

Museum and public funding

DECREASE IN PUBLIC FUNDING ?

A worldwide answer
from Museums

International Research
Alliance on Public Funding
For Museums (IRAPFM)



ICOM

international
council
of museums

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Public Funding for Museums
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LEAD PARTNER

Chair on Museum Governance and Cultural Law – Université du Québec à Montréal

Lisa Baillargeon : Co-Director, UQAM

Yves Bergeron : Director, UQAM

Michèle Rivet : Lead Scientific Director

Camille Labadie : Research Coordinator

Léa Le Calvé : Research Coordinator

Heidi Weber : Research Coordinator

INTERNATIONAL EXPERTS

For Africa : Catherine Snel (Sanlam Archive and Museum, South Africa).

For Asia : Yang Jin, assisted by Ma Jinwen, Jia Yutong, Hou Zelin, Tan Zhongyan, Liu Nianqing (Shaanxi University, China).

For Europe : Xavier Roigé, assisted by Alejandra Canals Ossul (Universitat de Barcelona, Spain).

For Latin America and the Caribbean : Luciana Menezes de Carvalho assisted by Luciene Pereira da Veiga Givisiez and Luiza Henriques Costa Pereira (UNIRIO, Brazil).

For North America : Marc Lajoie, assisted by Lisette Carine Pedraza-Cala (Musée national des Beaux-Arts du Québec, Canada).

For Oceania : Conal McCarthy, assisted by Anna Abernethy (Victoria University of Wellington, Aotearoa/New Zealand).

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Executive Summary

Overview

The International Research Alliance on Public Funding for Museums (IRAPFM) has conducted a comprehensive study on the state of public funding for museums worldwide, highlighting the critical financial challenges facing these vital cultural institutions and the innovative strategies they adopt in response to a research project generated by ICOM-IMREC, the international research and exchange partnership established by ICOM and Shanghai University. This report, spearheaded by the Université du Québec à Montréal (UQAM) and supported by a global consortium of experts, offers a detailed analysis of funding trends, their impacts, and museums' responses to them across different world regions. Additionally, the report proposes targeted calls for action to address these challenges, support the sustainability of museums and identify key areas for future research'.

Key Findings

- **Decline in Public Funding :** The study reveals a global decline in public funding for museums, exacerbated by the 2008 financial crisis and the COVID-19 pandemic. This reduction in funding has led to significant operational challenges, including staff layoffs, reduced programming, and delayed projects. Notably, even when budgets remain nominally stable, inflation and increased responsibilities result in a real decrease in available funds.
- **Shift to Self-Financing and Hybrid Models :** Museums are increasingly turning to self-generated revenues and hybrid funding models that combine public and private sources. This shift is driven by the need to offset the instability of public funding and ensure financial sustainability. Governments are exerting pressure on museums to generate their own revenue, leading to a rise in self-financing efforts.
- **Digital Transformation and Community Engagement :** The pandemic has accelerated digital initiatives, with museums developing online platforms, virtual tours, and digital exhibitions. Strengthening community engagement through outreach and educational programs has also become a crucial strategy for maintaining relevance and attracting local funding.
- **Regional and Institutional Disparities :** There are significant disparities in funding between countries, as well as between national and smaller-scale museums. National museums often receive more stable funding, whereas smaller institutions struggle to compete. The varied types and themes of museum institutions also influence the level of funding they receive, some themes attracting more financial support than others.
- **Increasing Competition :** The expansion of the heritage field and the multiplication of private museums have intensified competition for funding. Public museums are at a

disadvantage compared to private museums, leading to a two-tiered funding system. This increased competition pressures museums to innovate and diversify their revenue streams.

- **Cultural Diplomacy :** Governments often overlook the critical role museums play in cultural diplomacy. Enhanced recognition and support for museums' contributions to cultural diplomacy could improve funding and operational stability.
- **Impact of New Definitions and Responsibilities :** The new ICOM definition of museums, which includes broader responsibilities such as inclusivity and sustainability, has added pressure on museums to adapt and expand their missions. This expansion necessitates additional funding and resources, further straining financial capabilities.

Proposed Calls for Action

1. **For Museums :** Insofar as possible, diversify funding sources by integrating private donations, corporate sponsorships and revenue-generating activities. Embrace digital tools and community-focused initiatives to build a loyal visitor base and increase financial resilience.
2. **For Governments :** Implement multi-year grants adjusted for inflation, provide resources for digital transformation and ensure equitable funding across museums of different statuses. Enhance transparency in funding allocation to reduce disparities and support the long-term planning of museums. Recognize and support museums' role in cultural diplomacy.
3. **For ICOM :** Advocate for increased and equitable public funding for museums globally. Develop guidelines and best practices for museums to enhance their self-financing capabilities and resilience. Promote the importance of museums in cultural diplomacy and support their efforts in expanding digital and community engagement initiatives.
4. **For Civil Society :** Actively advocate for museums at all levels of government, support museum associations, and participate in museum activities. Civil society's involvement is crucial for sustaining museums' educational and cultural missions.

Conclusion

This report highlights the critical need for a sustainable financial framework for museums globally. By implementing diversified funding strategies, embracing digital transformation, promoting community engagement, and advocating for greater support, museums can navigate financial uncertainties and maintain their essential role in cultural preservation and education. This report also underscores the need for further research to ensure museums' resilience and sustainability in an evolving financial landscape. The growing financial pressures and competition call for a unified effort to support museums in their expanded roles and responsibilities.

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The IRAPFM wishes to express special thanks to ICOM-IMREC for generating, managing and financing this study.

This Report expresses the views of IRAPFM and does not engage ICOM-IMREC.

Foreword

As Chair of the Academic and Programming Board of ICOM-IMREC and Head of the Steering Committee overseeing this research project into museums and public funding, it gives me great pleasure to write the foreword for the final report of this project.

Public funding has been in decline in many parts of the world for nearly two decades. Gaining momentum following the global financial crisis of 2007/8 and growing to a crescendo during and after the Covid pandemic, these declines have put considerable pressure on the current and future sustainability of the sector.

The problem has been forcefully brought to ICOM's attention through three research initiatives conducted over the last 5 years. In 2018, a survey sent to ICOM National and International Committees as part of a mid-term strategic planning exercise revealed that the decline in public funding was the most pressing concern facing the sector. Three surveys conducted during Covid exposed the vulnerability of museums without public funding and, when a survey of the membership was conducted as part of research for the ICOM Strategic Plan 2022-8, funding was again found to be the most important issue of concern for the global museum community.

However, although there is a growing literature on the subject, the true range and extent of the problem has remained elusive. In part, this is because much of the published material has been generated in specific regions of the world or has focused on the situation particular to one nation. In addition, successive world crises and their aftermath have tended to focus attention on a particular time-period rather than encouraging a longitudinal view of progressive patterns of decline.

Responding to these concerns, ICOM-IMREC wanted to interrogate and bring some clarity to this subject on behalf of the global museum community. It prepared a research brief highlighting five major questions:

- What does the term 'public funding' currently encompass and how is the term understood across the globe?
- Is declining public funding for museums a global phenomenon?
- Where, to what extent and what kind of declines are occurring?
- With what impact? and
- In areas where reductions are occurring, how are museums responding? Are there discernible trends emerging from new business models?

We sought expressions of interest from consortiums willing to explore how public funding is evolving and what this means for museums. We found a like-minded partner in the IRAPFM (International Research Alliance on Public Funding for Museums) led by the University of Quebec at Montreal assisted by a global consortium of museum researchers representing each of the major regions of the world.

The result of their research over the last 18 months is a report which is a significant addition to the growing body of research on this subject.

It provides evidence that, even taking regional differences into account, declining public funding for museums is a global phenomenon with significant implications for the world-wide museum sector. It is one of the first studies to trace the trajectory of funding decline over nearly two decades and map how this progressive decline in traditional sources of income is creating an unpredictable funding universe further exacerbated by geopolitical tensions and the energy crisis. It encourages us to interrogate the language we use, providing nuanced insights into how the term ‘public funding’ is evolving and addressing the increasingly fluid boundaries between notions of ‘public’ and ‘private’ museums which has important implications for the very definition of the term ‘museum’ and the allocation of resources.

Importantly, it reveals the resilience of museums as they develop innovative ways of generating other sources of income and generate new funding models.

Finally, one of the great strengths of this report is the breadth and extent of regional comparisons which locate the problem of funding within the different political and policy contexts within which museums are operating and illustrates the many ways in which they are responding.

The first section discusses the findings of a quantitative survey which explored the situation pre, during and post pandemic. It highlights the volatile and evolving nature of public funding in the last two decades bringing multiple impacts and challenges. Section two takes a deep-dive into these impacts and challenges with special attention to the ways in which museums across six regions of the world are responding through new business models and innovative ways of resource-building. Looking ahead, the financial challenges facing museums are discussed in section three. The increasingly complex pattern of funding required for on-going sustainability, the imperative to be selective about programme choices in the absence of resources and the challenges inherent in balancing financial necessity with ethical considerations are discussed in detail. Proactive advocacy to ensure the sustainability of the museum sector is the subject of the final section which contains recommendations for action by the museum sector, by museum associations, by civil society and by government.

Public funding is a necessary component if the vitally important contributions that museums make to public value are to be sustained. This report is a call to action; one which, as a sector, we cannot ignore.

Carol A. Scott
Chair of the Academic and Programming Board
ICOM-IMREC

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INTRODUCTION

An overall assessment of museum funding : some preliminary reflections

Museum funding

According to UNESCO (UNESCO 2020; 2021), there are between 95,000 and 104,000 museums worldwide, with a wide variety of business models and funding sources. Within this diversity, there are three types of logics structuring museum funding: the market logic, the public subsidy logic and the donation logic (Mairesse 2022). Museums can generate independent revenue by relying on sources such as entrance fees, shops, and space rentals. Second, museums can receive public funds, which include operational and project-specific subsidies, as well as fiscal resources. Public funding can be direct or indirect and comes from different levels of government (states, provinces, regions and cities). Third, museums can turn to individual or collective patrons to bolster their funding. Friends of museums and fundraising campaigns are part of the logic of donation.¹ As a result, the definition of public funding varies from country to country. Distinct political regimes and economic models, as well as new categories of museums, generate different understandings of the role of governments in museum funding².

Conversely, the distinction between the public and private systems stems from divergent financing methods, but also, importantly, from the distinct status of different institutions (Mairesse 2022). However, in many cases nominal distinctions are increasingly giving way to hybrid models in practice (Hervé et al. 2011). Institutions' status and funding methods do not always overlap, but the legal status of a given museum (private for-profit institution or non-profit organization) influences its goals and how it proceeds to achieve them (Ginsburgh and Nicolas 2022). The status of museums, which differs across various regions and political structures, has an effect on funding. In addition, the large number of private museums, which are supported by various government programs (e.g. culture, science, sports, tourism, etc.) have a different understanding of public funding, which they receive in addition to private or independent funding, and so are comparable to other cultural industries.

An analysis of public funding of museums in Canada shows it to be structured around three central axes : public and parapublic assistance, own-source revenues and private

¹ Based on a synthesis of two entries in the Dictionary of Museology: Financement (Mairesse 2022) and Économie Muséale (Ginsburgh and Nicolas 2022). It should be noted that Nicolas and Ginsburgh have added a fourth main source of financing: investment income.

² Examples include : Canada (Canadian Heritage 2019), China (Bollo and Zhang 2017), Poland (Murzyn-Kupisz et al. 2019), South Korea (Park and Kim 2019), Brazil (Araújo Santos 2012), and Italy (Romolini et al. 2020).

funding. Detailed analysis clearly shows that museum funding has become complex (Institut de la statistique du Québec 2007) and relies on additional sources of revenue.

Decrease in public funding ?

Overall, beyond specific public policies on culture, academic research has highlighted diverse challenges and transformations characterizing museum funding. Research articles and book chapters underline the decline in public funding and budget cuts (Frey and Meier 2006; Alexander 2018; Lee and Shon 2018; Prokúpek and Ballarini 2022), while similar challenges have also been reported by professional associations and government agencies in Ireland (Mark-FitzGerald 2016), Sweden (Myndigheten för kulturanalys 2022; Riksantikvarieämbetet 2021) and Switzerland (Office fédéral de la statistique [OFS] 2021). In 2006, Frey and Meier pointed out a certain paradox :

The world of museums has changed significantly over the past decade and has become more important economically. Visitor numbers have increased in the United States and Europe, as museum visits have become one of the most important leisure activities and tourist attractions. [...] Most museums, however, are struggling to survive and chronically lack financial resources. (Frey and Meier 2006, 398)

Beyond the issue of public funding, museums have been facing new challenges since the 1980s, with the commercialization of culture and a market-centric paradigm (Ekström 2020; Mathieu and Visanich 2022). The penetration of neoliberal values (Alexander 2018) has led to the development of a museum-business model (Tobelem 2023), much criticized by researchers and museums (Arpin 2002). The emergence of international partnerships and the commodification of certain museums such as the Louvre and the Guggenheim (Chong 2019) are examples of these developments. These realities also lead to increasing competition among museums for grants and public donations (Frey and Meier 2006). In a neoliberal world, can we speak of museum commodification (Ekström 2020) ?

Financing in times of crisis

Fluctuations in the public funding of museums are a global phenomenon, but vary considerably from region to region (Woodward 2012; Alexander et al. 2017). While museums in all parts of the world have faced challenges, they have also shown resilience and adaptability. Museums have relied heavily on a combination of various funding sources, allowing them to hedge against financial volatility, maintain operations and expand their programs (Rentschler and Hede 2007; Woodward 2012). The economic crisis of 2008 (Bergeron 2009-2010) was a rude awakening for museums, which saw their funding, both private and public, decrease drastically, leading to staff losses, the cessation of programming, and closures. All this has jeopardized museums' mission of intergenerational transmission (National Committees of European Countries 2013).

The COVID-19 pandemic also resulted in severe financial hardships, with temporary closures, drastic reductions in visitor numbers, and significant government disengagement. Emergency government support and private donations became essential to survival (Finnis et al. 2011; American Alliance of Museums 2017). This period underscored the importance of having flexible and diversified sources of funding to withstand unprecedented disruptions (Woodward 2012). While museums have resumed normal activities since 2022, global geopolitical instability, the energy crisis and climate change, to name but a few factors, have contributed to weaken cultural life and institutions. Museums, therefore, must move towards sustainability (Styx 2022).

In summary, the economic crisis of 2008 and the COVID-19 crisis of 2020 are important benchmarks for examining the challenges facing museums. Both crises forced museums to innovate and develop non-traditional sources of funding (Romolini et al. 2020; Prokúpek et al. 2023). Although Lindqvist (2012) argues that economic crises have little effect on museums, citing their reliance on several sources of revenue, especially shareholders, to support their financial planning, the financial pressures on museums are undeniable. Around the world, even national museums do not receive sufficient funds to cover all their missions and mandates (Grefe et al. 2017).

With a view to an initial exploratory study, a literature review made it possible to sketch out an initial inventory of knowledge on the public financing of museums. This inventory then allowed us to formulate a research proposal in alignment with the objectives of ICOM-IMREC.

Thinking about public funding

Research conducted by ICOM between 2018 and 2021 revealed the following findings :³

1. The term “public funding” is traditionally associated with a government grant for ongoing operating costs, including salaries, programs, collections maintenance, public engagement, and general maintenance.
2. In many countries, government subsidies have been declining steadily since the 2007-2008 global financial crisis, but there is little information on the extent to which this is a global trend or its magnitude and impact.
3. In countries where public funding is declining, new business models are emerging, but analyses or evaluations of their long-term sustainability are not available.

Funding was therefore identified by ICOM as one of the six priority areas for museums, but the situation is complex and the picture remains incomplete. In view of the issues raised by the 2007-2008 crisis, the COVID-19, as well as of ICOM’s findings concerning the impact of a decrease in public funding for museums, the International Centre for Museum Research and Exchange (ICOM-IMREC) launched a call for research. The Centre, created in partnership by ICOM and the University of Shanghai, aims to “encourage museums around the world to engage in more diverse, inclusive and

³ As indicated in the ICOM-IMREC call for research.

democratic cultural dialogue and collaboration.” The impact of decreasing public funding, which affects museums worldwide, is central among ICOM-IMREC's concerns.

Research objectives

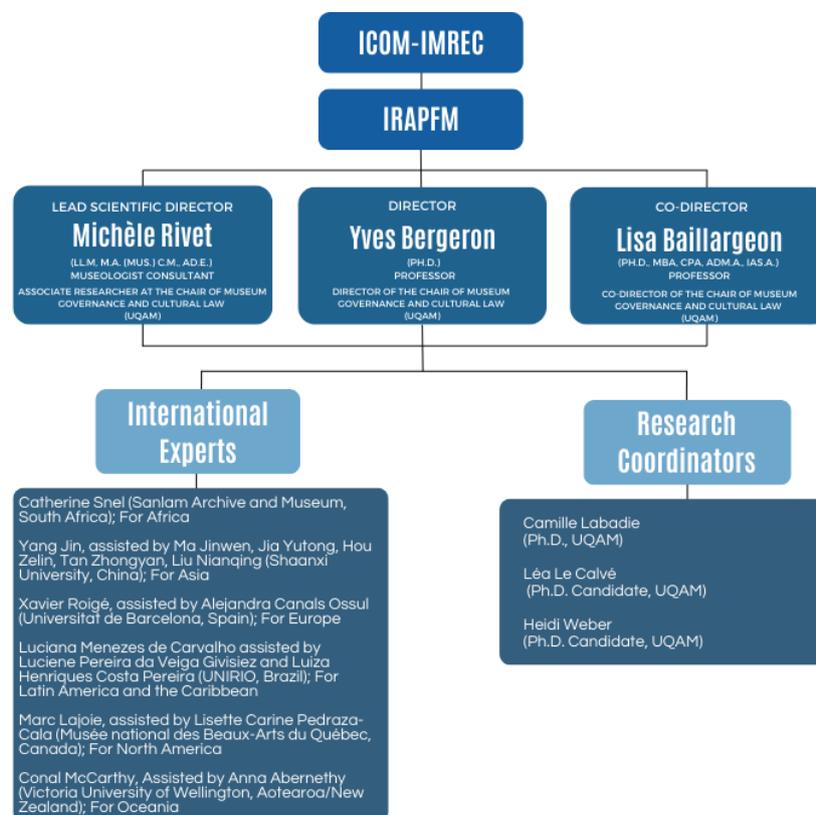
As part of its call for research, ICOM-IMREC solicited well-developed proposals from interested research partners to explore and formulate answers to four questions :

- What does the term “public funding” mean and how is it understood around the world ?
- Is the decline in public funding for museums a global phenomenon ?
- When cuts to public funding are evident, to what extent do they occur and with what impact ?
- How are museums reacting ? Are new sustainable business models emerging ?

The project brief was sent out in July 2022 and was closed in October the same year. The International International Research Alliance on Public Funding for Museums (IRAPFM), led by the Université du Québec à Montréal, was selected as the lead partner.

Our proposal

Our team : The involvement of experts from around the world



To answer the four research questions, the lead partner (Research Chair on Museum Governance and Cultural Law at the Université du Québec à Montréal) proposed to form an international consortium of experts to cover various world regions : Africa (South Africa), Asia (China), Europe (Spain), Latin America and the Caribbean (Brazil), North America (Canada) and Oceania (Aotearoa/New Zealand).

Organigramme

Preferred methodological approach : A two-level methodology

The global overview made it possible to formulate a research proposal. In order to meet the objectives of the research project, we proposed to combine, first, a statistical study and, second, a qualitative study which was conducted with a team of international researchers and museums.

Quantitative survey

The statistical survey⁴ distributed to the national associations of ICOM member countries was designed to provide an overall picture of the financial situation of museums and to allow for a complementary analysis through the qualitative survey conducted with international experts. We initially considered distributing the survey to both the national ICOM associations and all the various government ministries providing funding. However, since funding channels overlap many branches of government, as evidenced by the survey results, it became impossible to reach all the ministries concerned.

In accordance with Canadian research policy, we sought and obtained ethical certification from the Université du Québec à Montréal (UQAM) Ethics Board for Research Involving Human (CIEREH). The board ensures the methodology of data collection from among individuals representing international organizations and the use of that data with respect to protecting the confidentiality of survey participants.

The statistical survey was sent to ICOM's 124 National Committees (NC's) through a series of email campaigns between June 2023 and April 2024. Other methods of contact were used when emails were not answered. The questionnaire was administered online on a secure UQAM-hosted server.

The purpose of the survey was to validate whether public funding for museums within the international museum network has declined in recent years. A total of 59 NC's from all continents responded to the survey.

Structure of the questionnaire

The statistical survey garnered data on the current status and recent trends of funding obtained from governments and other sources. The sections of the survey were designed to allow for comparisons between the pre-pandemic period (2008 to 2019) and the post-pandemic period (2021-2022). The survey questions concerned three major topics : the decline in public funding, other sources of funding, and public funding of museums. The design was intended to measure the impact of the COVID pandemic and the overall impact of a decrease in public funding.

It should be noted that, in addition to questions concerning statistical data, several open-ended questions yielded a quantity of comments and testimonies that complement and clarify the quantitative data. In compliance with the requirements of ethical certification, all comments have been anonymized.

⁴ See Annex I for the quantitative survey.

Qualitative survey

The second part of the study was based on a qualitative approach and was conducted by international experts familiar with specific geographical areas and museum ecosystems.

The qualitative survey⁵ was carried out among a sample of museums proposed by the international experts, representing 20 to 25 museums per each geographical area under study, namely: Africa, East Asia, Europe, Latin America and the Caribbean, North America, and Oceania.

The aim was to identify and document new financing and management models. The qualitative survey was complementary to the statistical survey and covered the same pre- and post-pandemic periods. Museums were asked to describe the impact of the decline in public funding on their institutions and to highlight the innovative and alternative ways in which they responded.

Each expert collected data between August 2023 and May 2024 in order to produce a comprehensive regional report on their respective geographical area of expertise.

A total of 119 museums responded to the survey, making it possible to identify a wide range of possible solutions and innovative approaches to the decline in public funding in each region. In addition, the lead partner conducted a literature review to complement, contrast and contextualize the findings. The international experts were invited to provide documentation if they wished.

Structure of the report

The first chapter presents statistical data from the quantitative survey of 59 ICOM NC's. As a global update on latest developments, it underscores emerging trends and new economic models, as applicable, in each region under consideration.

The second chapter presents the emerging trends identified through the qualitative survey of 119 responding museums. The chapter is divided by major geographical area (Africa, East Asia, Europe, Latin America and the Caribbean, North America, and Oceania), identifying regional fluctuations in funding, describing museums' responses, as well as discussing key findings, and highlighting innovative strategies.

The third chapter examines concerns and points of interest emerging from the answers collected through to the quantitative and qualitative surveys, in particular sustainability and ethics, as well as the need for a more comprehensive understanding of museums' innovative approaches to funding.

The report concludes with a series of proposed calls for action addressed to museums, ICOM and its NC's and museum associations, as well as all levels of government and civil society.

⁵ See Annex II for the qualitative survey.

CHAPTER I - QUANTITATIVE ANALYSIS :

ANSWERS FROM ICOM NATIONAL COMMITTEES AND MUSEUM ASSOCIATIONS

This chapter presents the results of the statistical survey conducted among responding ICOM National Committees (NC's), offering a comprehensive overview of their financial situation before and after the COVID-19 pandemic, including variations in funding and their impacts. Divided into four main sections, the chapter first addresses the survey framework and the participating countries, as well as the definition of what constitutes a museum. It then analyzes the situation of museums before the pandemic (2008-2019), and afterwards (2021-2022). Finally, it explores the impacts of resulting fluctuations, with testimonies from respondents on the challenges and opportunities faced by museums in specific countries.

METHODOLOGY

- The statistical survey targeted ICOM's 124 National Committees (NC's).
- The statistical survey garnered data on the current status and recent trends of funding obtained from governments and other sources. The sections of the survey were designed to allow for comparisons between the pre-pandemic period (2008 to 2019) and the post-pandemic period (2021-2022). The survey questions concerned three major topics: the decline in public funding, other sources of funding, and public funding of museums. The design was intended to measure the impact of the COVID pandemic and the overall impact of a decrease in public funding.
- The statistical survey was sent to ICOM's 124 NC's through a series of email campaigns between June 2023 and April 2024. Other methods of contact were used when emails were not answered, including personal contacts on social media, as part of the permitted restrictions of ethical certification in accordance with university research policies in Canada.
- A total of 59 NC's from all world regions responded to the survey.

1.1 The situation of museums in responding countries

This section provides an overview of the museum context in the responding countries, based on the results of a statistical survey. It explores the challenges related to the definition, number, and funding of museums across different geographical regions.

1.1.1 The responding countries

Question : What country are you filling this survey for ?

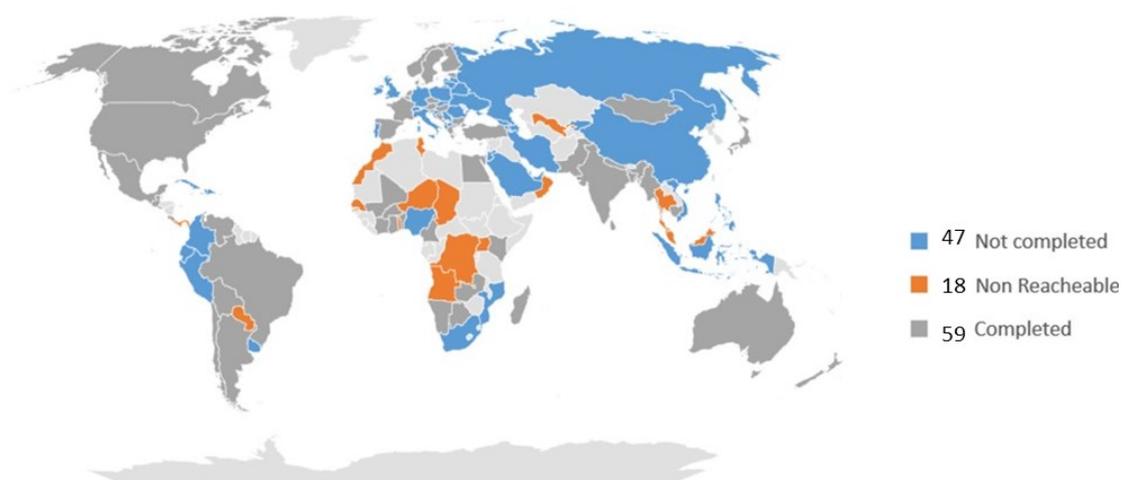


Figure 1.1. - The Responding Countries

Geographical Zone	Total number of ICOM NC's	Number of ICOM NC's without available contact information	Number of ICOM NC's with available contact information	Number of ICOM NC's completing the survey	Completed surveys as % of NC's with available contact information
Africa	26	9	17	13	76%
Asia	32	4	28	14	50%
Europe	42	2	40	19	47.5%
Latin America and the Caribbean	19	2	17	9	52%
North America	2	0	2	2	100%
Oceania	3	1	2	2	100%
Total	124	18	106	59	55.7%

Figure 1.2. - Breakdown of responding ICOM National Committees by geographical area

The survey received responses from 59 countries, representing a response rate of 55.7% across five continents (based on the NC's with available contact information). We

received no responses from 44 existing ICOM NC’s, the majority of whom were concentrated in Asia and in Europe. It should be noted that 18 NC’s, for the most part in Africa and Asia, could not be reached.⁶ Note that for three countries data were collected with the help of either museum associations or individual researchers.

Question : On estimate, how many museums are there in your country ? If possible please tell us the exact number of museums in your country.

Researchers agree on the difficulties of accurately estimating the number of museums in the world (Guiragossian 2024). UNESCO's report *The World's Museums in the Face of the COVID-19 Pandemic* estimates that there are nearly 95,000 museums across five continents. It is important to note that their distribution is uneven. It is estimated that 65.1% of all museums are located in Western Europe and North America, 12.8% in Asia-Pacific, 12% in Eastern Europe, 8.5% in Latin America and the Caribbean, 0.88% in Africa and 0.5% in Arab countries (UNESCO 2021, 5). Considering these statistics, the percentage distribution of respondents can be considered to represent an accurate reflection of the relative number of museums in the major geographical areas.

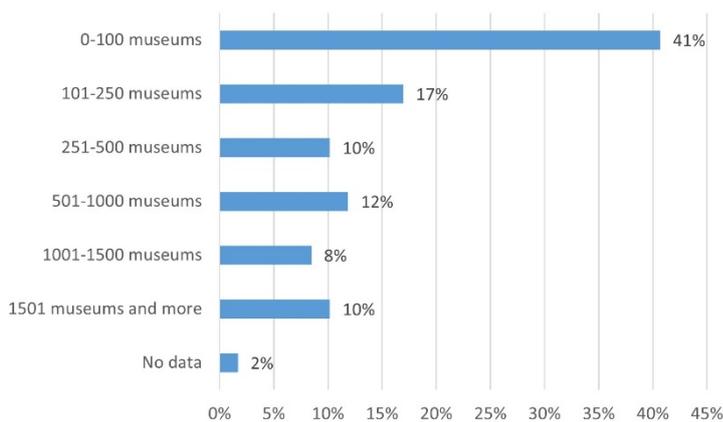


Figure 1.3. – Distribution of Museums Across Responding Countries

As apparent from Figure 1.3., the overwhelming majority of respondents (41%) indicated that their countries have fewer than 100 museums. Then, in ascending order of number of museums, the second group (17%) represents countries with 101 to 250 museums; the third group (10%) reported having between 251 and 500 museums; the fourth group (12%) has between 500 and 1000 museums; and at the high end of

the spectrum, two groups of countries have over 1000 museums : 8% with between 1001 and 1500, and 10% with over 1501 museums. This is a good illustration of the diversity of the international museum network. It should be noted that only one country did not answer this question, which does not affect the data overall. Another issue was that some countries reported that they did not have official statistics.

⁶ The National Committees were contacted based on the information available through the Committees’ directory accessible on the ICOM website (as of January 2024). Where contact information did not appear in the directory, was erroneous, or had changed, the NC was considered non-reachable. Other efforts, including through personal contacts on social media, were deployed to ensure that each NC was at least aware of the survey. Despite this, 18 NC’s proved unreachable.

When asked how many museums there are in their country, 83% of NC's were able to indicate a precise or estimated number. It should be noted that 17% of countries did not answer the question. It may be surmised that some countries with large numbers of museums do not have precise statistics. While the majority of the responding countries indicated that the numbers were approximate, some countries were able to specify the composition of their museum network :

- *In 2023 there are 11 government-owned museums, 24 in the regions and 3 private owned museums [...] as total 38. These 38 museums registered as legal entities by state registration. Also by 2020 there were 16 small museums run by university, different organizations, around 10 private museums and art galleries⁷.*

It should be noted that several NC's recognize that it is also difficult to draw an accurate picture of the composition of the museum network. Because the term "museum" is not protected, there is potential overlap between museums recognized by governments and museums created by companies or collectors. This is why establishing a definition is important in order to clarify the status of public and private museums, and thereby to clarify the statistical data.

Question : What is a museum in your country ? How is it defined ?

In 2022, at the triennial conference in Prague, ICOM adopted the following definition :

A museum is a not-for-profit, permanent institution in the service of society that researches, collects, conserves, interprets and exhibits tangible and intangible heritage. Open to the public, accessible and inclusive, museums foster diversity and sustainability. They operate and communicate ethically, professionally and with the participation of communities, offering varied experiences for education, enjoyment, reflection and knowledge sharing.
(ICOM 2022)

A majority of respondents confirmed that they recognise this definition. The second largest group is made up of countries that reported having passed legislation defining what constitutes a museum. In most of these cases, the definition is based on the ICOM definition adopted in 2022 or its previous iteration (2007). It is likely that some national legislation has not yet been updated and that its recasting should be based on the current ICOM definition. In some specific cases, the adopted definitions are inspired by certain elements identified in the ICOM definition, but also include notions specific to distinct national cultures. It is important to note that the principle of "non-profit institutions" is a common point among these definitions.

⁷ Quotes in blue are drawn from the National Committees' survey responses. Due to the sensitive nature of some answers and the anonymity required by the Ethical Certificate, as per North American research standards, all responses have been anonymized.

Several NC's listed the main functions assigned to museums within their countries. We have identified responses that mention the three main functions of museums (conservation, research, dissemination), as well as those that mention other specific functions. Thus, some countries associate the museum with notions of tangible, intangible or natural heritage, as well as with collections and places of collective memory.

Some definitions emphasize the categories of museums recognized by states, i.e. national, private, community or "other types" of museums.

Two countries indicated that they do not follow the ICOM definition and that they have not adopted strict rules to define a museum, but specified that they have put in place tools to assess the quality of museums. One country stands out in stating that no definition has been adopted "due to an incredible range of types and structures for museum institutions."⁸

Question : Do other institutions, such as libraries, community centers, historical sites, etc., receive similar consideration and public funding ?

Many public institutions such as libraries, archives, community centres, historic sites and universities perform functions similar to those of museums and receive public funding. In some countries, these places of conservation and enhancement of heritage are classified in the same categories as museums and are therefore considered museum institutions. Once again, this observation explains the difficulty of counting the exact number of museums and other types of institutions using the "museum" designation.

Several respondents added that the network of publicly funded public libraries and community centres in their country generally offers free access to exhibitions and cultural or educational activities, thus creating unfair competition with museums. It should also be noted that the funding of libraries and cultural centres, worldwide, represents greater investments than those granted to museums. In short, the funding boundaries are not always clear in the mandates of these public institutions. This situation creates a form of competition for financial support from governments.

⁸ The following definition is accepted throughout the United States and covers both tangible and intangible cultural heritage, as well as natural heritage: "The American Alliance of Museums is the only organization representing the entire museum field, from art and history museums to science centers and zoos" (AAM, n.d.).

Question : Are there museum associations in your country ?

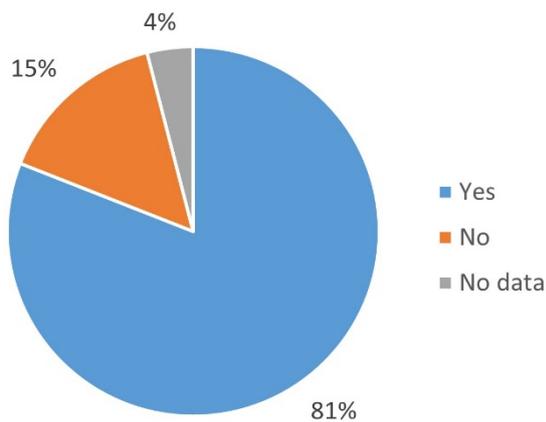


Figure 1.4. – Presence of Museum’s Associations in Responding Countries

Museum associations are an important part of the ecosystem. The presence of an association indicates that a group is dedicated to helping museums fulfill their various missions and can therefore help museums exert stronger impact, such as on governments, for example. ICOM's NC's reveal that, in 81% of countries covered by the survey, museums are represented by a professional association, or even by several associations, through which they interact with governments. These associations take different forms. In several countries, the NC's

act as museums' main representatives, but in a majority of countries various associations represent museums and museum professionals. In countries with a large number of museums, professional bodies represent occupations such as curators, museologists, restorers and heritage interpreters.

In countries with many museums, as is the case in Europe and North America, institutions coalesce into national, regional, municipal and other associations of museums. For example, there are several hundred local museum associations in Finland. Elsewhere, associations bring together museums by type : art museums, history museums, archaeology museums, science museums, society museums, children's museums, associations of Maisons-Musées, and so forth.

The associative world plays an important role in the museum network ecosystem. The terms that designate groups defending the rights of museums are revealing. There are many “associations,” “alliances,” “institutes,” “federations” and “cooperation councils” of museums. Within this long list, we have identified categories that are more specifically related to museum management, including associations of museum administrators, cooperation councils of national museums and associations of private museums, all of whom develop management and financing tools; other bodies include associations of museum volunteers, associations of museum stores, councils of museum directors, federations of ecomuseums, as well as associations of economuseums and those grouping corporate museums.

It seems that the world of museums is conducive to the effervescence of an associative environment (Mairesse 2019, 30). For example, the American Alliance of Museums (AAM) took care to list more than 80 different associations in answering the questionnaire, including museum associations in each state as well as various groups ranging from the American Association for State and Local History, to the American Institute for Conservation of Historic and Artistic Works, the American Public Gardens Association,

the Heritage Rail Alliance, the Historic Naval Ships Association, the National Interpretive Association, the Natural Science Collections Alliance, and the International Museum Theatre Alliance. In short, the museum world is deeply engaged in various spheres of social activity. Consequently, it is unsurprising that the museum network is dedicated not only to the conservation and preservation of historical heritage, but is also committed to present-day social causes.

1.1.2 Museum funding in the responding countries

Museums rely on funding sources whose diversity is to a high degree influenced by governmental recognition and policy. This section delves into the various types of funding obtained by museums, the proportion of museums that depend on private versus public funding, and the impact of government recognition. The analysis covers direct and indirect financial support, highlighting regional differences and the growing importance of self-generated revenues for museum sustainability. It also highlights regional variations in public funding and the impact of privatization laws. Finally, it provides a detailed analysis of the percentage of museums receiving public funds, revealing significant geographical differences.

Question : How does government recognition of museums affect their funding ?

Opening with a qualitative component, this question received a variety of answers, testifying to the multiplicity of museum funding models and rules of governance. Public funding is generally distributed by three levels of government : central, regional, and municipal. In 80% of countries, the museums are recognized by these three levels of government and this recognition has a crucial effect on public funding.

- *National museums and “recognized” private museums*

The so-called “national” museums are funded by governments, but these are few in number. It is usually these national museums that represent countries in international relations. In the vast majority of countries, the network is generally made up of private museums, recognized and financed in part by line ministries. It should be noted that this status gives them greater autonomy than national museums. Some states have an evaluation process in place to determine whether a museum can be recognized and funded by the state, but the majority do not.

- *Ministries*

In many countries, museum funding is the responsibility of various ministries (culture, education, science, tourism, finance, defence). In contrast with national museums, financial support for private museums is not always recurrent and is often based on special projects funded by governments (e.g. digitization, construction of reserves, renewal of permanent exhibitions, educational programs).

■ *Two types of financing*

Two types of financial support for museum institutions can be identified. The first may be termed direct financing, where the recognition of public museums by the state corresponds to regular financial support; it is most often indexed, although several respondents pointed out that this type of funding is not always sufficient to support museum missions. The second type, indirect financing, relies on laws and financial policies that promote patronage and donations through tax credits to companies, individual patrons, and foundations. This type of financing is particularly prevalent in the English-speaking world, including the United States, which has very few national museums, with the exception of the Smithsonian Institute in Washington and the national parks system. Museums generally have the status of non-profit organizations and depend on self-financing through own-source revenues : ticketing, product sales, public funding, and the establishment of foundations with mandates to raise funds and generate revenue. It should also be noted that some countries have adopted laws to privatize national museums, as was the case in the Netherlands with the adoption of a special law in 1993, which nevertheless stipulated that buildings and collections remain the property of the government.

In many countries, public funding only covers operating costs and so museums must develop stand-alone revenues in order to carry out exhibitions and special projects. This trend serves to instill a corporate culture focused on increasing own-source revenues within the museum ecosystem. Most importantly, respondents emphasized that own-source revenues are increasingly important and even necessary. As private museums become increasingly numerous, public museums face fiercer competition in soliciting funds from companies and sponsors.

Question : What percentage of museums receive public funds ?

We attempted to identify more accurately the percentage of museums receiving public funding. In 37% of the responding countries, more than three-quarters of museums (76-100%) receive public funding. In the second tier, representing 22% of the countries, between 51% and 75% museums are publicly funded. For the rest, in 29% of the responding countries, less than 50% of museums receive public funding. Note that 12% of surveyed countries did not answer this question.

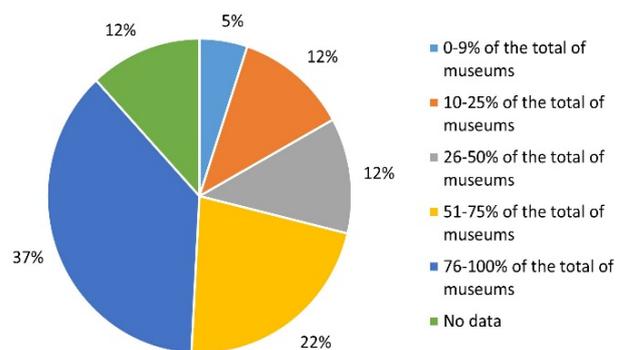


Figure 1.5.1. - Percentage of Museums Receiving Public Funds in Responding Countries

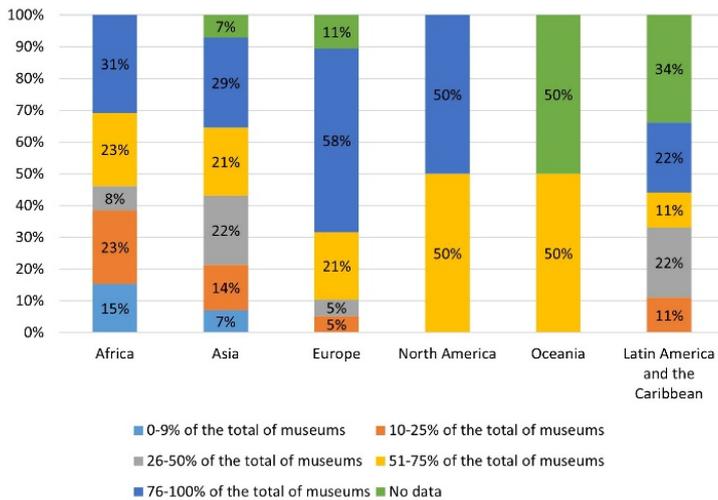


Figure 1.5.2. – Breakdown by geographical zone

for Oceania and Latin America.

When we look at the results by geographic area, we see that support from various levels of government is varied. Museums receiving public funding are more numerous in Europe: in 58% of European countries, more than 76% of museums are publicly funded. We see also that countries with the fewest publicly funded museums (0-9% of the total number of museums) are in Africa. Overall, the data vary widely from one country to another, even within the same geographic area. There was little available data

Question : Are the following levels of government responsible for funding museums ?

In our sample (Figure 1.6.), museums in 51 countries receive funding from the central government. Museums in 33 countries receive funding from regional or state governments. Meanwhile, 10 countries indicated that yet other levels of government provided museum funding.

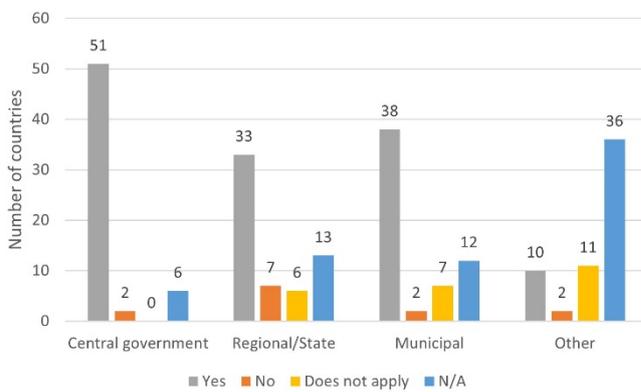


Figure 1.6. – Level of government that funds museum in responding countries

When asked which other levels of government are responsible for funding museums, respondents identified villages, cantons, independent government institutes, central banks and specific ministries, among others.

It is observable that funding levels vary considerably between central and local governments.

Question : Please list any and all other levels of government that are responsible for funding museums.

Answers to this question made it possible to note that many public bodies are responsible for financing museums and there is no standard model outside the ministries

dedicated to culture and education. In several countries, ministries of culture oversee heritage and museum bodies. Governments entrust the management of museum funding to various ministries and public agencies, such as ministries of Culture, Arts and Heritage, of Antiquities and Culture, of Communication and Culture, of Religious Affairs and Culture, of Infrastructure, of Transport, of Agriculture, of Defence, or of Education (in the case of university museums). It is clear that different countries have different understandings of which spheres of government should be responsible for funding museums.

Several government bodies have developed structures specifically dedicated to museums and heritage, such as: Brazilian Institute of Museums (Ibram), National Culture Fund (FNC), the National Institute of Historical Heritage (Iphan), National Arts Foundation (Funarte), Municipal and State Secretaries for Culture and Local Cultural Institutions, as well as other government agencies. Considering this multiplicity of public institutions responsible for museum financing, it would likely be difficult, if not impossible, to identify all such institutions across all ICOM member countries in order to draw up a truly exhaustive portrait.

Question : Has the government implemented indirect financing measures for museums (such as tax deductions for acquisitions, tax credits, fundings for special projects) ? Please comment on your answer.

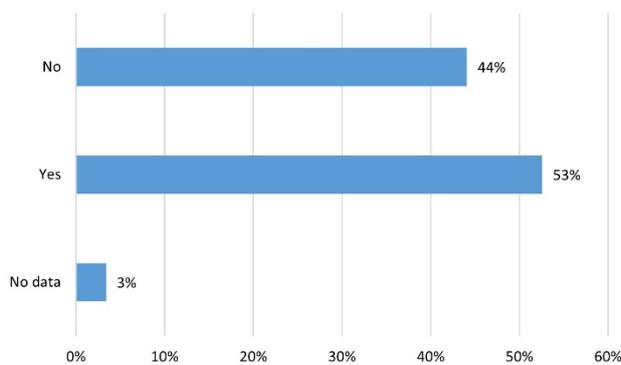


Figure 1.7.1. - Presence of Indirect Financing Measures

It is sometimes difficult to clearly identify the limits of “public funding.” We can observe that several countries have adopted legislation that promotes private financing by granting tax credits. In other words, companies and individuals can support museums and thus avoid paying some taxes. In reality, governments promoting these policies relinquish themselves of a share of revenue, but also offload a share of museum financing responsibilities to the private sector. In order to gauge the prevalence of such approaches, we asked the following question : “Has the government put in place indirect funding measures for museums (such as tax deductions for acquisitions, tax credits, funding for special projects) ?” More than half the surveyed countries (53%) answered in the affirmative (Figure 1.7.1.).

It is sometimes difficult to clearly identify the limits of “public funding.” We can observe that several countries have adopted legislation that promotes private financing by granting tax credits. In other words, companies and individuals can support museums and thus avoid paying some taxes. In reality, governments promoting these policies relinquish themselves of a share of revenue, but also offload a share of

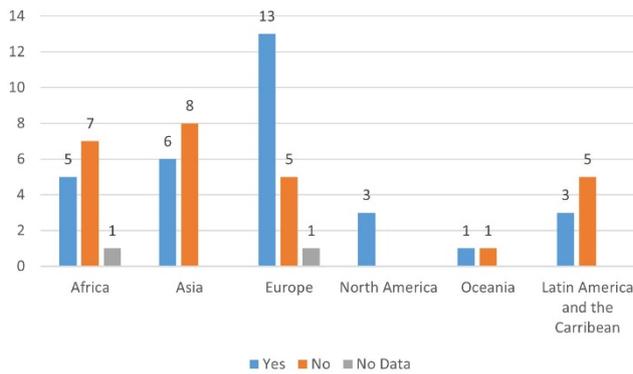


Figure 1.7.2. - Presence of Indirect Financing Measures (Breakdown by region)

Figure 1.7.2. shows that indirect funding for museums exists in all regions of the world, highlighting its global importance as a financial support model. However, the presented data is based only on responses received from the National Committees, meaning that the full picture might not be entirely represented. Despite this limitation, the information gathered provides a good overview of regional trends. Europe stands out with a strong presence of indirect funding measures, suggesting

more developed institutional support, while all responding countries in North America have indicated the presence of indirect funding. In Latin America and the Caribbean, and Oceania the balance between museums with and without indirect funding suggests a diversity of financial models and potentially varied cultural policies. Meanwhile, Africa and Asia show a lower representation of museums with indirect funding, indicating either a more limited use of this mechanism or a lack of responses from some stakeholders. These regional trends reveal heterogeneity in the implementation of indirect funding measures, offering a foundation for better understanding the different approaches adopted worldwide.

This aspect of indirect funding is important and 60% of respondents provided comments with additional information; what follows is a summary of those statements. While several countries have introduced special programs in recent years, there has also been indirect support for museums through the creation of new taxes to finance national cultural funds, for example through a tax on gambling. The examples most often cited by respondents concerned special budgets to support museums and the cultural sector more broadly. Typically, governments provide capital grants through special programs or loans for self-financing projects. Certain governments have launched initiatives to support the acquisition of works and objects. The Flemish government, for example, operates a program for the purchase of objects of “national importance” to develop collections that remain government property but are hosted by accredited museums on a permanent loan basis. In Canada, the Cultural Property Export and Import Act allows private collectors to obtain tax credits in exchange for donations to museum collections, thus also alleviating the need for acquisition budgets. The fair market value of these cultural assets of national interest is 100% deductible from the donors' income.

In the case of countries reporting that governments had not adopted any new measures, it is noted that pre-existing measures continue to apply and contribute to the public funding of museums, as evidenced by these comments :

- *The main source of funding for museums (private and public museums) is taxation, with the exception of the Federal Law on the Promotion of Culture which allows companies to deduct 100% of the money donated to cultural projects and institutions from their taxes.*
- *No, the government has not actually implemented indirect funding measures for museums (such as tax deductions for acquisitions, tax credits, funding for special projects).*

One country in particular reported an observation that appears relevant to explaining the decline in public funding for museums : rising energy costs, specifically, as well as the rising costs of materials, transport and labour, have contributed to growing inflation. Several others also pointed out that significant inflation since the pandemic has had a direct impact on the salaries and operating costs of museums. While this factor did not feature prominently in most answers to the survey, there is no doubt that it would be important to explore the impact of inflation, which has contributed to increasing the economic pressures on museums. This is especially true for countries where public funding is primarily dedicated to museum operations, but funding for exhibitions and other activities must be sought from private partners.

- *I would just like to point out that “remaining stable” means decreasing in practice, because the level of costs has increased considerably. So we're actually seeing a decrease, even though the numbers are the same. Many museums – especially smaller ones – are in very uncertain financial situations due to a sharp rise in the costs of energy, labour, materials and indeed almost everything, but budgets are still the same!*

1.1.3 The part of private funding

Museums worldwide depend on a mix of direct and indirect funding sources in proportions that are significantly influenced by government recognition and policies. This section identifies the proportion of museums funded by private sources and explores how access to different types of funding impacts museums’ financial stability and operational capabilities.

Question : What proportion of museums in your country receive the majority of their funding from private sources (Ex. : Non profit organization , company museums, foundation, etc.) ?

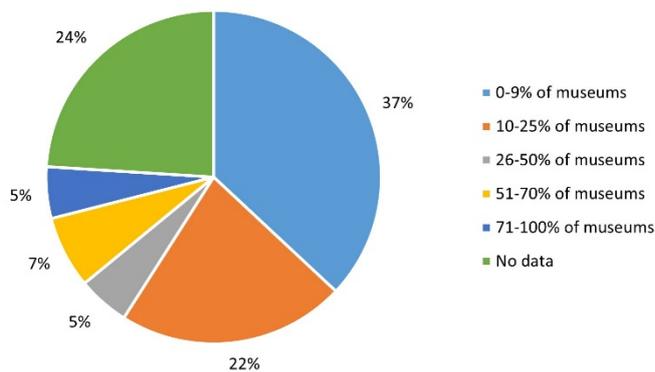


Figure 1.8. - Proportion of Museums Receiving the Majority of Their Funding From Private Sources

Testimonies indicate that the most successful museums are financed through external partnerships with entities such as banks and large companies, and sometimes they are financed by cooperative services, 'as well as by the public. This is a strategic advantage since public museums are only funded through special projects. This trend towards the development of private funding contributes to the transformation of the museum ecosystem overall through the spread of modes of operation previously adopted only by private museums by seeking out alternative forms of financing.

Question : Are there museums which operate with a combination of private and public funding ? If yes, how are they classified and could you explain their funding model, when they are neither private or public ?

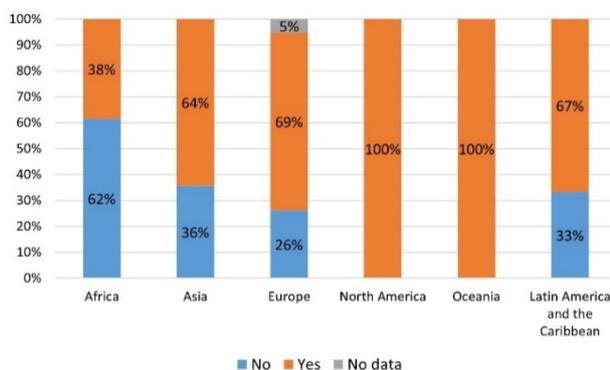


Figure 1.9. - Museums Receiving Public and Private Funding

The proportion of countries by geographic area reporting hybrid financing methods makes clear that this mode of financing predominates on all continents. In North America and Oceania, 100% of NC's structure their budgets by combining public and private funding. This practice is also significant in Asia (64%), Europe (68%) and Latin America and the Caribbean (67%). The situation is different in Africa, where less than half (38%) receive private financing.

It appeared important to identify distinctions between public and private museums. Respondents were asked to describe the funding model for museums that are neither exclusively public or exclusively private. This question, touching on a complex issue, obtained a response rate of 58%. The answers reveal potential avenues for understanding transformations in museum funding over the past two decades.

Respondents pointed out that distinctions between public and private museums are based on legal definitions and on administration methods. Some countries found it difficult to answer this question and indicated that they did not have detailed information. They also acknowledged that it would be important to conduct a survey on this subject to

better understand the changing financial ecosystem of museums. However, as one respondent commented, it is recognized that :

- *For most museums, funds are crucial in achieving their goals. There are several funds, often linked to public bodies. Each fund has different objectives and systems. Some funds are linked to lotteries, others to certain government policies or through bequests and other sources.*

- *Hybrid financing*

Some respondents questioned hybrid financing models as administered in their country :

- *They have a split personality, they are mostly located in government-owned buildings and some of their employees come from the government. However, the collection, activities and their administration are private.*

In addition to funding from various levels of government for certain museums, there exist project-based funding programs open to public and private museums. Respondents pointed out that some museums in their country are not officially considered “museums”, but nevertheless meet the functions of museums as defined by ICOM. Examples include university museums and associative museums.

- *Diversity of financing methods*

Respondents mentioned various sources of autonomous income: ticketing, room rentals, shops, sale of services, philanthropy, legacies, foundations, donations, private donations, patronage, support from businesses, time contributions from associations of friends or members, lotteries or even churches associated with exhibitions and mediation projects. In recent years, many museums have organized crowdfunding campaigns. However, some respondents noted that this strategy requires considerable effort and that its costs are especially high. Respondents also pointed out that these activities are sometimes time-consuming for museum staff.

Survey answers show that in some countries museums’ deficits are covered by public funds, but this is not a prevalent reality and museums which are not supported by various levels of government must manage their deficits independently. This forces them to review their priorities and their programs of activities.

Finally, respondents pointed out on several occasions that the emergence over the past two decades of private art museums financed entirely by companies or foundations has created competition for the public museums model.

- *A significant trend : self-financing*

Respondents point out that self-financing has been a trend observed for almost two decades :

- *All museums funded by public funds (state, regional or local) must do their best to obtain income from private sources, as funding from the state,*

region and local authorities is not sufficient to keep museums running. This demand has increased from the government over the past 15 years.

- *In some private museums, a large part of the financial resources necessary for its operation come from : receipts from entrance fees, while part comes from government subsidies. Many private museums have a high rate of self-income (entrance fees, shops, etc.), and in many cases the deficit is covered by public funds from the state or local authorities.*

The line ministries usually ask the museums they support financially to generate as much autonomous revenue as possible, often sourced from non-profit foundations, associations of friends, and crowdfunding.

- **Hybrid museums**

It seems that increasing numbers of museums operate in an intermediate zone between public and private institutions, creating a new category of hybrid museums. This change has led some governments to define this new category. In Latin America, for example, they are defined as “gestión mixta” [mixed management] museums. In some countries, respondents reported another form of hybrid institution where museums are owned or operated by charitable organizations, which allows them to be exempt from taxes.

SUMMARY

The funding landscape for museums is complex and varies significantly across different countries. Government recognition plays a critical role in providing direct financial support, while indirect funding mechanisms, such as tax incentives, also contribute significantly, especially in countries with strong traditions of private patronage. The trend towards increasing self-generated revenues highlights the growing need for museums to adopt more entrepreneurial approaches to secure their financial stability. Understanding these diverse funding models is essential for developing effective strategies to ensure the sustainability and growth of museum institutions worldwide.

1.2 Pre-pandemic - 2008-2019

This part of the survey explores how public funding for museums evolved between 2008 and 2019, the decade leading up to the Covid-19 pandemic. The period saw varied financial trends, with nearly half of the respondents reporting budget decreases, while others noted increases or stable funding levels (when adjusted for inflation). The disparities in funding fluctuations reflect a diverse global landscape, with museums in some countries experiencing significant increases in financial support, while others

faced substantial cuts. Understanding these pre-pandemic funding patterns provides essential context for assessing the pandemic's impact on museum finances.

1.2.1 Funding Fluctuations

This section explores changes in public funding for museums in the period 2008-2019. It examines whether budgets have increased, decreased or remained stable, and discusses the impact of these changes. We will also address the percentage of public funding in museum budgets and the disparities across different types of museums and regions.

Question : In the last ten years (between 2008-09 and 2018-19), how did public funding change ? On estimate, by how much did it increase or decrease ?

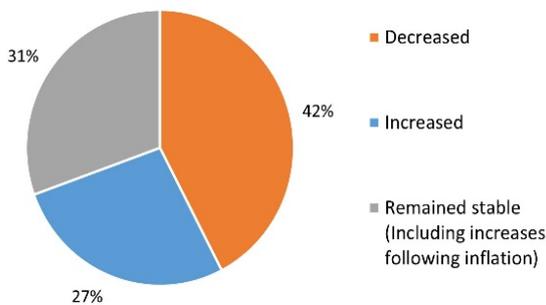


Figure 1.10.1. - Funding Fluctuations between 2008 and 2019

This was one of the central questions of this study. Almost half of respondents (42%) indicated that between 2008 and 2019, their budget had decreased, while 27% said that their budget increased in the same period. Another 31% specified that their budget remained stable and that their funding kept pace with the level of inflation.

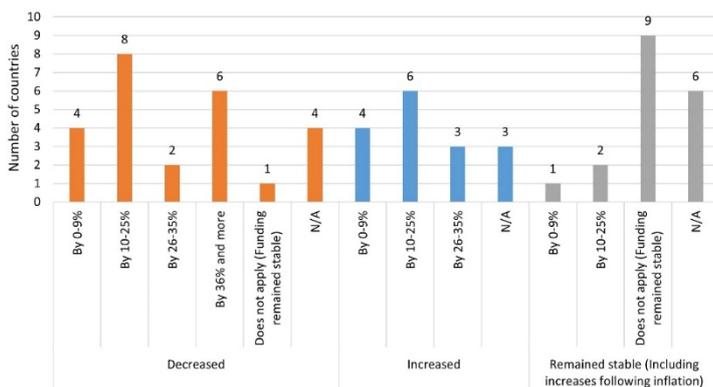


Figure 1.10.2. - Breakdown of Funding Fluctuations Between 2008 and 2019

In 8 countries (13% of the responding countries), public funding decreased by 10-25% and the decline was 36% and more in 6 countries (10%). On the other hand, public funding for museums increased by 10-25% in 6 responding countries (10%), and by as much as 26-35% in 3 countries (5%). This reveals significant global disparities. Note that some countries, although they stated that public funding remained stable, still indicated a variation. This is reflected in Figure 1.10.2.

Question : In 2018-2019 for museums that receive public funding, approximately what percentage did this funding represent in their annual budget ?

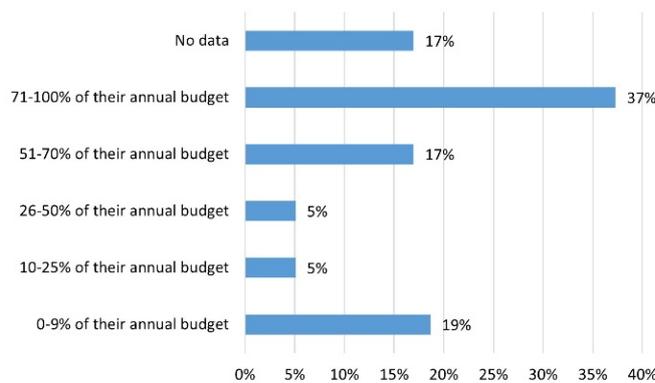


Figure 1.11. - Percentage of Public Funding in Museums' Annual Budgets for 2018-2019

In 2018-2019, museums in 37% of the responding countries received on average between 71% and 100% of their annual budget from public funding. In second place, 17% of the respondents indicated that museums were publicly funded at 51-70% of their annual budget. In 19% of the responding countries, museums obtained less than 10% of their annual budget from public funding.

Question : Did all museums receive similar amounts or are there significant differences between museums ?

It was important to ascertain whether, within individual countries, museums receive similar or disparate amounts of public funding in order to determine whether there are significant differences between museums. The response rate for this important question was 92 percent. As the question was open-ended, we collected a significant amount of feedback through which to better understand the situation in which museums operate.

Overall, respondents were unanimous in saying and demonstrating that there are significant differences in public funding for museums. We also recall the gap between the funding of national museums and regional or municipal museums (see Figure 1.6., above). One rule emerges from the comments : the sums received by museums do not correspond to a linear distribution. Rather, the distribution of funds takes into account such factors as the physical dimensions of the establishments, their number of workers, the programming of exhibitions and dissemination of educational activities, and the execution of projects of political interest to the legislature, among others. Respondents emphasized that the level of funding received by nationally recognized institutions is a function of both previous funding and periodic government evaluations. In addition, museums recognized as operating on a nonprofit basis received less financial support.

In addition to recurrent financial support, governments develop special programs such as, for example, collections digitization, the improvement of storage facilities or the creation of online content.

Some respondents noted that the line ministries did not always keep track of the fluctuations in the annual budget of museums, so that this data is rarely accessible or known. In some countries, the rules of distribution for public funds are not transparent :

- *It is difficult to know the answers to such questions overnight.*
- *Government funding for museums fluctuates in this country. Because of the problem mentioned earlier where every time the government increases our budget, a portion comes back unused, so they reduce the funding in the next cycle. The money spent by the National Museum on stationery exceeds the total budget allocated to community museums. I don't think before/after Covid will provide useful indicators. The problem here is the poor because of the distribution of funds. Again, the watchdog is also the benefactor. I think that is the real problem. As long as there is no real separation of powers, this problem will persist. I believe in the good intentions of the central/superior government. And honestly, they just can't understand why community museums keep complaining and fighting.*

1.2.2 Exploring new revenue streams

This section explores the emergence of new revenue streams for museums between 2008-09 and 2018-19. While some respondents saw no change, many reported innovations like increasing own-source revenues, digital culture development, and public-private partnerships.

Question : *In the last ten years (between 2008/09 and 2018/19), did museums explore alternative sources of revenue ?*

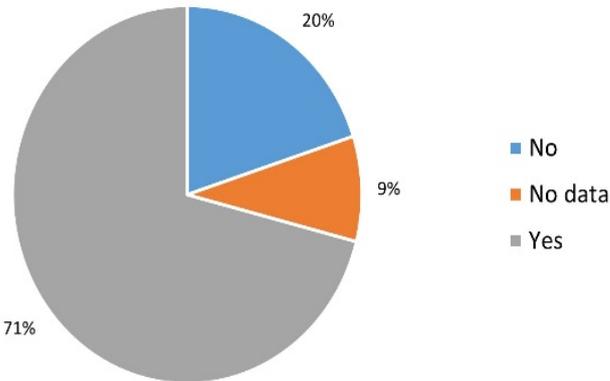


Figure 1.12.1. - Alternative Sources of Funding, 2008-2019

In the ten years leading up to the pandemic, 71% of respondents said that they explored new sources of funding. However, 20% indicated that they had not taken such steps and 9% did not answer the question.

Strategies to increase own-source revenues include investments, the multiplication of museum points of sale, and sponsorships. Several countries have chosen to focus on the development of digital culture in order to reach new audiences, beyond in-person

visits, by offering educational and cultural online activities.

Some trends emerge from the examples provided by respondents. Museums' are developing self-financing strategies and public-private partnerships are growing in number. As a result, there has been an increase in the budgets of museums taking on broader mandates, including added responsibilities with regard to tangible and intangible heritage, the development of digital culture and engagement with pressing social issues, such as the displacement of populations, poverty, climate change, wars and economic crises.

In addition, a number of responses pointed out that the emergence of new private museums creates competition for public museums in the search for financial partners :

- *There are more private museums (6 out of 8 have been founded in the last 10 years).*
- *Over the past 15 years, we have seen an increase in the number of private museums. Like us, we see a new generation of officially independent institutes, but highly dependent on local authorities.*
- *The creation of at least three new museums managed and financed 100% by the private sector.*

Respondents point to new practices such as the production of NFTs, or “non-fungible tokens.”⁹ There are still few studies analyzing this phenomenon, which should be explored more in-depth.¹⁰

In terms of trends, respondents noted that there is a change in the governance model for museums :

- *The OS (social organization) model appeared at this time. The OS is a private company that operates a public museum with private legal status but with public funds.*

While respondents agree that shift towards commercial operations is inevitable, some countries point out that this logic is not applicable everywhere, as exemplified by the Moldovan National Committee :

- *According to the legislation of the Republic of Moldova, museums are not allowed to carry out commercial activity. However, museums are*

⁹ NFTs are unique digital assets relying on blockchain technology to establish their authenticity and ownership. Unlike cryptocurrencies like Bitcoin or Ether, which are fungible and can be traded interchangeably, each NFT is unique and cannot be replaced by another.

¹⁰ For further information, see: Valeonti et al. 2021; Blais 2023.

increasingly trying to attract partnerships with economic agents to promote the institution's image and attract investment.

Question : If you answered “yes” to the previous question, what sources provided income ? (Select all that apply)

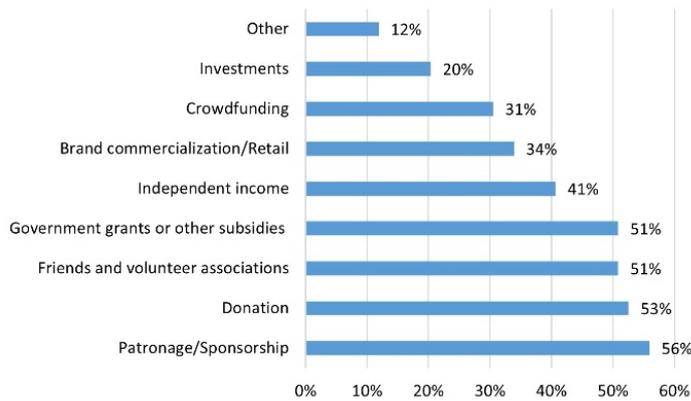


Figure 1.12.2. - Breakdown of Alternative Sources of Funding Between 2008 and 2019

We identified nine categories of museum funding sources. The most widespread source of funding according to the survey was sponsorship, reported by 93% of respondents, followed in second place by marketing at 90 percent. In third place, government subsidies and associations of friends and volunteers were tied as sources of revenue for 85% of respondents. Independent income was reported by 68% of respondents and donations associated with

sponsorships were cited in 54% of answers. Crowdfunding, in seventh place, was cited in a – fairly high – proportion of 51% of answers, while investments appeared in 34% of responses.

The alternatives aimed at generating other revenues are diverse. Some countries identified regular sources of independent revenue, i.e. space rentals, membership fees, the sale of publications, and increased ticketing revenues. The contribution of partners such as educational institutions, funds for European projects or embassies was also highlighted.

It should be noted that the “other” category represents 12% of the responses. The examples listed in the survey are varied. These include land rentals, museum space rentals, private financing, the European Projects Fund, increased admission fees, the sale of publications and agreements with UNESCO and the AFCP (U.S. Ambassadors Fund for Cultural Preservation) as well as partnerships with educational institutions (College and University).

SUMMARY

From 2008 to 2019, public funding for museums fluctuated significantly, with nearly half of museums experiencing budget cuts, while others saw increases or stable funding. This period highlighted the diversity of financial realities across different regions and types of museums. Additionally, many museums began exploring new revenue streams, such as digital initiatives and public-private partnerships, to address financial challenges, including increased competition. These pre-pandemic trends are crucial for understanding the financial impacts which museums faced during the Covid-19 pandemic.

1.3 Public financing measures during the COVID-19 crisis

While public funding measures were implemented in a number of countries to support museums during the COVID-19 crisis, the operations of these institutions were significantly impacted for almost two years. To understand these effects, we asked respondents to share their experiences and provide specific examples.

Question : Were there any public financing measures put in place for museums during COVID 19 ? Are these measures still in place ?

- *Those who answered “yes”*

More than half of respondents (51%) indicated that exceptional measures were put in place to support museums during the pandemic. Some museums used an employee retention tax credit. Some countries chose to defer fee payments. While some states maintained their financial support at a stable level, other countries only financed operational services and staff salaries. In addition, governments have honored contracts for security, cleaning, disinfection systems, visitor temperature control, IT, contactless payment systems, and improvement of air conditioning systems, among other measures. Special programs were put in place to subsidize museums' utility costs and grants were disbursed to support the activities of museums closed during the pandemic. In short, those countries chose to take advantage of this period of crisis to improve museum infrastructures.

Respondents reported that although institutions received the necessary equipment at the time, such as protective screens and hand sanitizer, the lockdown led to a decrease in public investment in museums, since public budgets were redirected towards pandemic response measures. These measures have created a significant gap between approved budgets and budgets received in practice.

While most national museums were not affected, museums that rely on own-source revenues (entrance fees, shops, cafes, space rentals) needed to find new sources of revenue. In cases where museums faced serious funding problems, some had access to additional stipends from central, regional or municipal governments to cover the costs of rent and staff in order to offset loss of income from cancelled events.

Special cases were reported by respondents as, for example, due to complex political contexts, some museums had to cope with budgets that only allowed for 50% of salaries to be subsidized.

- *Those who answered “no”*

Almost half of respondents answered “no” (49%) to the question. They noted that no special budget measures were adopted to support museums during the pandemic. In some cases, all museums were closed, so there was no activity or funding. This choice had consequences for museum staff in several countries. One respondent cited a noteworthy case :

- *Oh boy. Government here never faltered in sponsoring museums. Central government that is. But I remember me personally not having food in my house during this period because I work for a community museum. National Museum workers never really felt the effects of the pandemic. There is just so much disparity. You would be better served sending one questionnaire for community museum workers and one for National Museum workers. We are worlds apart. And I think that because the National Museum is by far the most visible, there is a belief that it is the standard for all museums. That we are all doing ok. This couldn't be further from the truth.*

- *Measures still in effect*

Among those who answered “yes” to the question, we asked if measures adopted during the pandemic were still in place¹¹. Surprisingly, 10% of museums said that some measures are still in place such as hand washing and social distancing. One respondent underlined a positive effect of the crisis, insofar as the country chose to maintain the development of museums’ digital offer. Respondents noted that there is virtually no financial support for infection control measures. In some cases, museums still offer the possibility of teleworking part-time.

¹¹ The COVID crisis and its repercussion on museums were discussed in the ICOM Report « Musées, professionnels des musées et COVID-19 » (ICOM 2020) and the UNESCO Report “Museums around the World : In the Face of COVID-19.” (UNESCO 2021). See also the sub-section “Adapting to Funding Fluctuations” in Chapter II - Qualitative analysis : answers from museums for the responses given by individual museums.

SUMMARY

Responses from museum representatives reveal a diverse range of experiences regarding public funding measures during the COVID-19 pandemic. While over half of respondents reported receiving significant financial support that helped sustain operations and enhance infrastructure, others struggled with decreased public investment and the necessity to seek new revenue sources. The continuation of some measures, like digital initiatives and health protocols, indicates a lasting impact of the pandemic on museum practices. This period highlighted the disparities in funding between different types of museums, pointing to the need for more customized and equitable funding strategies in the future.

1.4 Post-pandemic 2021-2022

The period following the COVID-19 pandemic brought significant changes to the museum sector, marked by funding fluctuations, comparisons to pre-pandemic years, disparities in financial support, and the exploration of new revenue streams. This section delves into the evolving landscape of public funding, the challenges faced by different types of museums, and the innovative strategies employed to sustain operations and adapt to the new normal. Through detailed analysis and survey data, we gain insight into the financial health of museums and their efforts to navigate a post-pandemic world.

1.4.1 Funding Fluctuations

Between 2018 and 2022, public funding for museums experienced significant variability. This section explores the overall changes in funding levels, highlighting both increases and decreases as reported by survey respondents.

Question : Between 2018/19 and 2021/22, how did public funding overall change ?

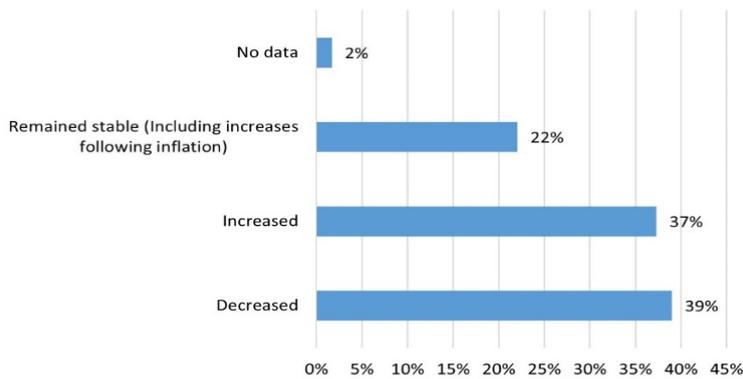


Figure 1.13. - Changes in Public Funding Between 2018 and 2022

We wanted to measure how public funding had evolved overall between 2018 and 2022. While 22% of respondents indicated that funding had remained stable, 37% indicated that funding had increased, while 39% indicated that funding had decreased.

Question : Between 2018/19 and 2021/22, did the following entities decrease their funding ?

This question was used to estimate the level of increase and decrease in public funding. However, 38% of respondents indicated that state funding has increased, while 31% noted that public funding has decreased. It should be noted that the proportion of those who did not respond was 22%.

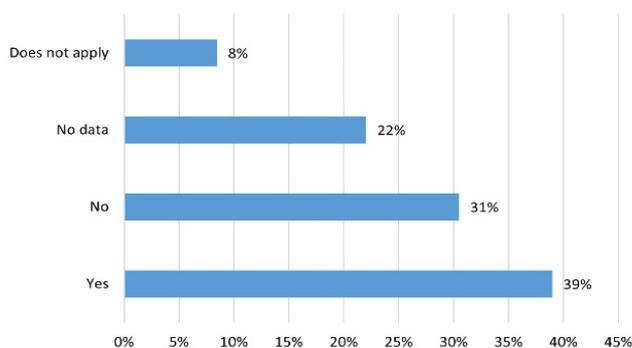


Figure 1.14. - Central Government Funding Between 2018 and 2022

When asked if central governments have decreased funding, 39% of respondents said “yes,” while 31% answered “no” (See Figure 1.14.).

When asked about local governments, the decline seems less significant : 20% of respondents said they had seen a decline in financial support from local governments. It should be noted that 27% of respondents indicated that this question did not apply and that 32% did

not answer the question.

We observe very similar results at the municipal level. A quarter of respondents indicated that municipal funding had decreased, while 20% noted that public funding had remained stable.

Some respondents were careful to provide nuance regarding municipal funding in the light of emerging social issues. Some also specified that while funding has not decreased, inflation and higher operating costs contribute to reduce resources necessary for museums to carry out their mission :

- *The amount allocated to museums in small towns has decreased due to the need to reduce spending and redirect to the health sector.*
- *I just checked this option so I could add this information : Funding hasn't decreased, but there hasn't been enough compensation for inflation and the rise of energy costs (when the war in Ukraine started).*

Question : Do all museums receive similar amounts or are there significant difference between museums ?

This question garnered a response rate of 86%. The responses clearly describe significant disparities in the financial support of museums. We have retained several comments that shed light on these disparities.

There is a disparity in received amounts between museums, due to museum sizes. The sums received by museums do not correspond to a linear distribution, but rather take into account the physical dimensions of the establishments, the number of workers, the programming of exhibitions and dissemination of educational activities, as well as the implementation of projects of political interest to the state. This reality is different for each museum and each government, since it is linked to regional and local policies. Overall, smaller (i.e. local and regional) museums are often more dependent on government funds, as they generate less income because they attract fewer visitors and charge lower entrance fees. Several respondents said that private sponsors often prefer to support larger and more prominent museums, since donating to these institutions provides more notability.

According to respondents, the drop in funding sometimes varies between 15% and 85%. The funding structure has changed in the last decades, as there are often fewer visitors and fewer events, resulting in a decrease in the contribution of financial partners.

Respondents noted the marked gap between state institutions and other museums :

- *Salaries, maintenance costs, and other expenses related to small projects (e.g. museum website design, purchase of physical accessibility aids, publications, etc.) are all provided by the Crown. Non-state museums, even those generously subsidized by the state, receive public funds for the modernization of their operations but not for their maintenance or for the salaries of employees.*

Some countries responded that there were no differences in the financial support of museums, pointing out that the situation has remained stable since before the pandemic. Also, the state budget is shared among all branches of the institution.

Respondents noted in some cases that there has been a 10% increase in government funding since the pandemic. It should be noted that it has always been easier for private museums than for public museums to solicit donors, patrons and companies.

1.4.2 Exploring new revenue streams

In response to the operational challenges brought on by the COVID-19 pandemic, museums have increasingly sought out alternative sources of revenue. This section investigates how museums have adapted their funding strategies between 2018 and 2022, highlighting significant changes and the emergence of new business models to sustain their operations.

Question : *Between 2018/19 and 2021/22, did museums explore alternative sources of revenue ? If you answered “yes” to the previous question, what sources provided income ? (Select all that apply)*

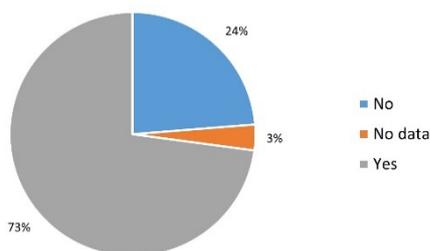


Figure 1.15.1 - Alternative Sources of Funding Between 2018 and 2022

Considering that the COVID crisis and more specifically the closure of museums had an impact on operations, we wanted to know if museums had taken advantage of the pause to identify new sources of revenue. The result obtained is significant, since 73% of respondents answered “yes,” although 24% of respondents said they had not looked for new sources of income.

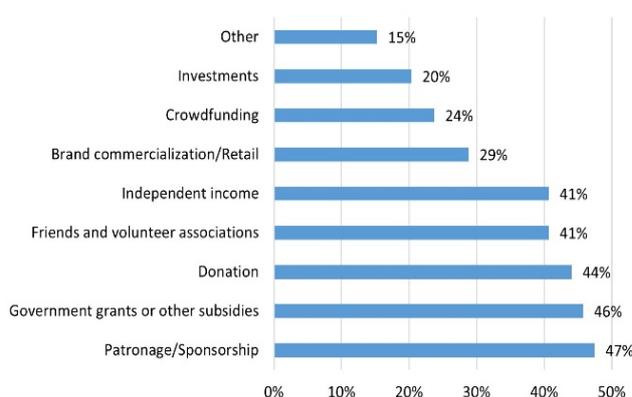


Figure 1.15.2. - Breakdown of Alternative Sources of Funding Between 2018 and 2022

We asked those who answered “yes” to the previous question to identify the new sources of income. We had prepared eight possible choices as well as an open category. Respondents were asked to select all options which applied. We can observe a relatively equal distribution for five sources : sponsorship (47%), government subsidies (46%), donations (44%), friends and volunteers (41%) and independent income (41%). A second group of less popular strategies included : brand marketing (29%), investments (20%) and crowdfunding (24%). It appears

that a majority of museums rely on traditional funding source. Crowdfunding, which appears to be a trend often seen in mainstream media, is not very prevalent in the answers.

The category of “Other” accounts for 14% of responses. Some of these responses could have been included in the specific categories above, but it is understandable that for some countries these are new practices. Examples include rental income and sponsorship, the sale of handicrafts, and subsidies for European projects. It should be noted that one country was reported as considering the reintroduction of paid admission to national museums and it would be interesting to know whether this measure would bring in sufficient revenue to compensate for the losses due to pandemic disruptions.

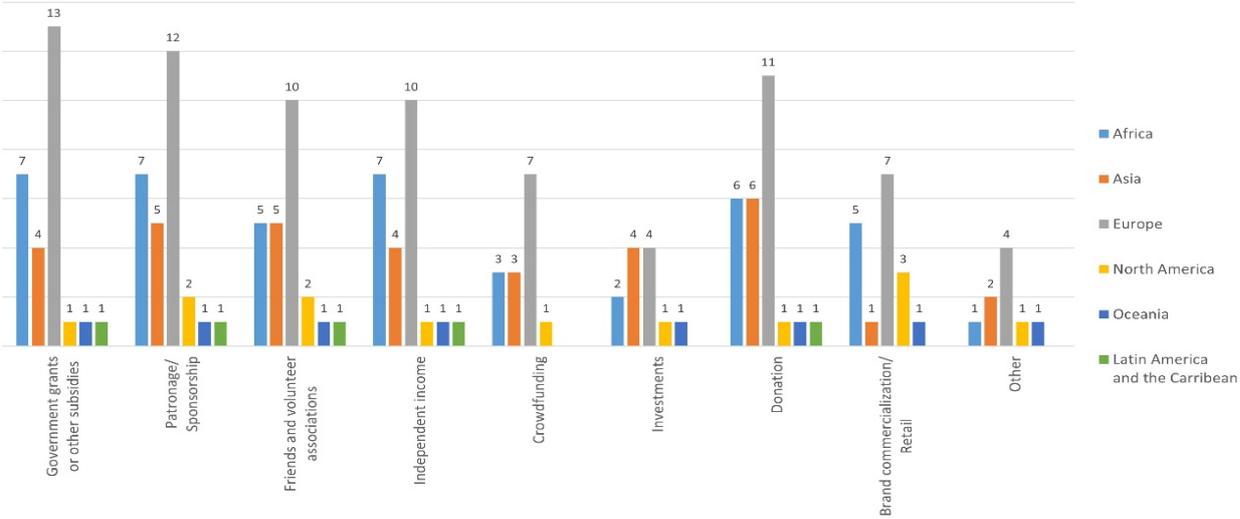


Figure 1.15.3. - Alternative Sources of Funding Between 2018 and 2022, breakdown of use by region.

This graphic shows the number of national committees who have indicated that these alternative sources of funding were used in their country.

Figure 1.15.3. illustrates the use of alternative funding sources by national committees across various regions between 2018 and 2022. Europe emerges as the most diversified region, with high utilization across nearly all funding types, particularly government grants, donations, and independent income. Africa also displays a balanced distribution, with notable emphasis on government grants, independent income, and patronage/sponsorship. In contrast, Asia shows a moderate spread across funding sources, although crowdfunding and commercialization are less prominent. North America, Oceania, and Latin America & the Caribbean have considerably lower engagement with alternative funding sources, with North America showing limited use across most categories and Oceania and Latin America/Caribbean indicating minimal to no use, especially in crowdfunding and investment. This data highlights regional disparities, with Europe leading in diversified funding while other regions show limited access or utilization of alternative financial resources.

Question : Did you see any new business models emerge in museums between 2018/19 and 2021/22 ?

This question received a response rate of 86%.

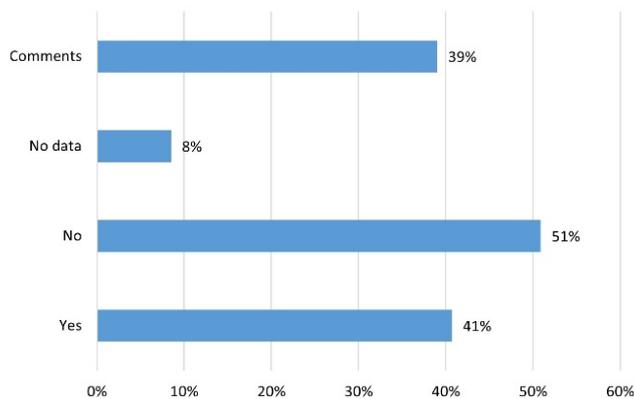


Figure 1.16. - Emergence of New Business Models Between 2018 and 2022

New business models and new revenues were reported by 39% of respondents, and they are coming from multiple sources. Responses mentioned the commercial turn of museums, increased donations and patronage, new revenues generated by digital technology and crowdfunding, as well as the appearance of new private museums.

With regard to the commercial turn, respondents point to the increase in independent revenues from the rental of spaces, investments in museum outlets, the sale of products, as well as new shops, restaurants and bookstores. Respondents also cited new exhibitions and special events organized for partners.

Donations seem to have multiplied. One respondent noted that all national institutions generate autonomous revenue through philanthropy, sponsorship, memberships, retail and investments, adding that : “even though COVID-19 has had an impact on their ability to generate own-source revenues, they have returned to this model as a way to raise funds that are in addition to public funds.” Support from new patrons was also highlighted :

- *The emergence of Major Patrons, who undertake investment projects, such as the renovation and expansion of museums, as well as the financing of international architectural competitions.*

Respondents indicated that museums have become aware of the potential of digital technology to generate revenue through online platforms by reaching new audiences through the implementation of ongoing community programs. As a result, there has been an increase in the development of digital platforms and virtual museums.

New partnerships with universities and research centres are being discussed. As well, some institutions are developing crowdfunding strategies in order to compensate for the drop in revenue due to the decrease in visitor numbers. Several respondents pointed out that there has been an increase in the number of private museums over the past fifteen years. Some governments are developing policies for new models of public funding for cultural organizations. A distinction is made between basic public funding for the day-to-day running of museums, covering staff salaries, social insurance and maintenance

costs, and so-called “additional public funding,” which varies annually according to specific projects. As opportunities for public funding become more limited, private museums are multiplying. One of their funding strategies is to develop projects financed through international donations and sponsorships.

Finally, one respondent pointed out that the museum sector has been attempting to develop new and innovative sources of revenue for several years. The trend is therefore not new, but is becoming more widespread in many countries and across different categories of museums.

SUMMARY

The post-pandemic period, from 2021 to 2022, has significantly impacted the museum sector through various changes in public funding and notable efforts to explore new revenue streams. While some museums saw increases in funding, others experienced declines, reflecting a complex and shifting financial landscape. Comparisons with pre-pandemic funding levels reveal slight overall declines, but also highlight emerging trends and disparities. Museums have demonstrated resilience and adaptability by adopting innovative financial strategies to sustain their operations in this challenging new environment.

1.5 Impacts of Funding Variations

Variations in funding for museums can have profound and far-reaching impacts on their operations, staffing, visitor engagement, and overall sustainability. This section examines the consequences of funding decreases from 2018 to 2022, highlighting challenges faced by museums globally. By analyzing responses from various countries, we aim to provide a comprehensive overview of how funding fluctuations have affected the museum sector, focusing on job losses, operational changes, visitor attendance, and outreach programs. Understanding these impacts is crucial for developing strategies to support and sustain museums in the future.

Question : Between 2018/19 and 2021/22, what were the impacts of the funding decrease in your country ?

We identified four recurring impacts, i.e. job losses, changes in operating operations, variations in visitor attendance, and fewer outreach programs. We included an open category for other impacts. The responses clearly indicate that the most prominent impact was a drop in visitor numbers (63%), particularly due to COVID. Some respondents indicate decreases as large as 50%. The second most-reported impact was a decrease in outreach programs (54%). Impacts on museum operations were reported

by 49% of respondents, while 34% reported job losses, as many museums were temporarily closed. One respondent reported that 25% of jobs had been lost in their country.

In terms of museum operations, respondents reported a high number of limited or cancelled activities. Exhibition programs in some museums were affected due to lack of funds to meet planned schedules. For some museums, savings made through cancellations of activities made it possible to cover the loss of income, but many museums experienced difficulties in covering operating costs. However, it appears that community museums for the most part continued their activities despite staff layoffs.

The open-ended question on the impacts of cuts to public funding was designed to collect detailed data and allowed us to identify specific information about the effects of public funding decreases on museums.

■ *Declining incomes and financial crisis*

Respondents pointed out that in some countries the drop in attendance resulted in a decrease in state funding. As museums' own-source revenues decline overall, promotional activities are limited and museums produce fewer exhibitions. In some countries, the pandemic has had the effect of reducing the number of museums' opening days. The financial crisis has also led many museums to cancel acquisitions, equipment purchases and research missions.

The global inflation which has followed the pandemic, combined with a decrease in the number of visitors, has created a difficult situation for museums. As a result, revenue from entry fees has decreased, causing staff cuts in many museums, affecting the museums' service offer and the preservation of heritage :

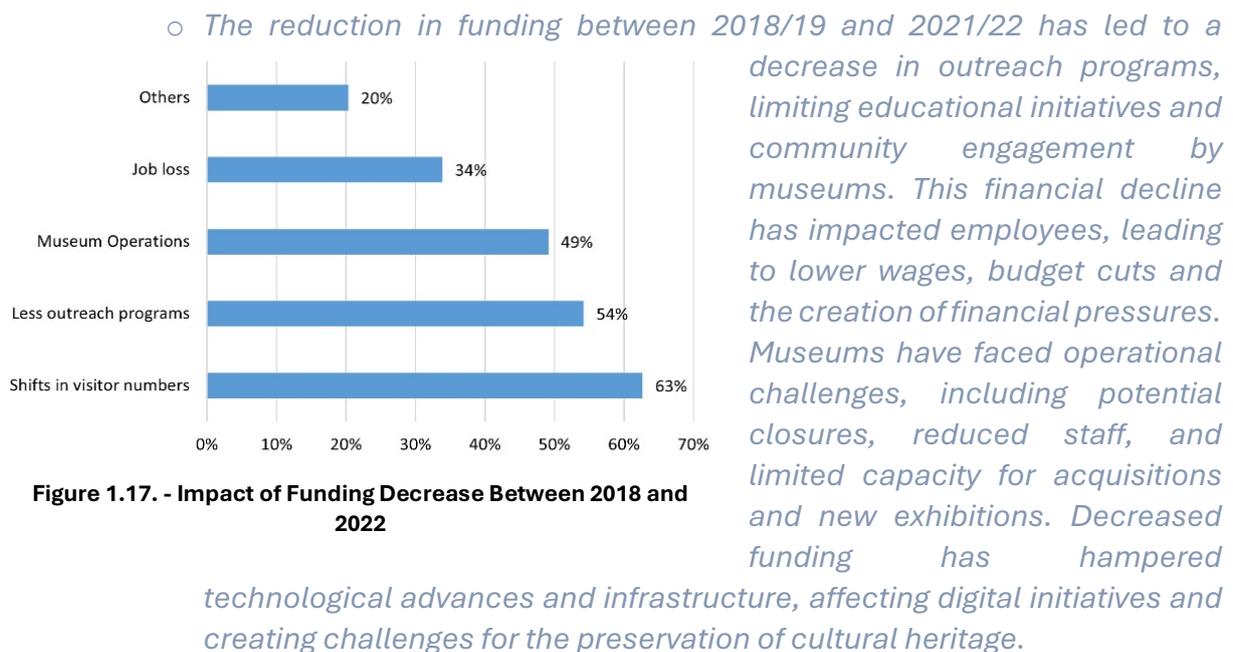


Figure 1.17. - Impact of Funding Decrease Between 2018 and 2022

- *Decline in attendance and in own-source revenue*

Respondents noted that the decline in visitors resulted in a decline in own-source revenue due to factors including lockdowns, travel restrictions and public health concerns. There is no doubt that COVID-19 and the lockdown created significant challenges for museums.

There has therefore been a loss of income within the cultural-economic fabric. Obviously, this situation, combined with travel restrictions in cities and provinces, led to a drop in the number of visitors to museums. While some jurisdictions lifted pandemic restrictions sooner, others maintained strict measures. For example, schools switched to online learning, and contributed to the decline in attendance for museums. Respondents also noted that the decline in visitors was more significant in museums located outside major cities.

- *Impacts of job losses*

Some public museums did not experience job losses, but had to cut staff hours and salaries to manage the decline in their educational and cultural activities. There has been a decline in educational and cultural activities.

Many respondents reported that the crisis context led to the loss of jobs and the consequent lack of staff to meet the needs of visitors. A report conducted by ICOM-Brasil, indicates that 30% of museum professionals suffered salary cuts and 20% were laid off during the pandemic.

Changes in museum schedules also complicated the reception of visitors. In this context of crisis, it became more difficult for museums to reach new audiences.

Museums cancelled research projects and exhibitions and the companies supplying museums could not operate normally.

- *War and energy crisis*

Two other issues emerge from the analysis : climate change and, in Europe, rising energy costs. While COVID and other factors are circumstantial, one respondent rightly pointed out that the energy crisis and rising energy costs in Europe are putting museums to the test.

- *Climate issues : since the war in Ukraine, energy costs have risen considerably. It was very alarming at first, but the levels are still higher than before. Most museums are housed in buildings that are difficult to heat. I remember at the museums congress in 2022, many directors said that COVID had been difficult, but that energy costs were even more difficult to manage. On November 22nd, national elections were held. Quite unexpectedly, one party that has won (PVV) declares in its election*

programme that it wants to put an end to all subsidies to culture and art. I don't know how this will affect our sector in the (near) future. Nb. we have just recovered from the heavy budget cuts devoted to culture in 2011-2012. It was just a policy for a limited period of time, but it caused a lot of damage to the cultural infrastructure.

■ *Climate of uncertainty - demotivation*

Some respondents highlighted a feeling of abandonment by central governments and the context of crisis in the museum world :

- *The museum sector was very affected during this period and did not receive any support from governments.*
- *Cultural policy does not give enough importance to museums, even if the ministry creates museums, it does not provide them with enough resources to develop and undertake activities other than exhibitions.*
- *The most direct impact that has affected museums has been the political situation, which has affected all areas of development in the country.*

This context of financial crisis contributes to a feeling of uncertainty and demotivation in the museum community. Respondents noted that museums are acutely aware of the uncertainties they face. Due to the decrease in funding, demotivation affects museum staff.

Repeated cuts have had an impact on outreach programs, which are becoming difficult to plan, undermining the confidence of museum staff :

- *The National Museum was on the verge of reopening when COVID-19 became an issue and funds were directed there, but managed to open with limited funds. Funds for awareness-raising programs were almost non-existent. Limited outreach programs have all been cancelled.*
- *Awareness programs continue to run into the “lack of funds” syndrome. This discourages teams from planning any program that requires funds for implementation. After the opening of the National Museum in 2022, national patronage has increased significantly.*
- *The decrease in funding, as well as the bureaucratic system that museums in this country create, creates a lot of uncertainty among their workers. There is an impact on the mental health of the staff, because it is not known if their salaries will decrease, and many of them are*

overworked, because they have to take on tasks that belong to other departments.

- *In almost every way imaginable. I get moved just by writing this. We cannot talk about growth when we are barely surviving.*

All of these impacts have clearly affected the working climate and the confidence of museum staff. The following noteworthy comment illustrates the reality beyond the statistics :

- *Like what. As I write, it was only yesterday that I was paid. My last salary before that was in November. I received the full amount, but it still represents 2 full months without pay. You can't do anything. There are no health benefits. It's just horrible. But again, I think the central government is not to blame. I think that a misallocation of funds at the level of the Museum [...] is to blame.*

- *Opportunities and difficulties in innovating*

Several respondents pointed out that the financial crisis experienced by museums also offers opportunities. Of particular note is the renovation of museum infrastructure and the training of staff. In Greece for example, despite the fact that museums had to close their doors to the public, many of them emerged from the pandemic period stronger and more creative by focusing on their research mission or even by reorganizing and modernizing their infrastructure. On the other hand, one respondent took the trouble to point out that it is difficult to propose “radical changes” in the way museums operate because of the crisis.

- *Other impacts*

The open-ended category of “Other” impacts received an 18% response rate. Two respondents indicated that there had been no impacts, with one specifying that this was because funding had remained stable. Respondents also noted that the drop in revenues has prevented museums from maintaining contingency funds that could affect their development over the medium and long term.

One respondent noted that due to the pandemic, some audiences have become more interested in online platforms and that this trend has had an impact on museum attendance.

Question : As we conclude, is there any additional information you believe would enhance our final report, which you haven't had the opportunity to mention previously or that you feel merits further discussion ?

In conclusion, we asked respondents if there was any additional information that would require particular attention in order to make the survey more comprehensive. More than

half of respondents (58%) offered comments. A number of replies stated that there was no need to add anything else because the survey was sufficient in its current form. Respondents were also careful to specify that answers given to the previous questions corresponded to widely accessible national surveys and government policies.

ICOM NC's highlighted the limitations of the responses due to the lack of available information. Others pointed out that the particularities of their museum network did not correspond to the model favoured by ICOM and suggested communicating directly with them. One respondent recalled that in some economically disadvantaged countries, the recognition and protection of culture and heritage is not a government priority.

- *Fair distribution of budgets*

Other respondents pointed out that relationships with governments are not always transparent, and that it would be useful to carefully examine the distribution of budgets that do not always appear to be equitable :

- *We need to shed light on the nature of the problem here. We have an unusual privilege that there is actually more than enough for everyone if the money was properly distributed. Everything needs to be restructured and reworked, but the people responsible for this are the cause. There needs to be a major overhaul. In principle, the problem is actually simple to solve, provided that the powers that be see the problems as they are.*

Another respondent further emphasized the secretive nature of public funding :

- *We note that there is no democracy in the execution of museum budgets in our country. Budget appropriations remain secret in the hands of museum directors and there is no report on the museum management budget available in print or online.*

- *Guaranteeing the future of financing*

We were also told that while public funding for museums has remained relatively stable over the past decade, it does not seem to be guaranteed for the future. This climate of concern leads museums to develop unwavering pleas to thwart attempts to reduce funding for museums while other sectors such as libraries have obtained an increase in their funding. As noted earlier, libraries have a cultural mission similar to that of museums and produce their own exhibitions, as well as educational and cultural programs.

- *Positive effects of the crisis (?)*

Respondents also highlighted positive aspects associated with the health and financial crisis. One of the unexpected effects of the global health crisis was to increase the number of local visitors during COVID-19 lockdowns. The various events and exhibitions,

including temporary exhibitions, have enriched the list of funding agencies and their interest in raising awareness of museum collections and heritage.

In terms of outreach, there has been an increase in digital exhibitions and other museum programs, as well as an increase in digital educational content. There has also been an increase in online conferences for the public and for museum professionals.

The health crisis has led museums to reconsider their role in society and to rethink relations with the public :

- *In some circumstances, it is necessary to broaden museum actors to a wider range of people than those who visit museums, and to enrich services by offering various online programs to those looking for various ways to use museums. Efforts to digitize museum materials, digital archiving, and their use are ongoing.*

Respondents also highlighted the solidarity evident between museum institutions during this period and the emergence of new links between institutions.

- *Searching for other models*

Answers demonstrate a consensus on the fact that the health crisis and the financial crisis have been an opportunity for museums to identify innovative practices, both in their relations with communities and citizens, and in the development of new modes of communication and funding.

Survey respondents noted that the general public seems to believe that museums are rich, perhaps because the perceived value of collections becomes conflated with museums' financial assets, but it is perhaps not well understood that museums cannot monetize this heritage. This begs the question : How can we better educate the public at large about public funding for museums ?

There is also a consensus on the common objective of improving financial management.

Some respondents highlighted the effects of the pandemic, at the same time recalling that the health, financial, ecological, and public trust crises facing the museum world also represent opportunities to seek other funding models in order to sustainably support the museum network.

- *The impacts of the economic downturn on museums in the Latin American region have been a constant, not only because of COVID-19, which has undoubtedly become more critical, but also because of the direct impact on museum professionals. Many have lost their jobs and this situation has not improved significantly. We think that we must look for other models.*

While several respondents agree on these findings, few innovative models were identified in the statistical survey. Chapter II will present these new funding models in more detail.

SUMMARY

The decrease in funding between 2018 and 2022 significantly impacted museums, leading to reduced visitor attendance, fewer outreach programs, operational challenges and job losses. These repercussions highlight the critical need for sustainable funding to maintain museum operations, retain staff, and develop community engagement. Financial constraints have not only affected immediate operations, but have also posed long-term challenges for the preservation and promotion of cultural heritage. Survey responses highlight the need for transparent budgeting, future funding guarantees and new funding models. Respondents also noted positive outcomes like increased local engagement and digital innovation, emphasizing sustainable financial management and museum adaptation.

1.6 Highlights

General findings

- The survey reveals a lack of comparable statistical data across different regions, countries and institutions.
- The vast majority of respondents confirm that they recognize the ICOM definition adopted in 2022 and the responsibilities specified therein.
- The survey highlights the significant contribution of three levels of government to public funding, namely : central, regional and municipal governments.
- In many countries, funding is the responsibility of various line ministries (culture, education, science, tourism, finance, defence).
- There are two types of public funding. The first can be described as direct in the case where the recognition of public museums by the state corresponds to regular financial support, most often indexed, although several respondents pointed out that this type of funding is not always sufficient to support museum missions. The second is indirect financing, based on laws and financial policies promoting patronage and donations through tax credits to companies, individual patrons, and foundations.
- With the exception of national museums, financial support for private museums is not always recurrent and is often based on special projects funded by governments (e.g. digitization, construction of reserves, renewal of permanent exhibitions, educational programs).
- Respondents emphasized the importance of own-source revenues, which are increasingly important, if not indispensable.
- It seems that the world of museums is conducive to the effervescence of the associative sector, which plays a key role in defending public funding with the various levels of government.
- Overall, respondents were unanimous in saying and demonstrating that there are significant differences in public funding for museums.

A significant trend : self-financing

- The survey highlights a general trend that has favoured the development of own-source revenues and the development of a corporate culture over the past two decades.
- This trend towards the development of private funding contributes to transformation of the museum ecosystem overall through the spread of modes of operation previously adopted only by private museums by looking for alternative forms of financing.

Hybrid financing

- Almost two-thirds of the responding countries (63%) say they rely on both public and private finance. Some countries are challenging hybrid finance as a mode of management. On the other hand, just over a third of countries (36%) indicate that there is no hybrid mode of public and private financing.

- The gap is widening between museums that combine public and private funding and those that do not.

Competition

- As private museums seem to be increasingly numerous, competition seems to be more fierce for public museums when it comes to soliciting companies and sponsors.
- Many public institutions such as libraries, archives, community centres, historic sites and universities perform similar functions to museums and receive public funding.

Comparison of the situation for the periods 2008-2019 and 2020-2022

- The portrait of public funding from 2008 to 2022 shows a general decline in public funding in the majority of categories. This decrease varies from one country to another.

The impacts of funding variations

- The responses clearly indicate that the most prominent impact was a drop in visitor numbers (63%), particularly due to COVID. The second most-reported impact was a decrease in outreach programs (54%). Impacts on museum operations were reported by 45 % of respondents, while 34% reported job losses, as many museums were temporarily closed. One respondent reported that 25% of jobs had been lost.

New business models

- Overall, 39 % of respondents say they have observed new business models and new revenues. In answers to open-ended responses, we noted the commercial turn of museums, increasing donations and patronage, new revenues generated by digital technology and crowdfunding, and the appearance of new private museums.
- New partnerships with universities and research centres are being discussed. As well, some institutions are developing crowdfunding strategies in order to compensate for the drop in revenue due to the decrease in visitor numbers.

Consequences and factors not to be overlooked

- Post-pandemic inflation, combined with a decrease in the number of visitors, has created a difficult situation for museums.
- In the case of public museums, there have not always been direct job losses, but there have been indirect consequences. There has been a decline in educational and cultural activities.
- Museums have cancelled exhibition projects and reduced research projects.
- Two other issues posing challenges for museums emerge from the analysis : climate change and, in Europe, the rise in energy costs due to the war in Ukraine.

Climate of uncertainty – demotivation

- Some respondents highlighted a feeling of abandonment by the state and the context of crisis in the museum world
- Repeated cuts have an impact on awareness programs, making it difficult to plan. This undermines the confidence of museum staff.

Opportunities and difficulties in innovating

- Several respondents point out that the financial crisis that museums are going through also offers opportunities. Of particular note is the renovation of museum infrastructure and new staff training programs.
- One of the unexpected effects of the global health crisis was an increase in the number of local visitors during the COVID-19 lockdown period.
- In terms of mediation, there has been an increase in digital exhibitions and other museum programs, as well as an increase in digital educational content. There is also an increase in online conferences for the public and for museum professionals.
- There is consensus on the common objective of improving financial management.
- Respondents highlighted the effects of the crisis, at the same time recalling that the health, financial, ecological, and public trust crises facing the museum world also represent opportunities to seek other funding models in order to sustainably support the museum network.

SUMMARY

The survey highlights a shift towards self-financing and hybrid funding models in museums, driven by declining public support and increased competition. While funding cuts have led to reduced visitor numbers and program limitations, new revenue models and digital innovations present opportunities for growth. Despite challenges such as inflation and rising energy costs, museums are adapting and improving their operations.

1.7 Conclusion

In conclusion, this chapter presents the quantitative analysis of the results of a comprehensive statistical survey conducted among museums in various countries, illustrating the profound impacts of the COVID-19 pandemic on museum operations and funding. The survey, which included responses from 59 countries, reveals diverse challenges such as varying definitions, numbers, and funding mechanisms. As well, there are significant disparities in museum distribution, most of which are concentrated in Western Europe and North America. The analysis underscores the critical need for standardized definitions and consistent data collection to support the international museum community more effectively. Furthermore, the chapter highlights the increasing reliance on self-generated revenues and the importance of hybrid funding models combining public and private sources, which are essential for ensuring the sustainability and growth of museums worldwide. This quantitative analysis provides a crucial foundation for understanding the financial and operational dynamics of museums, paving the way for more informed strategies to address their evolving needs and challenges.

CHAPTER II – QUALITATIVE ANALYSIS : ANSWERS FROM MUSEUMS

The previous chapter reported on general variations in public funding for museums, globally since 2008. This chapter will enable us to take a closer look at certain institutions, which is all the more important given the many changes and challenges facing museums. From Africa's post-colonial transformations and East Asia's rapid economic expansion, to Europe's fluctuating public funding and North America's reliance on diversified revenue streams, the global museum sector is marked by resilience and innovation. In Latin America and the Caribbean, economic instability and political changes necessitate creative funding solutions, while museums in Oceania adapt to declining public support through increased commercial operations and digital engagement.

This chapter presents an analysis of the fluctuations in museums' funding experiences, as well as of the strategies and innovative practices implemented in the face of these variations. It examines how these institutions strive to fulfill their cultural and educational missions amidst financial and economic pressures, evolving public expectations, the imperative to comply with environmental and social responsibility, and the need to integrate digital technologies. By exploring the diverse experiences of museums globally, we gain insights into the universal and unique aspects of maintaining and growing cultural institutions in the 21st century.

The analysis presented below is based on regional reports prepared by six international experts, each of whom compiled data from a number of museums in a specific geographic region. A total of 119 museums worldwide (see Figure 2.0 for the breakdown by regions) were surveyed, resulting in the observations presented in this chapter.¹²

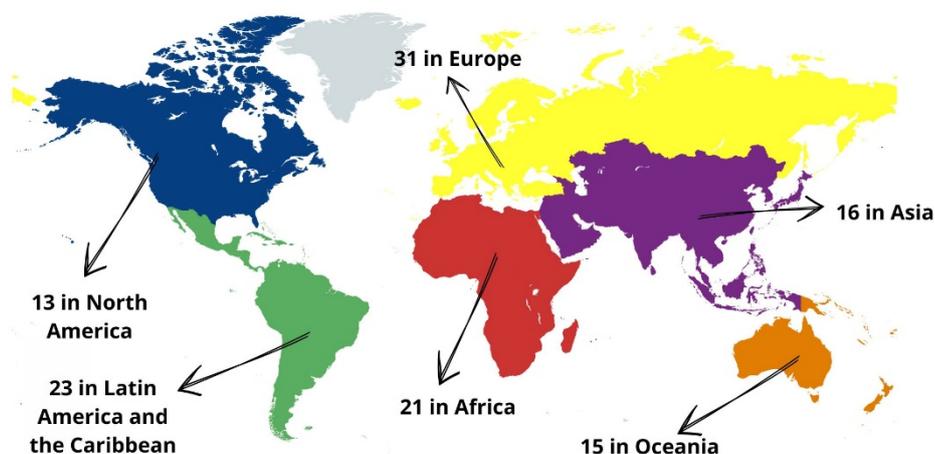


Figure 2.0. - Breakdown of museums by geographical zones

¹² This chapter c

METHODOLOGY

- A qualitative survey was carried out among a selection of museums proposed by international experts, with 20 to 25 museums per geographic area (Africa, East Asia, Europe, Latin America and the Caribbean, North America and Oceania).
- The aim was to identify and document new financing and management models. The survey was complementary to the statistical survey and covered both the pre- and post-pandemic periods. Museums were asked to highlight the impact of the decline in public funding on their institutions, but also the innovative and alternative ways in which they responded.
- Each expert collected data between August 2023 and May 2024 in order to produce a comprehensive regional report of their respective geographic area. A total of 119 museums responded to the survey.
- Some members of the Project Steering Committee specifically asked for the many quotations throughout the report to be regionally referenced in order to highlight the global impact of the findings. Though this was considered, the Project Team felt that the provision of respondent anonymity assured took specifically precedence.

2.1 Africa

2.1.1 Overview

Museums on the African continent have grown in various ways and with many factors, including geographical position. Until the end of colonialism, the few existing museums were designed on European models, if not directly by Europeans. These museums were made to showcase their natural resources to white elites. As such, they were rooted in vastly different political and cultural concepts from those of local populations. After gaining their independence, African countries made efforts to transform these museums into showcases of their own national prestige. In November 1963, le *Centre de Formation de Techniciens de Musées en Afrique* opened in Jos, Nigeria, establishing the foundations for an African museology through which to preserve and showcase the continent's own heritage and stories (Effiboley 2022). Despite this, the basic set-up of African museum institutions was rooted in European ways of exhibiting artifacts.

Today, contemporary museums in Africa face the challenge of being relevant to the communities they serve. They work to impress on visitors, both local and tourist, the importance of cross-cultural understanding, both on the continent and beyond (Adeyemi 2023). African museums preserve both tangible and intangible heritage, and work to promote education in their communities. Memory is often the core of museums, since many African artifacts were looted and are now missing or displayed elsewhere. In post-colonial institutions, stories must be told that reflect the culture of the people who will

visit the museums, that is, of Africans. For example, South Africa is often cited as a model for the relevance of museums in a post-colonial and, more importantly, post-apartheid world (Vivan 2014). There are more than 800 museums throughout Africa (UNESCO 2021), growing to be more socially relevant, entertaining and educational: “They are destined to become symbols of national pride and unity” (Abungu 2005).

The survey sample for Africa consists of 21 museums,¹³ for the most part representing the South and West of the continent. Contacting museums in the Maghreb proved difficult and while efforts were made consistently, only one museum returned a completed questionnaire.

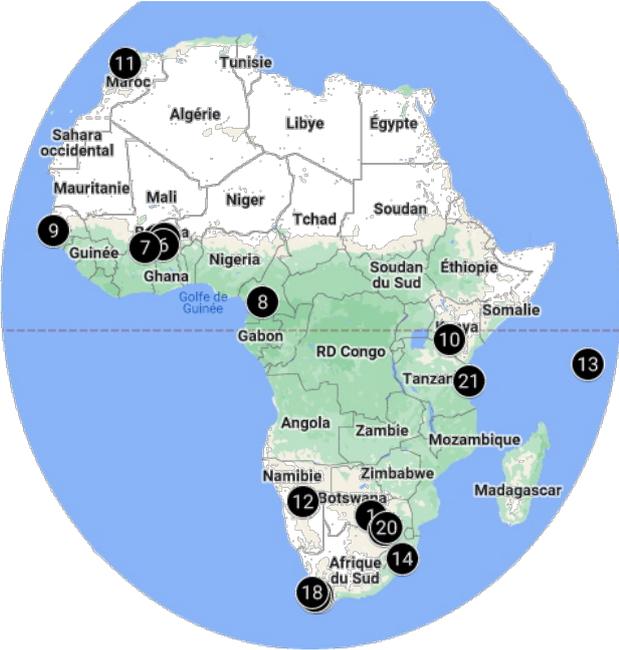


Figure 2.1.1. - List and location of responding museums (Africa)

1. Phuthadikobo Museum (Botswana)
2. The Georges OUEDRAOGO Music Museum (Burkina Faso)
3. Musée de l’Eau du Burkina Faso (Burkina Faso)
4. Musée RAYIMI (Burkina Faso)
5. Musée Mgr Joanny Thévenoud (Burkina Faso)
6. Musée Ethnographique et du Conservatoire Botanique (Burkina Faso)
7. Musée Communal Sogossira SANON (Burkina Faso)
8. Blackitude Museum (Cameroon)
9. National Museum of Gambia (Gambia)
10. National Museums of Kenya (Kenya)
11. Maroc Telecom Museum (Morocco)
12. National Museum of Namibia (Namibia)
13. Seychelles National Museum (Seychelles)
14. KwaZulu-Natal Museum (South Africa)
15. La Motte Museum (South Africa)
16. Afrikaans Language Museum and Monument (South Africa)
17. Sanlam Archive and Museum (South Africa)
18. !Kwa ttu Heritage Centre (South Africa)
19. South African Post Office Museum (South Africa)
20. University of Pretoria Museum (South Africa)
21. National Museum of Tanzania (Tanzania)

¹³ The data from these museums were collected by Catherine Snel. For a complete breakdown of the museums in Africa, see Annex III.

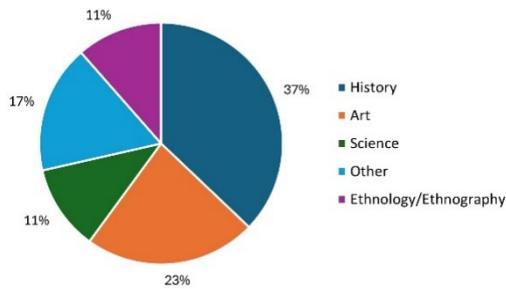


Figure 2.1.2. - Types in Responding Museums (Africa)

Museums were asked to choose one or two types to describe themselves. The 21 museums in the sample made a total of 35 choices of type. The % reflects that number (35).

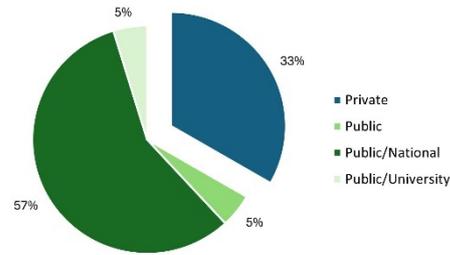


Figure 2.1.3. - Legal Status of Responding Museums (Africa)

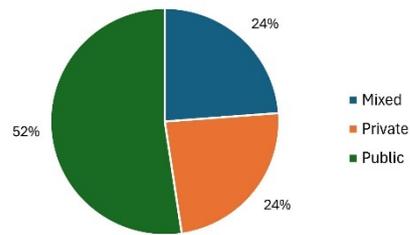


Figure 2.1.4. - Funding Sources of Responding Museums (Africa)

2.1.2 Funding Fluctuations

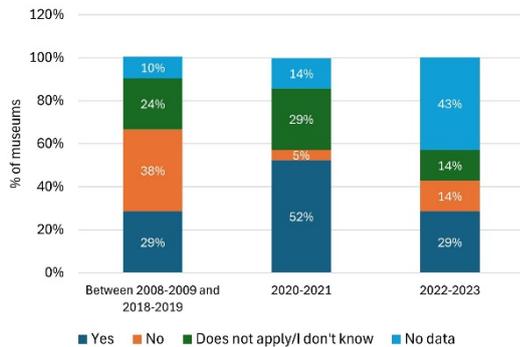


Figure 2.1.5. – Breakdown of Public Funding Decrease in Responding Museums (Africa)

To the question: Did public funding decrease?

Pre-pandemic, 8 out of the 21 surveyed museums reported that public funding made up between 71% and 100% of their budget, but their number dropped to 6 post-pandemic (See Figure 2.1.6.). Looking at the numbers in Figure 2.1.5., we can observe that more museums receive a smaller amount of public funding than before the pandemic while fewer museums receive large amounts.

Public funding for museums in several of the surveyed African countries has notably decreased in recent years, even pre-pandemic in some cases, but most notably post-pandemic. As shown in Figure 2.1.6., 52% of surveyed museums reported a decrease in funding in 2020-2021, with only 5% noting an increase. The situation was somewhat better in 2022-2023, but 29% of museums still experienced a decrease in public funding.

The National Museum of Gambia reported an increase in funding, both before and after the pandemic. For the Musée Communal Sogossira SANON, funding decreased during the pandemic, but increased afterwards. However, in Tanzania, the Seychelles and South Africa, the post-pandemic decrease has been between 11% and 25%. Both La Motte Museum and Sanlam Archive and Museum did not suffer from a decrease in funding as

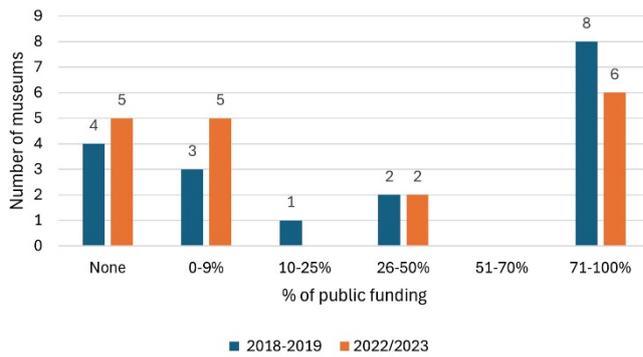


Figure 2.1.6. – Percentage of Public Funding in Responding Museums (Africa)

To the question : What percentage did public funding make up for your museum?

everyday operations. The Seychelles National Museum reported that significant reductions in public funding had impacted their ability to maintain operations and preserve collections. This funding shortfall has necessitated the postponement of necessary upgrades and repairs, threatening the long-term preservation of valuable cultural artifacts. Both the Blackitude Museum, and the Georges OUEDRAOGO Music Museum have stated that temporary exhibits were affected by the decrease, forcing the museum to extend these exhibits beyond usual time spans. The lack of sufficient funding has hindered their ability to execute their museological duties effectively, impacting both staff and the quality of their programs.

they are funded at 100% by private companies. These variations in funding from one country to another, even one museum to another, poses significant challenges for these institutions (See Figure 2.1.7. for impacts of funding decreases). These cuts have severely impacted museums and hindered them in carrying out their crucial social role in preserving cultural heritage and providing public education.

One of the most evident impacts is on

Some projects require that you feed the community and provide transport to and from their home. With decreased funding this affected community projects.

Another significant impact is the limitation on public programming and community engagement projects, both before and after the pandemic. Musée Communal Sogossira SANON has also had to limit its field trips in school, for example, which limits the museums’ ability to engage with the public and fulfill their educational mission. Another example is reduced hours of opening, like the Musée Mgr Joanny Thévenoud. This, coupled with a halt in community engagement programmes greatly compromises accessibility, as well as interfering with the museum’s social mission.

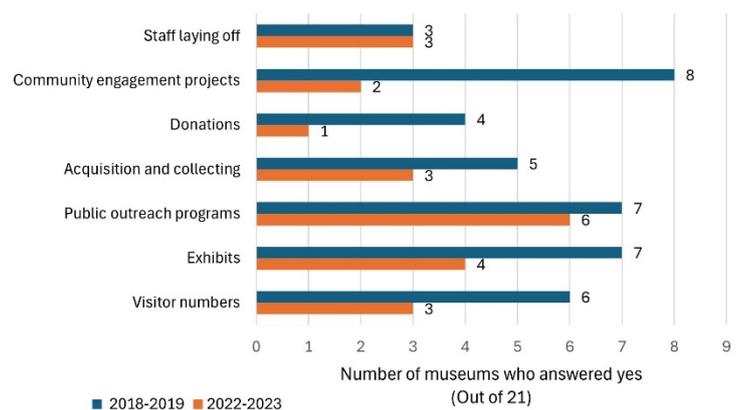


Figure 2.1.7. - Aspects Impacted by the Decrease in Funding (Africa)

A major emerging trend was the impact of the decreased funding on staff. The national museum of Tanzania reported laying off 20% of its staff as a result of decreases in funding in the pre-pandemic period. Similarly, both the Musée Communal Sogossira SANON and the Musée de l’Eau stated that staff had to be

discharged due to decreases in public funding. For the Phuthadikobo Museum, these decreases in funding mean that they cannot offer attractive salaries, and consequently are unlikely to compete on par with institutions benefiting from more secure funding. However, during the pandemic, both the Georges OUEDRAOGO Music Museum and the Afrikaans Language Museum and Monument prioritised staff salaries within their budget. They did not state whether this was done at the expense of other sectors of their operations.

The use of public funding is a delicate point, complex and excessively long execution times which do not correspond to realities on the ground.

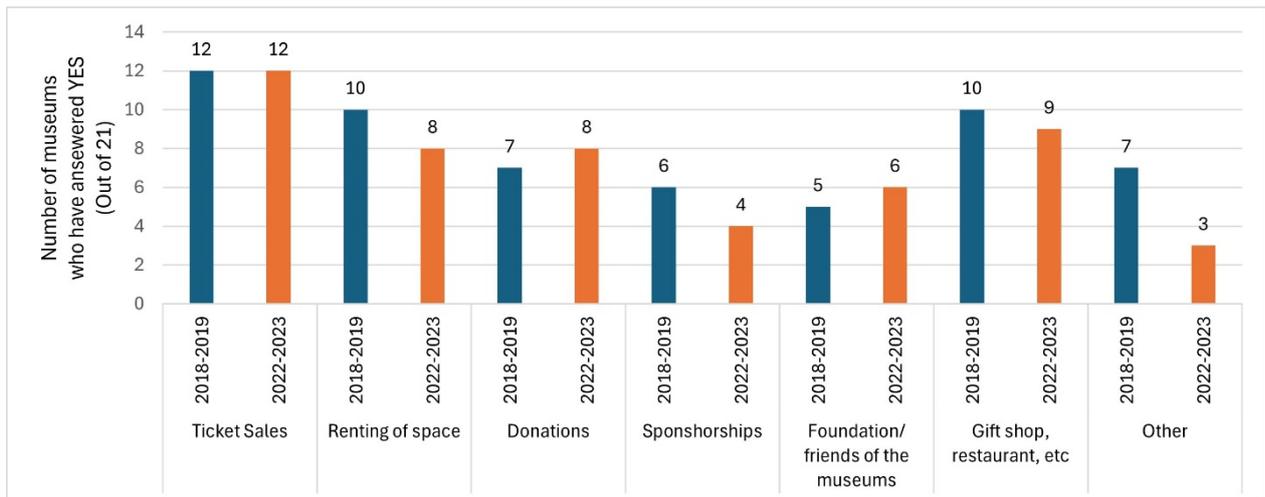


Figure 2.1.8. – Autonomous Revenues Generated by the Responding Museums (Africa)

Clearly, the decline in public funding has led to several operational difficulties for African museums, significantly impacting their ability to function effectively. Thus public funding has not kept pace with the growing operational needs of these institutions, compelling them to seek alternative funding sources to sustain their activities.

2.1.3 Adapting To Funding Challenges

To cope with reduced government funding, museums have had to increase their reliance on self-generated income to remain operational and relevant in the face of declining public funding. Notable strategies include the pursuit of corporate sponsorships, as well as revenue from ticket sales, venue hire, and donations. Although as we can see in Figure 2.1.8., the use of these strategies has declined since the pandemic period.

Both the Seychelles National Museum and the National Museum of Tanzania have considered increasing entrance fees to offset the funding decrease. No indication was given whether those measures have been adopted. Interestingly even La Motte Museum, a private institution funded by a company and its owner, now relies increasingly on autonomous revenues, such as from fundraising and patrons. This museum is also shifting to online exhibition and volunteer work in case current funding proves to cover only operating costs.

Forming international partnerships and securing global grants are also essential strategies for African museums. Collaborating with international institutions provides additional funding and resources, as well as opportunities for joint exhibitions and research projects. The National Museum of Kenya has partnered with international organizations to obtain grants for conservation and educational initiatives, enhancing its capacity to preserve and promote cultural heritage. The National Museum of the Gambia has entered into a partnership with UNESCO to cope with the funding decrease. On a local scale, the Musée Mgr Joanny Thevenoud has established partnerships with 22 museums throughout Burkina Faso and Mali, while the Musée de l'Eau has sought financial help from embassies and financial organizations. Cross-institution collaboration can be highly valuable for sharing expertise, as well as fostering a spirit of cooperation.

Community engagement is another vital strategy for building support and ensuring sustainability. Strengthening relationships with local communities through outreach and educational programs helps museums build a loyal visitor base, attract local support and interest children in museums from a young age. The KwaZulu-Natal Museum in South Africa engages with local schools and community groups through educational programs and cultural events. The Georges OUEDRAOGO Music Museum has initiated an awareness programme in schools and the media to promote the museum and curb decreasing visitor numbers. Such initiatives can foster a sense of ownership and pride among community members, encouraging them to support their local museums.

The pandemic made the staff aware of emphasising on digitisation with regards to their collection but it is not ONLINE yet.

Digital initiatives have also become a crucial component of the strategy to diversify income and maintain public engagement. Many museums have developed online platforms to showcase their collections and reach a broader audience. For instance, the Georges OUEDRAOGO Music Museum in Burkina Faso collaborated with the African Heritage School to provide virtual training for its staff with the aim of enhancing their skills and ensuring the continuity of its programs during the pandemic. This shift to digital platforms has helped maintain visitor engagement and operational continuity during times of restricted physical access. Thus digital initiatives ensure that museums remain accessible to the public.

In summary, the decrease in funding, which is not a new phenomenon for African museums, has stimulated museums to reach outside their walls and towards their local communities in order to find support. Adapting to funding fluctuations requires outreach and sustained engagement strategies that can secure community support, as well as new methods of generating income while maintaining accessibility.

2.1.4 Key Findings

INNOVATIVE APPROACHES

- Fundraising for specific projects: Writing and submitting fundraising proposals.
- Forming international partnerships and securing global grants.
- Building support through local community engagement (community-based projects) and educational programs.
- Digital initiatives: Developing online platforms to showcase collections and maintain public engagement.

Museums in Africa face significant challenges due to declining public funding ever since the pre-pandemic period. This necessitates a shift towards diversified revenue sources and innovative funding models to ensure their sustainability and continued contribution to cultural heritage and public education. The innovative strategies and diversified funding approaches being adopted offer a path forward. Building strong community connections and forming international partnerships, as well as persistent advocacy for increased government support remains essential for the long-term sustainability of museums. This balanced approach helps sustain cultural heritage while adapting to modern economic challenges and opportunities. African museums can navigate the current financial landscape and continue to fulfill their cultural and educational missions, playing a vital role in preserving and promoting cultural heritage and public education.

2.2 East Asia

2.2.1 Overview

Museums in Japan, China and South Korea expanded rapidly in the last quarter of the 20th century and their educational function was strengthened, particularly in relation to national identity.

Chinese museums are part of the socialist administrative mode and their number has grown exponentially since the 1980s (Bollo and Zhang 2017),¹⁴ gradually becoming commercial entities within the market economy. Today, the latest statistics indicate that there were 6,565 museums in China in 2022,¹⁵ 90% of which were open to the public free of charge.¹⁶

There are two major categories of museum institutions in China : state-owned and non-state-owned museums (respectively : 68% and 32% of museums). In terms of funding, state-owned museums are government-sponsored public institutions and are classified according to three categories :

1. Class I : fully funded and non-profit.
2. Class II : differential allocated and allowed to generate profits from their activities or programs.
3. Class III : self-supporting public institutions, which must generate the revenues necessary to cover operation costs, including employee salaries and bonuses.

Japanese museums, meanwhile, experienced strong growth from the 1970s onwards, supported through heavy investments by local authorities (Berthon 2020). The burst of an economic bubble in the early 1990s led to crises for museums and changes in cultural policies. Museums in Japan have since become communicational and commercial spaces (Berthon 2020) and are divided into three categories : national museums (2.7%), which operate under the aegis of the central administration; public museums (71.7%), which are established by prefectures, cities, towns and villages; and private museums (25.6%) established by foundations, incorporated associations, companies or individuals.¹⁷

In South Korea, the growth of museums in the 1980s was linked to political democratization (Park and Kim 2019). They acquired the function of social spaces and became increasingly professionalized. Following an economic crisis in 1997, a more neo-liberal model of operations took root (Park and Kim 2019).¹⁸ According to our expert, there

¹⁴ Their number tripled between 1980 and 1990 (Bollo and Zhang 2017, 28) and the growth has continued.

¹⁵ State Administration of Cultural Heritage, May 18th, 2023 (as per the regional report for China).

¹⁶ According to law (No. 11 document of Cultural Relics and Museums, 2010), local governments are mandated to allocate certain funds to guarantee free entrance to non-state-owned museums.

¹⁷ Our sample did not include prefectural museums, but due to cuts in the public sector, museums have adopted private sector management methods to improve efficiency (Taniguchi 2021).

¹⁸ South Korea's legal framework for museums was established by the Museum Act of 1984. Notably, the subsequent Museum Act of 1999 implemented business rationalization in museum management (Park and Kim 2019,103).

are over 500 museums in South Korea, categorized as national, municipal and private institutions.

Our sample was limited to East Asia, namely China, Japan and South Korea. This limitation was due to the withdrawal from the project of our initial expert for Asia and the limited time this left to find a suitable replacement. Therefore our sample covers only East Asia and includes 16 museums :¹⁹

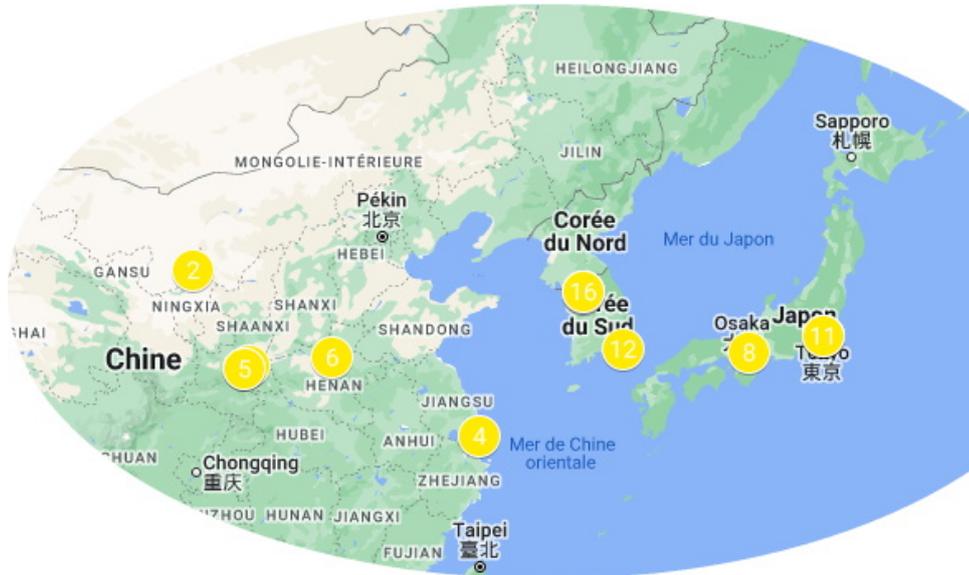


Figure 2.2.1. - List and location of responding museums (Eastern Asia)

1. Emperor Qin Shihuang’s Mausoleum Site Museum (China)
2. Ningxia Museum (China)
3. Shaanxi History Museum (China)
4. Shanghai Museum (China)
5. Xi’an Quijiang Museums of Fine Arts (China)
6. Zhengzhou Museums (China)
7. Idemitsu Museum of Arts (Japan)
8. Kyoto National Museum (Japan)
9. National Art Center (Japan)
10. National Museum of Modern Art (Japan)
11. Sen-oku Hakukokan Museum (Japan)
12. Busan Museum (South Korea)
13. National Folk Museum of Korea (South Korea)
14. National Museum of Korea (South Korea)
15. National Museum of Korean Contemporary History (South Korea)
16. Seoul Museum of History (South Korea)

¹⁹ The data presented for these museums was collected by Prof. Yang Jin, assisted by Ma Jinwen, JiaYutong, Hou Zelin, Tan Zhongyan, and Liu Nianqing. For a complete breakdown of museums in Asia, see Annex III.

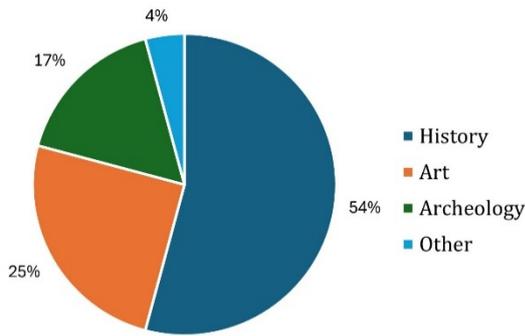


Figure 2.2.2. - Types in Responding Museums (Eastern Asia)

Museums were asked to choose one or two types to describe themselves. 24 types were chosen in Asia. The 16 museums in the sample made a total of 24 choices of type. The % reflects that number (24).

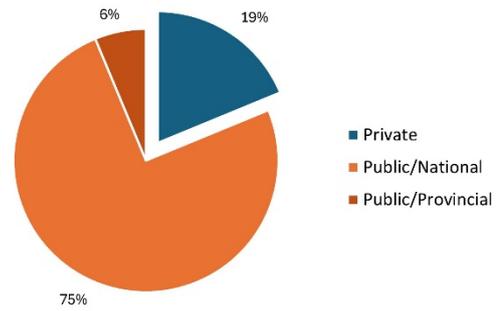


Figure 2.2.3. - Legal Status of Responding Museums (Eastern Asia)

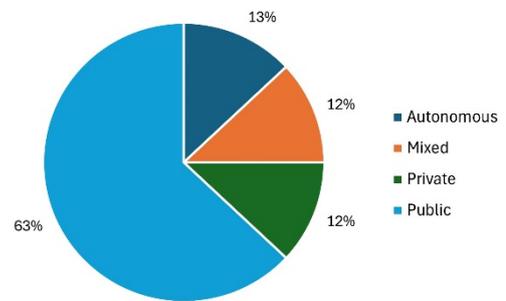


Figure 2.2.4. - Funding Sources of Responding Museums (Eastern Asia)

2.2.2 Funding Fluctuations

In this region, the funding situation for the surveyed museums did not undergo distinct change through the COVID period. Public funding remained stable (Figure 2.2.6.) and less than 20% of respondents reported a decrease before or during the COVID pandemic. For 2022-2023, that proportion rose by half (See Figure 2.2.5.), with 31% of museums reporting a decrease in public funding. However, generally, funding for museums in East Asia has stayed at a steady level in recent decades.

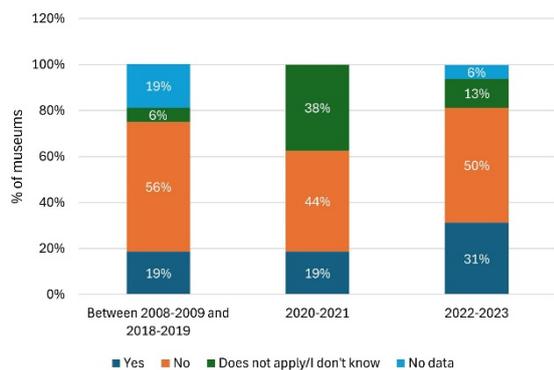


Figure 2.2.5 – Breakdown of Public Funding Decrease in Responding Museums (Eastern Asia)
To the question : Did public funding decrease?

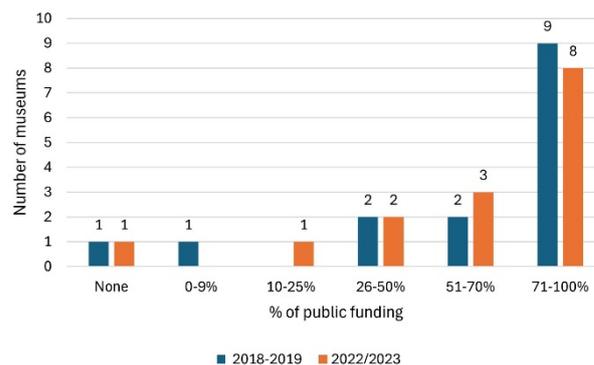


Figure 2.2.6. – Percentage of Public Funding in Responding Museums (Eastern Asia)
To the question : What percentage did public funding make up for your museum?

In South Korea, museums such as the National Folk Museum of Korea and the National Museum of Korean Contemporary History have continued to rely heavily on government funding. Meanwhile the Busan Museum and the Seoul Museum of History have relied completely on municipal funding. While the COVID-19 pandemic caused a sharp decline in visitor numbers and its associated revenues, government funding remained stable, allowing the museums to pivot towards digital engagement. Therefore, autonomous revenues are not considered a priority among the surveyed museums.

The reduction in public funding is most pronounced in Japan. While there was an increase in funding during the pandemic, decreases both before and after left museums to their own devices in recouping their losses. We can posit that most museums affected by the decrease shown in Figure 2.2.5., are from Japan. For example, institutions such as the National Art Center in Tokyo have seen its operating subsidies decline by nearly two-thirds since 2008. In fact, from the perspective of income and expenditures, in 2018, the average total income of museums in Japan was ¥902,600, but the median was ¥136,000, equivalent to the price of a luxury imported car. This suggests that a minority of museums receive the majority of income, thus skewing the average, while the median more accurately reflects the actual situation of Japanese museums.²⁰

This financial constraint has impacted museums in various ways. For example, The Kyoto National Museum struggles to maintain its collections and infrastructure due to budget cuts.

Unlike Japan, China has maintained relatively stable public funding for state-owned museums, with strategic increases during challenging economic periods to ensure that institutions remain operational and accessible to the public. Non-state-owned museums often face more variability in public funding, relying on competitive grants and local government support, which can be unpredictable. The Xi'an Quijiang Museums of Fine Arts, a non-state museum, reported that a change in administrative measures regulating

²⁰ As per the regional report for Japan, by Prof. Yang Jin.

non-state museums caused a decrease of around 20-30% in its funding. Similarly, the Shanghai Museum, a public museum, reported a decrease in public funding, but said that autonomous revenues surpassed public funding for the first time in 2022. These museums are encouraged to enhance their core competencies and operational efficiencies to attract more funding. Overall, a majority of public museums surveyed in China reported constant increases over the past ten years.

Stable, and often increased, public funding for state-owned museums in China has allowed operations to continue without significant disruptions. It has supported ongoing exhibitions, maintenance of collections, and the expansion of digital initiatives. Already during the pandemic, Chinese museums made headway in developing virtual and digital programming, and have continued to do so since. The Ningxia Museum has increased its online presence through online exhibits, live broadcasts on social and streaming platforms, as well as platforms to assist offline activities. The Shaanxi History Museum has even introduced a virtual reality (VR) exhibition. Similarly, investments in digital platforms to showcase collections online have been significant in China, particularly during the COVID-19 pandemic, and have reached a global audience.

There is a need for museums to improve the quality of their exhibitions, to participate actively in various project competitions and to increase their competitiveness, thereby attracting more public funding.

The situation varies between countries and between museums within each country. While funding remained stable in China and South Korea, Japan was hit hard by the decrease in funding. Government responses impact museum management and influence the directions they take in terms of alternative funding practices.

2.2.3 Adapting To Funding Fluctuation

Even in cases where there has been no perceived decline in public funding, museums in South Korea, Japan, and China are increasingly relying on a mix of revenue sources, including ticket sales, private donations, sponsorships and commercial activities (Figure 2.2.7.).

In South Korea, the turn towards digital and virtual tools had begun before the pandemic and surveyed museums all supplemented their digital programs through various funding schemes during the COVID crisis. The National Folk Museum of Korea has expanded its virtual and augmented reality (VR/AR) exhibitions with government support to attract more visitors and has maintained its existing digital programming and virtual media initiatives. The National Museum of Korea has enhanced digital engagement through virtual exhibitions and online educational programs, diversifying its income sources with an increased focus on online visitor engagement. Thanks to these initiatives facilitating public access, the museum reported an increase in financial income and visitor numbers for 2022. Even post-pandemic, almost all programs and events taking place at this museum have been replaced by online offerings.

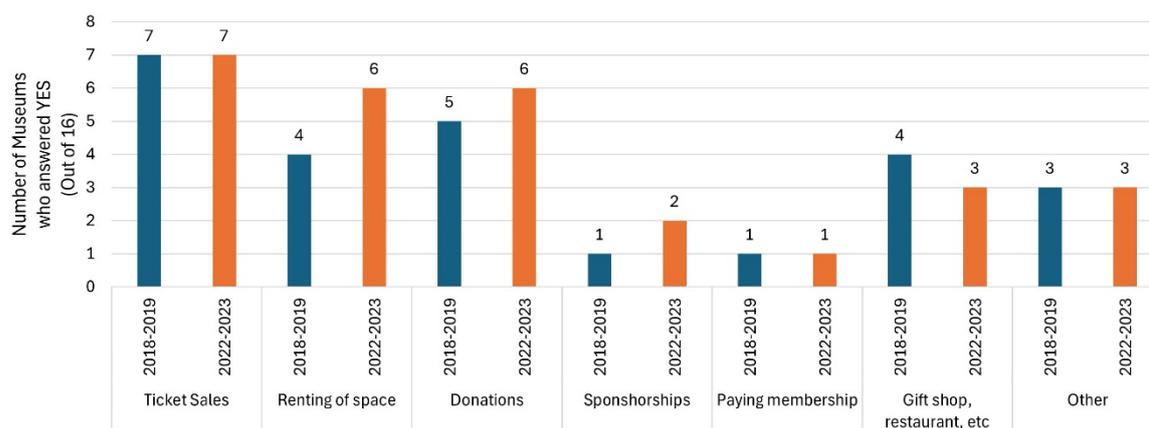


Figure 2.2.7. – Autonomous Revenues Generated by the Responding Museums (Eastern Asia)

A significant in-person initiative was nonetheless implemented by the Museum of Korean Contemporary History, which opened its doors to visitors at night in an effort to increase accessibility. This initiative not only maintained visitor engagement but also attracted new audiences, such as professionals seeking cultural experiences outside regular hours through night tours.

In Japan, museums have diversified their revenue sources within various approaches. The National Museum of Modern Art in Tokyo, and the Kyoto National Museum are boosting revenues through ticket sales, grants and donations. The National Art Center in Tokyo, despite a decline in operating subsidies by nearly two-thirds since 2008, has initiated digital programs such as online exhibitions and virtual tours. The Sen-oku Hakukokan Museum in Kyoto receives 99% of its total donation income solely from Sumitomo Group companies and the Nippon Steel Corporation. Despite this diversified range of financing, public funding remains crucial, accounting for between 50% and 100% of public museum budgets.

Improving the efficiency of business operations, providing exhibition venues, securing and increasing own income, and providing a comfortable viewing environment.

Other initiatives include various forms of partnerships. The Idemitsu Museum of Arts collaborates with other museums to organize sponsored cooperative exhibitions. The National Art Center in Tokyo has partnered with two other art museums to offer reduced entry prices; the scheme aims to attract more visitors and increase revenue by encouraging cross-visitation between participating museums. This type of collaboration is crucial for developing the museum network and functions as an effective promotional strategy. At an international level, the National Museum of Modern Art and the Kyoto National Museum have collaborated with Google Art to launch an online platform through which visitors can remotely browse the museums' exhibits. The National Art Center in Tokyo increased its admission fee revenue by expanding its public exhibitions and embracing entrusted income. While they saw a significant decrease in public funding

during the pandemic, Japanese museums managed to offset the shortfall through innovative digital initiatives and partnerships

In China, state-owned museums use stable funding to maintain free entry, ensuring steady visitor numbers and public engagement. However, since public funding is so robust, there does not appear to be the same urgency as elsewhere to develop autonomous revenue, although they are encouraged to do so.

Nonetheless, non-state-owned museums in China have had to innovate and find alternative revenue streams to supplement less predictable public funding. The Xi'an Quijiang Museums of Fine Arts actively seeks private and corporate donations, competes for cultural grants, and has increased its commercial activities in the form of museum shops, cafes, and event hosting. The state-owned Shanghai Museum has secured numerous corporate sponsorships for exhibitions and educational programs.

Museums should be prepared, proactive for the uncertain future either by downsizing consumption or broadening sources of income and reduced expenditure. However, every move is quite challenging.

The need for museums to generate autonomous revenues varies between countries. The quality of government funding greatly impacts museums' drive to implement such practices. While it seems that government bodies encourage museums to secure autonomous income irrespective of the level of their public funding, it appears that most institutions become proactive in this respect only when public funding becomes scarce.

2.2.4 Key Findings

INNOVATIVE APPROACHES

- Mix of revenue sources: private donations, corporate sponsorships, and commercial activities.
- Domestic and international collaborations and partnerships.
- Digital and virtual initiatives: Developing digital tools, online exhibitions and virtual tours.
- Efficiency and proactive planning for the future: Improving business operations, prioritization, reducing expenditures.

Japan has seen a significant decline in public funding for museums over the past decade, significantly impacting their operational capabilities. Transformation has become a critical strategy, with museums developing online platforms to maintain and expand their audience outreach, ensuring continued engagement and financial stability despite funding cuts. In South Korea, stable government support has been crucial for museums, allowing them to implement significant digital initiatives and community engagement programs. This has enabled museums to demonstrate resilience, adapting through diversified funding strategies that include both public and private sources. By contrast, China's approach to museum funding represents a unique model. State-owned

museums benefit from relatively stable public funding, with strategic increases during economic downturns to ensure operational stability. This sustained support has enabled Chinese museums to maintain activities without significant disruptions. However, non-state-owned museums in China face more variability in public funding and must rely on competitive grants, private donations and self-generated income.

In summary, while Japanese museums grapple with reduced public funding and turn to innovative revenue models, South Korean and Chinese institutions benefit from stable government support, leveraging digital transformation and community engagement to sustain operations and uphold their cultural missions.

2.3 Europe

2.3.1 Overview



Figure 2.3.1. - List and location of responding museums (Europe)

Two thirds of European museums are public, according to the European Group on Museum Statistics (EGMUS), although this statistic does not take into account all European countries.²¹ Public museums are predominantly funded by local or regional administrations, while a smaller portion is state-owned (14%). According to Xavier Roigé, author of the regional report for Europe, although there is a wide variety of public policy on museums across Europe, most European museums are publicly funded. Indeed, based on EGMUS data, museum funding originates mainly from public funds (61.8%), other unspecified sources (28.8%) and receipts (9.6%). However, as the European Museum Academy points out, there is a great diversity of structures and types of

museums in Europe, making it difficult to synthesize representative data (European Museum Academy 2023, 3).

- | | |
|----------------------------------------------------------------------------------|-------------------------------------------------------|
| 1. Musées Royaux des Beaux-Arts de Belgique (Belgium) | 16. Museo Arqueológico Provincial (Spain) |
| 2. University of Tartu, Museum of Natural History and Botanical Garden (Estonia) | 17. Museo de la Evolución Humana (Spain) |
| 3. Musée de la Romanité (France) | 18. Museo Guggenheim Bilbao (Spain) |
| 4. Institut du Monde Arabe (France) | 19. Museo Nacional de Antropología (Spain) |
| 5. Museo Nazionale del Cinema (Italy) | 20. Museu Cultures del Món (Spain) |
| 6. Museo Nazionale dell'Automobile (Italy) | 21. Museu de l'Exili (Spain) |
| 7. Van Gogh Museum (Netherlands) | 22. Museu del Ferrocarril (Spain) |
| 8. Casa-Museu Abel Salazar (Portugal) | 23. Museu del Montseny (Spain) |
| 9. Museu Municipal de Tavira (Portugal) | 24. Museu del Pueblu Asturiano (Spain) |
| 10. Casa Batlló (Spain) | 25. Museu del Ter (Spain) |
| 11. Casa Museo Pau Casals (Spain) | 26. Musèu dera Val d'Aran (Spain) |
| 12. Ecomuseo La Ponte (Spain) | 27. Museu Nacional d'Art de Catalunya (MNAC) (Spain) |
| 13. Ecomuseu de les Valls d'Àneu (Spain) | 28. Museu Nacional de la Ciència i la Tècnica (Spain) |
| 14. Fundació Miró (Spain) | 29. The Vasa Museum (Sweden) |
| 15. Museo Arqueológico de Córdoba (Spain) | 30. Black Country Living Museum (United Kingdom) |
| | 31. Natural History Museum (United Kingdom) |

²¹ Statistics available on the EGMUS website (EGMUS, n.d.).

Let us note from the outset that the European sample in the survey shows an overrepresentation of institutions in Spain because the author of the regional report is based at a Spanish university and is particularly well informed on the country's museum network. Overall, the European sample includes 31 museums, a relatively high number, but it is almost exclusively representative of Western Europe :²²

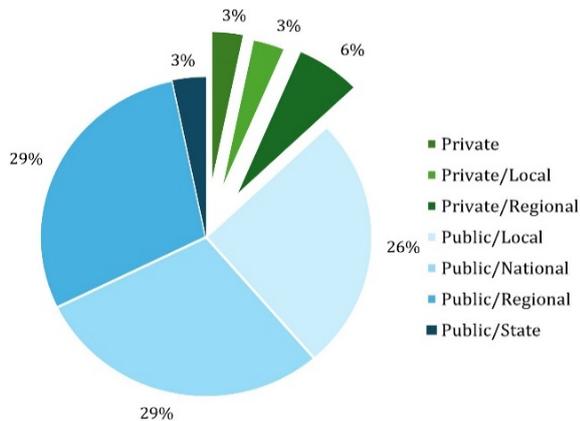


Figure 2.3.3. - Legal Status of Responding Museums (Europe)

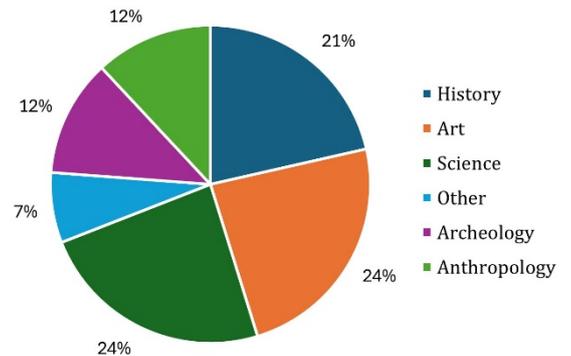


Figure 2.3.2. - Types in Responding Museums (Europe)

Museums were asked to choose one or two types to describe themselves. The 31 museums in the sample made a total of 24 choices of type. The % reflects that number (24).

2.3.2. Funding Fluctuations²³

The successive crises of the past decade have led to substantial cuts in public funding for museums across Europe. Continuing the trends of the late 20th century, there was generally a period of growth and expansion of museums. During this period, there were two types of museums : larger museums (Bilbao and the Louvre expansion) and local museums. The latter had fewer community ties, and were less prepared to withstand the impact of the 2007-2008 crisis.

The 2007-2008 economic crisis occasioned a substantial decrease in public and private funding. The effects varied widely between different countries, depending on the management models and the types of museums,

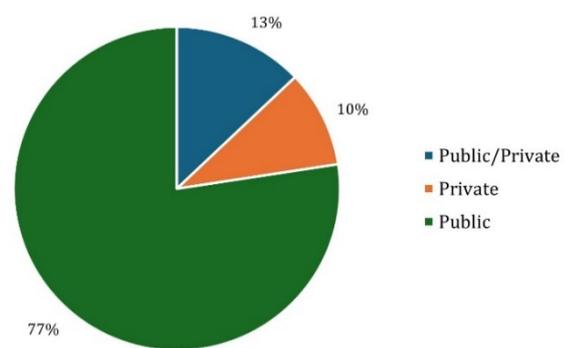


Figure 2.3.4. - Funding Sources of Responding Museums (Europe)

²² The data for the regional report for Europe was prepared by Xavier Roigé, with the collaboration of Alejandra Canals Ossul. For a full breakdown of the responding museums, see Annex III.

²³ The chronological presentation of museum funding fluctuations in Europe is taken from the regional report prepared by Xavier Roigé.

as well as the extent of significant cutback policies. Countries like Greece and Spain experienced severe reductions in cultural budgets.

The museums benefiting from the best conditions to withstand the crisis were large institutions with substantial tourism revenues and small museums with limited resources but with strong community ties. The conditions were harsher for many local museums. Although budget reductions affected all museums, the crisis revealed that some institutions were more important than others for society at large, likely due to their substantive quality and ability to engage the public. Private funds were generally considered to represent complementary financing, not as a way to rescue public institutions.

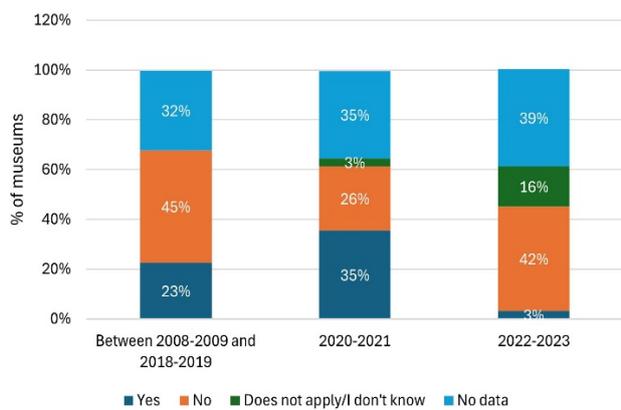


Figure 2.3.5. – Breakdown of Public Funding Decrease in Responding Museums (Europe)
To the question : Did public funding decrease?

However, from 2010 to 2020, museums began a slow recovery, with a gradual return of public investment and exploration of alternative funding sources, such as tourism and marketing. As we can see in Figure 2.3.5., the decrease in public funding was less important going forward. More visitors, whether new or returning, meant more revenue. For several countries, the trend was toward low or reduced growth in public funding. In some cases, funding was concentrated on state museums, with greater budget restrictions on regional and local museums.

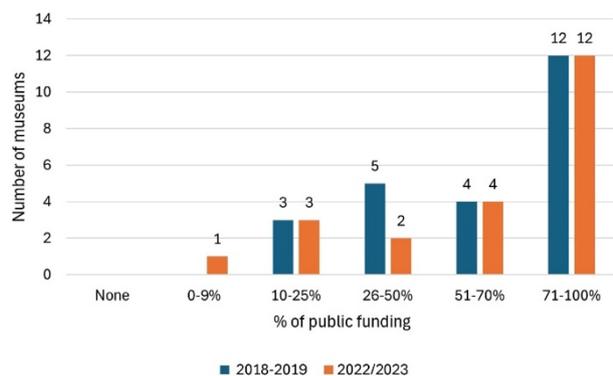


Figure 2.3.6. – Percentage of Public Funding in Responding Museums (Europe)

The COVID-19 pandemic (2020-2022) brought another major challenge. Museums closed their doors and faced drastically reducing income. With a 6% decrease in tourism, museums located in tourist areas were hit harder than those elsewhere. The EU mobilized a variety of funds and programs for economic recovery. However, the reaction of public administrations was very different than it had been to the 2007-2008 crisis. In general, governments maintained and even increased their funding of museums. As evident in Figure 2.3.6., funding before and after the pandemic remained highly consistent.

In 2024, museums are still struggling to return to pre-pandemic visitor numbers and face additional financial pressures from inflation and high energy costs. Beginning in 2023,

despite higher revenues from a relative increase of visitors, inflation and high energy costs posed a tough challenge for many museums, which in many cases could not compensate for the increase in operating costs. In some cases, these challenges have had a greater impact than did COVID. Many museums have had to take radical measures, such as closing for days at a time, to save money and offset the increase in energy costs. While some countries have managed to stabilize or slightly increase funding, many museums face ongoing financial constraints.

2.3.3 Adapting To Funding Challenges

At the beginning of the COVID crisis, the memory of the 2007-2008 crisis was still vivid for European museums, which generated much fear, if not of the pandemic as such, certainly of its long term impacts. Yet, unlike in 2007, public administrations responded not with cuts, but instead with compensation measures. Public funds did not decrease, according to most museums, while some indicate that they even increased. Despite this, there was an imbalance in how the decrease was perceived as private museums were affected more than public museums (this explains the numbers shown in Figure 2.3.5., since private museums experienced more pronounced decreases). In the opinion of the museums surveyed, authorities implemented measures to compensate for the reduction of their own income, which allowed museums to cope with these losses with greater guarantees. Moreover, most of the surveyed museums (70%) estimated that observed decreases did not imply changes in management models, although a few signaled significant impacts on exhibitions, publications and events. Museums still faced operational challenges, including staff reductions, fewer exhibitions and deferred maintenance (Figure 2.3.7.), most notably in the post-pandemic period. However, respondents stated that despite these reductions, they were able to continue their activities.

Museums, whether publicly or privately owned, must have a vocation for public services and commitment to the community. The support of public administrations should be greater. At the same time, it is necessary to improve the regulatory framework with laws that encourage sponsorship and patronage.

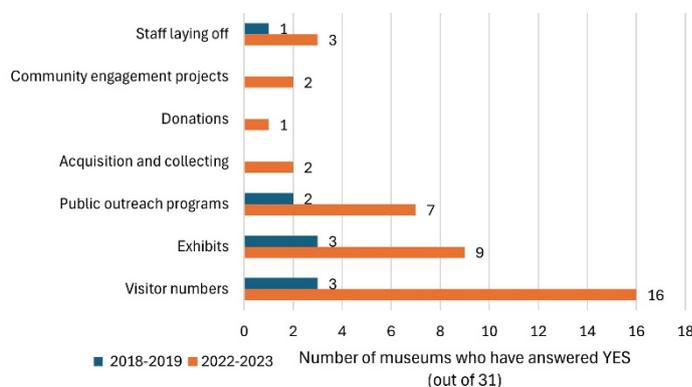


Figure 2.3.7. - Aspects Impacted by the Decrease in Funding (Europe)

The museums surveyed indicate that in the years immediately after the 2007-2008 crisis there were cuts to temporary staff, but that overall staff numbers remained the same. Similarly, during the COVID crisis, there were few decreases in overall staffing, as this was one of the financing priorities. The most severe impact for museums were decreases in exhibitions, activities and visitor numbers (Figure 2.3.7.). With museum closures lasting

many weeks and subsequent restrictions on visitor numbers once they reopened, activities were often transposed online, postponed, or simply cancelled. The acceleration of the ongoing process of digitization and diversified use of digital communication also represent enduring consequences of the COVID crisis.

Most museums consider that income lost due to the reduction in public funding has not been compensated through other sources of income or, where such was the case, the compensation has been only partial. Despite this, there are no major innovations in terms of funding, as reported by museums in the European sample. The majority of respondents tend to agree that the pandemic was a parenthesis and that its effects on their operations have not been long-term (with the exception of digitalization, teleworking and ongoing reflections about museums’ role in society). This view appears to have stalled further reflection on diversifying, expanding or restructuring museums’ sources of income. Overall, very few museums have sought new sources of income (Figure 2.3.8.), with the notable exception of special projects and operational funding. Crowdfunding is the least used external source of income.

Continuous efforts to advocate for increased and sustained government support are essential and often happen through collective actions by cultural institutions and associations. The Network of European Museum Organizations (NEMO) advocates for better funding and policies to support museums across Europe. Similarly, the Swedish and Danish museums associations are very proactive in lobbying their governments for better funding for museums (Ardelius 2022; Rasmussen 2022a).

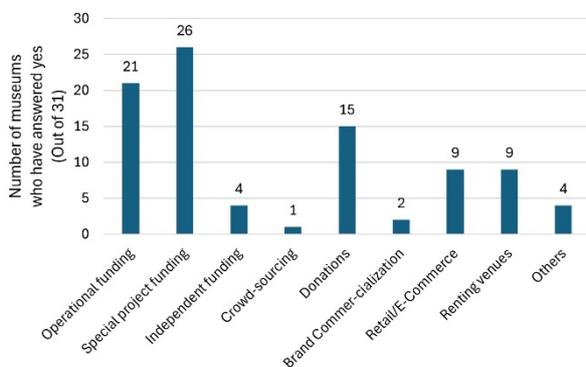


Figure 2.3.8. – Alternative Source of Funding (Europe)

In summary, funding in Europe has fluctuated wildly in recent decades. It appears that the latest crisis will not cause broad changes in the financial models of European museums. It has, however, resulted in a reflection on the place and importance of museums within their communities.

INNOVATIVE APPROACHES

- **Mix revenue sources:** Combining government support with private donations and corporate sponsorships.
- Leverage ticket sales and retail operations.
- Actions and initiatives that increase museums' presence on social networks (creation of mobile experiences).
- **Digital and virtual initiatives:** Developing digital tools, online exhibitions and virtual tours.
- **Community engagement:** Strengthening ties with local communities through outreach and educational programs and building a loyal visitor base, attracting local support through community-focused initiatives.
- **Operational adaptations and resilience:** Optimization and prioritizing staff retention.

2.3.4 Key Findings

Museums in Europe have traditionally relied heavily on public funding. Until 2007, the sector experienced growth with increasing public budgets and significant investments in infrastructure projects, such as the Guggenheim in Bilbao (Chong 2019). However, the 2007-2008 financial crisis caused severe cuts in government funding, leading to the closure of some museums and reduced services in others, with particularly severe impacts for local museums. Despite a degree of recovery after the COVID-19 pandemic, European museums continue to face funding instability, prompting them to explore diversified revenue sources and innovative funding models.

2.4 Latin America and the Caribbean

2.4.1. Overview

In Latin America and the Caribbean (LAC), the new and social museologies strongly shape museum practices. The UNESCO Round Table of Santiago de Chile in 1972 introduced the concept of the Integral Museum as a space for a new type of action designed to provide communities with an overview of their material and cultural environment. The concept of the Integral Museum became the basis for the international movement of *La Nouvelle Muséologie* (Varine 2000). The revolutionary context in which these innovative experiences emerged led to considerable transformations in the museum field. Several of the principles of the New Museology can be found today in Sociomuseology or, as preferred in Brazil, Social Museology, “as a new paradigm that promotes an epistemological rupture, implying a change in the conception of the world” (Britto 2019, 102). Several museum models coexist in the LAC territory, but all are strongly engaged in social responsibility and ethical commitment to diversity, which explains the presence of many community museums.²⁴

The sample is weighted towards Brazilian museums since the expert report’s author is based in Brazil and is especially familiar with its museum network. The sample for Latin America and the Caribbean includes a total of 23 museums :²⁵



Figure 2.4.1. - List and Location of Responding Museums (Latin America and the Caribbean [LAC])

²⁴ As per the regional report for Latin America and the Caribbean, by Luciana Menezes de Carvalho.

²⁵ Data for the Latin America and the Caribbean regional report was collected by Luciana Menezes de Carvalho, assisted by Luciene Pereira da Veiga Givisiez and Luiza Henriques Costa Pereira. For the full breakdown of museums in the region, see Annex III.

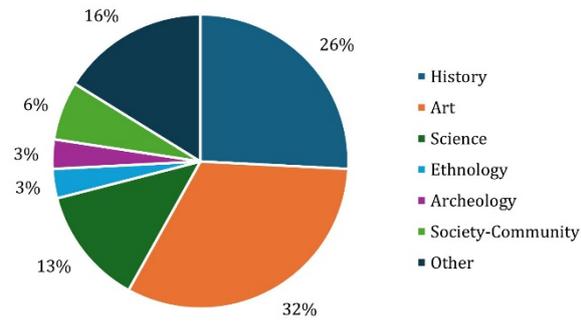


Figure 2.4.2. - Types in Responding Museums (LAC)
 Museums were asked to choose one or two types to describe themselves. The 23 museums in the sample made a total of 31 choices of type. The % reflects that number (31).

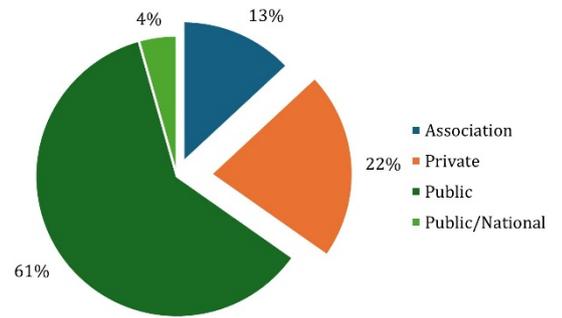


Figure 2.4.3. - Legal Status of Responding Museums (LAC)

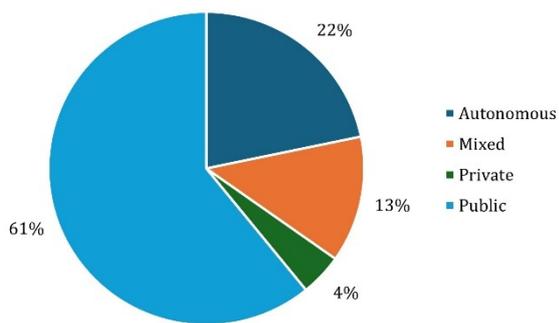


Figure 2.4.4. - Funding Sources of Responding Museums (LAC)

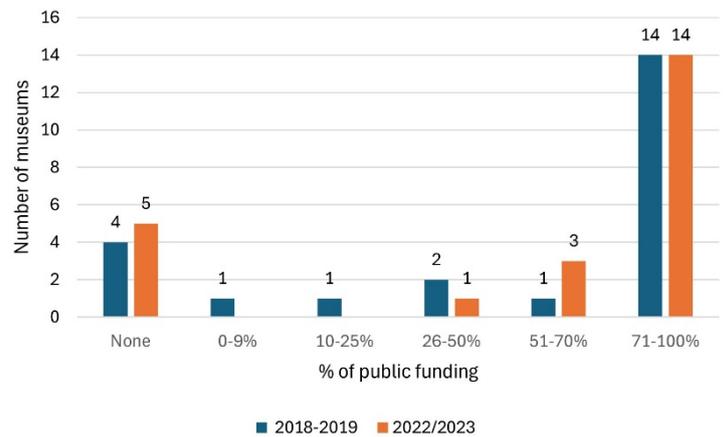


Figure 2.4.5. - Percentage of Public Funding in Responding Museums (LAC)

To the question : What percentage did public funding make up for your museum?

2.4.2. Funding Fluctuations

Public funding has decreased since 2018 for institutions that received less than 50% of their funding from public sources, while those who obtained between 70% and 100% of their revenue from public funding seemed to fare better. Compared with other geographical areas, the institutions in the LAC sample show two extremes in terms of public funding. In 2022-2023, 14 were predominantly publicly funded, while 5 received no public funding at all (Figure 2.4.5.).

Before and during the pandemic nearly half of the responding museums noted a decrease in public funding, with only 25% noting an increase. The number of recorded decreases goes down after the pandemic, but this may be due to punctual and one-off funding, more so than a real prolonged increase in funding (Figure 2.4.6.).

In several countries, museums have experienced substantial reductions in government funding due to economic crises and shifting political priorities. Museums in Brazil and Argentina, for example, have faced severe budget cuts as governments reprioritize spending amidst economic challenges. Both the Museo Histórico Sarmiento and the Museo Nacional Casa del Acuerdo confirm this by stating that fluctuations on funding depend on who is in government at a given time.

Since the changes of government with different political colors, the modes of surrender have been modified

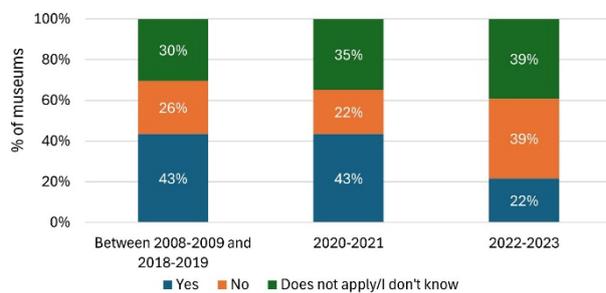


Figure 2.4.6. – Breakdown of Public Funding Decrease in Responding Museums (LAC)
To the question : Did public funding decrease?

Similarly, the institutions’ status plays a role in their access to funding. In 2019, the Museu de Arqueologia e Etnologia da UFPR (Federal University of Paraná) saw its funding decrease by 25%, due to cuts in funding for federal universities. This situation was not remedied until 2023, when a budget with no cut was presented, meaning a 50% increase. Even the Museu Nacional do Rio de Janeiro has struggled to maintain basic operations following significant budget reductions and a devastating fire in 2018.

At the other end of the spectrum, the Museo Soumaya, in Mexico, is a private institution and does not get any public funding. The Museu das Remoções, a community museum, has never received public or private funding, as its status bars it from meeting the conditions to participate in public calls. This is further impacted by the fact that they are still undergoing an institutionalization process. The Museu de Arte de Belém further exemplifies the importance of specific classifications since, as a municipal museum, they suffer from the absence of cultural policies from certain federal administrations. Thus, public funding can vary tremendously depending on individual museums’ characteristics.

The Museu Histórico do Tocantins offers another example. From 2008 to 2015, they were part of the Cultural Foundation of the State of Tocantins (FUNCULT). Through this organisation, the museum could access various resources to support its operations. However, after the organization folded, the situation did not improve until 2019. This example stresses the importance of a strong network of museums, both in terms of funding and expertise sharing.

During COVID, funding was available to ensure the safety of staff (e.g. masks, hand sanitizer) but no additional funding was reported by the surveyed museums. There was an intensification of digital programming in order to maintain contact with communities, but the Museu da Memória e Patrimônio da UNIFAL-MG saw a decrease in voluntary participation and community engagement.

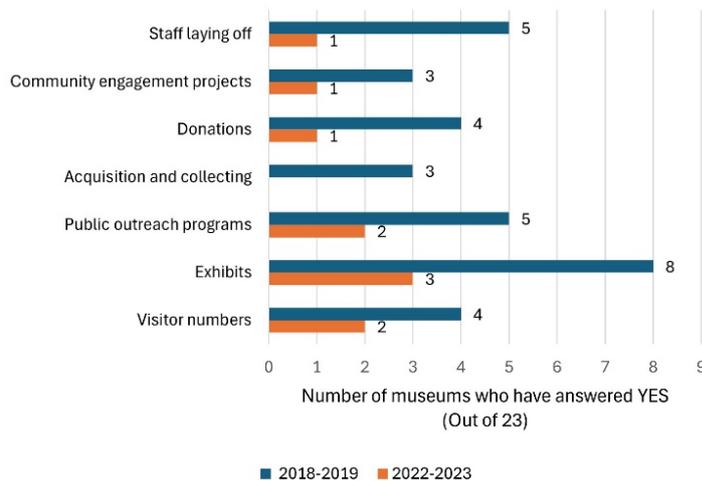


Figure 2.4.7. - Aspects Impacted by the Decrease in Funding (LAC)

This variation in public funding has led to operational challenges, including reduced staff, limited exhibition schedules, and deferred maintenance. The impact started before the pandemic, but respondents pointed out that the decrease in funding started well before the 2020 crisis (Figure 2.4.7.).

Exhibitions were severely impacted even before the pandemic, by lack of resources (mentioned by the Museu de Favela and the Museo

Antropológico y de Arte Contemporáneo). The Museu da Memória e Patrimônio da UNIFAL-MG listed loss of staff as one of the most felt impacts, with museologists having to take on more administrative duties to fill the gaps. The Museo Histórico Sarmiento noted a reduction in education and mediation programs, as did the Museu das Comunicações e Humanidades. For the Museu Histórico do Tocantins, priority was accorded to basic operational needs, for example paying water and energy bills, security and cleaning, and maintenance services. Essentially, museums have had to prioritize essential services and core activities, often at the expense of the development of educational programs and special exhibitions. This has led to a decrease in the quality of the services museums can offer to the public.

2.4.3 Adapting To Funding Fluctuations

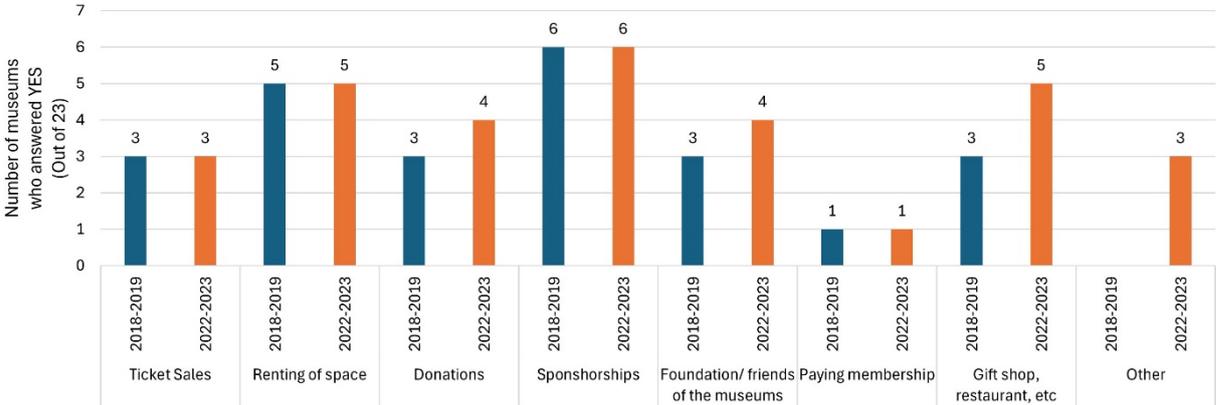


Figure 2.4.8. – Autonomous Revenues Generated by the Responding Museums (LAC)

Museums in the LAC region are increasingly exploring alternative revenue sources, such as private donations, corporate sponsorships, ticket sales, and foundations or friends of museums (Figure 2.4.8.). Other ways of funding included grants and endowment funds, as well as government or other subsidies, or even stand-alone revenue.

Innovative approaches include charging only tourists for entry, as in the case of Museu de Favela, or fundraising, as with Instituto Ricardo Brennand. The Museo Nacional Casa del Acuerdo applied and won a prize from the Fundacion Williams’ Ensayar Museos program. The funding gained helped the museum implement a community outreach project.

Reliance on museum associations, foundations or friends of museums was also reported. Both Casa Geyer and the Museo Nacional de la Medicina Veterinaria can count on active associations to raise a significant part of their funding. The Museu de Arte de Belem once had a very active association of friends employing various fundraising methods, which was unfortunately deactivated in 2017. When developing a new hybrid funding model, the Museo Nacional Casa del Acuerdo created a friends association to help generate private contributions.

In Brazil, many of the surveyed museums referred to a law on tax incentives for donations as having offset decreases in funding.²⁶ Both the Museu das Comunicações e Humanidades and Casa Geyer stated that this law has changed the financial structure of their institutions. The Museu da Vida Fiocruz stated that public funding increased by 25% due to incentives during the 2008-2018 period, but did not specify whether any specific law caused this increase.

²⁶ The Rouanet Law (Lei Rouanet) established the National Programme to Support Culture (Pronac) in Brazil, instituting a tax incentive policy that enables legal entities to deduct a portion of income tax for cultural activities (Fleming 2018).

Seeking support from private entities and corporations has become a vital strategy for financial stability. After a major fire in 2018, the Museum Nacional do Rio de Janeiro developed a new financing scheme, under which contributions to its finances now come not only from the Brazilian government, but also the private sector and foreign governments, such as those of Germany and Portugal. The Museu de Favela has partnered with universities to develop public outreach programs, helping to develop its network and paving the way for future collaborations.

We could carry out more activities if we received some kind of funding.

Finally, the push towards digital engagement has been accelerated, with many museums developing online platforms to reach broader audiences. For instance, the Museo Nacional Casa del Acuerdo hired an expert to develop online content, activities and programming, which various publics could access from home during the pandemic and which continue to be available today. Both the Museu das Comunicações e Humanidades and the Museu do Homem do Nordeste have implemented the digitisation of their collections in order to make them more accessible. A different example of digital engagement comes from the Museo de la Identidad y el Orgullo, in Costa Rica. Launched as an exclusively virtual museum, its online activities were well-suited to the pandemic context. Today, this museum organizes some in-person activities, but operates largely online, without a physical location. Its operational model as a private institution is financed entirely through private donations.

The surveyed LAC museums are highly proactive in finding alternative sources of funding, perhaps because the social environment and economic instability of the region compels them to be more self-reliant than museums in other regions.

2.4.4 Key Findings

INNOVATIVE APPROACHES

- International and cross-sector partnerships: Local and foreign governments, private sector, and universities.
- Private and corporate donations and applying for grants and endowment funds.
- Leveraging ticket sales (dynamic pricing) and retail operations.
- Government subsidies and tax incentives for cultural activities and donations.
- Fundraising through museum associations and friends of museums.
- Digital and online platforms: Developing digital tools, online exhibitions and virtual tours.
- Community engagement: Building a loyal visitor base with free admission and attracting local support through community-focused initiatives.
- Resilience and self-reliance: Optimization and proactivity in finding alternative funding.

Museums in Latin America and the Caribbean operate within a diverse and complex funding landscape. Public funding for museums in this region has been unstable, with significant reductions in some countries due to economic constraints and political shifts. This has necessitated innovative approaches to maintain operations and public engagement. Museums diversify their revenue sources through private donations, corporate sponsorships, ticket sales and merchandising. There is a strong emphasis on digital transformation, with museums developing online platforms to maintain and expand their audience outreach. Building strong community connections and securing corporate sponsorships is crucial for financial sustainability amidst declining public funding. Continuous efforts to advocate for increased and sustained government support are essential and are often carried out through collective actions by cultural institutions and associations.

2.5 North America

2.5.1 Overview

The North American museum network was established at the beginning of the 19th century. The first museums in the United States and Canada were inspired by the Philadelphia Museum, created by Charles Willson Peale in 1786 in the wake of American independence (Alexander et al. 2017). Peale wanted to make his museum the first national museum, but it remained a private, self-financing institution operating without government support. Peale's business model has since been adopted by most North American museums, which operate as non-profit organizations generating independent revenue to finance their programming (Schwarzer 2020). Often created by collectors and local historical societies, museums remain responsive to the needs of citizens. They are administered by boards of directors who maintain close ties with collectors and patrons. Only a few national museums are funded by the Canadian and American governments. In short, the majority of North American museums are managed as businesses that must generate sufficient revenue to ensure their cultural and social missions (Selbach 2024).

In order to promote the development of the museum network, governments have adopted legislation that encourages patronage by offering tax incentives to individuals and companies who financially support museums. This economic model for museums, also adopted by national museums, has historically favored the development of practices that favour the quality of the museum experience for visitors, who are approached as customers. In this context, it is perhaps unsurprising that associative links are central to North American museum culture. For example, the American Association of Museums (AAM) brings together nearly 3,000 institutions. In Canada, several national associations represent the museum sector, including the Canadian Museums Association.

Due to difficulties in establishing contact with museums in the United States, Canada is overrepresented. This is also due to the fact that the expert author of the regional report for North America was based in Canada and had far more ready access to information on Canadian institutions. Overall the North American sample includes 13 museums :²⁷

²⁷ Data for the regional report for North American Regional report was collected by Marc Lajoie, assisted by Lisette Carine Pedraza-Cala. For a full breakdown of the museums, see Annex III.



Figure 2.5.1. - List and Location of Responding Museums (North America)

- | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ol style="list-style-type: none"> 1. Aga Khan Museum (Canada) 2. Art Gallery of Ontario (Canada) 3. Baile nan Gàidheal Highland Village (Canada) 4. Bata Shoe Museum (Canada) 5. Canadian Museum for Human Rights (Canada) 6. Espace pour la vie (Canada) 7. Monastère des Augustines (Canada) | <ol style="list-style-type: none"> 8. Musée d'art de Joliette (Canada) 9. Musée des cultures du monde (Canada) 10. Musée McCord Stewart (Canada) 11. Musée national des beaux-arts du Québec (Canada) 12. Museum of Anthropology at the University of British Columbia (Canada) 13. Cleveland Museum of Art (United States of America) |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

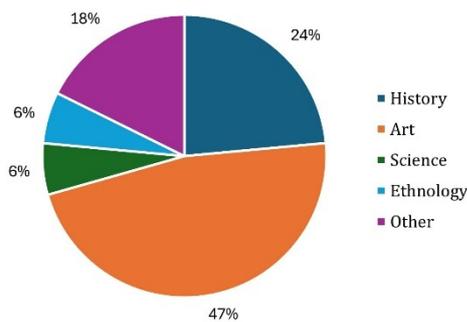


Figure 2.5.2. - Types in Responding Museums (North America)

Museums were asked to choose one or two types to describe themselves. The 13 museums in the sample made a total of 31 choices of type. The % reflects that number (31).

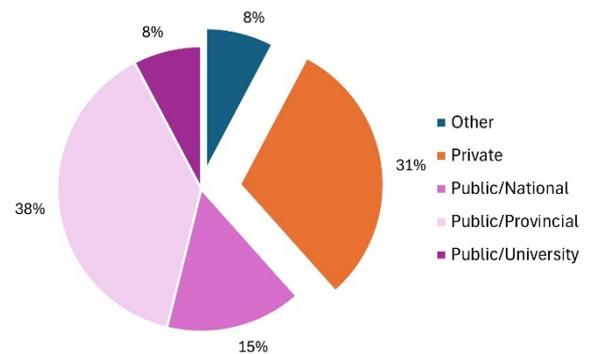


Figure 2.5.3. - Legal Status of Responding Museums (North America)

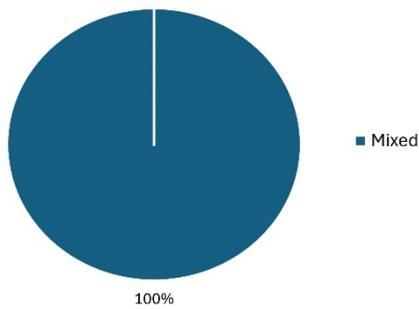


Figure 2.5.4. - Funding Sources of Responding Museums (North America)

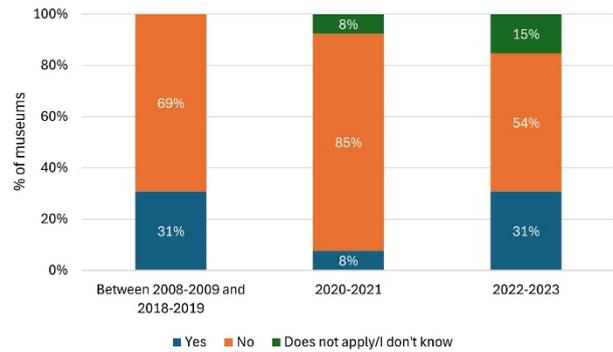


Figure 2.5.5. – Breakdown of Public Funding Decrease in Responding Museums (North America)
To the question : Did public funding decrease?

2.5.2 Funding Fluctuations

In North America, the level of public funding for museums has experienced considerable fluctuations, leading to significant operational challenges. For instance, the Cleveland Museum of Art faced a 35% reduction in county funds between 2008 and 2018, forcing it to seek alternative funding sources. However, they stated that by 2019 autonomous revenues had contributed to offset this decrease. However, very few museums reported real decreases over the last decade. Public funding increased in 2020-2021, but returned to pre-pandemic levels through 2022-2023 (Figure 2.5.5.).

In Canada, the funding landscape for museums is complex. The Musée national des beaux-arts du Québec and the Canadian Museum for Human Rights illustrate the existing diversity of funding sources, both institutions blending government subsidies with autonomous revenues such as donations and ticket sales. For instance, the Canadian Museum for Human Rights, one of Canada's nine National Museums, raises significant funds through its foundation, notably with an annual gala. This example showcases the importance of foundation in organizing fundraising. Federal support has remained relatively stable, but several museums, like the Museum of Anthropology and the Art Gallery of Ontario have stated that funding has not kept pace with inflation. Meanwhile, provincial and municipal funding has fluctuated significantly, creating financial instability. For example, the Baile nan Gàidheal Highland Village has had its first increase in provincial support for its operational funding since 2008.

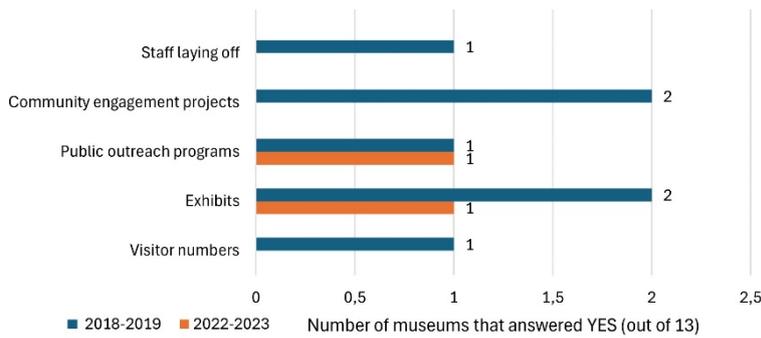


Figure 2.5.6. - Aspects Impacted by the Decrease in Funding (North America)

Moreover, national museums in Canada must cope with new operational demands, such as cybersecurity requirements and compensation for board members, without additional funds. This situation forces museums to address financial pressures within their existing budgets, without adjustments for

salary indexation, inflation or other operational cost increases. These added financial pressures have led to various operational challenges for museums, including staff reductions, fewer exhibitions (before and after the pandemic), and reduced community engagement projects (Figure 2.5.6.). This has compelled museums to boost self-generated income through ticket sales, memberships, merchandising and event hosting (Figure 2.5.7.). For instance, the Art Gallery of Ontario has significantly enhanced its revenue through dynamic membership programs, retail operations, and space rentals; already before the pandemic, the institution had had to increase its fundraising efforts. Similarly, the Baile nan Gàidheal Highland Village increased its independent revenues between 2008 and 2019, largely offsetting the drop in government funding.

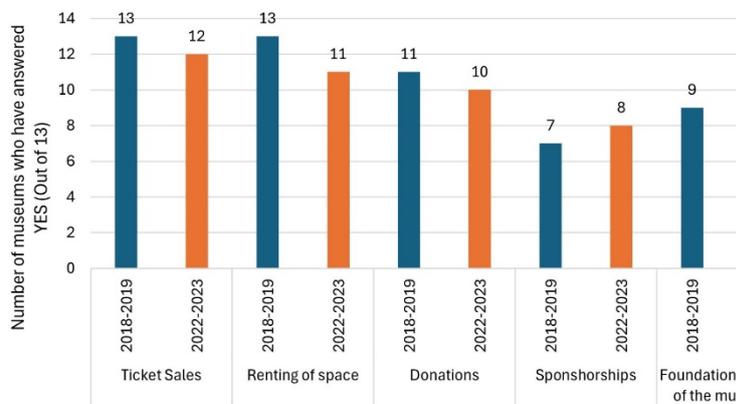


Figure 2.5.7. – Autonomous Revenues Generated by the Responding Museums (North America)

During the pandemic we were lucky in Canada that the government provided additional funding to arts organizations. Interestingly, the most money we received was not through traditional arts funders, but through tourism funding. [...] Almost 10 times what we received from the arts funders

In Canada, the federal government enacted a series of financial measures during the pandemic that benefitted many museums. Two main such measures in particular allowed Canadian museums to weather the pandemic: an emergency benefit for temporarily laid-off workers (Canada Emergency Response Benefit [CERB]) and an emergency wage subsidy for employers (Canada emergency wage subsidy [CEWS]). The latter, especially, helped employers pay their employees, even when revenues dropped. The McCord Stewart Museum, a private institution, and the Baile nan Gàidheal Highland Village, a public institution, both benefited from these measures. However, these programs and funding left a gap that has been difficult to address. As mentioned by the

Canadian Museum for Human Rights, although the survey did not cover the current fiscal year, the federal government's 2023 budget directed federal crown corporations, including museums, to reduce their operating budgets by roughly three percent.

It should also be noted that funding can come from a variety of sources, and not only the ministry responsible for culture. The Museum of Anthropology noted that, during COVID, the provincial ministry for tourism was the highest funder, underlining the importance of museums as tourist attractions. In addition, the Museum of Anthropology is a branch of the University of British Columbia, which provides 35% of the museum's operating budget.

2.5.3 Adapting To Funding Challenges

Museums across North America are increasingly diversifying their revenue streams to ensure financial stability. This strategy includes seeking private donations, corporate sponsorships, ticket sales, and commercial activities (Figure 2.5.7.). The Bata Shoe Museum in Toronto illustrates how museums are leveraging their unique attributes to generate income: the museum leverages ticket sales, space rentals, and a strong e-commerce presence in addition to donations, with 20% of its budget coming from ticketing and another 17% from donations. Other examples include the Musée national des beaux-arts du Québec and the Cleveland Art Museum, which host paid educational activities and hold investment portfolios to generate income.

A unique example is the Monastère des Augustines, which generates independent income through a hotel attached to the museum. All the income is reinvested in the museum and its archives center, all operating within the same non-profit organisation. This is an innovative business model with links to the social economy ecosystem, and demonstrates that nonprofits are not overwhelmingly subsidized organizations: 80% of its budget comes from own-source revenues, and only 15% from public funds, mostly for specific projects. The Monastère des Augustines has carved out a place for itself in the niche of wellness tourism by offering visitors a relaxing experience. In addition, it offers special rates for caregivers. By reflecting about the monastery's place in society and what they could offer as a museum, the institution has succeeded in creating a highly innovative model (Bérubé 2023).

Some museums use crowdfunding to finance specific projects, like the Aga Khan Museum, helping to increase community engagement. The McCord Stewart Museum notes that all mediation programs and community projects are specifically funded and are therefore less impacted by the decrease in funding.

This structure demonstrates the importance of community outreach for museums which develop efforts to foster partnerships with local businesses, schools, and cultural organizations, in order to build a robust support network. Both Espace pour la vie and the Canadian Museum for Human Rights highlighted the importance of engaging communities through

Attention to others, which was already very great for our institution, has become essential and primordial, making humans, their needs and their vulnerability even more precious.

various projects, with the latter even organizing field trips throughout Canada to meet with the public.

Massive increase in digital offerings, scaled and newly implemented during the pandemic

Digital initiatives have also become a critical focus, with museums developing online platforms to disseminate educational content, showcase their collections and engage with global audiences. During the pandemic, both the federal and provincial levels of government developed ad hoc funding programs for new digital initiatives, both to

develop cultural content and to optimize management processes and systems. While this funding is no longer available, its impact has been lasting, with many surveyed museums now developing their online presence. The Aga Khan Museum has even created a new strategic plan that firmly entrenches digital offerings in its program. The Musée d'art de Joliette initiated an innovative project, Quarantined Museum (*Musée en quarantaine*), an online space for remote audience engagement and virtual exhibitions, receiving very positive responses from communities within Quebec, Canada, and beyond, in addition to garnering significant media attention.

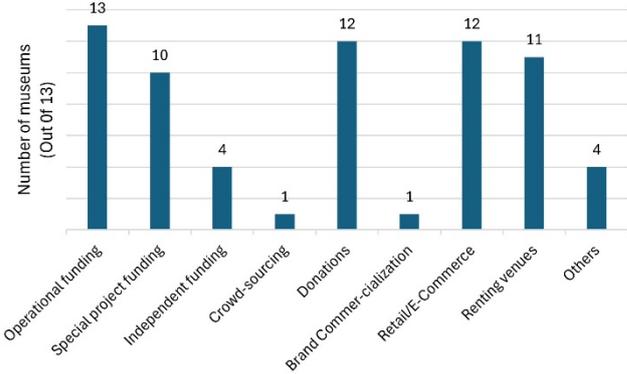


Figure 2.5.8. – Alternative Sources of Funding (North America)

Although they have not faced significant decreases in funding overall, museums in North America have developed a varied range of innovative approaches to generate autonomous revenues. Even when it is not essential to cover operating budgets, autonomous revenue (Figure 2.5.8.) gives museums more freedom to implement programs that help to foster community engagement.

2.5.4 Key Findings

INNOVATIVE APPROACHES

- Private and corporate donations.
- Leveraging ticket sales and commercial activities: Ticketing, space rentals, e-commerce and paid educational activities.
- Alternative business models: Attached hotel, wellbeing tourism, special rate offers and investment portfolios.
- Crowdfunding and community projects through specific grants.
- Partnerships with local entities (local businesses, schools and cultural organizations).
- Digital and online initiatives: Developing digital tools, online exhibitions and virtual tours. Massive increase in offerings during the pandemic.
- Creating autonomous revenue.
- Resilience: Optimization, proactivity in finding alternative funding, and self-reliance.

Museums in North America face significant fluctuations in public funding. To navigate this challenging landscape, museums are emphasizing the diversification of their revenue sources through private donations, corporate sponsorships, ticket sales, and commercial activities. Additionally, they are increasing their investments in digital platforms to expand audience outreach, enhance engagement and grow revenue potential. Building strong community connections and securing corporate sponsorships is also crucial for financial sustainability amidst funding fluctuations.

2.6 Oceania

2.6.1 Overview

Museums and galleries in Oceania were first established in the 19th and early 20th centuries in accordance with British and European models. They developed in more distinctive ways in the late 20th century due to various factors such as isolation, social decolonisation movements and nationalism, economic independence, technological innovation, and engagement with indigenous populations. Museums in Oceania, particularly in Australia and New Zealand, face significant challenges due to declining public funding. After economic rationalization from the 1980s onward, there have been drastic cuts in the public funding of culture in general. These shifts were apparent throughout the British Commonwealth, but were perhaps most radical in New Zealand's restructuring of the public sector, encapsulated in the “user pays” mantra.

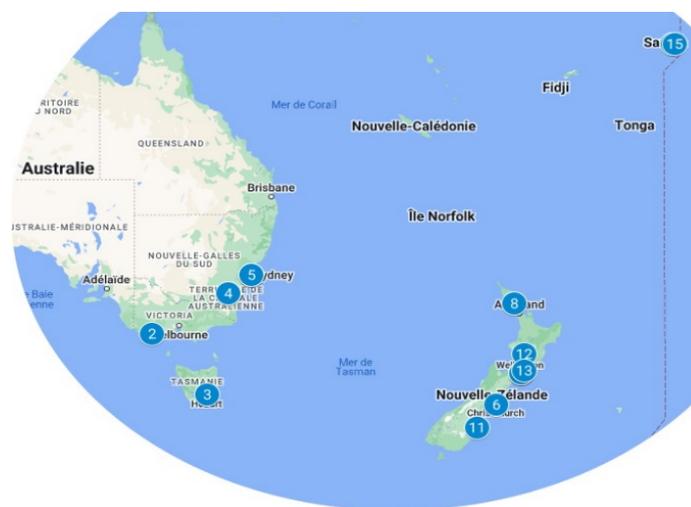


Figure 2.6.1. - List and location of responding museums (Oceania)

- | | | | |
|----|----------------------------------------------------------------|-----|-------------------------------------------------------|
| 1. | Australian Museum (Australia) | 9. | Museum of New Zealand Te Papa Tongarewa (New-Zealand) |
| 2. | Flagstaff Hill Maritime Museum and Village (Australia) | 10. | New Zealand Cricket Museum (New-Zealand) |
| 3. | Museum of Old and New Art (Australia) | 11. | Waitaki Museum and Archive Oamaru (New-Zealand) |
| 4. | National Museum of Australia (Australia) | 12. | Whanganui Regional Museum (New-Zealand) |
| 5. | Powerhouse Museum (Australia) | 13. | Whirinaki Whare Taonga (New Zealand) |
| 6. | Christchurch Art Gallery Te Puna o Waiwhetū (New-Zealand) | 14. | EFKS Fine Arts Museum (Samoa) |
| 7. | Experience Wellington Wellington Museums Trust (New-Zealand) | 15. | Falemata'aga/Museum of Samoa (Samoa) |
| 8. | Kauri Museum (New-Zealand) | | |

There are a very high number of museums per capita (over 500 in New Zealand for a population of only 5 million), but the majority are very small community facilities with few or no professional staff. There are a wide variety of governance and management structures ranging from Crown (government) entities to charitable trusts, incorporated societies, and private companies, among others. Māori communities, through marae and whānau, also operate their own museums and cultural centres. In New Zealand, there is only one government-funded national museum (Te Papa), a handful of metropolitan galleries and museums, as well as a large number of small and micro museums.²⁸

Overall, public funding has unquestionably declined. Funding designated to “arts, culture and heritage” has fallen from 81% in 2007 to 71% in 2021 (Sohanpal 2023). Island nations face formidable challenges of maintaining collections in tropical climates and with the impacts of accelerating climate change.

The survey sample for Oceania includes 15 museums, with a good balance between Australia and New Zealand. The presence of two museums from Samoa is a welcome addition, giving the Pacific Islands a level of representation within the study :²⁹

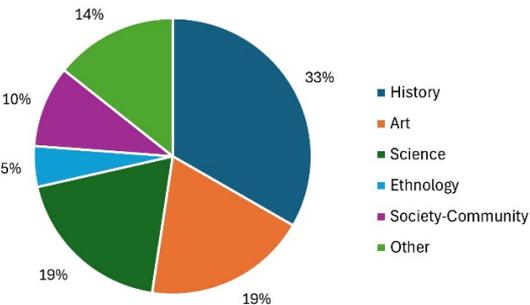


Figure 2.6.2. - Types in Responding Museums (Oceania)

Museums were asked to choose one or two types to describe themselves. 21 types were chosen in Oceania. The 15 museums in the sample made a total of 21 choices of type. The % reflects that number (21).

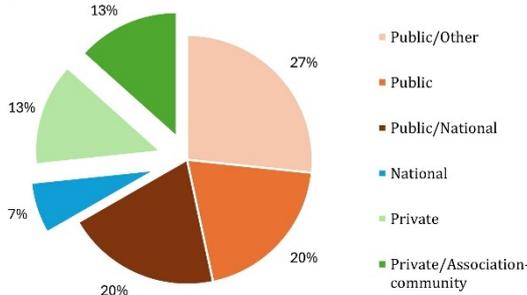


Figure 2.6.3. - Legal Status of Responding Museums (Oceania)

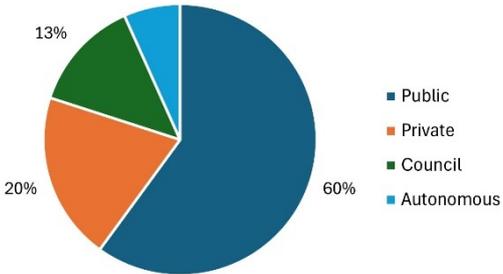


Figure 2.6.4. - Funding Sources of Responding Museums (Oceania)

²⁸As per the regional report for Oceania, by Conal McCarthy.

²⁹Data for the Oceania regional report was collected by Conal McCarthy, assisted by Anna Abernethy. For a breakdown of the museums, see Annex III.

2.6.2 Funding Fluctuations

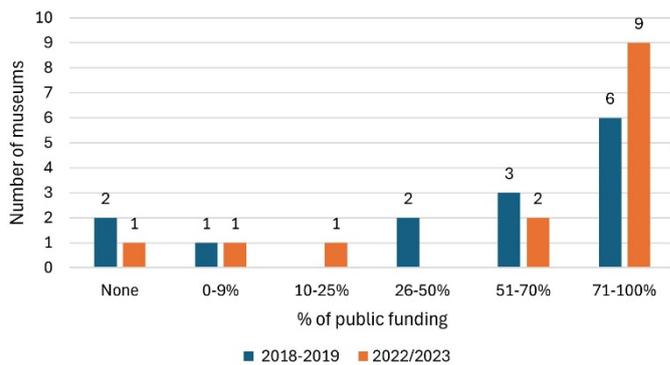


Figure 2.6.5. – Percentage of Public Funding in Responding Museums (Oceania)

In Australia, public funding increases have been minimal over the past decade, less than 10%, and funding has decreased in some cases. The decline has been more pronounced in federal and state government contributions, affecting various aspects of museum operations, although private museums noted that the decrease in funding affects them just the same. Federal funding provides a portion of the budget

for museums, with nine national institutions receiving 71-100% of their direct funding from the federal government (Figure 2.6.5.). However, this federal support accounts for less than 10% of the total museum funding. State governments also contribute through grants supporting local priorities, but the decentralized nature of this funding model creates challenges for financial stability and planning, as there is no reliable central data on public funding from state or local governments.

In New Zealand, the impact of public funding cuts has been severe. While funding reductions have been less severe compared to Australia, the impact on smaller regional museums has been significant. There were regional museums fund grants under the previous government, but they have been discontinued. Only Te Papa, the national museum, still receives direct central government funding and has managed to maintain relatively stable government support, yet still faces pressures to diversify its funding sources. Other museums primarily rely on local government and private sources. Most museums are managed by city and regional councils, but public funding has significantly declined in recent years. Museums can apply for lottery funds administered by the Department of Internal Affairs, but these funds are highly competitive, unstable, and often insufficient to ensure stable operations. Responding museums noted that autonomous revenues, more than government grants, are used to offset the decrease in public funding. It should be noted that, as mentioned by the Falemata’aga/Museum of Samoa, even when there was no decrease, the museum still had problems meeting its annual budget.

Our organisation has been underfunded for years. We don’t have enough funds to deliver what we are charged to deliver on behalf of council

The funding cuts have led to operational challenges across Oceania, including staff reductions, limited public programming, and deferred maintenance of collections (Figure 2.6.6.). Cuts have mostly affected collections, exhibitions, public programs, and outreach initiatives.

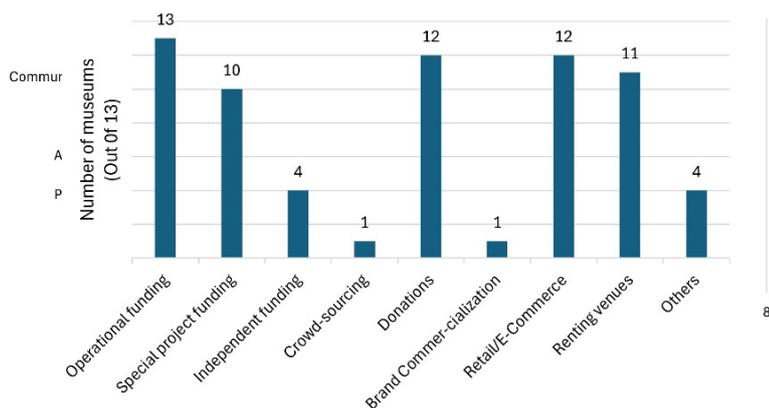


Figure 2.6.7. – Alternative Sources of Funding (Oceania)

Decreased funding especially impacts public outreach programs, which play a crucial role in engaging diverse audiences, fostering community connections and promoting cultural understanding. Less funding may hinder the museum's ability to fulfill its educational and community-oriented mission, as stated by the EFKS Fine Arts Museum. Finally, natural disasters and climate change further strain

financial resources, requiring investments in earthquake strengthening and insurance, which are often not funded by the government.

During the COVID-19 pandemic, temporary increases in funding were observed, but these were not sustained, leading to ongoing financial crises post-pandemic. Many museums have faced staff cuts, impacting their ability to maintain services and pursue funding opportunities, but a majority of the responding museums stressed the importance of retaining their staff during the crisis. Currently, public funding in Oceania prioritizes exhibitions, collections storage, and building maintenance, among other elements, since in many cases the COVID-19 crisis exposed shortcomings in these areas.

Collecting was impacted by inadequate storage conditions and availability of storage as a result of lack of funding. Permanent gallery redevelopments were delayed.

2.6.3 Adapting To Funding Fluctuations

This decline in public funding has forced museums to explore alternative revenue sources, such as retail, sponsorship, and venue hire, but these measures have not fully compensated for the loss in government support, leading to ongoing financial challenges. As such, museums in Oceania are increasingly relying on a mix of revenue sources, including commercial activities, private donations, sponsorships, and membership programs in order to offset the decrease in public funding (Figure 2.6.7.). Museums often must raise up to 50% of their income through autonomous revenue.

Many museums actively seek partnerships with private and corporate entities to support exhibitions and special projects. Both the National Museum of Australia and Falemata’aga/Museum of Samoa stated that they rely on partnerships, the latter specifying partnerships with museums worldwide. Reliance on philanthropy and corporate sponsorship has increased, although this model has its challenges due to the local context’s lack of a strong tradition of philanthropy. However, the EFKS noted that donations at the door exceeded expectations when put in place.

During the COVID-19 crisis, digital tools and web-based development were encouraged and implemented by many responding museums. For example, The Powerhouse Museum in Sydney has had to scale back some of its programs and exhibitions due to reduced funding, while simultaneously increasing its digital content offerings. Similarly, the Whanganui Regional Museum has implemented and maintains a digital offering through its YouTube account. Finally, institutions such as Te Papa in New Zealand have successfully utilized digital education programs as revenue streams. They offer virtual explorer live-feed programs, enhancing both educational outreach and financial sustainability. Emerging trends in Oceania include Non-Fungible Tokens (NFTs)³⁰ and virtual gallery tours, which open new revenue streams, although these strategies require significant initial investments and technological infrastructure. Digital initiatives have become a priority, with museums developing robust online platforms to showcase their collections and engage with a global audience. However, limited funding is available to support e-commerce and digital projects.

Other examples of innovative approaches to creating autonomous revenue include dynamic pricing models, like Whirinaki Whare Taonga's pay-by-donation model for exhibitions, which has proven successful in surpassing visitor number projections and increasing funds. Te Papa has also considered entrance fees for international travellers. Strengthening ties with local communities through outreach programs and partnerships with local organizations helps museums garner support and increase visitation. The National Museum of Australia engages with indigenous communities and local schools to create inclusive educational programs.

Despite innovative work in this space, the private Kauri Museum has had to sell assets (house and land) to pay for an operational funding shortfall, but warned that this solution was a one-off measure, offering only a temporary boost. Another notable use of commercial development is the Museum of Old and New Art's winery and the Australian

INNOVATIVE APPROACHES

- Local and international partnerships and increased reliance on philanthropy.
- Dynamic pricing models: Pay-by-donation and pay-as-you-go.
- Community engagement: Inclusive and educational programs and partnering with local organizations.
- Digital and online initiatives: Developing digital platforms, online exhibitions virtual tours, e-commerce and digital educational programs.
- Commercial development: Unique commercial ventures, research institutes, winery.
- Asset liquidation: Cover funding shortfalls.

National Museum research institute.

³⁰ For more information on NFTs in museums, see: Valeonti et al. 2021.

2.6.4 Key Findings

Museums in Oceania, particularly in Australia and New Zealand, have experienced significant challenges with regards to public funding. The trend shows a decline in government support, pushing museums to explore diversified revenue sources and innovative funding models to maintain their operations and public engagement and continue to fulfill their role.

Museums have responded by diversifying their income through commercial activities, digital engagement, private sponsorships and community partnerships. The shift towards digital platforms has been significant, allowing museums to reach a broader audience and maintain engagement despite physical constraints. Building strong community connections and securing corporate sponsorships are essential strategies for sustainability in the face of declining public funds. In fact, despite changes in the last few years, responding museums did not report transformations in the financing models of the institutions.

Continuous advocacy for increased government support remains a critical strategy, with museums lobbying for more stable and long-term funding commitments. The Museums and Galleries Association of Australia (MGAA) advocates for better funding and policies to support the sector.

2.7. Conclusion

The financial landscape of museums varies significantly across regions, reflecting local economic conditions, cultural priorities, and governmental policies. In Japan, museums face reductions in public funding, while China maintains stable support enabling digital expansion. African museums encounter severe financial challenges, relying on self-generated revenues and private donations. In North America, museums adapt to the variability of public funds through the diversification of income sources. Institutions in Australia and New Zealand focus on expanding commercial activities and digital initiatives to offset budget cuts. Museums in Latin America and the Caribbean face economic instability and shifting political priorities.

While Chapter I offers a global quantitative perspective on museum funding, highlighting trends such as the decline in public subsidies and the adoption of hybrid models, Chapter II takes a more qualitative approach by focusing on the specific responses of museums across different regions of the world.

Chapter I identifies the key factors driving funding decreases, such as economic crises, shifts in governmental priorities, and increased competition for limited public resources. It establishes that large, well-established institutions with diversified funding models tend to be more resilient to financial challenges than smaller, regional museums. In contrast, Chapter II illustrates how these general trends manifest concretely, showcasing examples of innovative strategies like digital transformation, community engagement, and the diversification of revenue sources. This qualitative analysis

complements and nuances the quantitative data by demonstrating how museums are locally adapting to economic and cultural realities. Thus, the two chapters are complementary: the first provides an overarching view of global financial challenges, while the second illuminates the practical responses and strategies museums implement to address them.

The combined analyses of Chapters I and II underscore the need for museums to adopt sustainable economic models and innovative strategies to overcome financial challenges. Digital transformation, the development of strategic partnerships, and community engagement are key levers to strengthen the financial resilience of museums and help them fulfill their cultural and educational missions (Frey & Meier 2006; Finnis et al. 2011; Woodward 2012). Persistent advocacy for increased government support remains crucial. Cultural institutions must collectively emphasize the value of museums to secure necessary funding, while exploring new revenue sources and strengthening digital engagement will be essential to ensure long-term sustainability (Alexander 2018).

However, while some data indicate that funding has not decreased in certain areas, operational costs have increased while budgets, in many cases, remain unchanged. Beyond inflation, costs related to areas such as insurance, compliance with cybersecurity standards, and sustainability have become critical issues. Museums must therefore adapt to new financial parameters while continuing to fulfill their missions. This financial fragility underscores the importance of robust and innovative funding strategies, including diversifying revenue sources through private donations, corporate sponsorships, ticket sales, and commercial activities.

Museums that integrate diversified funding models, embrace digital transformation, and strengthen community engagement are better positioned to navigate these challenges and thrive. By understanding and adapting to global trends, museums can ensure their continued relevance and impact in the preservation of cultural heritage and educational contribution to society.

CHAPTER III - LOOKING AHEAD : MUSEUMS' CHALLENGES

As guardians of cultural heritage, museums have been undergoing a period of intense transformation over the past few decades. As demonstrated in the preceding chapters, various factors influence these changes, ranging from financial, environmental and social sustainability to increased ethical and social responsibilities. Museums play a crucial role in preserving and showcasing the cultural and historical narratives of societies. However, the dynamic landscape of the 21st century demands that these institutions adapt to evolving societal expectations, technological advancements and global challenges.

In fact, while the ideal goal of museum management is to continuously expand the scope of activities, in reality, difficult choices must be made in allocating limited resources to achieve certain objectives effectively, at the expense of others (Feldstein 1991). This crucial need to arbitrate between different goals stems from the scarcity, and therefore the relative cost, of available resources. This scarcity leads to the necessity of forgoing some potentially conflicting objectives in favor of others. Furthermore, competition has intensified with the expansion of heritage to tangible, intangible, and natural elements, along with a rise in museums founded by patrons and corporations. These new museums compete directly with the public museum network. Based on the analysis of data provided by 59 ICOM National Committees, as well as the 119 selected museums around the world, this chapter explores the main challenges and resulting impacts facing museums today.

3.1 Financial Sustainability

Museums are facing broad challenges in ensuring their financial sustainability in an uncertain funding landscape. While each region, country, administrative area, and city are subject to various trials, and museums therein are subject to significant disparities, there are common themes that emerge from their struggles.

Traditional funding sources, such as public grants and private donations, are becoming increasingly unpredictable due to global economic fluctuations and shifting government budget priorities (CMA 2022). Furthermore, geopolitical instability exacerbates these difficulties. International tensions, economic sanctions, and diplomatic crises can directly impact museum funding, especially for those located in politically sensitive regions or reliant on foreign donors. The energy crisis, particularly in Europe, is a recent example of financial pressure on museums. This can have an impact on day-to-day operations, and some museums are forced to reduce their opening hours or modify

climate control in their storage facilities, although this is representative only of a minority (Ramskjær 2020; Rasmussen 2022b; Ardelius 2022).

3.1.1 Alternative sources of funding

Funding will continue to be reduced because the museum is expected to generate its own revenue for both operations and projects in the next decade or so. (Museum)

In response to declining public and private funding, museums must innovate and diversify their revenue streams. This includes enhancing financial stability and engagement by expanding and diversifying their membership programs, diversifying revenue streams by utilizing crowdfunding (Prokúpek and Ballarini 2022), monetizing digitized collections through NFTs and Art Security Tokens (Valeonti et al. 2021; Prokúpek and Ballarini 2022), leveraging museum spaces and brand, employing dynamic pricing (Merritt 2020), as well as developing corporate partnerships and philanthropy through collaborations, sponsorships, grants, and planned giving programs. Some museums capitalize on intellectual property by creating innovative products and partnerships, enhancing visitor engagement. Licensing and product development with tech companies and commercial partners for educational content and merchandise expand reach and secure income, while producing educational content and media productions in partnership with media companies helps monetize knowledge and fulfill educational missions.

In addition, digital initiatives offer new revenue streams but also present a budgetary challenge. Museums can leverage technology to create virtual tours, online exhibitions and educational content, attracting a global audience and generating income through digital ticket sales and online donations. Notable examples include the British Museum's "Museum of the World" interactive online experience and the Smithsonian Institution's variety of virtual tours and educational resources.

However, implementing these digital projects requires significant investment in technology and expertise, making it a feasible option primarily for museums with substantial financial resources. For smaller institutions, balancing the cost of digital innovation with their limited budgets remains a significant hurdle. Despite being well-documented and publicized in the media, these alternative funding forms are not uniformly developed worldwide or across all museums.³¹ Disparities exist between small and large museums, as they do not have the same means to accomplish their missions, ensure financial stability and boost engagement.

One notable exception to this trend is China, as shown in the Chinese regional report, above, where the government provides generous funding to museums. This financial

³¹ See Chapter II - Qualitative Analysis, for a detailed discussion.

support allows Chinese museums to plan and undertake expansive projects with greater confidence. However, reliance on government funding introduces another set of challenges : a recessive conservatism prevails. There is a reluctance to be creative in the fast-changing social context. In summary, museums should not be overly reliant on the public funding they receive and should be prepared in case government disengagement were to occur.

3.1.2. Short-Term Budgeting

A lot of things the museum was preparing to prioritise but funding is always the problem (Museum)

Museums often find themselves operating within the constraints of short-term budgets, which impedes their ability to plan and execute ambitious, long-term projects. This situation is compounded by the uncertainty surrounding public funding, which varies greatly depending on political climates and economic conditions. Without assured public funding guarantees, museums struggle to commit to long-term initiatives that would have the potential to significantly enhance their collections, exhibitions and educational programs. In short, there is a certain imbalance between short-term investments, emergency funds, boosts for specific initiatives and sustainable funding with strategic planning. This includes optimizing existing resources to meet increased responsibilities. Museums are encouraged to streamline operations, implement cost-effective technologies, and improve energy efficiency to reduce operational costs. Ideally, these savings would then be redirected towards core missions such as addressing social issues, enhancing community engagement and expanding educational programs. In reality, however, cost-saving measures are often only enough to cover the basics, leaving little room for additional initiatives.

In China, there is a very short deadline between fiscal years, which encourages museums to budget only for the short term. Another problem facing Chinese museums is the narrower scope of themes and subjects that they can address, potentially limiting the diversity and inclusivity of exhibitions and programming. Although specific, this situation highlights the delicate balance between financial security and creative freedom that museums worldwide must navigate.

3.1.3. Project-Specific Funding

All areas across the Museum that did not have significant attendance and / or performance were reduced in down cycles to balance the budget. (Museum)

Many donors prefer to allocate their contributions to specific projects rather than to the general operating budget of museums, such as to improve their digital presence (Simmons 2021; City of Pickering 2024) or to protect their collection (Art Africa 2021), for example. While these project-specific funds are crucial for launching new exhibitions, educational programs, and conservation efforts, they present a challenge for long-term

financial planning. Museums can find it difficult to manage their overall financial health when much of their funding is tied to specific, often short-term projects rather than ongoing operational needs. However, museums can access tools with which to navigate their funding search (Musée et Société en Wallonie 2022). Based on the survey results, we can also assume that the rise in the number of private museums over the last two decades could make it more difficult for public museums to find private funding, further increasing competition between institutions.

To better anticipate and manage future financial needs, it is crucial to clearly distinguish between recurring operating budgets and project-specific budgets. Operating budgets cover essential, ongoing expenses, such as staff salaries, utilities, and maintenance, while project-specific funds are allocated for defined initiatives. Making this distinction helps museums to develop more accurate financial forecasts and ensures that they do not overextend themselves on new projects at the expense of their core operations.

3.1.4 Professionals and Volunteers

The funding decrease, along with the bureaucratic system that the museums in our country are tied to, has created a lot of uncertainty amongst their workers. (National Committee)

Volunteers play a crucial role in daily operations, from guiding tours and managing visitor services to assisting with collections management and educational programs. This is neither new nor unique. In the 19th century, museums in the English-speaking world were born out of volunteerism and the associative sphere. However, the same paradigm does not fully apply in countries with a Latin tradition, where the model of volunteers as partners works well in the case of community museums inspired by the new museology movement, but creates a dependence which raises questions about the financial viability of museums.

There are also human costs, felt by both paid staff and by volunteers. While many volunteers are passionate and dedicated, they are not immune to the stresses and demands of their roles. Without proper training and support, volunteers may find their work challenging, which can affect their effectiveness and satisfaction. Additionally, overreliance on volunteers can perpetuate inequities, as only those who can afford to work without pay can contribute, potentially limiting the diversity of perspectives and experiences within the museum workforce. Finally, managing volunteers can be very stressful for museum staff, as they are often full of goodwill, but may not be familiar with the demands of museums or the public. This raises the issue of coexistence between trained professionals and well-intentioned individuals who may not fully grasp the ethical standards of professional practice.

Furthermore, certain categories of museums operate primarily through the dedication of volunteers, creating a unique challenge when seeking additional funding. Justifying the need for financial support can be difficult when an institution appears to operate

effectively without a paid staff. So, while they provide essential support, volunteers' involvement often highlights underlying financial struggles facing museums. Reliance on unpaid labor to maintain services can mask the true cost of operating these cultural hubs. This reliance can lead to instability, as the availability of volunteers may fluctuate, and often means that museums cannot offer consistent, professional-level services without adequate funding. As well, it can be difficult to retain professional staff when more attractive salaries are available in the private sector. There is sometimes talk of a "museum exodus," which accelerated after the pandemic, primarily in the United States (Halperin 2023).

3.1.5 Advocacy

The museums have been doing a lot of lobby to try to have more equal amounts and more justice between different museums. (National Committee)

Advocacy is essential for museums in order to enhance their resilience and long-term sustainability. By lobbying for public funding, highlighting their cultural, educational, and economic benefits with compelling data and success stories, museums can ensure continued growth. Building partnerships with educational institutions, corporate entities, and community organizations can attract new funding, broaden networks, and address local needs (Gilis 2022). Inclusive, participatory community engagement programs and public awareness campaigns that emphasize museums' role in preserving cultural heritage and addressing contemporary issues can further strengthen public support and engagement.

3.2 More with less

3.2.1 Increased Responsibilities

We don't have enough funds to deliver what we are charged to deliver (Museum)

Even when their budget appears stable, museums often face new financial obligations such as data security, digital transformation, updated environmental standards and, in some cases, compensating board members, while also needing to adapt to new imperatives, such as decolonization. All of these additional responsibilities must be met without any increase in funding, further straining museums' financial resources.³²

This places significant pressure on museum professionals. With limited budgets, museum management and staff are frequently required to make difficult choices in

³² As made clear in answers to the quantitative survey; see sections 1.2 and 1.4, above.

allocating resources (Johansson 2020; Puffett 2024).³³ They must prioritize essential functions, often at the expense of staff salaries, professional development and long-term planning. This can lead to burnout among museum professionals, as they are expected to do more with less, which can impact the quality of visitor experiences and educational programs.

The ongoing decolonization movement is also set to profoundly reshape museums by challenging their traditional narratives and practices. Museums are increasingly working to reframe their narratives to include multiple perspectives, particularly those of historically marginalized groups. This involves not only changing exhibits but also rethinking programming, educational efforts, and community engagement. As calls for more representation gain momentum, museums face increased scrutiny for their roles in perpetuating colonial histories and practices (Smart 2020; *Premium Official News* 2021). However, pursuing this inclusive approach comes with significant financial challenges and additional time demands.

On the African continent, museums such as the Phuthadikobo Museum in Botswana and the National Museum of Tanzania, discussed in the regional report for Africa, strive to ensure they are relevant to their communities by fostering cross-cultural understanding and promoting both tangible and intangible heritage. These institutions aim to include diverse perspectives and engage their communities more effectively. Governments are also increasingly investing in restitution projects (Egypt Today 2022; CICG 2023; *El Watan* 2024). However, they face significant challenges, such as reduced government funding, low visitor numbers, and stagnant programming, making it difficult for African museums to sustain their operations and expand their outreach initiatives.

Decolonization is an inevitable and transformative force for museums in the coming decades, with both diplomatic and economic consequences. The movement affects international and national relations, particularly when it involves returning collections to indigenous communities. This re-evaluation is essential not only for correcting past wrongs but also for ensuring that museums remain relevant and respected institutions in a more equitable and just society. This process is complex and requires careful negotiation and collaboration to ensure that it is conducted respectfully and effectively. By embracing decolonization, museums can redefine their roles, fostering a deeper understanding and appreciation of diverse cultures and histories.

³³ A survey conducted by the Swedish Museum Association among 91 museum directors revealed that 43 of them were worried about the future and that many testified to tensions between the social potential of museums and the limited resources they must cope with (Sveriges Museer 2021).

3.2.2 Museums as third spaces

There was also the project to strengthen the capacities of museums with a view to combating insecurities. (Museum)

As cultural institutions, museums are increasingly expected to address a wide range of social issues, including promoting diversity and inclusion, supporting community engagement, and providing educational programs that go beyond traditional exhibits. These new and expanded roles require significant resources, staff training, and strategic planning. Many museums, already struggling with financial constraints and operational challenges, may find it difficult to meet these growing expectations effectively. The ability of museums to adapt to these new demands while maintaining their core mission of preserving and presenting cultural heritage remains a critical question for the sector. The model of cultural institutions as mixed-facility sites, with onsite cafes, commercial areas and place for socializing, aligns well with the concept of a museum as a “third space” (Bloom et al. 2013), with growing numbers of institutions becoming third spaces for their communities.

These third spaces are social environments where people gather and interact outside of both home and work. Institutions like the Australian Museum and the National Museum of Australia have embraced this role, offering a variety of community and educational programs. New Zealand museums such as Te Papa have integrated third space into exhibition development. For example, the *Te Whare Rākau* section within the *Te Taiao | Nature* exhibition offers a low-sensory reading nook where visitors can connect with each other and talk over their attitudes and perspectives of nature. In Latin America, the Museu de Imagens do Inconsciente has a library and offers therapeutic workshops.

The idea of the social role of the museum is a transcontinental movement whose epicenters have been marked by certain currents, such as *Nouvelle Muséologie* in Europe and in Quebec (Desvallées 1992; Brulon Soares 2015), Sociomuseology in Latin America (Brulon Soares 2022), and New Museology in the Commonwealth (Vergo 1989; McCarthy 2022). These movements fed off each other both in theory and in practice, and shared certain values that served to inform the new ICOM museum definition of 2022. However, these initiatives often rely on short-term project-specific funding or require reallocating budgets by cutting costs elsewhere, leading to difficult decisions in order to stay aligned with their mission.

We must ask what the long-term impact of adopting this vision and this position has for museums within their communities. Will increasing social and educational responsibility sustain greater engagement from communities? Can this in turn strengthen the viability of museums as public forums? While it is too early to answer such questions, we must think about the funds invested in these initiatives as an investment in the future of museums. What kinds of responsibilities and commitments will museums need to take on in the future?

3.2.3 Environmental Sustainability

Museums are very much aware of the uncertainties they are facing. This awareness has become much stronger due to COVID, but (...) other issues are also bothering us: climate issues (National Committee)

A key issue facing museums today is whether their ecological initiatives are sufficient to meet the demands of sustainability. As institutions dedicated to preserving cultural heritage, museums are under increasing pressure to adopt sustainable practices. This includes efforts to reduce their carbon footprint, implement energy-efficient systems, and promote environmentally friendly exhibitions and programs. However, the adequacy of these efforts in addressing broader sustainability requirements remains a significant concern (Janes 2024).

Many museums are still in the early stages of integrating comprehensive ecological strategies. This nascent phase of development raises questions about their ability to fully meet necessary sustainability standards, particularly without a dedicated budget for such initiatives (Rasmussen 2022a; Lemon 2024; Lovely 2024). Environmental sustainability has become a priority for many museums, prompting various eco-friendly practices, and adding to their already growing responsibilities. For instance, the Canadian Museum of Nature has adopted energy-efficient lighting and waste reduction programs, which not only lessen the museum's environmental footprint but also appeal to environmentally conscious visitors and donors (Canadian Museum of Nature 2024).

Furthermore, ICOM's Action Plan for 2030 mandates that museums incorporate comprehensive sustainability practices encompassing environmental, social, and governance (ESG) aspects. The plan emphasizes the need for governance structures based on best practices to support these initiatives but also represents a financial challenge for museums to comply with these requirements. The plan advocates for cost-effective and flexible strategies, respect for human rights and cultural contexts, and recognition of social sustainability dimensions such as community engagement and equity. Integration with international agreements and a gender-conscious and intergenerational approach ensures inclusivity and long-term impact. Phased implementation facilitates gradual adaptation and resource acquisition, while partnerships foster interdisciplinary strategies. Continuous evaluation and adaptation are essential to meet evolving standards, balancing museums' cultural missions with ESG responsibilities.

However, experts emphasize that these policies and guidelines are often more programmatic than substantive, and their real impact remains to be seen. There are ongoing debates about the need to revise exhibition policies to cut costs, the viability of maintaining a large number of museums, and the feasibility of adopting lower-cost collections. These discussions highlight the complexities and challenges museums face in their pursuit of sustainability.

3.3 Ethical Considerations

A significant challenge for museums may lie in combining their financial activities with their ethical values. As museums increasingly rely on external funding, they must ensure that these financial relationships do not compromise their integrity or mission, balancing financial necessity with ethical considerations requires careful thoughts, namely on selection of partners and transparent practices to maintain public trust and uphold the museum's core values. To achieve this, museums should put in place strict guidelines in the form of ethical rules. Codes of Ethics are essential (Prokúpek 2025) to deal with fundraising policy, acceptance policy, donation, and all financial activities involving private and even public partners.

Ethical guidelines should address three key issues : 1. What kind of businesses and industries will a museum seek funding from, and what types will it avoid or reject ? 2. What limitations or conditions, if any, will the museum accept from the potential sponsor or donor ? 3. How does the museum plan to assess its business partners and private donors ? (Cohen R. [2002], as quoted in : Prokúpek 2025).

3.3.1 Partnerships

The most successful museums are funded by external associations. They have financial partners such as banks and large corporations, and sometimes they are funded by cooperation services. (National Committee)

Museums must navigate complex ethical choices regarding their financial partnerships. They also face challenges in obtaining mutually beneficial partnerships with corporations, given their responsibility to their communities, stakeholders, and the public to remain unbiased and independent from external and internal censorship which is often associated with the for-profit sector (Proteau 2018).

Many examples of unacceptable partnerships could be cited. While European museums are increasingly pressured to become financially independent, this often comes at a cost, as institutions face intense scrutiny from activists and the public regarding their funding sources (Jardonnat 2019). For instance, the British Museum has faced protests for its sponsorship deals with oil companies, highlighting the ongoing tension between financial necessity and ethical standards (Polonsky 2022). Critics argue that such partnerships can create a conflict of interest, especially if the sponsor's business practices are at odds with the museum's mission or values. These situations underscore the need for museums to carefully vet their financial partners and to consider the long-term implications of these relationships on their public image and ethical standing (Prokúpek and Ballarini 2022).

3.3.2 Philanthropy and Donations

Most museums are under the ministry of culture who has a rather small portion of the national budget. They therefore struggle to find finances and sometimes rely on external donors (National Committee)

While philanthropic support can provide crucial funding, it too can occasion ethical challenges (Mateos-Rusillo 2019; Merritt 2019). Donations from controversial donors or organizations can lead to public backlash and damage a museum's reputation. For instance, the Sackler family, associated with opioids and the subsequent crisis (AFP 2019), has made significant donations to various cultural institutions, resulting in intense public scrutiny and calls for museums to sever ties with the family. This situation illustrates the delicate balance museums must maintain between accepting necessary funds and upholding ethical standards.

3.3.3 Accessibility

Other financial resources necessary for museum operations include admission fee income, income from museum shops, and donations from private companies. (National Committee)

Raising admission costs may pose ethical challenges for museums (Althaus et al. 2024). While higher admission fees can help generate much-needed revenue, they can also limit access for lower-income visitors, contradicting the inclusive mission many museums strive to uphold (Stephens 2024). This tension between generating revenue and ensuring accessibility reflects a broader clash of values within the museum sector. The implementation of variable or dynamic pricing strategies for admission fees has been identified as a developing trend in museums (Mairesse 2005; Mairesse 2007).

Museums must find a balance that allows them to sustain their operations while remaining accessible to the public. There are examples of free-entry museums, such as the well-known Smithsonian Institution (Smithsonian Institution, n.d.), but mixed models are emerging wherein museums charge some entry fees to remain financially viable, while attempting to stay inclusive (Stephens 2024). This can involve offering free general admission but charging for certain exhibitions or events. Some museums have tried other strategies, such as offering free admission days, discounted tickets, or tiered pricing based on income (Taylor 2020). In Canada, particularly in Quebec, museum entry is free on the first Sunday of each month. The Louvre in Paris offers free admission on certain days or for specific demographics, such as young people and educators (Musée du Louvre, n.d.). However, the dissensions that followed the increase in the general tariff in this museum clearly show how sensitive is the issue of admission fees (Radio France 2024).

The pay-as-you-stay model has been proposed as an alternative solution (Frey and Steiner 2012). The Weserburg Museum of Modern Art, which implemented such a model, saw their number of visits increase by 42% compared with the same period the previous

year (Merritt 2020). In Brazil, as shown in the regional report, some community museums offer free admission to local residents while charging admission fees to tourists. Charging international visitors is a well-researched field in New Zealand museums (Davidson and McCarthy 2018). But as the Oceania report points out “It is, at this point, difficult to ascertain whether changes in the operating environment for New-Zealand museums would make pricing for international visitors a viable source of revenue.” Furthermore, the report for Oceania discusses the impacts of such measures on local people, for example, the implications of tiered pricing on the relationship of museums with local iwi (indigenous Māori communities). Māori often reside outside of their traditional rohe (homeland) and the proposed pricing policy could see iwi pay to visit taonga (their own cultural treasures). This is likely to be highly controversial, since most New Zealand museums acknowledge that they do not own taonga, but are preserving them on behalf of tribes.

Another form of admission fee revenue comes from annual memberships, which allow visitors an unlimited number of visits. While common in some countries, this is not the most developed form of alternative funding in the world.³⁴ This appears to be a sustainable model which generally increases visitor satisfaction (Rushton 2017). In addition, annual membership revenues can be used to maintain general admission prices for day visitors. Partnerships can also make it possible to offer free entry to underprivileged demographics. The Charles Dickens Museum in London has a partnership-linked free-entry policy in association with charities and community groups (Stephens 2024).

Although museums are innovating their entrance fee strategies, it is difficult to predict their future effectiveness. Questions remain : Will they prove sufficient for museums to be inclusive and to maintain financial sustainability ? Does increasing admission fees have a significant impact on revenues ? Might these strategies seriously harm the democratization and accessibility of museums ? At present, we lack the necessary data to understand the real impacts of increasing admission fees. Furthermore, while some institutions have implemented dynamic paying models, it is difficult to evaluate their impacts over the long-term.

3.3.4 Governance

Notifications of budgetary credits remain a secret in the hands of museum directors and no report accessible in print or online on the budgetary management of museums. (National Committee)

Effective governance provides strategic direction and oversight, with well-structured and diversified boards playing a crucial role. A board composed of members with varied expertise can help set long-term goals and priorities, offering comprehensive perspectives and innovative solutions. Strategic directions align museums’ resources

³⁴ See Chapter II, all figures pertaining to Autonomous Revenue for more information on how this is used by museums.

and efforts with their mission and vision, enabling the efficient achievement of objectives. Ensuring the transparency of funding sources and sponsorships is crucial for maintaining public trust. Museums should regularly report on the sources and uses of their funds through publicly accessible financial statements and annual reports. Transparency helps to build public trust and demonstrates museums' commitment to ethical practices. Additionally, establishing an accountability framework, such as an ethics committee, can help ensure oversight of funding practices and adherence to ethical guidelines.

3.4 Conclusion

Museums face a pivotal moment, in which financial sustainability, environmental responsibilities, ethical considerations and decolonization imperatives pose critical challenges. Innovative funding strategies, such as digital initiatives and corporate partnerships, are crucial for navigating financial uncertainties. ICOM's Action Plan for 2030 provides a framework for environmental sustainability, yet continuous evaluation is necessary.

Balancing ethical integrity with financial needs, managing volunteer reliance, and meeting increased social responsibilities require sustainable operational models. The journey towards sustainability is ongoing, demanding reassessment and strategic planning. The next chapter will propose specific calls for action to further these efforts and ensure that museums fulfill their cultural missions while adapting to contemporary challenges. Through strategic advocacy, innovative practices, and community engagement, museums can enhance their resilience and societal role.

CHAPTER IV – PROPOSED CALLS FOR ACTION

The analysis and findings of the previous chapters shed light on the significant financial challenges confronting museums worldwide. With public funding in decline, rising operational costs, and increasing responsibilities, museums are at a pivotal moment. In response to these issues, IRAPFM has outlined a series of calls for action aimed at key stakeholders, including museums, ICOM National Committees, ICOM International, governments, and civil society. These actions are intended to support financial sustainability, enhance governance, and ensure that museums can remain resilient and continue fulfilling their cultural and educational missions despite the evolving pressures they face.

4.1 To Museums Throughout the World

In light of the critical financial challenges facing museums globally, this section aims to offer concrete proposed calls for action to support the sustainability and long-term viability of these cultural institutions. Museums, now more than ever, must evolve in how they plan strategically, secure funding, and maintain public trust.

The following proposed actions encourage museums worldwide to not only adapt to financial pressures but also take proactive steps aligned with their missions and mandates, within the limits of their resources. Museums can draw inspiration from real-world strategies already implemented in various regions. For instance, the National Museum of Kenya has collaborated with international organizations to secure grants for conservation and educational initiatives, which has strengthened its ability to preserve and promote cultural heritage. Similarly, museums in Brazil have actively engaged with local communities to co-create programs, a strategy that has enhanced both funding opportunities and public participation.

In North America, many museums are increasingly diversifying their revenue streams to ensure financial stability. A notable example is the Monastère des Augustines, which generates independent income through an attached hotel, providing a sustainable source of funding. These examples demonstrate that creative and tailored approaches can help museums remain resilient and thrive as essential pillars of cultural heritage, education, and community engagement. Therefore, IRAPFM proposed the following calls for action, to the extent of museums' means:

- 4.1.1 That museums should implement and maintain ongoing and clear strategic planning, regularly reviewed and amended to remain aligned with their mission,

and that they conduct annual evaluations of new financial approaches to establish sustainable and long-term mechanisms that ensure financial stability.

- 4.1.2 That museums should continue to explore and implement alternative financing strategies to ensure their financial sustainability, critically assess the methods in place, adapting them to their specific contexts, and innovate with new funding methods rather than relying on traditional approaches.
- 4.1.3 That museums should adopt governance guidelines in order to promote accountability and transparency.
- 4.1.4 That museums should implement clear ethical guidelines for donations and partnerships in order to maintain public trust and ensure that all sources of funding are in conformity with museums' mission and mandate without real or presumed conflicts of interest.
- 4.1.5 That museums should adopt advocacy strategies to secure government support.
- 4.1.6 That museums should establish strategic partnerships.
- 4.1.7 That museums, in their annual reports, should describe accurately the complete range of functions they fulfill when addressing their financial requests.

4.2 To ICOM National Committees and Museums' Associations

In response to the ongoing financial and operational challenges faced by museums, the following proposed calls for action are aimed at ICOM National Committees and Museum Associations. These initiatives are designed to strengthen their support for museums as they adapt to changing financial landscapes and sustainability goals. For example, many institutions are in the early stages of integrating ecological strategies, such as the Canadian Museum of Nature, which has implemented energy-efficient lighting and waste reduction programs, aligning with ICOM's sustainability objectives. Advocacy remains critical, as illustrated by the Museums and Galleries Association of Australia (MGAA), which lobbies for more substantial public funding amidst shrinking government support.

By focusing on the dissemination of key information, advocating for increased government funding, and providing essential tools and training, ICOM National Committees and Museum Associations can ensure museums are better equipped to navigate current and future challenges while remaining aligned with their core missions. Therefore, IRAPFM proposed the following calls for action:

- 4.2.1 That ICOM National Committees should ensure the dissemination of all information pertaining to new funding approaches.
- 4.2.2 That ICOM National Committees should support museums in implementing sustainability guidelines.
- 4.2.3 That ICOM National Committees should advocate for higher government funding for museums.
- 4.2.4. That ICOM National Committees should put in place tools and training (accessible online) on critical topics (e.g. funding, governance, ethics, partnerships) in order to better support museums' strategies and sustainability.

4.3 To ICOM

As outlined in the previous chapters, given the ongoing challenges and opportunities museums are facing worldwide, the following proposed calls for action focus on ICOM. These initiatives aim to enhance ICOM's support for museums by fostering innovative funding strategies, promoting sustainable practices, and refining ethical guidelines. For example, museums often confront complex ethical dilemmas, particularly when collaborating with external organizations. A notable instance is the criticism directed at the British Museum over sponsorship agreements with controversial industries, underscoring the importance of ICOM's guidelines in upholding transparency and public trust.

By ensuring the dissemination of key reports, regularly monitoring trends, and fostering collaboration among National Committees, ICOM can help museums stay adaptable, informed, and aligned with best practices. These efforts will better equip museums to address both present and future challenges while continuing to fulfill their essential cultural missions. Therefore, IRAPFM proposed the following calls for action:

- 4.3.1 That ICOM should ensure the dissemination of the IRAPFM Report, including through webinars and conferences, in order to publicize all innovative approaches taken by museums throughout the world in relation to alternative funding strategies.

- 4.3.2 That ICOM should explore ways to support museums in implementing sustainability guidelines.
- 4.3.3 That ICOM should ensure that all National Committees maintain accessible websites.
- 4.3.4 That ICOM should assist museums in keeping abreast of emerging trends and models by regularly monitoring trends and disseminating up-to-date information to museums.
- 4.3.5 That ICOM's Ethics Committee should propose, either in the new Code of Ethics or in revised guidelines on fundraising, specific directions for museums' partnerships, donations, etc.
- 4.3.6 That ICOM should monitor emerging trends and models in museum management and sustainability in order for museums to remain updated and agile.
- 4.3.7 That ICOM should gather and publish, with the support of National Committees, statistics on the number and types of museums in each member country.
- 4.3.8 That ICOM should allocate budgets for further research on museum funding.

4.4 To All Levels of Government

Building on the insights and challenges highlighted in previous chapters, the following proposed calls for action are directed at all levels of government. Museums play an essential role in preserving cultural heritage and fostering community engagement, yet they face mounting financial and operational pressures. It is imperative for governments to provide sustained, transparent, and equitable support to ensure these institutions' long-term sustainability. For instance, museums across all regions analyzed have embraced digital transformation, using virtual exhibitions and online educational programs to enhance financial sustainability. This highlights the importance of government support for such initiatives. Furthermore, the experiences from the COVID-19 pandemic—where governments like those in Canada and Europe provided operational grants to cover essential costs during closures—underscore the necessity of indexed funding that accounts for economic shifts.

By implementing multi-year grants, indexing funding to economic changes, and fostering digital transformation, governments can empower museums to thrive and continue fulfilling their vital missions. These actions will help museums navigate the complexities of today's financial landscape while remaining resilient and responsive to future challenges. Therefore, IRAPFM proposed the following calls for action:

- 4.4.1 That governments should put in place multi-year grants allowing museums to plan more effectively for the long term.
- 4.4.2 That governments should index museum funding to inflation and economic fluctuations, as well as provide accessible tracking and predictive tools enabling more efficient planning.
- 4.4.3 That governments should provide governance guidelines and financial support that will enable museums of all sizes to appoint administrative boards that can guide their strategies through varied expertise and skills.
- 4.4.4 That governments should provide the necessary resources for museums to meet current standards and ensuing increased responsibilities while maintaining their achievements and missions.
- 4.4.5 That governments should allocate recurrent budgets for ongoing digital transformation in order to help museums reach new audiences and enhance their online presence and services.
- 4.4.6 That governments should encourage museum volunteering and memberships through special programs.
- 4.4.7 That governments should ensure a balanced diversity of museum types by directing supervisory ministries to prevent the multiplication of museums with similar mandates within the same territories and communities.
- 4.4.8 That governments should ensure equitable financing for museums, regardless of their status, and that this financing be endowed with maximum transparency in order to guard against discrepancies.

4.5. To Civil Society

Considering the crucial role museums play in preserving culture, fostering education, and engaging communities, the involvement of civil society is essential to their sustainability. The following proposed calls for action emphasize the importance of collective responsibility in supporting museums. Civil society must take an active role in advocating for museums, contributing to their financial and operational health, and participating in their activities. Institutions like Casa Geyer and the Museo Nacional de la Medicina Veterinaria demonstrate how active associations can play a pivotal role in securing substantial funding, underscoring the importance of community engagement in sustaining museums. The Art Gallery of Ontario has significantly increased its revenue through dynamic membership programs, while the Museo Nacional Casa del Acuerdo, adopting a hybrid funding model, established a friends' association to attract private

contributions. Similarly, the Museu de Favela partnered with universities to develop public outreach programs, expanding its network and paving the way for future collaborations.

By strengthening ties with museum organizations and actively engaging with these institutions, civil society can help ensure that museums continue to thrive and fulfill their vital missions for generations to come. Therefore, IRAPFM proposed the following calls for action:

- 4.5.1 That civil society should fulfill its duty by actively protecting and advocating for museums in the media and at all levels of government.
- 4.5.2 That civil society should support ICOM National Committees and Museum Associations through membership, participation and resource mobilization when possible.
- 4.5.3 That individuals should become members of Friends of Museums in order to promote and sustain museum institutions.
- 4.5.4 That civil society participate in museum activities to support their educational and cultural missions.

Conclusion

The proposed calls for action outlined in this chapter are crucial steps toward ensuring the long-term financial stability, governance, and sustainability of museums worldwide. As outlined in the preceding sections, the financial pressures museums face are immense, and addressing these challenges requires coordinated efforts from multiple stakeholders, including museums themselves, ICOM, governments, and civil society. Each of these groups has a critical role to play in fostering the resilience and dynamism of museums.

Museums must innovate, refine their governance models, and adopt new strategies for financial sustainability, while ICOM and its National Committees need to provide strong leadership and support through advocacy, training, and information dissemination. Governments, meanwhile, must recognize the essential role museums play in cultural preservation and community engagement, ensuring they receive adequate, transparent, and equitable funding. Finally, civil society has a key responsibility to actively support museums through participation, advocacy, and resource mobilization.

These proposed calls for action, if fully embraced, have the potential to create a stronger, more adaptable museum sector, capable of navigating the challenges of today's economic landscape and ensuring its continued relevance and impact in the future. Through collaboration and shared commitment, the diverse stakeholders can help museums fulfill their cultural, educational, and social missions for generations to come. The future of museums depends on collective action, and the time to act is now.

CONCLUSION

This report on museum funding around the world demonstrates that these institutions are at a critical crossroads, facing unprecedented financial, ethical and operational challenges that threaten their sustainability and ability to fulfill their cultural and educational missions. Based on quantitative and qualitative data collected from museums across five continents, this report highlights the crucial issues and innovative strategies shaping the future of these essential institutions.

More specifically, this research project aimed to explore and report on four key issues : the global understanding of the term “public funding”, whether the decline in public funding for museums is a global phenomenon, the extent and impact of these declines and, finally, how museums are responding, particularly in terms of developing sustainable new business models.

To answer these questions, a mixed methodological approach was selected, combining both quantitative and qualitative surveys. The quantitative survey targeted ICOM National Committees in order to gather statistical data on the current state and recent evolution of public funding and other museum funding sources. The qualitative survey, conducted by international experts, explored possible solutions and innovative approaches to the decline in public funding. This methodology provided a comprehensive and nuanced understanding of the challenges and opportunities in museum funding worldwide.

However, there are some limitations to this research, which include the variability of responses and the representativeness of the collected data. On the one hand, National Committees may not always have access to periodic statistical data to capture the evolution of the financial situation of museums. On the other hand, it was difficult, if not impossible, to identify and obtain answers from the many diverse government ministries responsible for museums. Therefore, ministerial data was not compiled.

Since the 2008 financial crisis, public funding for museums has declined steadily, a situation further aggravated by the COVID-19 pandemic. This decline has been uneven across regions, creating significant global disparities in museum funding. Traditional funding sources, such as government grants and private donations, are becoming increasingly unpredictable due to economic fluctuations and changing government budget priorities. This instability underscores the necessity for museums to diversify their revenue streams and develop innovative funding models. Additionally, museums are facing increased responsibilities that extend beyond exhibition and conservation. They now also contend with competition, greater social responsibility and the need to engage in community outreach, education and innovation to remain relevant and sustainable.

In response to these financial pressures, museums have demonstrated remarkable resilience and adaptability. Digital transformation has emerged as a crucial strategy, enabling museums to reach a broader audience and generate revenue through online platforms, virtual tours and digital exhibitions. Strengthening community engagement through outreach and educational programs has helped to build a loyal visitor base and to attract local support. Museums also leverage commercial activities, such as ticket sales, retail operations, and unique ventures, including adjacent hotels and research institutes, to increase their revenue. Additionally, seeking private and corporate donations has become an essential part of the funding mix.

As museums increasingly rely on external funding, they must navigate complex ethical issues to maintain public trust and uphold their mission. Establishing strict guidelines for accepting donations and ensuring transparency in all financial transactions are essential means to avoid conflicts of interest and maintain credibility. Museums must balance financial necessity with ethical considerations, selecting partners and sponsors that align with their core values.

To secure their future, IRAPFM has proposed calls for museums and other stakeholders, such as ICOM and its Committees, governments, and civil society, in order to enhance and safeguard museum funding. Among the propositions are such avenues as diversifying revenue streams by expanding membership programs, utilizing crowdfunding, monetizing digitized collections, and developing corporate partnerships. Other vital approaches include securing government support through advocacy for multi-year grants, budget adjustments for inflation, and resources for digital transformation, as well as encouraging volunteerism and memberships through special programs. Maintaining ethical governance by establishing guidelines for donations and ensuring transparency in all funding sources and sponsorship deals is essential for public trust. Finally, enhancing advocacy and community engagement through lobbying for better government support, highlighting cultural, educational and economic benefits, and building strong community connections through inclusive and participatory programs will further contribute to strengthen museums.

In summary, museums are at a crucial moment as they struggle with financial sustainability, environmental responsibilities, ethical considerations and decolonization. By adopting innovative funding strategies, strengthening community and government engagement, and maintaining ethical integrity museums can navigate financial uncertainties and continue to enrich communities globally. Continuous reassessment, strategic planning and global collaboration are essential to ensure the resilience and sustainability of museums. Through collective efforts and innovative practices, museums can overcome, adapt and thrive in the face of financial challenges, continuing to play a vital role in preserving cultural heritage and promoting social growth.

SUGGESTIONS FOR FUTURE RESEARCH

Based on the analysis presented in this report, the IRAPFM suggests the following lines of inquiry for future research with a view to further strengthening museums' resilience:

- Disparities in funding among different types of museums and the relation between resources and expenditures.
- Impacts of alternative funding, particularly digital initiatives and entrance fees.
- Exploration and comparison of museums' financial management and governance models.
- Volunteers in museums: their role, their significance and their impact on museum budgets.
- Funding and the new mandates of museums, namely environmental concerns, decolonization and the museum as a third space.
- New funding models for museums.
- Partnerships between civil society and museums.

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ANNEXES

Consent Form

Consent form : Please read carefully the following statement. If you do not accept these terms, we will be unable to use your answer in our final report.

Title of the research project : Museums and public funding

Lead by : Chaire de recherche sur la gouvernance des musées et le droit de la culture (UQAM), under the direction of Pr. Yves Bergeron

Funded by : ICOM-IMREC, a partnership between ICOM and Shanghai University to establish the International Museum Research and Exchange Centre (IMREC).

Invitation to participate

You are being asked to participate in a survey on the state of public funding for museums around the world.

Purpose of this research

- Get an accurate portrait of public funding in museums around the world;
- Better understand if and how this funding is decreasing and its impact on the institutions;
- Look at innovative and exemplary ways of generating income.

What you will be asked to do

We ask that you complete an online questionnaire. It will take approximately 30 minutes. The questions are related to public funding, variations in funding, and innovative practices.

Your participation is voluntary.

You are free to answer as many questions as you like. However, the research team will be able to include your answers only if 70% of the questions are answered.

Your involvement is anonymous. It will not be possible to know the identity of the person who has filled the questionnaire.

You are answering this questionnaire on behalf of the organization to which it was sent.

Questions and queries

If you have any questions, you can contact the research team at 514-987-3000 poste 2909 or by e-mail à museums.funding@gmail.com

Inquiries on your rights

If you have any questions about your rights, you may contact the Comité institutionnel d'éthique de la recherche avec des êtres humains at (514) 987-3000 ext. 7753 or by e-mail at: [ciereh@uqam.ca](mailto:cierreh@uqam.ca).

Presentation of the survey

Why a survey?

Since 2018, reductions in public funding for museums have consistently been highlighted by ICOM committees as the foremost concern impacting the sector's long-term viability. ICOM-IMREC (The International Museum Research and Exchange Centre) has commissioned an international consortium led by the University of Quebec at Montreal (UQAM) to research this problem. This survey will collect essential data for a deeper comprehension of the situation, facilitate meaningful comparisons, and establish conclusions based on empirical evidence.

This research aims to answer the following questions:

- (1) What does “government funding” mean and how is it understood/used around the world?
- (2) Is the decrease in government funding a global phenomenon?
- (3) Where, how and under what circumstances does this decrease occur? What are its impacts?
- (4) If a decrease occurs, how do museums cope? Can we see new museums' business models emerge as a result?

Your input is critical in providing a well-rounded perspective. By participating, you will contribute to a worldwide pool of data.

Should you have any questions or concerns regarding the survey or the research process, please do not hesitate to reach out at museums.funding@gmail.com. Your cooperation is highly valued, and we look forward to your active participation in this comparative survey.

Best regards,

The Lead Partners of the International Research Alliance on Public Funding for Museums (IRAPFM)

Yves Bergeron, General Director (UQAM)

Michèle Rivet, Scientific and executive director (Independent)

Lisa Bergeron, Financial and administrative director (UQAM)

Camille Labadie, Project coordinator

Heidi Weber, quantitative study coordinator

Léa Le Calvé, research assistant

Methodology

This study is based on a comparative analysis approach. To grasp the changes in public funding for museums, we will establish a pre-VOCID baseline and compare it with the circumstances post-COVID.

To do so, the survey is divided in four sections:

- 1- **General overview:** This section will provide us with a general understanding of the funding framework for museums in your country.
- 2- **Situation pre-pandemic 2008/09-2018/19:** The objective of these questions is to offer an overview of how museums received funding prior to the onset of the COVID crisis.
- 3- **Situation post-pandemic 2021-2022:** The purpose of these questions is to offer insights into the funding of museums in the aftermath of the COVID Crisis. The inquiries in this section have a similar structure to those in section 2 for the sake of making meaningful comparisons.
- 4- **The impacts of variations in funding:** The final section consists of open-ended questions, providing you with the opportunity to share your insights about the situation in your country and any critical aspects you believe should be highlighted or clarified.

The survey will take approximately 30 minutes to complete. We appreciate your time and effort in providing thoughtful responses.

At any time, you can click on “resume later” on the right of the screen to pause your completion and save your progress. Please note that, if you do not save your progress, you will have to start over when you open the survey again.

Definitions

The subsequent definitions pertain to the terminology employed in the survey, facilitating a common understanding of the questions. If you find that these definitions do not accurately represent the situation in your country, please feel free to offer an explanation in your responses.

PUBLIC FUNDING : Public funds or resources provided by the State or various levels of government, i.e. central, state, local, etc. Government funding is either direct or indirect (parapublic).

It is direct when government pledges to finance museums through agreements and policies. It is indirect when it is distributed as non-financial resources through different levels of government in the form of various programs (culture, tourism, infrastructure, etc.).

MUSEUM (PUBLIC/PRIVATE) (fr. Musée public/ Musée privé, sp. Museo público/ Museo privado) : The opposition between public/private, when referring to a museum, refers to how the institution is funded: whether by public funds or by an association, or company, individual or private foundation [...] It can also refer to its status (whether a museum is dependent on a municipality or other public body or one dependent on an association or foundation.) (Dico de musée 2022) ("Museum" in MAIRESSE, François, and International Council of Museums, éd. ICOM Dictionary of museology. Abingdon, Oxon ; New York, NY: Routledge, 2023.)

SECTION 1: GENERAL OVERVIEW

The primary objective of this initial section is to provide us with a comprehensive view of the museum sector in your country.

What country are you filling this survey for?

What is a museum in your country? How is it define?

On estimate, how many museums are there in your country?

- 0-100
- 101-250
- 251-500
- 501-1000
- 1001-1500
- 1501 and more

If possible, please tell us the exact number of museums in your country:

Are any of these museums officially recognized or accredited by the government?

- Yes
- No

How does this affect their funding? Please elaborate.

Do other institutions, such as libraries, community centers, historical sites, etc., receive similar consideration and public funding in your country? Please comment on your answer.

Are there museum associations in your country ?

- Yes
- No.
- If yes, please list them below

On estimate, how many museums, or what percentage of museums, receive public funds?

- 0-9%
- 10-25%
- 26-50%
- 51-75%
- 76-100%

Are the following levels of government responsible for funding museums?

- Central government: - Yes- no
- Regional or state level: - Yes- no
- Municipal level : - Yes- no
- Others: _____

Please list any and all other level of government that are responsible for funding museums.

What proportion of museums in your country receive the majority of their funding from private sources? (Ex.: Non-profit organization, company museums, foundation, etc.)

- 0-9%
- 10-25%
- 26-50%
- 51-75%
- 76-100%

Are there museums which operate with a combination of private and public funding?

- Yes
- No

If yes, how are they classified and could you explain their funding model, when they are neither private or public??

Has the government implemented indirect financing measures for museums (such as tax deductions for acquisitions, tax credits, fundings for special projects, etc.)? Please comment on your answer.

SECTION 2: FUNDING PRE-PANDEMIC (2008/09-2018/19)

This set of questions examines the state of museum funding before the COVID-19 crisis between 2008/09 and 2018/19.

In the last ten years (between 2008/09 and 2018/19), how did public funding change?

- Increased
- Decreased
- Remain stable (including increases following inflation)

On estimate, by how much did it increase or decrease?

- 0-9 %
- 10-25 %
- 26-35 %
- 36 and more %
- Does not apply (funding remained stable)

In the last ten years (between 2008/09 and 2018/19), did the following entities decrease their funding?

- Central government: - Yes- no -does not apply
- Regional or state level: - Yes- no -does not apply
- Municipal level : - Yes- no -does not apply
- Others (please specify): _____

In the last ten years (between 2008/09 and 2018/19), did museums explore alternative sources of revenue?

- Yes
- No

If you answered “yes” to the previous question, what sources provided income? (Select all that apply)

- Government grants or other subsidies
- Patronage/Sponsorship
- Friends and volunteer associations
- Independent income
- Crowdfunding
- Investments
- Donation
- Brand commercialization/Retail
- Other (Please specify): _____

Did you see any new business models emerge in museums between 2008/09 and 2018/19?

- Yes
- No
- If yes, please elaborate.

In 2018-2019 what percentage of the total public budget was allocated for museum funding?

- 0-9%
- 10-25 %
- 26-50 %
- 51-70 %
- 71-100 %

In 2018-2019 for museums that receive public funding, approximately what percentage did this funding represent in their annual budget?

- 0-9%
- 10-25%
- 26-50%
- 51-70%
- 71-100%

Did all museums receive similar amounts or are there significant differences between museums?

SECTION 3: FUNDING POST-PANDEMIC (2021-2022)

This third group looks at the situation in museums after the COVID-19 crisis (2021-2022).

Were there any public financing measures put in place for museums during COVID-19?

- Yes
- No
- If yes, please elaborate.

Are these measures still in place?

- Yes
- No
- If yes, please elaborate.

Between 2018/19 and 2021/22, how did public funding overall change?

- Increased
- Decreased
- Remain stable (including any increase following inflation)

On estimate, by how much did it increase or decrease?

- 0-9 %
- 10-25 %
- 26-35 %
- 36 and more %
- Does not apply (funding remained stable)

Between 2018/19 and 2021/22, did the following entities decrease their funding?

- Central government: - Yes- no -does not apply
- Regional or state level: - Yes- no -does not apply
- Municipal level : - Yes- no -does not apply
- Others (please specify): _____

Between 2018/19 and 2021/22, did museums explore alternative sources of revenue?

- Yes
- No

If you answered “yes” to the previous question, what sources provided income? (Select all that apply)

- Government grants or other subsidies
- Patronage/Sponsorship
- Friends and volunteer associations
- Independent income
- Crowdfunding
- Investments
- Donation
- Brand commercialization/Retail

- Other (Please specify): _____

In 2021-2022 what percentage of the total public budget was allocated for museum funding?

- 0-9%
- 10-25 %
- 26-50 %
- 51- 70 %
- 71-100 %

In 2021-2022 for museums that receive public funding, approximately what percentage did this funding represent in their annual budget?

- 0-9%
- 10-25%
- 26-50%
- 51-70%
- 71-100%

Do all museums receive similar amounts or are there significant differences between museums?

Did you see any new business models emerge in museums between 2018/19 and 2021/22?

- Yes
- No
- If yes, please elaborate.

SECTION 4: IMPACTS OF VARIATIONS IN FUNDING

The aim of this survey is to gain a more comprehensive understanding of the financial circumstances of museums worldwide. We are interested in learning about the challenges they have encountered, the measures they have implemented, and any innovations or initiatives they have explored over recent years in response to various crises.

Between 2018/19 and 2021/22, what were the impacts of the funding decrease in your country? (Select all that apply)

- Job loss
- Museum closure
- Less visitors
- Less outreach programs
- Other (Please specify): _____

Please elaborate on what other impacts occurred due to the funding decrease in your country.

As we conclude, is there any additional information you believe would enhance our final report, which you haven't had the opportunity to mention previously or that you feel merits further discussion?

Ending

We sincerely appreciate your active participation in this survey. Your valuable insights and feedback are essential for gaining a deeper understanding of museum funding around the world and how recent years have reshaped our perception of it.

The data gathered will undergo thorough analysis and be compiled into a comprehensive report. This report will encompass a detailed examination of museum funding on a global scale, including insightful case studies. It is anticipated to be accessible through ICOM by September 2024.

In the interim, if you have any additional insights or information to share about museum funding, such as changes in public financing, innovative funding methods, or any related resources such as reports, articles, or papers, please don't hesitate to reach out to us at museums.funding@gmail.com. Your continued input is greatly appreciated.

Thank you once again for taking the time to answer the survey.

Heidi Weber
Quantitative study coordinator

SECTION 1 – General information

Name of the museum: _____

Aims of the survey

This research aims to answer these four main questions:

- 1) What does “government funding” mean and how is it understood/used around the world?
- 2) Is the decrease in government funding a global phenomenon?
- 3) Where, how and under what circumstances does this decrease **occur**?
 - What is its impact?
- 4) When a decrease occurs, how do museums cope?
 - Can we see new economic models?

Globally, we want to know what you have done in the face of decreasing funding or various budget crises to develop new financial tools in your institution.

Definition of public funding

Government funding for museums are public funds or resources given by the State or various levels/parties of government, i.e. central, state, local, ministry etc.

Government funding is either direct or indirect (parapublic). It is direct when government pledges to finance museums through agreements, policies or programs toward specific goals. It is indirect when it is distributed as non-financial resources (such as tax cuts) and directed through different levels of government in the form of various programs (culture, tourism, infrastructure etc.).

The questionnaire is divided in five sections:

- Group 1 : Your museum
- Group 2 : Funding pre-pandemic (2018-2019 as baseline years)
- Group 3 : Funding during the pandemic (2020-2021 as baseline years)
- Group 4 : Funding Post-pandemic (2022-2023 as baseline years)
- Group 5 : Funding
- Group 6 : Open-ended question

SECTION 2 : Survey

Group 1 : Your museum

G1-Q1 What is the name of your museum?

G1-Q2 : What kind or type of museum is it? Select all that applies

- Art
- History
- Science and technology
- Archeology
- Anthropology and Society Museums
- Memory Museums
- Other (specify)

G1-Q3 : Is it a private, public, or another type of museum?

G1-Q4 : What are the different departments inside your museum? (collection, education, etc.)

Q4.1 Were any of these department downsized due to funding cuts in the last 5 years?

G1-Q5. Do you have volunteers in your organisation?

Q.5.1 What do they do?

Q.5.2 How many are there?

G1-Q6. How many full-time employees are there in the museum (all departments)? How many part-time employees are there in the museum (all departments)?

G1-Q7. Do you use any other type of worker? (Independent, contractual, external, free-lancer, etc.) If yes, how? Is it for specific projects or expertise?

Group 2 : Funding pre-pandemic (2018 and 2019 as baseline years)

G2-Q1. In 2018-2019 what percentage did government funding make up for your museum?

- 0 – 9 %
- 10 - 25 %
- 26 - 50 %
- 51 - 70 %
- 71 - 100 %

G2-Q2. Was the government funding divided between various government levels?

- Yes
- No

G2-Q2.1 If you answered YES, did the following levels fund museums?

- Central government: - Yes- no %
- Regional or state level: - Yes- no %
- Municipal or city level : - Yes- no %
- Others: _____

G2-Q3. In the last ten years (between 2008-2009 and 2018-2019), did government funding decrease?

- No
- Yes

G2-Q3. If YES, by how much?

- 0 - 10 %
- 11 - 25 %
- 26 % and more
 - o specify : _____

G2-Q4. Has this decrease been offset by other sources of income?

- No
- Yes
 - o Totally
 - o Partially

G2-Q4.1 How?

- Autonomous revenue
- government grants or other subsidies
- Other: _____
 - o Please explain

G2-Q5. Were the following impacted by the decrease in funding (in the last ten years)?

G2-Q5.1. Visitor numbers

- No
- Yes
 - o How much did visitor numbers decrease?
 - 1 à 10 %
 - 11 à 20 %
 - 21% and more
 - Comments : _____

G2-Q5.2. Exhibits

- No
- Yes
 - o Less temporary exhibits
 - o Longer exhibits
 - o Others
 - Comments : _____

G2-Q5.3. Decreased Public outreach programs (education, cultural, mediation)

- No
- Yes
 - o Comments: _____

G2-Q5.4. Laying off of staff

- No
- Yes
 - o Permanent
 - o temporary
 - Comments : _____

G2-Q5.5. Percentage of job loss

- No
- Yes
 - o Specify % : _____
 - o Where?
 - Collection/conservation
 - Exposition/exhibits
 - Education/mediation/Public programmes
 - Public service
 - Administration/Management
 - Acquisitions and collection management
 - Others
 - Comments : _____

G2-Q5.6 Decrease in acquisitions and collecting

- Purchase
 - o No
 - o Yes
 - decreased by _____
- Donations
 - o No
 - o Yes
 - decreased by _____
 - Comments : _____

G2-Q5.7 Fewer community engagement projects

- No
- Yes
 - o Examples :
 - Comments : _____

G2-Q5.8. Others. Please let us know any other areas where the funding was decreased.

G2-Q6. Does your museum generate autonomous revenue/independent income?

- No
- Yes

G2-Q6.1 In 2018-2019, what % do did ticket sales currently represent in your annual budget?

- Specify_____

G2-Q6.2 In 2018-2019, What % did renting of space (exhibits, rooms, other) represent in your annual budget?

- Specify_____

G2-Q6.3 In 2018-2019, What % did donations represent in your annual budget?

- Specify_____

G2-Q6.4 What % did sponsorship represent in your annual budget?

- Specify_____

G2-Q6.5 In 2018-2019, What % did the foundation or friends organisation contribute to your annual budget?

- Specify_____

G2-Q6.6 In 2018-2019, What % did paying membership contribute to your annual budget?

- Specify_____

G2-Q6.7 In 2018-2019, What % did the gift shop, restaurant, etc. contribute to your annual budget?

- Specify_____

G2-Q7. Did the financial model or structure changed between 2008 and 2018?

- No
- Yes
 - o Specify

G2-Q8. Did you see any new financial models in other museums during this period?

- No
- Yes
 - o Specify

G2-Q9. During that period, where any particular aspects prioritised in terms of funding?

Group 3 : Funding during the pandemic (2020-2021 as baseline years)

This section looks at the situation in museums during the COVID-19 crisis and the various measure that were put in places to alleviate the problems.

G3-Q1. During that period (2020-2021), did the government funding

- Increase
 - o If so, by how much
- Decrease
 - o If so by how much

G3-Q2. What measure were put in place during the COVID crises to help museums? (Financial or otherwise)? Did your museums put in place special measure during that time, excluding ones put forward by government?

G3-Q3. During that period were there certain aspects that were prioritised in terms of funding? (Departments, aspects of museum practice, building or programmes, capital or operating costs, staffing etc.)

G3-Q4: In 2020-2021, what role did the digital/virtual take inside your museums? If there already were digital programming, virtual media, activities, etc., before the pandemic, how was is continued during the pandemic? If not, were you encouraged to develop this aspect inside your institution?

Group 4 : Funding Post-pandemic (2022-2023 as baseline years)

G4-Q1. In 2018-2019 what percentage did government funding make up for your museum?

- 0 – 9 %
- 10 - 25 %
- 26 - 50 %
- 51 - 70 %
- 71 - 100 %

G4-Q2. Was the government funding divided between various government levels?

- Yes
- No

G2-Q2.1 If you answered YES, did the following levels fund museums?

- Central government: - Yes- no %
- Regional or state level: - Yes- no %
- Municipal or city level : - Yes- no %
- Others: _____

G4-Q3. Between 2020-2021 and 2022-2023, did government funding decrease?

- No
- Yes

G4-Q1. If YES, by how much?

- 0 - 10 %
- 11 - 25 %
- 26 % and more
 - o specify : _____

G4-Q4. Has this decrease been offset by other sources of income?

- No
- Yes
 - o Totally
 - o Partially

G4-Q4.1 How?

- Autonomous revenue
- government grants or other subsidies
- Other: _____

- Please explain

G4-Q5. Were the following impacted by the decrease in funding between 2020-2021 and 2022-2023?

G4-Q5.1. Visitor numbers

- No
- Yes
 - How much did visitor numbers decrease?
 - 1 à 10 %
 - 11 à 20 %
 - 21% and more
 - Comments : _____

G4-Q5.2. Exhibits

- No
- Yes
 - Less temporary exhibits
 - Longer exhibits
 - Others
 - Comments : _____

G4-Q5.3. Decreased Public outreach programs (education, cultural, mediation)

- No
- Yes
 - Comments: _____

G4-Q5.4. Laying off of staff

- No
- Yes
 - Permanent
 - temporary
 - Comments : _____

G4-Q5.5. Percentage of job loss

- No
- Yes
 - Specify % : _____
 - Where?
 - Collection/conservation
 - Exposition/exhibits
 - Education/mediation/Public programmes
 - Public service
 - Administration/Management
 - Acquisitions and collection management

- Others
 - Comments : _____

G4-Q5.6 Decrease in acquisitions and collecting

- Purchase
 - No
 - Yes
 - decreased by _____
- Donations
 - No
 - Yes
 - decreased by _____
 - Comments : _____

G4-Q5.7 Fewer community engagement projects

- No
- Yes
 - Examples :
 - Comments : _____

G4-Q5.8. Others. Please let us know any other areas where the funding was decreased.

G4-Q6. Does your museum generate autonomous revenue/independent income?

- No
- Yes

G4-Q6.1 In 2022-2023, what % do did ticket sales currently represent in your annual budget?

- Specify_____

G4-Q6.2 In 2022-2023, What % did renting of space (exhibits, rooms, other) represent in your annual budget?

- Specify_____

G4-Q6.3 In 2022-2023, What % did donations represent in your annual budget?

- Specify_____

G4-Q6.4 In 2022-2023 what % did sponsorship represent in your annual budget?

- Specify_____

G4-Q6.5 In 2022-2023, What % did the foundation or friends organisation contribute to your annual budget?

- Specify_____

G4-Q6.6 In 2022-2023, What % did paying membership contribute to your annual budget?

- Specify____

G4-Q6.7 In 2022-2023, What % did the gift shop, restaurant, etc. contribute to your annual budget?

- Specify____

G4-Q7. During 2022-2023, did the financial model or structure changed between

- No
- Yes
 - o Specify

G4-Q8. During 2022-2023, did you see any new financial models in other museums?

- No
- Yes
 - o Specify

G4-Q9. During 2022-2023, where any particular aspects prioritised in terms of funding?

Group 5 : Funding

This section contains general questions about funding and the cost of running a museum. Please answer with as much detail as you can.

In your country, how do you define public funding?

G5-Q1. If your government funding has decreased in the last ten years, what are the impacts of the funding decrease in your museum?

G5-Q2. If your government funding has decreased in the last ten years, what steps, initiatives or programs were put in place to cope with the decrease in funding?

G5-Q3. Did the changes brought about by the pandemic modify in any way the museum and the way it is managed?

G5-Q4. Was funding available for a specific reason after the COVID-19 crisis? (better communication, digital media, staff subsidies, subsidies etc.)

G5-Q5. In the last five years, were museums encouraged to invest in digital/virtual media, or any other form of new technology? Did this occur in any specific part of the museum sector?

G5-Q6. In the last five years, were any departments, divisions or teams closed or downsized? Why?

G5-Q7. In the last five years, was there a decrease or an increase in collecting/acquisitions?

G5-Q8. In the last five years, were any projects scrapped cancelled or deferred due to a lack of funding?

G5-Q9. Has your museums sourced, or discussed sourcing, any of the followings: (Select all)

- Operational funding
- Special project funding
- Independent funding
- Crowdsourcing
- Donations
- Brand commercialization
- Retail/E-commerce
- Renting venues
- Others (Open ended question)

Group 6 : Open-ended question

The purpose of this survey is to better understand the current financial situation of museums around the world. We want to know and understand the challenges you face and the steps that you have put in place as well as any innovations or initiatives you have explored over the last few years to deal with the various crises.

In closing, is there anything else you feel would be beneficial to our final report that you would like to share with us? Something you did not say previously, or that you feel deserves more space.

Are you aware of museum's with original or innovative practices in terms of funding?

III: Complete list of the characteristics from the surveyed museums

	Geographical zone	Countries	Museums	Type	Status	Funding
1	Africa	Botswana	Phuthadikobo Museum	History/Archaeology	Public	Public/Other
2	Africa	Burkina Faso	The Georges OUEDRAOGO Music Museum	Ethnography/Other-Music	Public/National	Public/Autonomous
3	Africa	Burkina Faso	Musée de l'Eau du Burkina Faso	Other-Water and culture	Private	Mixed
4	Africa	Burkina Faso	Musée RAYIMI	Ethnography	Private	Private
5	Africa	Burkina Faso	Musée Mgr Joanny Thévenoud	History/Science	Private	Mixed
6	Africa	Burkina Faso	Musée Ethnographique et du Conservatoire Botanique	History	Public/National	Private
7	Africa	Burkina Faso	Musée Communal Sogossira SANON	Art/Ethnography	Public/National	Public
8	Africa	Cameroon	Blackitude Museum	Art/History	Private	Private
9	Africa	Gambia	National Museum of the Gambia	Art/History	Public/National	Public/Autonomous
10	Africa	Kenya	National Museums of Kenya	Art/Science	Public/National	Mixed
11	Africa	Morocco	Maroc Telecom Museum	Science	Public/National	Mixed

III: Complete list of the characteristics from the surveyed museums

12	Africa	Namibia	National Museum of Namibia	History/Archaeology	Public/National	Mixed
13	Africa	Seychelles	Seychelles National Museum	Art/History	Public/National	Public/Autonomous
14	Africa	South Africa	KwaZulu-Natal Museum	History/Science	Public/National	Public/Autonomous
15	Africa	South Africa	La Motte Museum	Art/History	Private	Private
16	Africa	South Africa	Afrikaans Language Museum and Monument	History/Other-Language	Public/National	Public/Autonomous
17	Africa	South Africa	Sanlam Archive and Museum	History/Other-Insurance and financial history	Private	Private
18	Africa	South Africa	!Khwatsha Heritage Centre	Ethnology/Other-Anthropology	Private	Public/Private
19	Africa	South Africa	South African Post Office Museum	Other-Philately	Public/National	Public/Autonomous
20	Africa	South Africa	University of Pretoria Museum	Art/History	Public/University	Public/Private
21	Africa	Tanzania	National Museum of Tanzania	Art/History	Public/National	Public/Autonomous
22	Asia (eastern)	China	Shanghai Museum	Art/History	Public/National	Public
23	Asia (eastern)	China	Shaanxi History Museum	History	Public/National	Public

III: Complete list of the characteristics from the surveyed museums

24	Asia (eastern)	China	Emperor Qinshihuang's Mausoleum Site Museum	Archeology/History	Public/National	Autonomous
25	Asia (eastern)	China	Ningxia Museum	Archeology/History	Public/National	Public
26	Asia (eastern)	China	Xi'an Qujiang Museum of Fine Arts Art	History	Private	Mixed
27	Asia (eastern)	China	Zhengzhou Museum	History	Public/National	Public
28	Asia (eastern)	Japan	National Art Centre, Tokyo	Art	Public/National	Mixed
29	Asia (eastern)	Japan	National Museum of Modern Art, Tokyo	Art	Public/National	Public
30	Asia (eastern)	Japan	Kyoto National Museum	Art/History	Public/National	Public
31	Asia (eastern)	Japan	Sen-oku Hakukokan Museum	Art/History	Private	Private
32	Asia (eastern)	Japan	Idemitsu Museum of Arts	Art	Private	Private
33	Asia (eastern)	Korea	National Museum of Korea	Archeology/History	Public/National	Autonomous
34	Asia (eastern)	Korea	National Folk Museum of Korea	Other-Folk	Public/National	Public
35	Asia (eastern)	Korea	National Museum of Korean	History	Public/National	Public

III: Complete list of the characteristics from the surveyed museums

		Contemporary History			
36	Asia (eastern)	Korea	Seoul Museum of History	History	Public/National Public
37	Asia (eastern)	Korea	Busan Museum Archeology	Archeology/History	Public/Provincial Public
38	Europe	Belgium	Musée Royaux des Beaux Arts	Art	Public/Regional Public
39	Europe	Estonia	University of Tartu Natural History Museum and Botanical Garden	Science	Public/National Public
40	Europe	France	Musée de la Romanité	Archeology	Public/Regional Public/Private
41	Europe	France	L'institut du Monde Arabe	Other-Interdisciplinary	Private Public/Private
42	Europe	Italy	Museo Nazionale del Cinema	Art	Public/National Public/Private
43	Europe	Italy	Museo Nazionale dell'Automobile	Science	Public/National Public/Private
44	Europe	Netherland	Van Gogh Museum	Art	Public/National Public
45	Europe	Portugal	Casa-Museu Abel Salazar	Art/Science	Public/Local Public
46	Europe	Portugal	Museu Municipal de Tavira	Art/History	Public/Local Public

III: Complete list of the characteristics from the surveyed museums

47	Europe	Spain	Casa Batlló	Other-House museum	Private/Local	Private
48	Europe	Spain	Casa Museo Pau Casals	Other-House museum	Public/Regional	Public
49	Europe	Spain	Ecomuseo La Ponte	History/Science	Public/Regional	Public
50	Europe	Spain	Ecomuseu de les Valls d'Àneu	Art/History	Public/Local	Public
51	Europe	Spain	Fundació Pilar i Joan Miró a Mallorca	Art	Public/Local	Public
52	Europe	Spain	Museo Arqueológico de Córdoba	Archeology	Public/Regional	Public
53	Europe	Spain	Museo Arqueológico Provincial	Archeology	Public/Local	Public
54	Europe	Spain	Museo de la Evolución Humana	Archeology/Science	Public/Regional	Public
55	Europe	Spain	Museo Guggenheim Bilbao	Art	Private/Regional	Private
56	Europe	Spain	Museo Nacional de Antropología	Anthropology	Public/National	Public
57	Europe	Spain	Museu etnològic i de les Cultures del Món	Anthropology	Public/National	Public
58	Europe	Spain	Museu Memorial de l'Exili	History	Public/National	Public
59	Europe	Spain	Museu del Ferrocarril	Science	Public/National	Public
60	Europe	Spain	Museu del Montseny	Anthropology	Public/Local	Public

III: Complete list of the characteristics from the surveyed museums

61	Europe	Spain	Museu del Pueblu Asturiano	History/Anthropology	Public/Regional	Public
62	Europe	Spain	Museu del Ter	History/Science	Public/Regional	Public
63	Europe	Spain	Musèu dera Val d'Aran	Art/History	Public/Local	Public
64	Europe	Spain	Museu Nacional d'Art de Catalunya	Art	Public/Regional	Public
65	Europe	Spain	Museu Nacional de la Ciència i la Tècnica	Science	Public/Local	Public
66	Europe	Sweden	The Vasa Museum	Archeology/Anthropology	Public/State	Public
67	Europe	United Kingdom	Black Country Living Museum	History/Science	Private/Regional	Private
68	Europe	United Kingdom	Natural History Museum	History/Science	Public/Regional	Public/Private
69	Latin America and Carribbean	Argentina	Museo Histórico Sarmiento	History	Public	Public
70	Latin America and Carribbean	Argentina	Museo Nacional Casa del Acuerdo	History	Public	Public
71	Latin America and Carribbean	Brazil	Casa Geyer	Art/History	Public	Public

III: Complete list of the characteristics from the surveyed museums

72	Latin America and Carribbean	Brazil	Casa Museu Ema Klabin	Art/History	Private	Mixed
73	Latin America and Carribbean	Brazil	Instituto Ricardo Brennand	Art/History	Private	Public/Autonomous
74	Latin America and Carribbean	Brazil	Museu das Comunicações e Humanidades (MUSEHUM)	Art	Private	Mixed
75	Latin America and Carribbean	Brazil	Museu da Memória e Patrimônio da UNIFAL-MG	History/Science	Public	Public
76	Latin America and Carribbean	Brazil	Museu da Vida Fiocruz	Science	Public	Public
77	Latin America and Carribbean	Brazil	Museu das Remoções	Art	Association	Autonomous
78	Latin America and Carribbean	Brazil	Museu de Arqueologia e Etnologia da UFPR	Archeology/Ethnology	Public	Public
79	Latin America and Carribbean	Brazil	Museu de Arte de Belém	Art	Public	Public/Autonomous
80	Latin America and Carribbean	Brazil	Museu de Favela	Society-Community	Association	Autonomous

III: Complete list of the characteristics from the surveyed museums

81	Latin America and Carribbean	Brazil	Museu de Imagens do Inconsciente	Art/Science	Public	Public
82	Latin America and Carribbean	Brazil	Museu do Homem do Nordeste	Other-Anthropology	Public	Public
83	Latin America and Carribbean	Brazil	Museu Histórico do Tocantins	History	Public	Public
84	Latin America and Carribbean	Brazil	Museu Nacional do Rio de Janeiro	Science	Public/National	Public
85	Latin America and Carribbean	Brazil	Museu Victor Meirelles	Art	Public	Public
86	Latin America and Carribbean	Chile	Parque por la Paz Villa Grimaldi	Society-Community/Other-Human rights	Public	Mixed
87	Latin America and Carribbean	Costa Rica	Museo de la Identidad y el Orgullo	Other-Human Rights	Private	Autonomous/Private
88	Latin America and Carribbean	Cuba	Museo Nacional de la Medicina Veterinaria	History	Association	Autonomous
89	Latin America and Carribbean	Ecuador	Museo Antropológico y de Arte Contemporáneo	Art/Other-Anthropology	Public	Autonomous

III: Complete list of the characteristics from the surveyed museums

90	Latin America and Carribbean	Mexico	Memorial del 68 y Movimientos Sociales	Other-Memory	Public	Public
91	Latin America and Carribbean	Mexico	Museo Soumaya Fundación Carlos Slim	Art	Private	Private
92	North America	Canada	Aga Khan Museum	Art	Private	Mixed
93	North America	Canada	Art Gallery of Ontario	Art	Public/Provincial	Mixed
94	North America	Canada	Baile nan Gàidheal Highland Village	History	Public/National	Mixed
95	North America	Canada	Bata Shoe Museum	Ethnology/Other-Shoes	Private	Mixed
96	North America	Canada	Canadian Museum for Human Rights	Other-Human Rights	Public/National	Mixed
97	North America	Canada	Espace pour la vie	Science	Public/Provincial	Mixed
98	North America	Canada	Monastère des Augustines	Art/History	Public/Provincial	Mixed
99	North America	Canada	Musée d'art de Joliette	Art	Public/Provincial	Mixed
100	North America	Canada	Musée des cultures du monde	Art/History	Private	Mixed
101	North America	Canada	Musée McCord Stewart	History	Private	Mixed

III: Complete list of the characteristics from the surveyed museums

102	North America	Canada	Musée national des beaux-arts du Québec	Art	Public/Provincial	Mixed
103	North America	Canada	Museum of Anthropology (University of British Columbia)	Art/Other-Antropology	Public/University	Mixed
104	North America	United States of America	Cleveland Museum of Art	Art	Other	Mixed
105	Oceania	Pacific	Samoa Museum Fale Mata'aga	Other-Interdisciplinary	National	Public
106	Oceania	Pacific	EfKS Museum Samoa	Other-Religion	Private	Private
107	Oceania	New-Zealand	Experience Wellington	History/Art	Public/Other	Public/Council
108	Oceania	New-Zealand	Te Papa	Other-Interdisciplinary	Public/National	Public/Mixed
109	Oceania	New-Zealand	New Zealand Cricket Museum	History	Private/Association-community	Private/Mixed
110	Oceania	New-Zealand	Kauri Museum	History	Private/Association-community	Autonomous
111	Oceania	New-Zealand	Whirinaki Whare Taonga	Art/Society-Community	Public/Other	Council
112	Oceania	New-Zealand	Christchurch Art Gallery	Art	Public	Public/Council
113	Oceania	New-Zealand	Waitaki Museum and Archive Oamaru	History	Public	Council

III: Complete list of the characteristics from the surveyed museums

114	Oceania	New-Zealand	Whanganui Regional Museum	History/Science	Public	Public/Other
115	Oceania	Australia	NMA Canberra	History/Science	Public/National	Public
116	Oceania	Australia	MONA Hobart	Art	Private	Private
117	Oceania	Australia	Australian Museum Sydney	Ethnology/Science	Public/National	Public
118	Oceania	Australia	Powerhouse Sydney	Science	Public/Other	Public/Mixed
119	Oceania	Australia	Flagstaff Hill Maritime Museum and Village	History/Society-Community	Public/Other	Public