Ariennir gan
Lywodraeth Cymru
Funded by
Welsh Government

Ffederasiwn Amgueddfeydd
ac Orielau Celf Cymru

**The Federation of Museums
and Art Galleries of Wales**

SPOTLIGHT
on Museums
2020

Report for Culture and Sport Division Welsh Government

1. Introduction

In the late summer of 2019, the Culture and Sports Division Welsh Government provided a grant to the Federation of Museums and Art Galleries in Wales, in partnership with Cardiff University, to undertake the fifth detailed Wales Spotlight on Museums survey. Previous surveys were completed in 2015, 2011, 2006 and 2002.

This report presents the findings of the 2020 survey and explores trend data since 2002. Data was drawn from the previous fiscal year, in this case 2018/2019.

The survey was launched in March 2020 just days before the first coronavirus lock down. Despite the operational difficulties caused by the pandemic, museums submitted their responses when they could access their facilities.

Thanks to all the museums that completed the survey.

2. Summary

Response rate

- Welsh Government estimated in the 2011 Spotlight that there are some 160 organisations in Wales which could be called a museum or call themselves a museum.

- In 2020, 85 museums responded to the survey giving a 53% return which is slightly higher than the number of respondents in 2015.

- The return rate for Accredited or museums classified as "Working towards Accreditation" was 78% or 83 of 106 Accredited museums responding.

- At least 40 of the 160 museums have never submitted data to Spotlight surveys.

- Trends are based on responses from a core group of 50 museums which have responded to all the previous surveys.

Standards of Practice[1]

- Standards have declined in general since 2015. There is some evidence to indicate that the falls are related to public sector austerity.

- Most museums still exceed the minimum standards required by the UK Museum Accreditation Scheme.

- Standards in Provision of a suitable buildings (maintenance & management, F1) and Audience development and Marketing (F9) have improved since 2015.

- The provision of both Informal learning (F11) and Formal learning (F12) fell.

Successes and challenges

- Since 2015 major lottery funded redevelopments have happened at Brecon, Swansea, Penmaenmawr, Pendine and Holywell.

- St Fagans National Museum of History was awarded the Art Fund Museum of the Year in 2019.

- Abergavenny Museum was the winner of the Women's History Network Community Prize 2017.

- Rhondda Heritage Park gained the Sandford Award from the Heritage Education Trust, in recognition of their outstanding education programme.

- The Museum of Cardiff was winner of the Museums Association Museums Change Lives Award 2019 amongst a string of quality and innovative awards.

- The challenges were mainly budget and capacity issues, with museums operated by Bodelwyddan Castle Trust and Kidwelly Industrial Museum Trust closed permanently.

Museum opening hours

- 56% (48) of respondents were open all year.

- 36% (31) of respondents were open seasonally.

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[1] The criteria for assessment are a number of qualitative "Range Statements" that museums select to most closely match their situation.

Audiences

- There were 4,688,055 visits to all responding museums in Wales in 2019. This was a substantial 22.9% increase from the 2015 figure of 3.8 million.

- Visits to local museums (non-Amgueddfa Cymru and non-National Trust) rose by 31.2% during the same period.
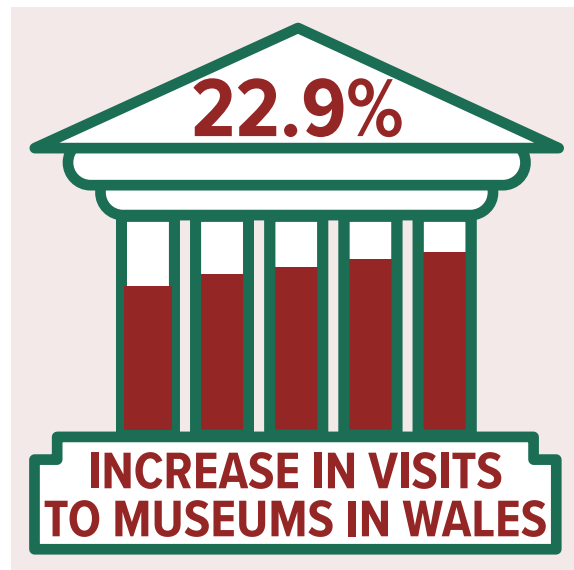
Economic impact

- The economic impact of visits to museums in Wales in 2020 was £134,128,106.

- The smallest museum with only 200 visitors contributed nearly £4,000, while the group of National museums contributed £83 million. National Trust sites based on the local visitor spend contributed at least £17million to the Welsh economy.

Online engagement

- 95% of museums have their own websites and 87% use social media platforms.

- In the 2020 data, visits to museum websites are reported at 3,276,836. This is a 15% drop from the 2015 data. However, social media subscribers/ followers have increased from 236,293 to 591,808, representing a 150% increase in social media engagement.

Educational engagement

- Museums provide 32,957 learning sessions and activities engaging 947,560 participants.

- Welsh museums run 2,780 outreach sessions with 121,381 participants.

22.9%

INCREASE IN VISITS TO MUSEUMS IN WALES

WELSH MUSEUMS' ECONOMIC CONTRIBUTION

£134 MILLION

TO LOCAL ECONOMIES

150% INCREASE IN WELSH MUSEUMS' SOCIAL MEDIA ENGAGEMENT

Wellbeing

- 52% of Welsh Museums offer dementia friendly activities.

- Only 20% of Welsh museums are asked to supply data to their local authority/public body as part of Wellbeing of Future Generations Act reporting.

- 27% of museums participate in the Fusion programme.

Museums and equalities

- Nearly all museums run inclusive programmes such as exhibitions, events and activities representing Wales' diversity. This broadly includes different age related, LGBTQI, Welsh language users and learners, women's groups, diverse religions and belief groups, disabilities, Black, Asian and minority ethnic communities.

A Collection for the Nation

- Museums in Wales care for 6,275,185 objects.

- An increasing number of museums, 61%, report that their stores are overcrowded. A further 27% of museums have stores that will be full by 2026.

- Only 32% of museums report a significant proportion of their collection is available online.

- 12,084 items were acquired by museums either by purchase or gift, a small decrease since 2015.

Financial operations

- Over half of the museums in Wales provide free entry.

- The total annual budgets of all responding museums is over £40 million.

Volunteers

- In 2020, 4,235 volunteers work in museums, up 6% from Spotlight 2015.

- Volunteers contribute 404,676 hours, a 128% increase from 2015.

Workforce

- 5,841 people work in museums in Wales, slightly less than in 2015.

- 1,606 are paid staff in museums which equates to 991 Full Time Equivalents.

72% OF WELSH MUSEUMS' WORKFORCE ARE VOLUNTEERS

Local Museums and Amgueddfa Cymru

- 59% of local museums that responded to the survey, say they access services provided by Amgueddfa Cymru.

- Small local authority or independent museums are most likely to access these services.

SPOTLIGHT

3. Survey method and process

The charts and tables below follow the established format used in the 2015 Spotlight report[2] to allow for easy comparison. All the data from previous surveys is in the format supplied by previous consultants.

Comparators with historic information is based on the data sets as collected in previous surveys. Where the total responses in 2020 (85) are compared with responses from 2015 (80), overall totals (such as number of staff working in the sector) have limited comparative value. Benchmark trends in practice can be compared (Range Statements) as the 2020 replies simply provide a more representative picture.

For the purposes of analysis, a 'core' group of museums has been used for quantitative and cumulative data as this group represent those museums which have replied consistently through the survey process.

As with the 2015 Spotlight, this builds on data collected in 2011 and 2006 as well as the 2002 Museum Mapping exercise.

This survey was conducted on-line from March 2020 to April 2021.

Data on Spotlight 2020 is being made available in two ways:

- Printed report – available to download from the Federation of Museums and Galleries of Wales and Welsh Government web sites

- Excel spreadsheet available on application to the Federation of Museums and Galleries of Wales

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

- Yes/No questions

- Numerical evidence questions

- Free text questions

- Self-assessment questions (Range Statements) to measure levels of practice.

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[2] https://gov.wales/sites/default/files/publications/2019-08/spotlight-on-museums-2015.pdf

4. Sample and response

There were 106 Accredited museums or Working towards Accreditation in Wales, in 2020. Other organisations can describe themselves as museums, as the term is not protected. In Wales there are approximately 160 organisations using the term museum and all those who might be considered a museum were given the opportunity to respond to this survey.

- The formal recognition process and protected term for museums is an 'Accredited Museum': this describes a museum matching UK industry standards of accountability, governance and service.

- 83 of the 85 respondents are accredited museums, representing 78% of Welsh accredited museums and 53% of all 160 organisations that describe themselves as museums.

- Of those 160 museums, 40 do not meet the "working towards accreditation" criteria and have never participated in Spotlight.

In future it might be more accurate to consider the data in terms of the 120 museums in Wales that could reach the Accreditation standard and meet the UK definition of a museum in full.

- Only two non-Accredited museums responded. One is part of a local government service, the other a specialist public service museum. Both are eligible for the status of "Working towards Accreditation".

- Not all museums answered all the questions.

- The core group refers to the museums that have responded to all four Spotlight surveys.

- The core group has reduced from 73 in 2006 to 51 in 2020.

- Data relevant to budgets is indicative as different accounting methodologies are used in different museums.

- For multi-site organisations where a museum service provides central support to a number of museums, responses have been aggregated.

5. Categories of museum

Three main categories of museum are used for analyses throughout the report: Type, Size and Core group.

- **Type** of museum is determined by funding source and governance model.

- **Size** of museum is determined by annual visit figures. Large museums attract over 50,000 visitors. Medium sized museums between 10,000 and 50,000 visitors. Small museums attract on average fewer than 10,000 visitors.

- **Core group** – museums which responded to the survey in 2002, 2006, 2011, 2015 and 2020.

Author and museum curator Mark Lewis with the performers of *For As Long As Forever Is* at Tenby Museum and Art Gallery

Janet Lewis of the Friends of Tenby Museum, said "Thank you, Mark, for narrating the life and works of Dylan Thomas with the same love of words that Dylan himself had, and to all the marvellous performers for bringing those words so brilliantly to life" with one member of the audience stating that it was "Better than the BBC!".

Image courtesy of Tenby Museum and Art Gallery ©

6. Profile of respondents

Types of museum

Respondents have been divided into four types of museum depending on funding arrangements and governance.

- **National Museums** funded by Welsh Government
- **Local authority museums** funded and operated directly by local authorities
- **Independent museums** funded and run independently of local or national government, but may receive support through grants or advice from government
- **National Trust** properties

The core group remains broadly representative of the type of respondents as a whole but may need to be reconsidered for future projects. The next survey could possibly look at a core group who have replied in the last three surveys (2011, 2015 & 2020) so that data will span a period of approximately 12 years, which should still allow for a meaningful analysis of trends.

Figure 1: Responses by Type of Museum

Type of museum
- Amgueddfa Cymru
- Local Authority
- Independent
- National Trust
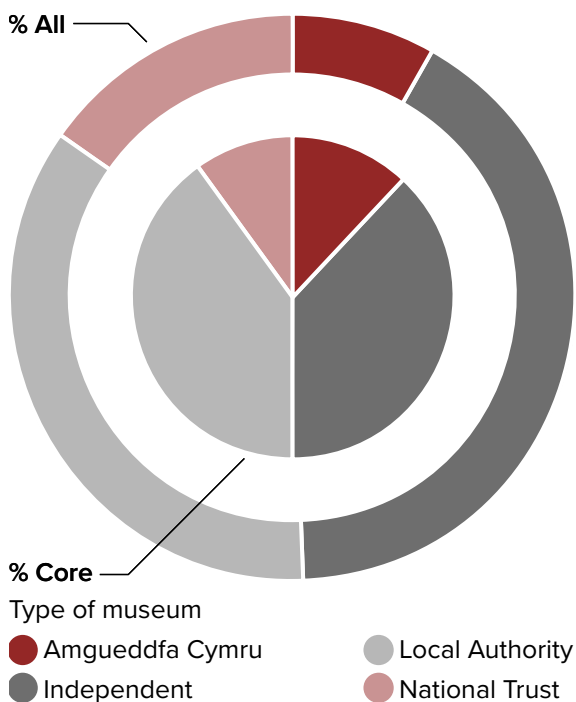
Size of Museum

Museums in Wales range from large national museums (Amgueddfa Cymru) to small community museums. For the purposes of this report, the size of museums has been determined by the average annual number of visits they attracted between 2015 and 2019.

- **Large**: 24 museums attract, on average, over 50,000 visits per year
- **Medium**: 27 medium sized museums attract an average of between 10,000 and 50,000 visits
- **Small**: 34 small museums attract an average of fewer than 10,000 visits annually

Figure 2: Responses by Size of Museum

- Large
- Medium
- Small
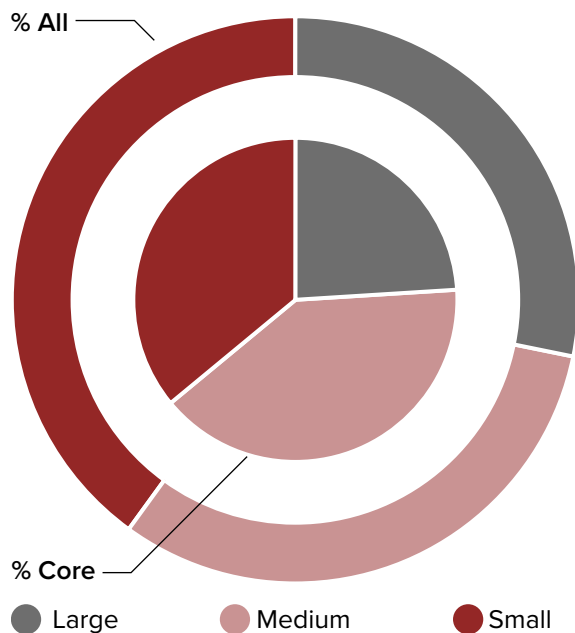
Accreditation

Accreditation is a voluntary scheme administered in Wales by Welsh Government, open to any eligible organisation which meets required standards. The scheme sets UK national 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 preserve artefacts or specimens for public benefit are encouraged to support the scheme.

- In 2015 only three non-Accredited museums responded, so comparisons between Accredited and non-Accredited museums were abandoned as not being statistically valid.

- In 2020 only two non-Accredited museums responded so comparisons are not statistically valid.

- It is recommended that any future Spotlight is only distributed to Accredited and "Working towards Accredited" museums for a more specific and targeted response.

Monmouthshire Women Making Change, Abergavenny Museum (Winner of 2017 WHN Community Prize)

The project used collections and local stories, to demonstrate and understand the value of women's campaigning. We explored the contribution local women made to Suffrage, the War effort, agriculture, the Peace Movement. The exhibition was curated by an intergenerational group of volunteers – a recent History graduate, two university students and a member of the community. We worked collaboratively with community organisations. Our aim was to encourage, particularly young women, to become engaged in campaigning and inspired to take action today.

Image courtesy of Monlife Heritage ©

7. Standards of Museum Practice – Range Statements

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. These are broken 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. Museums should aspire to reach the highest level most appropriate for the size and scale of their organisation.

- There has been a tendency across the board for the scores to have gone down since 2015.

- Several of the range statements are time bound, for example "have you invested in new displays in the last three years".

- Due to the impact of austerity measures scores may drop. For example, although the museum had previously invested in new displays and the interpretation was still attractive and relevant, there had not been any recent investment; a survey may have been undertaken and acted on, but it has now timed out; if a Learning Officer has not been replaced in the interim that museum drops down a grade.

The Areas of Work Range Statements

F9	Audience Development and Marketing
F12	Formal Learning
F11	Informal Learning
F10	Access – Display
F13	Access – Disability
F8	Staff and Volunteer Development
F1	Provision of Suitable Building
F2	Environmental Monitoring
F3	Environmental Control
F4	Storage and Housekeeping
F5	Display and Housekeeping
F6	Documentation
F7	Policy and Planning

Figure 3: Overall average levels of practice since 2002 across all museums
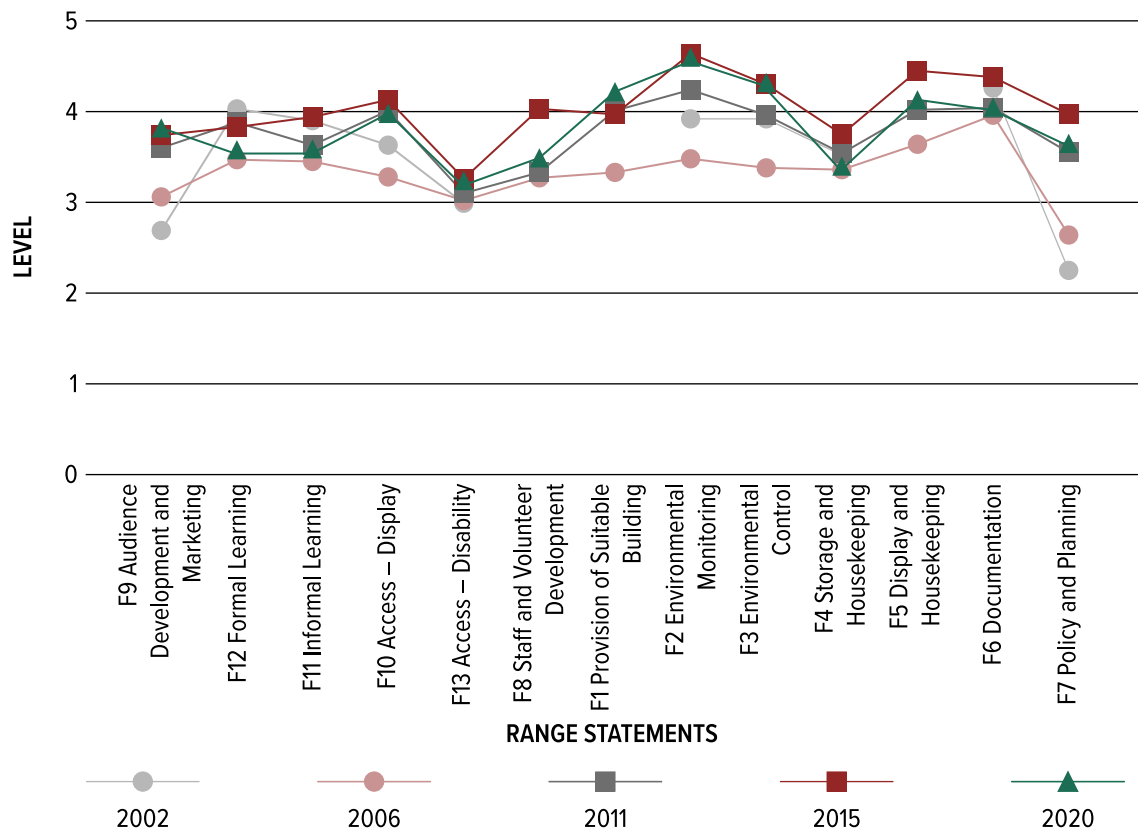

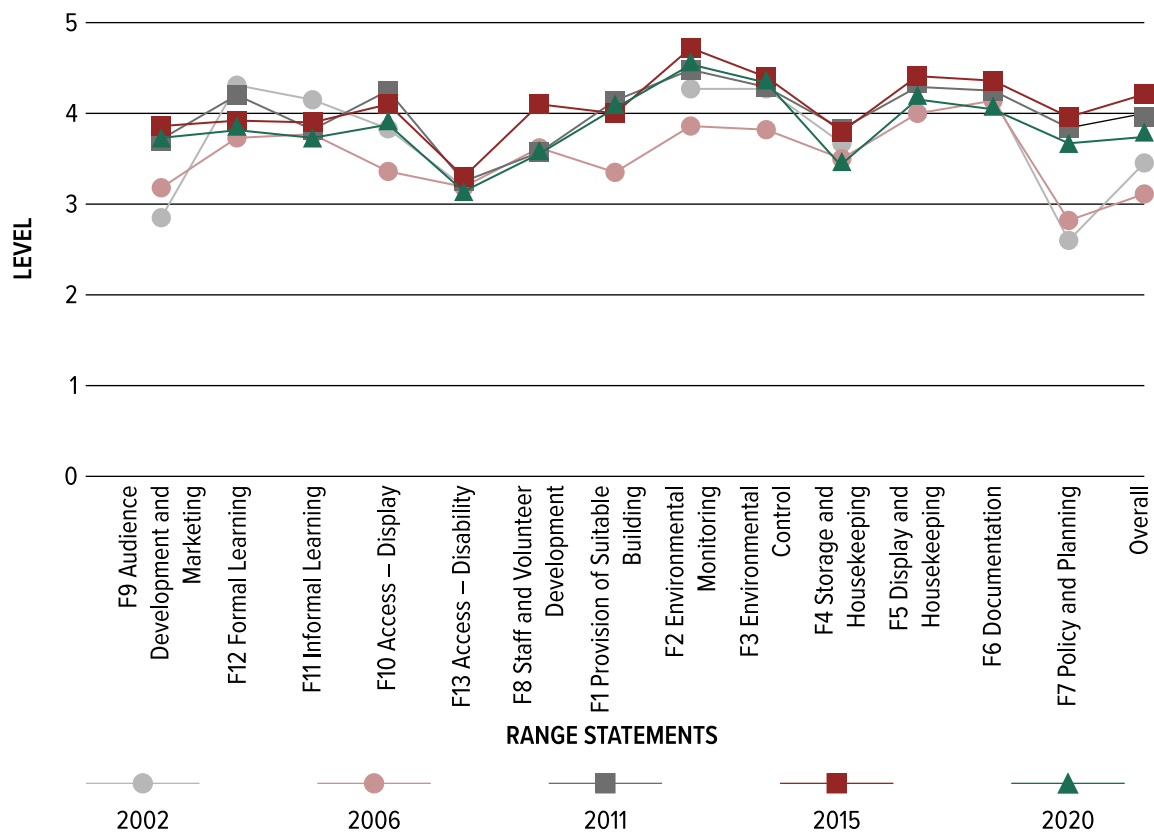*Figure 4: Overall average levels of practice since 2002 across core museums*

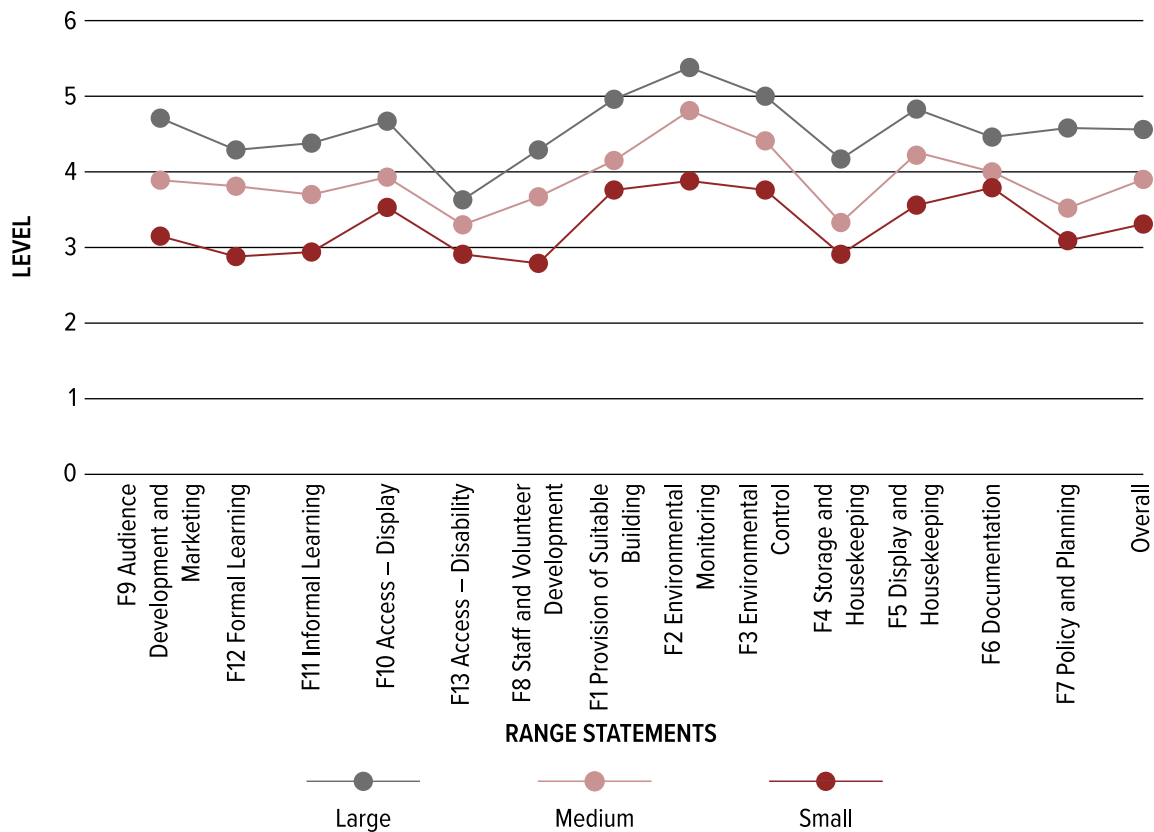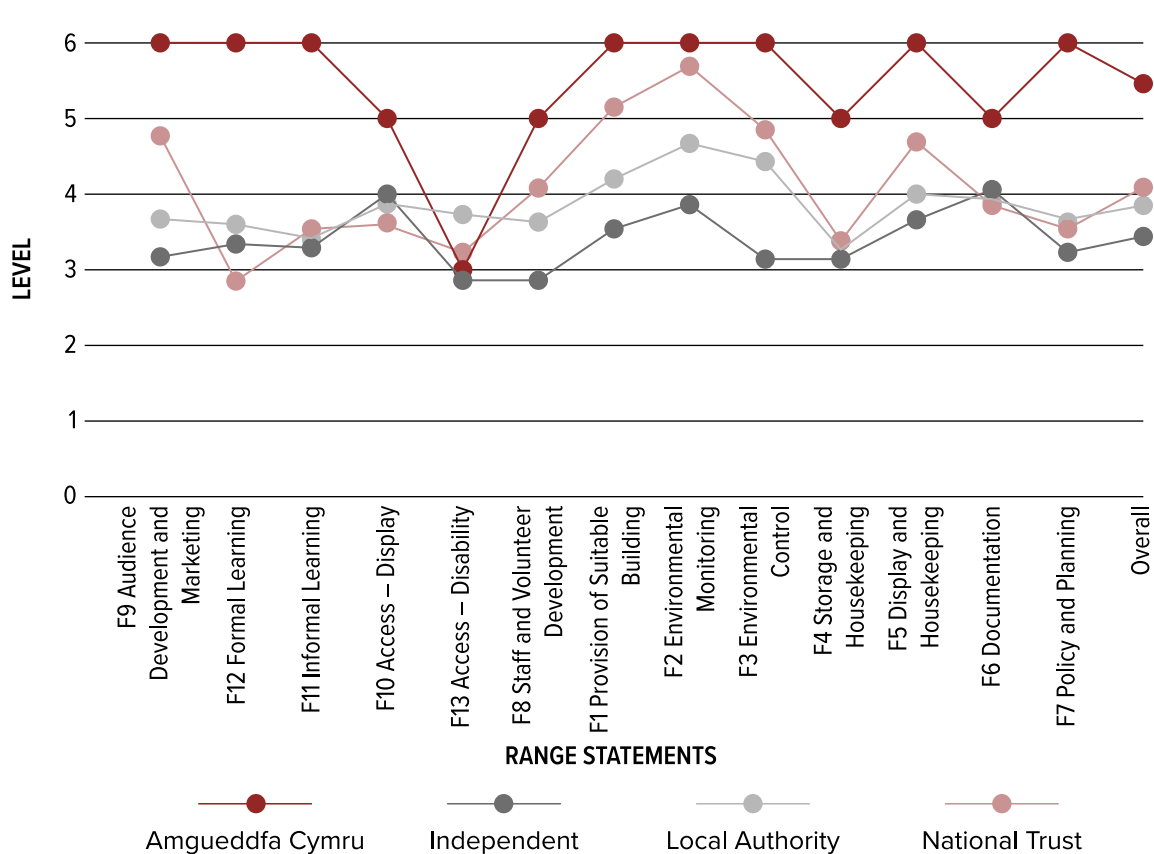Figure 5: Average levels of service by size of museum

Figure 6: Average levels of service by type of museum

8. Success and Challenge since 2015

Museums were invited to state what they felt were their main successes since 2015 and what challenges they would be facing.

Successes

All types of museums cited exhibitions amongst their successes. Specific highlights mentioned include: the Welsh Government's Sharing Treasures Partnership Scheme; the Saving Treasure -Telling Stories partnership between the National Museum of Wales and the Welsh Federation of Museums, funded by the Heritage Lottery Fund (NLHF); and the Royal Commission on the Ancient and Historical Monuments of Wales WW1 U-Boat project. All these and others provided museums with additional funding opportunities, helped forge partnerships with community groups and develop new audiences.

- The overall increase in visitor numbers was attributed to the range of exhibitions, events and activities that most museums engaged in. Many of those cited were funded by external sources from HLF (NLHF), European funding, the Esmée Fairbairn Foundation to the V&A/Art Fund.

Victoria Rogers, Winner of the Museums Association's Radical Changemaker Award

The Museum of Cardiff was shortlisted for two Museums Association awards in 2019 - Best Small Museum Award for their dementia friendly programme and Radical Changemaker for their Manager Victoria Rogers. The judges reflected that the Museum of Cardiff was *"...such an open, community-driven place"* and their dementia friendly programme was *"extraordinarily impressive"*. Winner Victoria was commended for *"putting social impact at the core of everything she does. She has [...] changed the museum's visitor profile by engaging more diverse audiences and worked with people in the local area to explore challenging aspects of the city's history"*.

Image courtesy of The Museums Association ©

- Exhibition themes included the commemoration of the sacrifices of WW1, ancient treasure found by detectorists and farmers, the Welsh links to slavery and Wales and Japan.

- There were major redevelopments funded by the lottery at Brecon, Swansea, Penmaenmawr, Pendine and Holywell.

- Several museums were proud to attain Accreditation success, which recognises their commitment to collection care and management, organisational resilience through forward planning and actively striving to reach new audiences.

- Several independent voluntary managed museums celebrated ownership of their museum buildings through the Capital Asset Transfer Scheme, including Newtown Textile Museum and The Judge's Lodging Presteigne.

- Tenby Museum's Dylan Thomas performance evening was described by audience members as "better than the BBC".

- The Egypt Centre had "Lots of Awards", including Winner of the Swansea Life tourism award, 2018 and 2019 and Winner of the Queen's Award for Voluntary Service 2018.

- St Fagans National Museum of History was awarded the Art Fund Museum of the Year in 2019.

- Abergavenny Museum was the winner of the Women's History Network Community Prize 2017.

- Rhondda Heritage Park gained the Sandford Award from the Heritage Education Trust, in recognition of their outstanding education programme.

- The Museum of Cardiff was winner of the Museums Association Museums Change Lives Award 2019 amongst a string of quality and innovative awards.

- Newly Accredited Museum of Modern Art, MOMA, Machynlleth in 2019 was recognised by The Guardian as one of the best 10 rural art galleries.

Challenges

Austerity matters and the lack of resources were significant challenges. However, the responses to Spotlight were collected in 2020 and the first half of 2021, during the COVID pandemic. Therefore, the main concern for the majority was recovery post-pandemic and how to survive falling audiences, recruit new volunteers, cope with even tighter budgets, and cuts in service provision. This report shows that museums had developed and grown new audiences despite the austerity measures in place and had used innovative funding streams to do so. These gains were swept away during the pandemic and for many museums. "Building our visitor base up again after a prolonged period of closure and then very limited opening," were the key concerns. However, museums operated by Bodelwyddan Castle Trust and Kidwelly Industrial Museum Trust closed permanently.

9. Museum opening hours

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

- 56% (48) of respondents were open all year

- 36% (31) of respondents were open seasonally

- 3.5% (3) of respondents were only open by appointment

- 3.5% (3) of respondents were closed for repairs or redevelopment

The Museum of Land Speed at Pendine

The new passive designed Museum of Land Speed under construction in 2019 managed by Carmarthenshire County Council as part of the £7.6m Pendine Attractor project opening in 2023. The new museum is located within a complex including eco-hostel and café, play and events area, mobile home parking, and accessible accommodation and Changing Places toilet.

Image courtesy of Carmarthenshire County Council ©

10. Audiences

To meet standards and the expectations of current users, museums must be accessible and welcoming organisations. They should understand their users and meet the needs of a range of users with differing requirements. Engaging everyone is key and by working with communities, reducing barriers to access, providing for tourists and through creating learning and volunteering opportunities they can meet their goals. Museums must demonstrate that they are a relevant and active part of the cultural offer available in Wales.

The number of actual physical visits to museums is one of the main indicators of how successful a given museum is and the level of its popularity with the public. It is a key indication of success. However, visitor number must be seen in the context of the size and scope of a museum.

Museums are a key component of the tourism offer in Wales and research has shown that visitors, both staying and visiting on a day basis, give museums as one of the main reasons for their visit.

- The analysis of visitor numbers uses two sets of figures. Averages are based on all responses received, while totals are based only on museums which supplied visitor numbers for all years from 2015-2019.

- Total visits to responding museums rose during the period by 22.9% to 4.69 million over the period. Visits to the core group also rose, but not quite as much at 20.7%, to 2.82 million.

- The overall result disguises some significant variations between different types of museum. The highest visitor figure was a little under 600,000, while the lowest was under 1,000.

- Visits to local museums (non-national and non-National Trust saw the biggest increase by 31.2% to 1.59 million. Visits to Amgueddfa Cymru also rose, by 19% to 1.95 million. Visits to National Trust properties also rose, by 19.1% to 1.16 million.

- These figures reflect a complex picture, highlighting that visit numbers do not always increase year on year and fluctuations are normal. A whole range of both negative and positive factors are involved. A long-term view of visitor trends is important rather than a simplistic year by year comparison.

- Not surprisingly, museums with higher visitor numbers tended to deliver higher levels of service, a pattern that was consistent across all range statements. Museums with larger visitor numbers usually have the greatest level of staff, capacity, and resources.

- Museums were also asked to confirm if the visitor numbers supplied were actual or estimates. The responses from individual museums varied from year to year over the period but between 71% and 81% of museums record actual visitor numbers on a yearly basis.

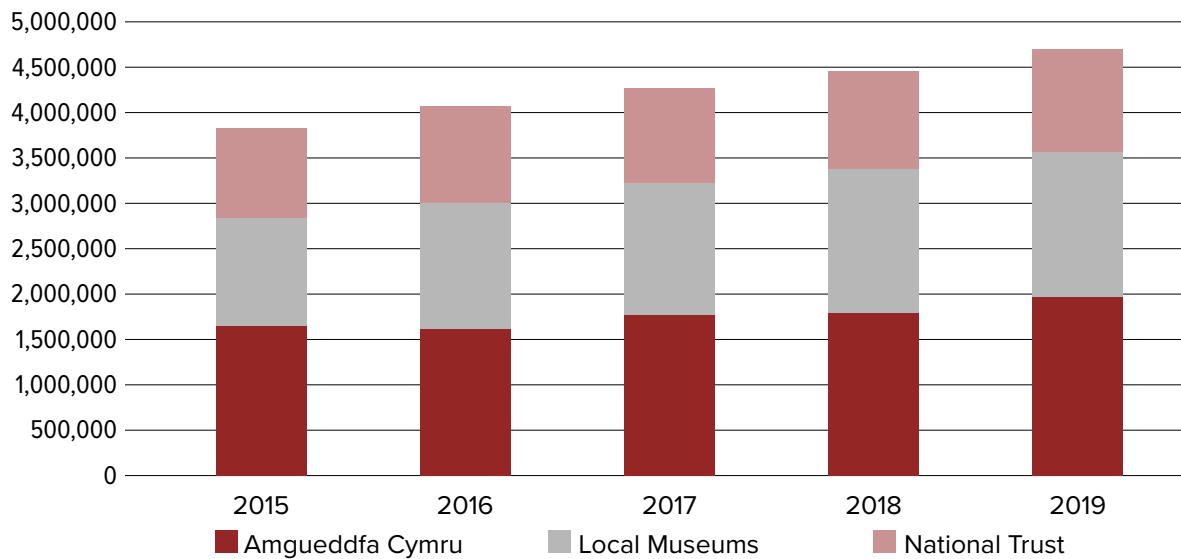*Figure 7: Total visits to all museums 2015-19*

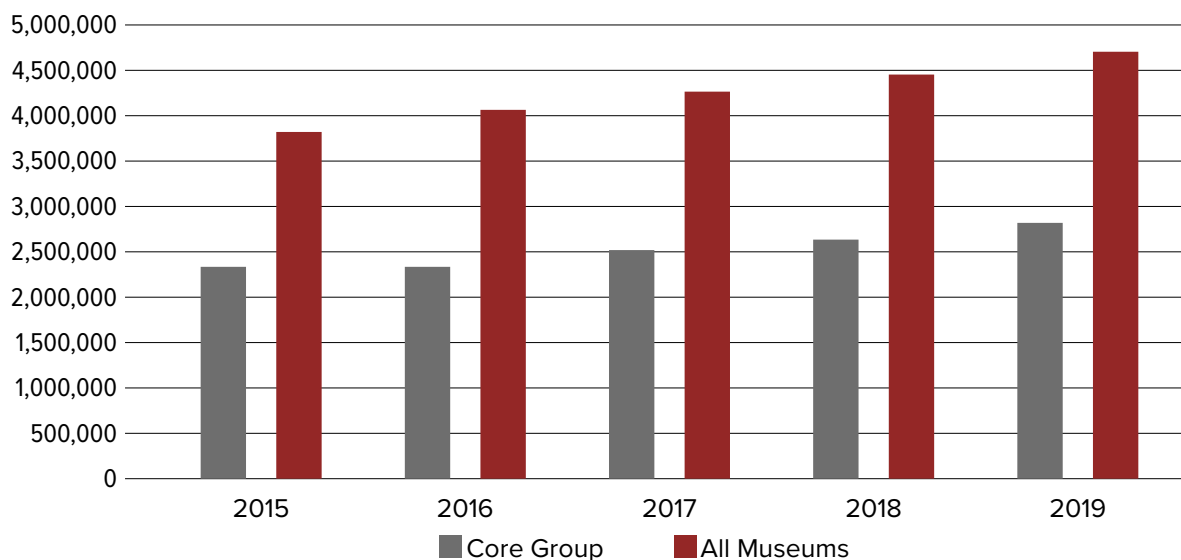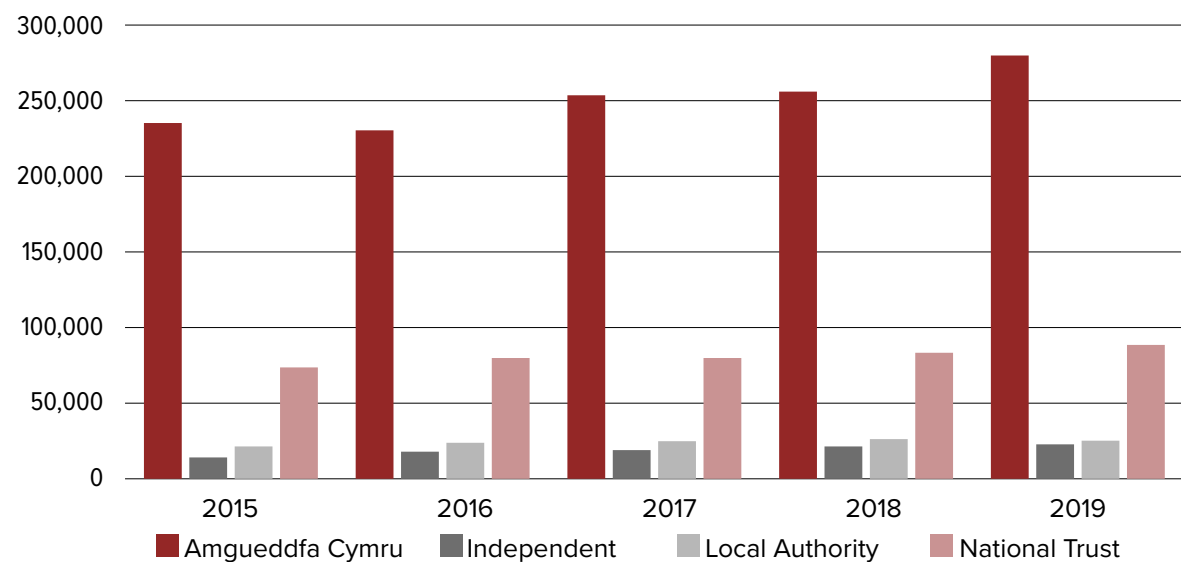*Figure 8: Total visits to all museums and core group 2015-19*

Figure 9: Average visits by type of museum

11. Economic Impact of visits to museums

Museums make an important contribution to the Welsh economy as well as a museum's local economy. They attract both local people and tourists and drive visitor spend. This spend benefits other business, particularly in the hospitality industry and accommodation providers. The 2015 report, using the data supplied by museums, calculated economic impact by utilising The Association of Independent Museums Economic Impact Toolkit. The AIM toolkit[3] was updated in 2019. The toolkit provides visitor formulas, a goods and spends formula, and an employment formula. It helps museums express the impact of visits to their museum in terms of economic value.

- Using the toolkit, the gross economic value in 2014 was calculated at £82,780,467

The toolkit was revised in 2019, but unfortunately only eight museums used it to determine their contribution and impact on their local economy in Spotlight 2020. To get an estimate of the overall contribution museums make to the Welsh economy, we calculated visitor spend using only the AIM toolkit's local visitors x spend formula from the county tables

provided. We did not include the goods formula or the employment formula. We have also used the visitor formula as though all the visitors were locals rather than taking a proportion as day visitors or overnight visitors both of which spend more[4]. This avoided the guess work on the percentage breakdown of visitor types. This gives a base line conservative figure, which is indicative of the minimum economic contribution museums make.

- The eight that used the full toolkit, showed that between them, they had contributed £10,884,319 to their local economies.

- Adding the basic estimates with those completed by the eight museums we get a total visitor spend and economic contribution of over £134 million for Spotlight 2020.

- The smallest museum with only 200 visitors contributed nearly £4,000, while the group of National museums contributed £83 million. National Trust sites based on the local visitor spend contributed at least £17million to the Welsh economy.

[3] https://www.aim-museums.co.uk/wp-content/uploads/2019/10/Economic-Impact-Toolkit-2019.pdf

[4] The visitor spend figures for Pembrokeshire for example give a local visitor spend of £17.26, a day visitor, £34.53 and an overnight as £53.83

12. Online engagement

The survey asked whether museums had their own website. The question was a simple yes or no, so there was not qualitative data regarding size and quality of information, particularly regarding collections. They were also asked to provide data on visitors to their website. They were also asked about social media and number of subscribers/followers to different social media platforms.

- 95% of museums had their own websites and 87% used social media platforms. However, the figures were slightly down on the 2015 Spotlight.

- Figures for visits to websites at 3,276,836 was down from 3,871,624 in 2015, while social media subscribers/ followers were up from 236,293 to 591,808, a more than double increase.

Fig 10: Average number of website visitors by museum size in 2018/19
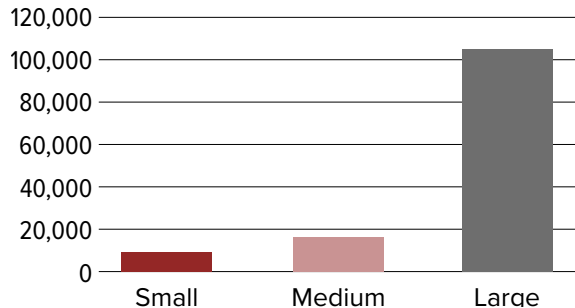
Visits to large museums websites are considerably down on 2015. There are several possible reasons, which may be skewing the results for 2015. Searches today for basic information like opening times or admission fees are "intercepted" by search engines that offer that information without the need to visit the museum website.

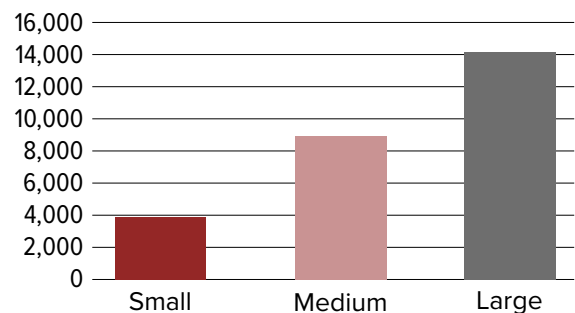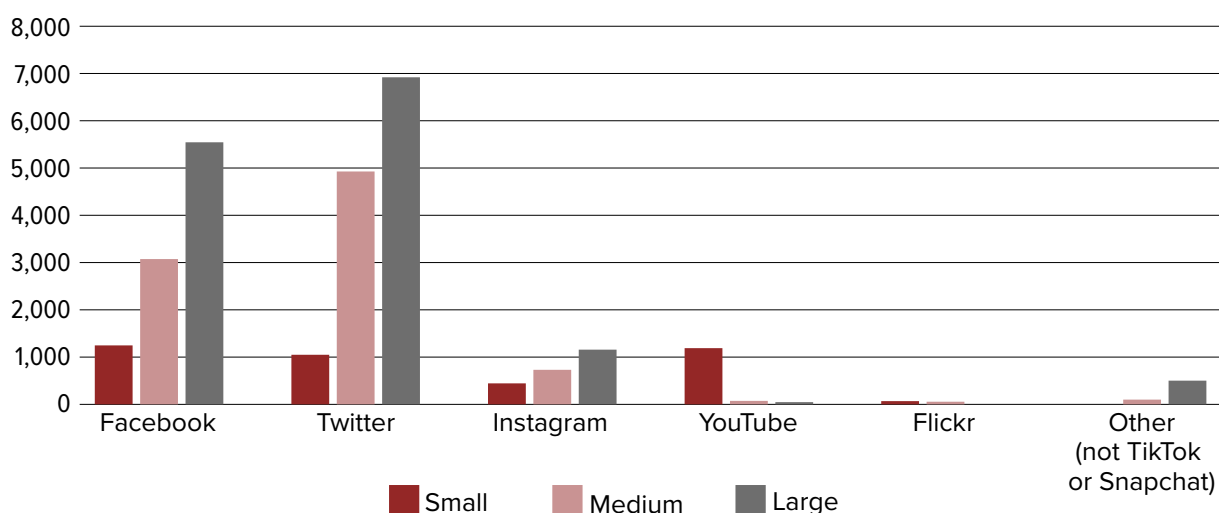*Fig 11: Average number of social media subscribers by museum size in 2018/19*

Fig 12: Average number of social media subscribers by museum size in 2018/19

13. Educational Engagement

Museums were asked to provide data on the number of sessions and participants across formal and informal learning activities. Learning and education are important functions of all museums.

Table 1

	2020	2015
Formal sessions	10,994	8,071
Participants	299,655	318,319
Informal sessions	21,963	3,622
Participants	647,905	314,253
All sessions	**32,957**	**11,693**
Figure shown in the 2015 report not supported by the raw data		11,597
All participants	**947,560**	**632,572**
Figure shown in the 2015 report not supported by the raw data		625,578

We have re-examined the raw data provided for the 2015 returns. We re-calculated the totals by summing the raw data for museum type. We created different figures for 2015 than reported. We have shown our totals in black above and the numbers quoted in the 2015 report in red above.

- Museums provided 32,957 learning sessions and activities which engaged 947,560 participants in Spotlight 2020.

- Although more formal learning sessions were held in 2019, the numbers of participants fell compared to 2015. However, the number of informal sessions and participants was very much higher in 2019 than 2015.

- The increase in informal learning sessions may reflect financial changes with reductions in core funding for formal teaching being replaced by grant-aided learning and access projects and activities.

Figure 13: Average service levels of learning provision by type of museum
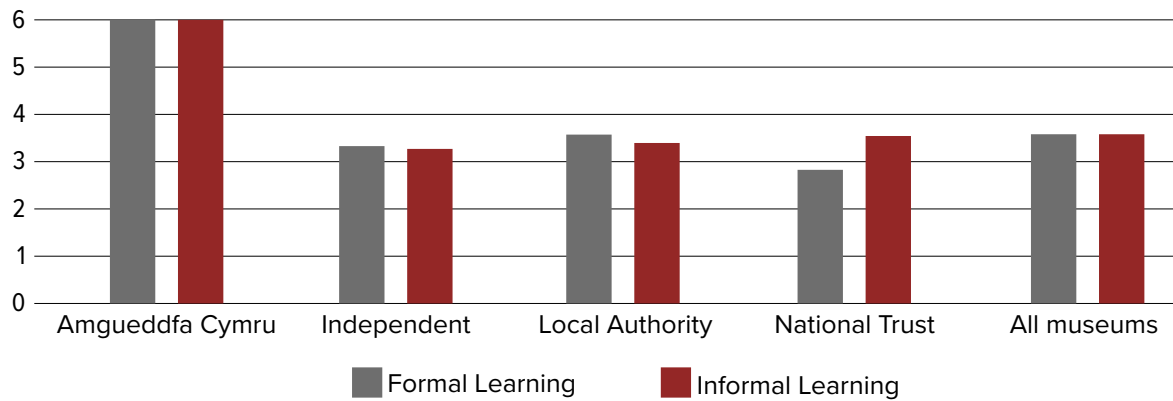
Figure 14: Average service levels of learning provision by size of museum
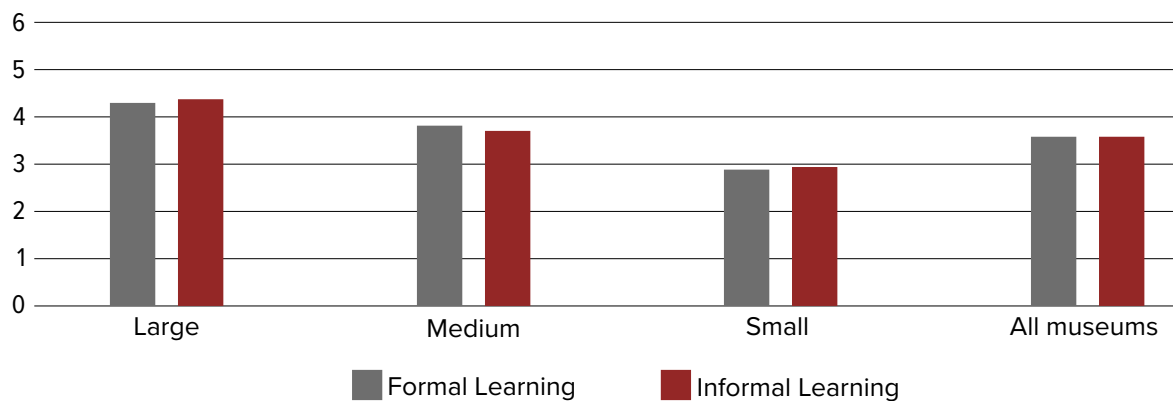
13.1 Educational outreach

Many museums provide learning activities outside the museum, often in the heart of communities. Not all communities have easy access to the museum building and outreach is an opportunity for the museum to reach out and engage these communities.

- Welsh museums ran 2,780 outreach sessions in 2020 involving 121,381 participants

- While the number of sessions were up in 2015, participants were slightly down

- 32 museums, 38% of all respondents, did not deliver any outreach activities

Table 2

	2020	2015
Offsite sessions	2,780	2,419
Participants	121,381	124,992

14. Wellbeing

The Wellbeing of Future Generations Act and its key goals underpins Welsh Government's Programme for Government and is a key element of the policy framework that public bodies work to. The Act recognises that health and wellbeing is not just a role for the primary care sector but for a range of providers including museums. Several questions were inserted into Spotlight to look at the contribution museums were making to wellbeing. Unfortunately, only 13 museums reported using the UCL Museum Wellbeing Measures Toolkit. However, those that did were able to all show an improvement in their visitor's wellbeing. Some reported improvements as high as 42% with the majority around the 20% position.

- 23 museums are involved in the Fusion programme in their areas, which is 27% of respondents

- 44 respondents or 52% of Welsh Museums offer dementia friendly activities

- Only 20% of Welsh museums have been asked to supply data to their local authority/public body as part of Wellbeing of Future Generations Act reporting

Three Carmarthenshire Treasure Finds

Two rings and a Bronze Age hoard from Kidwelly were acquired through the all-Wales *Saving Treasures; Telling Stories* NLHF-funded project. The project was a partnership between the Federation of Museums and Galleries of Wales and Amgueddfa Cymru-National Museum Wales. The photograph shows a Post-Medieval gold posy ring, Llangyndeyrn Community. Posy rings were popular love tokens and were often exchanged as betrothal or wedding gifts. The inner face of this late 17th or early 18th century example is engraved with the legend + I · AM · EVER · ONE.

Image courtesy of Carmarthenshire Museum/Amgueddfa Cymru - National Museum Wales ©
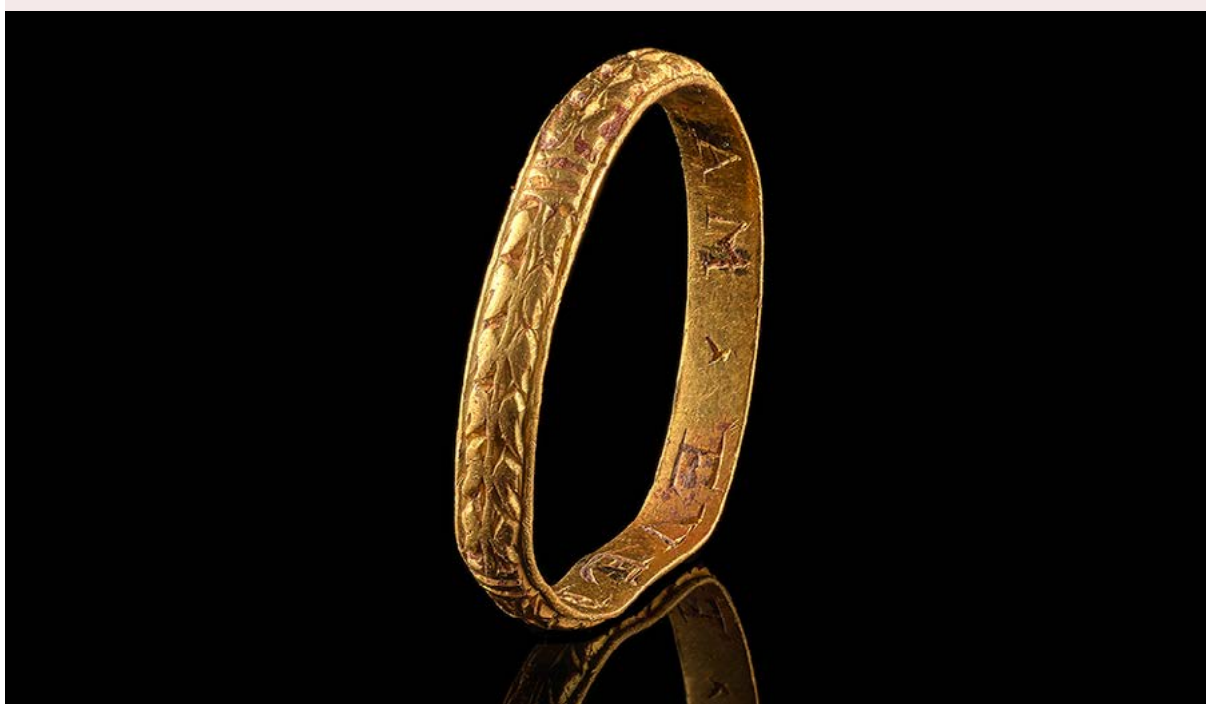
15. Museums and equalities

Museums have an important role in supporting equality, not only in society but through their audiences, collections, organisation and workforce. Museums can address equalities through targeted exhibitions, events and programmed activities. Museums were asked if they had provided for 14 identified equality areas and 78 responded positively. Of the seven that did not provide anything specific, one was an off-site store only and several were closed for refurbishment or other reasons.

- Nearly all museums ran targeted exhibitions, events or activities for groups including different age related, LGBTQI, Welsh language users and learners, women's groups, diverse religions and belief groups, disabilities, Black, Asian and minority ethnic communities.

15.1 Museums and access audits

Museums were asked if since the 2015 Spotlight survey has the museum carried out an access audit with formal report and recommendations. In 2015, 67% of museums had carried out a full access audit, but only 40% had carried out one in the past 3 years. This fell to 30% in 2019. The Accreditation standard requires museums to carry out a full access audit every five years, so this is a significant issue.

Yes **30.6%**

No **51.8%**

Don't know **17.6%**
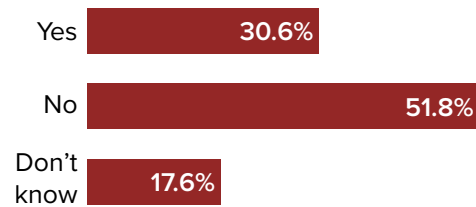
Figure 15: Provision for different equality areas by type of museum

Gender/Transgender

Sexuality

Women

Religion or Belief

Disability

Race or Ethnicity

Age General

Age Older 60+

Age 0-5 Years

Age Young People (16-25)

Welsh Speakers

Marriage/ Civil Partnership

Pregnancy/ Maternity

Former Communitites First Areas

- Amgueddfa Cymru
- Independent
- Local Authority
- National Trust
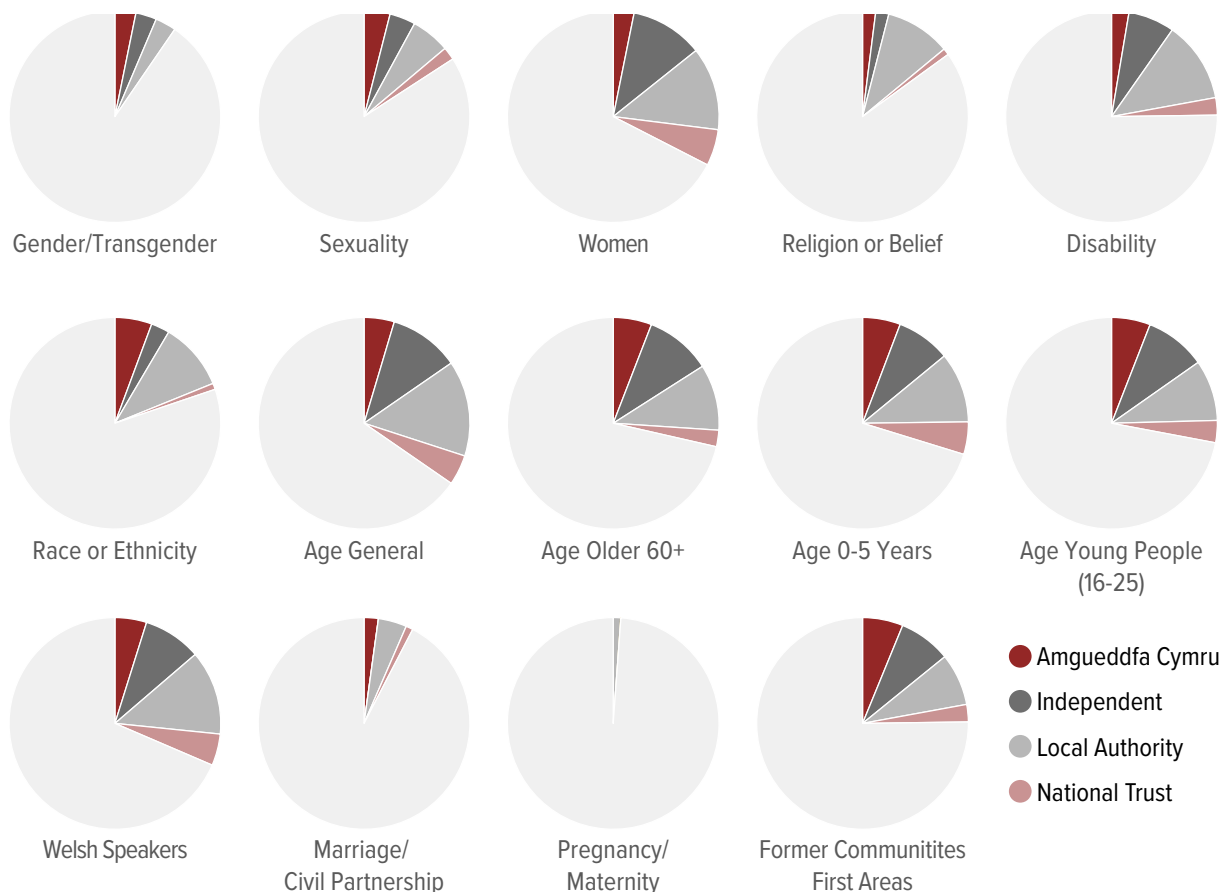
16. A collection for the nation

Levels of collection care and management have been monitored since 2011. Then, and in 2015, they remained at an average of 4.3. Unfortunately, the level, although still good has dropped to 4.10 in 2019.

Fig 16: Average overall service levels for museum users
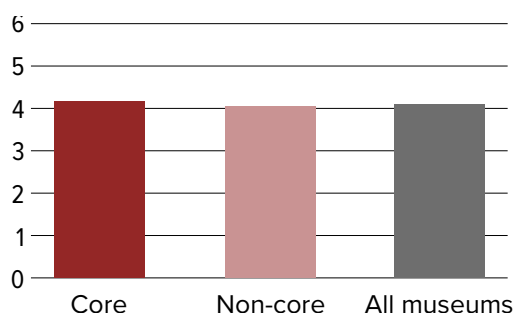
16.1 Recent acquisitions and disposals

In all 12,081 items were acquired by museums in Wales, which continues a downward trend from 2015, when it was 12,984. In 2011 the figure was 249,597, which with hindsight needs to be questioned.

- In 2019 museums in Wales cared for 6,275,185 objects

- Only 32% of museums reported a significant proportion of their collection was available online

16.2 Storage

- An increasing number of museums, 61%, reported that their stores are already overcrowded and a further 27% of museum have stores that will be full by 2026

Table 3

	Acquisitions		Disposals		
	Purchases	Gifts	Gifts	Sales	Destroyed
Amgueddfa Cymru	169	5,205	0	0	0
Non-national	228	6,479	3	0	76

17. Working Effectively

This section focusses on how museums are run, looking at workforce, policy and planning, buildings and finance.

17.1 Policy & Planning

Figures 3-6 in section 7 *Standards of Museum Practice* shows that service levels remain high, but they have fallen back since 2015.

Figure 17: Impact of policy and planning on other service levels

17.2 Workforce & Volunteers

Museums were asked to provide overall numbers of persons in their workforce, whether paid or voluntary and whether they were full time, part time or seasonal. Essentially the figures indicate that the increase in workforce in museums is due to the growth of the volunteer base. This is not only in terms of the number of people involved but also the hours they actually contributed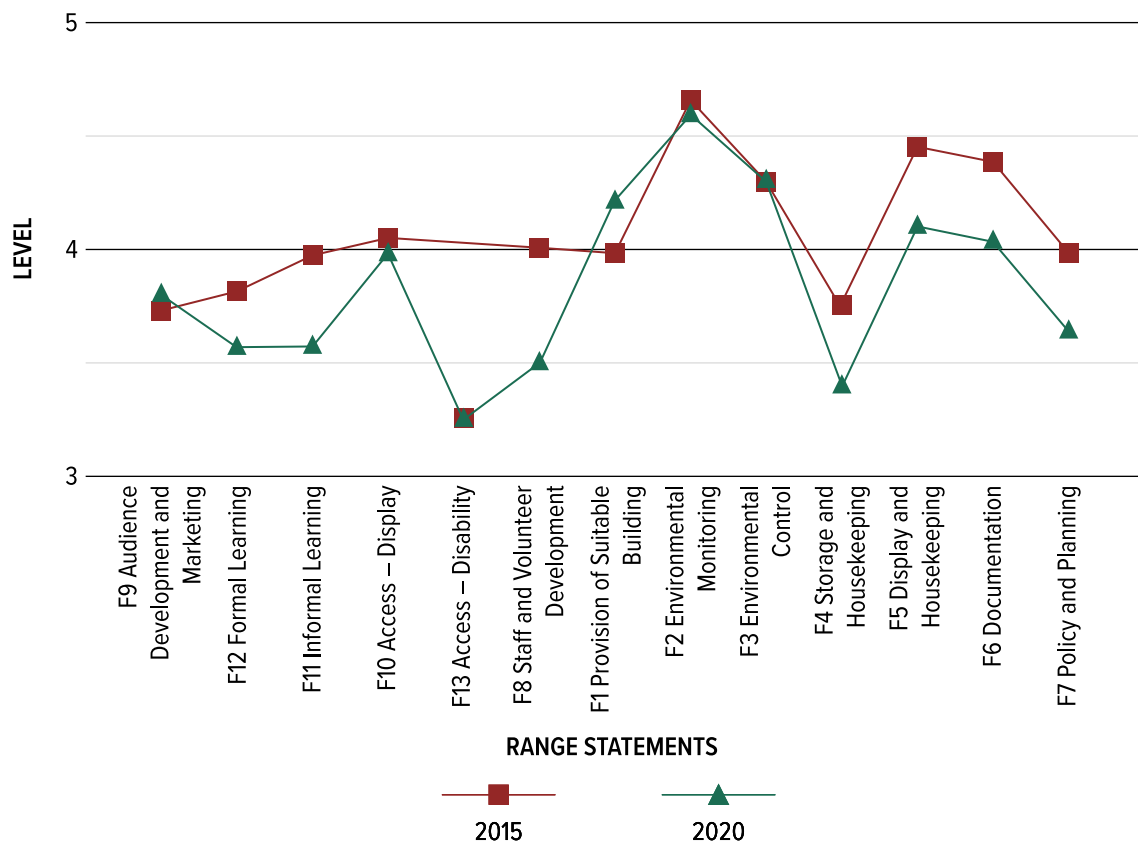. Although some museums have lost staff, some have increased staff so that on balance there has been very little change in FTE paid staff since 2015.

- 4,235 volunteers form 72% of the workforce, up from 66% in Spotlight 2015

- 404,676 hours were contributed by volunteers in 2020 a considerable increase from 177,815 hours in 2015

- 5,841 people work in museums in Wales, slightly less than in 2015

- There were 1,606 paid staff in museums with 991 being Full Time Equivalents

Table 4

	Volunteers	Volunteer hours	Employed	Employed FTE	Total Staff	%age Volunteer
Amgueddfa Cymru	1,134	29,507	838	543	1,972	57.5%
Independent	1,112	161,198	160	77.18	1,272	87.4%
Local Authority	434	34,649	263.5	140.38	697.5	62.2%
National Trust	1,555	179,322	345	231.12	1,900	81.8%
Grand Total	**4,235**	**404,676**	**1,606.5**	**991.68**	**5,841.5**	**72.5%**

Table 5

Core Group	Volunteers	Volunteer hours	Employed	Employed FTE	Total Staff	%age Volunteer
Amgueddfa Cymru	1,114	28,244	781	510	1,895	58.8%
Independent	631	107,371	85	41	716	88.1%
Local Authority	243	18,986	170.5	101.34	413.5	58.8%
National Trust	171	30,404	64	39.12	235	72.8%
Grand Total	**2,159**	**185,005**	**1100.5**	**691.46**	**3259.5**	**66.2%**

Table 6

FTE Breakdown by role	Front of House	Curatorial	Conservation	Access/ Education	Management/ Advice	Other
2018/19	514.69	139.26	112.89	114.78	139.99	346.9

Tables 7 & 8: Total workforce by employment type

All Museums	Volunteers	Employed staff
2010	2,118	1,317
2013/14	2,300	1,196
2018/19	4,235	1,606

Core Group	Volunteers	Employed staff
2010	792	962
2013/14	1,409	924
2018/19	2,159	1,100

The number shown here is the number of people employed rather than FTE.

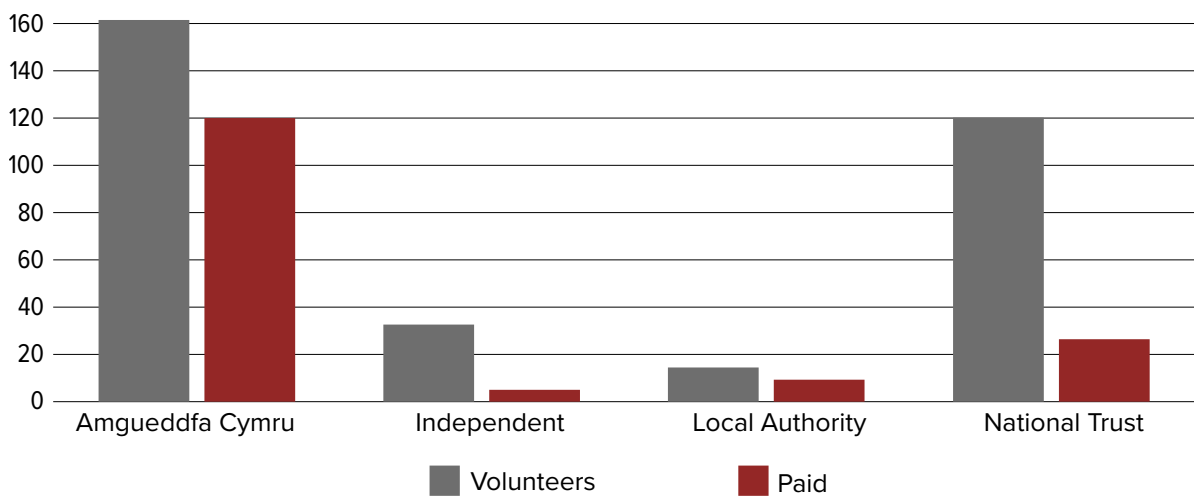*Figure 18: Average workforce levels by type of museum*

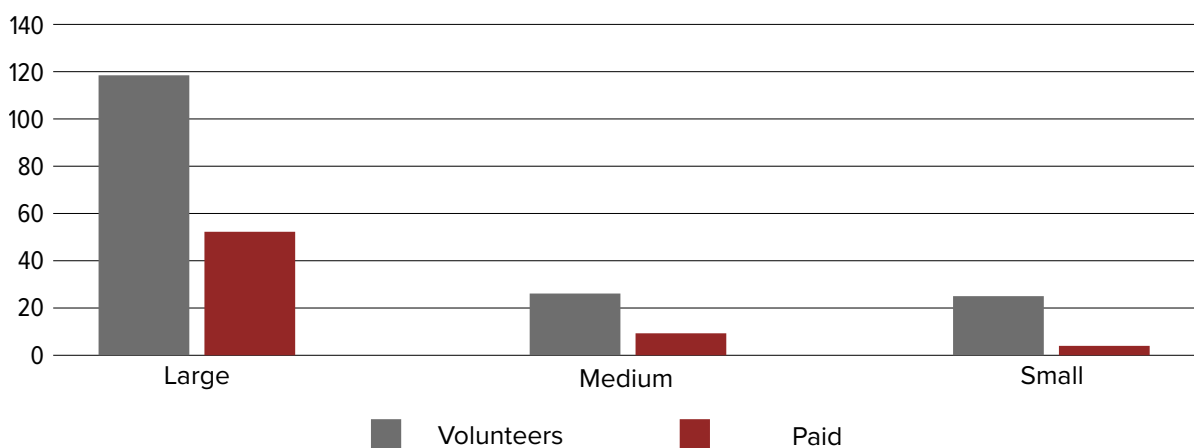*Figure 19: Average workforce levels by size of museum*

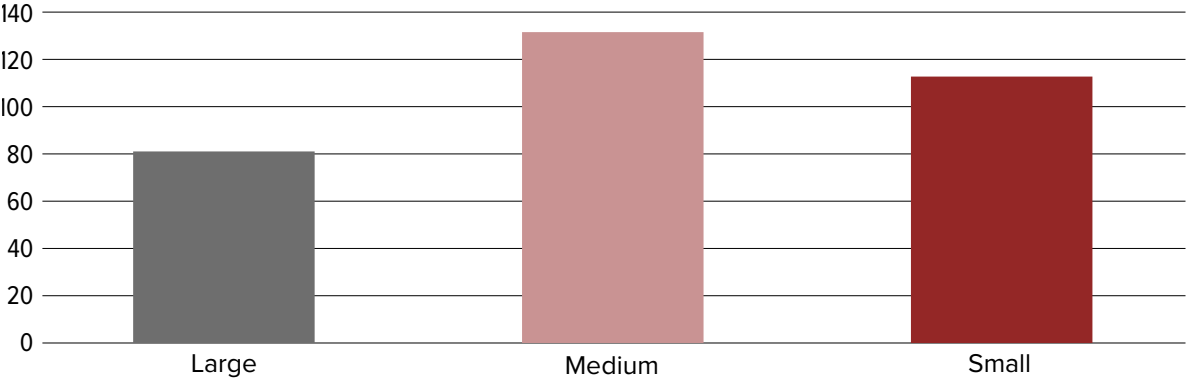*Figure 20: Average volunteer hours contributed per volunteer by size of museum*

Figure 21: Average volunteer hours contributed per volunteer by type of museum
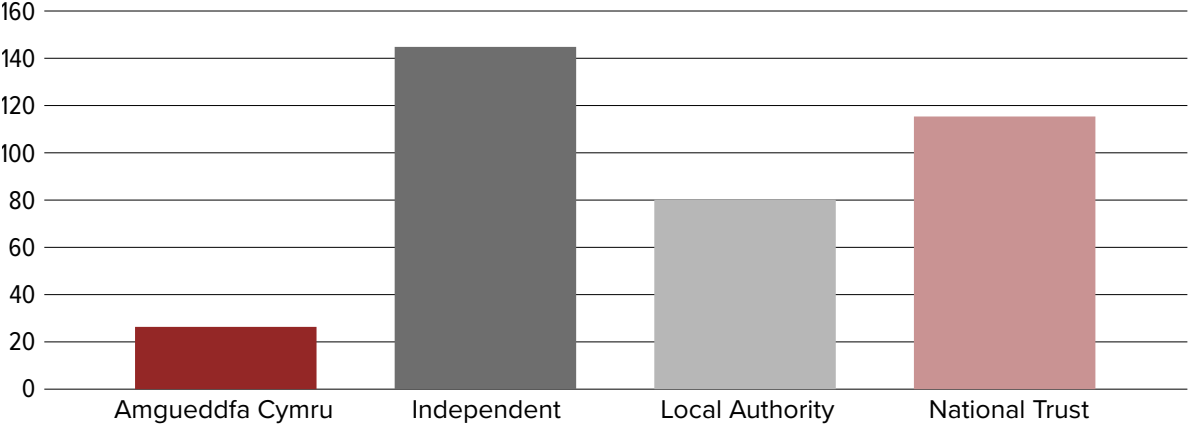
18. Finance

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

Table 9: Average budget by type of museum

	2014-15	2015-16	2016-17	2017-18	2018-19
Amgueddfa Cymru	£3,421,644	£3,383,501	£3,229,723	£3,281,866	£3,621,866
Independent	£134,650	£103,244	£108,310	£111,144	£110,679
Local Authority	£211,677	£198,160	£221,720	£216,503	£220,986
National Trust	£259,473	£276,867	£338,800	£364,565	£382,846

- Total budgets came to over £40 million a year

18.1 Income

In the current financial climate, museums are increasingly looking to income generation and diversification to support their operations. 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.

46 museums or 54% of respondents were free at point of entry.

Table 10

	Admission charged	Free	Sometimes / Seasonally
Amgueddfa Cymru	-	7	-
Independent	18	16	1
Local Authority	6	23	1
National Trust	13	-	-

Table 11: Earned income

	No additional charges	Temp / special exhibitions	Events	Formal education visits	Talks	Other
Amgueddfa Cymru	6	1	0	0	0	0
Independent	11	2	15	12	18	5
Local Authority	8	2	17	15	12	8
National Trust	3	0	10	3	2	0

Tables 12 & 13: Number of museums recording additional income

	Admissions income	Earned income	Donations income	Other contributed income
Amgueddfa Cymru				
Independent	18	27	29	18
Local Authority	9	21	18	6
National Trust	13	13	11	7

	Admissions income	Earned income	Donations income	Other contributed income
Amgueddfa Cymru				
Independent	£508,488	£713,513	£392,468	£42,914
Local Authority	£315,027	£387,180	£13,654	£40,606
National Trust	£751,538	£2,435,925	£68,812	£77,703

Since the 2015 survey, local authority support for independent museums has:

If the museum receives support, what form does this take?

Risen	12.9%
Fallen	29.4%
Stayed the same	21.2%
Not applicable (did not receive local authority support)	36.5%

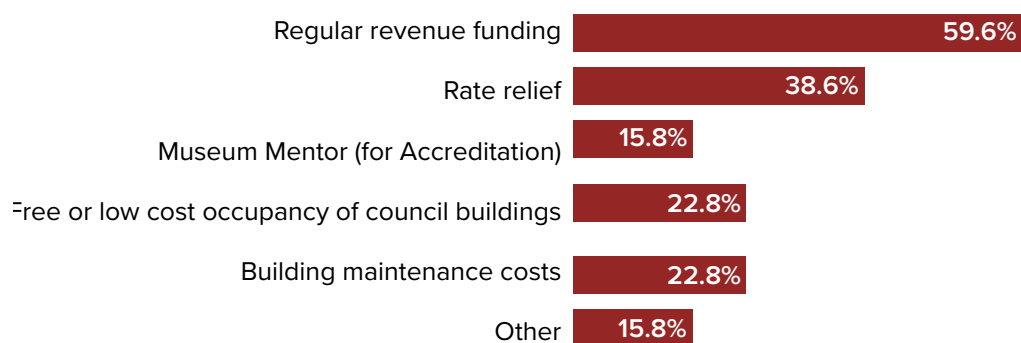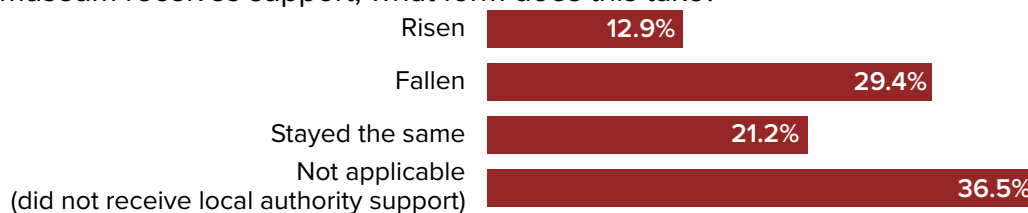|	
Regular revenue funding	59.6%
Rate relief	38.6%
Museum Mentor (for Accreditation)	15.8%
Free or low cost occupancy of council buildings	22.8%
Building maintenance costs	22.8%
Other	15.8%

Table 14: Sources of income all museums by type

	Admissions	Other earned	Public funding / grant	Donations	Other contributed	Revenue grant / project income	Capital grant / project income
Amgueddfa Cymru	£0	£0	£0	£0	£0	£0	£0
Independent	£670,650	£1,323,920	£637,815	£576,473	£121,772	£454,059	£1,977,823
Local Authority	£378,729	£978,642	£3,908,094	£46,171	£379,078	£697,226	£9,600
National Trust	£2,074,799	£5,511,657	£370,000	£212,650	£607,029	£54,000	£0
Grand Total	**£3,124,178**	**£7,814,219**	**£4,915,909**	**£835,294**	**£1,107,879**	**£1,205,285**	**£1,987,423**

St Fagans – Art Fund Museum of the Year

In 2019 St Fagans completed a major £30 million project transforming the visitor experience with new galleries and a centre for learning in the main building, and a re-created medieval court, Llys Llywelyn, and Gweithdy (Welsh for 'workshop'), a centre for creativity, on the site.

The aim was to create history 'with' people rather than 'for' people. The Museum remained open throughout the development, welcoming 3 million visitors to explore the changes as they happened. An imaginative public programme engaged 720,0000 people in shaping the transformation. For this innovative approach St Fagans won Art Fund Museum of the Year in 2019.

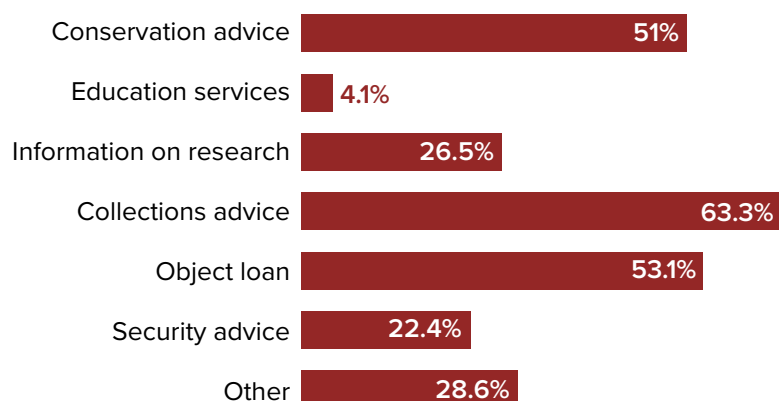*Image courtesy of Amgueddfa Cymru - National Museum Wales ©*

19. Local Museums and Amgueddfa Cymru – National Museum Wales

Tables 15 & 16: Services provided by Amgueddfa Cymru

	Conservation advice	Education services	Information on research	Collections advice	Object loan	Security advice	Other
Amgueddfa Cymru	0	0	0	0	0	0	6
Independent	9	1	4	10	8	4	3
Local Authority	18	1	9	17	19	7	5
National Trust	2	0	0	4	3	0	0
Grand Total	**29**	**2**	**13**	**31**	**30**	**11**	**14**

	Conservation advice	Education services	Information on research	Collections advice	Object loan	Security advice	Other
Large	4	1	3	6	7	2	6
Medium	10	1	7	13	12	5	5
Small	15	0	3	12	11	4	3
Grand Total	**29**	**2**	**13**	**31**	**30**	**11**	**14**

The most common support accessed by local museums were collections advice, conservation advice and object loans.

Service	Percentage
Conservation advice	51%
Education services	4.1%
Information on research	26.5%
Collections advice	63.3%
Object loan	53.1%
Security advice	22.4%
Other	28.6%

Appendix A. List of museums responding

Aberconwy House	*Core*	CC4 Museum of Welsh Cricket	
Abergavenny Museum	*Core*	Chepstow Museum	*Core*
Aberystwyth University School of Art Museum and Gallery	*Core*	Chirk Castle & Gardens	
		Conwy Toll Bridge	*Core*
Amgueddfa Ceredigion Museum	*Core*	Cyfarthfa Castle Museum & Art Gallery	*Core*
Amgueddfa Forwrol Llyn			
Amgueddfa Lloyd George	*Core*	Cynon Valley Museum	
Andrew Logan Museum of Sculpture		Dinefwr	
		Erddig	
Barmouth Sailors' Institute	*Core*	Firing Line Museum of The Queen's Dragoon Guards and The Royal Welsh	
Big Pit National Coal Museum	*Core*		
Caldicot Castle Museum Store & Collection		Glynn Vivian Art Gallery	*Core*
Carmarthenshire Museum	*Core*	Greenfield Valley	*Core*

Sandford Award Winning Educational Tour at Rhondda Heritage Park

"The learning team provides an outstanding learning experience that delivers both an in depth understanding of the science and history of the coal industry of the Rhondda Valley and a deeply moving insight into life underground and the wider social and political issues that affected the community.

The learning programme also has the capacity to reinforce local children's sense of their roles as global citizens and their community's important contribution to the world." *Christine Chadwick Heritage Consultant & Sandford Award Judge.*

Image courtesy of Rhondda Heritage Park / RCT CBC Heritage Service ©

Gwefr heb Wifrau / Wireless in Wales		Plas yn Rhiw	*Core*
		Pontypridd Museum	*Core*
Holyhead Maritime Museum	*Core*	Porthcawl Museum	*Core*
Internal Fire Museum of Power		Powis Castle and Garden	
Joseph Parry's Ironworkers Cottage	*Core*	Radnorshire Museum	*Core*
Kidwelly Industrial Museum	*Core*	Rhayader Museum and Gallery	
Llandudno Museum	*Core*	Rhondda Heritage Park	
Llanerchaeron		Rhyl Miniature Railway	
Llanidloes Museum and Library	*Core*	Rhyl Museum	
Milford Haven Heritage and Maritime Museum		Robert Owen Museum	*Core*
		Royal Mint Museum	
Monmouth Museum	*Core*	Royal Welch Fusiliers Museum	*Core*
Museum of Cardiff		Ruthin Gaol	
Museum of Modern Art (MOMA), Machynlleth		Scolton Manor	*Core*
Museum of Speed, Pendine	*Core*	South Wales Police Heritage Centre	
Nantclwyd Y Dre House and Gardens		St Fagans National Museum of History	*Core*
Nantgarw China Works & Museum		Storiel	
Narberth Museum	*Core*	Swansea Museum	*Core*
Narrow Gauge Railway Museum	*Core*	Tenby Museum and Art Gallery	*Core*
National Museum of Wales Cardiff	*Core*	The Egypt Centre	*Core*
National Roman Legion Museum	*Core*	The Judge's Lodging	*Core*
National Slate Museum	*Core*	The Regimental Museum of The Royal Welsh	*Core*
National Trust - Penrhyn Castle	*Core*	Torfaen Museum Trust	*Core*
National Trust Plas Newydd		Tredegar House	
National Waterfront Museum		Tudor Merchant's House	
National Wool Museum	*Core*	Ty Mawr Wybrnant	*Core*
Newport Museum and Art Gallery	*Core*	Winding House	
Newtown Textile Museum		Wrexham County Borough Museum and Archives	*Core*
Old Bell Museum	*Core*	y Gaer (Brecknock)	*Core*
Oriel Mon	*Core*	Y Lanfa / The Wharf: Powysland Museum and	
Parc Howard Museum	*Core*		
Penmaenmawr Museum		Welshpool Library	*Core*
Penrhos Cottage	*Core*		
Plas Glyn y Weddw			
Plas Newydd			