

INTRODUCTION

DC Research was appointed in August 2016 by Arts Council England (ACE) to investigate whether and how Accreditation data returns can be used to answer the following research questions as part of ACEs contribution of evidence to the Department of Culture, Media and Sport's (DCMS) Review of Museums in England.

1. Over the past ten years how have the funding levels of Accredited Museums in England changed? Including changes to:
 - Funding from central government
 - Funding from local government
 - Funding from Arts Council England
 - Funding from the Heritage Lottery Fund
 - Funding from private investment and charitable giving (including business investment, individual giving and trusts and foundations)
 - Income generated from commercial activity
 - Any other sources of income
2. Over the past ten years how have the operating models of Accredited Museums in England changed?
3. How do changes in funding levels and operating models vary by type of museum? Covering the following museum types:
 - Local authority museums
 - Ex-local authority museums
 - Independent museums
 - Military museums
 - University museums
4. How do changes in funding levels and operating models vary by region? Covering the following regions: North East, North West, Yorkshire and Humberside, East Midlands, West Midlands, East of England, London, South East and South West.

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1 SCOPING DATA SOURCES

- 1.1 In terms of sourcing funding information from Accreditation data, museums are asked for museum specific accounts (income and expenditure) to be submitted as part of their Accreditation return, and whether the governing body has contracted a legally separate management organisation to manage the museum (if this is the case, then the museum is asked to provide this too). Beyond this, **museums are not asked to provide any further breakdown, or any other detail, in terms of finances and funding** because it is not necessary to do so for the purposes of assessing whether a museum should be Accredited or not.
- 1.2 In recognition that the usability of Accreditation data returns was likely to be limited, DC Research and ACE therefore agreed that the research would need to iteratively seek to develop answers to the research questions, using data from a range of sources. This would be done through:
- Seeking to address the research questions by selecting a sample of Accredited museums (which represents the different types of museums/regions of England).
 - Taking the Accreditation data returns for the sampled museums as the starting point of the analysis, and providing feedback in the report on what is possible/not possible at the moment using Accreditation data (with awareness that this may vary by museum type). It was recognised by both ACE and DC Research that not much may be achievable using Accreditation data returns.
 - Pursuing other data sources to work towards answering the research questions.
- 1.3 DC Research is most grateful to Liz Johnson, Cat Hammersley, Eloise Poole, Annette French and Charlene Price at ACE, and Fiona Talbott at Heritage Lottery Fund (HLF) for the data, advice and support they have provided to date.

Testing the suitability of Accredited Returns and investigating supplementary options

- 1.4 The **Accreditation Scheme**¹ sets nationally agreed standards for museums in the UK, defining good practice and thereby encouraging development. It is a baseline quality standard that helps guide museums to be the best they can be, for current and future users. Whilst it is a national standard, expectations vary for museums of different types, sizes and scopes.
- 1.5 There are currently more than 1,700 museums participating in the Scheme across the UK, and the Scheme is managed as a partnership between Arts Council England (ACE), the Welsh Government, Museums Galleries Scotland and the Northern Ireland Museums Council. This study concerns England only, which has around 1,300 Accredited museums².
- 1.6 Accredited Museums in England are required to provide ACE with data returns every three years. As a result, the Arts Council holds data returns going back a number of years and in different formats - earlier data returns are stored as scanned versions of paper documents whereas more recent data returns are stored on an electronic database. This information represents a mix of data - previously collected by MLA Council, which closed in 2011 and passed its museums functions to ACE, and currently (since 2011) collected by ACE itself using its online application portal.
- 1.7 The key early challenge for this study was establishing the extent to which the data held by ACE from Accreditation Returns is able to fully, or partially, answer the research questions. Following meetings with appropriate staff at ACE, and analysis of a mixed sample of Accreditation returns, it was established that:

¹ For more information, please see <http://www.artscouncil.org.uk/accreditation-scheme/about-accreditation>

² 1,306 as of June 2016

(http://www.artscouncil.org.uk/sites/default/files/download-file/Statistical_Report_2016_06_16_Accreditation.pdf)

- A top level summary of Accreditation information provides useful data in terms of **organisational structure**³, split by Charitable/Independent; Local Authority; University and National, and tiered by size. In addition, the move by some museums from Local Authority Governance to Trust Status is captured. It is also possible to look at some change over time following the inheritance by ACE of the Accreditation Scheme in 2011.
 - However, regarding **financial and funding analysis**, Accreditation returns do not provide the data required to answer research questions 1, 3, and 4 in any meaningful way. This is due to both the way in which this information is provided by the responding museums, and also how this information is processed once received by ACE.
- 1.8 As part of the assessment requirements museums are asked to provide evidence of financial accounting to show it is financially stable and meets the relevant financial regulations or standards and the requirements of its constitution. Museums are asked for museum specific accounts (actual final income and expenditure for previous two years) to be submitted, and where the governing body has contracted a legally separate management organisation to manage the museum, the museum is asked to provide additional accounts for the managing body covering the previous two years.
- 1.9 In terms of answering the research questions, there are therefore four barriers to using Accreditation financial data in this research:
- Fundamentally, financial data provided as part of the Accreditation process is requested to assess a museum's sustainability in terms of financial risk. Once this has been assessed by ACE, it is either noted as met, or more information is requested by the assessors. Beyond this, the data is not aggregated or summarised and is held either electronically (for more recent returns) or in paper form.
 - For organisations that run museums as part of a range of functions (such as Local Authorities), or who run more than one museum (such as larger trusts), individual museum finances are not identifiable. Indeed, often organisation wide accounts and budgets are submitted without any visible breakdown about museum specific financial data.
 - Museums and museum hosting organisations run different accounting policies and protocols (counting and allocating finances differently) and to different timescales (variances in financial years in independent/voluntary run museums).
 - Finally, frequency is also a factor, as Accreditation runs on a three year returns cycle with an assessment requirement to provide accounts for the last two financial planning periods.
- 1.10 A review of a sample of returns provided by ACE also highlighted a range in the quality of information provided, ranging from hyperlinks to organisational published accounts, copies of audited accounts and departmental budgets. None of these examples highlighted specific sources of funding, or amounts, as this is not what accounting reporting is designed to do.
- 1.11 To address this, a number of supplementary data sources were discussed and developed between ACE, the Heritage Lottery Fund (HLF), and DC Research to attempt to answer as many of the research questions as possible. These sources are:
- ACE revenue awards to Accredited museums in England.
 - Match funding noted by museums in applications for ACE awards.
 - HLF capital and revenue awards to accredited museums in England, provided by HLF.
 - Data from Museum Development Partnerships.

³Accreditation captures this information as 'governance type', defined as English Heritage, Independent, Local Authority, Ministry of Defence Funded, National Museum, National Trust, and University.

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- Data on museum and gallery funding by individual local authorities for 'museums and galleries'⁴.
- 1.12 Given that ACE hold usable data for their programmes (and not for legacy programmes managed by their predecessors in terms of museums), the time frame for analysis is 2011/12 to 2014/15.
- 1.13 ACE awards need to be treated in three distinct groups to enable analysis to fully capture awards made to museums rather than to partnerships, as the latter has the potential to distort distribution across some of the analytical categories:
- ACE awards under **Museum Resilience Fund, Designation Development Fund and Managed Funds Project** awarded to individual Accredited museums.
 - ACE awards made through regional **Museum Development Programmes**. ACE awards are made to a single museum or partnership, and are then distributed through awards or service delivery to individual Accredited museums. All nine MD programmes have provided data setting out, where possible, awards to individual Accredited museums in their regions.
 - ACE awards to **Major Partner Museums (MPMs)** are often awarded to partnerships and consortia of museums, contracting with a lead partner museum. ACE has provided a breakdown of funding proportions for each MPM award to ensure data on the award to individual museums is captured.
- 1.14 Table 1.1 shows the extent to which all of this data is able to answer the original research questions.

Table 1.1: Matrix of original research questions against data availability			
	Fully for 2011 to 2015	Partially for 2011 to 2015	Not possible to determine using available data
Over the past ten years how have the funding levels of Accredited Museums in England changed?			
Funding from central government			X
Funding from local government		X	
Funding from Arts Council England	X		
Funding from the Heritage Lottery Fund	X		
Funding from private investment and charitable giving (including business investment, individual giving and trusts and foundations)		X	
Income generated from commercial activity			X
Any other sources of income		X	
Over the past ten years how have the operating models of Accredited Museums in England changed?			
		X	
How do changes in funding levels and operating models vary by type of museum?			
Local authority museums	X		
Ex-local authority museums	X		
Independent museums	X		
Military museums		X	
University museums		X	
How do changes in funding levels and operating models vary by region?			
		X	
Source: DC Research, 2016 based on review of ACE Accreditation, Museum Awards data, and HLF Museums Award date 2011 to 2015			

⁴ <https://www.gov.uk/government/statistical-data-sets/local-authority-revenue-expenditure-and-financing-england-2014-to-2015-individual-local-authority-data-outturn>

2 ACCREDITATION RETURNS DATA ON TYPE, SCALE AND LOCATION

- 2.1 This section summarises Accreditation returns data on museum governance type, scale and location. Accreditation splits Independent, Local Authority and University museums into three 'scale' types based on assessments of workforce, management, operating budget, opening, learning offer, and visitor numbers⁵.
- 2.2 According to the most recent data collated and provided for this study by ACE in August 2016, there are 1,304 fully and provisionally Accredited museums in England. Table 2.1 summarises the distribution of Accredited museums in England by 'scale' in terms of operating budget bands using this typology.

Table 2.1: Distribution of Accredited Museums in England by governance 'scale'

Type	Count		%	
Independent - type one (less than £30,000 per year)	252	733	19.3%	56.2%
Independent - type two (£30,000-£250,000 per year)	305		23.4%	
Independent - type three (over £250,000 per year)	176		13.5%	
Local authority - type one (less than £100,000 per year)	50	349	3.8%	26.8%
Local authority - type two (£100,000, to £500,000 per year)	146		11.2%	
Local authority - type three (over £500,000 per year)	153		11.7%	
National museum	36		2.8%	
Nationally styled*	14		1.1%	
University - type one (less than £30,000 per year)	9	50	0.7%	3.8%
University - type three (£30,000-£250,000 per year)	17		1.3%	
University - type two (over £250,000 per year)	24		1.8%	
(blank)**	122		9.4%	
Total	1,304		100%	

Source: DC Research analysis of 2016 ACE Accreditation data, 2016, collated in August 2016 covering all English Accredited Museums.

Notes:

*Nationally-styled museums are museums which are not National Museums. They were not established by national legislation and are not significantly funded directly by central or devolved Government however they are marketed with a national name.

**Blanks are made up of a mix of National Trust, English Heritage and MOD funded museums.

- 2.3 Table 2.1 shows that over half of all Accredited museums in England are independent, with over a quarter being run by Local Authorities. Table 2.2 below, which presents the distribution by English region, shows that the South East has the most Accredited museums, followed by the South West. The North East has the least, followed by the East Midlands.
- 2.4 The number of museums is +/- five percent of population in all regions.

Table 2.2: Distribution of Accredited Museums in England by region

Region	2011 Population (000s)	%	Count of Accredited Museums	%
East	5,847	11%	160	12%
East Midlands	4,533	9%	99	8%
London	8,174	15%	137	11%
North East	2,597	5%	63	5%
North West	7,052	13%	140	11%
South East	8,635	16%	235	18%
South West	5,289	10%	193	15%
West Midlands	5,602	11%	135	10%
Yorkshire and the Humber	5,284	10%	142	11%
Total	53,013	100%	1,304	100%

Source: DC Research analysis of 2016 Accreditation Data, 2016; Office for National Statistics, Census 2011.

⁵ See http://www.artscouncil.org.uk/sites/default/files/download-file/FINAL_201406_GuidanceIntroduction_PrintFriendly.pdf, pages 16, 17 and 18 for full details.

- 2.5 The tables overleaf show the regional mix of Accredited Museums (Table 2.3), and the distribution by region of each type of Accredited museum (Table 2.4) by governance 'type'.
- 2.6 It is worth noting that many 'English Heritage', 'National Trust' and 'Ministry of Defence Funded' types are recorded as 'independent' in terms of the Accreditation 'scale' data presented in Table 2.1 above.
- 2.7 Table 2.3 shows the mix of museum type by region:
- The East (55%), South West (54%) and South East (52%) regions have the highest proportion of independent museums, with the North East (30%) and the North West (32%) the lowest.
 - The North West (39%), the North East (35%) and the East Midlands (34%) have the highest proportion of local authority run museums, with London having the fewest (16%), followed by the South East (21%) and the South West (23%).
 - Unsurprisingly, London has by far the highest proportion of national museums (16%), followed by the North West (8%).
- 2.8 Table 2.4 shows the distribution by region of each type of Accredited museum:
- The South East (20%), South West (17%) and East (14%) have the most independent museums.
 - Yorkshire and the Humber and the North West have the most local authority run museums (15%), followed by the South East (13%).
 - London has 50% of national museums in England, followed by the North West (25%) and the South East (11%).
 - The London, the South East and the East have the most university museums (all with 18%), followed by the North West (16%).

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Table 2.3: Regional Mix of Accredited Museums in England by 'type'

Type	East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber
English Heritage	2.5%	0.0%	3.6%	6.3%	2.1%	2.6%	1.0%	2.2%	4.9%
Independent	55.0%	50.5%	48.2%	30.2%	32.1%	52.3%	54.4%	48.9%	45.1%
Local Authority	27.5%	34.3%	16.1%	34.9%	38.6%	20.9%	23.3%	29.6%	38.7%
Ministry of Defence Funded	2.5%	3.0%	4.4%	4.8%	3.6%	6.8%	3.1%	3.7%	2.8%
National Museum	0.0%	0.0%	16.1%	1.6%	7.9%	2.1%	0.5%	0.7%	2.1%
National Trust	6.3%	11.1%	4.4%	12.7%	8.6%	11.1%	16.1%	11.9%	3.5%
University	6.3%	1.0%	7.3%	7.9%	6.4%	4.3%	1.6%	3.0%	2.1%
(blank)	0.0%	0.0%	0.0%	1.6%	0.7%	0.0%	0.0%	0.0%	0.7%
ROW Total %	100%	100%	100%	100%	100%	100%	100%	100%	100%
Total Count	160	99	137	63	140	235	193	135	142

Source: DC Research analysis of 2016 Accreditation Data, 2016

Table 2.4: Distribution by region of each type of Accredited museum by 'type'

Type	East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber	Total %	Total Count
English Heritage	11.8%	0.0%	14.7%	11.8%	8.8%	17.6%	5.9%	8.8%	20.6%	100%	34
Independent	14.1%	8.0%	10.5%	3.0%	7.2%	19.6%	16.8%	10.5%	10.2%	100%	626
Local Authority	12.1%	9.3%	6.0%	6.0%	14.8%	13.4%	12.3%	11.0%	15.1%	100%	365
Ministry of Defence Funded	7.7%	5.8%	11.5%	5.8%	9.6%	30.8%	11.5%	9.6%	7.7%	100%	52
National Museum	0.0%	0.0%	50.0%	2.3%	25.0%	11.4%	2.3%	2.3%	6.8%	100%	44
National Trust	8.0%	8.8%	4.8%	6.4%	9.6%	20.8%	24.8%	12.8%	4.0%	100%	125
University	18.2%	1.8%	18.2%	9.1%	16.4%	18.2%	5.5%	7.3%	5.5%	100%	55
(blank)	0.0%	0.0%	0.0%	33.3%	33.3%	0.0%	0.0%	0.0%	33.3%	100%	3

Source: DC Research analysis of 2016 Accreditation Data, 2016

- 2.9 A number of Accredited museums have changed their status from being under local authority control over a number of years to being part of an independent trust. ACE has tracked this transition over time, summarised by Table 2.5 below.

Table 2.5: Accredited Museums that have transferred from local authority to independent control					
Region	Pre 2004	2004-08	2009-11	2012-15	Total
East	2	-	2	1	5
East Midlands	-	-	-	5	5
London	-	-	-	1	1
North East	-	2	-	1	3
North West	-	1	1	5	7
South East	-	-	1	20	21
South West	-	-	1	2	3
West Midlands	-	2	9	3	14
Yorkshire and the Humber	4	-	-	1	5
Total	6	3	14	39	64

Source: DC Research analysis of Accreditation Data, 2016
Note: Data relates to individual sites

- 2.10 Table 2.5 shows that from 2009-11 onwards there has been a marked increase in Accredited museums transferring from local authority to independent status. However, this includes some large or very large services, with many Accredited sites, transferring during this time (such as Birmingham in 2009-11, and Derby, Hampshire and Carlisle in 2012-15). Typically, such transfers involved the management of the museum becoming independent, but the collections and the buildings remaining under local authority ownership.
- 2.11 Finally, disaggregating **Military museums** from the analysis of Accredited museum types given the available data is problematic, as most (but not all) museums will also be categorised by the formal Accreditation museum types unless they are funded by the Ministry of Defence. The data provided by ACE for this study shows that there are **52 Accredited museums that are recorded as Ministry of Defence** funded, of which 31% are in the South East, with 12% in both London and the South West.
- 2.12 In total, ACE reports that there are 63 military museums as of February 2016⁶.

⁶ http://www.artscouncil.org.uk/sites/default/files/download-file/Statistical_Report_2016-02-25_Accreditation.pdf

3 AWARDS TO ACCREDITED MUSEUMS, AND OTHER FUNDING SOURCES

3.1 This section sets out ACE funding awards to museums between 2011/12 and 2014/15.

ACE Awards to Museums

3.2 ACE awards under **Museum Resilience Fund, Designation Development Fund and Managed Funds Project** awarded to individual Accredited museums are set out in the Tables below, along with other income set against these awards as recorded in funding applications to ACE. Data covering 390 individual ACE awards to organisations were provided (covering Managed Fund Projects, Museum resilience fund grants, and Designation Development Fund grants) which were then distilled down to group organisations together, and isolate accredited museums to use in the calculations.

3.3 Table 3.1 presents **total value of ACE awards to individual Accredited museums**, excluding Museums Development and MPM awards⁷, between 2011/12 and 2014/15 by region.

Table 3.1: Total ACE awards made to individual museums between 2011/12 and 2014/15 by English region

	No. of Accredited Museums	%	Total	%
East	160	12%	£5,597,251	9.6%
East Midlands	99	8%	£7,134,422	12.3%
London	137	11%	£10,286,105	17.7%
North East	63	5%	£2,713,188	4.7%
North West	140	11%	£3,907,501	6.7%
South East	235	18%	£7,381,153	12.7%
South West	193	15%	£5,292,750	9.1%
West Midlands	135	10%	£7,455,075	12.8%
Yorkshire and the Humber	142	11%	£8,402,856	14.4%
Total	1,304	100%	£58,170,301	100.0%

Source: DC Research analysis of ACE funding data, 2016, n = 205

3.4 Table 3.1 shows that over the course of the entire study period Accredited Museums in London received the highest amount of funding in terms of ACE awards made (17.7%), although it should be noted that £3.525m of this investment was for Purchase Grant Fund⁸ awards to the Victoria and Albert Museum, which is then redistributed, and a further £360,434 was awarded to national museums to deliver nationwide Subject Specialist Networks⁹.

3.5 London is followed by Yorkshire and the Humber (14.4%), the West Midlands (12.8%), and the South East (12.7%).

3.6 In terms of comparing proportion of funding against proportion of museums:

- The South West has 15% of Accredited Museums, but 9% of funding to Accredited Museums, a difference of -6%, followed by the South East with a difference of -5%, and the North West with a difference of -4%.
- Conversely, London has 11% of Accredited Museums but receives 18% of funding to Accredited Museums, a difference of +7%, followed by the East Midlands with +4% and Yorkshire and the Humber with +3%.

3.7 Table 3.2 overleaf breaks down the funding information summarised above, to show the **proportion of awards made to each region, within each year**.

⁷ This is done for the reasons set out in paragraph 1.12. Data for Museum Development and for MPM awards are analysed separately later in this section.

⁸ <http://www.vam.ac.uk/info/the-ace-va-purchase-grant-fund>

⁹ <http://www.artscouncil.org.uk/supporting-collections-and-cultural-property/subject-specialist-networks>

Table 3.2: Proportion of ACE awards made in each English region in each year between 2011/12 and 2014/15

	2011/12	2012/13	2013/14	2014/15	Total
East	12.2%	8.5%	6.0%	13.2%	9.6%
East Midlands	22.4%	14.8%	2.9%	6.6%	12.3%
London	15.3%	13.0%	41.1*%	15.7%	17.7%
North East	2.2%	6.7%	1.7%	3.0%	4.7%
North West	2.9%	8.7%	5.8%	4.6%	6.7%
South East	10.0%	12.0%	10.6%	17.1%	12.7%
South West	6.1%	9.0%	10.3%	10.2%	9.1%
West Midlands	13.4%	10.9%	13.8%	16.4%	12.8%
Yorkshire and the Humber	15.5%	16.4%	7.8%	13.3%	14.4%
Total	£6,885,442 (100.0%)	£30,454,387 (100.0%)	£7,933,844 (100.0%)	£12,896,628 (100.0%)	£58,170,301 (100.0%)

Source: DC Research analysis of ACE funding data, 2016, n = 205

Note: *Much of this 41.1% consisted of £2.675m to the Victoria & Albert Museum for Purchase Grant Fund in 2013/14

3.8 Table 3.2 shows that the proportion of awards made to the different regions has remained relatively consistent over time, with the exception of some spikes or fluctuations in the intervening years. The East, London, North East, and North West having moved only slightly in relative terms (comparing proportions from 2011/12 to those from 2014/15). The East Midlands fell sharply in terms of proportion between the beginning and end of the study period (due to Derby Museums Trust and Nottingham City Council becoming an MPM partnership in 2013/14, and were therefore no longer in receipt of significant amounts of strategic funds), whilst the West Midlands, South East and South West rose moderately.

3.9 Table 3.3 below shows this funding data again, however in this instance it is presented by **type of museum**.

Table 3.3: Total ACE awards made between 2011/12 and 2014/15 by type of museum

	No. of Accredited Museums	%	Total	%
English Heritage	34	2.6%	£0	0.0%
Independent	626	48.0%	£25,082,359	43.1%
Local Authority	365	28.0%	£26,639,817	45.8%
Ministry of Defence Funded	52	4.0%	£371,108	0.6%
National Museum	44	3.4%	£3,958,263	6.8%
National Trust	125	9.6%	£88,000	0.2%
University	55	4.2%	£2,030,754	3.5%
(blank)	3	0.2%	£0	0.0%
Total	1,304	100.0%	£58,170,301	100.0%

Source: DC Research analysis of ACE funding data, 2016. Totals subject to rounding, n = 205

3.10 Table 3.3 shows that amount of funding from ACE awards is split relatively evenly between Independent and Local Authority museums over the course of the study period, with the latter being slightly higher overall at 45.8%. Local Authority and Independent museums were then followed by National Museums (6.8%)¹⁰ and by University museums (3.5%).

¹⁰ This consists of Purchase Grant Fund awards to the Victoria and Albert Museum, (£3.525m); £360,434 of Museum Resilience awards to Victoria and Albert Museum, The National Portrait Gallery, The British Museum and Tate Gallery for Subject Specialist Networks (SSNs), and a Designation Development Fund award of £72,829 to Sir John Soane's Museum.

- 3.11 In terms of comparing proportion of funding against proportion of museum types:
- The 48% of Accredited museums that are classified as independent in terms of type receive 43% of funding, a difference of -5%.
 - Conversely, the 28% classified as local authority in terms of type receive 45% of funding, a difference of +18%.
- 3.12 Table 3.4 takes the funding information and looks at the **trend over time, comparing the value of awards made to the different types of museums.**

Table 3.4: Proportion of ACE awards made to each type of museum in each year between 2011/12 and 2014/15

	2011/12	2012/13	2013/14	2014/15	Total
Independent	43.3%	37.3%	36.6%	60.8%	43.1%
Local Authority	56.7%	54.3%	21.3%	34.9%	45.8%
Ministry of Defence Funded	0.0%	1.0%	0.7%	0.0%	0.6%
National Museum	0.0%	3.0%	33.7%	2.8%	6.8%
National Trust	0.0%	0.3%	0.0%	0.0%	0.2%
University	0.0%	4.0%	7.6%	1.5%	3.5%
Total	£6,885,442 (100.0%)	£30,454,387 (100.0%)	£7,933,844 (100.0%)	£12,896,628 (100.0%)	£58,170,301 (100.0%)

Source: DC Research analysis of ACE funding data, 2016, n = 205

- 3.13 Table 3.4 shows that year to year, the amount of funding being awarded to the different types of museum has fluctuated substantially from year to year. Looking to the difference in the funding picture between the beginning and end of the study period, the table shows that the proportion of award amount made to Independent museums has increased, whilst for Local Authority museums it has fallen.

Other income matched against ACE awards to museums

- 3.14 The data presented in Table 3.5 through to Table 3.8 is taken from ACE information regarding income specified by applicant organisations in making applications for ACE funding awards. The categories which sit within other income include: earned income, local authority funding, other, other public funding, and private income. Data covering 260 individual other income amounts to 82 museums were provided which were then also distilled down to group organisations together, and isolate accredited museums to use in the calculations.

3.16 Table 3.5 shows the **proportional breakdown of total funding from other sources** which fell within each English region.

Table 3.5: Total other income reported as part of ACE award applications between 2012/13 and 2014/15 by region

	Percent	Total
East	5.5%	£235,392
East Midlands	2.4%	£104,193
London	15.6%	£671,247
North East	3.9%	£165,818
North West	5.1%	£218,301
South East	9.9%	£427,655
South West	19.7%	£845,656
West Midlands	30.2%	£1,299,613
Yorkshire and the Humber	7.8%	£33,5415
Total	100.0%	£4,303,290

Source: DC Research analysis of ACE funding data, 2016. n=82, Totals subject to rounding.

* for Tables 3.5 through to 3.8 two large funding amounts, well in excess of £1 million (recorded under the category of 'Other Public Funding') were removed when calculating this funding information as they had a substantial impact on the data.

3.17 Table 3.5 above shows that across the study period the West Midlands received the highest proportion of income from other sources, as specified within grant applications (30.2%). This was followed by the South West (19.7%) and London (15.6%). The lowest proportion of income from other sources fell within the East Midlands (2.4%).

3.18 Table 3.6 presents the same data but broken down by each year within the study period, to show the **proportion of income from other sources by region**, in a given year.

Table 3.6: Proportion of other income reported as part of ACE award applications by region, between 2012/13 and 2014/15

	2012/13	2013/14	2014/15	Total
East	4.1%	5.6%	17.4%	5.5%
East Midlands	2.1%	0.9%	13.5%	2.4%
London	22.1%	7.9%	0.7%	15.6%
North East	4.2%	2.6%	7.9%	3.9%
North West	4.7%	3.6%	16.5%	5.1%
South East	14.4%	4.2%	2.4%	9.9%
South West	22.8%	12.8%	30.1%	19.7%
West Midlands	12.9%	62.3%	4.4%	30.2%
Yorkshire and the Humber	12.7%	0.1%	7.2%	7.8%
Total	£2,470,050 (100.0%)	£1,555,339 (100.0%)	£277,901 (100.0%)	£4,303,290 (100.0%)

Source: DC Research analysis of ACE funding data, 2016, n = 82

3.19 Table 3.6 does not show any discernible trends in income from other sources, with substantial fluctuation year to year, and in comparing the start and end years of the study period.

3.20 Table 3.7 presents the same data again, but in this instance shows the **proportion of income from other sources by museum type**.

Table 3.7: Total other income reported as part of ACE award applications between 2012/13 and 2014/15 by type of museum

	Percent	Total
Independent	58.4%	£2,513,804
Local Authority	22.5%	£967,211
Ministry of Defence Funded	2.7%	£116,000
National Museum	0.0%	£0
National Trust	0.0%	£0
University	16.4%	£706,275
Total	100.0%	£4,303,290

Source: DC Research analysis of ACE funding data, 2016. n=82, Totals subject to rounding.

3.21 Table 3.7 shows that over the entire study period, Independent museums received a higher proportion of income from other sources (58.4%), as compared with other types of museum. Local Authority museums received the second highest proportion (22.5%), followed by University museums (16.4%). The awards made to national museums, as captured by Table 3.2, did not require partnership funding.

3.22 Finally, Table 3.8 presents the above income data, broken down by year, to show any trend in terms of **proportion of income from other sources by museum type by year**.

Table 3.8: Proportion of other income reported as part of ACE award applications by type of museum, between 2012/13 and 2014/15

	2012/13	2013/14	2014/15	Total
Independent	64.7%	54.8%	22.7%	58.4%
Local Authority	26.4%	6.6%	76.5%	22.5%
Ministry of Defence Funded	4.7%	0.0%	0.0%	2.7%
National Museum	0.0%	0.0%	0.0%	0.0%
National Trust	0.0%	0.0%	0.0%	0.0%
University	4.2%	38.6%	0.7%	16.4%
Total	£2,470,050 (100.0%)	£1,555,339 (100.0%)	£277,901 (100.0%)	£4,303,290 (100.0%)

Source: DC Research analysis of ACE funding data, 2016, n = 82

3.23 Table 3.8 shows that there is significant variance in the overall amount of other income each year, and its distribution in terms of museum type. There is no overall trend over time in terms of income from other sources for the different types of museum, with substantial fluctuations in the proportion of other income indicated for each type of museum.

Museum Development Funding Awards

3.24 ACE awards made through regional **Museum Development Programmes** are set out in the Tables below. ACE has funded two museum development programmes to date, summarised in Table 3.9:

Table 3.9: Museum Development Awards	
2012-15	2015-18
<ul style="list-style-type: none"> ▪ Bristol City Museum & Art Gallery & Archives; Plymouth City Museum & Art Gallery; Royal Albert Memorial Museum & Art Gallery; South West Federation of Museums & Galleries: £1,192,000 ▪ Herefordshire Heritage Services; The Marches Network: £832,000 ▪ Leicestershire County Council: £719,887 ▪ Manchester Partnership (with Cumbria Museums Consortium): £880,000 ▪ Museum of London: £650,190 ▪ Norfolk Museum & Archaeology Service: £1,141,000 ▪ Royal Pavilion & Museums, Brighton & Hove; HCC Arts & Museums; Chatham Historic Dockyard Trust; Oxfordshire County Museums Service: £1,400,000 ▪ Tyne & Wear Archive & Museums: £416,000 ▪ York Museums Trust: £840,000 	<ul style="list-style-type: none"> ▪ Bristol Museums, Galleries & Archives (BMGA) (South West): £1,429,668 for the South West Museums Development programme ▪ Ironbridge Gorge Museum Trust (Midlands): £908,928 for the West Midlands Museum Development programme ▪ Leicestershire County Council (Midlands): £918,141 for the Museum Development East Midlands programme ▪ Manchester City Galleries (North): £1,041,480 for the Museum Development North West programme ▪ Museum of London (London): £766,908 for the London Museum Development ▪ Norfolk Museums Service (South East): £1,249,776 for the Share Museums East programme ▪ Royal Pavilion & Museums, Brighton & Hove (South East): £1,656,900 for the South East Museums programme ▪ Tyne & Wear Archives & Museums (North): £463,932 for the Museum Development North East programme ▪ York Museums Trust (North): £995,544 for the Museum Development Yorkshire programme.
<p>Source: http://www.artscouncil.org.uk/funding/museum-development-grants-2015-18</p>	

3.25 As suggested by Table 3.9, Museum Development awards are made to a single museum or partnership, and are then distributed through either direct awards to museums, or by service delivery, to individual Accredited museums. **All nine MD programmes have provided data setting out, where possible, their actual awards in cash to individual Accredited museums in their regions.** Across the nine Museum Development bodies, data covering 935 individual awards were provided, which were used in the calculations for Museum Development funding.

3.26 Table 3.10 summarises the form of information provided by each Programme in terms of such awards (i.e. actual funds to museums rather than services provided by programmes). There was a mixed quality of response to a call for data from MD programmes, with only two providing details of awards by museum type. As a result, MD cash awards to Accredited Museums is presented by geography only.

3.27 The data received by each programme is set out in Table 3.10 below. The Table shows that there is only partial information in terms of awards made under the 2015-18 programme, so this has also been excluded in this analysis.

Table 3.10: Museum Development – summary of source information provided

Region	Format	Years covered	Information provided by	Annualised?	By Type?
East Midlands	Excel	2012-16	Applicant	No	No
East of England	Excel	2011/12 to 2014/15	Applicant	Yes	No
London	Excel	2012-15	Total	No	No
London	Excel	2015/16	Total	N/A	No
North East	Excel	2012-15, & 2015/16	Applicant	Yes	Yes
North West	Excel	2012/13 - 2016/17	Applicant	Yes	No
South West	Excel	2012/13 - 2016/17	Applicant	By grant decision date	No
West Midlands	PDF	2012/13	Applicant	N/A	No
West Midlands	Excel	2013/14	Applicant	N/A	No
West Midlands	Excel	2014/15	Applicant	N/A	No
West Midlands	Excel	2015/16	Applicant	N/A	No
Yorkshire	Excel	2012-15	Applicant	Yes	No
South East ¹¹	Excel	2012-15	Applicant	No	Yes

Source: DC Research, 2016 based on data provided by regional Museum Development Programmes

3.28 Table 3.11 sets out total **Museum Development awards in cash to museums by region for the 2012/15 programmes.**

Table 3.11: Total Museum Development awards, to museums, made in each region between 2012 and 2015

	2012-15 (Percent)	2012-15 (Total Value)
East Midlands	24.5%	£491,821
East of England	21.3%	£428,272
London	7.2%	£144,222
North East	5.0%	£100,683
North West	12.3%	£246,252
South East	19.1%	£382,627
South West	3.2%	£64,435
West Midlands	3.6%	£73,006
Yorkshire	3.7%	£74,991
Total	100.0%	£2,006,309

Source: DC Research analysis of Museum Development funding data, 2016

3.29 MD programmes can include a significant amount of service delivery to Accredited Museums. However, the data set out in Table 3.11 is cash awards to museums, and does not include such services or support in kind. Total programme for MD awards are set out in Table 3.9.

¹¹ An anomalous grant in excess of £1 million was removed from the South East dataset.

Major Partner Museum Funding Awards

3.30 Similar to Museum Development, MPM funding awards are often awarded to partnerships and consortiums of museums, contracting with a lead partner museum. ACE have provided a breakdown of funding proportions for each MPM award to ensure data on the award to individual museum is captured. ACE data covering the 25 current Major Partner Museums was used alongside data provided by the seven MPM Consortia, to provide data for a total of 35 organisations involved in the Major Partner Museums programme.

3.31 Table 3.12 summarises **MPM funding broken down by programme and by region.**

	MPM 12-15	MPM 12-15 (%)	MPM 15-18	MPM 15-18 (%)	Total	Total (%)
East	£8,414,273	13.5%	£7,973,772	11.7%	£16,388,045	12.6%
East Midlands	£0	0.0%	£2,562,198	3.8%	£2,562,198	2.0%
London	£6,942,558	11.1%	£6,140,034	9.0%	£13,082,592	10.0%
North East	£7,092,740	11.4%	£6,793,089	10.0%	£13,885,829	10.7%
North West	£8,352,666	13.4%	£7,928,472	11.7%	£16,281,138	12.5%
South East	£7,225,567	11.6%	£6,466,335	9.5%	£13,691,902	10.5%
South West	£8,478,280	13.6%	£9,324,120	13.7%	£17,802,400	13.7%
West Midlands	£7,382,793	11.8%	£7,889,196	11.6%	£15,271,989	11.7%
Yorkshire	£8,458,482	13.6%	£12,784,689	18.8%	£21,243,171	16.3%
Total	£62,347,358	100.0%	£67,861,905	100.0%	£130,209,263	100.0%

Source: DC Research analysis of Major Partner Museum funding data (from ACE and from MPM Consortia lead partners), 2016
Note: MPM funding breakdowns for Consortia MPMs based on funding data received, applied to award amounts in ACE data for consistency.

3.32 Table 3.12 shows that with the exception of the East Midlands (which did not have a MPM in the 2012-15 programme period) there was a relatively equal distribution of funding across the regions, with the South West and Yorkshire & The Humber receiving the highest amount of MPM programme funding (13.6%) and London the least (11.1%).

3.33 Table 3.12 shows a wider range of awards for the 2015-18 programme, with Yorkshire & The Humber receiving the most (18.8%), and the East Midlands the least (3.8%).

3.34 Table 3.13 overleaf presents this data in terms of the **annual proportion of MPM funding awarded to each region** from 2012/13 to 2017/18.

Table 3.13: Proportion of MPM funding awarded to each region between 2012/13 and 2017/18

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
East	13.6%	13.3%	13.6%	11.7%	11.7%	11.7%
East Midlands	0.0%	0.0%	0.0%	3.8%	3.8%	3.8%
London	11.9%	10.8%	10.7%	9.0%	9.0%	9.0%
North East	11.1%	11.4%	11.6%	10.0%	10.0%	10.0%
North West	13.1%	13.7%	13.5%	11.7%	11.7%	11.7%
South East	12.8%	10.9%	11.0%	9.5%	9.5%	9.5%
South West	14.2%	13.3%	13.3%	13.7%	13.7%	13.7%
West Midlands	11.5%	12.2%	11.9%	11.6%	11.6%	11.6%
Yorkshire	11.8%	14.5%	14.5%	18.8%	18.8%	18.8%
Total	£21,775,112	£20,536,537	£20,035,709	£22,620,635	£22,620,635	£22,620,635

Source: DC Research analysis of Major Partner Museum funding data (from ACE and from MPM Consortia lead partners), 2016
Note: MPM funding breakdowns for Consortia MPMs based on funding data received, applied to award amounts in ACE data for consistency.

3.35 Table 3.14 shows a summary of **MPM funding by museum type**.

Table 3.14: Summary of MPM funding cohorts by type of museum

	MPM 12-15	MPM 12-15 (%)	MPM 15-18	MPM 15-18 (%)	Total	Total (%)
Independent	£22,660,544	36.3%	£27,634,859	40.7%	£50,295,402	38.6%
Local Authority	£26,936,411	43.2%	£27,305,177	40.2%	£54,241,588	41.7%
n/a*	£482,131	0.8%	£920,827	1.4%	£1,402,958	1.1%
University	£12,268,272	19.7%	£12,001,042	17.7%	£24,269,315	18.6%
Total	£62,347,358	100.0%	£67,861,905	100.0%	£130,209,263	100.0%

Source: DC Research analysis of Major Partner Museum funding data (from ACE and from MPM Consortia lead partners), 2016
Notes:
 MPM funding breakdowns for Consortia MPMs based on funding data received from main partner, applied to award amounts in ACE data for consistency.
 *N/a indicates where funding was in certain instances, assigned to cross-organisational activities within consortia, and as such may not necessarily fit within one category (note, this did not apply to region, as partners within the aforementioned consortia sat within the same region).

3.36 Table 3.14 shows that over the total period, local authority museums have received the highest amount of MPM funding (41.7%), followed by independent museums (38.6%), and university museums (18.6%).

- For the 2012-15 programme, local authority museums received the most MPM funding (43.2%), followed by independents (36.3%) and university museums (19.7%).
- For the 2015-18 programme however, independent museums (40.7%) have narrowly overtaken local authority museums (40.2%), with university museums proportion of funding also falling (17.7%).

3.37 This data is presented in annualised form in Table 3.15.

Table 3.15: Proportion of MPM funding awarded to each type of museum between 2012/13 and 2017/18

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Independent	34.4%	37.6%	37.1%	40.7%	40.7%	40.7%
Local Authority	46.0%	41.8%	41.5%	40.1%	40.3%	40.3%
n/a	0.7%	0.8%	0.8%	1.4%	1.3%	1.4%
University	18.9%	19.7%	20.5%	17.8%	17.6%	17.6%
Total	£21,775,112	£20,536,537	£20,035,709	£22,620,635	£22,620,635	£22,620,635

Source: DC Research analysis of Major Partner Museum funding data (from ACE and from MPM Consortia lead partners), 2016

Notes:

MPM funding breakdowns for Consortia MPMs based on funding data received from main partner, applied to award amounts in ACE data for consistency.

*N/A indicates where funding was in certain instances, assigned to cross-organisational activities within consortia, and as such may not necessarily fit within one category (note, this did not apply to region, as partners within the aforementioned consortia sat within the same region).

Bringing ACE Awards together

3.38 The Tables overleaf bring this data together to show distribution of ACE awards by type and by region.

Table 3.16a: Total museums ACE awards made to individual museums between 2011/12 and 2014/15 by English region

	No. of Accredited Museums	% of Accredited Museums	Strategic Awards	Museum Development	MPM	Total	% of Total
East	160	12%	£5,597,251	£491,821	£8,414,273	£14,503,345	12%
East Midlands	99	8%	£7,134,422	£428,272	£0	£7,562,694	6%
London	137	11%	£10,286,105	£144,222	£6,942,558	£17,372,885	14%
North East	63	5%	£2,713,188	£100,683	£7,092,740	£9,906,611	8%
North West	140	11%	£3,907,501	£246,252	£8,352,666	£12,506,419	10%
South East	235	18%	£7,381,153	£382,627	£7,225,567	£14,989,347	12%
South West	193	15%	£5,292,750	£64,435	£8,478,280	£13,835,465	11%
West Midlands	135	10%	£7,455,075	£73,006	£7,382,793	£14,910,874	12%
Yorkshire and the Humber	142	11%	£8,402,856	£74,991	£8,458,482	£16,936,329	14%
Total	1,304	100%	£58,170,301	£2,006,309	£62,347,358	£122,523,968	100%

Source: DC Research analysis and aggregation of ACE funding data

Table 3.16b: Total museums ACE awards made to individual museums between 2011/12 and 2014/15 by museum type

	No. of Accredited Museums	% of Accredited Museums	Strategic Awards	Museum Development	MPM	Total	% of Total
English Heritage	34	2.60%	£0	MD awards to museums not available by type	£0	£0	0%
Independent	626	48.0%	£25,082,359		£22,660,544	£47,742,903	39%
Local Authority	365	28.0%	£26,639,817		£26,936,411	£53,576,228	44%
Ministry of Defence Funded	52	4.0%	£371,108		£0	£371,108	0%
National Museum	44	3.4%	£3,958,263		£0	£3,958,263	3%
National Trust	125	9.6%	£88,000		£0	£88,000	0%
University	55	4.2%	£2,030,754		£12,268,272	£14,299,026	12%
(blank)	3	0.2%	£0		£482,131	£482,131	0%
Total	1,304	100.00%	£58,170,301		£2,006,309	£62,347,358	£122,523,968

Source: DC Research analysis and aggregation of ACE funding data

Note: * Does not include Museum Development Programme awards to Accredited Museums

4 OTHER RELEVANT FUNDING SOURCES

4.1 There are two other sources of funding for Accredited museums when considering the original research questions for this study:

- **HLF awards to museums** made during the same time period, using data provided for this analysis by HLF.
- The **value of local authority expenditure on Museums and Galleries**, using publicly available data¹².

4.2 This section considers each of these sources in turn.

HLF Awards to Museums, and Partnership Funding

4.3 Table 4.1 below shows the **breakdown of HLF awards by region and by year to Accredited museums**. In considering this data, it is important to note that:

- Unlike the ACE data set out in section 3, HLF funds national museums, which serves to increase the amounts awarded to London museums.
- Analysis is of approved and completed projects only, those in the development stages are not included.
- This data is not annualised, which means the whole amount is recorded in the financial year of the initial award, resulting in marked peaks and troughs when making comparisons.

4.4 Overall, between 2011-12 and 2015-16 a total of £263.3 million was awarded by HLF to Accredited Museums across England. Over the entire time period, London received the highest value of awards (£127 million).

	2011-12	2012-13	2013-14	2014-15	2015-16	Total
East Midlands	£488,400	£407,500	£1,435,500	£265,800	£9,800	£2,607,000
East of England	£6,702,200	£8,574,700	£3,176,000	£1,582,000	£483,100	£20,518,000
London	£37,831,200	£46,549,100	£32,689,800	£8,346,700	£2,475,500	£127,892,300
North East	£1,314,300	£1,920,500	£1,128,100	£416,300	£82,800	£4,862,000
North West	£8,543,100	£9,076,800	£4,720,400	£1,399,900	£524,400	£24,264,600
South East	£4,124,100	£30,245,400	£4,652,300	£2,255,300	£1,022,900	£42,300,000
South West	£4,020,100	£6,910,300	£6,101,000	£508,600	£218,700	£17,758,700
West Midlands	£6,599,200	£2,395,500	£4,520,800	£736,000	£159,100	£14,410,600
Yorkshire and The Humber	£3,922,900	£1,659,500	£2,308,800	£319,300	£509,500	£8,720,000
Total	£73,545,500	£107,739,300	£60,732,700	£15,829,900	£5,485,800	£263,333,200

Source: DC Research analysis of HLF funding data, 2016

4.5 Table 4.2 overleaf presents the same data by proportion – with the percentages reporting the **proportion of the total value of awards for that year by region**. The dominance of London (in terms of receiving the highest proportion of awards) occurs in each year, with other regions lagging behind. Notable to this exceptions being where other regions have received 10% or more of the proportion of total funding in a year - the South East in 2012-13 (28%), the North West in 2011-12 (12%), the South West in 2013-14 (10%), East of England (10%) and the South East (14%) in 2014-15, and North West (10%) and South East (19%) in 2015-16.

¹² <https://www.gov.uk/government/statistical-data-sets/local-authority-revenue-expenditure-and-financing-england-2014-to-2015-individual-local-authority-data-outturn>

Table 4.2: HLF Awards – Proportion of Awards to Region by Year

	2011-12	2012-13	2013-14	2014-15	2015-16
East Midlands	1%	0.4%	2%	2%	0.2%
East of England	9%	8%	5%	10%	9%
London	51%	43%	54%	53%	45%
North East	2%	2%	2%	3%	2%
North West	12%	8%	8%	9%	10%
South East	6%	28%	8%	14%	19%
South West	5%	6%	10%	3%	4%
West Midlands	9%	2%	7%	5%	3%
Yorkshire and The Humber	5%	2%	4%	2%	9%
Percent Total	100%	100%	100%	100%	100%
Value Total	£73,545,500	£107,739,300	£60,732,700	£15,829,900	£5,485,800

Source: DC Research analysis of HLF funding data, 2016

- 4.6 Table 4.3 below shows the **breakdown of HLF awards by type and by year**. Overall, between 2011-12 and 2015-16 a total of £263.3 million was awarded by HLF to Accredited Museums across England, with Independent Museums receiving the greatest value (£111 million) over this time period.

Table 4.3: HLF Awards – Total Value of Awards by Type and Year

	2011-12	2012-13	2013-14	2014-15	2015-16	Grand Total
Independent	£37,944,600	£52,277,600	£15,991,300	£3,132,900	£1,956,700	£111,303,100
Local authority	£9,192,000	£10,590,000	£9,407,400	£1,884,800	£931,200	£32,005,400
Military	£3,698,200	£13,643,800	£951,200	£343,600	£87,100	£18,723,900
National	£20,190,200	£15,553,200	£30,022,800	£7,989,800	£2,090,400	£75,846,400
National Body		£88,700	£2,881,000		£10,000	£2,979,700
Other	£778,500	£1,616,200	£474,700	£1,174,900	£382,400	£4,426,700
University	£1,742,000	£13,969,800	£1,004,300	£1,303,900	£28,000	£18,048,000
Total	£73,545,500	£107,739,300	£60,732,700	£15,829,900	£5,485,800	£263,333,200

Source: DC Research analysis of HLF funding data, 2016

- 4.7 Table 4.4 below presents the same data by proportion – with the percentages reporting the **proportion of the total value of awards for that year by type of museum**. There is a changing pattern over time in terms of the type of museum receiving the highest proportions of funding. In 2011-12 and 2012-13 Independent Museums account for around half of all funding awarded by HLF (52% and 49% respectively). In subsequent years, National Museums received the highest proportion of funding awarded (49% in 2013-14 and 50% in 2014-15), whilst 2015-16 showed Independent Museums receiving 36% of funding awarded and National Museums receiving 38%. 2012-13 shows the greatest proportionate spread of awards across the different types of museums.

Table 4.4: HLF Awards – Proportion of Awards to Type of Museum by Year

	2011-12	2012-13	2013-14	2014-15	2015-16
Independent	52%	49%	26%	20%	36%
Local authority	12%	10%	15%	12%	17%
Military	5%	13%	2%	2%	2%
National	27%	14%	49%	50%	38%
National Body	0%	0%	5%	0%	0%
Other	1%	2%	1%	7%	7%
University	2%	13%	2%	8%	1%
Percent Total	100%	100%	100%	100%	100%
Value Total	£73,545,500	£107,739,300	£60,732,700	£15,829,900	£5,485,800

Source: DC Research analysis of HLF funding data, 2016

Partnership funding supporting HLF awards

4.8 Table 4.5 below shows the **breakdown of Partnership Funding (i.e. match funding) for HLF awards by region and by year**. Like the comparable data in Section 3, this contains funding that applicants have noted in applications as match funding amounts.

4.9 Overall, between 2011-12 and 2015-16 a total of £186.3 million of partnership funding was used by Accredited Museums across England to match HLF awards received, with London receiving the greatest amount of Partnership Funding over this time period.

	2011-12	2012-13	2013-14	2014-15	2015-16	Total
East Midlands	£140,785		£1,208,573	£92,211		£1,441,569
East of England	£9,164,919	£197,400	£1,447,094	£373,037	£118,094	£11,300,544
London	£64,683,118	£1,810,500	£57,140,791	£4,790,153	£875,876	£129,300,438
North East	£580,718		£580,695	£59,442	£20,644	£1,241,499
North West	£2,472,381	£620,800	£6,528,612	£438,050	£78,730	£10,138,573
South East	£2,142,817	£970,700	£2,551,669	£891,351	£437,933	£6,994,470
South West	£2,853,234	£196,700	£10,579,083	£362,152	£447,686	£14,438,855
West Midlands	£4,301,588	£129,600	£3,839,945	£224,108	£160,045	£8,655,286
Yorkshire and The Humber	£1,380,980	£89,300	£1,284,468	£21,700	£57,622	£2,834,070
Total	£87,720,540	£4,015,000	£85,160,930	£7,252,204	£2,196,630	£186,345,304

Source: DC Research analysis of HLF funding data, 2016

4.10 Table 4.6 below presents the same data by proportion – with the percentages reporting the **proportion of the total value of awards for that year by region**. The dominance of London (in terms of attracting the highest proportion of partnership funding) occurs in each year, most notably in 2011-12, 2013-14 and 2014-15 where it accounts for two-thirds or more of the total. 2015-16 shows a wider geographic spread proportionately, with both the South East and the South West accounting for around one-fifth of all Partnership funding.

	2011-12	2012-13	2013-14	2014-15	2015-16
East Midlands	0.2%	0.0%	1.4%	1.3%	0.0%
East of England	10.4%	4.9%	1.7%	5.1%	5.4%
London	73.7%	45.1%	67.1%	66.1%	39.9%
North East	0.7%	0.0%	0.7%	0.8%	0.9%
North West	2.8%	15.5%	7.7%	6.0%	3.6%
South East	2.4%	24.2%	3.0%	12.3%	19.9%
South West	3.3%	4.9%	12.4%	5.0%	20.4%
West Midlands	4.9%	3.2%	4.5%	3.1%	7.3%
Yorkshire and The Humber	1.6%	2.2%	1.5%	0.3%	2.6%
Percent Total	100%	100%	100%	100%	100%
Value Total	£87,720,540	£4,015,000	£85,160,930	£7,252,204	£2,196,630

Source: DC Research analysis of HLF funding data, 2016

4.11 Table 4.7 overleaf shows the **breakdown of Partnership Funding by type and by year**. Overall, between 2011-12 and 2015-16 a total of £186.3 million of partnership funding was used by Accredited Museums across England to match HLF awards received, with the National Museums accounting for the majority of this across the time period.

	2011-12	2012-13	2013-14	2014-15	2015-16	Total
Independent	£22,479,633	£2,364,800	£17,163,121	£1,117,929	£1,223,793	£44,349,276
Local authority	£7,233,599	£686,700	£4,440,041	£655,880	£248,205	£13,264,425
Military	£2,045,426	£424,500	£696,923	£318,100	£106,800	£3,591,749
National	£55,086,233	£17,600	£56,636,673	£4,649,196	£578,090	£116,967,792
National Body			£5,109,622		£460	£5,110,082
Other	£198,805	£63,200	£114,550	£105,799	£28,907	£511,261
University	£676,844	£458,200	£1,000,000	£405,300	£10,375	£2,550,719
Total	£87,720,540	£4,015,000	£85,160,930	£7,252,204	£2,196,630	£186,345,304

Source: DC Research analysis of HLF funding data, 2016

4.12 Table 4.8 below presents the same data by proportion – with the percentages reporting the proportion of the total value of awards for that year by type. The data shows a mixed picture between the National Museums and Independent Museums – with the Nationals accounting for two-thirds of the total in three of the five years presented (63% in 2011-12, 67% in 2013-14, and 64% in 2014-15), and Independent Museums accounting for the highest proportion in the remaining two years (59% in 2012-13 and 56% in 2015-16). Local authority Museums are consistently low by comparison, accounting for between 5% and 17% of total Partnership Funding across this time period.

	2011-12	2012-13	2013-14	2014-15	2015-16
Independent	26%	59%	20%	15%	56%
Local authority	8%	17%	5%	9%	11%
Military	2%	11%	1%	4%	5%
National	63%	0%	67%	64%	26%
National Body	0%	0%	6%	0%	0%
Other	0%	2%	0%	1%	1%
University	1%	11%	1%	6%	0%
Percent Total	100%	100%	100%	100%	100%
Value Total	£87,720,540	£4,015,000	£85,160,930	£7,252,204	£2,196,630

Source: DC Research analysis of HLF funding data, 2016

Local Authority Funding of Museums and Galleries

4.13 Table 4.9 overleaf shows the total value of local authority Museums and Galleries gross expenditure between 2010-11 and 2014-15, in total and broken down to regional level. Overall, there has been a decrease in total funding between 2010-11 and 2014-15 of £45 million – a decrease of 16% as a proportion of the 2010-11 value.

4.14 The regions that consistently record the highest proportion of gross spend across all years are the South East, West Midlands, the North West, and Yorkshire & the Humber.

4.15 Looking at proportionate change over time for each region – i.e. breaking down the overall 16% decrease to the regional level, shows that the regions reporting the largest decreases are the East Midlands (-24%), the South West (-23%), West Midlands (-18%), London (-17%) and the North East (-18%) – all of which show a decrease above the national average. In contrast, the regions reporting the smallest decreases are the East of England (-4%) and the South East (11%).

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Table 4.9: Local Authority gross museums and galleries expenditure between 2010/11 and 2014/15 by region

	2010/11 (000s)	%	2011/12 (000s)	%	2012/13 (000s)	%	2013/14 (000s)	%	2014/15 (000s)	%	% Change
East	£25,602	9.0%	£24,126	9.5%	£25,291	10.4%	£25,016	9.8%	£24,644	10.2%	-4%
East Midlands	£28,608	10.0%	£25,214	9.9%	£24,356	10.0%	£24,449	9.6%	£21,746	9.0%	-24%
London	£27,930	9.8%	£24,196	9.5%	£15,406	6.3%	£23,192	9.1%	£23,293	9.7%	-17%
North East	£17,490	6.1%	£15,249	6.0%	£14,487	5.9%	£14,795	5.8%	£14,432	6.0%	-18%
North West	£37,144	13.0%	£34,067	13.3%	£31,428	12.9%	£34,832	13.7%	£31,490	13.1%	-15%
South East	£44,093	15.4%	£36,898	14.5%	£38,393	15.7%	£40,258	15.8%	£39,158	16.3%	-11%
South West	£29,394	10.3%	£26,477	10.4%	£25,109	10.3%	£23,957	9.4%	£22,638	9.4%	-23%
West Midlands	£38,452	13.5%	£37,537	14.7%	£35,775	14.7%	£35,980	14.1%	£31,522	13.1%	-18%
Yorkshire & the Humber	£36,781	12.9%	£31,525	12.3%	£33,755	13.8%	£31,841	12.5%	£31,670	13.2%	-14%
Grand Total	£285,494	100.0%	£255,289	100.0%	£244,000	100.0%	£254,320	100.0%	£240,593	100.0%	-16%

Source: DC Research analysis of Local authority revenue expenditure and financing England (DCLG), 2016

Table 4.10: Local Authority gross museums and galleries expenditure in each region per head of population (2011 Census)

	2011 Population	2010/11	2011/12	2012/13	2013/14	2014/15	Change	% change
East	5,847,000	£4.38	£4.13	£4.33	£4.28	£4.21	-£0.16	-4%
East Midlands	4,533,200	£6.31	£5.56	£5.37	£5.39	£4.80	-£1.51	-24%
London	8,173,900	£3.42	£2.96	£1.88	£2.84	£2.85	-£0.57	-17%
North East	2,596,900	£6.73	£5.87	£5.58	£5.70	£5.56	-£1.18	-18%
North West	7,052,200	£5.27	£4.83	£4.46	£4.94	£4.47	-£0.80	-15%
South East	8,634,800	£5.11	£4.27	£4.45	£4.66	£4.53	-£0.57	-11%
South West	5,288,900	£5.56	£5.01	£4.75	£4.53	£4.28	-£1.28	-23%
West Midlands	5,601,800	£6.86	£6.70	£6.39	£6.42	£5.63	-£1.24	-18%
Yorkshire & the Humber	5,283,700	£6.96	£5.97	£6.39	£6.03	£5.99	-£0.97	-14%
Grand Total	53,012,400	£5.39	£4.82	£4.60	£4.80	£4.54	-£0.85	-16%

Source: DC Research analysis of Local Authority revenue expenditure and financing England (DCLG), 2016; Office for National Statistics, Census 2011.

Note: Whilst mid-year estimates could be used as an alternative, Census data is used to allow for a consistent denominator over the time period for analysis to control for regional size.

- 4.16 Finally, Table 4.10 sets out local authority spend in each region per head of population from 2010/11 to 2014/15. In 2010/11, Yorkshire & The Humber had the highest per capita spend by local authorities on museums and galleries (£6.96), with London the lowest (£3.42).
- 4.17 The East Midlands has experienced the biggest fall over this time period (-24%), followed by the South West (-23%) and then the North East and the West Midlands (-18%). There is little relative change in terms of ranking, with the exception of the South West dropping from 5th to 7th, and the South East rising from 7th to 5th. Yorkshire & The Humber still has the highest per capita spend by local authorities on museums and galleries (£5.99), with London still has the lowest (£2.85).

5. OBSERVATIONS AND IMPLICATIONS

- The East (55%), South West (54%) and South East (52%) regions have the highest proportion of independent museums, with the North East (30%) and the North West (32%) the lowest.
- The North West (39%), the North East (35%) and the East Midlands (34%) have the highest proportion of local authority run museums, with London having the fewest (16%), followed by the South East (21%) and the South West (23%).
- London has 50% of national museums in England, followed by the North West (25%) and the South East (11%).
- From 2009-11 onwards there has been a marked increase in Accredited museums transferring from local authority to independent status. This includes some large or very large services, with many Accredited sites, transferring during this time.
- Between 2012 and 2015, Accredited Museums in London received the highest amount of funding in terms of ACE number of awards to individual museums (17.7%), followed by Yorkshire and the Humber (14.4%), the West Midlands (12.8%), and the South East (12.7%)
 - However, more than a third of awards to London consist of awards to national museums that in turn make awards to, or support, museums nationwide¹³. If these awards to nationals were removed from this analysis, London would sit 5th behind Yorkshire and the Humber, the West Midlands, the South East and the East Midlands.
- In terms of type, the amount of funding from ACE awards to individual museums is split relatively evenly between Independent (43.1%) and Local Authority museums (45.8%) over the same period.
- Independent museums received a higher proportion of income from other sources (58.4%). Across both ACE and HLF data, independent museums were the strongest museum type in terms of leveraging other funding to match funding awards.
- Museum Development programmes awarded just over £2m in cash to Accredited museums between 2012 and 2015.
- In terms of Major Partner Museums, there was a relatively equal distribution of funding across the regions (with the exception of the East Midlands which did not have a MPM in the 2012-15 programme period). The South West and Yorkshire & The Humber received the highest amount of MPM programme funding (13.6%) and London the least (11.1%).
- The 2012-15 programme, local authority museums received the most MPM funding (43.2%), followed by independents (36.3%) and university museums (19.7%). For the 2015-18 programme however, independent museums (40.7%) have narrowly overtaken local authority museums (40.2%), with university museums proportion of funding also falling (17.7%).
- Overall, ACE has invested £123.5 million in Accredited Museums between 2011/12 and 2014/15. The regional breakdown of this funding is broadly (+/- five %) similar to the number of Accredited museums in each region, with 39% being awarded to independent museums, and 44% to local authorities.
- Between 2011-12 and 2015-16 a total of £263.3 million was awarded by HLF to Accredited Museums across England¹⁴. Over the entire time period, London received the highest value of awards (45%). 42% was awarded to independent museums, 12% to local authorities and 29% to national museums.
- Local authority funding to museums and galleries has seen a decrease of 16% as a proportion of the 2010-11 value. The regions reporting the largest decreases are the East Midlands (-24%), the South West (-23%), West Midlands (-18%), London (-17%) and the North East (-18%) – all of which show a decrease above the national average

¹³ £3.525m of this investment was for Purchase Grant Fund awards to the Victoria and Albert Museum, which is then redistributed, and a further £360,434 was awarded to national museums to deliver nationwide Subject Specialist Networks

¹⁴ HLF data includes capital investment and funding to national museums, and is not annualised.

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Overall, the process of pulling together meaningful data and analysis on ACE funding awards in cash to Accredited museums has highlighted a number of areas for further work.

- There is a need for more work to be done to look at all sector delivered grant schemes to ensure that they can be analysed in the same way. This would be greatly aided by a common unique record number that applies to each museum and is used in every instance of ACE, or ACE funded programme, engagement with that museum (and in theory it could be extended to all funders who use Accreditation as a funding criteria).
- Currently, ACE is missing an opportunity in terms of its use of the data generated by Accreditation Returns both as management information, and also to support policy development and sector analysis. For example, in addition to requesting copies of accounts, if the returns were able to ask for annual turnover and the proportion of this turnover from different sources, meaningful metrics around viability and sustainability could be developed for the sector as well as for individual museums. An audit of the management information potential of Accreditation could identify a small group of core indicators that could be developed without significantly adding to the overall process, and greatly limit the need for separate queries being made by ACE and by others to museums.
- There are gaps in this analysis in terms of the type of museum that have been awarded funding by Museum Development programmes, and variance in the quality of the data provided to the research team in this regard. Whilst this is in great part a result of the timescale in which this data was requested, it is not unreasonable to expect funded programmes to be able to identify how much money has been awarded, and to whom, as and when this is requested by the funder.

DC Research

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