



Llywodraeth Cymru
Welsh Government



Spotlight on Museums 2015

Report for Museums,
Archives and Libraries Division,
Welsh Government

Spotlight on Museums 2015

Research on behalf of Museums, Archives and Libraries
Division, Welsh Government

Produced by Tom Newman and the South West Museum Development Programme on behalf of the Museums,
Archives and Libraries Division, Welsh Government

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gathering this data and is grateful to all the museums
which contributed to this survey.

Further information and related documents

Large print, Braille and alternate language versions
of this document are available on request.

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Welcome...

to this, the third edition of the Welsh Government's survey of museums. The information provided by museums of all types and sizes across Wales provides an important picture of how active museums are in caring for our heritage and meeting the needs of their communities. Many museums are working to engage different audiences, to address the recommendations in Baroness Kay Andrews' seminal report on how culture can improve the life chances of those in our most disadvantaged communities. Through our Fusion programme, we seek to ensure that our museums are not only accessible to all, but are enjoyed by all.

You will see from this report that museums continue, despite increasing challenges, to be the heart of communities, running events and exhibitions and providing education and outreach opportunities. It is clear that much of this would be impossible without the support of thousands of volunteers as well as a committed staff and I would like to offer my personal thanks to them all.

In 2010, the Welsh Government published 'A Museums Strategy for Wales 2010-15', the first such national museums strategy in the UK. The aims and actions it contains were based on consultation and the information gathered for the first Spotlight Survey in 2006.

We have now reached the third Spotlight survey, providing us with a comprehensive overview of changes in the museums sector since 2006. The key issues and challenges that arise from Spotlight 2015 will help inform the 2016-2021 museums strategy.

The 2015 Expert Review of Museums published a series of recommendations for creating a resilient museums sector in Wales. Finding innovative ways to deliver museum services is crucial to the sector's survival and to do this we need evidence of the current situation. Spotlight provides us with the facts – how many qualified museum staff there are, where funding comes from, how many visitors they have and what services they provide to their communities.

The museum landscape in Wales is undoubtedly changing. Some local authorities have already moved their museums to trusts and others are looking at new ways to deliver services on reduced budgets. The Spotlight surveys show the context in which these changes are taking place.

I really appreciate the time and effort which museum staff, volunteers and trustees have given to completing the survey. I ask them to continue to support the survey, and to encourage others to complete it.

Ken Skates AM

Deputy Minister for Culture, Sport and Tourism



A handwritten signature in blue ink, appearing to read 'Ken Skates', written in a cursive style.

1. Summary

Last year the fourth museums survey was carried out in Wales with previous surveys undertaken in 2011, 2006 and 2002. This report presents the findings of the 2015 survey and explores trend data since 2002.

The Museums, Archives and Libraries Division of the Welsh Government (MALD, formerly CyMAL) estimates that there are some 160 organisations in Wales which could be called 'a museum'. 80 museums responded to the survey giving a 50% return which is considerably lower than the 66% that responded in 2011. The return rate amongst museums in the Accreditation scheme was 72% with responses from 77 museums. Trends are based on responses from a core group of 54 museums which responded to the previous three surveys.

Of the respondents, 40% (32) were run by local authorities, 34% (27) were independent charities, 13% (10) were National Trust properties with the rest being Amgueddfa Cymru – National Museum Wales (Amgueddfa Cymru) (7), university (2) or military (2) museums.

Standards of practice

To measure standards of practice, museums selected a number of qualitative 'Range Statements' which most closely matched their situation.

- Standards are rising on average and most museums exceed the minimum standards required by the Accreditation Scheme for museums in the UK.
- Standards in staff and volunteer development and access (re-display, interpretation and bilingual provision etc.) have shown the greatest improvement since 2011.
- The provision of formal learning and suitable buildings (maintenance and management) both fell during the same period while the provision of informal learning remains more or less the same as in 2011.

- Since Spotlight began in 2002, policy and planning and audience development and marketing have seen the greatest improvement. The provision of formal learning is the only area to have fallen overall.

Museums for Everyone

- There were 3.8 million visits to Wales in 2014. Based on the responses from museums that provided visit data for all years 2011 to 2014, visit numbers fell by 3.3%.
- Visits to local museums (non-Amgueddfa Cymru and non-National Trust) rose by 1.3% during the same period.
- Children (under-16) account for 21% of visits to museums.
- Museums provided 9,178 learning sessions and activities on-site which engaged 500,586 participants in 2013/14.
- 60 museums (75% of respondents) ran exhibitions, events or activities targeted for different equalities areas including age, sexual orientation, gender, language, belief and disability.
- Museums delivered 2,419 learning and outreach sessions and activities which engaged 124,992 participants outside of the museum.
- The economic impact of visits to museums in Wales in 2014 was £82,780,467. This is based on calculations using the Economic Impact Toolkit published by the Association of Independent Museums.

A Collection for the Nation

- Museums in Wales care for approximately 5.5 million items (based on results from 2011).
- 49% of museum stores are already full and a further 21% will be full by 2020.
- Collections care and management standards had the highest levels of practice with a 4.3 average across the related range statements.
- 12,984 items were acquired by museums either by purchase or gift in 2013 and 2014.

Working Effectively

- 3,496 people work in museums in Wales.
- Volunteers form 66% of the workforce, up from 62% in Spotlight 2011.
- 177,815 hours were contributed by volunteers in 2013/14 worth £1.37 million.
- There were 1,196 paid staff in museums with 902 Full Time Equivalents.
- 10 Accredited museums were entirely volunteer-run with no paid staff. These were all independent museums.
- Almost half of the museums in Wales provide free entry.
- Budgets are falling. On average, local museum budgets fell by 1% between 2011/12 and 2013/14.
- The levels of public subsidy received by museums varies considerably. For independent museums, public subsidy accounted for around 20% of their income, while for local authority museums it accounted for 76%.
- Of the 53 museums that stated they received local authority support (whether in-kind or financial), four reported a rise in support between 2013 and 2015, 22 said that it had stayed the same while 27 reported a fall in support.

Local Museums and Amgueddfa Cymru

In addition to the key strategic themes of the survey, Amgueddfa Cymru sought information about the extent to which local museums used its services.

- 60% of local museums that responded to the survey (44) said they accessed a service provided by Amgueddfa Cymru.
- The most common forms of support accessed by local museums were collections advice, conservation advice and object loans.
- Small local authority or independent museums were most likely to access services provided by Amgueddfa Cymru.

Conclusion

- Spotlight on Museums 2015 presents a snapshot of the sector in 2014 and establishes a baseline of financial benchmarks from the 2013/14 financial year that can be used by museums going forward. The report shows that while visit numbers have experienced recent decline, they have still increased over the last decade. It points to a sector that, despite the financial challenges of recent years, has reached out to audiences and delivered extensive learning and community engagement opportunities as well as having a burgeoning volunteer base. Sector standards are continuing to rise, particularly in the areas of staff and volunteer development and policy and planning, two highly interrelated areas. Disability access remains a clear area for development while storage will become an increasingly challenging issue over the next few years.

2. Overview

Spotlight on Museums 2015 is structured around and relates to issues identified within the three key principles of 'A Museums Strategy for Wales 2010-15'¹

- Museums for Everyone.
- A Collection for the Nation.
- Working Effectively.

This report presents facts, figures and analyses which museums and museum services can use to demonstrate their social and economic contribution to their communities and benchmark against peers to identify opportunities to improve performance.

Following Spotlight on Museums 2015, MALD will explore the feasibility of a light touch annual survey of core data to encourage museums to regularly collect this data on an ongoing basis. It is anticipated this would support museums to evidence their impact more effectively.

Spotlight on Museums 2015 questions deliberately required museums to consider issues within the revised Accreditation Scheme for museums in the UK² launched in 2011. The Accreditation Scheme sets nationally agreed standards for museums across three key areas of organisational health, collections management and users and their experiences. The scheme supports museums to focus on standards, identify areas for improvement and develop their resilience through forward planning.

The Accreditation Standard enables differentiation between organisations which merely collect and display artefacts, and genuine museums committed to meeting the UK definition of a museum in full, which states:

'Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society.'³

2.1 Process

Spotlight on Museums 2015 builds on data gathered in 2011 and 2006, and on data gathered by the Council for Museums in Wales for the 'Museum Mapping 2002' survey and report. The 2015 survey draws on experience from the West Midlands regional survey of museums, 'Fast Forward'⁴. For the first time a number of the questions were also aligned with regional surveys undertaken by Museum Development providers in England to enable comparisons across the two nations.⁵

The questions asked in Spotlight 2011 were reviewed in order to reduce the number of questions that museums were being asked. Much of the detail gathered in the Spotlight 2011 survey in relation to collections now forms part of the Accreditation submission and was therefore removed to minimise duplication in gathering data from museums.

The survey was conducted online and opened in mid-March 2015 and ran until the end of October 2015 to maximise the opportunity museums had to respond. Museums were notified about the survey via direct email and MALD's current awareness service⁶. Monthly reminders were sent to museums, and advice and support on completing the survey was available via email.

¹ Museums Strategy for Wales 2010-2015, Welsh Assembly Government, 2010

www.gov.wales/topics/cultureandsport/museums-archives-libraries/museums/strategy/?lang=en

² The Accreditation Scheme for Museums in the UK is operated by Arts Council England and is administered in Wales by MALD. Accreditation is a widely accepted voluntary standard for museums. For full details about the Accreditation scheme please see the Arts Council England website.

www.artscouncil.org.uk/what-we-do/supporting-museums/

³ Museums Association 1998: www.museumsassociation.org/ethics/code-of-ethics

⁴ Fast Forward 2010. The Survey of Museums and Galleries in the West Midlands', Fast Forward 2010 Editorial Board 2011 www.collectionstrust.org.uk/events/item/1144-fast-forward-2010

⁵ www.southwestmuseums.org.uk/publications-resources/research-and-data/

⁶ Current Awareness Service for Museums www.gov.wales/topics/cultureandsport/museums-archives-libraries/museums/current-awareness/?lang=en

Data from Spotlight on Museums 2015 is being made available in three ways:

- Printed report – available as a download from the MALD website.
- Online – via the MALD website.
- Excel spreadsheet – available on application to MALD.

2.2 Understanding the data

Information supplied by museums is based on four different types of questions:

- Yes/No questions, e.g. do you have a website?
- Numerical evidence questions, e.g. budget and visit figures for museums.
- Free text questions to provide additional information. Answers have been used to illustrate the report.
- Self-assessment questions (Range Statements) to measure levels of practice across a number of museum activities.

2.2.1 Sample size

All organisations which regard themselves as museums were invited to participate. MALD estimates that there are approximately 160 in Wales. 80 museums responded to the survey giving a return rate of 50% which is considerably lower than the 66% that responded in 2011. There was a higher return rate amongst museums in the Accreditation scheme with 77 museums responding, equating to a 72% return rate.

When considering the responses, the following should be borne in mind:

- Not all museums answered all the questions.
- Percentages in the report have been rounded to the nearest whole number.
- 'All' museums is every museum which submitted a return in 2015.
- The 'core group' of museums refers to the museums that have responded to all four Spotlight surveys.
- Where differences are small and response levels low, care must be taken when interpreting the data.

- Data relevant to budgets should be viewed as approximate or indicative, as different accounting methodologies are used in different museums and a number of museums operate a different financial year to April to March.
- For multi-site organisations where a museum service provides central support to a number of related museums which it may, or may not, run directly, their responses where relevant have been aggregated under one 'parent' museum. The resources (staff, materials and budgets) they administer are spread across a number of museums but for the purposes of this report are only shown against the 'parent' museum, National Museum Cardiff is one example. Their detailed data needs to be read carefully as their resources may look disproportionate to their direct museum provision when in fact their resources are shared across a number of museum venues.

2.2.2 Categories of museum used for analysis

Three main categories of museum are used for analyses throughout the report:

- **Type** of museum determined by funding source and governance model.
- **Size** of museum determined by annual visit figures.
- **Core group** – museums which responded to the survey in 2002, 2006 and 2011. A list of museums which constitute the core group is given in Appendix C. This group has reduced from 73 to 54 since 2006 and is now comprised only of Accredited museums.

2.3 Type of museum

Of the 160 organisations in Wales, those which responded have been divided into four categories of museums, depending upon funding arrangements and governance.

- 7 national museums, Amgueddfa Cymru (funded by the Welsh Government).
- 32 local authority museums (funded and operated directly by Local Authorities).

- 31 independent museums (funded and run independently of local or national government) – this category includes museums within universities; museums run for army regiments and charities. These may receive some form of public funding through local authority or government support, e.g. through grants or professional advice.
- 10 National Trust properties.

Figure 2.3.1: Responses by type of museum

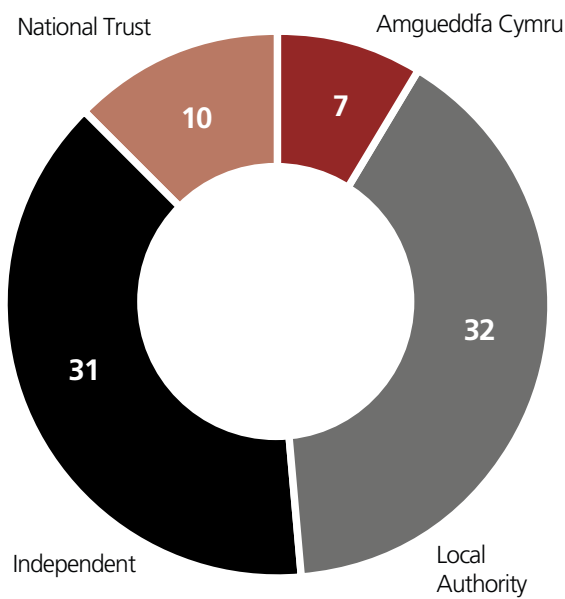
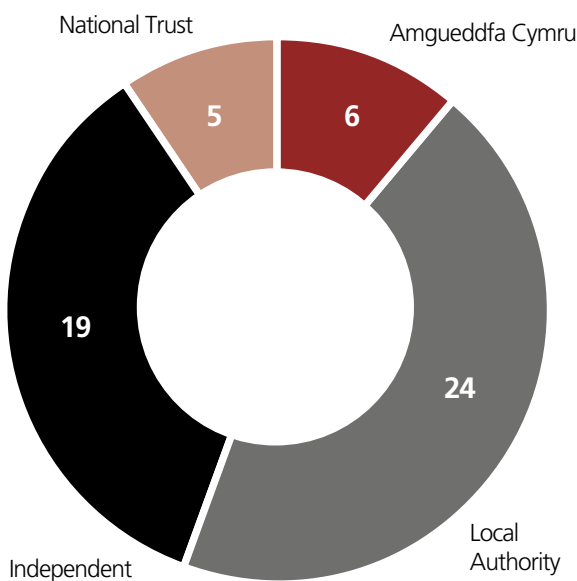


Figure 2.3.2: Core group museums by type



2.4 Size of museum

Museums in Wales range from large national museums (Amgueddfa Cymru) to small community organisations. For the purposes of this report, the size of museums has been determined by the average annual number of visits they attracted between 2010 and 2014. If for any reason a museum did not provide visit numbers for one of the years then the average of the years that they did provide has been used. A list of museums by size category is given in Appendix A.

Large

- 18 museums attract, on average, over 50,000 visits per year. Four of the six most visited museums between 2011 and 2014 were part of Amgueddfa Cymru. This includes St Fagans: National History Museum, which is also one of the largest tourist attractions in Wales with an average of just under 600,000 visits annually.

Medium

- 28 medium sized museums attract an average of between 10,000 and 50,000 visits.

Small

- 31 small museums attract an average of fewer than 10,000 visits annually.
- Of the remaining respondents, one was closed during the period, one was unstaffed and therefore visitor numbers were not submitted and one museum gave no explanation for not providing visit figures.

Figure 2.4.1: Responses by size of museum

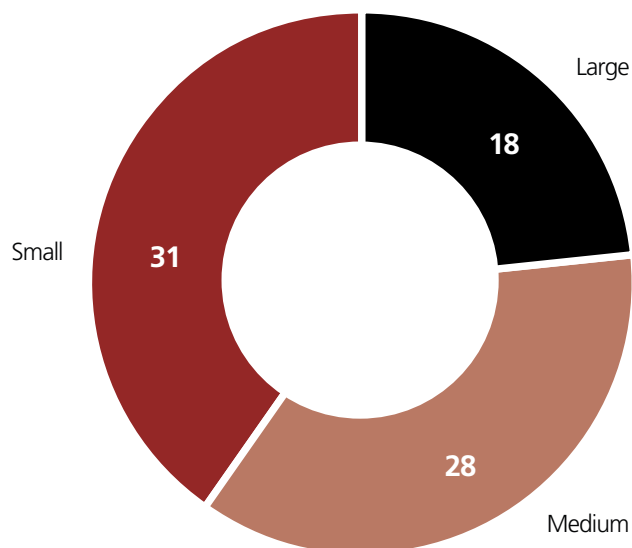
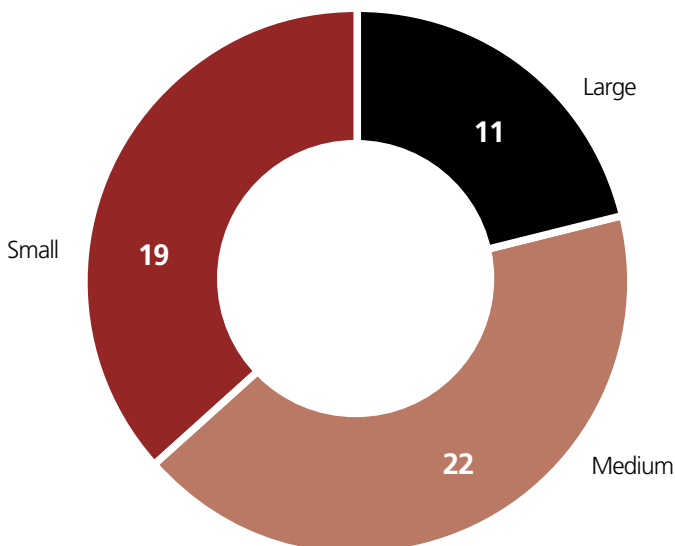


Figure 2.4.2: Core group museums by size



2.5 Accreditation Status

Accreditation is a free, voluntary scheme open to any eligible organisation which meets required standards. The Accreditation scheme sets nationally agreed standards for museums across three key areas of organisational health, collections and users and their experiences. The scheme supports museums to focus on standards, identify areas for improvement and develop their resilience through forward planning. Organisations which already collect, interpret and claim to preserve artefacts or specimens for public benefit are encouraged to join the scheme.

In previous Spotlight reports comparisons have been made between Accredited and non-Accredited museums, however, this year only three respondents were not already Accredited or formally working towards Accreditation and therefore comparisons would not be based on sufficient data. Museums in Wales which participate in the Accreditation scheme are listed on the MALD webpages⁷.

2.6 Levels of practice in museums

Spotlight examines how well museums are doing across 13 areas of work, using self-assessed Range Statements. The Range Statements take areas of work which demonstrate how museums serve their communities, manage their collections and govern themselves, and break these down into different levels of activity. Each statement goes from 1 to 6, where 1 is little or no work undertaken and 6 equals best practice. Range Statements enable museums to identify where they are doing well, and where they need to develop further. They are an indication of activity level and are not scores and there is no expectation that all museums will eventually reach level six in all areas. Museums should aspire to reach the highest level most appropriate for the size and scale of their organisation.

Range Statements were used in the Wales 'Museum Mapping 2002' survey by the Council for Museums in Wales. They were updated for the 2006 Spotlight on Museums survey and new ranges were introduced. Some slight updating was also applied in 2015. The Range Statements used to measure service levels in this report are based on the Accreditation Standard. Level three equates to the requirements of Accreditation.

The 2015 Range Statements are published in Appendix B at the end of this report.

2.6.1 Accreditation and Range Statements

'A Museums Strategy for Wales' uses the number of museums achieving level three across the Range Statements as an indication that museums are continuing to work to the

⁷ www.gov.wales/topics/cultureandsport/museums-archives-libraries/museums/accreditation/?lang=en

Accreditation Standard. On average, Accredited museums exceed the minimum requirements and consistently achieve higher standards. There were 41 museums within the Accreditation

scheme that identified themselves as achieving below level three in at least one area. These will be identified as required areas for improvement for future Accreditation returns.

Figure 2.6.1-1: Average levels of practice since 2022 across all museums

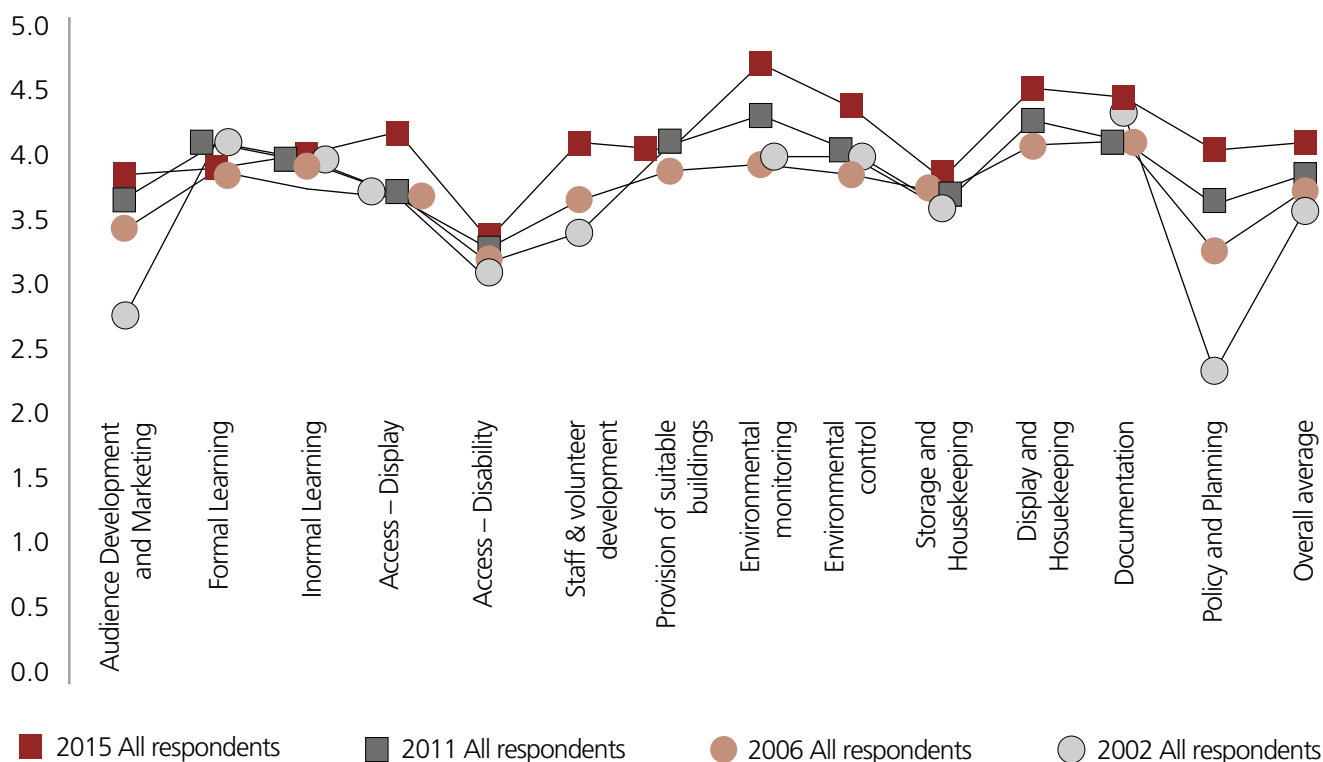


Figure 2.6.1-2: Average levels of practice since 2002 across the core group

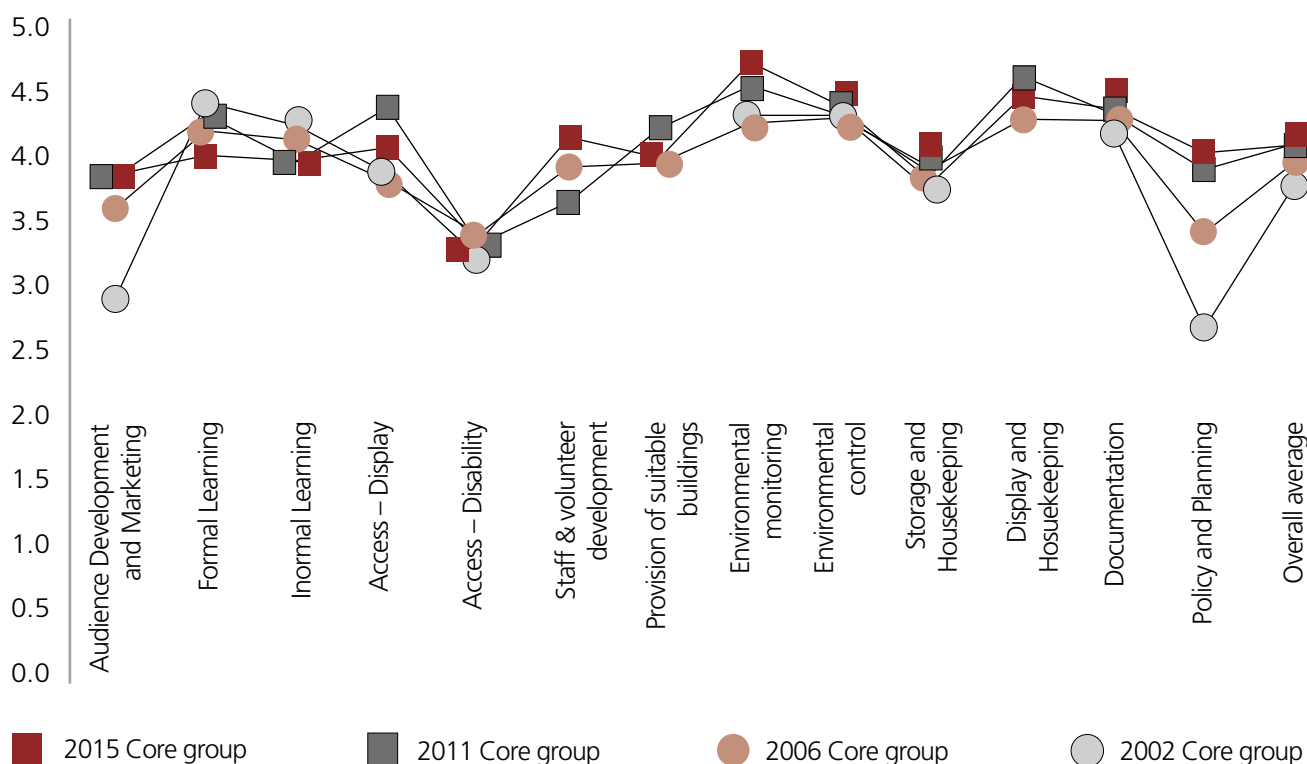


Figure 2.6.1-3: Changes to service levels between 2002 and 2015

Range Statement	All museums % difference 2015-2011	All museums % difference 2015-2002	Core group % difference 2015-2011	Core group % difference 2015-2002
Audience Development and Marketing	0.05	0.41	0.01	0.34
Formal Learning	-0.05	-0.05	-0.07	-0.09
Informal Learning	0.02	0.01	0.00	-0.06
Access – Display	0.13	0.13	-0.07	0.05
Access – Disability	0.06	0.10	0.00	0.03
Staff & Volunteer Development	0.21	N/A	0.14	N/A
Provision of Suitable Buildings	-0.01	N/A	-0.06	N/A
Environmental Monitoring	0.09	0.18	0.04	0.10
Environmental Control	0.09	0.10	0.02	0.02
Storage and Housekeeping	0.06	0.07	-0.02	0.02
Display and Housekeeping	0.06	N/A	-0.03	N/A
Documentation	0.08	0.03	0.01	0.04
Policy and Planning	0.12	0.76	0.03	0.52
Overall average	0.07	0.15	0.00	0.08

Figure 2.6.1-4: Number of museums which meet or exceed average levels of service

All museums 2015	Audience Development/ Marketing	Formal Learning	Informal Learning	Access – Display	Access – Disability	Staff & Volunteer Development	Provision of Suitable Buildings	Environmental Monitoring	Environmental Control	Storage and Housekeeping	Display and Housekeeping	Documentation	Policy and Planning
2015 Wales average	3.78	3.83	3.94	4.11	3.28	4.03	3.97	4.64	4.30	3.75	4.45	4.38	3.97
Number of responses	78	78	77	75	76	73	73	74	74	72	73	74	72
Number of museums at level 3 or above	70	62	68	63	47	60	70	71	71	60	66	73	66
Number of museums at level 4 or above	40	39	50	51	32	52	45	62	57	37	57	59	45

Figure 2.6.1-5: Average levels of service by size of museum

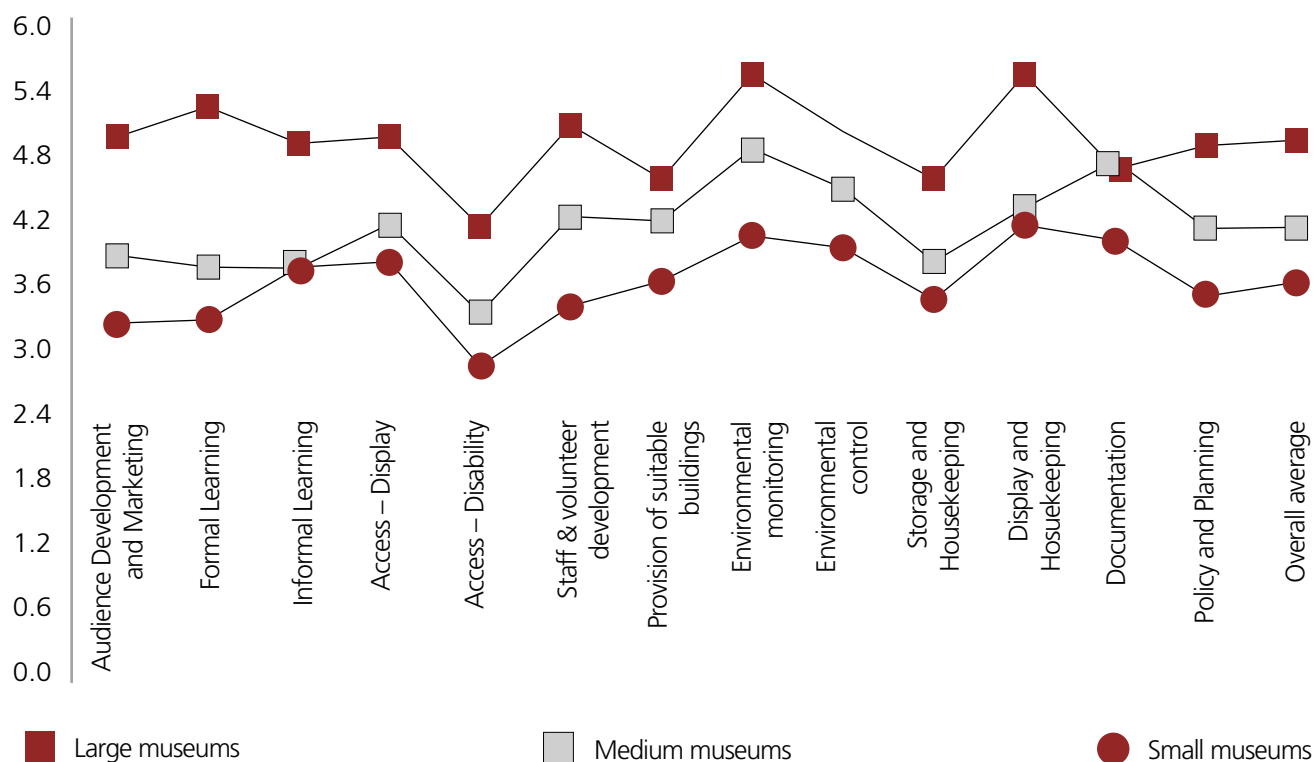
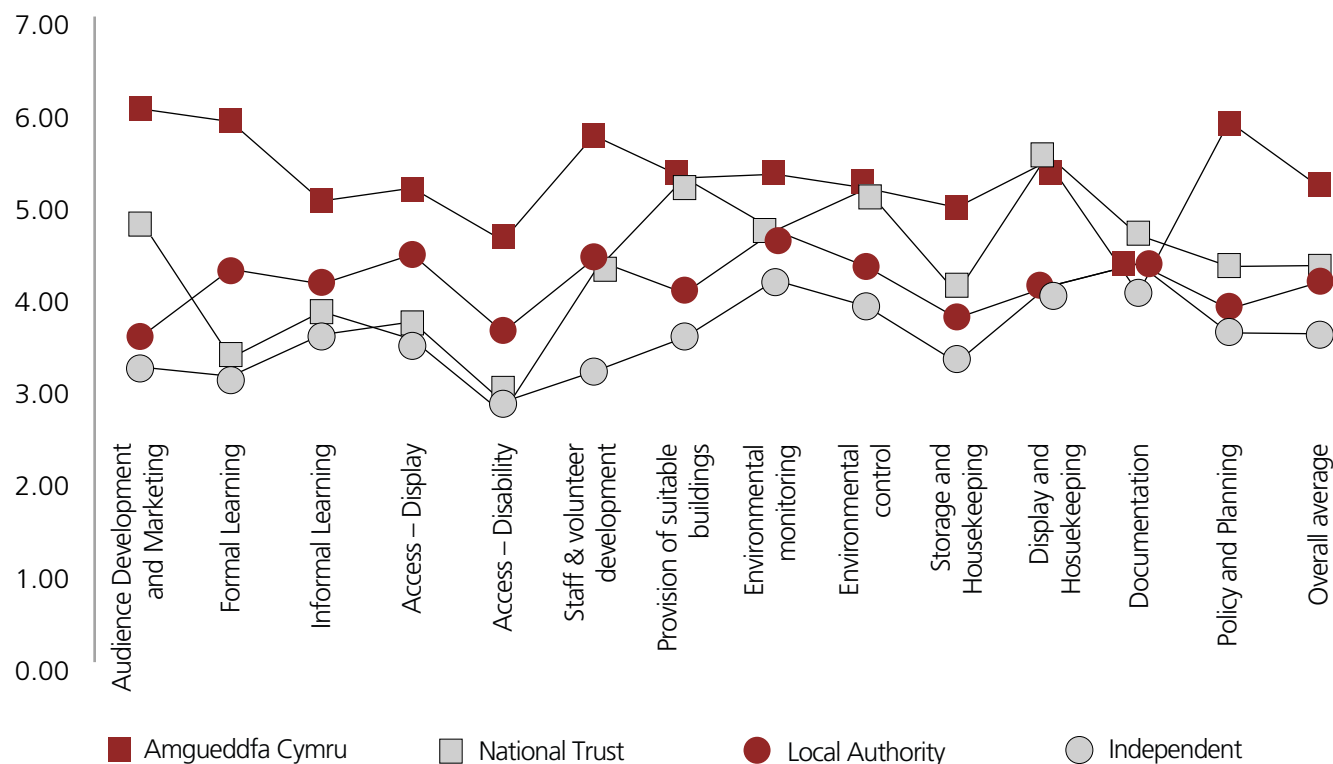


Figure 2.6.1-6: Average levels of service by type of museum



2.7 Challenge and success since 2011

Museums were invited to state what they felt were their main achievements since 2011 and what they felt their future challenges might be. 'In The Spotlight' studies throughout the report are based on these responses.

Challenges

Funding, budgets and possible cuts remain the main areas of concern for all museums as they were in 2011, followed closely by maintaining services with fewer staff. Recruiting and retaining volunteers was highlighted by a number of mainly independent museums as a key challenge in ensuring sustainability. A number of museums highlighted the challenges of making the transition from a local authority run museum to a charitable trust, particularly in relation to the anticipation of further cuts in local authority funding. Maintaining and growing visitor numbers was also identified as a key challenge.

Successes

All types of museums cited exhibitions more than any other activity amongst their successes, with many referring to the Welsh Government's Sharing Treasures partnership scheme⁸. Exhibitions often unlock opportunities for funding and partnerships with communities and other organisations and these were highlighted by museums as some of the key outcomes of their exhibition programmes.

Engaging with audiences and communities was an important theme for nearly all museums. This ranged from simply increasing visit numbers and holding public events to developing new community learning programmes and co-curated exhibitions with young unemployed people.

Museums highlighted achieving full Accreditation status as a key success. Accreditation provides recognition for museums which are committed to collections care and management, organisational resilience through forward planning, responding to user needs and actively working to reach new audiences.

Introducing, developing, or simply having a strong volunteering base were a common feature, both the Egypt Centre, Swansea and Pontypool Museum received national awards for their volunteering programmes.

Narberth Museum was a finalist in the Art Fund Museum of the Year Award in 2013 while Tenby Museum and Art Gallery was long listed for the Telegraph Family Friendly Museum of the Year Award in 2014. In 2015, the Winding House, New Tredegar received a Family Friendly Museum Special Commendation for Outstanding Contribution to their Local Community – the first time any museum has received such a commendation. This was in recognition of the testimonies local families gave to their museum, saying how much it meant to them. Further successes are highlighted in the 'In the Spotlight' sections throughout the report.

⁸ For further information about the Sharing Treasures scheme see: www.gov.wales/topics/cultureandsport/museums-archives-libraries/funding/sharing-treasures-review/?lang=en

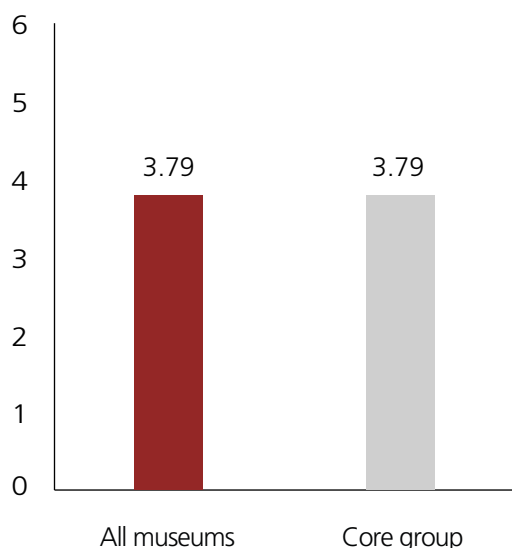
3. Museums for Everyone

Museums need to be accessible, welcoming organisations which understand their users and are able to provide for the needs of different users. Reducing barriers to access, working with communities, providing for tourists, creating learning and volunteering opportunities and being an active part of Wales' cultural offer are all key aspects of ensuring our museums are relevant and engaging for everyone.

Spotlight considered the following issues that were raised in 'A Museums Strategy for Wales':

- Use of the 'Inspiring Learning for All' framework⁹.
- Existence of access audits.
- Levels of volunteering.
- Levels of community involvement.
- Levels of provision for young people.

Figure 3: Average overall service levels for museum users: Audience Development & Marketing; Access – Display; Formal Learning; Informal Learning; Access – Disability



3.1 Visits to museums

The number of in-person visits is one of the main indicators of the popularity, and in many ways, the success of museums. The importance of visits to museums is however relative to the size and scope of any particular museum.

Museums are an important part of the tourism offer in Wales. Research undertaken by Strategic Marketing for the Welsh Government in 2013 highlighted that museums were among the top 10 reasons for visiting Wales by UK staying visitors and third most cited reason for UK day visitors and overseas visitors¹⁰.

- The analysis of visit numbers uses two sets of figures. Averages are based on all responses received, but totals are based only on museums which supplied visit numbers for all of the years 2011-2014.
- Total visits to museums which provided numbers for this period fell by 3.3%, to 3.75 million in 2014. Visits to the core group of Spotlight respondents fell by 3.9% over 2011 to 2014.
- A small number of museums did not provide data for all years. Including their data for 2014 there were 3.8 million visits to museums in Wales.
- This overall result disguises some significant variations between different types of museum.
- Visits to local museums (non-national and non-National Trust) actually increased by 1.3% to 1.53 million. Visits to Amgueddfa Cymru fell by 3.4% to 1.67 million while visits to National Trust properties fell by 13.3% between 2011 and 2014.
- These figures show a complex picture, highlighting in particular that visit numbers do not always increase year on year and fluctuations are normal. While visit figures have fallen over 2011-2014, based on museums that provided total visit figures

⁹ Inspiring Learning, An improvement framework for museums, libraries and archives www.inspiringlearning.com/index.html

¹⁰ Wales Visitor Survey 2013: www.gov.wales/statistics-and-research/wales-visitor-survey/?tab=previous&lang=en

for every year during 2006-2014. Total visit figures over the nine year period actually rose by 3.1%, highlighting the importance of taking a long term view of visit figure trends.

- Museums with higher visit figures tended to deliver higher levels of service. This pattern was consistent across all range statements. This is perhaps unsurprising given that museums with greater visitor numbers are likely to have greater levels of staffing and resources.

For the first time in a Spotlight survey, museums were asked to provide a breakdown of the numbers of adult and child visits (under 16).

- Although only 30 museums provided a breakdown of adult and child visits for all years over the period 2011-2014 the data can still provide some useful insight. For instance on average children accounted for 21% of total visits to museums during this period.

Museums were also asked to state whether the visit figures they provided were actuals or estimated.

- There were 52 museums that provided actual figures for total visits for all years 2011-2014 and only 10 museums that provided just estimates. Where museums did not specify, it has been assumed that they provided estimates.
- In contrast, only 18 museums were able to provide an actual breakdown between adult and child (under 16) visits for all years 2011-2014. Whilst it is recognised that this can be challenging, as it depends on the museum's approach to counting visitors, museums need to understand who their users are.

Museums were asked to provide details on their normal opening hours.

- 63% (49) of respondents were open all year.
- 33% (26) of respondents close for part of the year as part of a regular seasonal closure.
- 2 museums were closed for part of the year for reasons such as repairs or redevelopment.
- 1 museum was open by appointment only all year round.

In the Spotlight

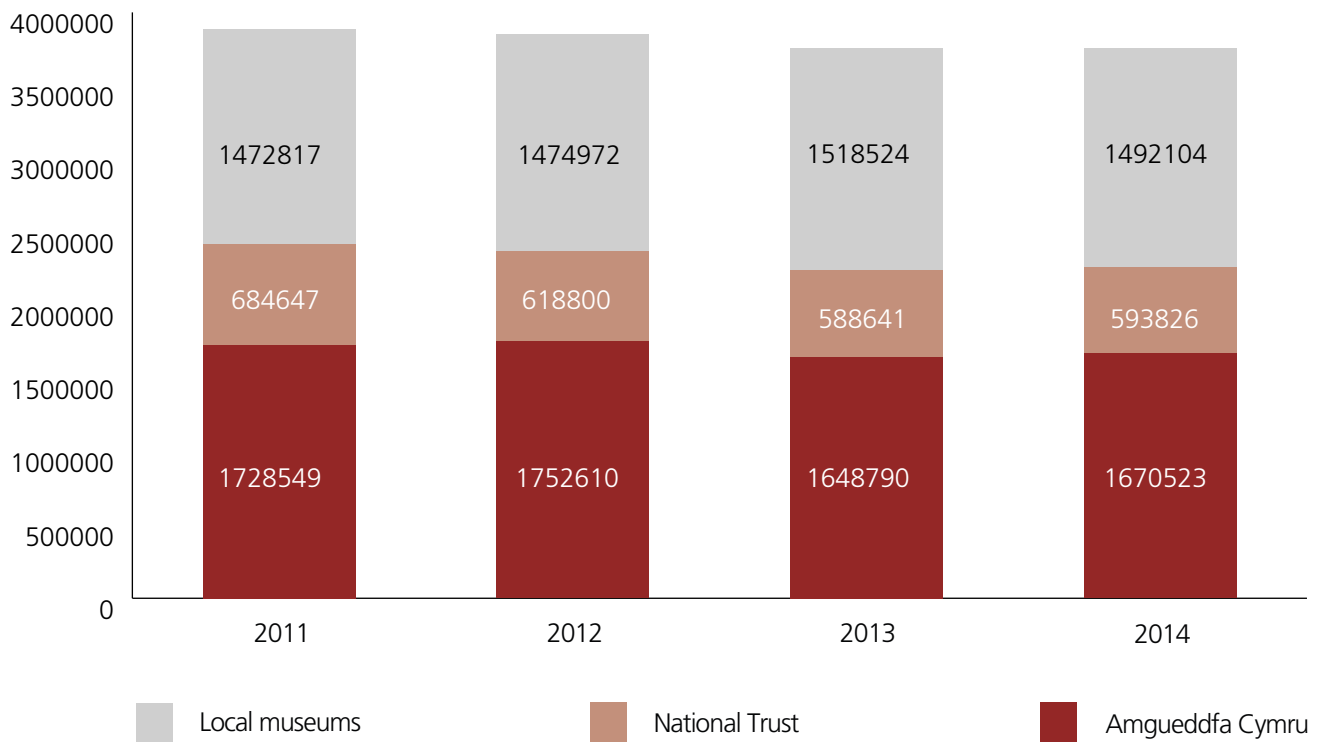
Llyn Cerrig Bach collection at Oriol Ynys Môn

In the summer of 2012 many objects from the Llyn Cerrig Bach collection, including the finest, were exhibited at Oriol Ynys Môn. It proved to be a rewarding and successful partnership between Anglesey County Council and Amgueddfa Cymru – National Museum Wales. This collaboration contributed in enhancing the reputation of the National Museum as borrowers of national collections as well as extending the reputation of Oriol Ynys Môn beyond Wales as a venue able to loan significant works from other UK institutions.



© Llyn Cerrig Bach collection at Oriol Ynys Môn

Figure 3.1.1: Total visits to all museums which supplied figures for all years 2011-2014



The following charts show total visits to museums by type that supplied figures for all years 2011-2014.

Figure 3.1.2: Amgueddfa Cymru (7 museums) – Overall change 2011 – 2014 -3.4%

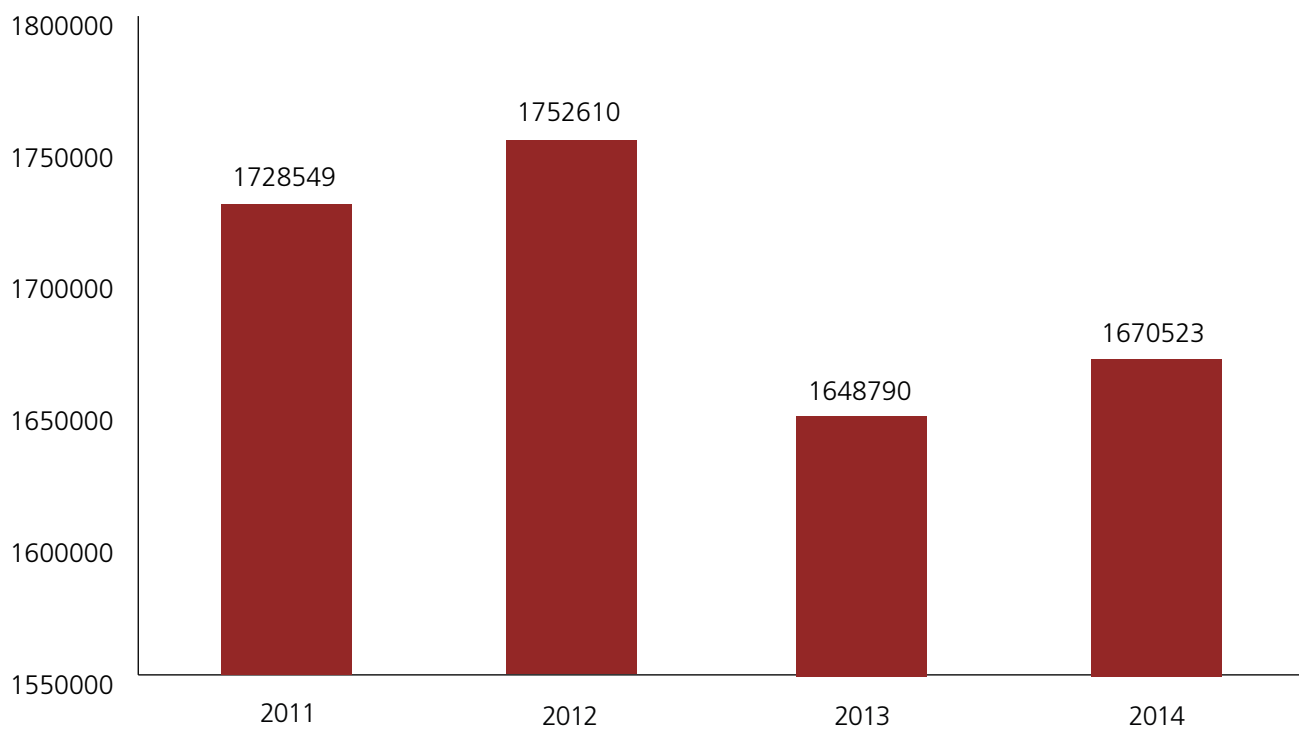


Figure 3.1.3: National Trust museums (10 museums) – Overall change 2011-2014 -13.3%

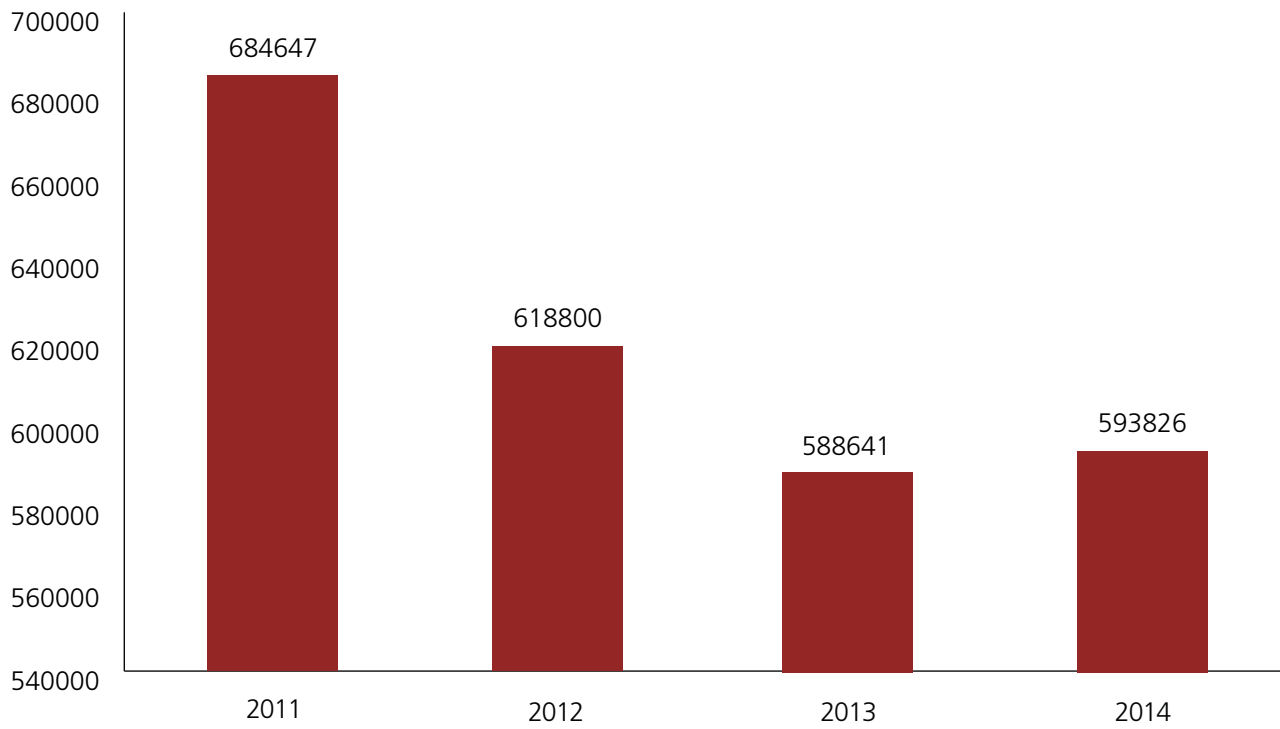


Figure 3.1.4: Local museums (54 museums) – Overall change 2011-2014 +1.3%

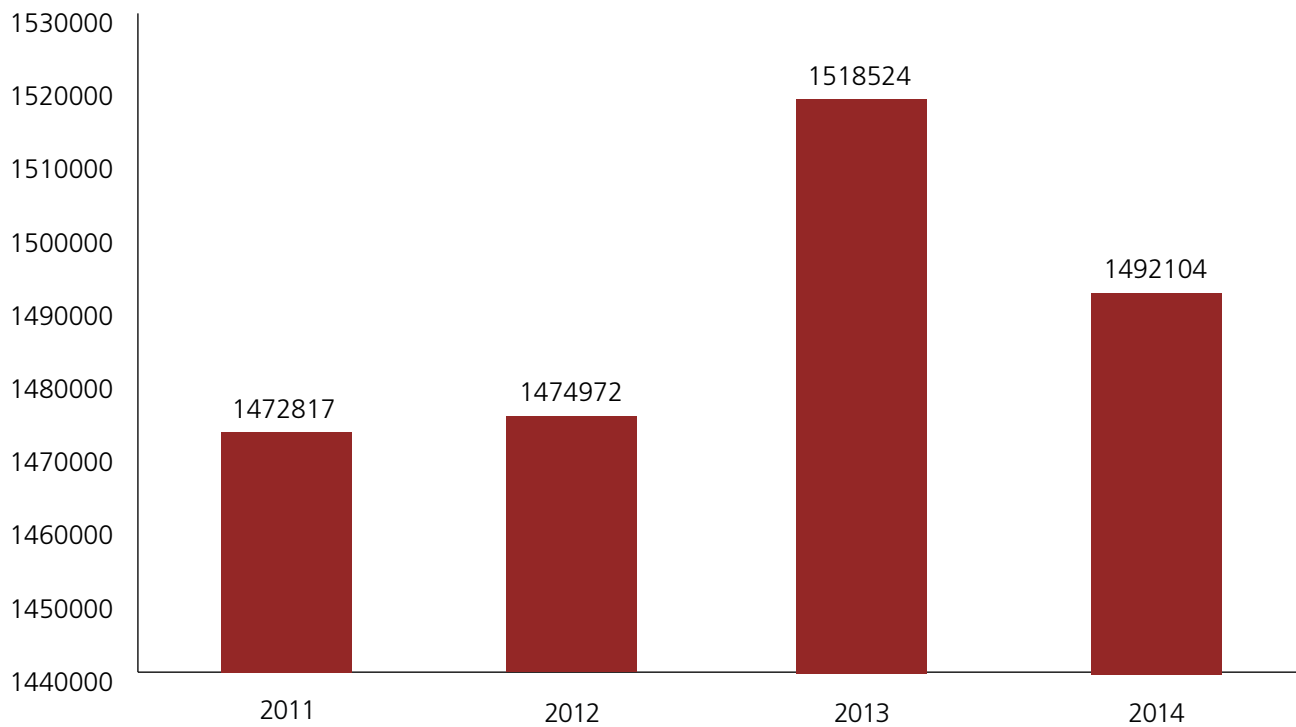


Figure 3.1.5: Total visits to all museums and core group which supplied visit figures for every year 2011-2014

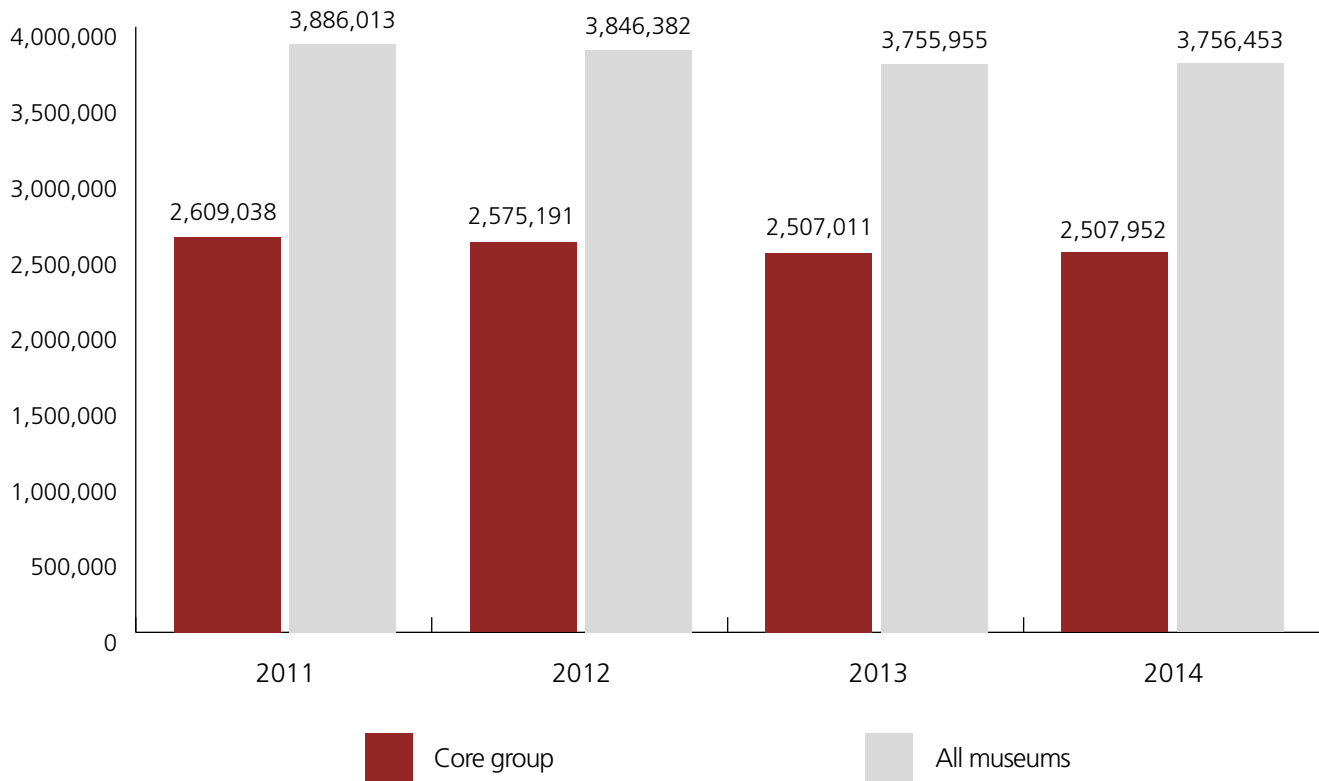


Figure 3.1.6: Total visits to museums since 2006

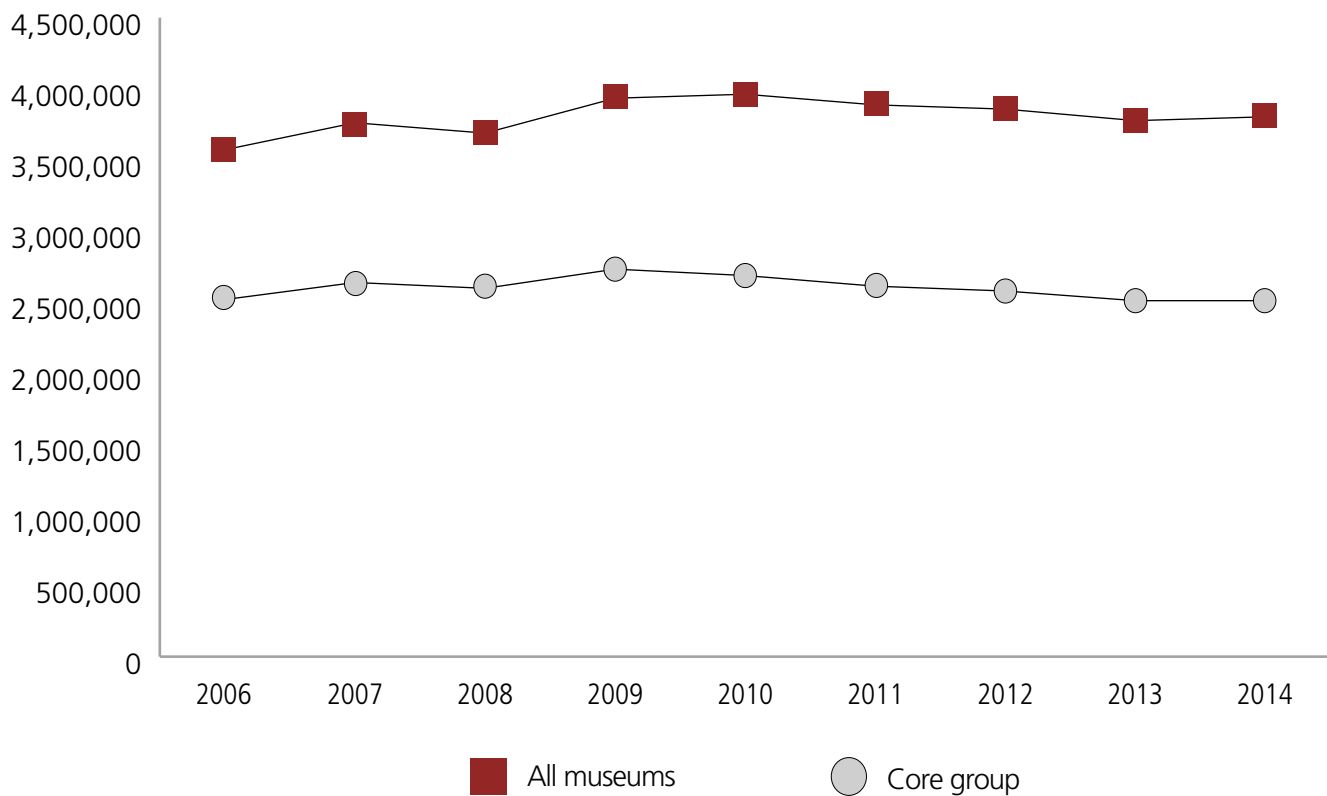


Figure 3.1.7: Average visits by type of museum which provided data for all years 2011-2014

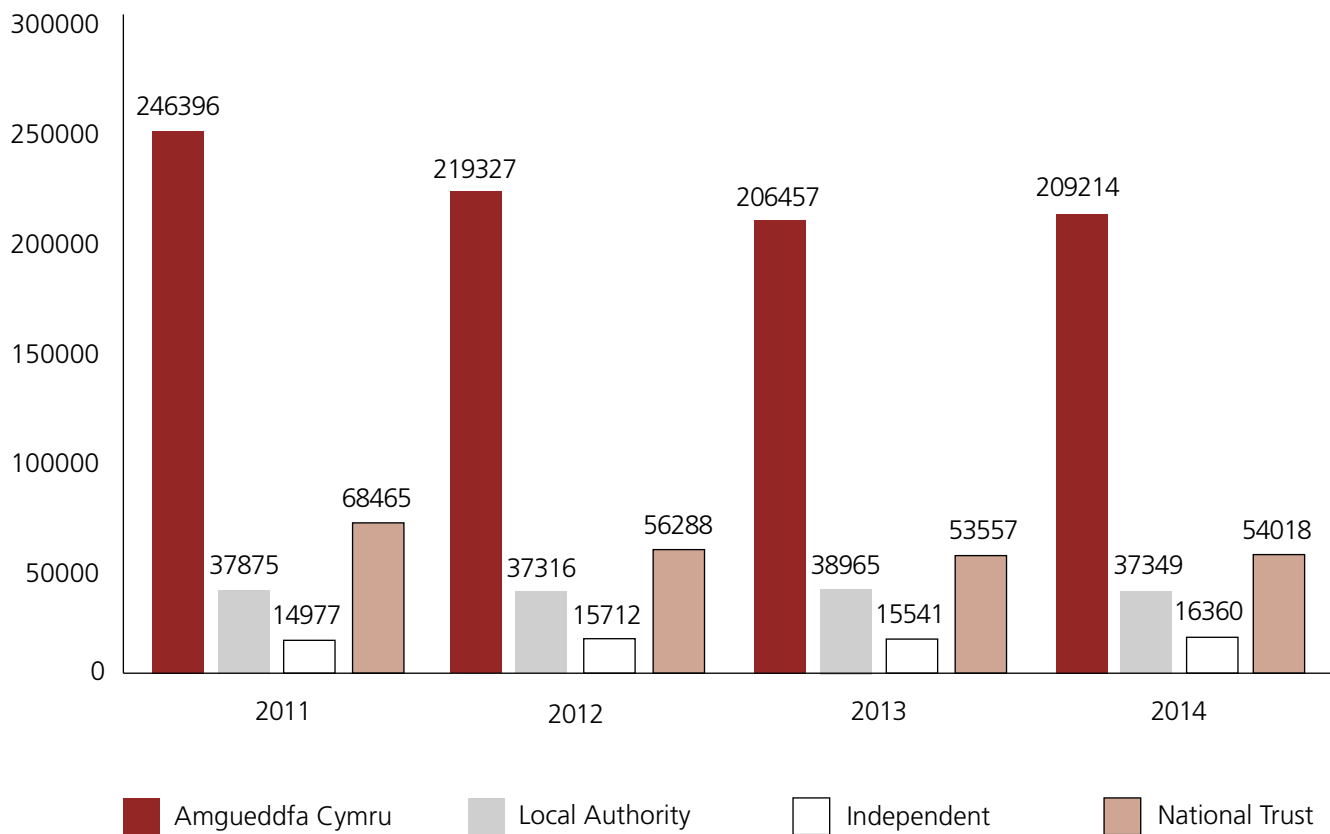


Figure 3.1.8: Average visits by size of museum which provided data for all years 2011-2014

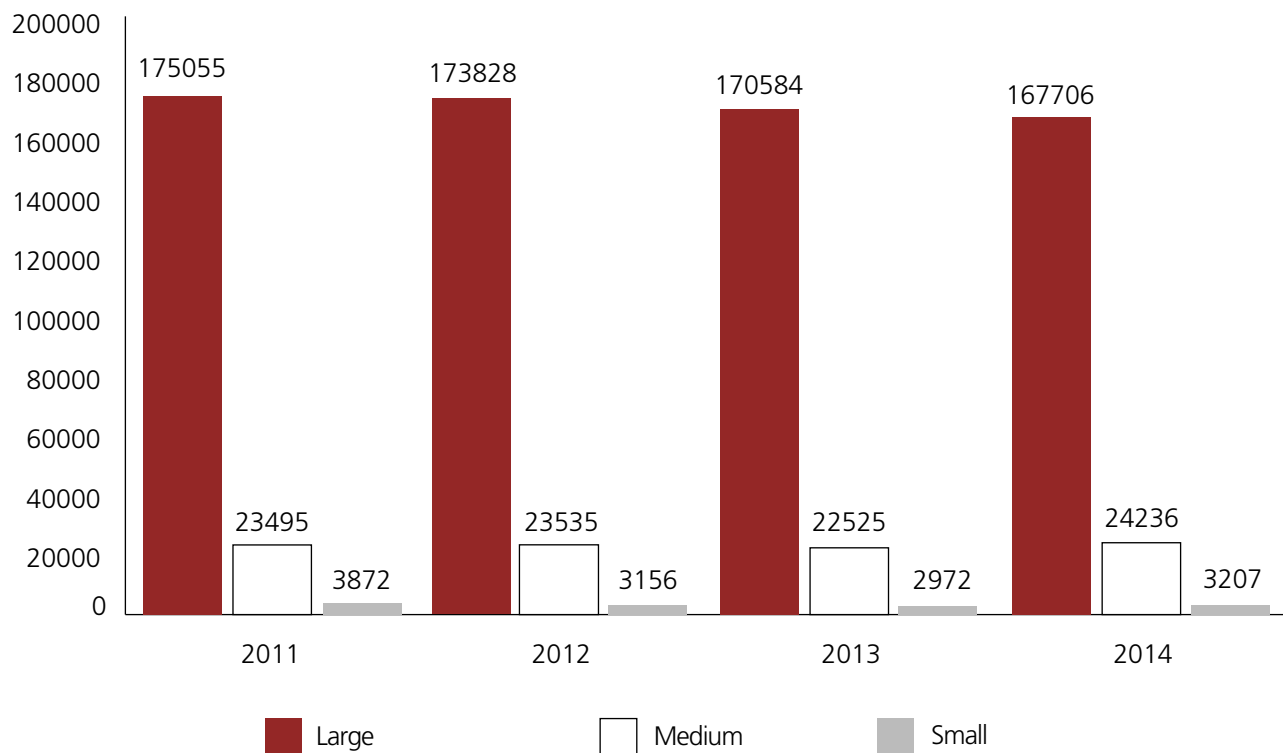
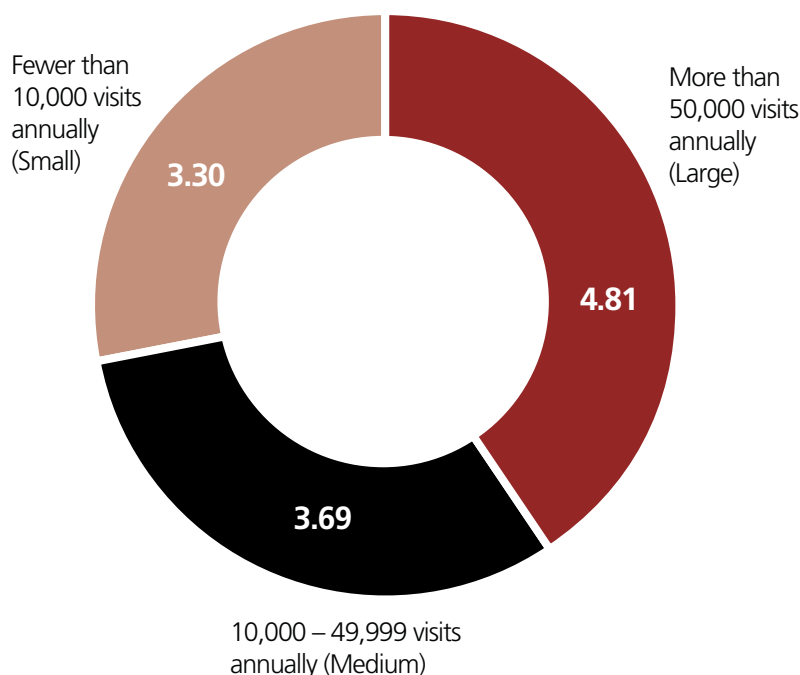


Figure 3.1.9: Levels of service for users by size of museum



3.2 Economic impact of visits to museums

Museums can make important contributions to the economy helping to attract tourists and driving visitor spend. This visitor spend has wider benefits to other businesses such as cafes, restaurants, accommodation providers as well as other visitor attractions.

- The Association of Independent Museums has published an Economic Impact Toolkit which was developed by consultants DC Research to help museums express the gross impact of visits to their museum in terms of economic value¹¹. This toolkit can be used by individual museums but can also help provide an idea of this economic value at an aggregate level.
- The calculation is relatively straightforward taking the number of adult visits to a museum, establishing the proportion of local, day and overnight visits and multiplying these by average visitor spend assumptions. Spend assumptions have been developed by DC research from regional and national tourism volume and value datasets which were updated in 2014¹².

- Using the visitor data provided by museums it is possible to calculate gross economic value of visits to museums in Wales at £82,780,467 in 2014.
- This figure was calculated as follows:
 - Establish total adult visits to museums in 2014 (3,003,604 based on the adult/child ratio of 79/21); use estimates for proportion of local, day and overnight visits provided by DC Research based on the size of museums; multiply these by visitor spend assumptions for Wales.
 - Actual ratios for local, day and overnight visits were not available from museums so the average ratios provided by DC Research were used. No data or average estimates for overnight visits were available so visits have been divided into local and day visits only. This means that the overall economic value of visits is likely to be a conservative estimate given the higher levels of visitor spend associated with overnight visits.

¹¹ www.aim-museums.co.uk/content/research_papers/

¹² www.aim-museums.co.uk/downloads/f6e017ac-8f11-11e3-8be4-001999b209eb.pdf

Figure 3.2.1: Estimated ratio of local visits to day visits by size of museum¹³

	Local visits	Day visits
Small museums	47	53
Medium museums	44	56
Large museums	31	69

Figure 3.2.2: Regional visitor spend assumptions¹⁴

Welsh Region	Average spend (local visitor)	Average spend (day visitor)
South East	£15.30	£30.61
South West	£22.49	£44.98
Mid	£18.96	£37.92
North	£14.39	£28.78

Figure 3.2.3: Economic impact of visits to museum in Wales 2014¹⁵

Welsh Region	Adult visits to small museums	Value of visits	Adult visits to medium museums	Value of visits	Adult visits to large museums	Value of visits	Total value of visits
South East	6,739	£157,789	137,876	£3,291,596	1,387,901	£35,896,533	£39,345,918
South West	32,497	£1,118,212	198,448	£6,962,429	328,333	£12,479,314	£20,559,955
Mid	15,505	£449,781	42,411	£1,254,416	98,958	£3,170,852	£4,875,049
North	30,197	£664,838	155,153	£3,482,937	569,584	£13,851,770	£17,999,545
Total		£2,390,620		£14,991,378		£65,398,469	£82,780,467

3.3 Online engagement

The rapid advances in digital technology in recent years offer museums great potential for new forms of engagement beyond the physical visit. Spotlight 2015 asked museums about their online and social media presence.

- 97% of museums have a website based on the responses to this survey. This has increased from 86% reported in the Spotlight 2011 report. Museum websites serve many different audiences from tourism to education and their content can range from basic visitor information to in depth research and entire collections being made available online.

- An online presence is increasingly important in engaging with audiences and can be critical in providing 'discovery' information for current and potential users.
- The Welsh Government's 'Visitor Information Needs Survey 2013' found that websites were increasingly being used to inform planning¹⁶:
 - 52% of overseas visitors used a website for information prior to their trip;
 - 45% of UK staying visitors used a website for information prior to their trip;
 - 17% of day visitors used a website for information prior to their trip;

¹³ www.aim-museums.co.uk/downloads/f6e017ac-8f11-11e3-8be4-001999b209eb.pdf, p.2, op cit

¹⁴ www.aim-museums.co.uk/downloads/f6e017ac-8f11-11e3-8be4-001999b209eb.pdf, p.5, op cit

¹⁵ Please note that as these figures are rounded to the nearest whole number, total visit numbers given within this table may not be equal to total visits overall

¹⁶ Visitor Information Needs survey 2013 – www.gov.wales/docs/caecd/research/130901-visitor-information-needs-2013-en.pdf

- In total, museum websites received 3,871,624 unique visitors in 2013/14, highlighting the importance of websites in supporting engagement with museums.
- Museums were also asked if they use social media to engage with audiences. 91% (71) of respondents said they did, which is a significant increase on the 45 museums saying they used social media in the previous Spotlight survey. In total, museums had 236,293 followers across all social media platforms. The most popular social media platforms were Facebook and Twitter. The survey asked for data for 2013/14, however a number of museums could not access historical data so provided data that was correct at the time of completing the survey so these figures should be treated as a guide.

Figure 3.3.1: Average number of website visitors by museum size in 2013/14

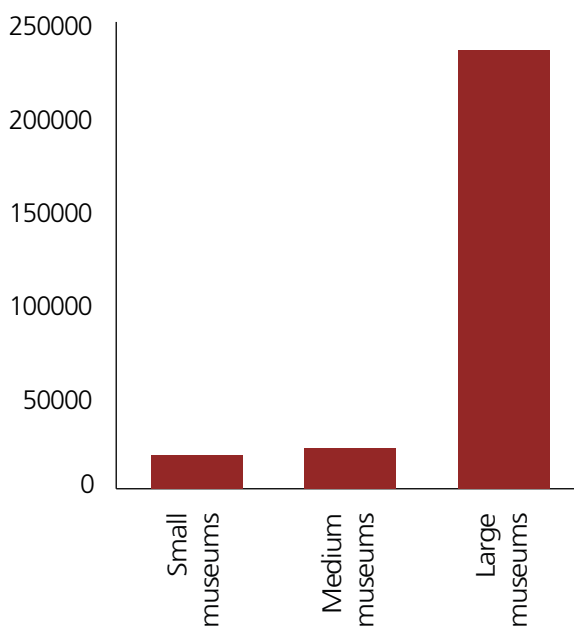
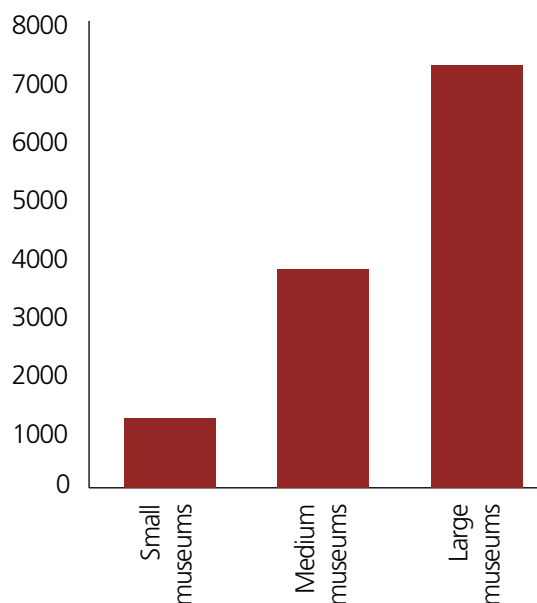


Figure 3.3.2: Average number of social media subscribers in 2013/14



3.4 Museums and learning

Learning and education are important functions of all museums. ‘Advancement of Education’ is one of the main purposes of museums established as charities¹⁷. Spotlight 2015 explored the quantity and quality of both formal and informal learning provision through numerical data and Range statements.

- Museums were asked to provide data on the number of sessions and participants in both formal and informal learning activities in 2013/14. In total, museums provided 11,597 learning sessions and engaged 625,578 participants. Comparative data is not available from the previous Spotlight survey as only the number of outreach sessions and partnerships with local communities was captured and the number of participants was not collected.
- ‘A Museums Strategy for Wales’ encourages museums to use the ‘Inspiring Learning for All’ (ILFA) framework to plan and evaluate learning¹⁸. Museums reaching level three or higher in the learning range statements are likely to have an understanding of, and use ILFA.

¹⁷ The Establishment and Maintenance of a Museum and/or Art Gallery’, Charity Commission www.charity-commission.gov.uk/Start_up_a_charity/default.aspx

¹⁸ A Museums Strategy for Wales, Welsh Assembly Government, 2010 p.15, 3.4.2, op cit

- 79% of museums reach level three or higher for formal learning and 88% for informal learning. This is an interesting reversal of the previous Spotlight survey where 81% of museums did so for formal learning while only 75% did so for informal learning. This change could potentially be explained by the way responders have defined their museum's learning offer.
- The previous Spotlight survey identified a fall in the number of museums in the core group responding to the learning range statement at level three or above. For formal learning this has continued to fall, dropping from 86% to 79%. However, for informal learning it has risen from 78% to 86%. This fall could be explained by a reduction in the number of

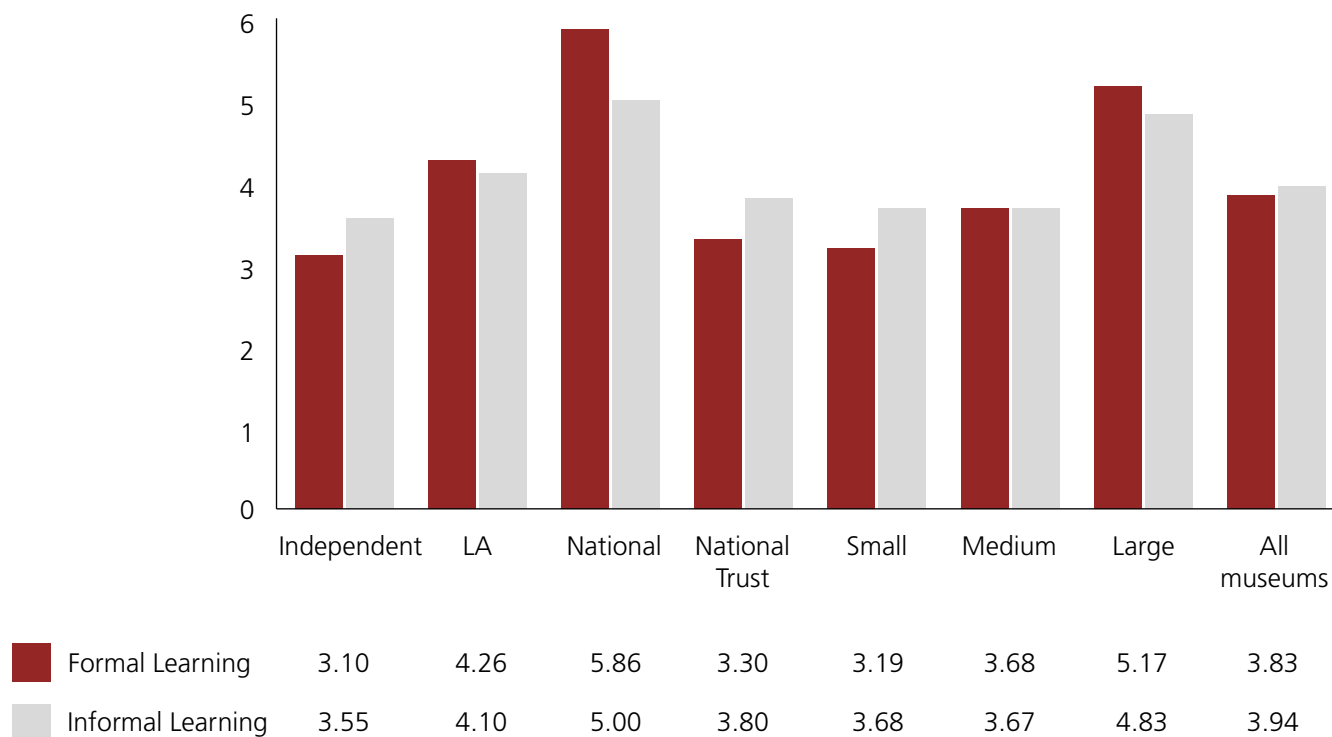
qualified staff able to provide formal learning opportunities highlighted by changes in the workforce shown in Figure 5.4.1.

In the Spotlight

Joseph Parry's Ironworker's Cottage

In 2013, education staff from Cyfarthfa Castle worked in partnership with Brecon Road Infants School, Merthyr Tydfil to submit an entry to the Welsh Heritage Schools Initiative (WHSI). The project resulted in pupils providing costumed guided tours of the museum, with over 120 people attending the event. The project won first prize in the WHSI's 'Infant School' category.

Figure 3.4: Average service levels of learning provision by type and size of museum



3.5 Museums and local communities

- Learning opportunities are not just provided inside museums. Outreach work is an important part of the learning offer from many museums and an important way of involving local communities which might not use the museum building. Across both formal and informal learning opportunities, museums provided 2,419 sessions and

engaged 124,992 participants in learning activities outside of the museum.

3.6 Museums and equalities

- Museums have an important role in supporting equality in society and this should be reflected throughout their audiences, collections and their organisation and workforce as a whole. The importance of equality is something that features

prominently in the recently updated Code of Ethics for Museums published by the Museums Association in November 2015¹⁹.

- Museums can address equalities in a variety of different ways but one of the most visible is through the exhibitions, events or activities they programme.
- 80% of museums ran exhibitions, events or activities that specifically addressed at least one area of equalities in the last two years. This compares to only 58% of museums that had done so at the time of previous Spotlight 2011 survey. The most common were in relation to age; 48% ran exhibitions, events or activities specifically targeted at young people (16-25) and 39% targeted at older people (60+). 31% ran exhibitions, events or activities targeted at Welsh speakers. These equality areas were also the most commonly provided for in 2011, while provision for the other equality areas has also remained relatively consistent.

In the Spotlight

Hidden Now Heard

In January 2015 the Hidden Now Heard exhibition launched at Swansea Museum. The exhibition tells the stories of patients, their relatives and staff of Hensol Hospital, a former institution for people with a learning disability.

The exhibition is part of Mencap Cymru's Hidden Now Heard project, which received a £292,000 grant from the Heritage Lottery Fund and an £18,000 grant from the Welsh Government. The three year project will focus on six long-stay hospitals like Hensol with exhibitions happening across six regional museums. It is the first pan-Wales project of its kind and will capture a hidden part of Wales' history from the hospitals which closed in 2006. Working in partnership with St Fagans National History Museum, a permanent exhibition will be created at St Fagans so that information about Wales' long-stay hospitals will be available and accessible to the public, creating better understanding of a previously underrepresented part of our society.

Figure 3.6.1: Provision for different equality areas by type of museum, Spotlight 2015

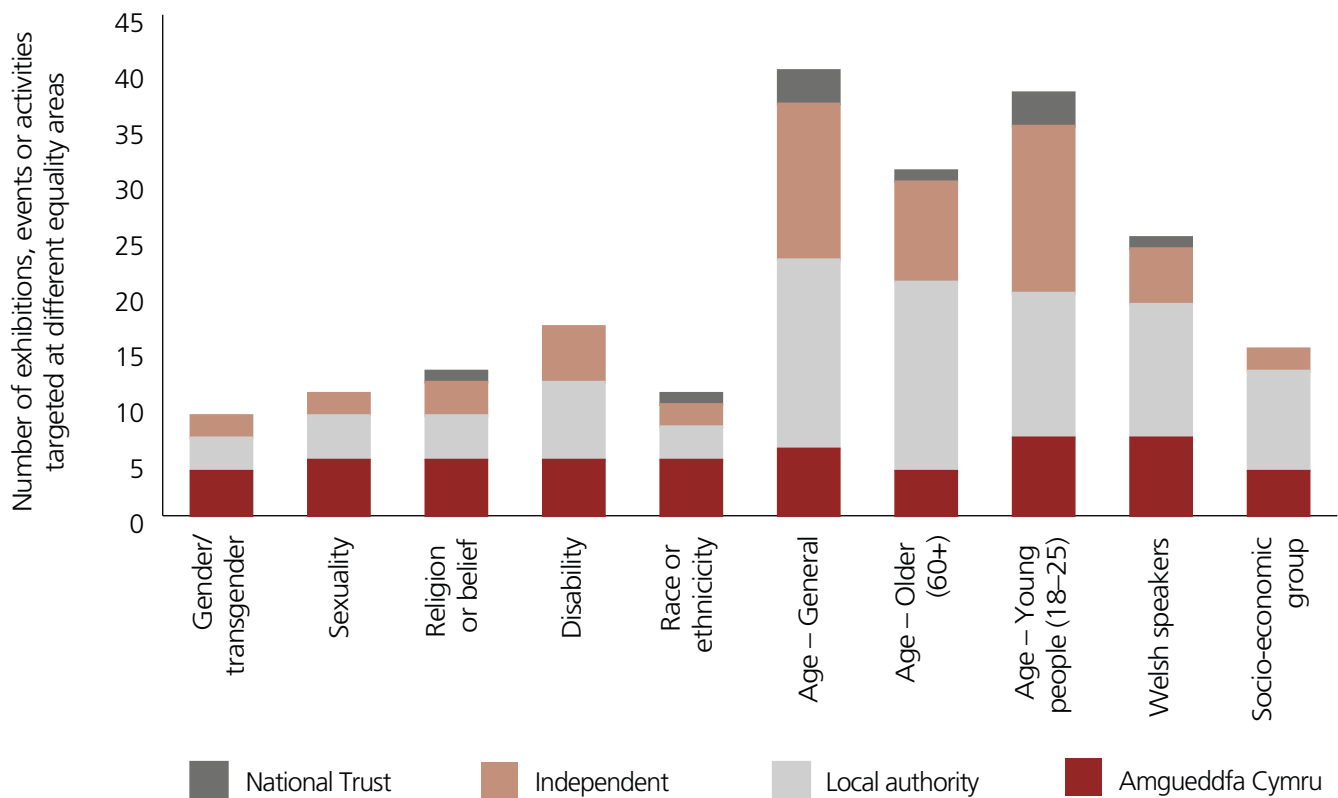
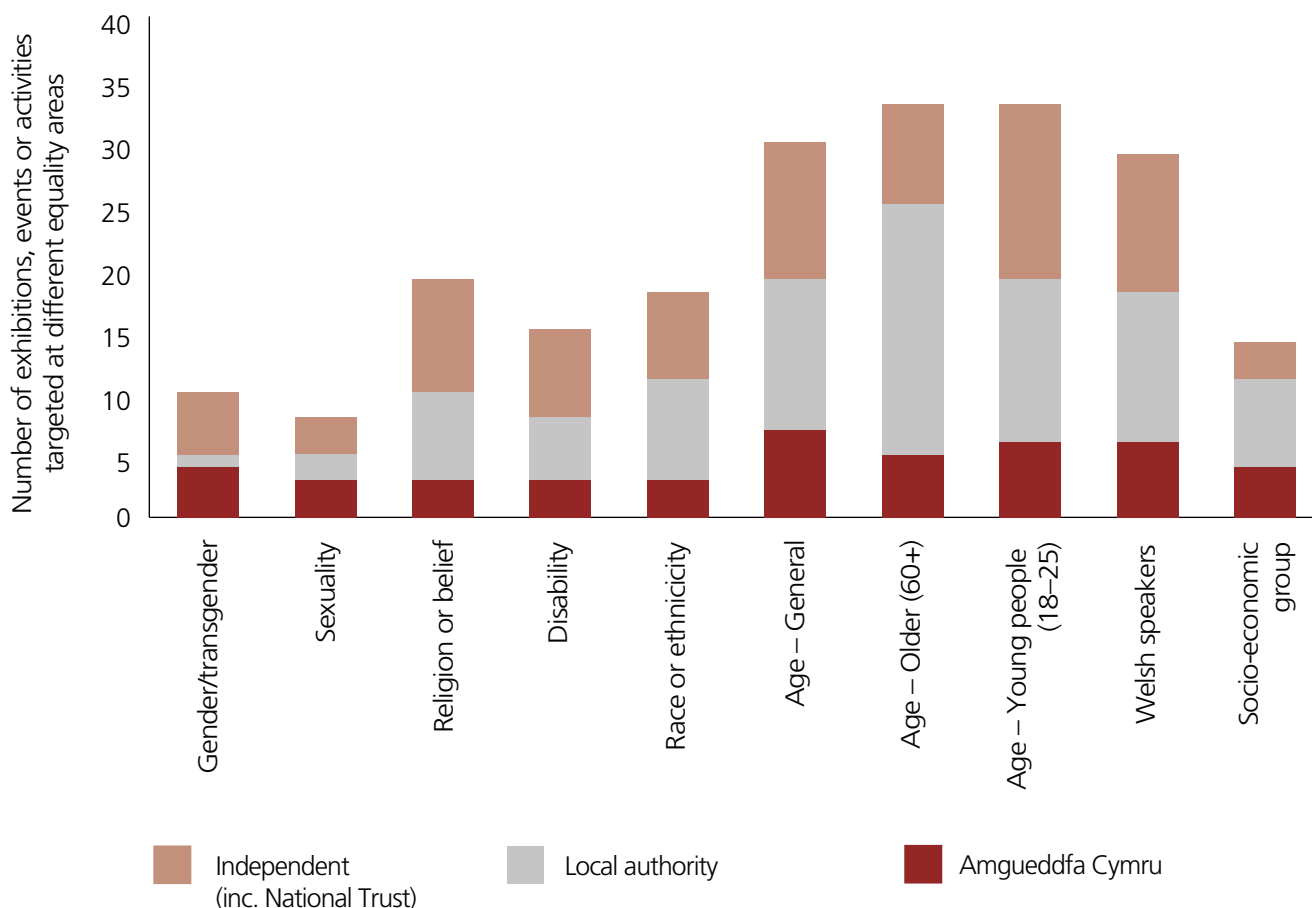


Figure 3.6.2 Provision for different equality areas by type of museum, Spotlight 2011

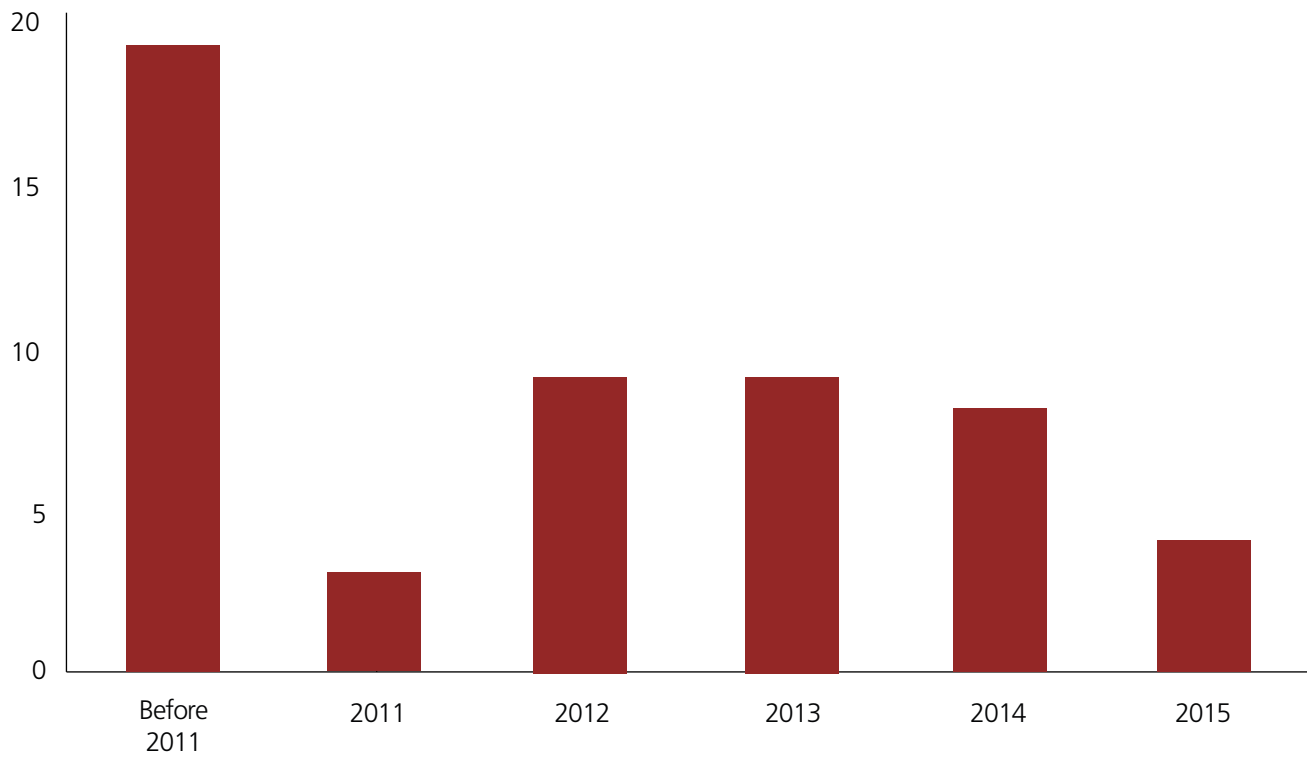


3.7 Museums and access audits

- The Museums Strategy for Wales encourages all museums to carry out full access audits on which to base and prioritise improvements. Having an access statement that addresses physical, intellectual, social, geographical and cultural access is also a requirement of the Accreditation standard and undertaking such work to address these should be built into forward planning.
- 67% (52) of museums that responded to the question had carried out a full access audit. The remaining respondents stated that they did not know when the last full access audit had been undertaken. This is a considerable increase on the 45% (47) that had undertaken a full access audit at the time of the previous Spotlight survey. This increase may be partly due to the high percentage of museums being within the Accreditation scheme and therefore more likely to have undertaken a full access audit.

- While the majority had undertaken full access audits, only 40% had undertaken one in the past three years, with some museums last undertaking a full audit back in 2005. This is an unexpected result, given the requirement within the Accreditation standard for museums to have 'conducted an assessment of access needs within the last five years'.

Figure 3.7: Year of museum's last full access audit



4. A Collection for the Nation

Collections of artefacts are a core purpose of museums. Spotlight 2015 asked questions about levels of care and management of collections as well as acquisitions and disposals and stored collections to provide a sense of how museums are addressing issues of sustainable collecting. The 'Museums Strategy for Wales' encourages active, sustainable management of collections and an indication of current trends is needed to enable monitoring of trends.

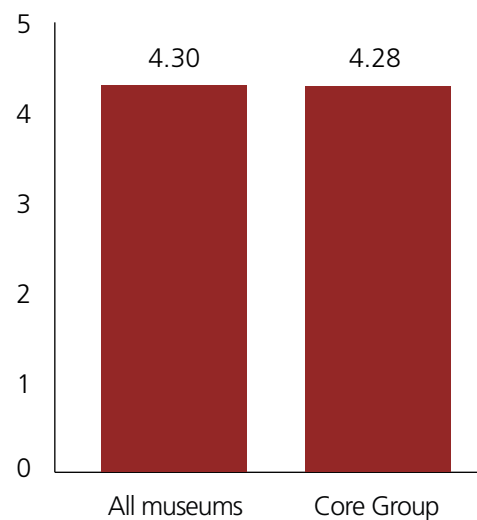
For Spotlight 2015 the decision was taken not to survey on the types and size of collections to reduce the volume of information requested from museums. This was partly in recognition of the fact that museum collection sizes and types tend to remain relatively static over short periods of time.

At the last count in the 2011 survey there were approximately 5.5 million items held by museums in Wales. The vast majority (4.5 million) were held by Amgueddfa Cymru, with slightly more than 1 million held by local museums and National Trust properties.

4.1 Levels of collections care and management

- Levels of collections care and management have remained relatively steady since the last Spotlight survey, with very little actual change in the average ratings for museums across the range statements.
- For museums that responded in 2015 and in 2011, the average levels of collections care and management remained at 4.3. The only changes of note were a slight fall in the rating for display and housekeeping which fell from an average of 4.56 to 4.41 amongst the core group of respondents.
- As in 2011, storage presents the greatest collections care challenge with levels falling from 3.81 down to 3.75 for both the core group and those that responded to both the 2015 and 2011 surveys. Levels of standards of storage were rated the second lowest of all the Range Statements in 2015.

Figure 4.1: Average levels of collections care and management: Environmental Monitoring; Environmental Control; Storage and Housekeeping; Display and Housekeeping; Documentation



4.2 Recent acquisitions and disposals

Museums were asked to report how many items they had acquired and disposed of in the past two years (2013 and 2014) by gift, purchase and in the case of disposal, by destruction.

- There has been a significant drop in the number of acquisitions in the last two years. In total, 12,984 items were acquired by museums either by purchase or gift in 2013 and 2014. By comparison, in the previous two years at the time of the last Spotlight survey (2009 and 2010) there were 249,597 acquisitions. While these numbers are not comparable given the significantly smaller sample size in 2015, the downward trend is equally present across the core group of museums which fell by 96% from 240,933 to 9,921. It should also be noted that changes in the number of acquisitions do not necessarily reflect changes in the level of acquisitions activity or in the significance of acquisitions.

- The number of items leaving museum collections was also low. 89% of museums that responded to the question said that no items had been sold or destroyed. Only two

museums identified items as having been sold while six museums identified items that had been destroyed. The survey did not explore the motivations behind these disposals.

In the Spotlight

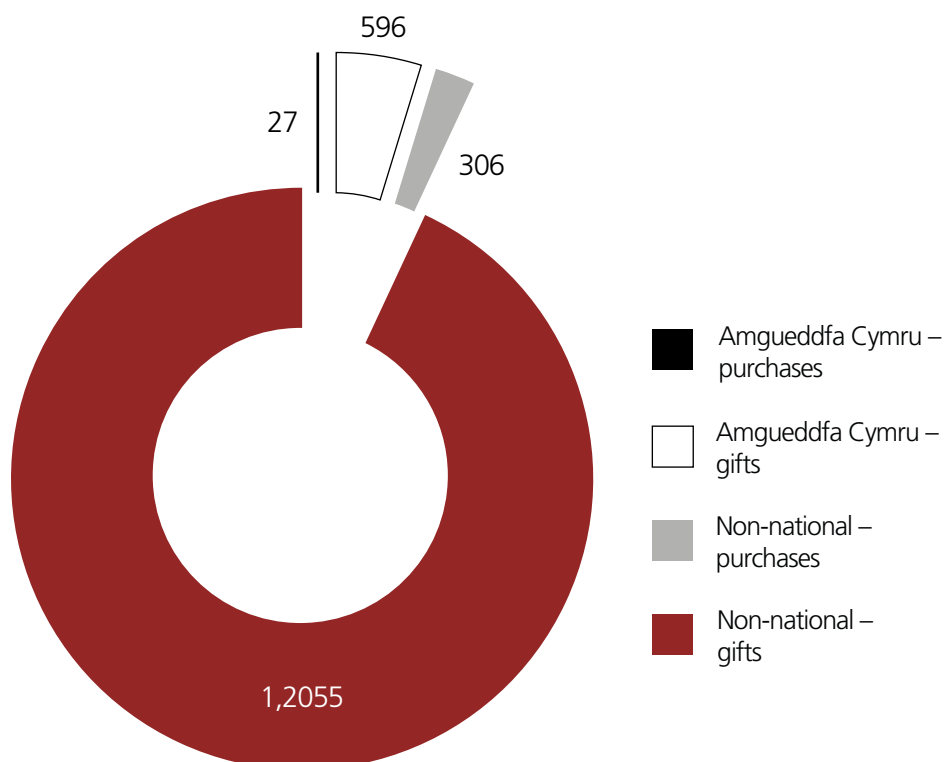
Wrexham Museum Mold Cape

In 2013, Wrexham Museum borrowed the Gold Mold Cape from the British Museum as part of their Capes, Beads & Burials – The Mold Cape: A New Perspective exhibition. The Mold Cape, a ceremonial Bronze Age gold cape discovered in Flintshire 180 years ago and one of the British Museums’ most prized artefacts attracted over 16,500 visitors over 6 weeks.



Copyright Anglesey County Council

Figure 4.2: Total acquisitions by museums in 2013 and 2014



4.3 Storage

As the response to the storage and housekeeping range statement suggests, appropriate storage poses a major challenge to many museums.

- In 2006, 42% of museums said their stores were already full, and a further 25% said they would be full by 2011. In 2011, 41% reported their stores were already full, and 25% would be full by 2016.
- The results from Spotlight 2015 continue to follow this trend with 49% of the 67 museums that responded to the question stating their stores are already overcrowded. This represents increase of 8%.
- The previous Spotlight report highlighted a link between museums achieving levels four to six in the policy and planning range statement and those same museums being less likely to have overcrowded stores. The results of the 2015 survey suggest that this is no longer the case with museums reporting their stores were either full or would be in 5 years more or less even across all levels achieved for policy and planning, suggesting the problem over overcrowding is now a universal issue.

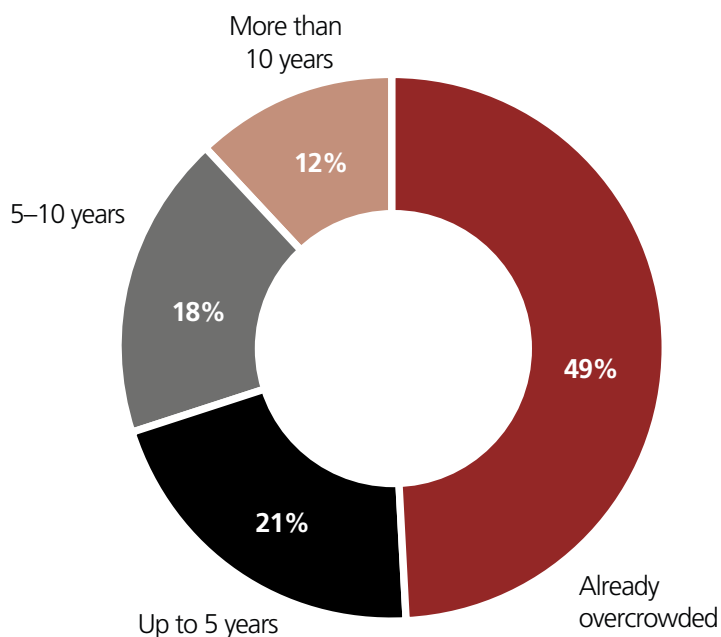
In the Spotlight

In 2011/12 Newport Museum and Art Gallery was supported by the Museums, Archives and Libraries Division through a Welsh Government Innovation & Development grant to undertake a storage rationalisation project. More than 1,200 framed works on paper were removed from their frames and boxed; this has improved storage conditions and freed up hanging space for paintings. The museum also received an Innovation & Development grant in 2014 to digitise watercolour paintings in their collection. More than 2,000 works were digitised and half of those were uploaded to the People's Collection Wales website.



Unknown artist, Newport Castle after a watercolour drawing by JMW Turner, c.1800

Figure 4.3 Time estimated for stores to become overcrowded



5. Working Effectively

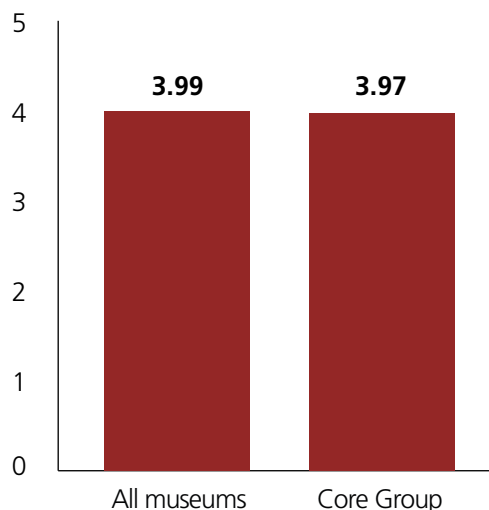
This section focuses on how museums are run, looking at their workforce, their policy and planning, buildings provision and their financial operations. The way in which museums are managed has major implications for their ability to care for their collections and to provide high standards of service for their communities and audiences. Spotlight 2015 asked questions about numbers, employment and development opportunities for staff and volunteers.

- Museums were asked to self-assess levels of performance in policy and planning, workforce development and buildings provision. The low levels achieved in 2006 prompted the inclusion of improvements in policy and planning as an action within 'A Museums Strategy for Wales'.
- In 2011 sources of income were surveyed for the first time. The 2015 survey took this further by asking museums to provide actual income and expenditure figures across a number of categories including earned income, public subsidy, contributed income and grants. This was intended to provide financial benchmarks which museums could use to assess their financial health.

5.1 Policy and planning

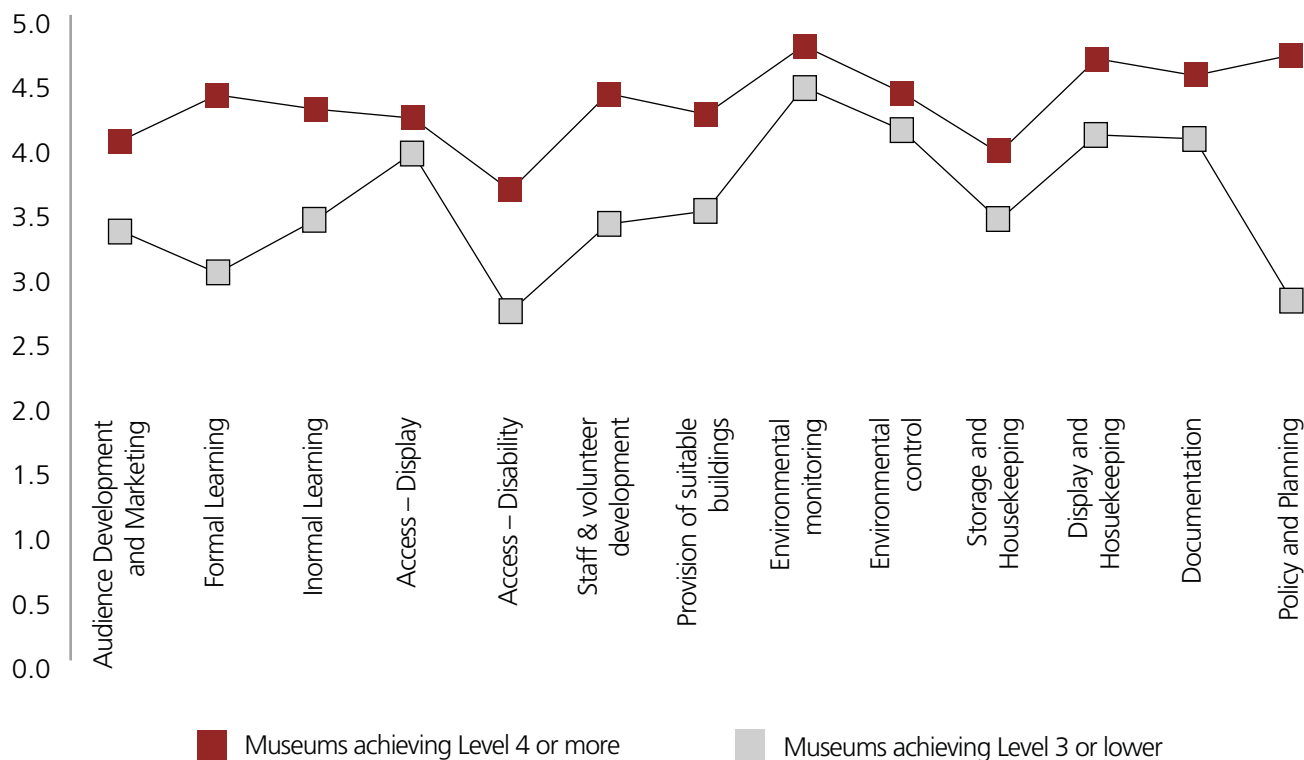
- Levels achieved for standards of policy and planning have increased considerably since the last Spotlight survey with 92% (66) of respondents to the question achieving a level three or above in the Range Statement.
- 63% (45) of respondents achieved a level four or higher, which compares to just under half in 2011. This is a significant step towards meeting action 5.1 of 'A Museums Strategy for Wales'²⁰.
- Museums that reach a higher level for the policy and planning range statement also tend to reach higher levels for other Range Statements as the table below demonstrates.
- Museums recording a level four or above achieved an average of 4.32 across all areas while those recording a level three or below achieved 3.54. It is worth noting that only 8% (6) of museums recorded below a level three.

Figure 5: Average service levels for management; Policy and Planning; Staff & Volunteering Development; Provision of Suitable Buildings



²⁰ Action 5.1 seeks to improve levels of policy and planning in museums in Wales 'A Museums Strategy for Wales', p30, op cit

Figure 5.1: Impact of policy and planning on other service levels



5.2 Workforce

Museums were asked to provide overall numbers of people in their workforce whether paid or voluntary and what roles they fulfilled. They were also asked to provide information about the level of staff and volunteering development opportunities they provide.

- For Spotlight 2015, museums were asked to provide workforce data for the financial year (April – March) rather than the calendar year as in previous Spotlight surveys. This change was made in order to align workforce with financial information provided by museums, which is collected based on financial years and to enable comparisons with data collected from museums by Museum Development providers in England.
- 3,496 people work in museums in Wales based on data provided by museums for 2013/14. This compares with 3,435 in 2011 and 2,640 in 2006. This rise is perhaps unexpected given the considerably smaller sample size for the 2015 survey (80 responses) compared to the 2011 survey (106 responses). However, this increase can be explained wholly by a rise in the number of volunteers.

- When the figures for the core group are examined, there has been a fall in the paid workforce of 4%.
- There were 1,196 paid staff in museums with 902 Full Time Equivalents in 2013/14.
- On average local authority museums employ 8 paid staff, independents employ 3, National Trust 24 and Amgueddfa Cymru 88.
- There was a 78% increase in the number of volunteers amongst the core group, which rose from 792 to 1,409.
- National Trust museums account for 30% of the total workforce despite representing only 13% of the respondents. This is largely due to their significant volunteer base. Amgueddfa Cymru and the independent sector make up 24% and 27% of the workforce respectively while local authority museums represent 19% due to their smaller volunteer base.
- 10 Accredited museums were entirely volunteer-run with no paid staff. These were all independent museums.
- Museums were asked to provide details of the roles fulfilled by their workforce. This question was not linked to the total workforce numbers they provided and therefore the numbers do not equate so results should be treated merely as a guide.

5.3 Volunteers

Volunteers are an increasingly important part of the museum workforce. Volunteer involvement makes a huge difference to museums – everything from enhancing the visitor experience, caring for and documenting the collections, business planning and managing the finance accounts. Many museums also rely on voluntary trustees to help ‘steer the ship’ and ensure museums are sustainable in challenging times.

- 66% of the total workforce is voluntary. This has increased from 62% reported in the 2011 survey. Based on the survey responses there was a total of 2,300 people volunteering for museums in 2013/14.
- National Trust properties had the greatest number of volunteers with a total of 846, who contributed the most hours, 74,543 in 2013/14.
- Amgueddfa Cymru reported the greatest growth in volunteer numbers, which increased from 70 in 2010 to 230 in 2013/14.
- 86% of museums (64) are supported by volunteers. Only 10 museums said they did not have any volunteers.
- Volunteers contributed on average 89 hours per year in 2013/14 (based on 51 responses that had volunteers and provided both volunteer numbers and hours).
- Volunteers contributed an estimated 177,815 hours in 2013/14. The Heritage Lottery Fund values volunteer time at up to £350 per day for professional services, £150 for skilled work and £50 for unskilled work based on a 7.5 hour day²¹. Information on the breakdown of the level of work undertaken by volunteers was not collected in 2015, but using the same ratio established in 2011²², the value of volunteer time to museums in Wales can be counted as follows:

$$163,590 / 7.5 \times £50 = £1,090,600$$

$$14,225 / 7.5 \times £150 = £284,500$$

$$\text{Total} = £1,375,100$$

- While the overall number of volunteers has risen compared with Spotlight 2011, the number of volunteer hours contributed has actually fallen. Based on the total number of volunteer hours contributed divided by the total number of volunteers, the average number of hours contributed by volunteers per year has fallen from 114 in 2010 to 89 in 2013/14.
- The core group’s paid workforce fell by 4% since the Spotlight 2011 survey while there was an 78% increase in the number of volunteers.

5.4 Workforce development

- On average museums which recorded a level four or more on the workforce development range statement achieved higher average levels across all levels of service.
- 52 museums achieved a level four or more which is greater than the 45 that achieved this level in 2011 despite there being a smaller sample size in 2015.
- Higher levels of workforce development had their most pronounced impacts across user service levels in particular disability access, formal and informal learning, audience development and marketing and display.

²¹ www.wcva.org.uk/advice-guidance/volunteers

²² In 2011, the ratio for unskilled work and skilled work was calculated as 92:8. www.gov.wales/docs/drah/publications/130503spotlight2011en.pdf, p72, op cit

Figure 5.4.1: Total workforce (paid staff and volunteers) 2010 (total workforce breakdown: 3,435) and 2013/14 (2494) by role

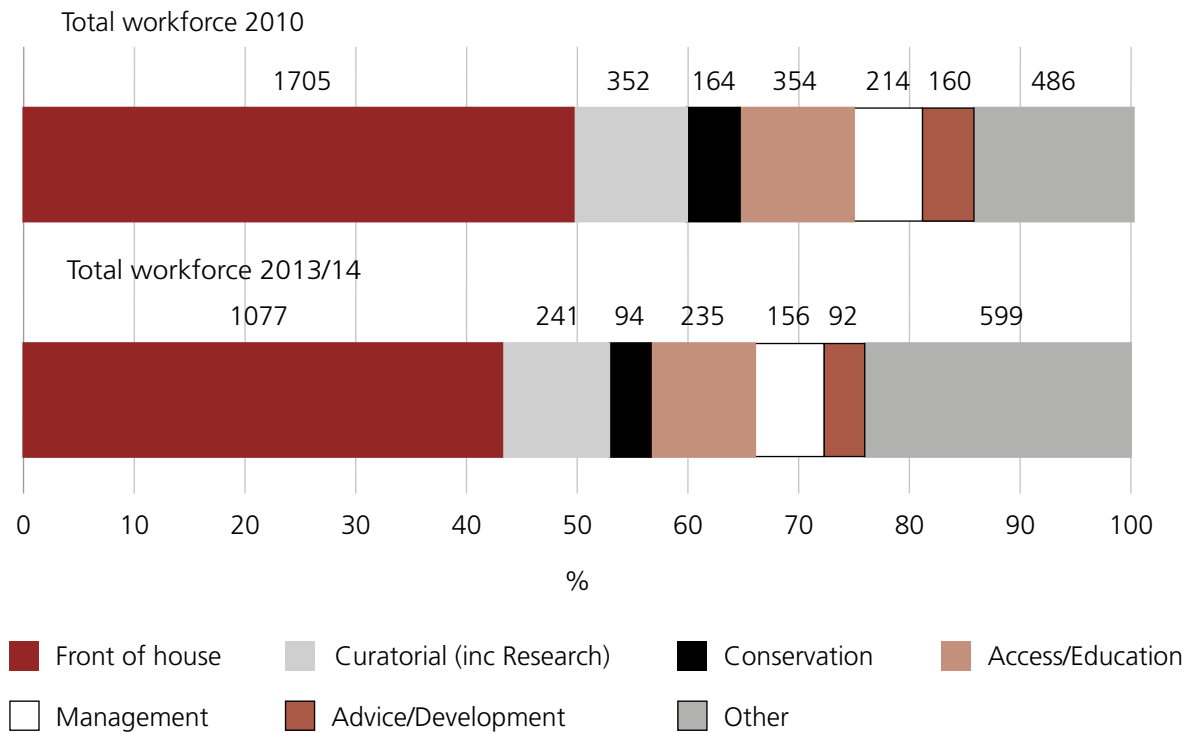
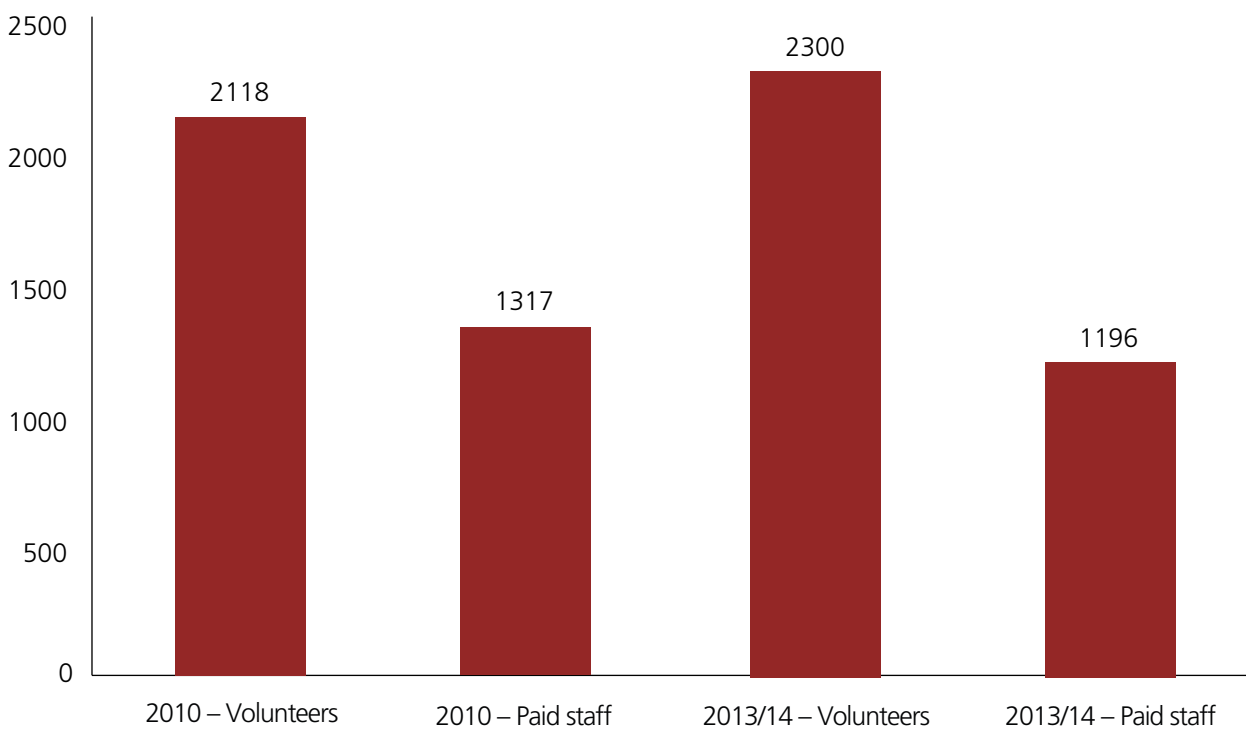


Figure 5.4.2: All museums total workforce 2010 and 2013/14 by employment type (volunteer/paid)



In 2010, volunteer data was provided by 78 respondents and paid staff data by 90 respondents. In 2015, volunteer data was provided by 74 respondents and paid staff data by 72 respondents.

Figure 5.4.3: Core group workforce 2010 and 2013/14 by employment type (volunteer/paid)

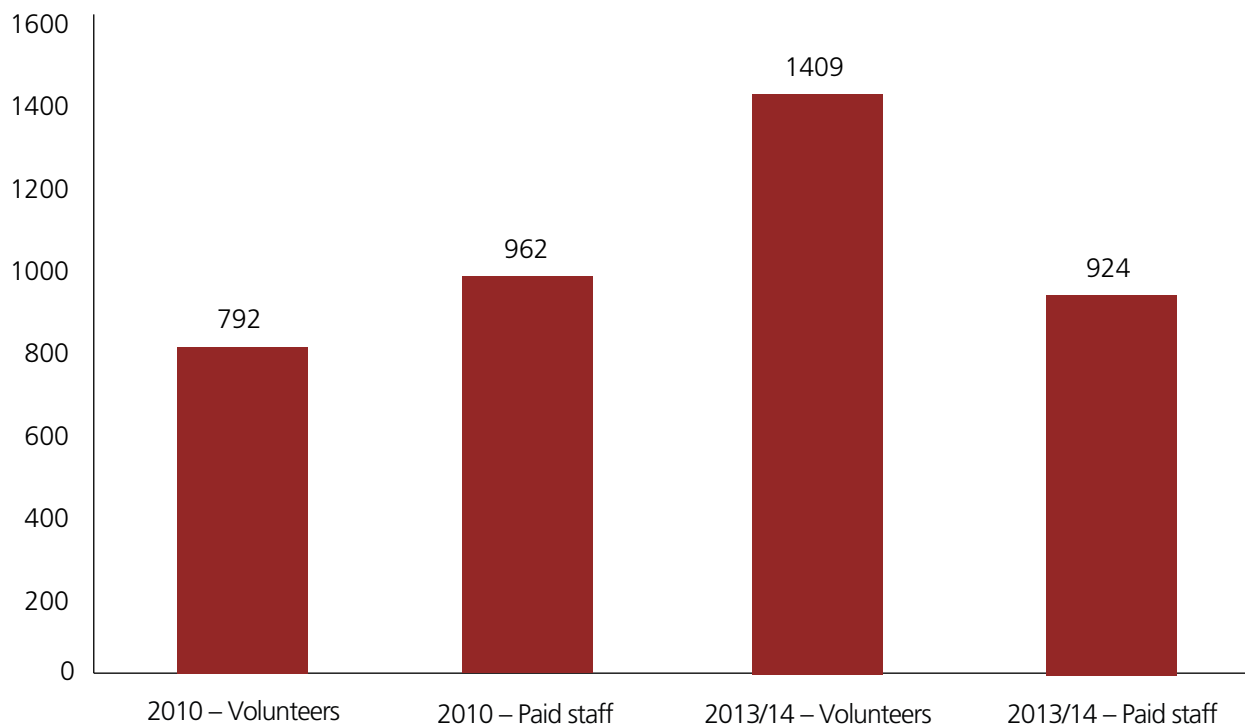


Figure 5.4.4: Proportions of workforce by type of museum

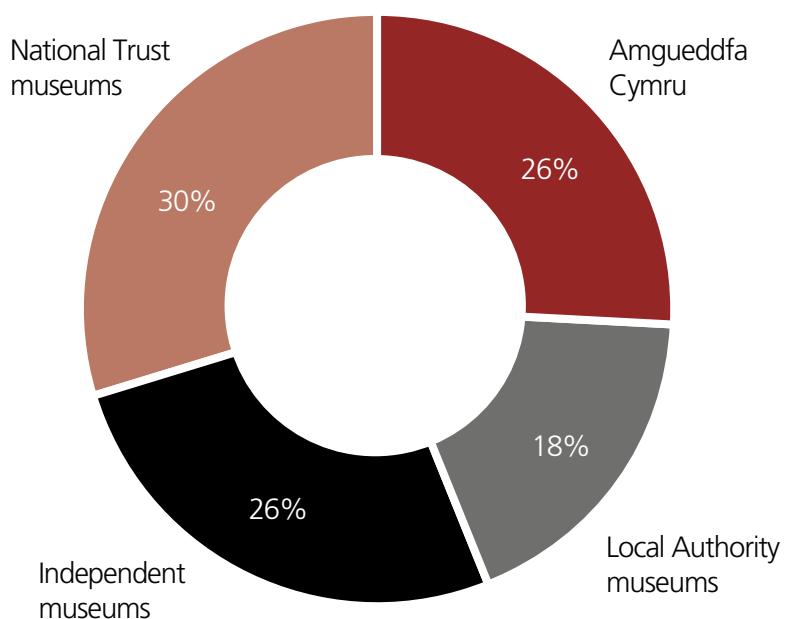


Figure 5.4.5: Proportions of workforce by type of museum and employment type (volunteer/paid)

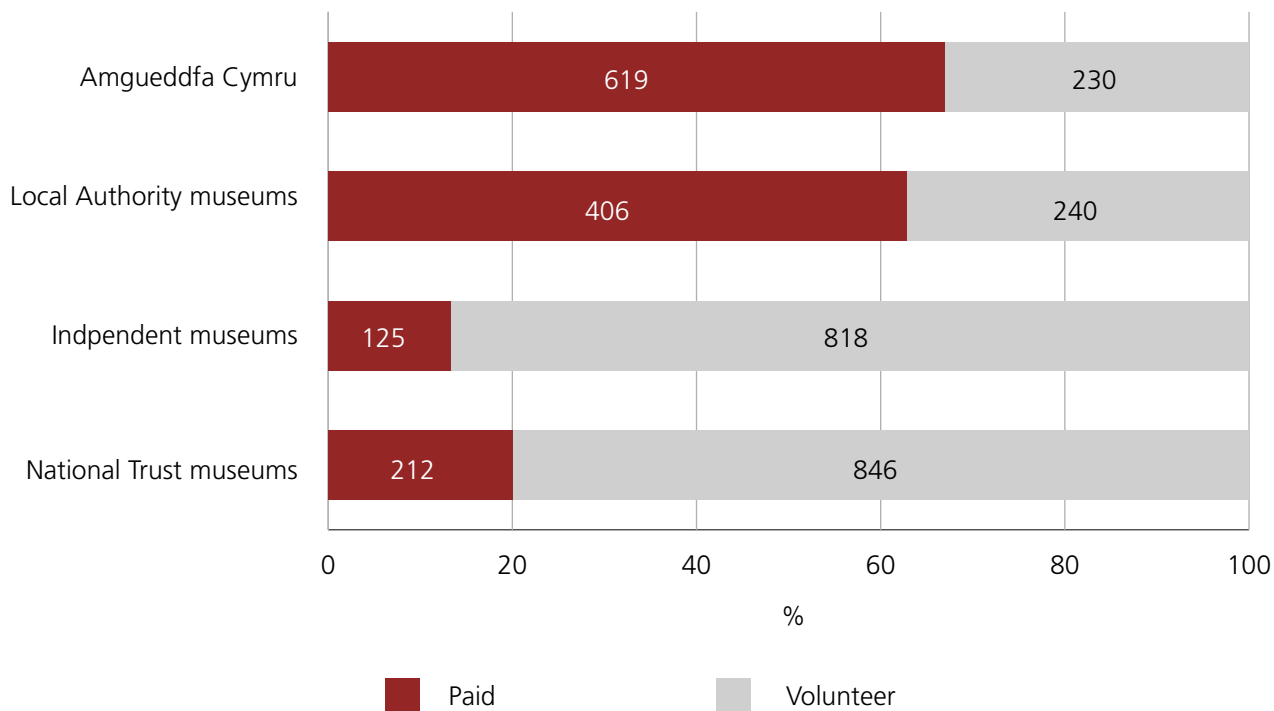


Figure 5.4.6: Average workforce levels by type of museum

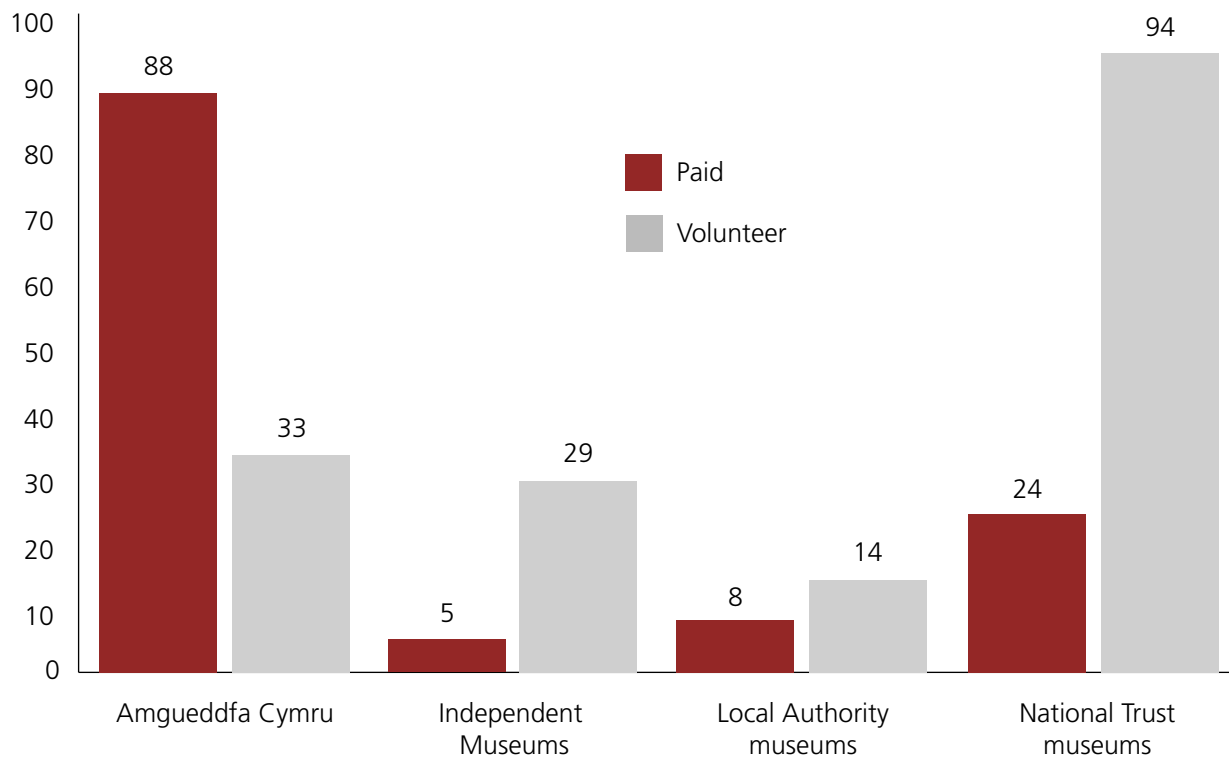


Figure 5.4.7: Average workforce levels by size of museum

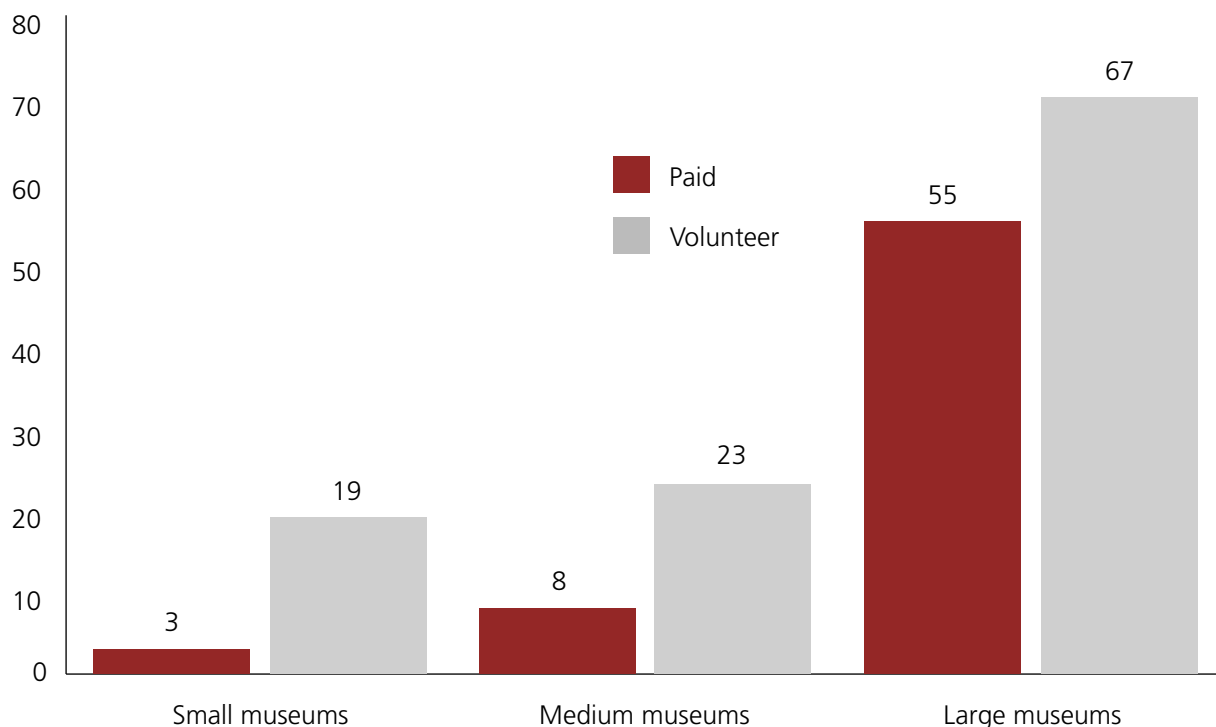


Figure 5.4.8: Average volunteer hours contributed by size and type of museum (based on 61 responses that provided both volunteer numbers and hours)

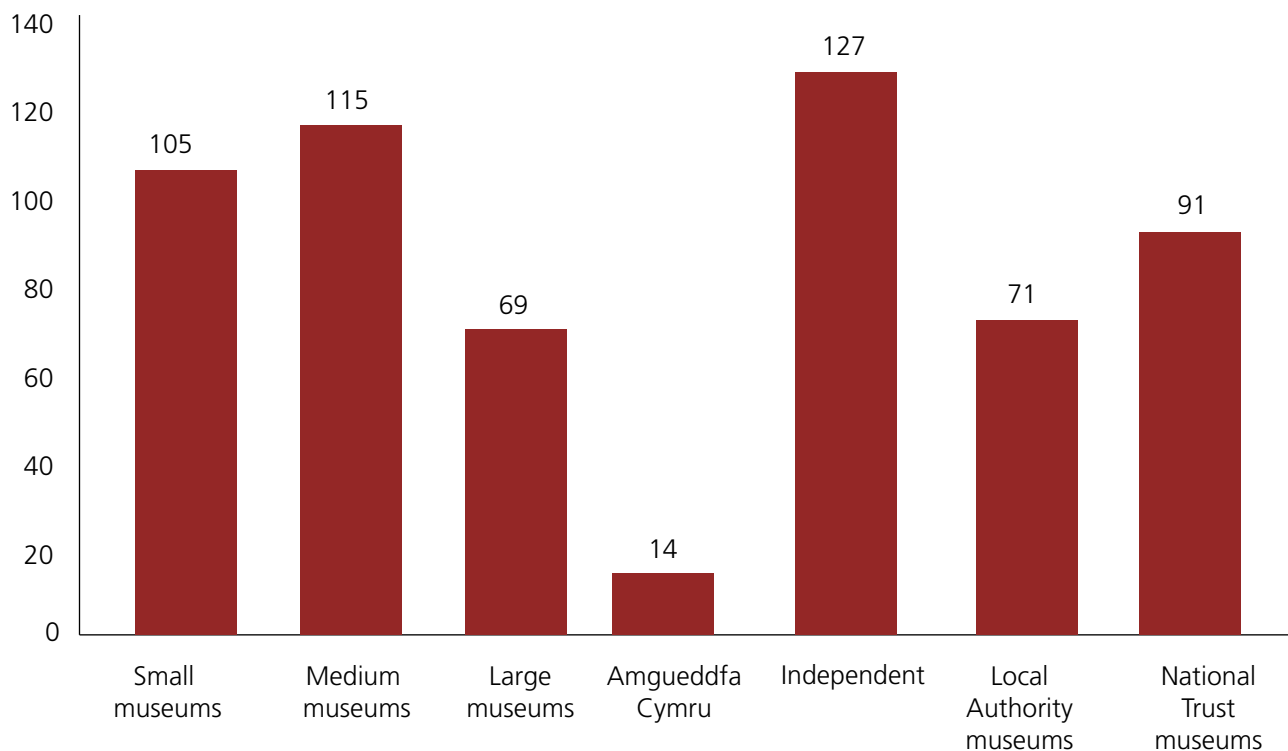
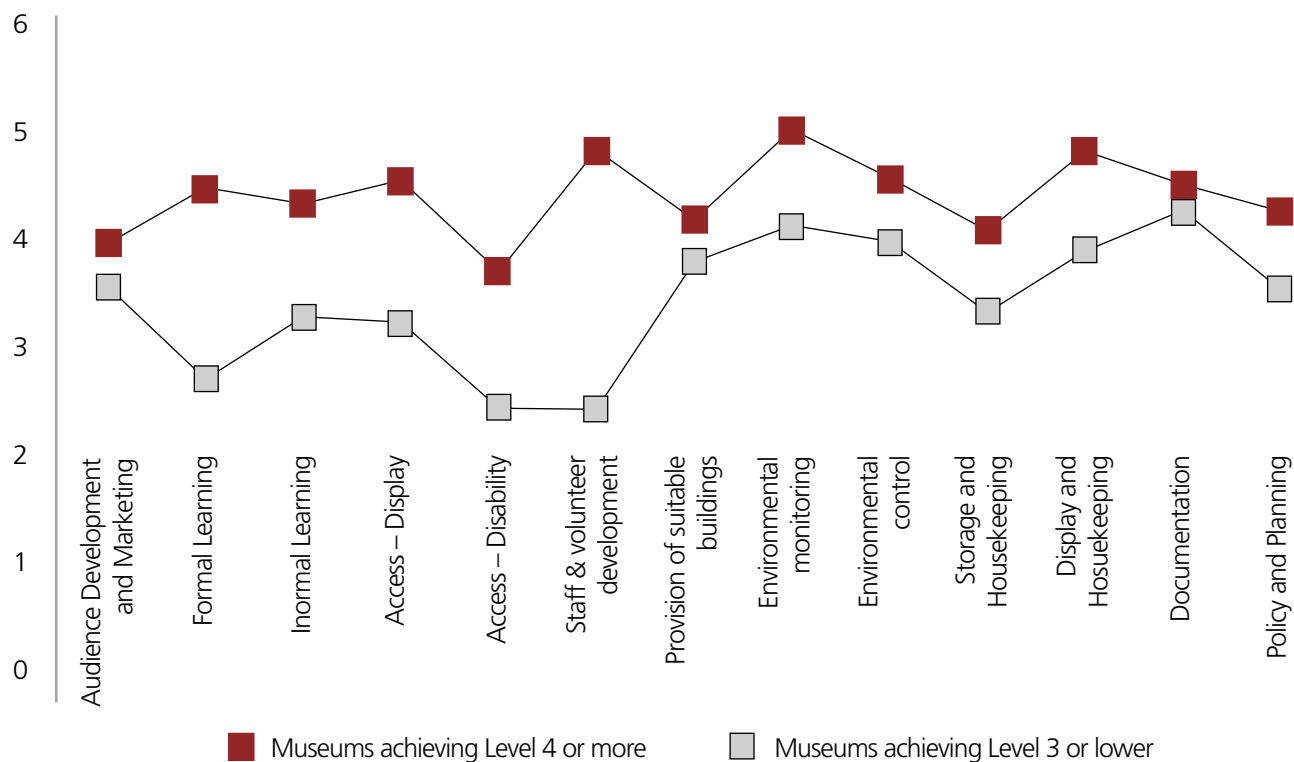


Figure 5.4.9: Service levels for museums which exceed minimum requirements for staff and volunteer development



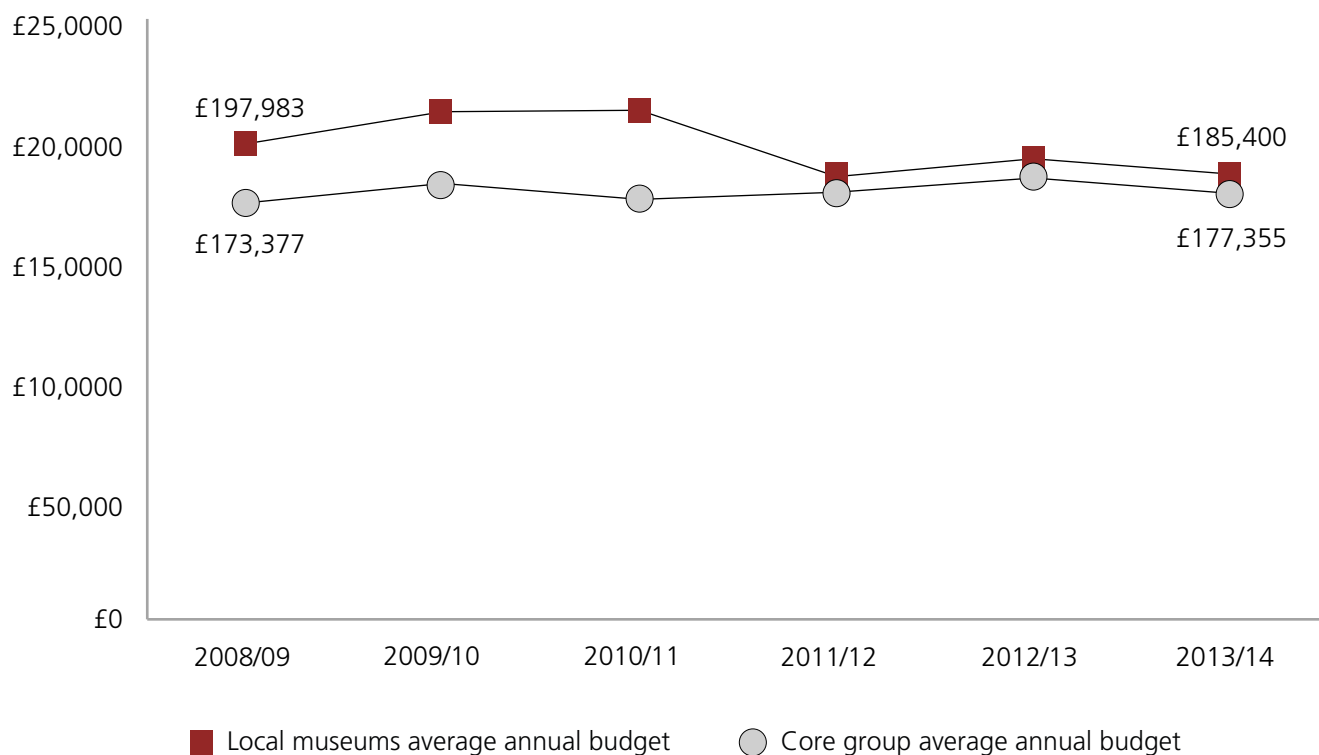
5.5 Budgets

For the 2015 survey there was a change in how museums were asked about their financial information in order to provide benchmarks that museums could use to assess their financial health.

Budget information is provided as averages because several museums operate central budgets covering multiple sites. Some budget elements may be operated centrally but others may be devolved to individual sites. Consistent financial information can be difficult to capture across such a diverse group of museums, often with distinct accounting methods and different financial years. Financial information should therefore be read as indicative.

- The overall budget figures essentially represent the spending power of museums while the breakdowns look at how this is made up. Museums were asked to provide budget data for the last three years (2011/12, 2012/13 and 2013/14). 50 museums supplied budget data across all three years while 32 museums had complete data for the period 2008/9 to 2013/14.
- Budgets are falling. On average, local museum budgets fell by 1% between 2011/12 and 2013/14.
- Annual budgets amongst the core group of museums rose in nominal terms over the period 2008/9 to 2013/14. However, if inflation were to be factored to the annual budget figures, they would show a fall in real terms.

Figure 5.5: Average annual budget for local museums (32 respondents) and core group (28 respondents) 2008/9 to 2013/14 (based on museums which supplied data for all years)



5.6 Income

With the current financial climate, museums are increasingly looking to income generation and diversification where possible to support their operations. For the first time, Spotlight 2015 asked museums to provide a breakdown of income sources.

5.6.1 Admission charges

Admission charges are an important source of income for many museums, however they are only one in a number of income streams and many museums continue to provide free entry.

- 49% of museums charge admissions, 47% do not and 4% sometimes charge admission for instance for entry to exhibitions.
- 61% of local authority museums and 37% of independent museums provide free entry.
- It is currently Welsh Government policy that entry to Amgueddfa Cymru is free.

- The proportion of museums which do not charge for entry has fallen slightly from the 2011 survey, however, this is likely due to the smaller sample size being disproportionately affected by a small number of museums introducing admission charges.

5.6.2 Earned income

Earned income is an increasingly important part of the financial make up of a museum. Alongside admissions, which have been separated out for the purposes of this survey, earned income can include income from retail, catering, events and hospitality, educational activity and any other income from trading activity e.g. property rental.

- 90% (54) of museums that responded to the question generated earned income outside of admissions demonstrating the extent to which museums are engaging with income generating activities.
- £5,377,340 was generated by museums in earned income including admissions in 2013/14, based on responses from 60 museums.

5.6.3 Public subsidy

The main forms of public subsidy for museums in Wales are from the Welsh Government for Amgueddfa Cymru, local authority funding for local museums, Ministry of Defence funding for military museums and Higher Education funding for university museums. A number of independent museums also receive regular funding from local authorities.

- £29,778,976 was received by museums in public subsidy in 2013/14. Of this, £25,106,000 was received by Amgueddfa Cymru, the remaining £4,672,976 went to local museums.
- 72% (41 of 57) of museums that responded to the question reported they received public subsidy.
- Public subsidy made up 73% of total income reported by all museums.
- The levels of public subsidy received by museums varies considerably. For independent museums, public subsidy accounted for 20% of their income, while for local authority museums it accounted for 76%.
- 18 independent museums, including National Trust properties, received no public subsidy while 15 did receive public subsidy.

5.6.4 Contributed income

This includes all money received from the general public or friends (including friends/member schemes) for which no benefit is received in return, alongside any income from sponsorship, corporate membership schemes or other non-earned income.

- £3,039,496 was received by museums in donations in 2013/14, based on responses from 60 museums.
- £1,206,945 was received in other contributed income, based on responses from 22 museums. 30 museums stated they received no contributed income other than donations.

5.6.5 Grants

This was defined as including all money received in the form of grant/project income received within the financial year, excluding capital funding.

- £1,324,556 was received by museums in grant funding in 2013/14. Of the 54 museums which responded to the question, 16 said they did not receive any grant funding.

5.6.6 Capital grants/ project income

A question on capital investment in museums was included for the first time in 2015 to establish a baseline on which ongoing investment could be measured. While capital investment would not necessarily be consistent year on year it can provide a useful indicator of the long term strategic investment in the sector. Capital investment is important in enabling museums to improve or expand their business in order to ensure that they can provide engaging spaces for audiences and respond to changing visitor demographics and expectations.

- 16 museums received capital investment in 2013/14 including all seven Amgueddfa Cymru museums.
- Capital investment was £3,302,400 in 2013/14, of which 91% was at Amgueddfa Cymru.
- Only two local authority museums reported any capital investment compared to seven independent museums.

5.7 Local authority support

- Of the 53 museums that stated they received local authority support (whether in-kind or financial), four reported a rise in support between 2013 and 2015, 22 said that it had stayed the same while 27 reported a fall in support.
- 12 small museums benefit from the support of a Museum Mentor employed by a local authority, but 5 museums did not acknowledge this support in their responses.²³

²³ Information about museum mentor arrangements is held by MALD

Figure 5.7.1: Sources of income for all museums by type

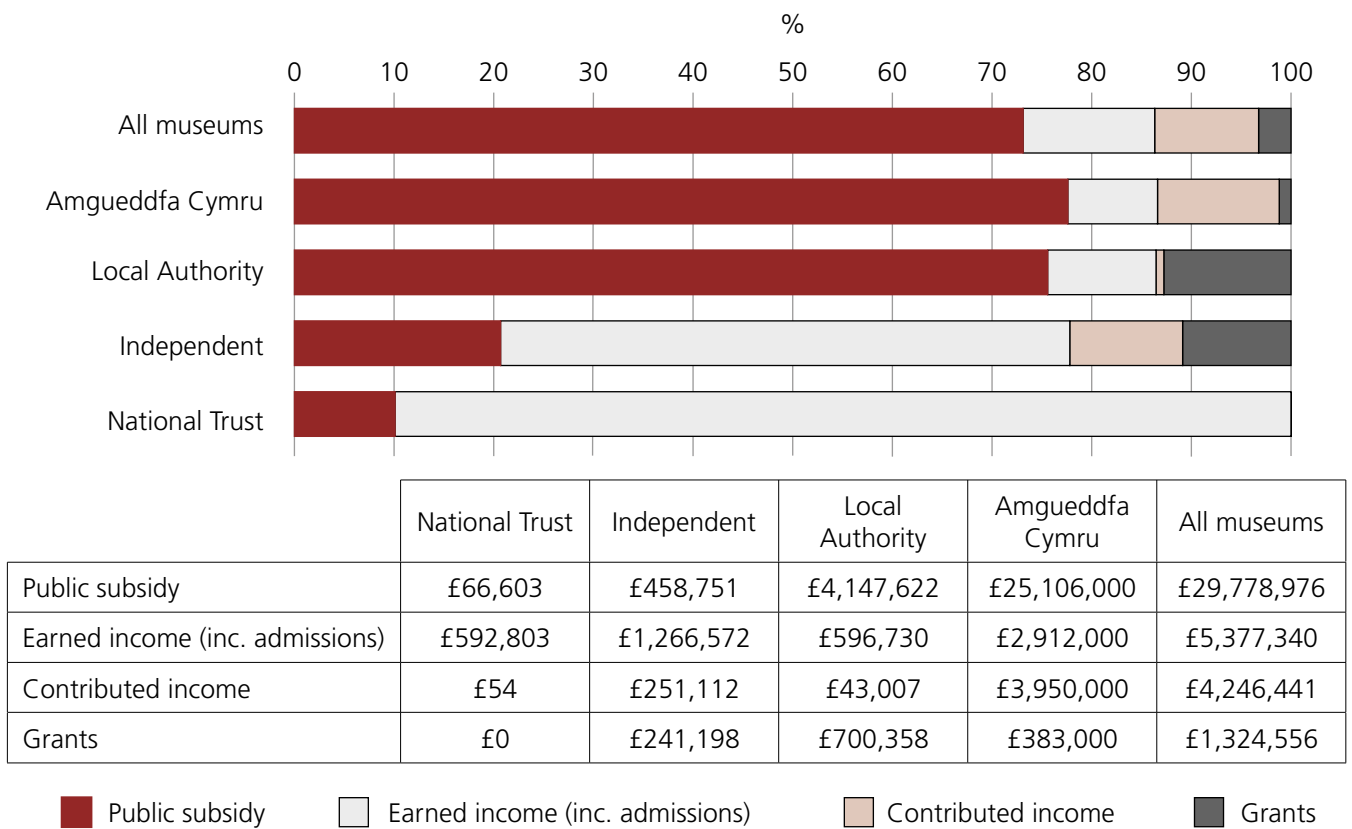
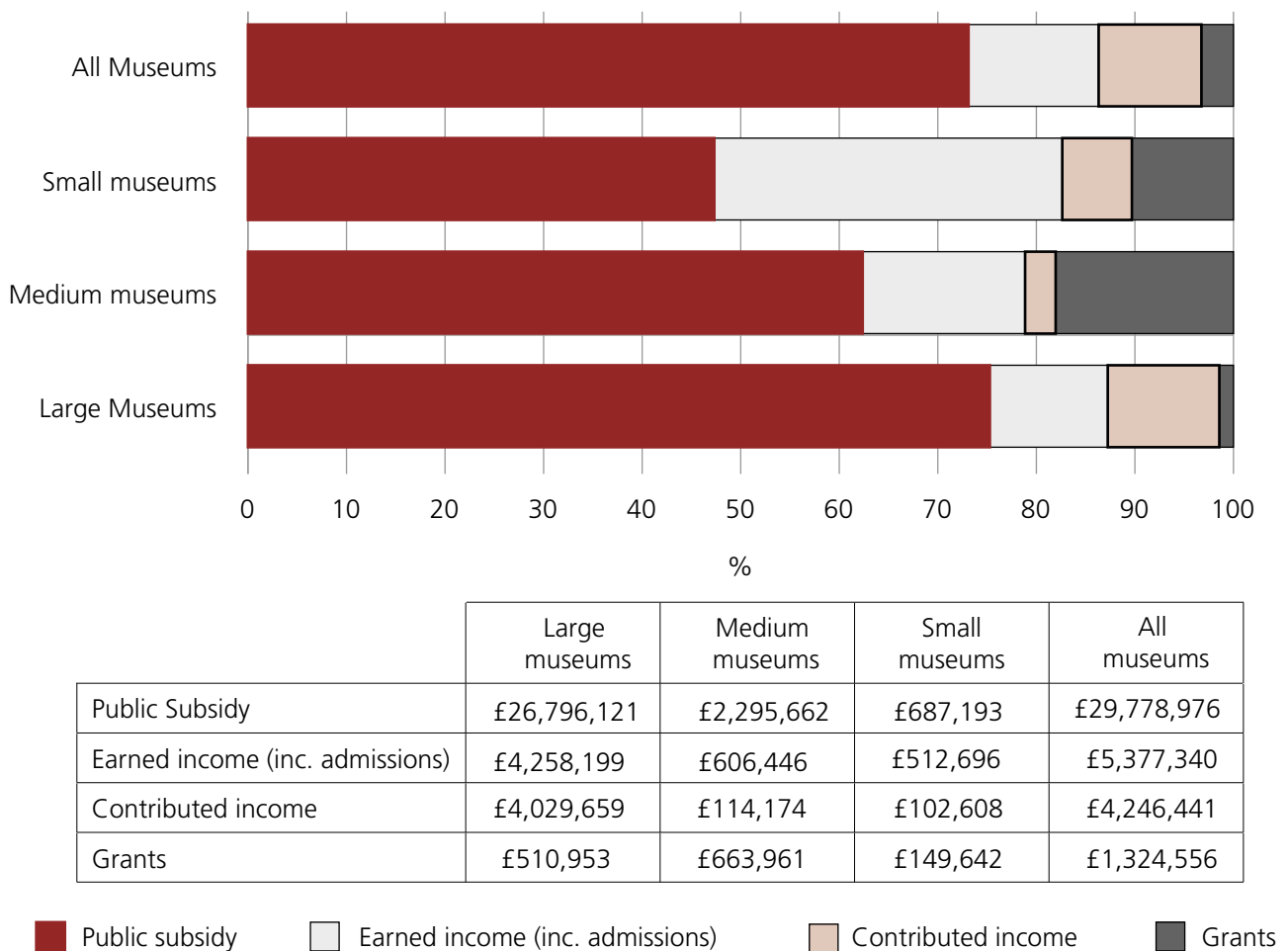


Figure 5.7.2: Sources of income for all museums by size



5.7.3: Sources of income for charged for entry museums by size 2013/14

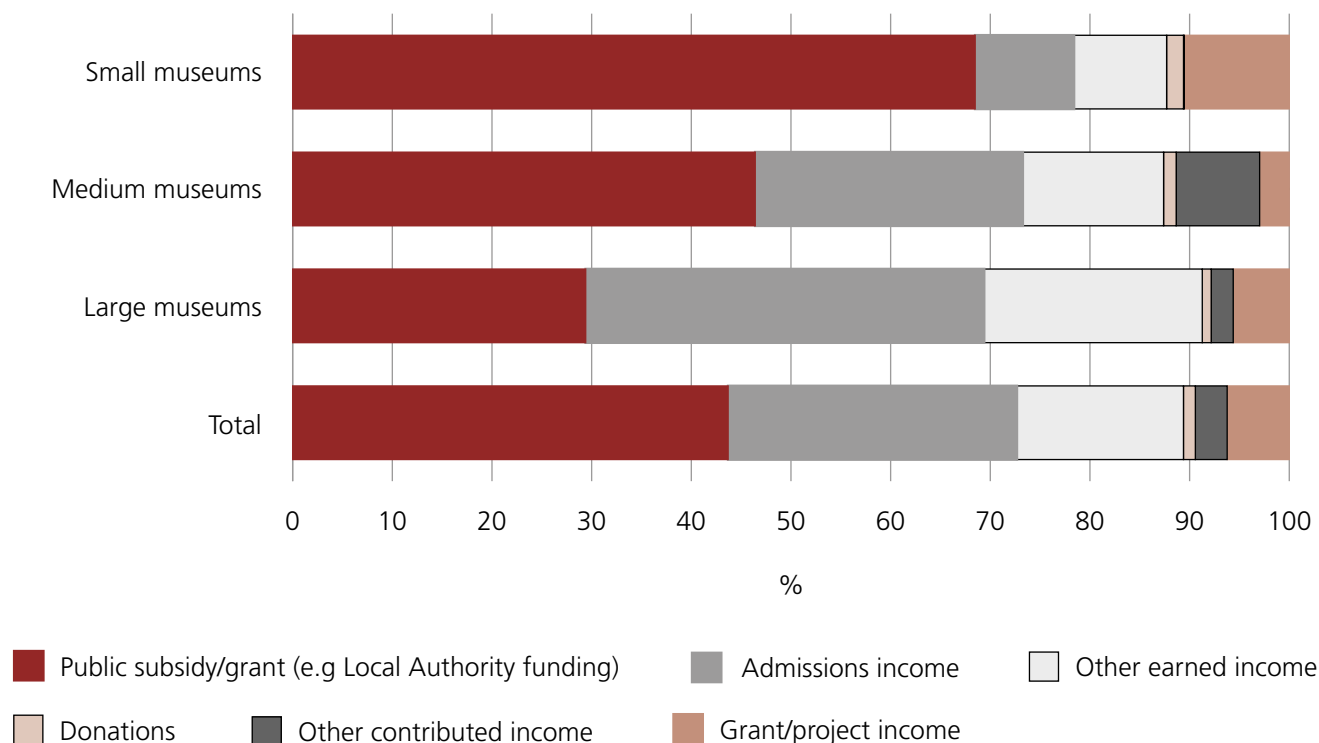


Figure 5.7.4: Sources of income for free entry museums by size 2013/14

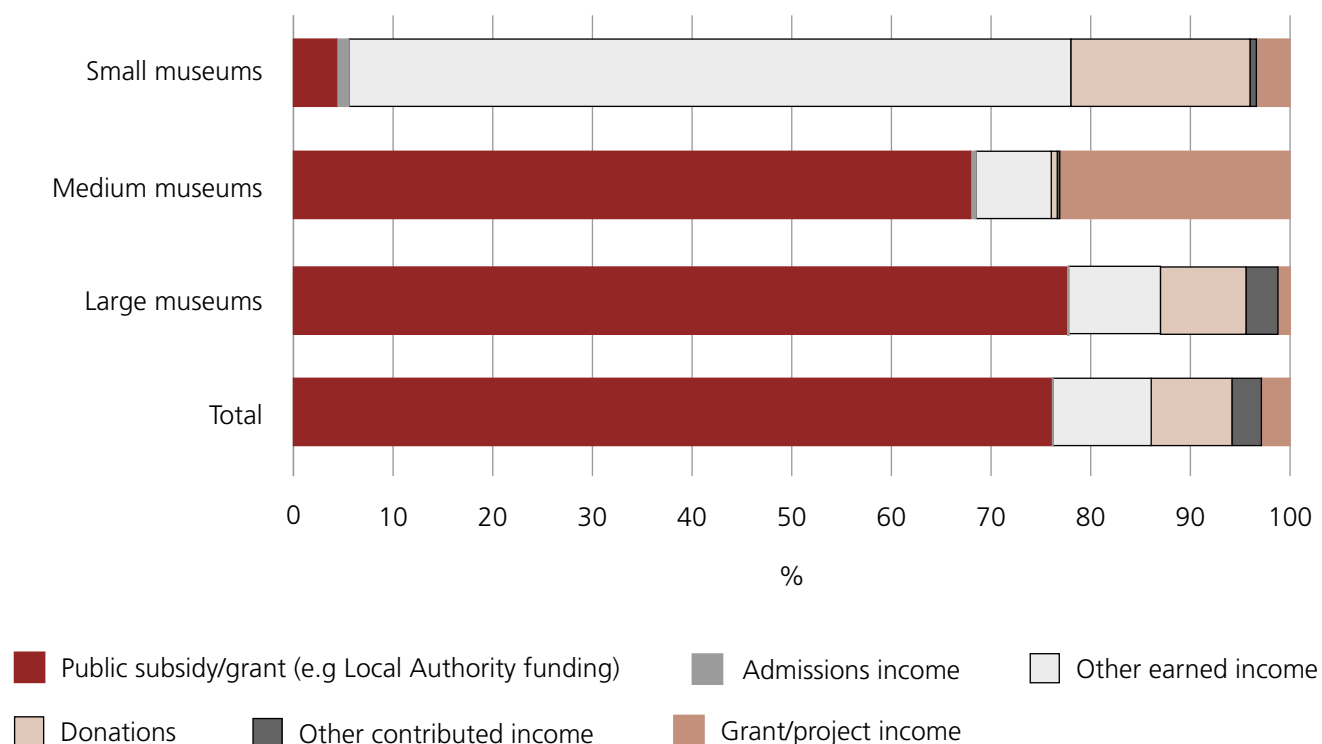


Figure 5.7.5: Sources of income for charged entry museums by type 2013/14

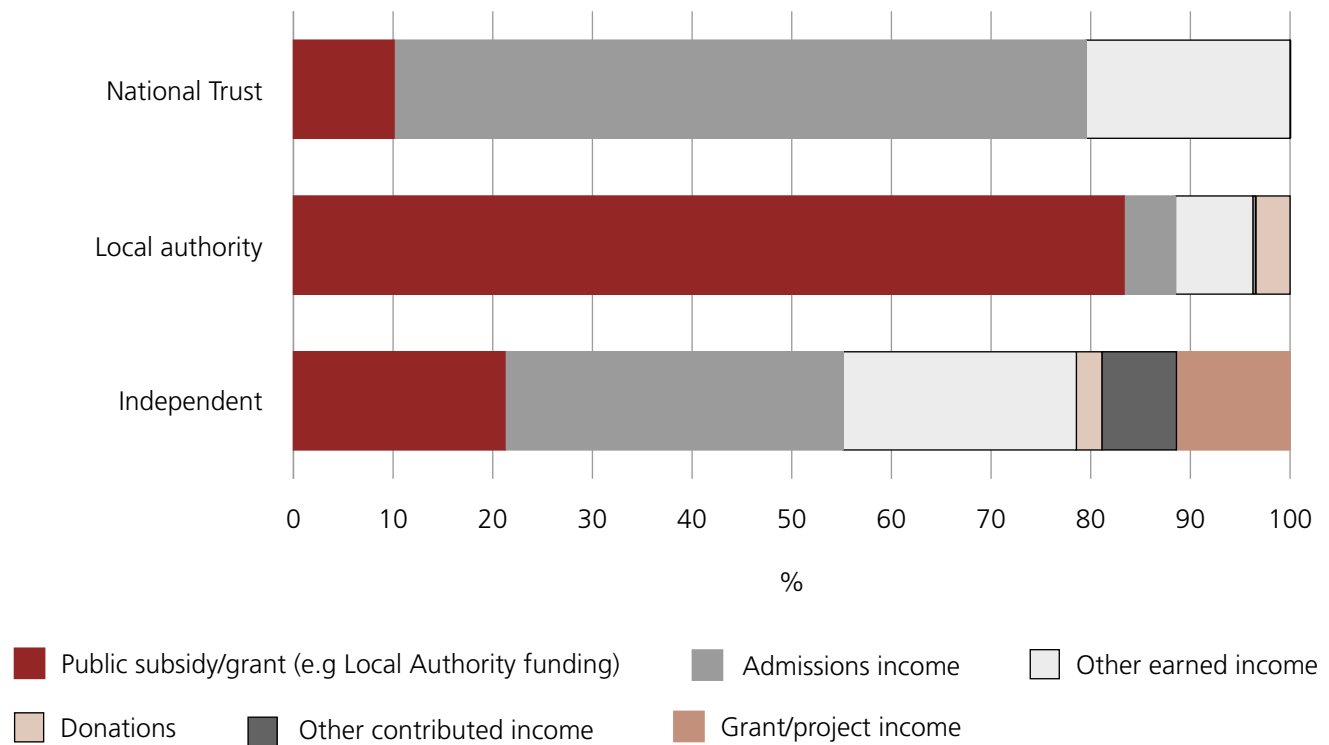
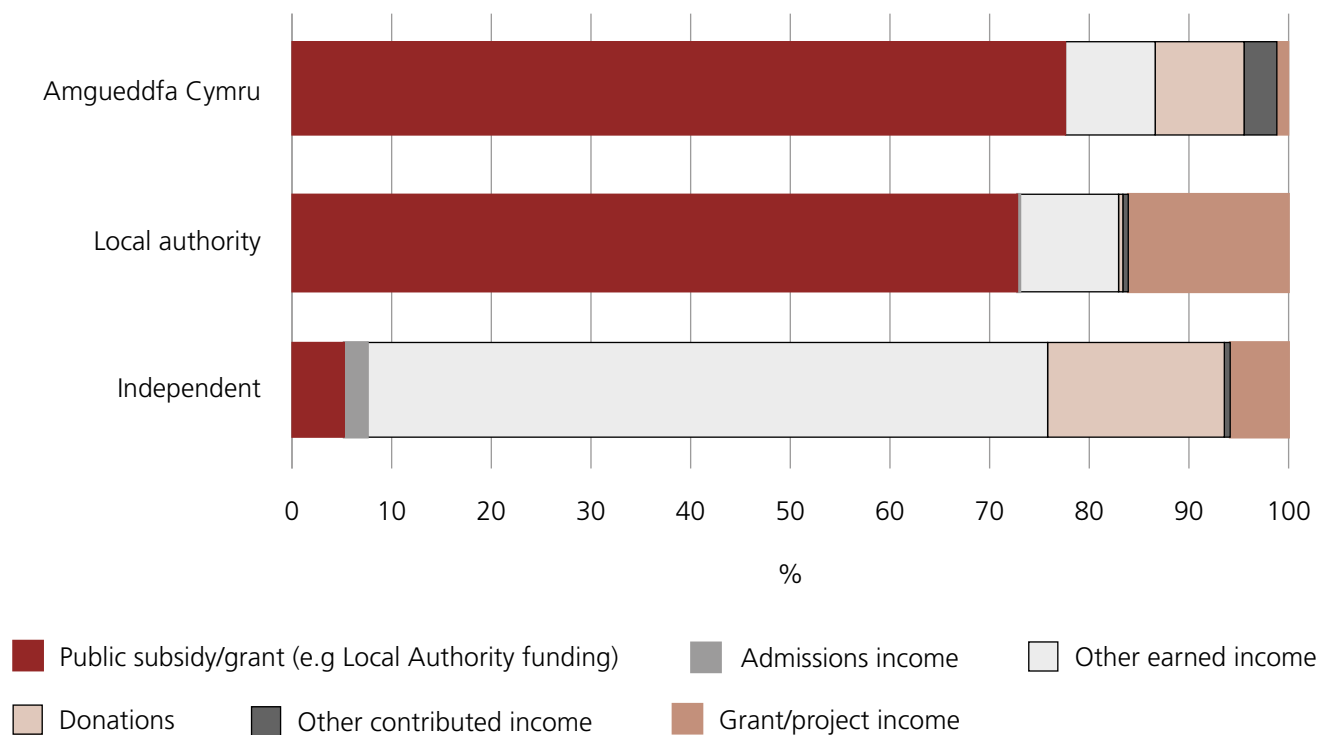


Figure 5.7.6: Sources of income for free entry museums by type 2013/14



6. Services provided by Amgueddfa Cymru

Amgueddfa Cymru provides many services for museums across the whole of Wales. Support and partnerships with local museums range from formal relationships through programmes such as Sharing Treasures²⁴ to personal contacts between individuals who provide advice and information.

- Amgueddfa Cymru is clear about its commitment to promoting and contributing to the delivery of 'A Museums Strategy for Wales 2010-2015'²⁵.
- Based on the responses to the survey there appears to be a fall in the number of museums accessing services provided by Amgueddfa Cymru. This could be explained by fewer museums responding to the question or lack of awareness about what constitutes an Amgueddfa Cymru service. A number of museums highlighted their participation in Sharing Treasures as one of their successes however did not identify that they had accessed an Amgueddfa Cymru service.
- 60% of local museums that responded to the Spotlight 2015 survey (44) said they accessed a service provided by Amgueddfa Cymru.
- The most common forms of support accessed by local museums were collections advice, conservation advice and object loans.
- Small local authority or independent museums were most likely to access services provided by Amgueddfa Cymru. This is because large museums are more likely to have in-house sources of expertise and are therefore have less need for Amgueddfa Cymru's support.

- Other services that museums stated they had accessed included exhibition advice, loans advice, design and display, object identification, information on volunteer programmes and support with friends and patrons schemes.
- Amgueddfa Cymru can offer wide ranging support and works in partnership with MALD to provide some services, including training. Museums are advised to contact Amgueddfa Cymru or MALD if they are unsure of what is available²⁶.

In the Spotlight

In 2015, the Winding House, New Tredegar received the Telegraph Family Friendly Museum Award Special Commendation for Outstanding Contribution to their Local Community – the first time any museum has received such a commendation. This was in recognition of the testimonies local families gave to their museum, saying how much it meant to them.



Photo courtesy of Telegraph/Kids in Museums

²⁴ www.gov.wales/topics/cultureandsport/museums-archives-libraries/funding/sharing-treasures-review/?lang=en

²⁵ Amgueddfa Cymru – National Museum Wales Operational Plan 2014-15 www.museumwales.ac.uk/4440/

²⁶ Amgueddfa Cymru Contact Details – www.museumwales.ac.uk/enquiries/

In the Spotlight

Sharing Treasures at Cyfarthfa Castle Museum & Art Gallery

In 2013 with funding received from the Sharing Treasures scheme the museum was able to convert a store into a dedicated temporary exhibition gallery. For the first exhibition as part of Sharing Treasures a selection of works by Sir Kyffin Williams were loaned from the National Library of Wales to complement three works from the museum's permanent collection. The launch of this exhibition and the gallery itself in July 2013 led to the museum's busiest visitor numbers ever for July and August. In the past two years, the temporary exhibition space has proved very popular and hosted a wide variety of displays including sculpture, community led exhibitions and social history. There is currently a two year waiting list of artists and social history displays ready to exhibit in this versatile gallery.



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Figure 6.1: Support received by local museums from Amgueddfa Cymru by type

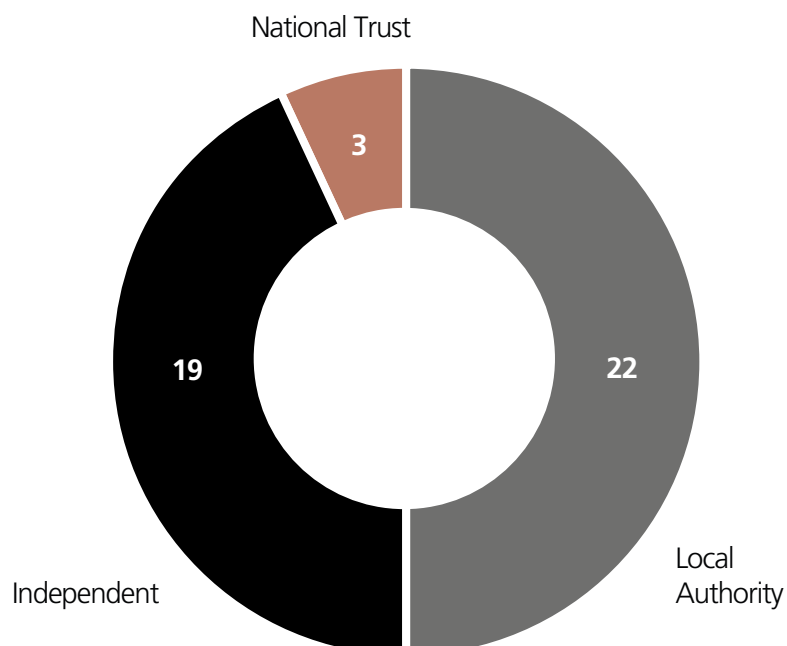


Figure 6.2: Support received by local museums from Amgueddfa Cymru by size

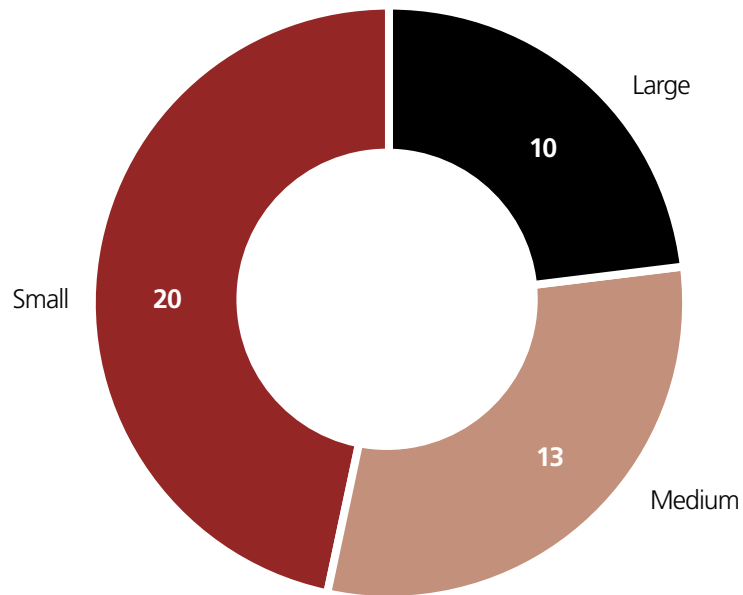
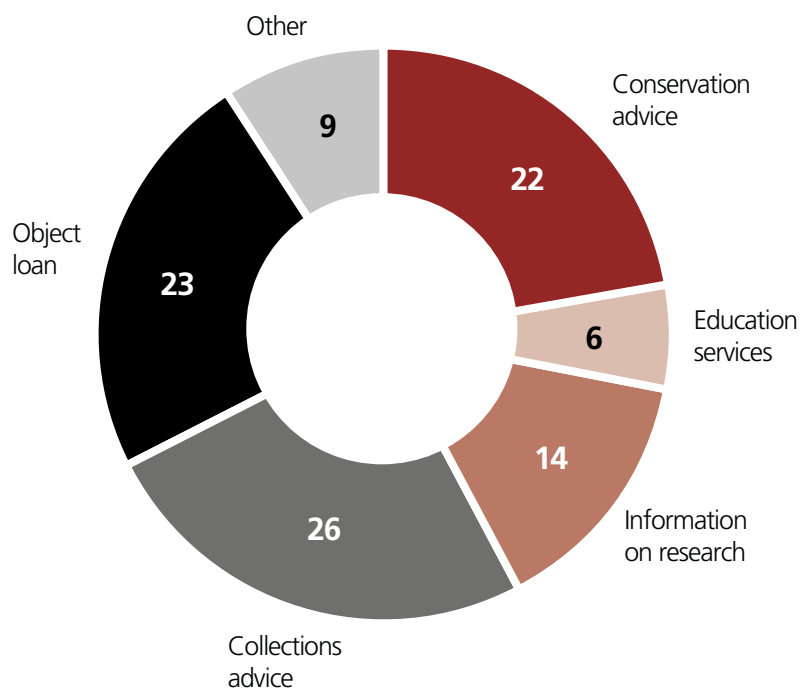


Figure 6.3: Type of service received by local museums from Amgueddfa Cymru



Appendix A

List of museums by size, determined by annual visit figures

Large

Big Pit: The National Mining Museum of Wales
Bodelwyddan Castle Trust
Cardiff Castle
Cardiff Story
Chirk Castle
Cyfarthfa Castle Museum & Art Gallery
Erddig
Firing Line, Cardiff Castle Museum of the Welsh Soldier
National Museum Cardiff
National Roman Legion Museum
National Slate Museum
National Waterfront Museum
Oriol Ynys Môn
Penrhyn Castle
Powys Castle
Royal Welch Fusiliers Museum
St Fagans: National History Museum
Swansea Museum

Medium

Aberconwy House
Abergavenny Museum
Aberystwyth University, School of Art Gallery and Museum
Carmarthenshire County Museum
Ceredigion Museum
Chepstow Museum
Conwy Toll Bridge, Toll House
Egypt Centre – Swansea University
Flintshire Museums Service
Glynn Vivian Art Gallery
Greenfield Valley Museum
Gwynedd Museum and Art Gallery, Bangor
Judge's Lodging
Llanerchaeron
Museum of Speed
Narrow Gauge Railway Museum
National Wool Museum
Nelson Museum & Local History Centre
Newport Museum and Art Gallery
Plas Yn Rhiw
Pontypool Museum
Pontypridd Museum

Rhyl Miniature Railway
Scolton Manor Museum
Tenby Museum and Art Gallery
Tudor Merchant's House
Winding House
Wrexham County Borough Museum & Archives

Small

Barmouth Sailors' Institute
Bersham Ironworks & Heritage Centre
Blaina Heritage Museum
Brecknock Museum and Art Gallery
CARAD
Carmarthenshire Town Museum
Cefn Coed Colliery Museum
Ebbw Vale Works Archival Trust
Holyhead Maritime Museum
Internal Fire, Museum of Power
Joseph Parry's Ironworker's Cottage
Kidwelly Industrial Museum
Llandudno Museum
Llanidloes Museum
Llanelli House
Lloyd George Museum
Llŷn Maritime Museum
Menai Bridge Community Heritage Trust
Narberth Museum
Old Bell Museum
Parc Howard Museum and Art Gallery
Penmaenmawr Cottages
Penrhos Cottage
Porthcawl Museum
Porthmadog Maritime Museum
Powysland Museum
Radnorshire Museum
Robert Owen Memorial Museum
Royal Mint Museum
Ruthin Gaol
Sir Henry Jones Museum
Tŷ Mawr Wybrnant

No visit figures provided

Regimental Museum of The Royal Welsh (Brecon)
Rhyl Museum

Appendix B

Range Statements

Museums were asked to select the Range Statement which best matches and describes their museum. The numbers assigned to the Range Statements signify levels of practice not scores. Museums should only aspire to those best practices appropriate to their circumstances.

Museums for Everyone

Audience Development and strategic marketing

1. No promotion, user research or audience development.
2. Production of basic promotional material (e.g. poster, leaflet) and/or regular press releases.
3. As above plus: Occasional, formal consultation with users and informal gathering of user feedback via visitor books, comment cards, consultation with Friends, focus groups etc. Feedback analysed, feedback responded to, results are fed back into planning. May be some bilingual provision.
4. As above plus: Up to date knowledge of demographic/social/economic context in which museum operates; Some basic market research/regular, systematic gathering of user response; A planned approach to all promotional activities based on these findings, (e.g. print, press coverage and/or paid advertising) and a dedicated budget; Targeting of particular audiences/user groups (not necessarily new ones); Some bilingual provision.
5. As above plus: Market research and monitoring of user response undertaken at regular intervals (at least 2 yearly) using consistent methods; Marketing/audience development is occasionally evaluated; Employment and/or regular input from marketing professional; Most communication available bilingually.
6. As above plus; Non traditional/minority users are targeted and appropriate means of communication used; All audience development and Marketing activities are regularly monitored and evaluated; Audiences are consulted and their views/responses integrated into planning process; All communication available bilingually.

Access – Provision of formal learning

1. No contact has been made with formal education sector. Requests from formal education sector cannot be catered for.
2. Formal education sector is not actively targeted, but groups make independent visits and/or special sessions are possible. At least two of the following are available:
 1. Lectures; 2. Study packs or worksheets;
 3. Electronic media (including website);
 4. Role play; 5. Creative workshops;
 6. Guided tours; 7. Interactive activities.
3. As above plus; Groups make independent visits, limited support material available, some links are made with relevant school/college curricula or learning programmes. An understanding of the 'Inspiring Learning for All' framework. Some knowledge about local education sector, potential users and educational potential of the museum. Some consultation with group leaders/organisers about provision. May be some bilingual provision.
4. As above plus; Generic learning outcomes (GLO) are used to measure learning impact; Programme of direct sessions for groups; Access and/or facilities for researchers; Some support material compatible with relevant curricula or learning programmes; Working knowledge of local education sector, potential users and educational potential of the museum. Ad hoc input from external educators; Some bilingual provision.
5. As above plus; General learning objectives are set for sessions which are delivered by people with specific skills and/or educational expertise; Over 50% of support materials/sessions are compatible with relevant curricula or learning programmes; Regular contact with external

educators who have an informal input into service; Summative evaluation of sessions; Employment of full-time educator to develop and manage the service; Most communication available bilingually.

6. As above plus; Programme of direct sessions catering for a wide range of ages, abilities and learning styles; Learning objectives for sessions are negotiated and regularly reviewed with users; All support material/sessions are compatible with relevant curricula or learning programmes; All new sessions/materials are piloted and evaluation is carried out in house and/or externally; Regular contact with external educators, who work in partnership with the service; Research informs the learning needs of the formal sector and findings used to inform service development; Are a 'learning organisation' as defined in the 'Inspiring Learning for All' framework; All communication available bilingually.

Access – Provision of informal learning

1. No deliberate provision, but displays are available.
2. Personal contact with staff/volunteers only by arrangement. At least one main and one subsidiary means of interpretation are available from: Labels; Display panels; Audio visual systems; Printed guides or catalogues; Oral information from staff.
3. As above plus, Information and knowledge about the collections made available by making at least two of the following events/activities available; Lectures; Study packs or worksheets; Electronic media (including website); Role play; Creative workshops; Guided tours; Interactive activities; An understanding of the 'Inspiring Learning for All' framework; Possibility of arranging access to collection not on display/information for independent researchers/learners; Users consulted about provision; May be some bilingual provision.
4. As above plus: Staff/volunteers are available for visitors to engage with for at least 40% of the time open or for 30% of the display areas. Generic learning outcomes (GLO) are used to measure learning impact; Modest programme of events, some of which have specific learning goals and

specific target audiences. Some high-tech/ low-tech interactive learning elements to displays; Some learning materials for families/children and or adults (e.g.: trails, guidebooks). Some temporary exhibitions and/or changes to permanent displays. Some bilingual provision.

5. As above plus Regular events and/or exhibitions programme, which includes outreach activities, targets both traditional and nontraditional audiences. Range of learning materials and interactive elements create learning opportunities for all ages and abilities. All the above are produced with the involvement of an education specialist and are evaluated with users. Most communication available bilingually.
6. As above plus Extensive programme of exhibitions, events and activities led by people with specific skills and/or educational expertise. Temporary exhibitions (in house, touring or community based) and programme of events and activities are produced with community involvement. Learning materials in formats appropriate to the needs of minority users. Academic research is published. Opportunities are created for learning about collections not on display. Research is undertaken into the learning needs of all ages and findings are used to inform public programme of exhibitions, events and activities as well as permanent displays. Are a 'learning organisation' as defined in the 'Inspiring Learning for All' framework All communication available bilingually.

Access – Display

1. Basic labelling plus some supporting information (e.g. text, photographs, maps, drawings). Labels hand written or typed, Display not produced "to a professional standard". *
2. Display produced "to professional standard" * but most done more than 10 years ago or up to 10% of displays renewed in the past 10 years but not necessarily "to a professional standard". * No realistic costed plans for revision or renewal.
3. Display produced "to professional standard" * but most done more than 10 years ago or Up to 10% of displays renewed in the

past 10 years but not necessarily “to a professional standard”. * Detailed costed programme for re-display. Temporary exhibitions held to display items for stores or visiting exhibitions. Recent re-display produced without evaluation or user input. May be some bilingual provision.

4. As above plus; At least 10% displayed to professional standard in the past 10 years. Displays changed regularly to trial interpretative ideas/methods. Some aspects have been evaluated. Access and education specialists consulted and advice acted on. Some bilingual provision.
 5. As above plus; At least 25% displayed to professional standard in the past 10 years. Re-display programme has target audiences and input from users taken into account. Some aspects have been evaluated. Access and education specialists involved throughout. Most communication available bilingually.
 6. As above plus; At least 50% renewed in the past 10 years; Both formative and summative evaluation has taken place and results fed back into current displays; All communication available bilingually.
- * To be “to a professional standard” displays should completely meet at least five of the criteria listed in the Spotlight Guidance, or be three quarters of the way to fully responding to all of them.

Access – Disability

1. No awareness of or response to physical, sensory, learning and cognitive impairments and the disabling barriers that exist within the organisation, buildings or services.
2. Assessment by museum staff of potential barriers to physical, sensory and intellectual access.
3. As above plus; A recognised audit checklist used by staff in making an assessment. Some initiatives (e.g. ramps, audio guides, events with sign language) to overcome barriers thus identified. General awareness of implications of Equalities Act. At least one member of staff has undertaken Disability Equality Training during the preceding 2 years.

4. As above plus; Museum manager and key staff have a good understanding of the DDA, Consultation with disabled users and non-users to assess potential physical, sensory and intellectual barriers, costed programme to respond, At least 30% of this achieved, New initiatives (capital or services) fully compliant with Equalities Act, At least 30% staff has undertaken Disability Equality Training during the preceding 2 years. Some bilingual provision.
5. As above plus; Striving to be fully compliant with Equalities Act, Full access audit undertaken with professional auditors in consultation with disabled people, Staged, costed plan to address its findings and at least 40% achieved, Disability Equality Training undertaken in the preceding 2 years by at least 50% staff and plans to extend this to the remainder.
6. As above plus; Fully compliant with Equalities Act, Full access audit undertaken with professional auditors in consultation with disabled people, implemented all recommendations to provide full access for people with physical, sensory, learning and cognitive impairments, Continued consultation with disabled users and non-users and a programme of review of provision and development of further improvements, All staff have undertaken Disability Equality Training undertaken in the preceding 2 years, Programme and budget for regular training updates.

A collection for the nation

Environmental monitoring

1. No monitoring; Obvious environmental problems; Little understanding of issues.
2. No monitoring; Basic understanding of issues.
3. Some monitoring in progress; Equipment adequately stored and calibrated; Basic understanding of issues.
4. Monitoring in place; Conditions required for specialist collections identified; Records maintained and acted on.

5. Monitoring equipment linked to computer in place; Conditions required for specialist collections identified; Records maintained and acted on; Records interpreted.
 6. Monitoring equipment linked to computer and environmental control equipment; Monitoring equipment calibrated regularly; Conditions required for specialist collections identified; Records maintained and acted on; Data informs planning and budget.
3. Planned stores; May still be overcrowded new acquisitions accommodated by packing existing items close together; Safe access to individual objects; Conservationgrade packing for objects at risk; Knowledge of pests and pest traps in use; Store areas cleaned regularly; Arrangements in place for public access to stored collections.
 4. Easy access to individual objects; Conservationgrade packing; Random condition checks; Regular housekeeping; Pest monitoring programme; Separate work space in store
 5. Well organised, internal storage sufficient for current collection; Integrated cleaning/ care programme; Store location records; Vulnerable objects identified; Quarantine for incoming objects; Selective condition checks.
 6. Room for expansion; Housekeeping programme; Integrated pest management; Rolling programme of condition checks; Inert store furniture and materials; Study area.

Environmental control

1. No control; Obvious environmental problems; Little understanding of issues
2. No control; Basic understanding of issues.
3. Some attempt at control; Basic understanding of issues.
4. Dedicated control equipment in place; Equipment maintained; Control maintained for 50% of the time; Conditions required for specialist collections identified.
5. Dedicated control equipment in place used in conjunction with monitoring equipment; Equipment calibrated and programme of maintenance in place; Control maintained for 75% of the time (or more); Conditions required for specialist collections 75% complete.
6. Sophisticated control equipment in place linked to monitoring equipment; Control maintained for 90-100% of the time; Conditions for specialist collections 90% complete; Records maintained and acted on; Data informs planning and budget.

Storage and housekeeping

1. Items not stored in dedicated collection storage space; Little or no cleaning undertaken; Noncollection items kept in object store rooms; No organisation, racking or boxing; No awareness of potential pest problems.
2. Dedicated storage area in use; Awareness of problems or hazards; Overcrowded to the extent that no new acquisitions are being made or severely restricted; No store plan; Occasional inspection for pests; Some cleaning of storage areas.

Display and housekeeping

1. Little or no cleaning undertaken; No awareness of potential pest problems; Poor quality display cases (if any); Overcrowding.
2. Awareness of problems or hazards to objects and visitors; Overcrowding; Occasional inspection for pests; Regular cleaning of public spaces; Display cases clean and modern.
3. Awareness of problems or hazards to objects and visitors; Displays tidy and well organised but can be difficult for staff to access; Conservationgrade display supports for objects at risk; Knowledge of pests and pest traps in use; Some good quality display cases.
4. Easy access to objects; Displays tidy and easy for staff to access; Conservationgrade display supports for objects at risk; Random condition checks; Regular housekeeping; Pest monitoring programme; Good quality, secure, display cases.
5. Well organised, displays for current collection; Integrated cleaning/care programme; Display location records; Vulnerable objects identified; Quarantine for incoming objects; Selective condition checks; Some conservation-grade display cases.

6. Well organised displays; Housekeeping programme; Display location records with photographs; Integrated pest management; Rolling programme of condition checks; Most display cases are conservation-grade.

Documentation

1. Little or no documentation; No SPECTRUM procedures in place.
2. Poor documentation; 50% of core SPECTRUM procedures (i.e. labelling entry and exit records) in place; Major backlogs; No plan or timescale to clear.
3. All core SPECTRUM procedures in use; Documentation plan for backlogs; Retrospective documentation in progress.
4. Core SPECTRUM in use; Retrospective documentation 60% complete; Documentation procedural manual.
5. Wide range of SPECTRUM procedures in use; Retrospective documentation more than 75% complete; Copyright information captured; Staff trained in documentation procedures.
6. As above plus; Full and complete documentation; Collections audit programme; Significance of collections understood and documented**.

SPECTRUM is the UK museum documentation standard. For further information, see the Spotlight Guidance

** See the Spotlight Guidance for an explanation of 'significance'.

Working Effectively

Policy and Planning

1. No forward plan or one which makes no reference to access or public services.
2. Forward plan has either detailed statements or separate policies for at least 4 of the following: admissions policy; collections and research; interpretation and exhibitions (permanent & temporary); programming events and activities etc; learning and education services; access; audience development and marketing; workforce development; publications and communications; customer care; outreach; merchandising and income

generation; Disaster/emergency/business continuity plan.

3. Forward Plan has a statement of purpose, key aims and objectives, specific objectives, spending plan for current year and next year. It also has either statements or separate policies which relate to at least 4 of the above.
4. As above plus; Forward Plan has been approved by governing body; Forward Plan includes at least 8 of the statements or policies listed in range 2. Action plans have been drawn up, in consultation with staff, detailing staff responsibilities, performance indicators and a timetable for regular review; Training implications have been assessed and resources allocated. Forward plan and policies reflect an understanding of 'Inspiring Learning for All'.
5. As above plus; Dedicated budgets for collection care, education, marketing and access improvements; Some feedback from public consultation/market research used in planning; Employment of specialist staff or contracted expertise to plan and deliver services.
6. As above plus; Forward Plan has either statements or separate policies which relate to all aspects in 2. Results of public consultation, evaluation and market research into actual and potential users informs all decisions on development and service delivery; Systematic collection of appropriate data to allow "benchmarking" against other providers.
7. Information about the Inspiring Learning for all framework is available from the Spotlight Guidance.

Staff and volunteer development

1. Neither staff nor volunteers are trained beyond basic induction or introduction to essential procedures.
2. Staff and volunteer training needs are assessed regularly; General awareness of essential procedures and guidelines; General awareness of issues affecting museum operations; Duties only undertaken by trained staff and/or volunteers.
3. As above plus; New staff and volunteers receive full induction; Staff and volunteers are aware of the Museums Association Code

- of Ethics for Museums; Induction available and routinely offered to new members of governing body; Staff/volunteer training needs are assessed; Overall training plan is in place and training is provided; Staff and volunteers occasionally attend external training courses and seminars.
4. As above plus; Current and future training, education and awareness-raising needs are identified for individual staff and/or volunteers; Information on a range of issues affecting the running of museums is available to all staff and volunteers if requested; Temporary staff and volunteers receive basic training in-house; Staff and volunteers occasionally attend external training courses and seminars; Staff are encouraged to report any problems and their comments are acted upon.
 5. As above plus; Dedicated budget available for staff development; Information on a range of issues affecting the running of museums is available to all staff and volunteers in the form of regular, practical training sessions, published literature and in-house documentation. Staff and volunteers regularly attend external training courses and seminars; Training is evaluated.
 6. As above plus; Training needs and provision are regularly reviewed as part of the museum's planning cycle; The museum has guidelines in place on the behaviour of contractors/service providers on site; Museum holds 'Investors In People' status (If IIP is held by the museum's parent body, it must specifically apply to the museum.)
3. Building is wind and watertight; Building robust and all floors can safely support the load; All buildings are visited and inspected regularly (including those normally unoccupied); Plant and equipment is inspected periodically by staff; Potential threats to collections are identified and assessed; Museum has control over (or strongly influences) maintenance of buildings; Essential maintenance carried out; Budget influenced by the museum.
 4. As above plus; Schedule for routine maintenance of building and utilities is in place; A competent person produces regular report on the state of the building; Potential access points for vermin, insects and dust are identified and sealed; Staff responsible for collections are notified in advance of building works.
 5. As above plus; Action plan in place to implement recommendations of regular report; Contractors working on site are briefed about potential implications for collections and are supervised; Benchmarks in Collections Care used as basis to improve conditions.
 6. As above plus; Building management plan is regularly reviewed and recommendations implemented; Reports on building condition are used for planning; Records kept of all building work, maintenance and inspections; A preservation advisory panel or service is consulted in planning any building work.

Provision of suitable buildings

1. Building poorly constructed or in a poor state of repair; Museum is not responsible for, and has no control over, maintenance of building fabric; No planned maintenance or budget; No repairs carried out; Building unstaffed and rarely visited.
2. Building in poor state of repair; Museum does not control maintenance of building fabric but is consulted about limited maintenance; Minimal budget available and not necessarily controlled by the museum; Essential repairs done only as necessary; Seasonally opened building only visited during open period.

Appendix C

Core group of museums which have submitted data for each survey

Aberconwy House	National Roman Legion Museum
Abergavenny Museum	National Slate Museum
Aberystwyth University, School of Art Gallery and Museum	National Wool Museum
Barmouth Sailors' Institute	Nelson Museum & Local History Centre
Bersham Ironworks & Heritage Centre	Newport Museum and Art Gallery
Big Pit: The National Mining Museum of Wales	Old Bell Museum
Bodelwyddan Castle Trust	Oriel Ynys Môn
Brecknock Museum and Art Gallery	Parc Howard Museum and Art Gallery
Carmarthenshire County Museum	Penrhos Cottage
Ceredigion Museum	Penrhyn Castle
Chepstow Museum	Plas Yn Rhiw
Conwy Toll Bridge, Toll House	Pontypool Museum
Cyfarthfa Castle Museum & Art Gallery	Pontypridd Museum
Egypt Centre – Swansea University	Porthcawl Museum
Glynn Vivian Art Gallery	Powysland Museum
Greenfield Valley Museum	Radnorshire Museum
Holyhead Maritime Museum	Regimental Museum of The Royal Welsh (Brecon)
Joseph Parry's Ironworker's Cottage	Rhyl Museum
Judge's Lodging	Robert Owen Memorial Museum
Kidwelly Industrial Museum	Royal Welch Fusiliers Museum
Llandudno Museum	Scolton Manor Museum
Llanidloes Museum	Sir Henry Jones Museum
Lloyd George Museum	St Fagans: National History Museum
Museum of Speed	Swansea Museum
Narberth Museum	Tenby Museum and Art Gallery
Narrow Gauge Railway Museum	Tŷ Mawr Wybrnant
National Museum Cardiff	Wrexham County Borough Museum & Archives