as well as providing the domestic economy with creative input.

As Britain, along with other developed economies, moves further and further away from primary manufacturing and the delivery of low value-added services, the country's key cultural and 'weightless' assets will become more important. Few countries have such a good starting-point for this new economy as Britain. Moreover, because of the country's size, institutions are accessible to most of the population.

There are other aspects of museums and galleries that may, in future, be thought to be important. The capacity of cultural institutions to provide people with opportunities to develop in ways that enhance their happiness – a key government concern – is not yet researched. However, there is no doubt that museums and galleries can also be ordered and tranquil places in contrast to many of the more challenging aspects of modern society, contributing to the achievement of happiness and other desirable ends.

Above: A visitor admiring a painting at the National War Museum, Scotland

3 MAJOR MUSEUMS AND GALLERIES IN THIS STUDY: A STATISTICAL ANALYSIS

Britain's major museums and galleries constitute a major sub-sector of the country's cultural industries. This report estimates that the annual turnover of the whole sector – including all museums and galleries, from the largest national institutions to the smallest local ones – will exceed £900 million.

If even very modest assumptions are made about the related economic activity (international visitors, regeneration expenditure and so on) are added to this total, the figure would exceed £1 billion. This suggests that broadly £1 in every £1,000 in the UK economy can be directly related to the museums and galleries sector.

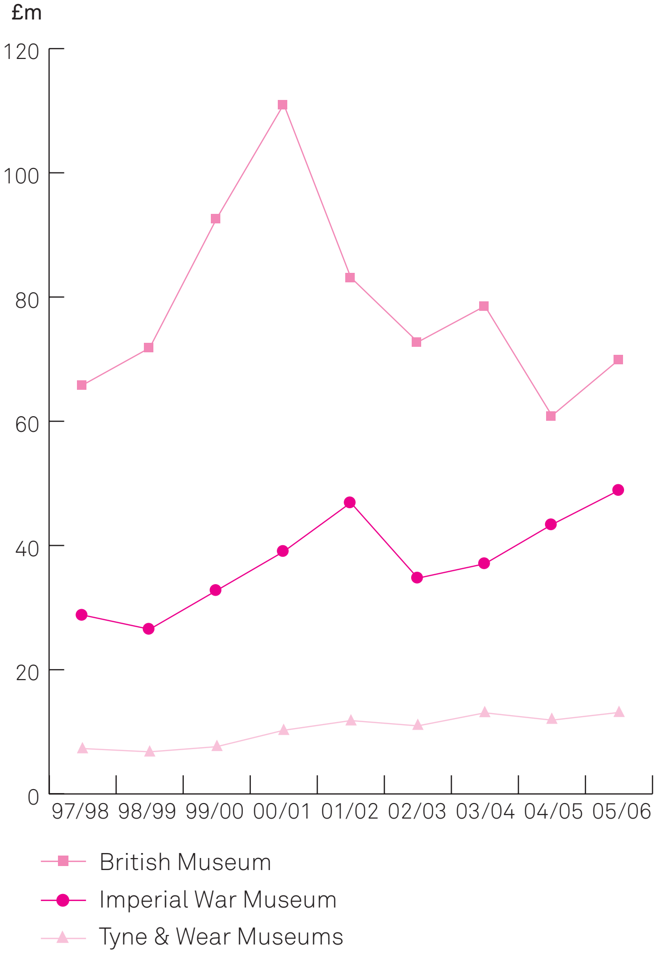
Although this is a relatively simplistic indicator, it gives a sense of the importance of the museums and galleries sub-sector to the wider economy. This section of the report is based on data provided in a major questionnaire-based exercise to assess the turnover, income sources and activities of Britain's larger museums and galleries. The purpose of the tables and numbers referred to here is to provide a data-rich picture of the sub-sector and its activities.

Expenditure – overall and operating

Public expenditure in the UK has risen by 51 per cent (in cash) since 2000-01 (HM Treasury, 2006). Over the same period, expenditure by national museums has increased by 12 per cent. The major museums and galleries covered by this report spend over £650 million a year. Individual institutions spend as much as £91 million (Tate, 2005-06), while several museums spend in excess of £50 million a year. Not all of the larger bodies are in London. For example, National Museums Liverpool has an annual budget of almost £30 million, while the museum services in Tyne & Wear and Sheffield Museums & Galleries Trust both spent £12 to £13 million in 2005-6. In each case, the institution is responsible for a significant input into the local economy. Table 1 shows the pattern of spending from body to body.

Looking at three major institutions for the full time series, it is possible to observe the movement of spending over almost a decade. The pattern of activity at any particular institution is prone to short-term movements as the result of one-off expenditure items. The overall increases in expenditure over the nine-year period range from under seven per cent at the British Museum to over 100 per cent at the Imperial War Museum (not adjusted for inflation).

Total expenditure by selected museums and galleries, 1997-98 to 2005-06 (£m)



Note: These figures have not been adjusted for inflation

Left: SEARCH, Gosport

Table 1: Total expenditure

Institutions	Expenditure								
	Total expenditure (£000s)								
	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06
Birmingham Museums & Art Gallery		7,152	6,310	9,121	11,349	9,422	10,039	12,285	10,964
Bristol's Museums, Galleries & Archives	2,301	2,254	2,242	2,301	2,199	2,737	3,691	4,111	5,999
Hampshire County Council					4,633	4,162	4,592	4,141	4,288
Leicester City Museums Service		2,303	2,405	2,050	2,327	2,529	2,581	4,324	4,930
Norfolk Museums & Archaeology Service			7,560	12,290	4,441	9,545	6,639	9,072	5,909
Sheffield Galleries & Museums Trust		1,740	1,900	2,417	3,224	3,252	6,321	8,492	13,067
Tyne & Wear Museums	7,309	6,785	7,606	10,250	11,811	10,963	13,057	11,876	13,123
Subtotal – regional museums	**9,610**	**20,234**	**28,022**	**38,430**	**39,985**	**42,609**	**46,919**	**54,301**	**58,280**
National Archives	24,871	20,226	22,617	24,016	27,305	31,197	37,872	33,401	36,933
National Museums of Scotland	27,969	39,119	17,877	18,190	16,367	17,880	19,557	23,979	25,812
Amgueddfa Cymru	14,931	18,310	16,798	17,288	18,725	18,254	20,472	22,675	24,689
British Museum	65,834	71,807	92,653	111,032	83,150	72,754	78,544	60,900	69,916
Imperial War Museum	23,806	26,507	32,757	39,030	46,893	34,743	37,062	43,368	48,879
Museum of London	14,225	15,123	15,512	19,247	20,284	19,681	21,622	19,937	18,127
National Gallery	35,924	22,239	44,576	32,768	31,343	27,189	64,999	42,902	32,732
National Maritime Museum	19,800	24,100	16,200	15,700	17,500	21,100	21,600	23,117	27,953
National Museum of Science & Industry	53,449	57,094	60,111	55,610	147,713	60,756	74,030	66,705	55,894
National Museums Liverpool	15,702	18,000	23,606	30,953	25,934	26,921	23,310	29,326	29,598
National Portrait Gallery	9,700	12,100	16,800	10,900	9,500	12,200	11,800	10,462	11,693
Natural History Museum	44,951	46,344	57,588	52,395	48,711	54,323	51,951	56,706	70,640
Royal Armouries	6,600	4,500	6,450	6,570	7,360	7,480	7,480	8,510	9,277
Tate	58,748	97,605	98,524	69,988	73,816	81,718	81,159	78,171	91,466
Victoria and Albert Museum	42,825	45,580	49,120	52,699	65,721	61,921	65,850	65,785	66,924
Subtotal – national museums	**459,335**	**518,654**	**571,189**	**556,386**	**640,322**	**548,117**	**617,308**	**585,944**	**620,532**
TOTAL	**468,945**	**538,888**	**599,211**	**594,816**	**680,307**	**590,727**	**664,227**	**640,245**	**678,812**

Figures relate to data in published statutory accounts or other financial statements, excluding depreciation

The economic importance of an individual institution to the local economy has been estimated in a number of studies. Benefits are felt by shops, hotels and restaurants in the immediate vicinity of the museum or gallery and also by the communities where the employees of these institutions live and the local businesses which provide many support services. It is not just the central cities that benefit from the economic activity generated by museums and galleries.

The expenditure figures shown are partly funded by grant, but also by income from trading (eg, shops and restaurants) and from ticket sales. There are, of course, year-to-year variations because of one-off items such as major exhibitions or a significant period of lottery-funded investment. But there is nevertheless evidence of turnover increases that match or exceed inflation, suggesting that these institutions are, collectively, holding their own in the increasingly competitive leisure sector.

Expenditure – capital

Capital expenditure has dropped sharply (as a proportion of total expenditure) since 2001-02. Table 3 shows capital expenditure in each institution. The variations here, predictably, are very wide. By its nature, capital investment will not be consistent from year to year. In Britain, with its traditionally boom-and-bust approach to public expenditure, institutions such as museums and galleries have faced years of feast and famine. The arrival of the lottery and the potential availability of funding for cultural institutions have meant that, during the period covered by Table 3, there have been very big differences in the expenditure of individual museums and galleries. Some of these investments have been widely publicised.

Thus, for example, Tate is shown as having a capital expenditure figure of some £60 million a year in 1998-99 and 1999-2000, at the key point in the development of Tate Modern. Similarly, the British Museum, National Museums Scotland and the National Museum of Science and Industry have had years with substantial levels of capital investment, notably in the years from 1997-98 to 2001-02. Local authority museum services have enjoyed their own, albeit smaller, levels of capital spending. The peak for these latter investments came a little later than in the national institutions, perhaps reflecting real terms increases in council expenditure after 2000.

DCMS sponsored institutions have witnessed a falling total of capital expenditure and an increased reliance on government support (see Table 7b). Earlier sources, such as the lottery, have declined and consequently capital grant-in-aid has increased as a share of the total. The impact has been less marked in other institutions, partly

> It is hard to envisage these institutions being able to invest to expand unless there is some recognition of the competitive pressures that all museums and galleries face at regional and international levels.

Unlike leisure institutions in the private sector, national museums and galleries cannot invest in their stock or assets unless the government allows them to. Local authority institutions are also subject to central controls over local government capital expenditure. Thus, looking ahead, it is hard to envisage these institutions being able to invest to expand unless there is some recognition of the competitive pressures that all museums and galleries face at regional and international levels. This is a key issue for DCMS, for a number of local authorities and for the lottery institutions.

Table 2 looks at Operating Expenditure only. Capital and other one-off items are excluded. Generally, operating expenditure represents some 75 per cent of turnover, though there are variations.

Table 2: Operating expenditure

Institutions	Expenditure Operating (£000s)								
	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06
Birmingham Museums & Art Gallery		6,600	5,991	7,312	7,776	8,431	8,973	9,244	9,389
Bristol's Museums, Galleries & Archives	2,301	2,254	2,242	2,290	1,746	2,718	3,672	4,028	4,601
Hampshire County Council					4,402	4,083	4,516	4,043	4,203
Leicester City Museums Service		2,218	2,339	1,992	2,249	2,451	2,561	2,753	3,052
Norfolk Museums & Archaeology Service			3,287	3,419	4,169	4,437	4,676	6,901	5,171
Sheffield Galleries & Museums Trust		1,706	1,519	2,197	3,049	3,225	3,620	3,800	5,076
Tyne & Wear Museums	6,139	6,088	6,309	6,994	7,657	8,006	9,214	10,710	12,221
Subtotal – regional museums	**8,440**	**18,866**	**21,688**	**24,203**	**31,048**	**33,351**	**37,233**	**41,479**	**43,712**
National Archives	24,017	19,069	20,963	22,806	25,981	28,967	34,555	31,493	35,060
National Museums of Scotland	11,933	13,412	13,439	14,379	14,422	16,387	17,432	19,040	19,958
Amgueddfa Cymru	13,379	14,501	13,793	15,358	18,270	17,677	19,582	21,363	23,616
British Museum	44,176	41,639	47,260	51,372	57,485	60,561	54,791	56,045	60,371
Imperial War Museum	17,590	18,293	22,096	21,733	25,343	28,631	32,107	35,680	35,397
Museum of London	13,534	14,559	15,326	16,349	15,559	14,172	17,925	18,937	18,002
National Gallery	17,286	17,710	20,814	21,500	22,425	21,282	22,278	23,778	25,087
National Maritime Museum	11,800	13,300	13,700	15,100	16,000	18,000	20,000	19,564	21,268
National Museum of Science & Industry	31,358	32,451	34,576	41,451	44,249	49,466	52,771	49,689	50,374
National Museums Liverpool	14,584	15,582	15,819	15,673	16,115	17,329	18,684	19,457	21,440
National Portrait Gallery	6,300	6,500	6,800	8,400	8,500	9,900	10,200	9,624	10,273
Natural History Museum	38,368	39,662	41,149	40,099	43,424	46,096	47,658	51,449	65,993
Royal Armouries	4,680	4,340	6,190	6,280	6,550	7,060	7,090	7,980	8,789
Tate	24,759	28,745	29,011	53,101	56,166	67,154	62,897	65,519	71,998
Victoria and Albert Museum	36,612	39,438	39,135	42,861	44,820	47,266	53,304	51,790	52,314
Subtotal – national museums	**310,376**	**319,201**	**340,071**	**386,462**	**415,309**	**449,948**	**471,274**	**481,408**	**519,940**
TOTAL	**318,816**	**338,067**	**361,759**	**410,665**	**446,357**	**483,299**	**508,507**	**522,887**	**563,652**

because they received less from the lottery.

Analysis of Table 3 makes a serious point about investment in Britain's museums and galleries. Occasional availability of resources seems to have been linked to short-term phenomena such as the creation of the lottery and changes in local government funding patterns. Indeed, changes in lottery policy have meant that the level of grants seen in the late 1990s have not been maintained or repeated: Lottery income has dropped from a peak of £76 million in 1998-99 to around £26 million per annum today. Similarly, the brief period of local government expansion after 2000-01 (reinforced by capital control changes in 2004-05) is now coming to an end.

Put simply, the availability of resources for investment in museums and galleries appears to be unrelated to the needs of the sector. Money has been available from time to time, but has been concentrated in a small number of major projects only. There has been little available for the improvement of existing assets. While such large investments (eg, Tate Modern, Great Court British Museum, National Museums Liverpool) have led to hugely successful new facilities with some benefit to the whole museums and galleries sector, there remain many other institutions that have not enjoyed an equivalent capital expenditure uplift.

Table 3 points to the need for a more consistent and logical approach to capital investment in museums and galleries. The DCMS has in recent years attempted to secure increased investment resources for these institutions. There has, as observed above, been increased reliance on government funding for capital expenditure by national museums. But the evidence from this table is that the results are patchy. In a period when museums and galleries are expected to be relevant to changing modern tastes and concerns and also to maintain their large collections, there does not appear to be a consistent capital investment programme to allow institutions to achieve the day-to-day objectives set for them.

Above: Young participant in the Leicester City Museums Service *Leicester and Me* project

Table 3: Capital expenditure

Institutions	Expenditure								
	Capital (£000s)								
	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06
Birmingham Museums & Art Gallery		552		1,748	3,526	947	795	2,810	1,427
Bristol's Museums, Galleries & Archives					424				1,033
Hampshire County Council					232	78	46	55	34
Leicester City Museums Service		85	65	53	62	17	16	1,555	1,879
Norfolk Museums & Archaeology Service			4,273	7,398	272	4,887	1,833	1,856	567
Sheffield Galleries & Museums Trust		34	373	183	132	27	2,420	4,598	7,991
Tyne & Wear Museums	802	638	1,241	3,233	4,141	2,516	3,815	937	750
Subtotal – regional museums	**802**	**1,309**	**5,953**	**12,616**	**8,789**	**8,472**	**8,926**	**11,811**	**13,681**
National Archives	854	1,157	1,654	1,210	1,324	2,230	3,317	1,908	1,873
National Museums of Scotland	15,255	25,481	3,916	3,211	1,476	907	1,543	4,432	3,787
Amgueddfa Cymru		1,028	482	251	46	155	360	806	519
British Museum	19,792	26,988	42,939	49,935	7,818	9,955	17,175	3,692	7,225
Imperial War Museum	5,769	7,794	10,301	17,071	21,456	5,935	4,764	7,498	13,482
Museum of London	691	564	186	2,898	4,706	5,319	3,437	125	125
National Gallery	4,514	3,651	3,878	1,718	1,917	4,239	6,965	11,748	4,383
National Maritime Museum	7,800	10,300	2,100	400	800	1,700	1,500	3,206	6,500
National Museum of Science & Industry	21,935	24,380	25,362	13,998	103,376	11,265	21,250	17,012	5,500
National Museums Liverpool	818	2,260	7,687	15,128	9,489	5,549	4,138	8,161	8,158
National Portrait Gallery	3,000	5,200	9,300	2,200	200	1,300	900	135	371
Natural History Museum	6,583	6,682	16,439	12,296	5,116	8,227	4,293	5,257	4,647
Royal Armouries	1,920	150	260	290	600	240	200	310	327
Tate	25,010	60,320	57,104	8,413	10,285	3,277	1,397	3,669	6,136
Victoria and Albert Museum	5,020	5,226	8,395	9,025	18,398	13,248	10,675	12,707	13,528
Subtotal – national museums	**118,961**	**181,181**	**190,003**	**138,044**	**187,007**	**73,546**	**81,914**	**80,666**	**76,560**
TOTAL	**119,763**	**182,490**	**195,956**	**150,660**	**195,796**	**82,018**	**90,839**	**92,477**	**90,241**

Excluding collections purchase

Collections purchase

In Table 4, we consider the resources available for the leading British museums and galleries to extend or improve their collections. As with the previous table, the numbers are 'lumpy' from year to year, reflecting the variable nature of museums' and galleries' capacities to invest in their stock of artefacts (though the 'lumpy' nature of objects coming to market may also be a factor). The average spend per year of this set of institutions is in the range £25 to £40 million, though there are years above and below this total.

Larger expenditures on collections occur at the National Gallery, the British Museum and Tate. The latter, in particular, appears to manage a relatively consistent spend of around £10 million per year, though prices of many cultural artefacts have risen faster than inflation. For other national institutions, sums of under £1 million per annum are typical. In a number of cases, particularly the major regional museums included in this study, the amounts spent are less than £100,000 a year. Figures from *Art Market Report* suggest inflation in the cost of Old Master paintings over the period since 1980 has been over 400 per cent. For the top two per cent of paintings, the rise was very much higher.

Thus, the amounts spent on acquisitions are very small. In some years, the amount spent by the leading British museums and galleries on purchasing new artefacts – ranging from scientific via heritage to artistic and natural history items – is less than £20 million. Major auction houses in New York, London and Paris from time to time sell individual items costing more than this total. Leading institutions in the United States can often spend several times as much. There can be little doubt that, coupled with the patchy nature of capital investment discussed above, this inability to build up collections by purchase means that British institutions are at an inevitable disadvantage compared with their equivalent institutions in the US and, from time to time, elsewhere in Europe.

Of course, there are other ways for museums and galleries to extend their collections, most obviously by gifts and donations. But this source can only go so far in making up the modest sums available for purchases. Moreover, not everything that institutions would or should collect is currently the object of existing private collections. Also, the scale of private wealth in the United States is such that very much larger collections are likely to be built-up there.

Table 5 compares the expenditure on collections purchase in leading British museums and galleries in recent years. In each case, the average annual expenditure for each year where data exists since 1997-98 is shown. For purposes of comparison, the equivalent data from a number of overseas institutions are also shown, though the time-series for these numbers is rather shorter.

Although the 'overseas' museums available for comparison are to some extent opportunistically selected by being major institutions where there are published data for two or more years, the general point made by Table 5 is clear. There are a number of important museums and galleries in other countries, particularly the US, where the annual level of expenditure on purchases is significantly greater than in the leading UK institutions.

Indeed, there are likely to be many American institutions that are spending significantly more on acquisitions than any British museum or gallery. Moreover, the scale of donations of artefacts and collections (as opposed to money) – particularly in the United States – means this table understates the disadvantage of the UK institutions compared with their American counterparts.

Income

Total income to museums and galleries, shown in Table 6, closely matches the expenditure figures shown in Table 1. The reasons for this are clear: institutions must balance their books and, compared with a number of other State

Table 4: Collections purchase

Institutions	Expenditure: Collections purchase (£000s) 97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06
Birmingham Museums & Art Gallery			319	61	47	45	271	232	148
Bristol's Museums, Galleries & Archives				11	29	19	19	16	69
Hampshire County Council					19	29	30	43	50
Leicester City Museums Service				6	16	61	3	16	
Norfolk Museums & Archaeology Service				1,473		220	130	316	96
Sheffield Galleries & Museums Trust			7	37	43		280	94	
Tyne & Wear Museums	368	59	56	23	12	441	28	229	153
Subtotal – regional museums	**368**	**59**	**382**	**1,611**	**166**	**815**	**761**	**945**	**516**
National Museums of Scotland	781	226	522	600	469	586	582	507	327
Amgueddfa Cymru	1,552	2,781	2,523	1,679	409	422	530	506	554
British Museum	1,866	3,180	2,454	9,725	17,847	2,238	6,578	1,163	2,320
Imperial War Museum	447	420	360	226	94	177	191	190	123
Museum of London					19	190	260	875	
National Gallery	14,124	878	19,884	9,550	7,001	1,668	35,756	7,376	3,262
National Maritime Museum	200	500	400	200	700	1,400	100	347	185
National Museum of Science & Industry	156	263	173	161	88	25	9	4	20
National Museums Liverpool	300	158	100	152	330	4,043	488	1,708	
National Portrait Gallery	400	400	700	300	800	1,000	700	703	1,049
Natural History Museum					171				5
Royal Armouries	340	250	240	90	240	210	250	260	131
Tate	8,979	8,540	12,409	8,474	7,365	11,287	16,865	8,983	13,332
Victoria and Albert Museum	1,193	916	1,590	813	2,503	1,408	1,872	1,287	1,082
Subtotal – national museums	**30,338**	**18,512**	**41,355**	**31,970**	**38,036**	**24,654**	**64,181**	**23,909**	**22,390**
TOTAL	**30,706**	**18,571**	**41,737**	**33,581**	**38,202**	**25,468**	**64,941**	**24,854**	**22,906**

Donated pictures and donations relating to capitalised collection acquisitions are disclosed as donations and sponsorship income, and donated collection acquisitions as collection purchases

Table 5: Average annual spend on collections purchase by museums and galleries – Britain and overseas (£m)

Institution	Average annual expenditure on acquisitions 2001-2004* (£m)
National Gallery	12.270
Tate	10.595
British Museum	7.621
Victoria and Albert Museum	1.577
National Museums Liverpool	1.344
Amgueddfa Cymru – National Museum Wales	0.709
National Portrait Gallery	0.701
National Maritime Museum	0.549
National Museums Scotland	0.549
Museum of London	0.336
Royal Armouries	0.210
Imperial War Museum	0.176
National Museum of Science & Industry	0.057
Natural History Museum	0.171
Van Gogh Museum (Netherlands)	17.402
Louvre (France)	6.416
Rijksmuseum (Netherlands)	3.851
State Museums Berlin (Germany)	1.377
Musee d'Orsay (France)	1.056
Staatliche Kunstsammlungen Dresden (Germany)	0.305
Deutches Museum (Germany)	0.187
J Paul Getty Museum (USA)	17.005
Metropolitan Museum (USA)	16.623
MoMA (USA)	9.859
MFA Boston (USA)	8.237

These figures do not record the value of donations and bequests, and therefore are not representative of the overall collecting activity of institutions

Source for UK figures – MLA/NMDC questionnaire (data from 2000/1-2004/5)
Source for international figures – Published annual reports or annual financial statements, 2001-2004 where available. Research conducted for NMDC by AEA Consulting, 2005.
(Data not available for every year. Currency conversion at current rate, November 2006)

Additional work on this subject has now been published by The Art Fund, which suggests that the analysis in this MLA/NMDC report may understate the problem (The Art Fund 2006)

Table 6: Total income

Institutions	Income Total income (£000s)								
	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06
Birmingham Museums & Art Gallery		7,152	6,310	9,121	11,349	9,422	10,039	12,285	10,964
Bristol's Museums, Galleries & Archives	2,301	2,254	2,242	2,301	2,623	2,737	3,691	4,361	5,999
Hampshire County Council					1,848	1,760	2,135	4,141	4,288
Leicester City Museums Service		2,303	2,405	2,050	2,327	2,529	2,581	4,322	4,741
Norfolk Museums & Archaeology Service			7,802	11,936	4,463	9,555	6,870	8,973	6,720
Sheffield Galleries & Museums Trust		1,770	2,229	2,354	3,226	3,210	6,210	9,436	12,105
Tyne & Wear Museums	6,772	6,330	7,345	9,654	11,159	10,762	12,720	11,741	13,123
Subtotal – regional museums	**9,073**	**19,810**	**28,332**	**37,417**	**36,996**	**39,975**	**44,246**	**55,260**	**57,940**
National Archives	24,871	20,226	22,617	24,016	28,155	32,147	38,972	34,634	36,932
National Museums of Scotland	27,578	35,051	21,105	18,325	17,938	19,472	19,483	22,934	26,648
Amgueddfa Cymru	15,928	17,948	17,456	18,184	20,826	24,403	24,919	24,797	29,268
British Museum	69,547	85,671	76,909	86,025	84,891	87,190	78,664	72,412	68,174
Imperial War Museum	24,815	25,992	32,709	39,718	45,765	34,462	37,278	41,832	49,149
Museum of London	14,399	15,421	17,584	18,859	21,700	18,391	18,203	19,528	20,378
National Gallery	36,106	24,932	44,794	35,804	31,851	30,931	66,585	39,786	34,422
National Maritime Museum	19,000	21,800	17,700	16,500	17,900	18,900	18,500	22,148	24,803
National Museum of Science & Industry	51,404	54,131	62,008	53,157	149,133	63,170	72,773	59,277	55,903
National Museums Liverpool	17,212	19,693	30,324	41,860	33,195	29,982	25,326	34,075	29,115
National Portrait Gallery	10,000	11,600	14,400	10,700	9,500	12,200	11,100	12,047	13,878
Natural History Museum	45,348	46,963	48,854	49,278	50,734	53,585	57,743	61,540	72,791
Royal Armouries	6,230	4,490	6,220	6,890	7,270	7,530	7,590	8,440	10,791
Tate	68,448	86,586	78,356	85,683	81,445	88,036	88,753	88,819	97,621
Victoria and Albert Museum	44,403	45,922	48,895	54,392	64,704	63,493	68,369	66,103	64,752
Subtotal – national museums	**475,289**	**516,426**	**539,931**	**559,391**	**665,007**	**583,892**	**634,258**	**608,371**	**634,626**
TOTAL	**484,362**	**536,235**	**568,263**	**596,807**	**702,003**	**623,866**	**678,504**	**663,631**	**692,565**

Gross ie before deduction of any associated costs, covering the entire group, including trading companies
See notes on page 48 for explanation of discrepancies between total income and total expenditure

institutions have been successful in matching income to spending. Income levels have, like expenditure figures, risen in recent years, suggesting museums and galleries have been effective in raising resources in competition with other public and private institutions. Trading income to the museums and galleries included in this report rose by over 100 per cent (cash) between 1997-98 and 2005-06.

Income – grants

Grants, either from DCMS or represented by core funding from local authorities, constitute slightly over half of museum and gallery income. This proportion appears to be somewhat higher in local government-funded institutions and rather lower in a number of the DCMS funded ones. The British Museum and the National Museum of Science and Industry have, in most years, received less than half their funding from grant-in-aid, while the Imperial War Museum and Tate have received less than half their funding from grants in every year covered by the table. As far as DCMS sponsored institutions are concerned, despite the increase in grant-in-aid for some museums as a response to the removal of admission charges, grant as a proportion of operating expenditure has dropped in recent years.

Table 7a provides detailed figures for each institution. A number of individual grants or local government support totals over £30 million per year, though these are generally to the larger national institutions. Local government support paid to the regional museums is significantly smaller than the grants to the national institutions, with a single exception.

Grant income to DCMS-funded institutions has been rising, though part of the increase was to make up the loss of admission charge revenue after the government decided to abolish such charges in a number of national institutions. For many museums and galleries, increases in year-on-year income from grants have tapered off in the most recent years after faster rises in the earlier part of the period under review. Many grants and direct local government funding now rise only in line with general inflation, and some below this. Grants and direct local government funding rising at the pace of inflation imply reduction compared with real cost increases in the wider economy. Real costs for premises, salaries, goods and services have all gone up more than general inflation – for example, rising steel prices have had a big impact on refurbishment projects. This appears to be true for both local authority and DCMS funded institutions.

While it may not be realistic to expect and direct local government funding to museums and galleries to rise faster than inflation each year, the scale of increased visitor numbers (see Table 12 and text below) in recent years raises important questions about stress on institutional fabric and staff. It might also be expected there would be a reward for productivity improvements. Rising visitor numbers alongside flat (in real terms) resources also raises questions about the incentives to be provided to successful institutions to maintain their productivity.

Income – Lottery

The Lottery has provided most of the major museums and galleries within this study with income. In the early years covered by Table 8, from 1997-98 to 1999-2000, between £48 million and £65 million was provided in each year. However, in the years since 2000-01, the total has slowed to around £20 to £30 million a year. Tate has been the largest individual recipient of Lottery resources and in so doing, has made an important point about the way investment in a gallery can have profound long-term impacts. The National Museum of Science and Industry and the British Museum were also significant recipients of Lottery money.

Amgueddfa Cymru – National Museum Wales' Industrial Strategy was made possible by funding from the Heritage Lottery Fund. Here an investment of £7m from Amgueddfa Cymru – National Museum Wales brought in a further £42m to enable the complete refurbishment of

Table 7a: Grant-in-aid/net core revenue budget or equivalent public funding

Institutions	**Income**								
	Grant-in-Aid (£000s)								
	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06
Birmingham Museums & Art Gallery		5,976	4,922	6,022	6,434	7,172	6,826	6,905	6,074
Bristol's Museums, Galleries & Archives	2,301	2,254	2,242	2,290	2,170	2,718	2,882	2,929	2,999
Hampshire County Council					2,785	2,402	2,457	2,252	2,336
Leicester City Museums Service		2,059	2,112	1,799	2,048	2,112	2,084	2,270	2,381
Norfolk Museums & Archaeology Service			2,558	2,944	3,183	3,246	3,375	3,723	3,848
Sheffield Galleries & Museums Trust		1,214	1,347	1,359	2,046	2,029	2,159	2,066	2,230
Tyne & Wear Museums	4,158	4,133	4,205	4,583	5,109	5,604	5,771	6,320	6,496
Subtotal – regional museums	**6,459**	**15,636**	**17,385**	**18,998**	**23,775**	**25,283**	**25,555**	**26,465**	**26,362**
National Archives	22,378	18,144	20,301	21,113	22,789	27,019	33,117	29,790	33,134
National Museums of Scotland	11,244	13,768	12,927	13,242	14,877	17,045	17,045	17,943	18,193
Amgueddfa Cymru	11,552	11,362	12,741	13,734	15,828	17,095	17,999	19,304	21,035
British Museum	31,860	33,921	34,721	34,939	35,969	35,949	36,419	35,229	37,780
Imperial War Museum	10,571	10,573	11,509	11,743	12,868	15,990	16,241	16,891	17,816
Museum of London	4,310	4,210	4,361	4,481	4,519	4,519	4,919	4,851	4,921
National Gallery	18,343	18,689	19,478	19,215	19,949	19,949	19,449	20,257	20,986
National Maritime Museum	10,500	10,200	10,900	11,700	12,100	13,700	14,000	15,731	15,236
National Museum of Science & Industry	21,081	20,281	23,756	24,329	26,678	29,748	31,162	31,394	32,268
National Museums Liverpool	12,727	12,696	13,714	13,913	15,068	15,569	16,282	16,933	17,605
National Portrait Gallery	4,800	5,000	5,100	5,100	5,500	5,700	5,700	6,008	6,326
Natural History Museum	26,960	26,960	28,783	29,608	32,377	35,585	36,103	38,397	39,370
Royal Armouries	5,220	3,730	4,810	5,220	5,940	6,157	6,286	6,960	6,869
Tate	17,052	17,565	19,727	24,881	26,755	27,179	29,482	28,581	29,799
Victoria and Albert Museum	29,898	29,147	30,034	27,410	30,414	34,271	33,839	34,939	36,233
Subtotal – national museums	238,496	236,246	252,862	260,628	281,631	305,475	318,043	323,208	337,571
TOTAL	**244,955**	**251,882**	**270,247**	**279,626**	**305,406**	**330,758**	**343,598**	**349,673**	**363,933**

Table 7b: Capital grant-in-aid/government or local authority funding for capital work

Institutions	Income								
	Government or local authority funding for capital work/capital Grant-in-Aid for national museums (£000s)								
	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06
Birmingham Museums & Art Gallery				700	675	125	743	2,470	1,342
Bristol's Museums, Galleries & Archives					424				500
Hampshire County Council					232	78	46	55	34
Leicester City Museums Service		25	65	53	62	17	16	1,509	1,606
Norfolk Museums & Archaeology Service			271	1,547	65	2,028	563	1,056	304
Sheffield Galleries & Museums Trust							463	1,773	985
Tyne & Wear Museums	110	77	443	399	209	682	1,253	451	750
Subtotal – regional museums	**110**	**102**	**779**	**2,699**	**1,666**	**2,932**	**3,084**	**7,315**	**5,522**
National Museums of Scotland	12,600	8,200	2,164	1,200	1,304	450	1,050	3,050	5,345
Amgueddfa Cymru	775	1,170	775	775	1,165	775	775	1,358	3,331
British Museum						500	936	2,664	2,014
Imperial War Museum	400		640		250	360	300	600	725
Museum of London	4,310	4,210	4,361	4,481	4,519	4,519	4,919	4,851	4,921
National Gallery						500	1,000	1,000	1,000
National Maritime Museum				500	500	550	540	1,800	1,033
National Museum of Science & Industry			1,000	400		1,500	2,850	1,600	1,700
National Museums Liverpool	400			100	400	1,000	1,050	400	550
National Portrait Gallery								100	100
Natural History Museum	700		800	800		2,500	3,500	1,250	2,100
Royal Armouries									500
Tate	1,611	1,653				600	800	1,300	2,000
Victoria and Albert Museum				3,039	1,923	500	1,000	1,250	2,000
Subtotal – national museums	**20,796**	**15,233**	**9,740**	**11,295**	**10,061**	**13,754**	**18,720**	**21,223**	**27,319**
TOTAL	**20,906**	**15,335**	**10,519**	**13,994**	**11,727**	**16,686**	**21,804**	**28,538**	**32,841**

Table 8: National Lottery funding

Institutions	Income								
	Lottery (£000s)								
	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06
Birmingham Museums & Art Gallery		331		769	2,381	207	241	529	5
Bristol's Museums, Galleries & Archives									1,042
Hampshire County Council						18	29	61	38
Leicester City Museums Service						8		73	107
Norfolk Museums & Archaeology Service			4,002	5,876	53	2,694	1,299	1,104	510
Sheffield Galleries & Museums Trust		251	505	219	328	471	2,340	3,822	6,270
Tyne & Wear Museums	370	143	582	2,626	3,762	2,267	2,550	1,021	597
Subtotal – regional museums	**370**	**725**	**5,089**	**9,490**	**6,524**	**5,665**	**6,459**	**6,609**	**8,569**
National Archives	350	254	557	779	1,161	1,484	1,280	94	154
National Museums of Scotland	524	5,258	3,591	498	309	268			146
Amgueddfa Cymru	685	1,976	479	332	571	2,768	2,302	639	125
British Museum	7,787	11,058	14,817	9,431	607	3,009	1,915		258
Imperial War Museum	4,227	5	4,346	166	137	11	1,660	3,222	7,239
Museum of London	28	119	1,100	150	134			874	100
National Gallery	8,269	55	36		38	28	11,553	966	60
National Maritime Museum	4,300	5,600	400		300	900	500	352	2,279
National Museum of Science & Industry	7,637	12,475	12,383	4,727	724	3,482	3,170	3,671	500
National Museums Liverpool	1	1,260	5,321	10,437	6,339	3,102	1,579	3,830	592
National Portrait Gallery		3,230	5,850	1,640		304	127	185	143
Natural History Museum	63	1,931			115	471	109	886	2,334
Tate	19,914	31,200	16,700	3,928	1,778	4,501	230	1,788	3,459
Victoria and Albert Museum	592	1,423	4,039	6,362	5,509	1,400	444	379	523
Subtotal – national museums	**54,377**	**75,843**	**69,619**	**38,450**	**17,722**	**21,728**	**24,869**	**16,886**	**17,912**
TOTAL	**54,747**	**76,568**	**74,708**	**47,940**	**24,246**	**27,393**	**31,328**	**23,495**	**26,481**

three existing museums and the creation of a new Collections Centre and a brand new flagship museum in Swansea.

Tate Modern is one of the most successful new galleries opened in recent years anywhere in the world. An investment of Lottery resources of around £56 million has not only created a major new exhibition space, it has produced a series of additional benefits in terms of regeneration, 'exports' and national prestige. It is widely accepted that Tate Modern was the anchor for the massive improvements that have taken place in London's Bankside. The millions of new visitors include many from overseas who will have, at least in part, have come to Britain to see the new institution. The expenditure associated with such international visitors is all an 'export'.

National prestige is impossible to measure. However, there can be little doubt that Tate Modern has been an important element in Britain's capacity to sell itself as a cutting edge and modernising country. The scale of the development, coupled with the collection, make a clear statement about the country and its image. The extraordinary success in generating four million visitors annually to the gallery is unique by global standards.

The success of the Lottery in helping to fund Tate Modern begs important questions about the potential to repeat such success elsewhere. Regional museums and several of the national ones have received little from the Lottery, and certainly not the scale of support that would allow the kind of development seen at the Great Court, British Museum and Tate Modern. Yet the latter has shown how the Lottery can lead to a once-and-for-all regeneration of an area, coupled with a radical change of reputation. This is a lesson that should surely be learned for the longer term.

Income – donations and sponsorship

Successive governments have encouraged museums and galleries to raise additional resources from donations and sponsorship. During the radical re-structuring of the British economy during the 1980s, many public institutions were told to look to the private sector to augment their income. In the 1990s and 2000s, similar expectations have remained in place.

The question of why British corporations and individuals are less willing than Americans to donate to cultural institutions, charities and universities has been widely debated. Despite a number of changes to the tax regime, giving in this country continues to lag behind the level seen in the US. Recognition and reward for donation are not sufficient to guarantee high levels of giving. Comparisons between, say, Harvard University and Oxford or Cambridge would make much the same point. The fact that British tax burdens have now risen well above the levels in the US is hardly likely to change this situation for the better in the years ahead.

Against this relatively unpromising background, a number of major museums and galleries have been successful in recent years in maintaining a substantial income from donations and sponsorship. Table 9 examines the trends, institution by institution, since 1997-98 and reveals that the Imperial War Museum, National Gallery, the British Museum, the National Museum of Science and Industry, National Museums Liverpool, and Tate have been able to raise substantial income – as much as £29 million in a single year – from donations and sponsorship. Each of these institutions has maintained a multi-million pound income from such sources.

However, as the figures suggest, it is difficult to rely on donations and sponsorship as a continuous and predictable income source. Companies and individuals face better and worse financial years. Fashions change. Institutions cannot mount a blockbuster exhibition every year. The factors that influence the yield of one-off donations and sponsorship are many and complex. Despite the obvious

Table 9: Donations and sponsorship

Institutions	Income								
	Donations and sponsorship (£000s)								
	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06
Birmingham Museums & Art Gallery		49	35	31	25	18	100	6	18
Bristol's Museums, Galleries & Archives				11	29	19	19	389	191
Hampshire County Council					42	36	43	24	23
Leicester City Museums Service			13	15	14	11	11	10	16
Norfolk Museums & Archaeology Service			187	805	61	208	304	313	139
Sheffield Galleries & Museums Trust		9		1	33	25	24	11	10
Tyne & Wear Museums	132	41	83	67	112	63	90	48	101
Subtotal – regional museums	**132**	**99**	**318**	**930**	**315**	**380**	**592**	**802**	**499**
National Museums of Scotland	2,543	6,098	424	1,903	449	441	558	888	967
Amgueddfa Cymru	413	702	875	470	236	709	549	695	773
British Museum	10,661	23,820	10,966	21,729	23,767	4,997	15,800	4,071	4,760
Imperial War Museum	1,494	6,540	6,582	17,191	21,734	7,227	6,039	7,510	8,249
Museum of London	188	467	440	1,408	2,383	2,206	1,185	1,376	2,220
National Gallery	6,523	2,293	20,112	12,179	6,910	6,871	29,224	11,072	6,712
National Maritime Museum	700	1,900	1,400	600	900	1,900	400	1,439	2,644
National Museum of Science & Industry	3,208	9,780	12,468	6,931	4,681	8,895	9,298	7,143	5,500
National Museums Liverpool	785	2,603	8,218	14,540	8,098	7,673	3,599	9,982	2,377
National Portrait Gallery	450	980	980	570	1,560	2,140	1,460	1,845	3,168
Natural History Museum	1,274	1,570	2,938	2,271	1,456	1,137	2,819	3,134	3,000
Royal Armouries	100	180	300	380	300	700	100	190	113
Tate	13,777	13,827	23,112	23,023	16,350	14,273	23,858	16,976	18,404
Victoria and Albert Museum	2,120	3,808	5,000	4,155	16,666	9,070	10,666	16,489	11,902
Subtotal – national museums	**44,236**	**74,568**	**93,815**	**107,350**	**105,490**	**68,239**	**105,555**	**82,810**	**70,789**
TOTAL	**44,368**	**74,667**	**94,133**	**108,280**	**105,805**	**68,619**	**106,146**	**83,613**	**71,288**

entrepreneurial skills of a number of major museums and galleries, it will never be possible to rely on this particular source as a precise generator of income.

There is a link between the overall capacity of the major museums and galleries to raise resources from donations and sponsorship and changes in the national economy: trading income has increased in recent years. There was a sharp overall increase in income from such sources in the period from 1998-99 to 2000-01, though it is also possible that this period was also influenced by the need to find matching funding for Lottery supported projects (though this, itself, would be an interesting finding). In the years from 2001-02 onwards, income from donations and sponsorship has fallen. This was a period when economic growth slowed down and also when there were a number of one-off events, notably terrorist attacks, that will have influenced national and urban economies.

The implication of the numbers in Table 9 is that it is not going to be possible to rely for much more than 10 to 15 per cent of museum and gallery income from donations and sponsorship. Indeed, for most of the regional institutions and the smaller national ones, such income will generally be measured in hundreds of thousands of pounds per annum, not millions. For institutions based outside London, the fact that many company headquarters are in the capital is almost certainly a significant difficulty. Britain has a powerful concentration of political and economic decision making centred in London. Museums and galleries at a distance from this centre are bound to find it hard to convince key decision takers. Moreover, the prestige associated with 'international' collections or events based in capital cities such as London, Edinburgh or Cardiff is likely to make fundraising rather easier than in other cities and more rural areas.

Income – trading income

The government has also required cultural institutions to attempt to raise the proportion of their income derived from trading services – cafés, restaurants, shops and the many other charged activities associated with the core institutions. In many cities and towns, museum or gallery coffee shops and restaurants are elegant and attractive features that, because of their association with culture, are able to offer an alternative to more traditional locations. However, it is important to state that museums and galleries also exist for rather different purposes than running catering and other trading facilities. It is also important to note that accounting practice for trading varies from institution to institution in ways that will affect comparisons between them.

In 2004, the National Audit Office (NAO) published a study of income generation by museums and galleries (NAO, 2004). This study considered the full range of income generation, including lottery grants, donations and trading. The NAO was broadly optimistic about the possibility of institutions increasing their income from trading and other sources in the years ahead, though there was no suggestion that such income could become a significantly greater share of overall income. Moreover, two constraints were noted. First, because resources are not available, it is hard to buy in the skills needed to trade more effectively. Second, government limits on borrowing make it hard for institutions to raise the resources that a private company would generate to invest in new activities.

Nevertheless, institutions are earning a solid income from trading services. On average, these services are contributing around 10 per cent of gross income. For DCMS sponsored institutions, trading income has increased from an average of 13.1 per cent of total expenditure to 17.4 per cent. Of course, only a part of this turnover will be 'profit' to plough back into core museum and gallery services. Tate (£25.5 million in 2005-06), the National Museum of Science and Industry (£14.1 million), and the British Museum (£14.1 million) are the biggest earners from trading income, followed by the Natural History Museum

Table 10: Trading income (including gross catering and retail income)

Institutions	**Income**								
	Trading income (£000s)								
	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06
Birmingham Museums & Art Gallery		320	358	343	354	293	666	636	552
Bristol's Museums, Galleries & Archives							90	72	91
Hampshire County Council					165	207	186	197	190
Leicester City Museums Service		108	102	113	113	120	151	143	169
Norfolk Museums & Archaeology Service			207	72	191	209	201	218	232
Sheffield Galleries & Museums Trust		54	47	57	302	373	359	424	444
Tyne & Wear Museums	311	308	283	378	455	498	614	615	534
Subtotal – regional museums	**311**	**790**	**997**	**963**	**1,580**	**1,699**	**2,267**	**2,305**	**2,211**
National Archives	2,143	1,828	1,759	2,124	3,355	2,694	3,475	3,517	3,644
National Museums of Scotland			426	280	296	355	270	334	467
Amgueddfa Cymru	526	588	607	597	1,110	1,138	1,285	1,667	1,930
British Museum	9,327	8,743	9,117	11,509	15,564	15,848	15,850	14,732	14,173
Imperial War Museum	5,632	6,185	6,137	6,746	7,156	8,025	9,162	9,504	8,750
Museum of London	4,571	5,461	6,493	7,302	6,827	5,216	5,624	5,868	6,606
National Gallery	1,078	1,555	1,792	1,949	1,821	1,631	2,247	2,111	2,524
National Maritime Museum	700	800	1,100	900	1,000	1,000	1,300	1,116	1,354
National Museum of Science & Industry	5,710	7,201	8,606	12,866	16,759	17,386	16,949	13,710	14,100
National Museums Liverpool	1,542	1,515	1,445	1,336	1,179	1,502	1,652	1,698	1,702
National Portrait Gallery	1,510	1,450	1,500	1,830	2,410	2,480	2,080	3,001	2,975
Natural History Museum	5,159	5,422	6,323	6,434	7,610	7,689	7,745	10,368	12,786
Royal Armouries	530	130	310	430	650	760	800	860	787
Tate	7,862	9,665	8,203	20,277	20,025	24,218	20,514	23,759	25,515
Victoria and Albert Museum	5,301	7,171	5,776	7,655	6,745	7,673	10,933	8,450	7,225
Subtotal – national museums	**51,591**	**57,714**	**59,594**	**82,235**	**92,507**	**97,615**	**99,886**	**100,695**	**104,538**
TOTAL	**51,902**	**58,504**	**60,591**	**83,198**	**94,087**	**99,313**	**102,153**	**103,000**	**106,749**

Table 11: Admissions income (including for temporary exhibitions)

Institutions	Income								
	Admissions (£000s)								
	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06
Birmingham Museums & Art Gallery		39	42	125	133	119	396	49	74
Hampshire County Council					598	486	409	409	395
Leicester City Museums Service		24	52					7	
Norfolk Museums & Archaeology Service			311	210	482	479	490	585	709
Sheffield Galleries & Museums Trust		2	2		103	94	50	51	55
Tyne & Wear Museums	371	214	217	246	346	220	262	229	168
Subtotal – regional museums	**371**	**279**	**624**	**582**	**1,662**	**1,398**	**1,606**	**1,328**	**1,400**
National Museums of Scotland	109	471	747	544	195	371	238	481	969
Amgueddfa Cymru	848	907	802	685					
British Museum	547	163	893	349	1,215	576	126	916	1,416
Imperial War Museum	2,491	2,689	3,495	3,872	3,620	2,849	3,378	3,950	4,241
Museum of London	351	464	485	534	2,444		189	195	132
National Gallery	537	1,178	1,738	1,118	1,921	1,154	1,819	2,957	1,711
National Maritime Museum	1,200	1,300	1,800	1,500	1,100	100	700	189	415
National Museum of Science & Industry	3,724	4,013	3,191	3,042	2,366				
National Museums Liverpool	507	566	455	335					
National Portrait Gallery								694	874
Natural History Museum	4,423	4,751	4,255	4,333	3,647	574	1,149	678	1,077
Royal Armouries			460	510	330	143	156	160	502
Tate	1,734	2,182	1,888	2,271	3,863	5,550	3,213	5,539	6,795
Victoria and Albert Museum	2,334	2,513	1,840	2,821	1,550	1,611	2,903	1,972	2,206
Subtotal – national museums	**18,805**	**21,197**	**22,049**	**21,914**	**22,251**	**12,928**	**13,871**	**17,731**	**20,338**
TOTAL	**19,176**	**21,476**	**22,673**	**22,496**	**23,912**	**14,326**	**15,477**	**19,059**	**21,738**

(£12.8 million), suggesting that institutions with large visitor numbers in London are best able to maximise their earnings from these sources.

For the major regional museums included in this study, the potential for major trading income generation is clearly less. Tyne & Wear Museums and Birmingham are the leaders in terms of total yield, with £500,000 to £600,000 per annum in each case. The overall yield to the museums and galleries in the study is around £100 million a year. This figure is significantly more predictable than the 'donations and sponsorship' income totals considered above. However, the NAO study suggests there is little chance that surpluses on trading can realistically make more than a marginal contribution to core income.

Income – admission charges

The final category of income considered here is admission charges. For the DCMS-funded national museums and galleries, the government has implemented a policy of free admission that applies to core collections. Of course, the national institutions are still able to charge for one-off exhibitions. Regional museums and galleries operate their own local policies, but the vast majority maintain free admission.

A number of regional museums are raising more in admission charges than some national bodies. For example, Norfolk Museums & Archaeology Service generated admission charges income of over £700,000 in 2005-6. An odd consequence of the free admissions policy is that places where museum and gallery admissions might be expected to be lower (ie smaller cities and rural areas) find themselves generating more in such charges than some key national institutions with many overseas visitors.

The government's policy towards free admissions is well understood. However it is important to make clear that in the absence of the capacity to tap into the rising national spend on leisure and recreation, museums and galleries come under additional pressure to raise money from other sources. In this sense, the admission charges policy for national museums and galleries is very different from the recently adopted model for universities. In higher education, a means-tested fee is being introduced from the autumn of 2006 specifically designed to raise income from those who benefit from the provision. In the longer term, fee income will allow universities to take advantage of the earnings growth of graduates. Museums and galleries, unlike theatres, have virtually no equivalent capacity to generate income from the economic benefits they produce.

Of course, there are some who argue for free admissions as an absolute right. The difficulty with this position is that it appears to condemn museums and galleries to a flow of public resources that is likely to decline in real terms over time. With little capacity to benefit from raising incomes, museums and galleries risk being badly left behind in the contest for national resources.

Visitor numbers

The number of visits to the major institutions examined in this report was over 42 million in 2005-6. The DCMS's *Taking Part* survey (DCMS, 2005) suggests that 43 per cent of people visit a museum or gallery at least once a year, while the number shown in Table 12 is more than the attendance at the Premiership plus the whole of the rest of league football for 2004-05. It is 50 per cent more than the number of people who annually visit the West End and Broadway theatres combined. Tate has over six million visitors per annum, followed by the British Museum and the National Gallery with over four million. The National Museum of Science and Industry, the Natural History Museum, the Victoria and Albert Museum and Imperial War Museum each have between two and four million visitors.

The regional museums and galleries are also mass attractions, with over 500,000 visitors to the Bristol's Museums, Galleries & Archives. Birmingham Museums and Art Gallery and Sheffield Museums and Galleries Trust and well over 1.5 million at Tyne & Wear Museums.

These numbers suggest that Britain's leading museums and galleries are part of the mass visitor attraction business. According to research by the Association of Leading Visitor Attractions, seven out of the top ten leading visitor attractions in the UK are national museums (ALVA, 2005). Table 13 makes this point by comparing a number of leading national museum visit numbers with those of major football clubs in the most recent year for which full numbers exist. The comparison is instructive. The major national museums and galleries have between three and four times as many visitors per year than even Manchester United. Of course, there is a charge for visiting a football match and they occur only once or twice a week. But the mass scale of visits to the national and regional hub museums is such that it must be seen as an enterprise with an equivalent economic and social importance, albeit with different cultural attributes.

If the DCMS's *Taking Part* statistics are compared with MORI research about interest in sport, the results are revealing. Whereas 43 per cent of the population have actually visited a museum or gallery within the past year (suggesting sufficient interest to make a trip to the institution concerned), MORI's Tracking the Field research shows just 41 per cent of the population are 'interested' in football (MORI, 2005).

The kinds of people visiting museums and galleries is changing. In evidence to the Culture, Media and Sport Select Committee presented in January 2006 (MLA, 2006), the Museums Libraries and Archives Council provided evidence that the "Renaissance in the Regions policy, which has focused on increasing and developing wider audiences to regional museums" has had a number of beneficial effects. "Between 2002-03 and 2003-04 participation by socio-economic groups C2,D&Es and by black and minority ethnic groups who have traditionally not been active users of or visitors to museums increased by 15.2 per cent and 60 per cent respectively."

There has been a similar focus in DCMS institutions. Museums and galleries are delivering social as well as economic benefits to society.

Above: Visitors enjoying an exhibition at the Victoria and Albert Museum

Table 12: Visitor numbers

Institutions	Visitors								
	Visitor numbers (000s)								
	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06
Birmingham Museums & Art Gallery	700	1,005	778	788	698	553	660	599	540
Bristol's Museums, Galleries & Archives	251	432	455	449	489	492	495	548	553
Hampshire County Council	256	251	262	403	381	340	330	356	240
Leicester City Museums Service	275	280	302	259	285	291	320	242	248
Norfolk Museums & Archaeology Service			231	131	261	301	279	316	314
Sheffield Galleries & Museums Trust		193	195	195	368	433	503	481	505
Tyne & Wear Museums	1,153	1,155	1,056	1,166	1,450	1,278	1,342	1,674	1,569
Subtotal – regional museums	**2,635**	**3,316**	**3,279**	**3,391**	**3,934**	**3,688**	**3,929**	**4,217**	**3,969**
National Archives	88	95	98	101	106	108	104	104	108
National Museums of Scotland	1,050	661	854	1,110	1,250	1,330	1,290	1,320	1,430
Amgueddfa Cymru	739	718	661	690	1,430	1,278	1,222	1,318	1,344
British Museum		4,488	4,368	4,589	4,813	4,624	4,622	4,778	4,485
Imperial War Museum		1,374	1,372	1,609	1,608	1,980	1,966	2,056	1,907
Museum of London	299	333	338	371	312	363	382	557	375
National Gallery	4,865	4,800	5,000	4,780	4,859	4,100	4,648	4,900	3,953
National Maritime Museum	470	480	860	800	1,000	1,208	1,365	1,518	1,512
National Museum of Science & Industry	2,250	2,158	2,831	2,822	3,061	4,260	4,270	3,816	3,577
National Museums Liverpool	916	832	792	710	952	1,237	1,526	1,538	1,608
National Portrait Gallery	950	990	1,000	1,220	1,480	1,320	1,426	1,469	1,528
Natural History Museum	1,778	1,806	1,702	1,636	2,188	2,921	3,012	3,230	3,309
Royal Armouries		335	218	235	338	398	394	433	395
Tate		3,034	2,483	6,783	5,528	6,333	6,215	6,293	6,412
Victoria and Albert Museum	1,416	1,438	1,217	1,342	1,863	2,533	2,669	2,472	2,196
Subtotal – national museums	**14,821**	**23,542**	**23,794**	**28,798**	**30,787**	**33,993**	**35,110**	**35,800**	**34,138**
TOTAL	**17,456**	**26,858**	**27,073**	**32,188**	**34,721**	**37,681**	**39,040**	**40,017**	**38,107**

Total number of visits

Table 13: Museum and gallery visit numbers and football club attendances, 2004-05

National	visitors/ attendance
Tate	6,292,505
National Gallery	4,900,000
British Museum	4,778,000
National Museum of Science & Industry	3,815,850
Natural History Museum	3,230,250
Manchester United	1,289,541
Newcastle United	985,040
Liverpool	809,150
Chelsea	795,534
Arsenal	721,602
Regional	
Bristol's Museums, Galleries & Archives	548,338
Hampshire CC Museums & Archives	355,874
Leicester City Museums Service	242,249
Norfolk Museums & Archaeology Service	316,182
Sheffield Galleries & Museums Trust	480,808
Tyne & Wear Museums	1,673,917
Birmingham Museums & Art Gallery	599,303
Bristol Rovers	162,776
Southampton	581,583
Leicester City	555,146
Norwich City	462,203
Sheffield Wednesday	531,289
Newcastle United	985,040
Birmingham City	546,434

(Sources: (i) MLA/NMDC Questionnaire; (ii) www.football365.com)

Visitors – overseas

Data about overseas visitors is less easily available than for total attendance. Nevertheless, Table 14 suggests that in the years 2002-03 to 2005-06, there was a total of 10 to 11 million overseas visitors per year at the major institutions covered by this study. Although these numbers are predominantly generated by a small number of national institutions (for example, the British Museum, Tate, National Gallery and Natural History Museum) there is clear evidence that the number of overseas visitors to major cities outside Britain is increasing. National Museums Liverpool has seen its international visitor total rise from 49,000 to 112,000 within seven years.

The implications of such large numbers of foreign visitors to major British museums and galleries are two-fold. First, it is clear that these institutions are a key element in Britain's visitor 'offer'. This point is supported by a number of surveys undertaken by VisitBritain. Given the relatively large expenditure by international visitors to the UK, the attribution of even a small part of the overall visitor spend to museums and galleries would be likely to run into hundreds of millions of pounds. In the NMDC's *Valuing Museums* report, published in 2004, it was estimated that some £320 million per year was spent in the UK by overseas visitors solely as the result of the time they were willing to attribute to museums and galleries. This estimate has not been challenged and it appears likely that the slightly wider population of institutions considered in the current report will by now have exceeded this number. Thus, it seems realistic to assume that at least £350 million a year is now generated overseas visitors attracted by major museums and galleries.

Visitors – website

Table 15 shows the number of website visits to the major museums and galleries covered by this report. The total for 2005-06 is over 100 million. Several individual institutions had over ten million website visits and the National Archives achieved over 11 million. Among the major regional museums included in this study, Birmingham Museums & Galleries had 1.36 million website visits and Tyne & Wear museums 679,000.

Museums and galleries have been successful in opening up their collections to wider public access. The question of what proportion of the museum or gallery's holdings can be comprehensively available to website visitors is inevitably linked to the availability of resources. As internet services develop, the costs of maintaining attractive website access will doubtless increase.

Staff, volunteers and 'friends'

Table 16 shows the total number of staff employed, full and part-time, by the major museums and galleries within this report in 2004-05. There are almost 8,300 full-time staff, plus more than 1,100 part-timers. Institutions have just under 3,000 volunteers and over 140,000 'friends'.

The staff totals, showing about nine and a half thousand employees, suggest that major museums and galleries will be significant contributors to the local and regional economy where they are located. Thus, for example, the 219 full-time staff at Tyne & Wear Museums or the 481 at National Museums Liverpool will represent a significant group within the local economy, cascading spending power into neighbourhoods well beyond the institution itself. But these employees will also include a number of key 'knowledge economy' workers of the kind much prized in economic regeneration studies. Along with university staff, public sector managers and senior private sector employees, museums and galleries employ many of the kind of creative and educated individuals associated with economic success by academics such as Richard Florida. In his book *The Rise of the Creative Class*, Florida (Florida, 2002) argued that economic progress in a city can be linked to the proportion of 'creatives' within its population.

Table 14: Overseas visitors

Institutions	**Visitors**							
	Overseas visitors (000s)							
	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06
Leicester City Museums Service						6	4	4
Norfolk Museums & Archaeology Service						11	19	22
Sheffield Galleries & Museums Trust						10	13	14
Tyne & Wear Museums	12	11	12	15	19	30	52	39
Subtotal – regional museums	**12**	**11**	**12**	**15**	**19**	**57**	**88**	**79**
National Archives					30	21	14	43
Amgueddfa Cymru	86		69	157	141	98		67
British Museum			2,800	2,647	2,404	2,496	2,389	2,242
Imperial War Museum	632	560	560	670	540	589	540	475
Museum of London	136	149	130	109	163	187	211	
National Gallery	2,400	2,500	2,400	2,400	2,100	2,324	1,700	1,502
National Maritime Museum	222	420	408	472	480	495	827	802
National Museum of Science & Industry	420	364	245	380	672	1,189	622	612
National Museums Liverpool	50	47	43	57	49	107	108	113
National Portrait Gallery	80	219	244	444	390	366	272	331
Natural History Museum		522	482	581	1,475	957	1,028	905
Tate					1,794	1,921	2,155	2,514
Victoria and Albert Museum						887	863	932
Subtotal – national museums	**4,024**	**4,781**	**7,381**	**7,918**	**10,238**	**11,636**	**10,729**	**10,536**
TOTAL	**4,036**	**4,792**	**7,392**	**7,932**	**10,258**	**11,693**	**10,817**	**10,616**

Table 15: Website visits

Institutions	Visitors No. of unique website visits 2005/06
Birmingham Museums & Art Gallery	1,359,047
Bristol's Museums, Galleries & Archives	152,491
Hampshire County Council	240,429
Leicester City Museums Service	102,692
Norfolk Museums & Archaeology Service	208,026
Sheffield Galleries & Museums Trust	135,520
Tyne & Wear Museums	678,897
Subtotal – regional museums	**2,877,102**
National Archives	11,963,644
National Museums of Scotland	3,900,000
Amgueddfa Cymru	1,292,733
British Museum	8,755,000
Imperial War Museum	7,787,302
Museum of London	1,637,486
National Gallery	6,754,100
National Maritime Museum	7,427,214
National Museum of Science & Industry	12,634,572
National Museums Liverpool	4,338,588
National Portrait Gallery	7,440,000
Natural History Museum	11,002,569
Royal Armouries	233,652
Tate	8,000,000
Victoria and Albert Museum	11,580,600
Subtotal – national museums	**104,747,460**
TOTAL	**107,624,562**

Table 16: Staff, volunteers and friends

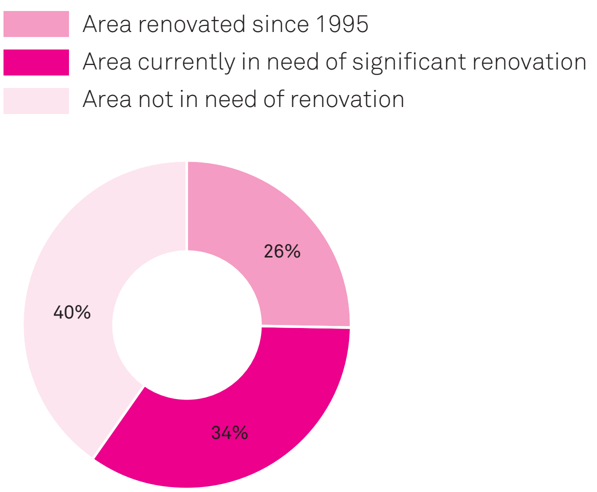
Institutions	Staff				
	Full-time	Part-time	Other	Volunteers	Friends
Bristol's Museums, Galleries & Archives	68	26	250	75	550
Hampshire County Council*	73	56	0	143	0
Leicester City Museums Service	43	18	2	61	350
Norfolk Museums & Archaeology Service	94	48	15	195	195
Sheffield Galleries & Museums Trust	71	34	0	10	824
Tyne & Wear Museums	219	71	26	285	1,836
Subtotal – regional museums	**568**	**253**	**293**	**769**	**3,755**
National Archives	507	93	60	150	534
National Museums of Scotland	368	116	0	183	7,900
Amgueddfa Cymru	506	95	168	35	1,092
British Museum	947	35	43	350	13,010
Imperial War Museum	556	115	193	1,000	5,049
Museum of London*	349	57	20	0	15,000
National Gallery	376	48	27	0	
National Maritime Museum	355	116	0	50	3,211
National Museum of Science & Industry*	756	54	0	243	1,804
National Museums Liverpool	481	54	0	264	2,400
National Portrait Gallery	206	(FTE)			
Natural History Museum*	759	(FTE)	85	218	6,000
Royal Armouries	160	50	0	4	0
Tate	660	0	0	90	72,798
Victoria and Albert Museum	667	80	400	210	12,354
Subtotal – national museums	**7,653**	**913**	**996**	**2,797**	**141,152**
TOTAL	**8,221**	**1,166**	**1,289**	**3,566**	**144,907**

* 2004/05 figures

The 143,000 'friends' or equivalent supporters are important for a different reason. These individuals represent a major voluntary input not just into a museum or gallery, but into civil society more generally. At a time when national politicians are concerned about the loss of trust in government and many State institutions, the willingness of such a relatively large number of people to become involved in a major museum or gallery is useful evidence of the capacity of public institutions to engage citizens in a positive way. Museums and galleries probably have skills here that are of wider benefit to society.

Area of operations and the need for renovation

The questionnaire sent to museums and galleries asked them to state the amount of space they occupy and how much of this is judged to be in need of significant renovation. The results are shown in the chart below. Alarmingly, over one-third of all the space in use in major museums and galleries covered by this report is deemed 'in need of significant renovation'. In a number of individual institutions, notably National Museums Scotland, National Museum Wales, Imperial War Museum and Leicester City Museums Service, around half or more of their space is in need of renovation. Without investment in their infrastructure museums are forced to work less effectively and efficiently than they are capable of, because buildings and services constraints hinder achievement of optimum performance.



Loans and publications

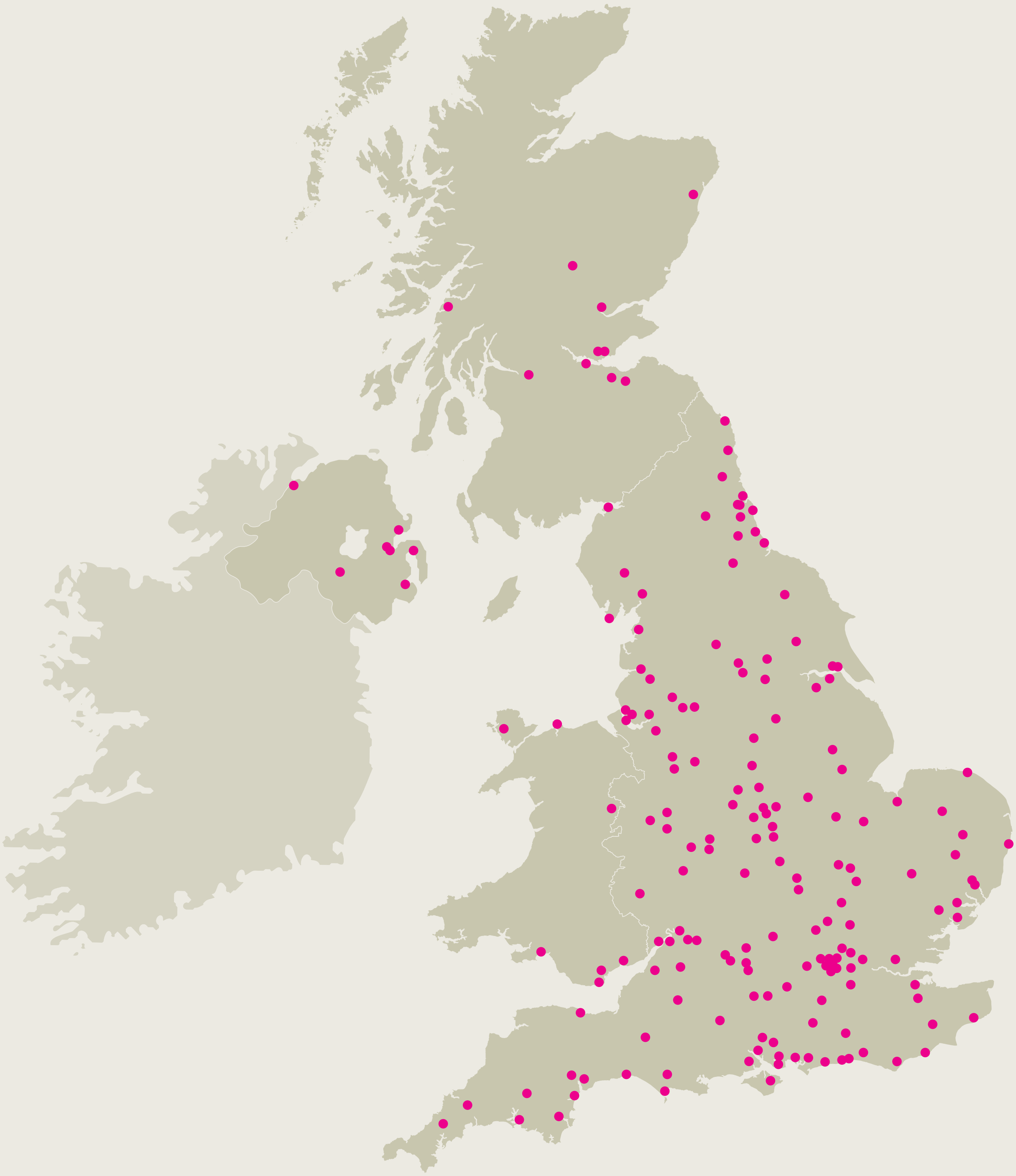
Table 17 below provides numbers of artefacts loaned by museums and galleries to other institutions within Britain or overseas. A key element in allowing a wider population to access the collections held in major institutions is the possibility of sending exhibits to be viewed elsewhere. The, incomplete, data shown in Table 17 below suggests that at least 180,000 exhibits were loaned in 2004-05. Many of these loans were small items from the Natural History Museum whose prodigious loan activities, albeit often to individual researchers, are extraordinary. But many other regional and national institutions are sending artefacts to locations locally, nationally and overseas. The maps on the following pages show a full list of the locations visited by museum and gallery exhibits during 2004-05.

Table 17: Loans – UK and International

Institutions	**Loans**	
	No. of objects loaned in UK 2005/06	No. of objects loaned internationally 2005/06
National Archives	65	4
National Museums of Scotland	2,540	70
Amgueddfa Cymru	26,175	13,661
British Museum	1,868	1,692
Imperial War Museum	380	81
Museum of London*	106	170
National Gallery	215	43
National Museum of Science & Industry	105	23
National Museums Liverpool*	605	29
Natural History Museum	23,080	47,403
Tate *	393	723
Victoria and Albert Museum	2,587	400
TOTAL	**58,263**	**64,532**

* 2004/05 figures

UK venues to which objects were loaned in 2004/2005



Towns and cities where objects from collections were loaned in 2004/2005

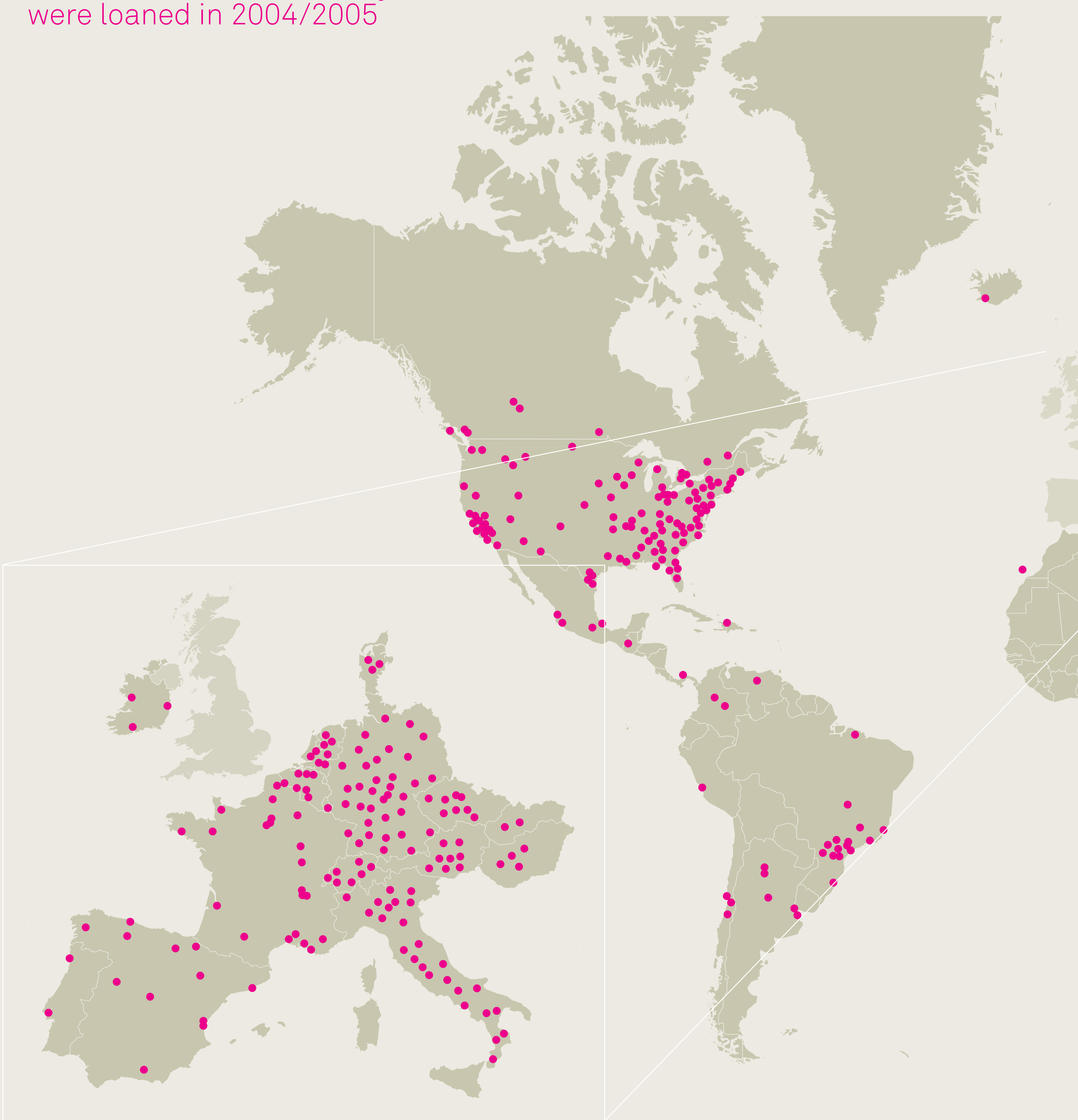


Table 18: Publications

Institutions	Publications No. of publications 2005/06
National Archives	48
National Museums of Scotland	105
Amgueddfa Cymru	109
British Museum	194
Imperial War Museum	20
Museum of London*	65
National Gallery	69
National Maritime Museum	84
National Museum of Science & Industry	26
National Museums Liverpool*	35
National Portrait Gallery*	56
Natural History Museum	613
Tate *	80
Victoria and Albert Museum	130
TOTAL	**1,398**

* 2004/05 figures

Table 18 also provides a summary of the number of publications from individuals based in museums and galleries. Overall, more than 1,400 academic or similar publications were recorded during 2004-05. This total is an important indicator of the continuing importance of the serious academic and expert contributions made by institutions and their staff.

The basic facts and figures about Britain's major museums and galleries covered by this report reveal a cultural sub-sector with a very wide reach. It is evident that institutions have been able to evolve into mass tourist attractions while retaining their original educational and curatorial expertise. The precise nature of the relationship between the large public-facing museums and galleries and the complex science of maintaining exhibits and promoting scholarship cannot be ignored. There is a clear danger that the many demands placed on institutions will, unless resources rise to match expectations, undermine traditional scholarship. It is not impossible to do many different things simultaneously. However it will be increasingly costly to do so.

Economic impact

In recent years, many studies of the arts and cultural institutions have attempted to estimate the scale of economic activity represented by either a sector, a sub-sector or an individual institution. A major starting-point for such studies is the Policy Studies Institute's pioneering 1988 study *The Economic Impact of the Arts in Britain* (Myerscough, 1988). Subsequently, there have been analyses of key sectors, such as heritage, and individual one-off events such as the Eden Project (Jasper, 2002).

In *Valuing Museums*, an earlier report on major museums and galleries (NMDC, 2004), it was estimated that the full economic impact of the museums and galleries (including their direct expenditure, spending by visitors and indirect/induced effects) was in the range £1.83 billion to £2.07 billion. The 'population' studied in the current report is rather different. It excludes some DCMS-funded bodies, but includes several key regional museum services. The expenditure of the 2006 institutions is slightly less than those studied in 2004, though with the exception of the British Library, the major bodies covered in 2004 are in the 2006 study.

Critiques of economic impact studies (eg, University of Durham, 2000) have pointed to both the advantages and also the limitations of economic impact studies. Such research may provide important insights into the overall scale of a sector. On the other hand, there are problems associated with the different multipliers used to estimate wider economic effects. There must also be a risk of double-counting of the same economic activity. Moreover, as Section 2 of this report suggested, new kinds of analysis are being undertaken to assess the value the public attaches to cultural and arts institutions.

Nevertheless, if the turnover of the institutions covered in this report were subject to the same further calculations as those made for the 2004 study, the overall economic impact would be very similar. The predicted expenditure by visitors will, if anything, have risen with growth in the national and international economy. International visitors, who tend to spend significantly more than British ones, have increasingly ventured into the core cities as well as London. The, relatively conservative, multipliers used in the 2004 report would be no less appropriate than before.

The overall economic impact of the institutions covered by this report is likely, therefore, to be in the range £1.5 to £2 billion. That is, the ancillary effects of visitor spending and indirect/induced impacts are likely to be slightly more than double the turnover of the sub-sector. Of course, the full museums and galleries sub-sector, as measured by MLA, has a turnover of about £900 million, so the full economic impact will almost certainly be in excess of £2 billion per year.

Productivity

The Chancellor commissioned Sir Peter Gershon to produce a major report on the scope for efficiency within the public sector. Museums and galleries, in common with other central and local government-funded bodies, are expected to deliver efficiencies. In the 2005-2008 *Efficiency Target Technical Note* published by DCMS, one of the targets set is to increase the numbers accessing museums' and galleries' collections by two per cent by 2008. The *Note* comments that a number of museums and galleries have already made significant efficiency savings and redirected resources to frontline services.

In the 'Efficiency Programme Projects' section of the *Note*, one of the criteria for success is "getting more outputs or improved quality... for the same inputs" or "for an increase in resources that is proportionately less than the increase in output or quality". The evidence of recent years, as suggested by Table 7 (grant-in-aid) and Table 12 (visitor numbers), is that the number of visits to institutions has risen faster than grants. Over the period 1998-99 to 2005-06 (with full sets of data for both years), the number of visits to national museums was up 52 per cent, while direct government funding rose by 41 per cent (in cash) – implying a major and sustained productivity gain in the terms suggested by the *Technical Note*.

The previous achievement of expansion ahead of grant-in-aid rises may, of course, make further productivity gains more difficult to achieve. Institutions with millions of annual visitors can, presumably, only expand so far within their existing structures and staff totals. However, there is no doubt that recent evidence suggests museums and galleries have been effective at delivering productivity improvements. Past investment allowed such improvements to occur and could, presumably do so again in the future.

Notes on discrepancies between total income and total expenditure (Tables 1 and 6)

Leicester City Museums Service

1995/96 to 1997/98 n/a = Leicester City Museums Service came in to being following Local Government re organisation in April 1997. 04/05 and 05/06 mismatch of income to expenditure due to more capital expenditure than capital income received.

Norfolk Museums & Archaeology Service

These figures have been compiled from a number of sources. The Operating Expenditure is made up of Norfolk County Council revenue accounts and also external partnership funding which is accounted for separately. The difference between total income and total expenditure may also be due to income received in one year being spent in subsequent financial years.

Sheffield Galleries & Museums Trust

Differences between total income and total expenditure are used by the Trust to build up reserves to be used on future projects, the use of these reserves on those projects, and to build up a general reserve to protect the Trust in times where income falls below expectations. An £18 million project to refurbish Weston Park Museum was begun in 2003, and has lead to increased funding as a result. At end of March 2005 £976,000 had been received in advance of capital expenditure on Weston Park Museum and was included in the Trust's reserves.

Tyne & Wear Museums

The additional expenditure is Capital Expenditure and was finance from Europe, Trust Funds and Foundations.

National Archives

These figures are reconciled to the Incoming Resources and Resources Expended line of our statutory accounts. The difference is due to: Donated Assets; Depreciation; Pension Finance Costs; Capitalised expenditure (including capitalised heritage assets) and the difference between accrued expenditure financed from grant in aid (which itself is not accrued) and grant transfers (deducted from both income and expenditure).

British Museum

Over the period 1997/98 to 2001/02 differences reflect the timing of expenditure on the Great Court. Difference in 2002/03 reflects profit on sale of a building and in 2004/05 VAT recovery.

Museum of London

Timing differences for large archaeological and capital projects.

National Gallery

The National Gallery's catering and retail operations are outsourced, and these figures therefore represent net catering and retail income. Gross figures would be between £5m and £10m higher.

National Museum of Science and Industry (NMSI)

In 1995-96 NMSI Trading Ltd was not consolidated with the NMSI accounts but figures included show it consolidated on a consistent basis with later years.

Tate

Linked to phasing of capital income and expenditure and movement on reserves.

Victoria and Albert Museum

Caveats about comparability and special factors in particular years apply: e.g. Apsley House included in early years; Museum of Childhood closed Oct 05-Nov 06. South Kensington only series included as they often go back further than for branch museums. Estimates given where they could be based on reasonable assumptions about data available.

Right: Victoria and Albert Museum

4 HOW MUSEUMS AND GALLERIES DELIVER WIDER BENEFITS

Britain's leading museums and galleries are involved with a wide range of institutions throughout the public, private and not-for-profit sectors. Their engagements are at many levels and are designed to use collections and expertise for a number of benefits. Some of these benefits will relate directly to central or local government programmes and expectations. Others are influenced by longer term partnerships or support requirements of international scholarship and subject research. A number have resulted from the needs of local residents.

This section of the report examines a number of the initiatives and programmes undertaken by leading museums and galleries. Not all the institutions are represented. Rather, the purpose is to provide a wide range of projects and to show the ways institutions feed their expertise into society. A number of the projects involve the media or heavily promoted exhibitions and were designed to allow the widest possible access to museum and gallery collections.

Regional and national institutions regularly collaborate on projects. A number of initiatives of this kind are shown on the following pages.

The main types of project exemplified have the following characteristics or purposes:

- providing the country, a city or county with an understanding of its history;
- working with the media to promote exhibitions and therefore to propagate ideas, debate or knowledge;
- initiatives for schools and young people to attract them into museums and galleries;
- programmes for new citizens to provide a stepping-stone into British culture and life;
- encouraging intergenerational links and understanding;
- helping the government deliver educational or social initiatives;
- working with other public, private and voluntary bodies to promote economic or social objectives;
- reacting to current affairs and providing a context for analysis;
- promoting British ideas and creativity overseas;
- understanding how museums and galleries can better link to a changing population in a rapidly-developing and competitive world.

A number of projects may pursue two or more of these objectives in parallel. Each of the case studies in the following section of this report describe one or more programmes or projects from a national or regional museum or gallery.

Case studies

British Museum

1 – A response to Iraq
Responding to an international situation

The British Museum highlighted the danger to the antiquities of Mesopotamia at the outbreak of war with Iraq and again after the looting of the Baghdad Museum, the illegal excavation of the archaeological sites and irreparable damage to the site of Babylon (reported in 2005). Working with colleagues in Iraq the Museum has consistently drawn attention to these issues resulting in international media coverage on an unprecedented scale. The museum organised programmes of exchange and training for Iraqi colleagues and a wide-ranging public programme in London – conferences, lectures, gallery talks, a Guardian debate etc – and around the UK with the tour of the Queen of the Night. This shows how the museum can play a crucial role in deepening public understanding of contemporary issues by placing them in their historical context.

Conservator Karen Birkhoelzer with visiting Iraqi curators at the British Museum

2 – A programme for Africa
An approach to international relations

The British Museum, as lead partner in Africa 2005, organised a very extensive programme of exhibitions, events, debates etc in London, the tour of the Throne of Weapons throughout the UK and the programme of loans to Africa including the first ever exhibition curated by an African using the Museum's African Collection. The Commission for Africa Report was launched at the British Museum with the Prime Minister, Tony Blair. The Museum developed a partnership with the BBC on behalf of all of the Africa 05 partners (approximately 60) across all channels and all platforms including online. The British Museum also worked with the BBC to host the last ever Ground Force programme, building an African Garden at the Museum and partnered again with the BBC for Africa Live. Sir Bob Geldof and Chancellor Gordon Brown both attended the public-facing day of fantastic free events for all ages which included dance, music performance, workshops, and gallery talks. This partnership is widely regarded as groundbreaking and a model for future collaboration. It also helped people understand Africa as a place of rich cultural achievement beyond the stories in the main headlines.

Africa Live 2005 – The African Childrens Choir on stage at the British Museum

Imperial War Museum

1 – Their Past Your Future

Touring and on-line exhibitions across the UK

Their Past Your Future, (TPYF) is a national initiative led by the Imperial War Museum developing a touring exhibition and providing funding for events and publicity to commemorate the 60th anniversary of the end of World War II. Between February 2005 and March 2006 nine touring exhibitions visited 70 venues throughout the UK. Over 2 million people visited the exhibitions. In all, 117 museums, libraries and archives partnered with over 188 local community groups and organisations to run over 1,000 educational activities for people of all generations.

An online version of the exhibition (which can be viewed at www.theirpast-yourfuture.org.uk) was launched in July 2005. The TPYF exhibition formed part of the Living Museum in St James's Park during Veterans' Awareness Week at the beginning of July. St James's Park received some 85,000 visitors, of which over a thousand people left their reflections and memories of the Second World War for inclusion in the project's Reflections Wall. Research commissioned to evaluate the response to the exhibition has provided very positive feedback. The full evaluation report is available on the project's website, and www.biglotteryfund.org.uk

After seeing the Their Past Your Future touring exhibition over 1000 people contributed their thoughts and tributes to the Reflections Wall at The Living Museum, July 2005

2 – Partners in Time
A collaboration between national and regional museums

Patners in Time is an outreach programme in partnership between IWM Duxford (lead museum), Norfolk Museums Services and Suffolk Museums. It has been jointly funded by the Department for Culture, Media and Sport (DCMS) and Department for Education and Skills (DfES). Groups have the opportunity to visit museums which they may not have considered visiting in the past due to lack of funds, lack of knowledge of the collections and perceived lack of relevance to their studies. This project focuses on areas of deprivation and is aimed at children of 5-18 years of age.

The objectives for the project are:

- To deliver activities supporting both History and Science and Technology elements of the National Curriculum by means of outreach and museum visits.
- To break down the barriers to participation to cultural life that are present or perceived for people who feel isolated due to their geographical, social, ethnic or economic origins.
- To create a commitment from schools to making more use of museums and to make this relationship sustainable.
- To raise levels of attainment in schools, some of which are in areas considered to be deprived according to national standards.
- To tackle rural isolation and low educational aspirations.

American Air Museum at Imperial War Museum Duxford which stands as a memorial to the 30,000 Americans killed while flying from bases in the UK during the Second World War. It is an award winning building, designed by Lord Foster

Leicester City Museums Service

1 – Leicester and Me

A programme of eleven events celebrating different heritages

This project, supported by the Heritage Lottery Fund and the European Regional Development Fund, was managed in partnership with the Friends of Leicester and Leicestershire Museums. It enabled this traditional supporters organisation to become involved in our work across a wide range of communities. A two-year programme of internal and outreach activities culminated in a 'Celebration of Cultures', a unique inter-cultural museum event, at which the steering group was represented: The Friends of Leicester and Leicestershire Museums Service, The Friends of Jewry Wall Museum, Guru Nanak Sikh Museum, The Refugee Sports Development project, Leicester Masaya Link Group, Pakistan Youth and Community Centre, the Chinese Community Centre, Highfields Youth and Community Centre, Leicester African Caribbean Arts Forum, Leicester Black History Season, The Beltane Spring Fayre Group.

Chinese calligraphy at the Leicester City Museums Service *Leicester and Me* project

2 – Engaging Refugees and Asylum Seekers

Supporting refugee and asylum seekers by facilitating access to museum services and learning opportunities

This project was developed in partnership with the National Museums of Liverpool, Tyne & Wear Museums and Salford Museums as part of the DCMS and DfES museums and galleries education programme which encouraged regional and national partnership working. Activities include school sessions, workshops, a conference, an exhibition and training sessions for museum staff, and refugees and asylum seekers now routinely attend many mainstream museum events. The project has so far worked with over 700 refugees and asylum seekers. Further funding has been secured from the Baring Foundation (until October 2007) and from the DCMS/DfES (until March 2007).

Drama workshop,part of the Leicester City Museums Service *Engaging Refugees and Asylum Seekers* project

3 – My Story My Leicester

A travelling exhibition for community venues

Funding was secured from Leicester's Neighbourhood Renewal Fund to develop transportable cases and an exhibition to tour the most deprived neighbourhoods in the city. The first exhibition, showing the different festivals celebrated in the city, was developed Belgrave Neighbourhood Centre's elders group working with a local primary school. The cases have so far toured seven neighbourhoods. They are on show at sports centres, libraries and schools, and a programme of events is held at each venue working with local schools and elders groups.

National Gallery

1 – Line of Vision

Line of Vision: A multi-phased creative art programme for Looked after Children (teenagers).

Line of Vision started three years ago and to date has involved partnerships between the National Gallery and seven London social services departments, a consultant Art Therapist and professional artists. Experienced participants are encouraged to mentor those visiting for the first time, and in the instance of one young person, this role has led to a full-time job as Youth Participation Worker for Waltham Forest Social Services. Others have been inspired to undertake Arts related formal education courses.

Young people, all from children's homes or foster families, participating in one of the National Gallery's *Line of Vision* workshops

2 – The Raphael exhibition

A major exhibition leads to significant 'export' benefits

Raphael exhibition: This was the first major exhibition of paintings and drawings by the great Renaissance painter Raphael to be held in Britain, and indeed the most comprehensive showing of his paintings ever held anywhere. The Gallery's Communications department worked successfully to generate extensive media coverage of Raphael as the 'must-see' event for autumn 2004, raising the profile of both the Gallery and London itself as a major destination for the arts. There was also excellent exposure on radio and TV, including BBC 10 o'clock News and Channel 4 news as well as inclusion in Channel 5's popular show '*Tim Marlow on…*' and a documentary on BBC1 entitled *Raphael: A Mortal God*.

Attendance figures for the exhibition totalled 231,000, including around 40,000 visitors from overseas: a vital contribution to sustaining tourism in a period of international uncertainty, and particularly impressive as the exhibition ran over the winter months outside of the peak tourist season. These attendance figures demonstrate the popularity of the exhibition, but an Economic Impact Survey carried out by MEW Research goes further and suggests that a large number of these visitors would not otherwise have come to London. The survey indicated that for 59% of all visitors Raphael was the main reason for making their trip to London that day.

The Raphael exhibition at The National Gallery

Natural History Museum (NHM)

1 – SYNTHESYS

International collaboration and research on the natural world

In 2004, 20 European natural history museums and botanic gardens, led by the Natural History Museum, London were successful in securing a multi-million EU funded grant, called SYNTHESYS. This five-year grant comprises two parts which together aim to create an integrated European infrastructure for researchers in the natural sciences.

Part 1 – Access: enables researchers based in Europe to access the earth and life science collections, facilities and taxonomic expertise at 20 institutions in 11 countries.

Part 2 – Networking Activities: focused on creating a single 'virtual' museum service:

Complementarity brings together information on the strengths of each institution's collections and expertise, leading to a coordinated European development plan.

Standards sets standards for the long-term preservation and access to the collections, and will assess the collections to identify priorities for improvement through mechanisms such as training courses.

Databases coordinates the development of collection databases across Europe to create an integrated, European collection system.

New collections (such as tissue samples for molecular study) establishes common policies and methodologies.

New analytical methods assesses techniques from other disciplines, such as the use of the medical imaging technique of CT (Computed Tomography) scans, and assess how they might be applied to natural history.

A SYNTHESYS visitor from Spain using the Natural History Museum Analytical Imaging Facilities

2 – Ground-breaking minerals research

International cooperation and exchanges with emerging economies

The Centre for Russian and Central Asian Mineral Studies (CERCAMS) at the Natural History Museum, London, serves the international mineral deposits community as a centre for research into geodynamics and metallogenesis. The Centre pursues cutting edge research into mineral deposits through grant-funded doctoral, post-doctoral and academic researchers. CERCAMS has attracted funding from several industry Patrons. Patronage payments support short-term research fellowships visits to the NHM by colleagues from Russia, Kazakhstan and Mongolia. These collaborations result in research papers, reports, maps and other outputs which are vital to the emerging economies of the region. Major research projects on ore deposits are underway and expert fieldtrips and workshops are regularly organised. CERCAMS has led to a significant increase in contract income for mining consultancy and effective interaction with academic partners in Russia and Central Asia.

Exploration geologists in the open pit of the giant Muruntau gold deposit, Kyzylkum, Uzbekistan, at an expert trip guided through CERCAMS

National Museums Liverpool (NML)

1 – Sculpture Conservation Technologies (SCT)

Selling skills and promoting knowledge

SCT been formed from National Museum Liverpool's department of Sculpture Conservation and Laser Technology who have developed their research and commercial activities with the assistance from DCMS (Public Sector Research Exploitation grant). Conservation Technologies has developed core activities of laser cleaning, laser scanning and non-contact replication to improve best practice in the field of monuments and sculpture conservation. They have developed laser training courses, haptic interactive systems as well as new products using artefacts from museum collections. Conservation Technologies partners include councils, other museums, government bodies as well as national and international organisations and private collectors with the added benefits of knowledge transfer, income generation, accessibility to NML's collections and publicity which raises the profile of NML and its departments.

National Museums Liverpool: Up Close at the Lady Lever Art Gallery

2 – Liverpool Slavery Remembrance Initiative
Connecting a city to its history

This initiative is a partnership of National Museums Liverpool, Liverpool City Council, and individuals from the local black community. The partnership promotes Slavery Remembrance Day on 23 August each year, and the need for improved opportunities to learn about the Transatlantic Slave Trade and address its contemporary legacy, whether through schools or adult and community learning programmes. As a result, Slavery Remembrance Day has now been adopted as an annual civic event in Liverpool. This is very closely associated with the development of the International Slavery Museum, the UK's major physical legacy of 2007 and the 200th anniversary of the abolition of the British slave trade, a celebration of international importance.

Norfolk Museums & Archaeology Service (NMAS)

1 – The Imagine Outreach Project
Working with young children

The Imagine Outreach Project, initiated by Norfolk Museums & Archaeology Service at the Ancient House Museum Thetford in 2000, was a two-year project which supported innovative museum outreach work with young children in the Thetford area, with funding from the Heritage Lottery Fund (HLF). This imaginative work has been sustained with grant from the Sainsbury's Monument Trust to provide an ongoing educational programme, now under the auspices of the locally based Keystone Development Trust and in partnership with NMAS.

2 – Intangible Heritage
Working with young offenders

Great Yarmouth Museums working in partnership with the Seachange Trust and the Youth Offending Team delivered an HFL project in 2005 called 'Intangible Heritage'. As part of their Reparation Programme a group of young offenders participated in a filmmaking project focusing on the fishing industry. The participants carried out oral history interviews with older people and used the Time and Tide Museum as inspiration and as a research facility, producing an animation/film based on their oral history recordings and archive images.

National Museum of Science and Industry

1 – Locomotion

Promoting economic regeneration and tourism in the North East

The development of Locomotion, The National Railway Museum at Shildon will provide a reason for visiting Shildon and create a major new tourist attraction of national importance. The attraction will add to the critical mass of tourist attractions within the region, complementing other attractions in the area such as the Darlington Railway Museum and the Darlington to Bishop Auckland Heritage Line. This project will make a significant contribution to the economic regeneration of Shildon and build upon the work already carried out there by the Shildon SRB Partnership. The introduction of tourism within the town will assist to diversify the local economy and create jobs.

City of Truro visits Locomotion for its 2006 steam party event

2 – Creative Canals

Science and Industrial history for schools and communities

An educational project delivering to schools and community groups (60+ age groups and ESOL – English for speakers of other languages); 20 groups in all this year. The project is a partnership between the Science Museum, a floating classroom on the Regents Canal (Beauchamp Lodge Settlement) and the London Canal Museum. The programme includes a visit (with show) to the school or community group, a trip on the floating classroom, beginning with a visit to the Canal Museum, and a hosted visit to the Science Museum. Many of the adults and children involved in the Creative Canals project this year had never been on a boat or canal before. The project offered them the chance to experience their own locality from a new perspective and combine this with memorable learning opportunities.

Participants in the Creative Canals project on the floating classroom

Tate

1 – Sure Start

Working to deliver a government programme

Sure Start is a Government initiative that works to improve the quality of life for families with children under five. Sure Start works in designated high-deprivation wards across the country. Services are delivered by teams of professionals from Health, Education, Social Services and the voluntary sector. Tate Britain's unique Sure Start programme, Big and Small, uses Tate's Collection as a starting point for creative engagement and to improve early education for local children and families. Over five hundred local families from diverse social, ethnic and economic backgrounds have taken part in the weekly programme, which uses an extensive variety of artists' materials and provides real experiences through multisensory approaches learning across the early years curriculum. The programme is devised by a team of artists and educators at Tate Britain alongside the skills and expertise of the South Westminster Sure Start team.

Tate Britain, Sure Start – Making surrealist costumes in the Paris Experiment Display 2006

2 – A Picture of Britain

A major series of television programmes

A Picture of Britain, developed by BBC producers and Tate Britain curators comprised a Tate Britain exhibition and major BBC programming – the centrepiece of which is a landmark six-part BBC One series presented by David Dimbleby. It explored how the British landscape has inspired artists for three hundred years and how these artists have come to define how we view the landscape.

Tyne & Wear Museums

1 – 'Clued Up'

Working with refugees and asylum seekers

'Clued Up' was part of the national and regional museum education partnership programme (funded by DCMS and DfES) to engage with Refugees and Asylum Seekers in Sunderland.

A key element of 'Clued Up' was the production of a DVD produced by young refugees who took part in weekly film making sessions led by a documentary film maker. During the process the young people learnt techniques of lighting, editing and scriptwriting and decided on the content of their film. Their aim was to produce a film for other local young people that illustrated what it is to be a refugee or asylum seeker in Sunderland. They filmed discussions that took place over a meal between refugees and asylum seekers about their situations, what they have left behind and their feelings about being in Sunderland.

The film was launched at Sunderland Museum and Winter Gardens in 2005 in partnership with the Youth Participation Team in Sunderland. The film is being used by Sunderland City Council to take into schools and show to local children for discussion about issues of asylum and community integration. The North East Refugee Service (NERS) is also using the film as part of its community integration work. The film is shown during monthly awareness-raising training with community groups in Sunderland. NERS has commented during evaluation that because it is set in Sunderland it has an immediate impact for discussion with local people.

A young actress being filmed for 'Clued Up'

2 - PlayTyne Gallery
A project for the under sevens

PlayTyne is an interactive water play gallery designed specifically for 7-year-olds and under. Based on model of the River Tyne basin, the water tank features opening bridges, lock gates and cranes and was created to provide a space for young families and nurseries where children could learn through play.

Since opening, the Gallery has been in regular use by family visitors and organised nursery and reception school groups. The area has been used for storytelling sessions and it was used as the focus for a major family project called 'Flapjack the Pirate'. Flapjack was created in 2004 during family learning week; children used PlayTyne as an inspiration to create a story and artwork which is now displayed in the gallery. PlayTyne has also inspired many water-themed family holiday activities as well as regular pirate days and craft activities.

Visitors enjoying the PlayTyne Gallery

3 – Social Impact of Museums
Identifying the opportunities for social impacts

This project was led by Tyne & Wear Museums (TWM) with collaboration from Bristol's Museums Galleries & Archives (BMGA) and support from the North East Museums Libraries and Archives Council (now MLA North East). This project investigated demonstrable social impacts of the work of museums.

The study comprised three main elements:

1. A literature review of recent published material relating to impact measurement and evaluation.

2. An analysis of audience data collected by TWM and BMGA between 1998 – 2003 as part of a Group for Large Local Authority Museums (GLLAM) benchmarking exercise.

3. Post-evaluation of 7 TWM/BMGA projects/programmes that took place between 1999 and 2004.

Post-evaluation took the form of focus group sessions and interviews with people who took part in the original projects. The results indicated that museums can have a social impact and these results are feeding in directly to national initiatives including the development of a new set of Generic Social Outcome indicators by MLA.

Tord Boontje installation for 'Brilliant' exhibition, V&A Museum, 2004

Victoria and Albert Museum (V&A)

1 – Brilliant: promoting contemporary design

Connecting designers, makers and the public to promote design

Brilliant, the V&A exhibition of contemporary lighting (Feb-Apr 2004) exerted considerable influence and initiated fruitful relationships between the museum, designers, design students, manufacturers and clients. It generated many sales for the participating designers and helped to launch emerging practitioners: for example, Sharon Marston, who makes individual works to commission, reckoned it led to at least two years' worth of work. The curator was consulted by the organisers of several subsequent design events, such as the 100% East Design Festival and the British Council for their touring exhibition of contemporary lighting, and contributed to design student projects/works at the Royal College of Art and Buckinghamshire Chilterns University. Students of the latter turned lighting into performance art by creating wearable lighting for, and on, visitors to a V&A Friday Late event. Brilliant exemplified the V&A's aim of connecting designers, makers and the public at the cutting edge of contemporary art and design.

2 – Vivienne Westwood

Promoting British creativity to the world

Vivienne Westwood's clothes are often overtly influenced by historical costume, a result of her study of collections at the V&A (and other museums) – not just costume collections, but also, for example, paintings and furniture. Her 'Cut and Slash' collection of spring/summer 1991 was a result of studying 17th century costume at the V&A. She has also featured accurately-observed corsetry and 19th century men's tailoring. The V&A presented a major retrospective exhibition, *Vivienne Westwood* (April - July 2004: 171,000 visits), that has since toured to Canberra, Shanghai, Taipei, Tokyo, Dusseldorf and Bangkok and was visited by over half a million visitors worldwide. The exhibition will continue to tour to at least three further international venues in the US and Europe before being shown in Sheffield, making it a highly successful showcase for UK culture and the creative industries.

Vivienne Westwood poster on a tuk tuk taxi in Bangkok, Thailand (promoting the exhibition at Thailand Creative and Design Centre, Bangkok)

3 – BBC programmes on Modernism

Working with the BBC to promote an exhibition

As a result of research for the Modernism exhibitions (V&A, 6 April - 23 July 2006), BBC2 decided to produce a series of four programmes entitled "Marvels of the Modern World". The BBC's Development Department used the expertise of V&A Curators to 'pitch' the idea and, once it was accepted, V&A staff were regularly consulted by the producer and researchers to develop the story and write the scripts. Programmes aired from May 2006 while an exhibition is running at the V&A.

Amgueddfa Cymru – National Museum Wales

1 – On Common Ground

Engaging disadvantaged young people

On Common Ground, a social inclusion project aimed at 16-24 year olds in disadvantaged areas in communities across Wales, involved young people themselves addressing why this age group don't traditionally engage with heritage and museums. The participants were involved in designing a variety of initiatives to interest their peers in heritage and museums. The outputs included websites, videos, travelling displays, artwork, trails, and a publication 'Participatory Techniques for Use with Young People'. This guide, which was originally commissioned to train project participants, appears on the Dysg Website (counterpart to the Learning and Skills Development Agency in England; http://www.dysg.org.uk/research/project04.asp) and is now more widely used. More recently, with major funding from the European Social Fund and Heritage Lottery Fund, the emphasis of On Common Ground has shifted towards developing the skills of young people, encouraging and enabling them to access further education and/or work opportunities. The project is being subject to detailed external evaluation. http://oncommonground.co.uk

On Common Ground – 'Skools Out' and Antic Youth Theatre Project, Summer 2005

2 – Cyfoeth Cymru Gyfan: Sharing Treasures
A national partnership programme

National Museum Wales has a comprehensive Partnerships Programme involving other learning institutions, the tourism industry, commercial enterprises and, of course, the Museum's collections. The programme includes 'Cyfoeth Cymru Gyfan: Sharing Treasures', a pilot programme with Carmarthenshire Museum, Pontypool Museum, Wrexham Museum, Oriel Ynys Mon, and Brecknock Museum and Art Gallery. This programme is now being developed and in future CyMAL (Museums, Libraries and Archives Wales) plans to promote participation in the scheme as partners both to those venues taking part in the pilots and to other venues. Partners will be able to devise medium-term strategies to enable the improvement of presentation of the Museum's loan material. This will continue the promotion of high standards and a collaborative approach to presentation, and further enhance the availability of the Museum's loans.

Cyfoeth Cymru Gyfan: Sharing Treasures – Installation of objects from Amgueddfa Cymru – National Museum Wales' Japanware collection at Pontypool Museum

5 | LINKS BETWEEN MUSEUMS AND GALLERIES AND WIDER SOCIETY

In common with most public and semi-public institutions, museums and galleries have a wider role in society. That is, they engage with a number of institutions that are directly or indirectly concerned with what in recent years has come to be described as 'civil society'. The reasons for such engagement is relatively obvious, but has only recently been given any serious consideration. The think tank Demos, for example, has recently prepared a report on *Knowledge and Inspiration: the Democratic Face of Culture*.

In this publication, the authors argue "the sector [museums, libraries and archives] also facilitates political engagement, enabling the expression of new forms of identity through new channels and platforms". And also they enable "reflection across time, as well as geography, and give us the opportunity to think of contemporary issues afresh". Museums and galleries, it is stated, have become "ever more entrepreneurial" in providing people with the places and ideas where they can develop their identity.

To fulfil this wider civil society role, institutions have had to look outwards. Of course, many individual employees of museums and galleries have long played a full role in professional and expert bodies. But in recent years, there has been an increasing corporate willingness to take part in partnerships, networks, regeneration programmes, local promotional initiatives and an array of other activities. Importantly, museums and galleries have increasingly opened their doors to become 'civic space' where people can meet and develop ideas.

This report takes, as examples, a selection of civil society connections in four leading museums and galleries. It should be stressed that these institutions are used solely to demonstrate the width and depth of what is being done. Each of the selected institutions has provided information about partnerships, board memberships and other key linkages. The resulting lists suggest an incredible set of links and involvement with wider society. See the detailed list for each institution below.

The **Natural History Museum** has links to hundreds of institutions and professional bodies. Some of these are official or governmental bodies, while others are other museums. There is a good representation of British and overseas bodies. Apart from a small number of other national museums and galleries, and perhaps universities, it is difficult to imagine many other institutions maintaining so many formal and semi-formal links to other prestigious institutions. There are many links to regional museums.

National Museums Liverpool (NML) has a list of connections that looks dissimilar to those of the Natural History Museum, but which neatly demonstrates the very different focus of a major institution in a leading city outside the capital to one in London. Regeneration and renewal has been a key local, regional and national priority for Merseyside in recent years. The links between NML and the Mersey Partnership or Liverpool Biennial are evidence of the way in which the museum has been able to work with local authorities and other partners in rebuilding the local economy. Local and regional links with a range of cultural and business groups are also maintained by individual board memberships.

Norfolk Museums & Archaeology Service (NMAS) is different again, reflecting local needs and interests. East Anglia has different economic needs to, say, Merseyside, and the NMAS maintains different kinds of partnership links. Interestingly, a number of the links are with national institutions, suggesting an opportunity for the county to look outwards into the national community. On the other hand, local institutions are also seen as important. The museums and archaeology service is clearly a conduit through which ideas can flow from the national to the local level and vice versa.

The **Sheffield Galleries & Museums Trust**, like its Norfolk counterpart, provides national

Left: Royal Armouries, Leeds

and local linkages. Like Liverpool, Sheffield is a 'core city' with an extraordinary industrial past. Museums and galleries offer local people an opportunity to understand the rapidly changed industrial and economic geography of their area. They are also, through the Sheffield First Partnership Agency, part of the efforts to regenerate the city for a different future. The Trust also has many links to national and international bodies including partnership arrangements with the Victoria and Albert Museum, Tate and the National Portrait Gallery.

National museums are increasingly working with regional museums through strong partnerships, which go beyond the traditional approach of loans.

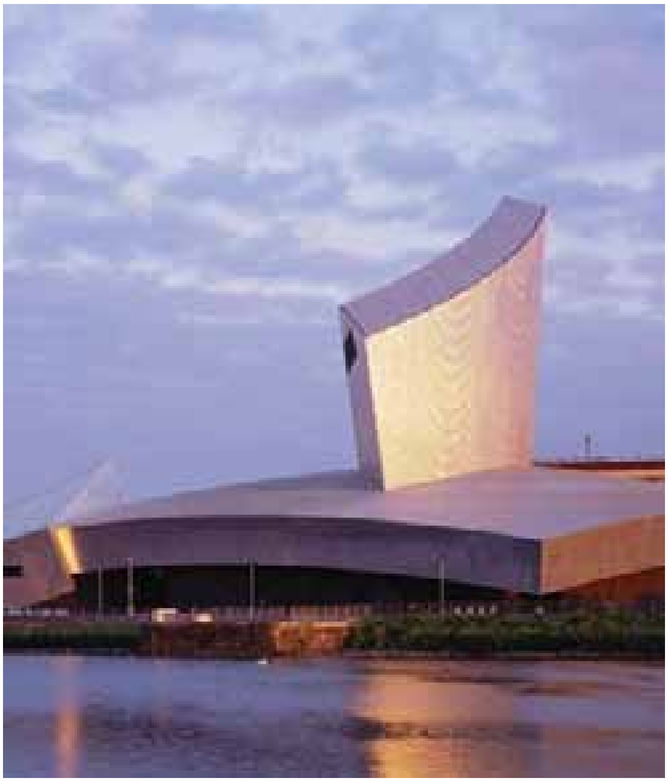
The national museums are increasingly working with regional museums through strong partnerships, which go beyond the traditional approach of loans. For example, Tyne & Wear Museums and Leicester Museums Service worked in partnership with the British Museum on the tour of *The Throne of Weapons*, a sculpture made from de-commissioned guns by a Mozambique artist and *Across the Board: Around the World in 18 Board games* an exhibition featuring the Lewis Chessmen and links board games from many countries. Details of *Engaging Refugees and Asylum Seekers*, a project developed in partnership with the National Museums of Liverpool, Tyne & Wear Museums and Salford Museums is included in the case studies. Leicester Museums Service have also hosted two major exhibition from the Victoria and Albert Museum: *Cinema India-The Art of Bollywood* and *Black British Style*. *Their Past Your Future,* a national initiative led by the Imperial War Museum developed a touring exhibition and provided funding for events and publicity to commemorate the 60th anniversary of the end of World War II. The exhibition was shown at Leicester's Abbey Pumping Station throughout September 2005 and had a significant impact on visitor figures there.

Another aspect of civic activity and partnership is the extent to which museums and galleries can reach out to audiences who, traditionally, have been under-represented within attendances. Museums and galleries are increasingly expected to improve their appeal to newer groups within society, to younger people and to the least advantaged. Many of the partnerships and links listed in this report will have had the effect of allowing museums and galleries to work with other bodies in the achievement of a number of social and educational objectives.

Above: The Madonna of the Pinks ('La Madonna dei Garofani') at the National Gallery

The success of leading museums and galleries in achieving the many good government or civil society objectives expected of them will depend, to some extent, on the resources available. In common with all cultural institutions heavily dependent on Whitehall or local authority funding, there is a risk that expectations for new initiatives or to reach new audience groups will exceed what can plausibly be achieved.

The fact that museums and gallery audiences are relatively easy to measure and monitor may have led to greater pressures being brought to bear on this sector than other parts of the arts and culture. Both DCMS and local authorities set targets for sponsored bodies. There remains a risk that a number of laudable 'good government' initiatives and developments of the kind discussed in this section will be threatened if, as seems likely, resources are put under pressure in the near future. Unless new forms of revenue can be found for museums and galleries, their civil society role could be eroded. At a time of significant societal change and uncertainty, the role of museums and galleries in underpinning civil society is surely pivotal.



Above: The impressive architecture of the Imperial War Museum North

Natural History Museum (selection only)

Partnerships

Jurassic World Heritage Coast Project
European Science Centre Network
World Health Organisation
Indentification Qualifications
MARBEF
European Network on Biodiversity Information
European 'Catalogue of Life' project
Eden Project
TRANSMAP
National Biodiversity Network

Board memberships

Air Pollution Research in London (APRIL)
American Entomological Institute
Ancient Human Occupation of Britain Project
Arts and Humanities Research Council
BioNet International
Biosciences Federation
Bird Exploration Fund
Botanical Society of the British Isles
British Bryological Society
British Classifictaion Society
British Entomological & Natural History Society
British Herpetolgocial Society
British Lichen Society
British Ornithologists' Club
Cetacean and Marine Turtle Group (DEFRA)
Darwin Initiative (DEFRA)
Earth Science Education Unit Committee
Entomological Society of Japan
European Association for Forensic Entomology
Forum for the History of Science, Technology and Medicine
GCG (Geology Curators Group)
Geological Curator's Group
Global Biodiversity Information Facility
Global Biodiversity Information Facility
International Association for Human Palaeontology
International Association of Meiobenthologists
International Bryozoology Association
International Foundation for Science, Stockholm
International Nannoplankton Association
John Spedan Lewis Trust for the Advancement of Natural Sciences
Kings College London, European Centre for Risk Management
Linnean Society of London
Malacological Society of London
Marine Biological Association, UK
Museums Association
NatSCA (Natural Sciences Collections Association)
Natural Sciences Collections Association
NERC Molecular Genetic Facilities
Percy Sladen Memorial Fund
Porcupine Marine Natural History Society
Powell-Cotton Museum, Birchington, Kent
Primate Society of Great Britain
Professor Hering Memorial Research Fund
Rotunda Museum, Scarborough
Royal Entomological Society
Society for Systematic Biology
South London Botanical Institute
SPNHC (The Society for the Preservation of Natural History Collections)
Suffolk Naturalists' Society
Systematics Association
The British Society for Parasitology
The Fleet Study Group
The Geological Society
The Micropalaentology Society
The Palaeontographical Society
The Palaeontological Association
The Ray Society
The Royal Society
The Royal Society of Tropical Medicine
The Society of Protozoologists
The Systematics Association
Tropical Biology Association
UK Saline Lagoon Working Group
UKRG (UK Registrars Group)
Unitas Malacologica
Willi Hennig Society
Windber Medical Research Institute, USA
World Association of Copepodologists
World Federation of Parasitologists
Yorkshire Geological Society
Zoologische Reihe, Mitteilungen aus dem Museum fur Naturkunde in Berlin

Other civil society links

Abergavenny Museum
American Museum of Natural History
National Museum of Australia (Australia)
British Museum
Californian Academy of Sciences
Canadian Museum of Nature
Charmouth Heritage Coast Centre (Charmouth Parish Council)
Chiba Natural History Museum and Institute (Japan)
Culture Division of the Iwaki City Board of Education (Japan)
Department for Environment, Food and Rural Affairs (Defra)
Dorset County Council
Dulwich Picture Gallery
Embassy of Japan
English Heritage
English Nature
Flemish Ministry of Culture
Gunma Museum of Natural History (Japan)
Hampshire County Council Museum Service
Haslemere Museum
Historic Royal Palaces
Heritage Lottery Fund (HLF)
HM Customs and Revenue
Humboldt Museum, Berlin
Hungarian Natural History Museum
Ibaraki Nature Museum (Japan)
International Council of Museums (ICOM)
Imperial War Museum
Jersey Heritage Trust
Kanagawa Prefectural Museum of Natural History (Japan)
Royal Botanic Gardens Kew
Kitakyushu Museum and Institute of Natural History (Japan)
Kyoto University – Faculty of Science (Japan)
Lake Biwa Museum (Japan)
Latvian State Authority on Museums
Leeds Museums and Galleries
Lyme Regis Development Trust
Lyme Regis Museum
Manchester Museum
MDA (the renamed Museums Documentation Association)
Missouri Botanical Garden
MLA
Museum of East Anglian Life
Museum of Tropical Queensland (Australia)
Museumvereniging (Dutch Museums Association)
National Army Museum
National Museum (Czech Republic)
National Museum of Ireland
National Museum of Kenya
National Museums and Galleries Wales
National Museums and Galleries, Merseyside
National Museums Scotland
National Science Museum (Japan)
National Trust
Naturalis
NEMO (Network of European Museum Organizations)
Natural History Museum of Los Angeles County (USA)
Okinawa Prefectural Museum (Japan)
Penlee House Gallery & Museum
Queensland Museum (Australia)
Romanian Ministry of Culture and Religious Affairs
Royal Ontario Museum
Sainsbury Centre for the Visual Arts at the University of East Anglia
School of World Arts and Museology at the University of East Anglia
Science Museum
Smithsonian Institution (USA)
Surrey Museums Consultative Committee
Swedish Museum of Natural History
The Tate Museum (in all its forms)
The Field Museum
The National Art Collection Fund
Tokyo University – Faculty of Science (Japan)
Towner Art Gallery
University of California – Berkeley
University of Cambridge – Sedgwick Museum of Geology
University of Oxford – Museum of Natural History
Victoria and Albert Museum
York Museums Trust
Royal Borough of Kensington and Chelsea
London Borough of Camden

National Museums Liverpool

Partnerships

Association of Leading Visitor Attractions (ALVA)
Wirral Consortium
John Moores Exhibition Trust and Foundation
Liverpool Biennial
Local Compact Groups
Local Sure Starts, Merseyside Network Group
The Mersey Partnership
Civic Trust
National Trust
National Association of Decorative and Fine Art Societies (NADFAS)

Board memberships

Culture NorthWest
International Icom Committee on Museum Management)
International Council of Museums - UK (ICOM-UK)
Mersey Tourism Board
Bluecoat Arts Centre
Merseyside Dance Initiative
The Mersey Partnership
Beatles Industry Group
St George's Hall
Liverpool Culture Company
Royal Liverpool Philharmonic Society
Mere Hall Conservation Association
Lakeland Arts Trust
Gower Street Estates
Chambre Hardman Trust
Pilkington Glass Collection Trust
West Derby Community Association
Linnean Society
Open Eye Photography
Heritage and Regeneration Committee
Liverpool Culture Company

Other civil society links

Aim Higher
Greater Merseyside
Institute of Popular Music, Liverpool
Mersey Volunteer Bureau
Merseyside Guild of Weavers
Local authorities (Liverpool, Sefton, Halton, Wirral, Knowsley, Cheshire)
Victorian Society

Norfolk Museums & Archaeology Service

Partnerships

South Midlands Museums
English Nature
English Heritage
Geological Society of Norfolk
Quarternary Research Association
British Geological Survey
Natural History Museum
Norfolk and Norwich Natural History Society
Norfolk and Norwich Archaeological Society
Victoria and Albert Museum (Costume and Textile Forum)

Board memberships

Ancient House Museum Thetford
Anglo Sikh Heritage Trail project
Maharajah Duleep Singh Centenary Trust
South Midlands Museums Federation
Museums Association
East Anglian Archaeology.
Osteoarchaeology Editorial Board
National Society for Church Archaeology
Norfolk and Norwich Archaeological Society
Ceramic Curators' Network
Ancient Hominid Occupation of Britain Project
Adu Dhabi Islands Archaeological Survey
United Kingdom Maritime Collections Strategy
Maritime Curators Group
Great Yarmouth Economic Forum : inteGREAT
Norfolk and Waveney Maritime Partnership

Other civil society links

Local authorities in Norfolk
The Prehistoric Society
Society for the Promotion of Roman Studies
Society for Medieval Archaeology
Society for Post-Medieval Archaeology

Sheffield Galleries & Museums Trust

Partnerships

Guild of St George
Sheffield City Council
Charity Finance Directors Group
Hawley Trust
Touring Exhibitions Group
Sheffield First Partnership Agency – Cultural Executive Group
Sheffield Cultural Forum
Visual Arts and Galleries Association (VAGA)
Campaign for Learning through Museums and Galleries
Heritage Lottery Fund
National Portrait Gallery
Victoria and Albert Museum
Tate

Board memberships

Heritage Lottery Fund (HLF)

Other civil society links

Group for Education in Museums (GEM)
National Institute of Adult Continuing Education (NIACE)
National Art Collection Fund
Canada House
Department for Culture, Media and Sport (DCMS)
Department for Education and Skills (DfES)
National Endowment for Science, Technology and the Arts (NESTA)
UK Registrar's Group
Museums Copyright Group

6 | THE INTERNATIONAL CONTEXT

Britain is one of a small number of countries with a significant number of internationally recognised museums and galleries. Few countries have the range and scale of institutions with the potential to provide a competitive advantage to a number of economic sectors, including tourism, universities, design and basic science.

National collections of this kind depend on a number of factors. Collecting habits and the interests of a small number of individuals is one key element. A country's history is a second. It is also important that a reasonably settled system of government has existed for a prolonged period, with the capacity for a society to preserve artefacts and other aspects of its heritage. There are also a number of less tangible factors such as a society's values and ambitions. For a number of these reasons, Britain has been gifted with very large and important collections.

In recent times, most countries have evolved cultural policies that seek to protect their heritage and also to project a national image. There are different approaches. In the US, for example, private philanthropy has been officially encouraged with tax breaks, public recognition and other instruments. In France, the State has invested heavily in a number of heritage and art forms so as to project an image of French culture and technology. Britain, predictably, has balanced somewhere between the often privately driven US model and the more publicly funded approach found in a number of European countries.

There is no 'right solution' to the question of how best to fund and govern museums and galleries. Moreover, international comparisons are often difficult to make because of uncertainties about ways of measuring or reporting particular numbers. But it is possible to make broad comparisons of the approaches adopted from place to place so as to allow judgements about the importance and dynamism of different arrangements. This section looks at Britain's museums and galleries in comparison with analogous institutions elsewhere.

Number and scale of institutions

British museums and galleries, as a sub-sector of the arts and cultural industries, appear to constitute a mass of institutions that are at least as significant as any other in the developed world. Indeed, because of Britain's relatively tight physical scale, there is probably no other country in the world with such a powerful museum and gallery cluster within such a relatively small space. In part, this finding is an accident of geography and history. Few countries in the world have so many big cities within such a small area.

Table 19 below shows data about number of visits for a selection of major museums and galleries in a number of countries, including Britain. Every effort has been made to ensure reasonable comparability.

The figures in the table on page 82 cover larger institutions in the countries shown. The only other countries with a significant number of institutions comparable with those in the table that would have over one and a half million visitors per year are probably Italy and China. There are also a number in the US for which no data are available.

What is clear from Table 19 (and Table 12) is the extraordinary number of museums and galleries with very heavy visitor numbers within the UK. Even before the advent of free admissions, the numbers of visitors at UK institutions appear to have been higher than in equivalent institutions elsewhere, but in the years since the removal of admission charges, UK visitor numbers have stepped up still further.

Of course, the national institutions included in Table 19 are only a proportion of major institutions and major regional museums within the UK (see also Table 12). Equally, there are many other museums and galleries in Britain and other countries. Recent research for the MLA suggests

Left: Africa Garden at the British Museum in collaboration with the BBC, Camden Council, Kew Gardens and the Eden Project that in total there are 1848 museums in the UK, compared with 1,180 in France, 6,501 in Germany and 15,460 in the US (MLA, 2006, page 139). Given the absence of reliable comparative statistics, it is clearly going to be difficult for governments and researchers to draw reliable conclusions about the effects of particular museum and gallery policies (in so far as these affect attendance) on aspects of economic competitiveness.

The British government's free museums policy was intended to encourage visitors, but also to widen access to groups who had not traditionally visited such institutions. Given the extraordinary scale of overall numbers attending museums and galleries (considered in more detail elsewhere in this report), there can be little doubt that Britain is at the top end of international access to the kinds of major institutions shown in Table 19. That is, the weight of numbers seeing the artefacts at the kinds of leading national museums and galleries considered in this report is almost certainly higher in Britain than in most – if not all – other countries.

the growth in public use of world class museums and galleries. The creative industries more generally are seen as the future for the British economy. In a speech made at the end of 2005, James Purnell the Minister for Creative Industries stated:

"In the last eight years, the creative industries have been growing by twice the rate of the rest of the British economy, creating three times as many jobs and exporting four times as many goods and services. People ask politicians where the jobs for the future will come from in an increasingly globalised world – part of the answer is the creative industries.

Yes, it's a challenge that Bollywood is now the biggest film industry in the world, in terms of sheer volume. Yes, it's true that South Korea has one of the best online content industries in the world" and a "more advanced broadband and a digital infrastructure of which most Western countries can only dream. But the UK's current strength in

Museums and galleries have been shown to be a significant factor in attracting visitors to the UK, but they will need to develop if they are to continue to compete against institutions that are developing in other countries.

There is, oddly, little research about the comparative advantage to a country of the kind of mass access to leading museums and galleries revealed in Table 19 and Table 12. The possibility of attributing monetary of value to the benefits of having cultural institutions is being attempted in a number of studies, for example the 'public value' calculations being made for the BBC as part of the Corporation's charter renewal process. But the international competitive benefits of culture and of 'soft' cultural diplomacy do not benefit from a significant research base.

Nevertheless, a number of government publications have suggested a number of potential competitive benefits that are likely to flow from

creative industries – and its willingness and ability to innovate – will continue to provide us with real opportunities".

Such benefits include straightforward balance-of-payments flows from inbound international tourism, but also improved design, enhanced creativity and the less tangible impacts associated with Britain's image abroad.

Broad estimates of the level of international visitor expenditure are included elsewhere in this report. There is little doubt that in Britain's mature tourism economy, new and repeat tourists will require an offer that includes both tradition and also evidence of continuous change. Museums and galleries have been shown to be a significant factor in attracting visitors to the UK, but they will need to develop if they are to continue to compete against institutions that are developing in other countries. Major cultural investments in museums/galleries in cities as diverse as Berlin, St Petersburg, New York and Denver mean that Britain will be less likely to attract affluent 'repeat' visitors unless its institutions are also moving ahead. Liverpool has been successful in recent years in turning investment in museums and galleries into part of a growing tourist sector.

The way that museums and galleries have collaborated with companies and educational institutions is considered elsewhere in this report. Designers and other creative workers draw inspiration and ideas from things they see in the collections held in regional or national museums. While it is possible to cite examples of how such transfers take place, it is difficult (probably impossible) to provide a robust quantitative analysis of they way a person translates an image or response into something that contributes to additional value added in a service or manufacturing.

But what is certain is that this capacity to evolve 'weightless' economic benefit is one of the keys to Britain's longer term prosperity. As developing economies become adept at sophisticated manufacturing, the older ones in Europe and North America will have to use their ingenuity and advantages to evolve new services and products that people in the rapidly growing countries will want to buy. While manufactured goods are, it would appear, relatively easy to copy and produce, creative products are virtually impossible to develop in the same way.

The stock held by major museums and galleries in Britain and a small number of other developed democracies is likely to be of incalculable benefit in the economic period that lies ahead. The easy access most British people have to the major institutions covered by this report means that the kinds of creative benefits generated by their holdings for the economy can potentially be exploited over time. But, for these benefits to be maximised, museums and galleries will need to be able to show and develop their collections in ways that are attractive in a competitive environment.

If the creative benefits of museum and gallery holdings are difficult to quantify, the benefits of 'soft' cultural diplomacy are even more difficult to measure. Thus, for example, when the Victoria and Albert Museum's *Vivienne Westwood* exhibition visited China during 2005, it will have helped strengthen Britain's image in that country. As the US has shown, it is possible for a country to have a very different official image (as represented by its use of military power and diplomacy) from that evolved by its culture (eg, rock music and the cinema). Countries such as Britain, France and Italy are probably in a similar position to the US, if less internationally exposed.

The stock held by major museums and galleries in Britain and a small number of other developed democracies is likely to be of incalculable benefit in the economic period that lies ahead.

Above: Tate Modern – Turbine Hall

Table 19: Visits to major museum and gallery numbers, Britain and overseas

		Visitor numbers (millions)
Britain	Amgueddfa Cymru – National Museum Wales	1.34
	British Museum	4.49
	Imperial War Museum	1.91
	National Gallery	3.95
	National Maritime Museum	1.51
	National Museum of Science & Industry	3.58
	National Museums Liverpool	1.61
	National Museums Scotland	1.43
	National Portrait Gallery	1.53
	Natural History Museum	3.31
	Tate	6.41
	Tyne & Wear Museums	1.57
	Victoria and Albert Museum	2.20
France	Cite des Sciences/La Villette	3.19
	Louvre	7.30
	Musee d'Art Moderne (Pompidou)	2.33
	Museum national d'Histoire naturelle	1.24
	Musee de l'Armee	1.07
	Musee d'Orsay	2.93
Germany	Deutsches Museum	1.40
	Staatliche Kunstsammlungen Dresden *	1.55
	State Museums Berlin Total *	4.67
	Art Galleries	2.67
Spain	Prado	2.28
	Reina Sophia	1.59
Russia	State Hermitage Museum	2.60

Table 19: continued

		Visitor numbers (millions)
USA	American Museum of Natural History	4.00
	Art Institute of Chicago	1.39
	J.Paul Getty Museum	1.30
	LA County Museum of Art	1.45
	Metropolitan Museum	4.57
	MFA Boston	1.00
	MoMA	2.47
	Smithsonian **	24.00
	National Air and Space Museum	6.10
	National Air and Space Museum's Steven F. Udvar-Hazy	1.20
	National Museum of American History	3.00
	National Museum of American Indian	2.20
	National Museum of Natural History	5.60
	Smithsonian Institution Building, 'The Castle'	1.30
New Zealand	Te Papa	1.26
Japan	National Museum of Modern Art	1.06
	National Science Museum, Tokyo *	1.20
	Tokyo National Museum	1.44

Notes: Figures are for 2005; table includes the institutions with the highest visitor figures in each country. For the UK these are the museums with over 1 million visitors per year

* 2004 figures (2005 figures unavailable)

** Combined visitor figures for all 19 Smithsonian museums (individual figures unavailable)

Source for international figures: AEA Consulting research for NMDC

Table 19 provides evidence of Britain's capacity to project its culture though a number of major institutions. Each of these museums and galleries (and the others covered by this report) has a large number of overseas visitors and is also able to take exhibitions to other countries.

The broad benchmarking made possible by the figures in Table 19 and from the MLA Cultural Spend and Infrastructure project suggest Britain's major museums and galleries are operating with levels of cost-effectiveness that are at least in line with those elsewhere. However, the concentration of world-class institutions in this country would appear to be greater than elsewhere, certainly if their visitor numbers are a guide. The 'hard' and 'soft' economic benefits of the sector are likely to become ever more important in the 21st century. Museums and galleries of the kind considered in this report are a key element in building productivity in this new economy.

There are other international statistics that suggest a need to increase Britain's international competitiveness. The numbers of people attending major international exhibitions in London show London performing relatively well in comparison with most other world cities, though well behind the levels of visitor attendance in New York. London has averaged about four million such visits in each year from 2000 to 2005, while the New York number is almost double that. Paris has generally been well behind London, but may be catching up.

Visitor numbers – International exhibitions

Source: The Art Newspaper, No 111 Feb 2001 World-Wide Exhibition Figures in 2000

The Art Newspaper, No 167 March 2006, Exhibition Attendance Figures 2005

Figures used are taken from the top 250 exhibitions worldwide in each year

Right: National Museum of Flight, Scotland

7 CONCLUSION

This report has analysed a major part of Britain's museum and gallery sub-sector. It has revealed a group of institutions that are among the very best in the world. The agglomeration of institutions, talent and audiences in Britain has parallels in only a few other countries. However, because it has grown up over many years, there is a risk the institutions will be taken from granted and not seen as the potential opportunity they represent.

their competitors has advantages in terms of speed and nourishment. Ingenuity and creativity will only go so far in overcoming a worsening lack of resources. There are also threats to researching, displaying and writing about collections.

Most British museums and galleries are funded in such a way that makes it hard for them to expend their income sources in line with growth in the wider economy. With limited access to admission

Museums and galleries offer both a major internationally traded service (by generating exports) but also underpin the creativity upon which future high value-added economic activity is likely to be based.

This opportunity derives from the rapidly changing nature of the global economy. Britain was first into the Industrial Revolution and has been one of the first countries to evolve a fully post-modern economy, with a significant dependence on traded services. There is little evidence to suggest that this country, or other highly developed ones, will not face continuing demands for economic flexibility and creativity in decades ahead.

Museums and galleries offer both a major internationally traded service (by generating exports) but also underpin the creativity upon which future high value added economic activity is likely to be based. The storehouses represented by these institutions will encourage people in this country to use their creativity and talent to develop new services, products and even manufactured goods. Nations without such repositories of inspiration have less chance of success.

But there are threats to Britain's position. Other countries, notably the US, have funding arrangements that continue to allow their collections to grow and develop. Britain's museums and galleries find themselves in a highly competitive race where at least one of

charges, modest opportunities to raise donations and grants/direct local government funding at best linked to the Retail Prices Index or the Consumer Price Index, income and expenditure is most unlikely to expand at the speed of most people's household incomes. There is a risk of deterioration for collections and the buildings that house them. There will certainly be no significant resources to add to collections.

Productivity improvements have been delivered by museums and galleries long before the government's recent Gershon initiative. Visitor numbers in recent years have risen faster than grants-in-aid and direct local government funding. Many institutions have become massive tourist businesses, though without the resources that such enterprises would normally enjoy. For example, museums and galleries are not allowed to borrow commercially to expand their activities: there are government imposed borrowing constraints. Institutions are required to be business-like without the freedoms of a proper business.

The optimism and enthusiasm of institutions' boards, directors, staff and 'friends' will hide the decline. As if to demonstrate the creativity that museums and galleries can propagate in others, many leading bodies have been able to open new facilities with one-off grants, have used buildings or artefacts to evoke a sense of progress and, more generally, have disguised the overall relative decline of their sector. Such a process cannot continue indefinitely with very limited resources.

But, to finish this report on an optimistic note, it is important to make clear that Britain's museums and galleries could, with a greater capacity to expand and improve, continue to allow this country to be a world leader in creativity and scholarship. To achieve this benign objective, investment and new resources will be required. It would be possible organically to build on existing success. The potential is virtually limitless. The only question is whether, collectively, there is a national desire to deliver, maintain and expand this particular creative sector.

Above: Visitors at the Science Museum, London

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About this report

National Museum Directors' Conference (NMDC)
The NMDC represents the leaders of the UK's national collections, including the national museums and galleries in England, Scotland, Wales and Northern Ireland, The National Archives, the British Library and the National Library of Scotland. It was founded in 1929, in anticipation of a Royal Commission recommendation that the national collections should 'coordinate their work and discuss matters of mutual concern'. Today the NMDC provides its membership with a valuable forum for discussion and debate and an opportunity to share information and work collaboratively. More information about NMDC can be found on our website at www.nationalmuseums.org.uk

Museums, Libraries and Archives Council (MLA)
MLA works with the nine regional agencies in the MLA Partnership to improve people's lives by building knowledge, supporting learning, inspiring creativity and celebrating identity. The Partnership acts collectively for the benefit of the sector and the public, leading the transformation of museums, libraries and archives for the future.

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Full list of venues of the museums and galleries included in this report

National Museums

Amgueddfa Cymru – National Museum Wales

Sain Ffagan: Amgueddfa Werin Cymry – St Fagans: National History Museum
National Waterfront Museum
Amgueddfa Lechi Cymru – National Slate Museum
Amgueddfa Lleng Rufeinig Cymru – National Roman Legion Museum
Amgueddfa Wlan Cymru – National Wool Museum
Amgueddfa Lofaol Cymru – Big Pit: National Coal Museum
Amgeuddfa Genedlaethol Caerdydd – National Museum Cardiff

British Museum

British Museum

Imperial War Museum

Imperial War Museum
Churchill Museum & Cabinet War Rooms
HMS Belfast
IWM Duxford
IWM North

Museum of London

Museum of London
Museum in Docklands
Mortimer Wheeler House

The National Archives

The National Archives
The Family Records Centre

National Gallery

National Gallery

National Maritime Museum

National Maritime Museum, Queen's House and Royal Observatory
National Maritime Museum Cornwall

National Museum of Science & Industry

Science Museum
National Railway Museum
National Museum of Photography, Film & Television
Science Museum Wroughton
Locomotion
Blythe House

National Museums Liverpool

World Museum Liverpool
Walker Art Galler
Lady Lever Art Gallery
Merseyside Maritime Museum
Museum of Liverpool Life
HM Customs and Excise National Museum
Sudley House
Conservation Centre

National Museums Scotland

National Museum of Scotland
Royal Museum
National War Museum
National Museum of Rural Life
National Museum of Flight
National Museums Collection Centre
National Museum of Costume

National Portrait Gallery

National Portrait Gallery
Montacute House
Beningbrough Hall
Bodelwyddan Castle

Natural History Museum

Natural History Museum
The Walter Rothschild Zoological Museum

Royal Armouries

Royal Armouries Museum
Tower of London National Collection of Arms and Armour
Fort Nelson

Tate
Tate Britain
Tate Modern
Tate Liverpool
Tate St Ives
Barbara Hepworth Museum and Sculpture Garden

Victoria and Albert Museum (V&A)
Victoria and Albert Museum
V&A Museum of Childhood
V&A Museum of Performance
Blythe House

Regional Museums

Birmingham Museums & Art Gallery
Birmingham Museum & Art Gallery
Aston Hall
Blakesley Hall
Museum of the Jewellery Quarter
Sarehole Mill
Soho House

Bristol's Museums, Galleries & Archives
Bristol City Museum and Art Gallery
The Red Lodge
Georgian House Museum
Bristol Industrial Museum
Blaise Castle House Museum

Hampshire Museums Service
Milestones Living History Museum
Aldershot Military Museum
Allen Gallery
Andover Museum and Museum of the Iron Age
Basing House
Bursledon Windmill
Curtis Museum
Eastleigh Museum
Gosport Museum
Havant Museum
Red House Museum
Rockbourne Roman Villa
SEARCH
Westbury Manor Museum
Willis Museum

Leicester City Museums Service
Abbey Pumping Station
Belgrave Hall Museum and Gardens
The Guildhall
Jewry Wall Museum
New Walk Museum and Art Gallery
Newarke Houses Museum

Norfolk Museums & Archaeology Service
Norwich Castle Museum and Art Gallery
Royal Norfolk Regimental Museum
Bridewell Museum
Strangers' Hall Museum
Gressenhall Farm and Workhouse
Time and Tide Museum
Elizabethan House Museum
Tolhouse Museum
Cromer Museum
Ancient House, Museum of Thetford Life
Town House Museum
Lynn Museum

Sheffield Galleries & Museums Trust
Millennium Galleries
Graves Art Gallery
Weston Park Museum
Bishops' House Museum

Tyne & Wear Museums
Discovery Museum
Arbeia Roman Fort and Museum
Hancock Museum
Laing Art Gallery
Segedunum Roman Forts, Baths and Museum
South Shields Museum and Art Gallery
Shipley Art Gallery
Stephenson Railway Museum
Sunderland Museum and Winter Gardens
Monkwearmouth Station Museum
Washington F Pit

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