MUSEUMS AOTEAROA
2012 SECTOR SURVEY REPORT

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March 2013

EXECUTIVE SUMMARY

This report presents the findings from the 2012 museum sector survey commissioned by Museums Aotearoa. The purpose of the sector survey is to build a profile of museums and galleries in New Zealand to inform decision-making and planning and support advocacy for the sector. This survey builds on earlier work undertaken by Museums Aotearoa and others, and its content and format is partly determined by the desire to align with previous surveys. It is anticipated that the sector survey will be conducted on a regular basis so that trends and changes in the sector can be observed, monitored and addressed as required.

Consistent with earlier sector surveys, the definition of 'museum' is broad and includes traditional museums, art galleries, historic houses, open-air museums, science centres, cultural centres and marae-based whare taonga. We have segmented the sector by museum 'size' according to the number of paid full-time (PFT) employees (ie 30 hours or more per week):

- 0 PFT micro museum
- 1 – 5 PFT small museum
- 6 – 20 PFT medium museum
- 20+ PFT large museum

The response rate gives a good representation of New Zealand's museum and gallery sector. It should be noted that the participation of large museums was constrained by 3 being without directors and another 2 having new directors and undergoing major restructuring at the time of the survey.

Characteristics of participating museums

- All museums (n=471) in New Zealand were invited to participate in the 2012 sector survey. A total of 117 museums responded i.e. a response rate of 25 per cent.
- Small and micro museums, which make up the majority (90 per cent) of the museum sector, submitted the majority (75 per cent) of survey responses. However, while small and micro museums comprised the majority of responses they were not well-represented proportionally, with only 37 per cent of small museums and 14 per cent of micro museums participating in the survey.
- In contrast large and medium museums were reasonably well-represented in the survey, with half of large museums and two-thirds of medium museums providing responses.
- The survey had reasonably good geographic spread, with 57 per cent of museums located in the North Island and 42 per cent in the South Island. Just under half of the survey responses were submitted by the main regions: Canterbury (14 per cent); Wellington and Wairarapa (13 per cent); Auckland (11 per cent); and Otago (9 per cent).
- Museums reported that they have a total of 522 buildings; 239 separate on-site buildings; 238 exhibiting sites; and 45 separate off-site buildings. A small number (n=4) of museums stated they do not have exhibiting sites; 2 of which were virtual museums, and one that was closed due to the 2011 earthquake.
- The majority (65 per cent) of museums were established or commenced operating between 1971 and 2008. The single biggest period of growth was between 1971 and 1990 when a third of museums were established.
- Museums most commonly described their legal status as 'incorporated societies' or 'charitable trusts' (38 per cent each).
- Museums offered a mix of admission charging regimes. Over a quarter (29 per cent) of museums offered free admission to all visitors; over a third (37 per cent) invited voluntary donations/koha; and over a quarter (28 per cent) charged admission fees for all visitors, with a tiered pricing structure (e.g. adult, children, and student prices).
- When analysed by museum size, it appears that large and medium museums were more likely to have free admission than small and micro museums.

Care and management of collections

- The primary function of museums was most likely to be 'history/social history/community museum' (43 per cent), with a further 10 per cent of museums identifying this as their secondary function. The most commonly identified secondary functions were 'historic site/building' and 'archive' (15 per cent each).
- The most commonly identified categories represented in museums' collections were photographs (82 per cent); books and printed material (74 per cent); social history (68 per cent); and archives and manuscripts (64 per cent).
- The majority (78 per cent) of museums have collections of 50,000 objects or less. Large museums tended to have larger collections than other museums, with 43 per cent having collections of over 1.01 million items, compared with the majority of micro museums having collections of 50,000 items or less.
- The majority (78 per cent) of museums acquired new collection items in the past financial year (via gifting/donations, purchases, field work or 'other'). The total number of acquisitions was 99,852, of which the majority (96 per cent) were gifted or donated.
- The total value of acquisitions was reported to be $24,867,926; however this figure is somewhat skewed by a one-off acquisition valued at approximately $10 million.
- Museums were more likely to have their collections manually documented than electronically documented. Just under half (43 per cent) of museums had their entire collections manually documented and a further 29 per cent had between 51 – 99 per cent of their collections manually documented. Whereas only 23 per cent had their entire collections electronically documented, and a third had between 51 – 99 per cent of their collections electronically documented. Large museums were more likely than other museums to have their collections electronically documented.
- Museums were more likely to have their collections documented to a basic inventory level than full catalogue level, or full catalogue level including digitised images. Almost third of museums had their entire collections documented to a basic inventory level, compared with 13 per cent catalogued to the full catalogue level and 3 per cent to the full catalogue level including digitised images.
- The majority of museums reported they had an acquisitions policy, a collection management policy and a deaccession policy; however the majority (74 per cent) did not have a digitisation policy. A minority (17 per cent) of museums did not have any of these policies, including 2 with no permanent collections. Large and medium museums were more likely than small and micro museums to have policies in place.
- The majority (62 per cent) of museums had not had any collection items treated by conservators in the past financial year. Of those that did, a total of 4,567 items were treated. Note this number is somewhat skewed by one museum that reported it had 3,000 items treated by conservators.
- Almost a third (32 per cent) of museums stated that between 81 – 100 per cent of their collections were appropriately stored. Of concern is the third (33 per cent) of museums that reported they had less than 20 per cent of their collections appropriately stored; 9 per cent of which stated that none of their collections were appropriately stored.
- The majority (61 per cent) of museums had not had their collections valued as heritage assets within the past five years. Of those that had their collections valued, 10 per cent had their entire collections valued while in contrast 10 per cent had only 1- 10 per cent of their collections valued.
- Of the museums that had their collections valued, over a third (39 per cent) had a declared asset value of $5.01 million or more; 30 per cent had declared asset values of $400,000 - $2 million; and 30 per cent had declared asset value of $300,000 or less. Large and medium museums had greater declared asset values. The majority of large museums had assets valued at $20 million or more; in contrast micro museums had assets of $1 million or less.
- Concerns that museums expressed about their collections included: lack of funding and resourcing to undertake the appropriate care and management of collections; lack of skilled and experienced staff to care for collections; workload pressures and competing priorities that hinder the care, maintenance and management of collections; and lack of access to collections due to the 2011 Christchurch earthquake, or moving to new premises.

Access, visitation and engagement

- The proportion of collections on display was low, with approximately half (47 per cent) of museums displaying 20 per cent or less of their collections. When analysed by museum size it is apparent that large museums tended to have less of their collections on display.
- The most common (44 per cent) way in which museums monitored visitation was via a manual door count. When analysed by museum size it is clear that large museums were more likely to use electronic counting systems, whereas small and micro museums used less reliable forms of counting visits, such as manual door counts and estimates. A small number of small and micro museums did not monitor visitation at all.
- The majority (65 per cent) of museums achieved 20,000 visits or less in the past financial year. Large museums were likely to have higher visitation, with 43 per cent achieving visitation of 100,001 – 200,000 and a further 29 per cent achieving more than 500,000 visits. In contrast, small and micro museums had 50,000 visits or less.
- Local visitors i.e. from the region in which the museum was located made up 47 per cent of overall visitation; visitors from elsewhere in New Zealand made up 30 per cent; and international visitors made up 23 per cent.
- The majority (81 per cent) of museums have a website. Almost all (95 per cent) have visiting information available on their website; and the majority (74 per cent) have information about current exhibitions, public programmes and events.
- The proportion of collections accessible online was low (and lower than the proportion on public display). A third (34 per cent) of museums did not have any of their collections accessible online, and a further 48 per cent only had between 1 – 10 per cent of their collections accessible online.
- Of the museums that have a website, 64 per cent were able to provide visitation data. Over a third (39 per cent) had online visitation of 10,001 – 50,000. As with in-person visitation, large museums achieved higher levels of online visitation than other museums, achieving 50,001 – 2 million visits in the past financial year.
- The main concerns that museums expressed about access and engagement included: decreasing and/or static visitation; the need to develop their websites in order to heighten visibility and improve access to collections; inadequate numbers of staff and volunteers; the need to encourage local support and a sense of ownership of the museum in order to increase visitation; and high costs of marketing and/or insufficient funds to undertake marketing.

Financial information

- Museums reported operating expenditure that ranged from less than $1,000 to in excess of $20 million in the past financial year.
- All large museums and the majority of medium museums had operating expenditure in excess of $2 million in the past financial year. In contrast the majority (94 per cent) of small museums had operating expenditure of $50,001 - $1 million; and the majority (84 per cent) of micro museums had operating expenditure of $50,000 or less.
- Large museums had average operating expenditure of $16,141,166; medium museums had average operating expenditure of $1,220,673; small museums had average operating expenditure of $248,677; and micro museums had average operating expenditure of $24,915.
- The largest proportion of operating expenditure was spent on staff costs (45 per cent), followed by depreciation (19 per cent).
- A quarter of museums reported they did not have capital expenditure in the past financial year. Of the museums that did, the amounts ranged from $1.00 - $5 million. Over a third (39 per cent) spent between $1.00 and $30,000.
- The majority of capital expenditure was spent by large museums, which reported an average of $1,588,177 capital expenditure. Medium museums reported an average of $331,743; small museums reported an average of $92,198; and micro museums reported an average of $14,384 capital expenditure.
- The main areas of capital expenditure were 'capital works – buildings' (30 per cent); 'exhibition renewal/maintenance' (25 per cent); and 'other plant and equipment' (23 per cent).
- Museums reported a total of $135,328,565 revenue. The largest source of revenue was from local government (44 per cent), followed by central government (27 per cent). Museums raised approximately 20 per cent of their revenue via commercial activities, membership programmes, sponsorship, donations and admission charges.
- Of the total $135,328,565 reported revenue, the majority (79 per cent) was received by large museums.
- The main concerns that museums expressed about finances included: increased operating costs; reduced funding options; limited funding available for capital projects; and reliance on grants to undertake capital works, and their limited availability.

Staffing and volunteers

- A total of 1,625 people were employed by museums in the past financial year, over half (57 per cent) of whom were paid full time staff. Large museums employed the majority (64 per cent) of all full time, part time and casual staff.
- Museums reported that casual staff worked a total of 164,697 hours, ranging from a minimum of 15 hours in one museum to a maximum of 90,943 hours in another museum. On average casual staff worked 433 hours.
- Staff turnover in museums was low in the past financial year. Over half (n=48, 55 per cent) of museums had no staff turnover in the past financial year; and a third (n=29, 33 per cent) had between 1 – 20 per cent turnover.
- Museums were supported by a total of 1,946 volunteers in the past financial year. Volunteers worked a total of 185,712 hours, ranging from 1 volunteer in one museum to 240 volunteers in another museum. Museums used an average of 25.6 volunteers.
- Museums reported that volunteers worked a total of 185,712.5 hours, a third (34 per cent) of which was worked in small museums and a further third (32 per cent) in micro museums. Total volunteer hours ranged from a minimum of 20 hours in one museum to a maximum of 36,400 hours in another museum. Overall, volunteers worked an average of 95.4 hours
- Over half (56 per cent) of museums did not receive additional free support services from other organisations. Of those that did receive support services, they received support in the areas of IT (21 per cent), financial management (18 per cent), human resources and communications/marketing (16 per cent each).
- The main concerns about staffing that museums expressed included: not having enough staff; mot having enough volunteers; remuneration concerns; and finding funding in order to employ paid staff; staff retention.

Most pressing concerns for upcoming year

- Two-thirds (62 per cent) of museums identified concerns for the upcoming year.
- The most commonly identified (n=53) concerns were funding and income-related such as: fundraising challenges; limited availability of grants; increased operating costs; the impacts of changes imposed by local and central government; and the costs of building new facilities.
- Museums also expressed concerns about collection care and management (n=18), such as: management and documentation of collections; conservation; digitisation; and ensuring that policies and strategies are up to date.
- Building-related concerns (n=17) were also mentioned, for example: earthquake strengthening; improving display and exhibition spaces; and ensuring adequate and appropriate storage.
- Visitation and engagement concerns (n=16) were identified, for example: how to increase visibility and awareness via marketing and social media; increasing engagement and ensuring that audience expectations are met; and increasing visitation.
- Staff-related concerns (n=14) were also identified, particularly the challenges in recruiting volunteers and the challenges of finding appropriately skilled and experienced staff.

Conclusion

Museums Aotearoa acknowledges the work and support of Lisa McCauley, staff at the Ministry for Culture and Heritage, members of the sector reference group and Museums Aotearoa Board who have put many hours into developing and processing this survey. We particularly thank all the staff and volunteers at all the museums who gathered their information to contribute to the survey. We appreciate your feedback and look forward to continuing to improve the survey, the process, and the analysis and presentation of information.

This report represents comprehensive analysis of the data collected in October 2012, and some comparison with previous survey data. It is our intention to use this as the basis for further synthetic analysis, extrapolation and interpretation. We invite readers to make as much use of the reported data as possible, and to continue to provide feedback as we continue to gather, interpret and publish vital information about our museums and galleries.

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