

# Appendix F: Art Museums and Collections Study

PREPARED BY CAROL BROWN AND ASSOCIATES

## TABLE OF CONTENTS

<b>KEY FINDINGS</b> .....	<b>4</b>
<i>Funding</i> .....	4
<i>Acquisitions</i> .....	4
<i>Collections and Physical Infrastructure</i> .....	4
<i>Exhibitions</i> .....	4
<i>Audience Development</i> .....	4
<i>Outreach</i> .....	4
<b>1. INSTITUTIONAL FRAMEWORK</b> .....	<b>6</b>
1.1 PUBLIC AND PRIVATE MUSEUMS AND COLLECTIONS .....	6
1.2 MANAGEMENT STRUCTURES .....	7
1.3 THE DEMOGRAPHICS OF GOVERNING BOARDS .....	8
1.3.1 <i>The Demographics of governing Boards (Charts)</i> .....	9
<b>2. STAFFING</b> .....	<b>11</b>
2.1 STAFFING NUMBERS .....	11
2.2 STAFFING DEMOGRAPHICS .....	12
2.2.1 <i>Senior Management</i> .....	12
2.2.2 <i>Middle Management</i> .....	13
2.2.3 <i>Specialist Technical</i> .....	14
2.2.4 <i>Ancillary and Support</i> .....	15
2.3 STAFF BENEFITS AND TRAINING .....	16
2.4 VOLUNTEER SUPPORT.....	16
3. FINANCES .....	17
3.1 INCOME .....	17
3.2 SUPPLEMENTARY INCOME (DONATIONS) .....	19
3.3 EXPENDITURE.....	20
3.4 REPLACEMENT VALUE OF ALL ASSETS.....	22
<b>4. COLLECTIONS MANAGEMENT</b> .....	<b>23</b>
4.1 SIZE OF COLLECTION.....	23
4.2 VALUE OF COLLECTION .....	23
4.3 COLLECTIONS MANAGEMENT .....	24
<b>5. ACQUISITIONS</b> .....	<b>26</b>
5.1 ACQUISITIONS BUDGETS .....	26
5.2 RECENT ACQUISITIONS .....	27
5.3 ACQUISITIONS POLICIES .....	27
<b>6. EXHIBITION PROGRAMMING</b> .....	<b>29</b>
6.1 EXHIBITION SPACE .....	29
6.2 EXHIBITIONS FROM THE PERMANENT COLLECTION.....	29

6.3 TEMPORARY EXHIBITIONS .....	30
6.4 INTERNALLY-CURATED EXHIBITIONS .....	32
<b>7. AUDIENCES.....</b>	<b>34</b>
7.1 AUDIENCE SIZE.....	34
7.2 AUDIENCE ATTENDANCE PATTERNS .....	34
7.3 AUDIENCE DEMOGRAPHICS .....	34
7.4 VISITORS' FEES.....	35
7.5 PUBLICITY.....	35
<b>8. STRATEGIC CHALLENGES.....</b>	<b>36</b>
8.1 FUNDING SOURCES AND FUTURE EXPENDITURE .....	37
8.2 SKILLS GAPS.....	39
8.3 PHYSICAL CONDITIONS .....	39
8.4 AUDIENCES.....	39
<b>RECOMMENDATIONS.....</b>	<b>41</b>
1. <i>Funding</i> .....	41
2. <i>Acquisitions</i> .....	41
3. <i>Collections and Physical Infrastructure</i> .....	41
4. <i>Exhibitions</i> .....	41
5. <i>Audience Development and Outreach</i> .....	42
6. <i>Management Demographics</i> .....	42
7. <i>General</i> .....	42

## Key Findings

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### Funding

The museums sector – including both public and private institutions – perceives its future in corporate and self-generated funding rather than in government and public-sector funding.

### Acquisitions

It is clear that public museums are not able to acquire new artworks at anything near the rate or volume at which corporate collection and private institutions are currently doing. Corporate collections are therefore responsible for the majority of new acquisitions of artwork in the country. Nonetheless, it is important to note that – despite this differential – public museums have continued to acquire new works for their collections, in large part due to both financial support and direct donations of artworks from private individuals.

### Collections and Physical Infrastructure

Both public and private institutions have been able to maintain the physical integrity both of their permanent collections and – to a marginally lesser extent – of their physical premises. This contrasts strongly with tendencies in neighbouring countries, and can be counted as a significant signifier of these institutions' continuing viability.

### Exhibitions

Public museums organise and display significantly more temporary exhibitions than private collections; most of these museums also report producing exhibitions that travel between institutions. This strongly suggests that the sharing of resources between museums has played a significant role in allowing them to continue to show a wide range of exhibitions.

### Audience Development

Public museums have been notably successful at attracting large – and reportedly diverse – audiences through public events, school tours, and education and outreach programmes. Most respondents report that this success is ongoing – as visitors numbers continue to increase; most, however, also believe that their audiences can still be further developed.

### Outreach

Education and community outreach programmes are currently under-resourced in both public and private institutions; a large number of surveyed institutions also emphasise the necessity of redressing this under-resourcing to enable continuing audience development.

## Overview of Methodology

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### **Initial Phase:**

The initial phase of the project involved updating and supplementing the existing database of public and private museums and collections in South Africa. This revised database then provided the basis on which institutions were invited to participate in the broader survey.

### **The Survey:**

A lengthy survey was prepared, consisting of 84 questions organised into seven sections. These covered institutional arrangements, audiences, exhibition practices, collections management, staffing issues, financial arrangements, and strategic challenges faced.

A wide range of possible response-types were included in the final survey, including yes/no questions, the choice of percentage-ranges, numerical responses, and textual responses.

The survey could be completed in several ways. First, respondents could enter a website address and complete the survey electronically. Second, a pdf version of the survey was sent to all participants, with the intention that it could be printed and manually completed before being returned by fax. Finally, participants were either telephoned or – when possible – visited, and the survey discussed and completed in collaboration with an interviewer.

### **The Interviews:**

A number of supplementary interviews were conducted telephonically, in person, and over email correspondence. These were in part used to elicit informal responses from reluctant participants. More commonly, however, these interviews were used to elicit informal commentary and discussion which – while impossible to quantify – were then used to aid in the interpretation of the more formal responses garnered from the completed survey forms.

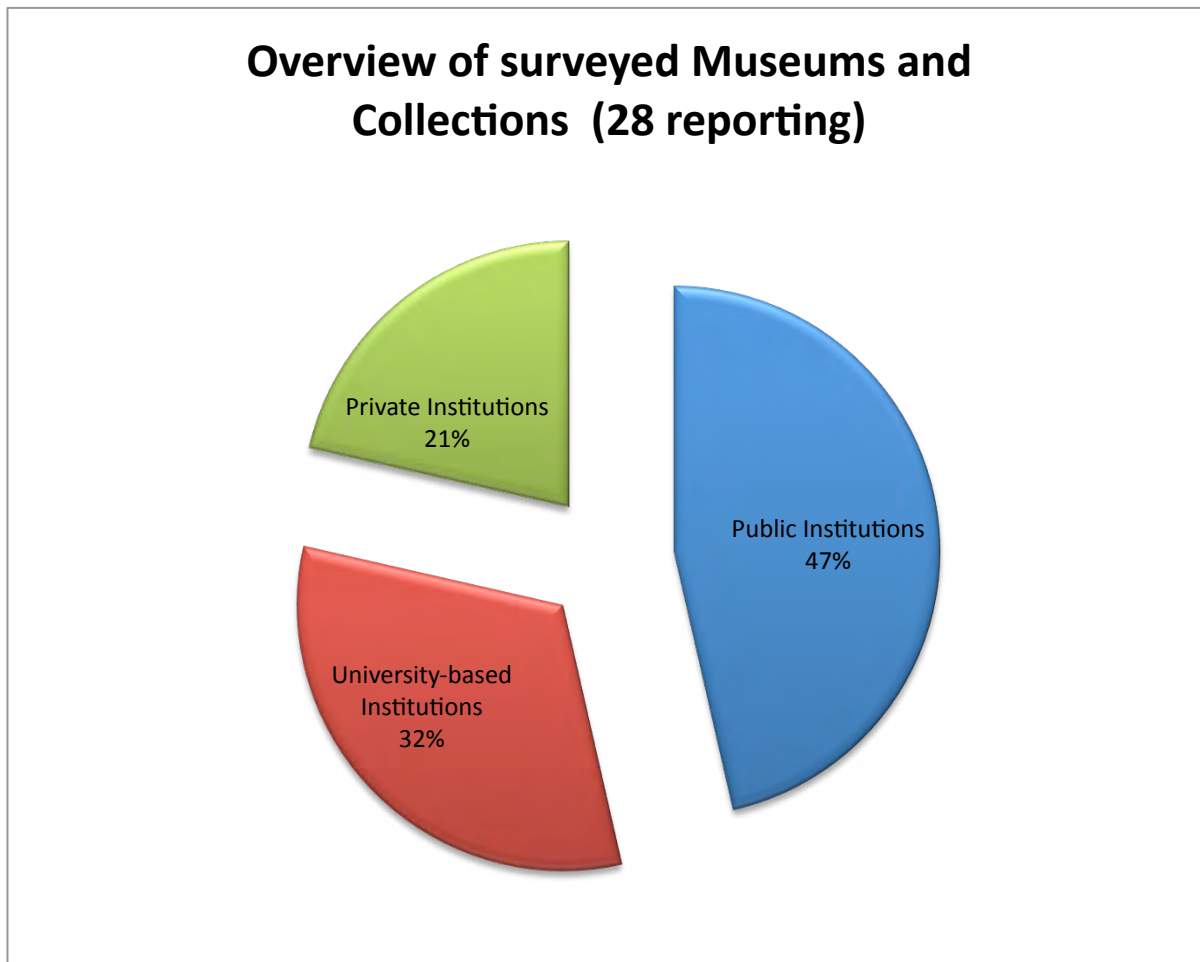
### **The Participants:**

Approximately 40 institutions were invited to participate in the survey. Of these, a total of 21 institutions fully or partially completed the survey. This resulted in over 50% of the solicited participants responding and completing the survey.

The responding institutions included nine municipal or national government institutions, six university-based institutions, four corporate collections, and two independent collections. Of these, eleven institutions self-identified as public and ten as private.

# 1. Institutional Framework

## 1.1 Public and private museums and collections



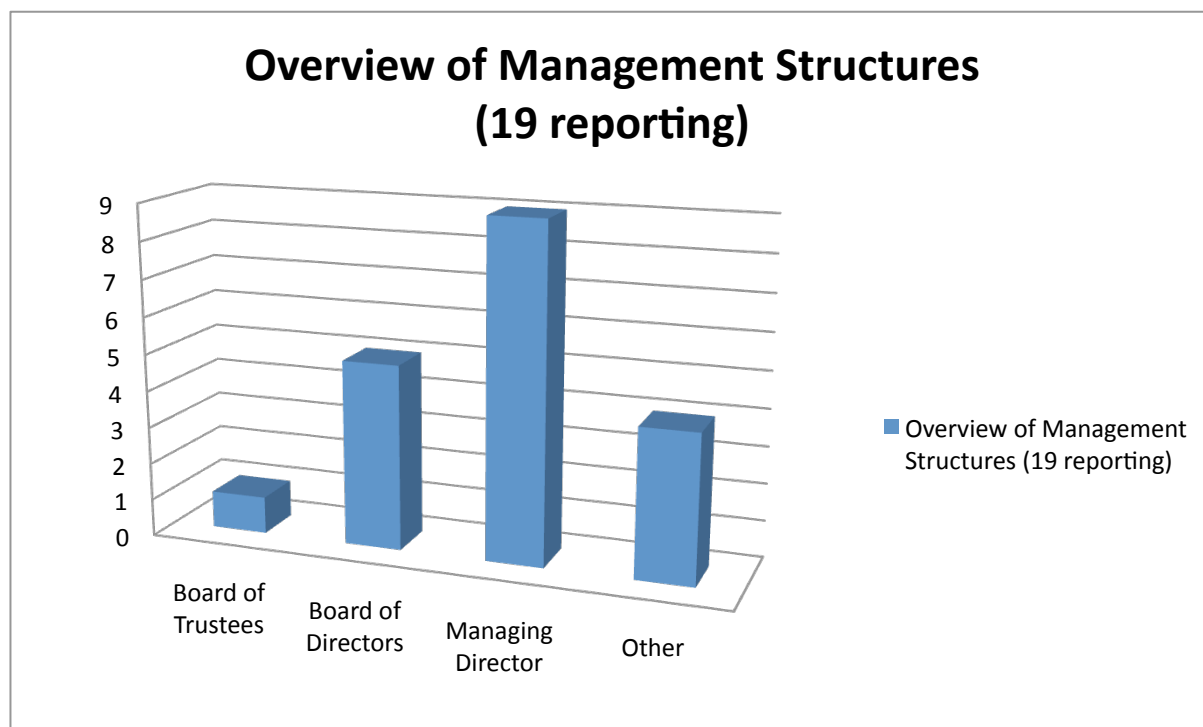
Of the 28 respondents, approximately 47% (13 institutions) identified themselves as ‘public’ organisations. A further 32% (8 institutions) identified themselves as being based in a university, while the remaining 21% (6 institutions) could be identified as ‘private.’

Of the public museums, 8 (61%) were identified as being run as Local Government or Municipal institutions. The remaining 5 (39%) were identified as being run by the National Government. No respondents identified themselves as run by Provincial Government.

Of the private museums and collections, 4 (66%) described themselves as being administered as ‘corporate sub-divisions.’ Only 1 described itself as a charitable trust, while the remaining respondent described itself as a Section 21 type non-profit organisation.

The remaining respondents indicated that they were run as university departments.

## 1.2 Management Structures

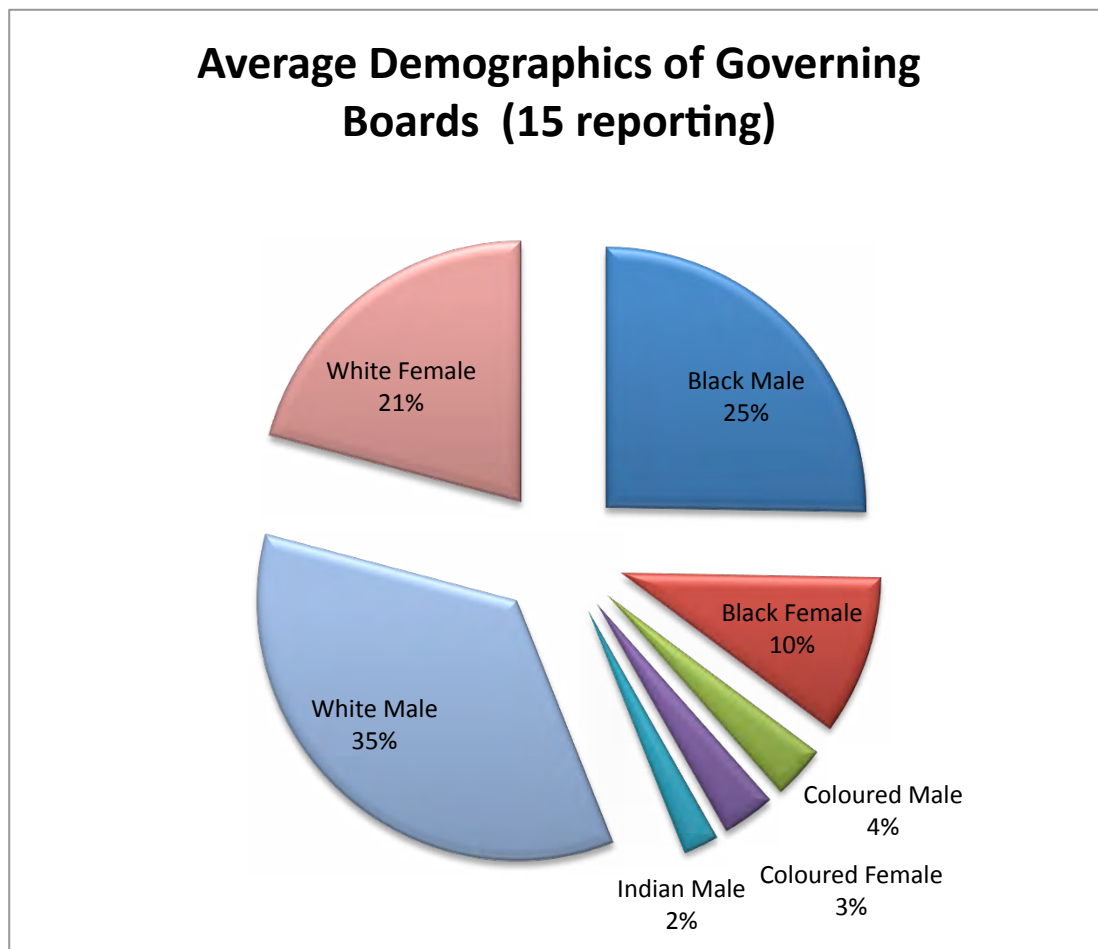


The most common form of management structure amongst all surveyed institutions was a single Managing Director/Curator. Approximately 47% of all respondents reported being administered by such a Director. The second most common management structure was a Board of Directors, possessed by 26% of the respondents. (Only one of the respondents reported having both a Managing Director and a governing Board of Directors.)

The presence of a Board of Directors was notably more common amongst public museums and collections than amongst private ones, with approximately a third of these respondents reporting such a structure. Only one private institution reported the presence of a Board of Directors, while a second such institution reported being governed by a Board of Trustees rather than of Directors. (This same institution is run as a Section 21 company, which may explain this discrepancy.)

**NOTE:** Several corporate collections chose either not to answer this question, or to indicate that – despite the option of identifying a ‘corporate divisional head’ – they could not describe their particular management structure. This may also explain the large number of responses indicating that an ‘Other’ alternative was needed; in telephone interviews it became clear that this was often a response to the particularities of bureaucratic structures within institutions and that a senior Curator was often not identified as Managing Director.

### 1.3 The Demographics of governing Boards



Of those respondents reporting the presence of a Board of Directors or Trustees, 75% indicated that this Board met quarterly. Just under 19% indicated that their Board met monthly; while the remaining 6% indicated that their Board met every two months.

The largest such Board consisted on 17 members, and the smallest of 3 members. The vast majority of the respondents – 90% – indicated that their Boards included one or more Black males; fifty percent of the respondents also included one or more Black females on their Board. In minor contrast, 90% of the respondents indicated that their Boards included White females while only 70% included one or more White males as members of these boards.

By contrast, only 20% of the respondents had either Coloured males or females represented on their Boards and only 10% of the respondents had Indian or Asian Board members.

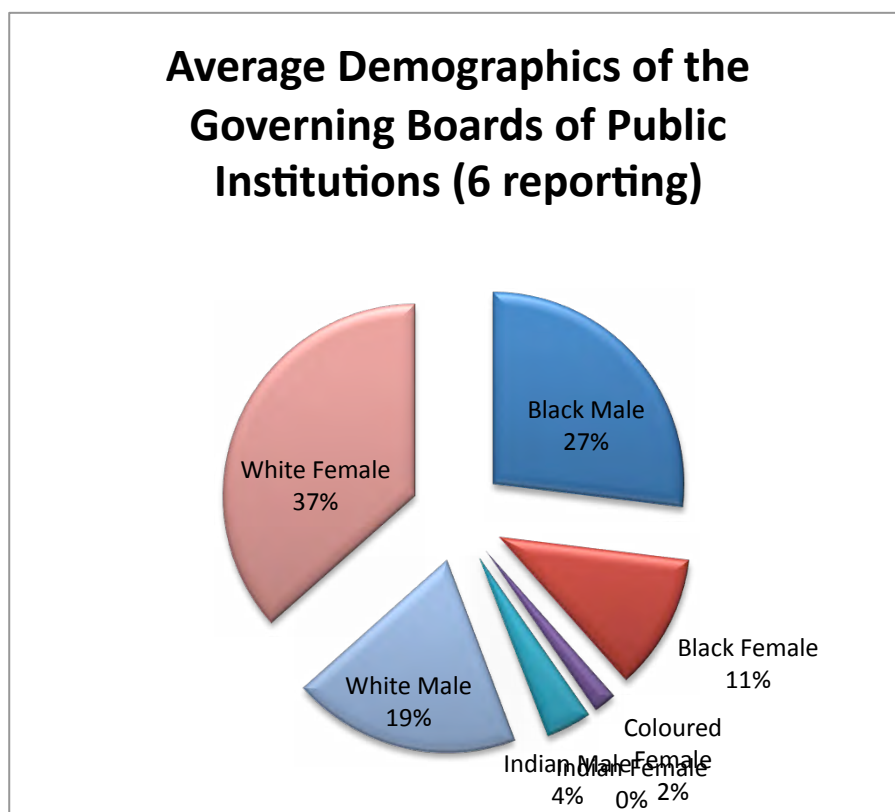
However, as the chart above demonstrates the relative prevalence of Black board members does not translate into absolute numbers: in the majority of Boards surveyed, Black members occupied minority positions in numerical terms.

### 1.3.1 The Demographics of governing Boards (Charts)

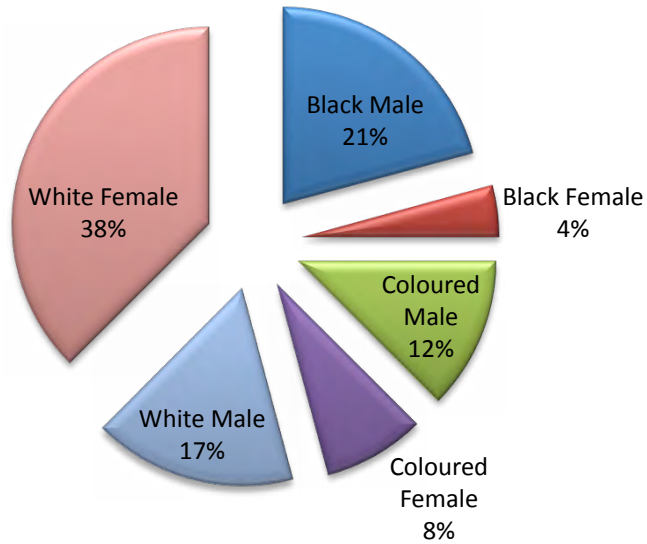
When broken down into public, university-based, and private institutions then demographic picture is refined. The following charts suggest that certain groups – notably, White women, Black men, and White men – are consistently represented across public, university-based, and private institutions; other groups – notably Indian and Coloured men and women – are irregularly represented. Black women are systematically under-represented in these demographic reports, however, whether by comparison to Black men or White women.

Private institutions, notably, were least likely to have representation from minority groups on their governing boards.

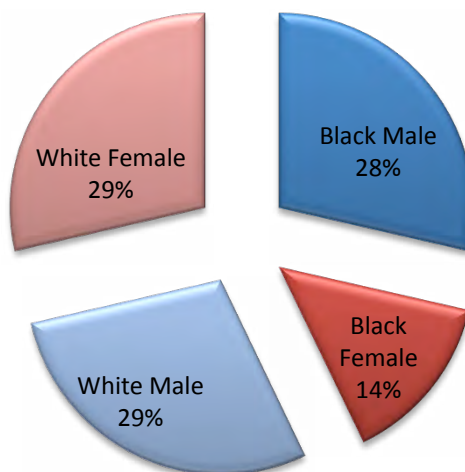
Public institutions reported the largest boards, by number of members. The membership of these boards thus represents the majority of participants in this sector of arts management.



### Average Demographics of the Governing Boards of University-based institutions (5 reporting)



### Average Demographics of the Governing Boards of Private Institutions (4 reporting)



## 2. Staffing

**NOTE:** Approximately 80% of the survey’s respondents provided detailed responses to questions about staffing. The small number of non-responses came mostly from the private sector and may represent either the complexity of discussing staff allocation within a large corporate (or university) environment or – notably in the case of corporate collections – a greater level of confidentiality and non-disclosure than in the public sector.

The breakdown of responses is as follows: out of 13 public institutions, 10 institutions responded; out of the 8 university-based institution, 7 responded; and out of 6 private institutions, 4 responded.

### Staffing numbers (21 reporting)

	Senior Management	Middle Management	Specialist/ Technical	Ancillary/ Support	TOTAL
<b>Public Institutions</b>	6	13	18	60	97
<b>University-based Institutions</b>	9	9	5	22	45
<b>Private Institutions</b>	3	3	1	11	18
<b>Total</b>	18	25	24	93	160

### 2.1 Staffing numbers

**Senior Management:** A third (33%) of the respondents to this section of survey indicated that they employed one or more people in senior management roles. The majority of these – 66% - employed only one person in such a role; of the remaining third, 22% indicated that they employed 2 people in senior management roles and 11% indicated that they employed three such people.

**NOTE:** A significant proportion of the respondents – approximately 66% of the total number of respondents to this section - either left this section of the survey blank, or explicitly stated that their institutions did not employ any senior managers. In telephone interviews it became clear that some respondents were uncertain of how their particular management structures compared with other institutions’ structures, and thus often chose to downgrade their manager’s particular responsibilities to ‘specialist middle management.’ Others indicated that their bureaucratic human resources structures – whether public or private – did not place their divisional management at a senior level within the entire, broader institution. The absence of these responses should not be taken to indicate, therefore, that these institutions are without responsible senior management.

**Specialist Middle Management:** Two-thirds (66%) of the respondents indicated that they employed one or more people in specialist middle management positions. Of these, 66% employed only one person in this role, while the remaining 33% employed two such people. None employed more than two.

(For potential complications in this category, see the note directly above.)

**Specialist Technical:** Half of the respondents reported employing people in specialist technical positions – ranging from education officers to conservators and curators. Approximately 55% of

these respondents employ only one person in such a position; 22% employ 2 people; and a further 22% employ either 3 or 4 people in these positions.

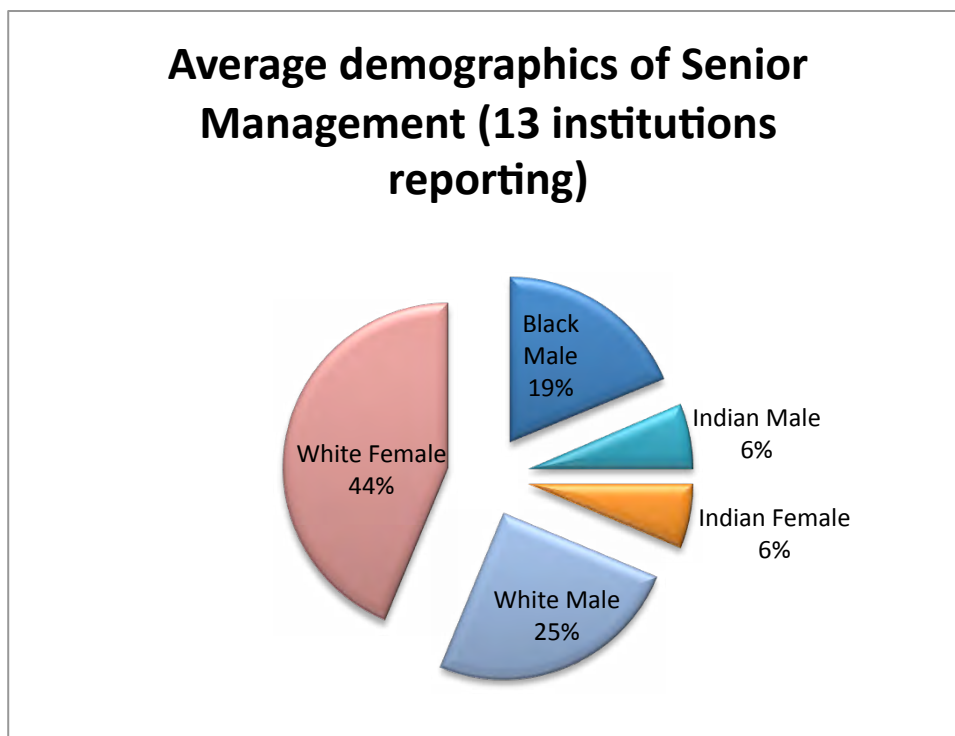
It must be noted, however, that half of the respondents to this section of the survey indicate that they do not employ any specialist technical staff – which may have an impact on their ability to maintain and present their collections, as noted in later sections of this report.

**Ancillary and Support:** Almost 80% of respondents indicated that they employed between 1 and 10 people in ancillary and support staff positions. Of these respondents, just over a fifth – 22% - indicated that they employ only one person in such a position; 28% currently employ 2 people in these positions. The number of support staff in each institution is then evenly spread between 3 and 10 people, with no institutions having more than 10 support staff.

## 2.2 Staffing Demographics

Amongst the original group of surveys, the majority of institutions provided information about staff demographics. In the second group of abbreviated surveys (see Research Note), however, this information was not solicited. The following sections are thus based on responses from between half and two-thirds of the total sample and should be treated with appropriate caution. Informal discussions and interviews, however, suggested that the patterns indicated in this analysis of the partial responses may be more generally assumed.

### 2.2.1 Senior Management

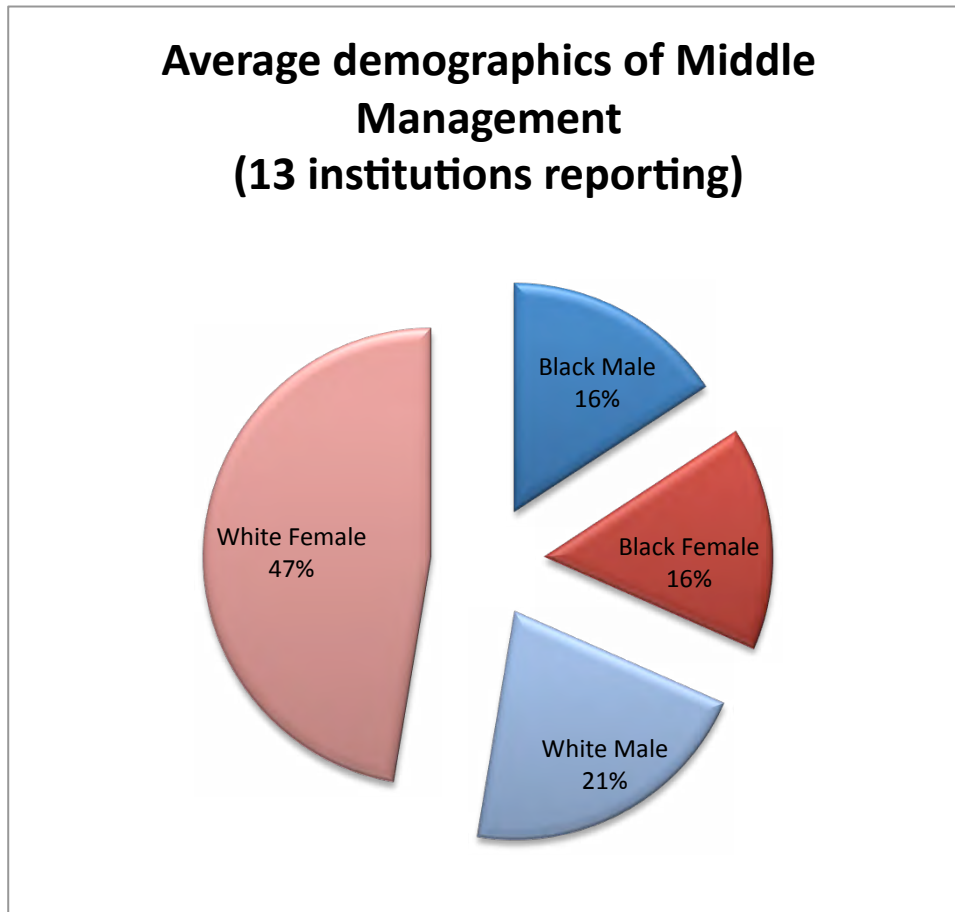


**Senior Management:** A fifth (19%) of the institutions reporting the presence of senior management positions have filled these positions with Black, male candidates. One institution is managed by an Indian female, and one by an Indian male. The remainder of the institutions – approximately three

quarters of the respondents – are managed by white males and females. Making allowance for the presence of more than one senior management figure in certain institutions, there are double the number of white females than white males in these positions. No respondents report having any Coloured senior managers. Nor do any respondents report employing any Black females in these senior management positions.

All but one of the senior managers are reported to be over 35 years old.

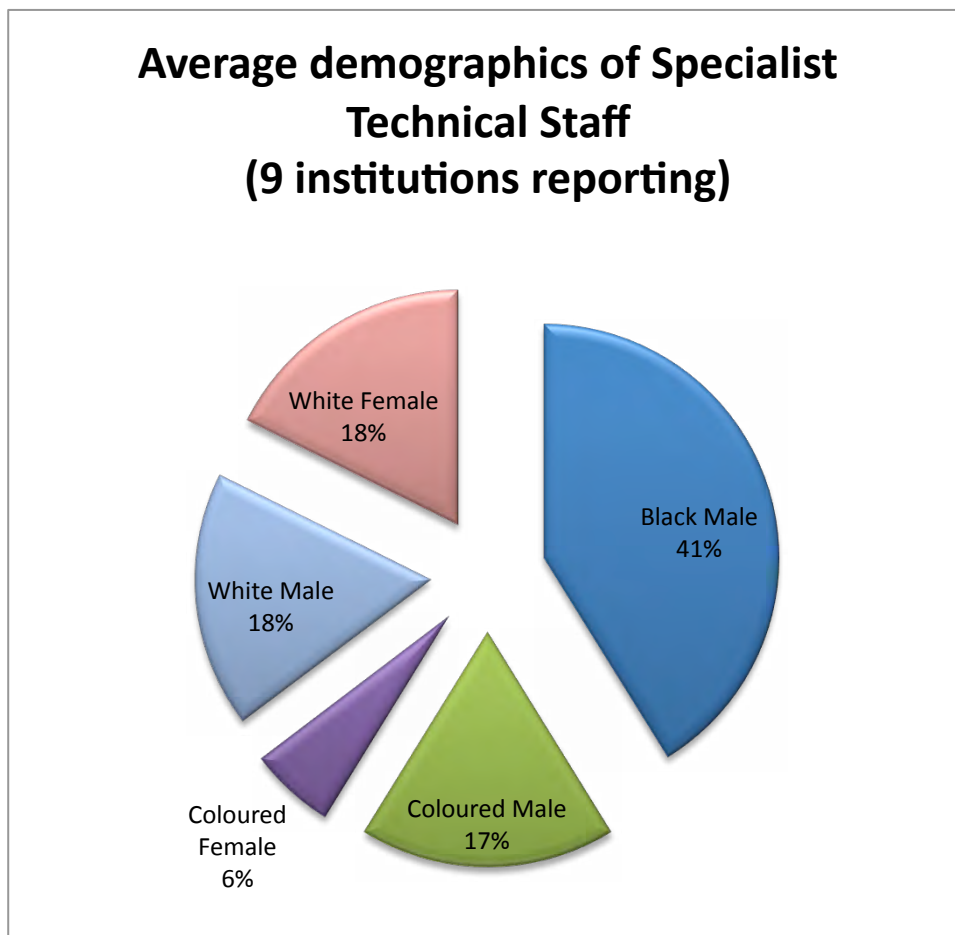
### 2.2.2 Middle Management



**Middle Management:** Just under a third (32%) of respondents report employing Black males and females in middle management positions. However, the remainder of the respondents – 68% of the sample – report employing only White males and females in these middle management positions. No institutions reported employing either Indian or Coloured men or women in these positions. Only one institution reported employing both White and Black middle managers. This clearly suggests that – even more than in senior management positions – middle management is still demographically White.

All those institutions reporting an entirely White middle management also report that these positions are filled by candidates older than 35 years; however, all the reported Black middle managers are younger than 35.

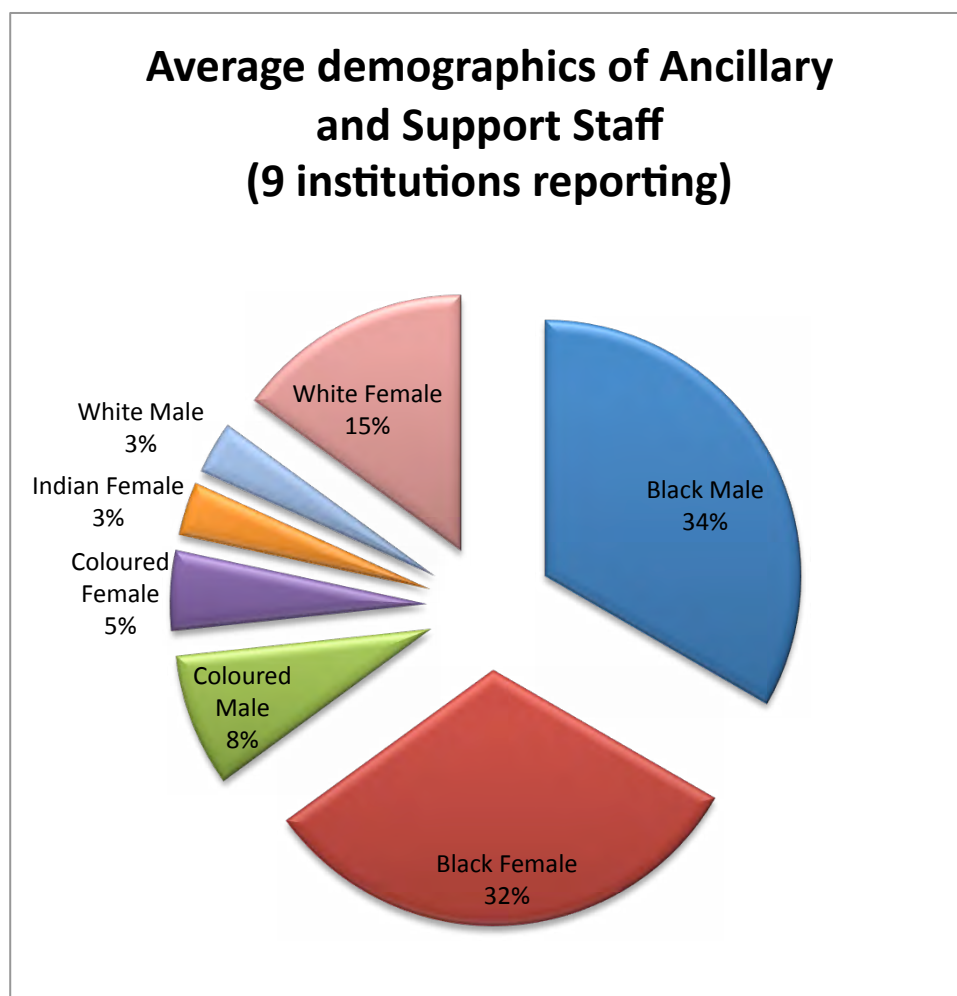
### 2.2.3 Specialist Technical



**Specialist Technical:** In contrast, the single largest group (41%) of the specialist technical positions are filled by Black males. No Black females were employed in these positions at any of the reporting institutions. Coloured males and females filled technical positions at 23% of the responding institutions; two-thirds of these positions were filled by Coloured males. 55% of the respondents also employed White technical staff – split equally between male and female; only 33% of the overall sample only employed White technical staff.

In contrast to senior and middle management, a slim majority of these institutions' specialist technical staff (approx. 55%) are younger than 35.

## 2.2.4 Ancillary and Support



**Ancillary and Support:** Approximately 76% of the responding institutions employ one or more Black males in ancillary positions. 60% of these institutions also employ Black females in these positions. A further 15% of the overall responding institutions employ Black females, but not Black males, in ancillary positions. In total, then, just over 90% of all responding institutions employ Black ancillary and support staff – far more than the percentage that employ Black men and women in specialist or management positions.

It is worth noting that approximately 55% of surveyed institutions employ White men and women in ancillary positions – in all but one case in addition to Black employees. The clear majority of these positions are filled by White women, however, with only one White male reported as being employed in an ancillary position. Two of the surveyed institutions also employ Coloured men and women in these positions, with a Cape-based museum accounting for 6 of the 7 such Coloured employees. (The majority of these are male.)

Just over two-thirds of these positions are filled by men and women older than 35.

\*

**Education:** Of the responding institutions, 75% reported employing one or more people with postgraduate qualifications. Of these, 42% only employed one such postgraduate, while 25% employed two and the remaining 33% employed three such postgraduates.

Half of the responding institutions indicated that they employed people with undergraduate university educations. Two thirds (66%) employed staff with a high-school or primary-school level qualification; almost all responding institutions – bar two – recorded employing people with no formal qualification.

### **2.3 Staff Benefits and Training**

All but one of the responding institutions reported that they provided their staff with benefits over and above their salaries. (The one exception is a privately-run Section 21 collection, employing only one staff member.) The most common such benefits were medical aid packages (provided by 85% of respondents), pension/provident fund (provided by 77% of respondents) and unemployment insurance (also provided by 77% of respondents). There was no notable discrepancy between public and private institutions.

All respondents reported offering their staff access to some form of further training/education, whether in-house or external. Curatorial practice and conservation skills were the two most commonly reported forms of training offered: approximately 72% of the respondent offered both. Following this, approximately 58% of respondents also offered training in education and outreach skills to their staff. Approximately 40% also offered business and financial training skills. Although there was no major discrepancy between public and private institutions, it is perhaps notable that private institutions were somewhat more likely to offer a wider range of potential training programmes to their staff.

### **2.4 Volunteer Support**

Less than half of the respondents reported either having a formal Friends Organisation or any alternate form of Volunteer Support. Here, there is a clear split between public and private institutions. Only one private institution has formal Friends Organisation, aimed primarily at disseminating information and fundraising rather than at providing volunteer support. Likewise, only one other private institution records having volunteer support without such an organisation; this institution is based at a university and makes use of student volunteer support – placing it in an ambiguous position regarding this work.

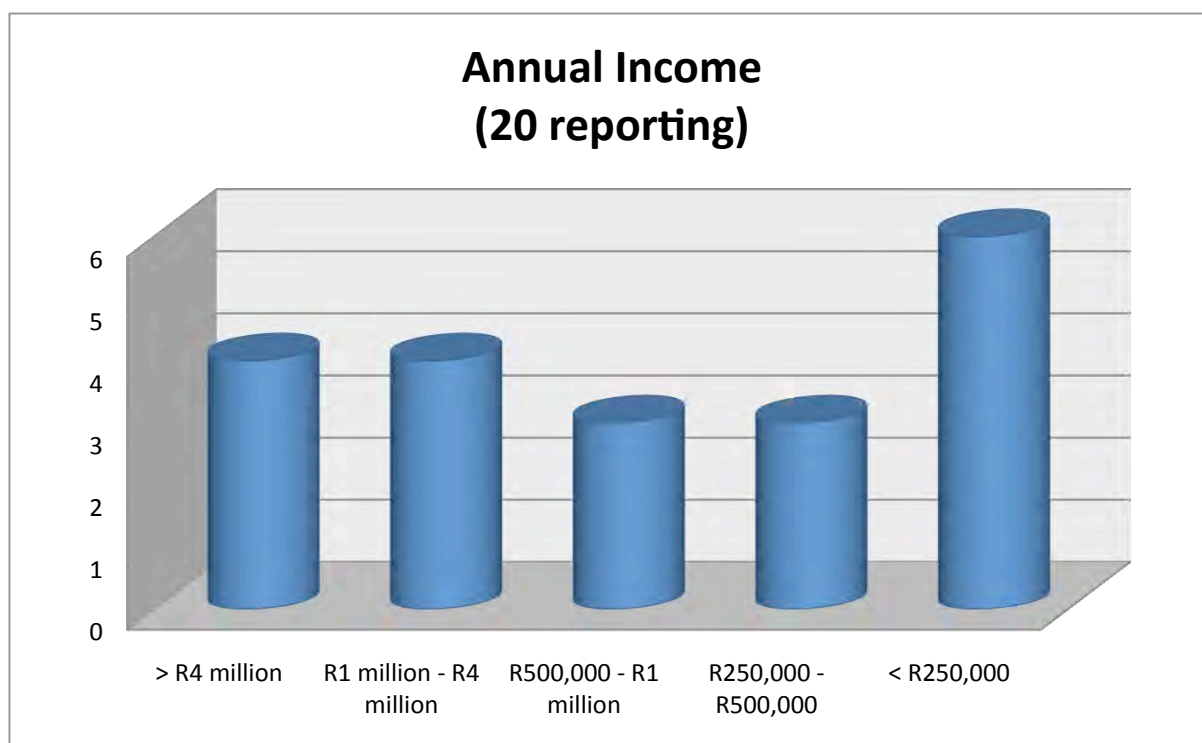
Of the public institutions responding to this question, however, three-quarters recorded having a formal Friends Organisation – although slightly less (approx. 62%) reported having volunteer support available. This suggests that these public organisations are far more proactive in organising both volunteer support and public membership programmes.

Amongst those institutions reporting the presence of volunteer support, these volunteers were almost evenly split between adult and student volunteers. Only one public institution reported using senior citizens as volunteers. This suggests a significant shift in the demographics of volunteer support for museum and collections, with a younger volunteer base suggesting the ability of these institutions to successfully engage with new audiences.

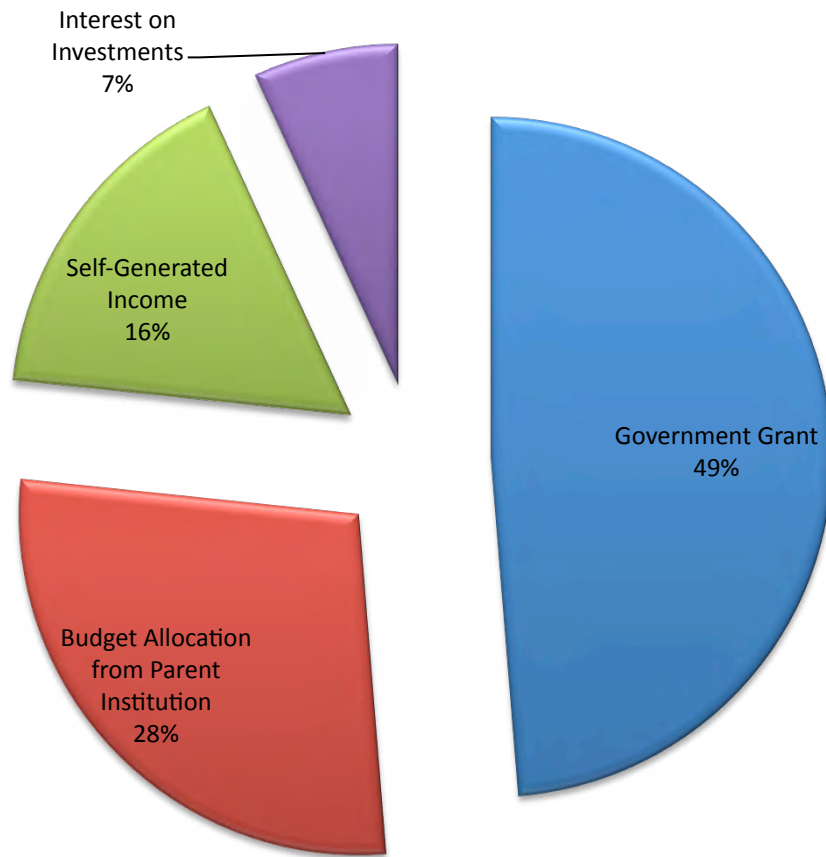
### 3. Finances

**Note:** Not all responding institutions were either able or willing to provide detailed financial information. Private institutions, in particular, were chary about revealing specific figures or breakdowns of income; it appears, however, that these institutions share at least one characteristic with university-based institutions (which were, in general, more willing to disclose financial data) – both derive the majority of their budgets from a central institutional allocation. Public institutions were significantly more likely to provide financial data; however – as is made clear in the section beneath – the nature of their income/expenditure can differ dramatically from institution to institution. Some public institutions receive a single grant, from which all expenses are allocated, while other public institutions receive targeted grants – and certain expenses, including notably salaries and building maintenance – are centrally and separately allocated by municipalities and other government institutions. This suggests that conclusions should be drawn with caution,

#### 3.1 Income



## Distribution of income sources (19 reporting)



Amongst public museums and collections, the reported figures for the most recent annual budgeted income varied wildly. All institutions reporting an annual income of over R4 million were public museums; nonetheless, several other public institutions reported incomes of well below R250,000 – including one which registered an income of no more than R25,000.00. Follow up interviews suggested that the large discrepancy was a result of different budgeting practices within their respective municipalities. The larger figures are generally inclusive of salaries and running costs; the smaller figure are not – in these cases, these significant costs were centrally administered by the municipality. (The following section – on expenditure – will address the proportion of these costs in general budgets.)

Other reporting public institutions received a six-figure annual income. Of these public institutions, approximately 70% reported that over 80% of this income came directly from government grants; only one institution earned the majority of its income off interest derived from investments. This figure is substantially higher than the overall income distribution figure, displayed above, confirming that government grants are central to the continuing existence of public institutions.

University based institutions indicated that the majority of their budgets were centrally allocated. Only two registered an income of between R1 million and R4 million; it is worth noting – in advance of the following section – that both pay staff salaries out of this budget. The remaining institutions reported budgets ranging across the two lower categories on the above chart; the lowest reported budget was R100,000.00 per annum, while the highest budget of the remaining institutions was R350,000.00 per annum. Neither of these institutions, however, were liable for building or salaries expenses, these being administered centrally within their larger parent institutions.

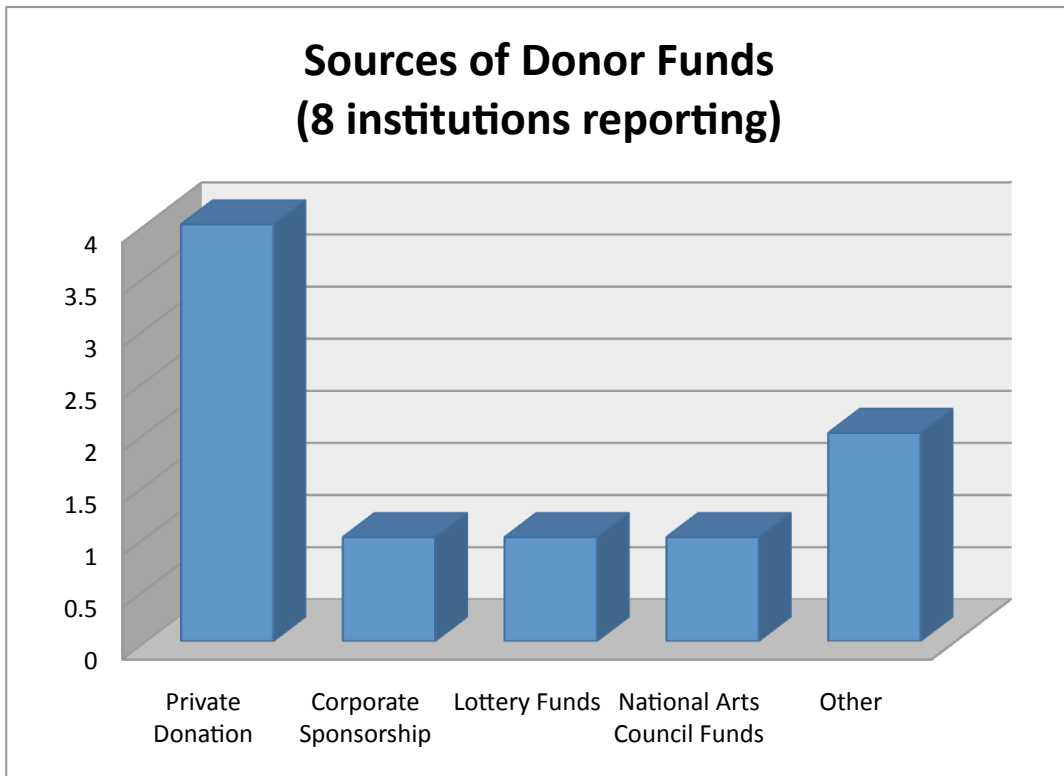
Only two private collections responded to this question, reporting budgets of R1 million and R600 000.00. One of these institutions reported deriving the majority of its income from a government grant: this institution is a section 21 company, and presumably receives the majority of its income from public sources; the other respondent derived the majority of its income from a central allocation. A lesser proportion was self-generated income.

It is worth noting that alternative sources of self-generated income – venue hire, catering, and shop sales – were of negligible to no importance in the public sector. Occasional venue hires provided a small source of income – well below 10% of the total income – to some public institutions. Interestingly, university-based institutions reported the most frequent occurrence of this form of income, with one institution deriving the majority of its budget from venue hire. During discussions, it was clear that for many public institutions the bureaucratic structures within which they operate make it extremely difficult to set up and maintain independent – and thus not centrally-regulated – income streams, such as museum shops and cafes. Universities appear to be more flexible than municipalities in this regard.

### **3.2 Supplementary Income (Donations)**

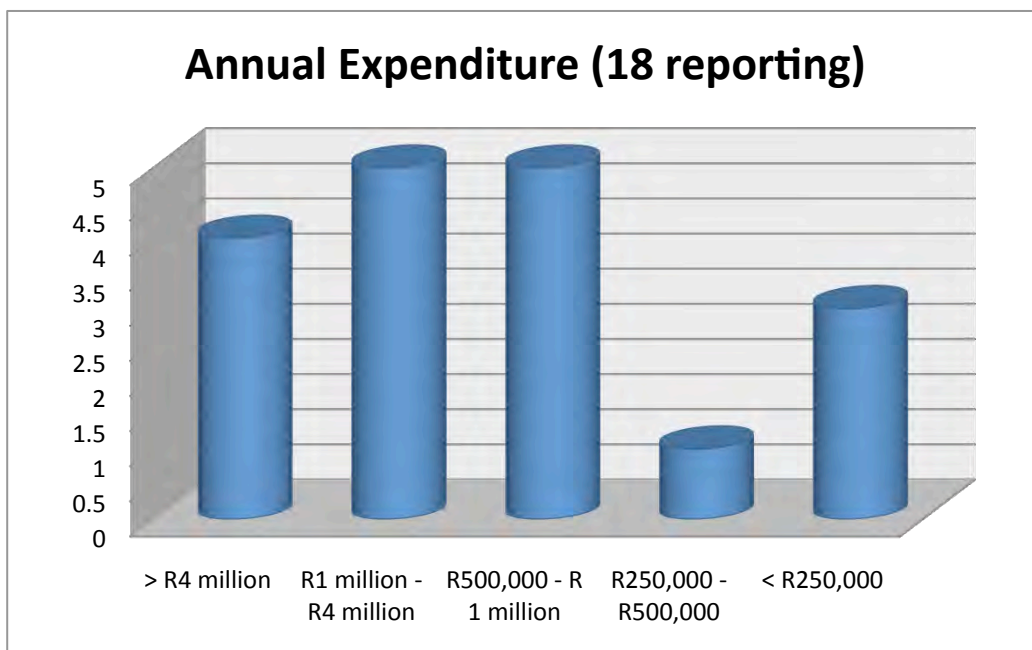
**Note:** Questions about the sources of donations were only asked in the first wave of the questionnaire; the second – abbreviated round – only asked whether any income was derived from donations. None of the respondents in this round indicated that this was case. Donor funding, in this instance, excludes the purchase of individual artworks and refers only to direct financial grants – which may or may not be hypothecated for specific uses.

A minority of respondents (8 out of the 20 reporting some form of financial information) thus indicated that donor funding had been received in the past year. The majority of the respondents (5 out of 8) were public institutions; only one university-based institution reported having received such funding. Both private institutions reported receiving donor funds. A small number of the institutions reported receiving funds from more than one source; most, however, received only one form of sponsorship. The following chart shows the most common sources of funding reported in the course of this survey.

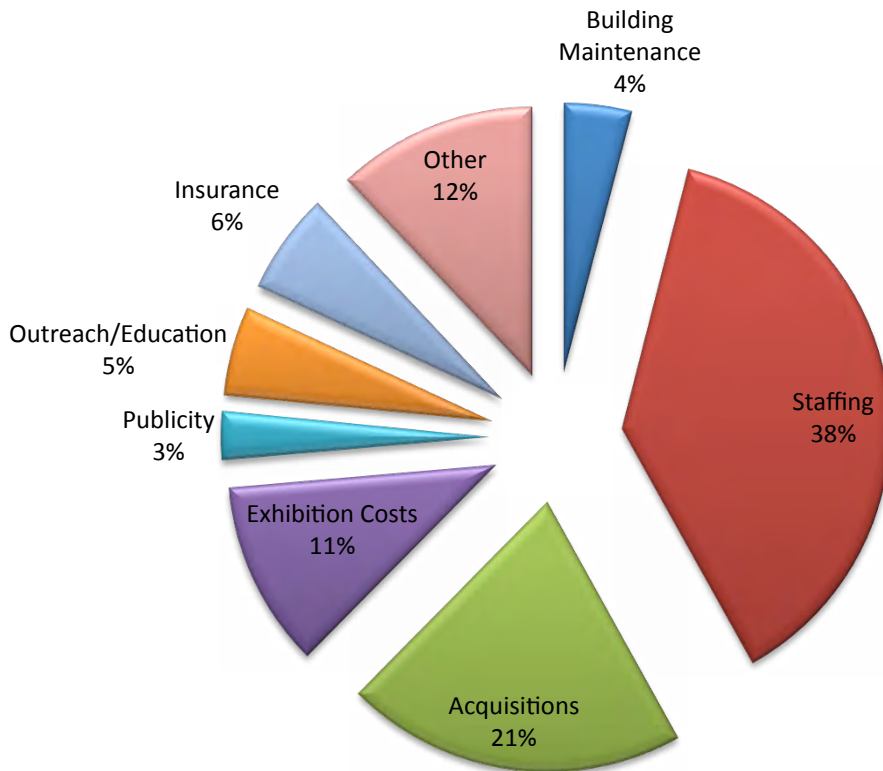


Approximately half of these donations came from private sponsors. Neither the National Lottery nor the National Arts Council played a significant role in funding institutions in the period covered by this survey. While this may be a consequence of bureaucratic troubles in both institutions, it is nonetheless a worrying finding – suggesting that the funds from these institutions are not reaching the museums sector.

### 3.3 Expenditure



## Breakdown of Expenditure (18 reporting)



Amongst public museums and collections, reported levels of expenditure differed significantly – although in a pattern highly similar to that discerned for reported levels of income, noted above. This pattern illustrates the complexities of certain public bureaucratic accounting structures, and the difficulties faced by these institutions in accurately reporting income/expenditure patterns when parts of their budgets are centralised and others not.

In general, it appears that public institutions spend between 90% and 100% of their reported budgeted income, in so far as this is possible to determine. The single largest proportion of their budgets – as it was across all institutions – was dedicated to staffing costs, with over 60% of the respondents reporting that 45% or more (up to 80%) of their budgets were dedicated to staffing costs. Exhibition costs and acquisitions costs constituted the majority of the remaining budget categories; it is notable that acquisitions constituted a significantly larger proportion of the budget amongst those institutions which do not pay staffing costs out of their allocated budget.

This pattern – of higher acquisitions budgets amongst institutions without responsibility for staffing costs – is replicated amongst university-based institutions. In general, acquisitions budgets represent a relatively low sum of money – representing the highest proportion within the smallest budgets, and far smaller proportions within larger absolute budgets.

\*

Costs associated with staffing were by far the most significant sources of expenditure, followed by costs associated with acquiring new artworks, and organising exhibitions. These were noted across all responding museums and collections, with no notable observable difference occurring between public and private institutions in these matters.

The minimal expenditure on education and outreach programmes by all institutions is particularly noteworthy. No public institution spent more than 10% of their total expenditure on these programmes; only two institutions reporting as private – a private museum and a university-based museum – reported spending more than 10% of their total expenditure on these programmes. This suggests that – across both public and private institutions – education and outreach programmes do not take up a significant proportion of these institutions’ annual expenditure. Similarly, expenditure on publicity is notably low.

### **3.4 Replacement Value of All Assets**

Although the majority of respondents to this section of the survey were willing to answer this question, only one public institution was able to provide a specific figure. The remainder of the public institutions provided estimates ranging from seven to nine figures. The lowest response was R1.5 million – from a recently established municipal museum; this was an outlier, however, as the next lowest response was R15 million. Other estimates ranged from R100 million to ‘billions’. (It may be noted here that although respondents were able to provide detailed responses on the value of their collections – see Section 4 – few were able to more than speculate on the total value of assets associated with their museums.)

Private institutions, however, were able to provide more specific responses, although these were also all necessarily rounded-off estimates. These ranged from R1million – an outlier – to R33 million, R235 million and R500 million.

Only one respondent was willing to speculate on the value of any debts held by the institution, with most responding either that such debts did not exist or could not be reported. It is thus impossible to draw any conclusions on this particular question.

## 4. Collections Management

### 4.1 Size of Collection

	Number of Institutions reporting	Total Number of Artworks Reported	Average number of works in a Collection
<b>Public Institutions</b>	10	52,589	5,259
<b>University-based Institutions</b>	8	40,436	5,055
<b>Private Institutions</b>	6	7,180	1,197
<b>Total</b>	24	100,205	4,175

(This excludes one cultural museum, reporting 60,000 cultural objects – which would significantly skew the reported figures of all other museums. It is difficult to determine how many of these objects could be directly compared and contrasted to the works owned by other institutions. This museum is based in a university environment.)

The largest reported collections come from cultural and historical museums rather than those with an exclusively fine-arts focus. These are the only museums reporting five-figure collections, with two reporting collections of 16 000 and 18 000 objects, artworks, and artefacts. Amongst the exclusively fine-arts-based collections, the majority consisted of between 2 000 and 4 000 artworks, with a small number registering approximately 9 000 artworks. There is little significant discrepancy between the sizes of private and public collections, with a similar spread of reported results occurring in both categories.

### 4.2 Value of Collection

	Number of Institutions reporting	Total Value of Artworks Reported	Average value of works in a Collection
<b>Public Institutions</b>	7	R690,399,316	R98,628,474
<b>University-based Institutions</b>	7	R328,500,000	R46,928,571
<b>Private Institutions</b>	3	R131,900,000	R43,966,666
<b>Total</b>	17	R1,150,799,316	R67,694,077

The majority of the responding institutions (85%) have had their collections professionally valued. The remaining 15% include cultural museums, a university-based collection and a recently-established municipal museum. These appear to represent relatively unusual collections, either with a large number of individual cultural artefacts or too new to have established a collection sufficiently substantial enough to warrant professional valuation.

A small number of public institutions were either not able or not willing to disclose the total value of their collections. The remainder, however, were able to provide estimates of this figure. The largest and oldest of the responding institutions valued its permanent collection at R400 million for insurance purposes; several equivalent institutions could not respond to this question, leaving this as

an outlier, although one other did estimate its collection to be worth approximated R100 million. More recently established public museums estimated their collections to be valued at between R14 million and R72 million.

Most of the university-based institutions were willing to provide an estimate of the value of their collections. These ranged from R4.5 million to R100 million. Private institutions were less willing to disclose the total value of their collections; however, amongst those that did the largest – of R126 million – counted for the vast majority of the value reported.

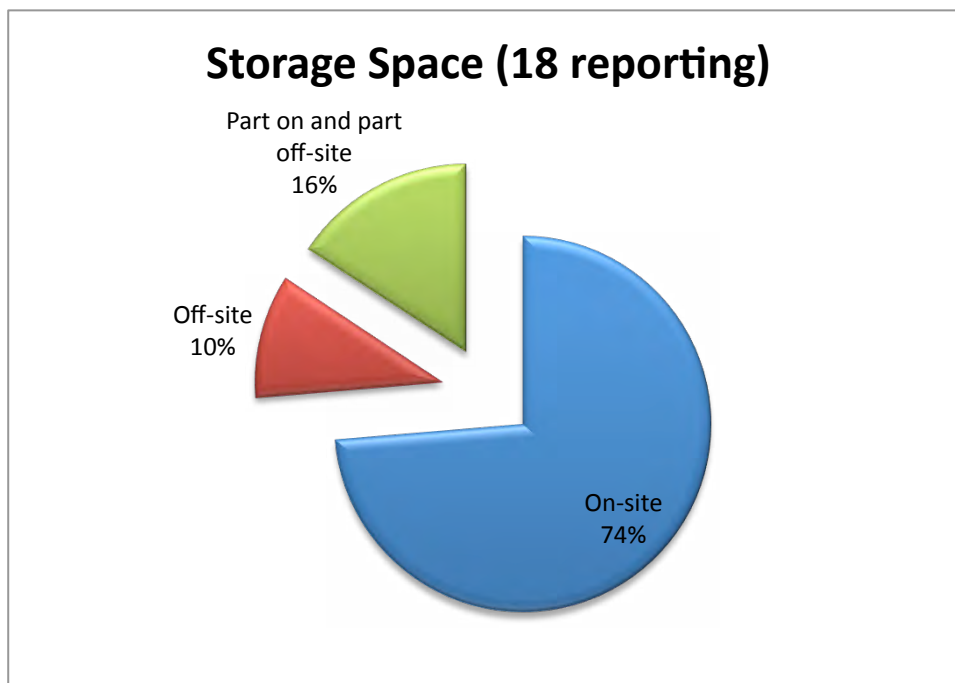
The value of private collections thus tend to be spread more evenly than those of public collections, and to be – in general – slightly lower than the highest reported figures for public collections. Given the relative age of these institutions – with some public collections reaching back into the nineteenth century, while few of the private collections are nearly so old – this is not necessarily surprising. (See the Section 5: Acquisitions for further notes.)

### 4.3 Collections Management

Storage Space:

The vast majority of the responding institutions reported having a space dedicated to the storage of their permanent collections. (The one dissenting respondent has its entire collection on permanent display.)

The majority of these respondents (74%) house this storage space on their own permanent premises, while only a minority have to house their collections on another site:



Cataloguing:

The majority of the respondents (84%) employ one or more people to manage, catalogue, and maintain the physical integrity of their collection. More than half of these respondents employ only one such staff member; a quarter employ two such dedicated staff members; and the remainder employ either three (12.5%) or four (6.25%) dedicated staff members.

A large number of institutions continue to maintain a physical catalogue – either a card catalogue or a log book – of their collections, although it should be noted that most of these institutions supplement this with a computer catalogue of some form. Noted brand-name computer cataloguing programmes – including Star and Microsoft Access – accounted for less than half of the responses. It appears that the majority of computer cataloguing is not done in dedicated programmes, therefore, but is most probably a computerised log book.

## 5. Acquisitions

### 5.1 Acquisitions Budgets

	Number of Institutions reporting	Reported total acquisitions budget	Average acquisitions budget
<b>Public Institutions</b>	9	R2,055,000	R228,333
<b>University-based Institutions</b>	7	R1,995,000	R285,000
<b>Private Institutions</b>	3	R460,000	R153,334
<b>Total</b>	19	R4,510,000	R237,368

The vast majority of the respondents (95%) reported that their institutions continued to acquire new works for their permanent collection. The budgets allocated to such new acquisitions, however, varied dramatically between institutions.

Amongst public institutions, more than a third of the respondents were either unable to provide information about their acquisitions budget or – more significantly – reported having no such allocated budget. These institutions all continue to acquire work – but are, however, dependent on donations and once-off sources of funding to acquire new works.

Among those public institutions recording the presence of an acquisitions budget, the reported size of this budget clustered in two ranges, from a lower end of R5 000.00 to R11 000.00 per annum (reported by small municipal museums). The second range – reported by well established municipal and national museums – ranged from R140 000.00 to R300 000.00 per annum. The highest response - of R1 million per annum – came from a university based museum, and represents an extreme outlier in this section of responses.

Amongst private institutions, only one collection (a Section 21 non-profit) reports the absence of an acquisitions budget. Once again, the reported size of the dedicated acquisitions budgets cluster into two groups.

## 5.2 Recent Acquisitions

	Number of Institutions Reporting	Number of new works acquired	Average per institution	Number of new works donated	Average percentage donated
<b>Public Institutions</b>	10	306	31	156	51%
<b>University-based Institutions</b>	7	173	25	132	76%
<b>Private Institutions</b>	5	202	40	30	15%

Amongst the public museums reporting the availability of an acquisitions budget, one third bought no new artworks in the previous twelve month period. In one case – that of a university collection with a significant acquisitions budget – this was explicitly linked to a change in management, and a corresponding period of institutional uncertainty. This should not be taken as a normal year in this organisation’s functioning, in other words.

Of the remaining public museums and collections that did purchase (or otherwise acquire) works in the previous twelve months, approximately one third reported acquiring only one new work. A similar number acquired under 8-10 works, and a final third acquired 12-19 works. (One outlying institution recorded a donation of 1325 cultural artefacts, but this can be safely recorded as an exceptional circumstance and no reflection on normal patterns. It is therefore not included in the chart above.)

Approximately 60% of the responding public institutions reported that a number of their new works had been donated, all by private individuals and none by corporate sponsors. These donations constituted between 33% and 100% of their recent acquisitions, and were reported as having values of between R80 000.00 and R100 000.00. (A notably low number of institutions reported the value of their donations, however.)

In contrast, all of the private institutions surveyed reported having acquired new artworks in the previous twelve months. These recorded acquiring either between 22 and 40 artworks, or between 60 and 73 artworks respectively – each group thus reporting significantly more acquisitions than those reported by any public institution.

All the university-based collections reporting registered receiving donations in the past twelve months. Of these, only one institution reported receiving donations from a corporate sponsor – in this case, of 70% of the institution’s new acquisitions. The value of these donations was estimated to be R650 000.00. The remainder of the donations to these collections were made by private individuals, and were estimated to be worth between R12 000.00 and R1.8 million.

## 5.3 Acquisitions Policies

The vast majority of the respondents (approximately 90%) reported having a formal acquisitions policy. Amongst public museums and collections, 60% reported prioritising the acquisition of local

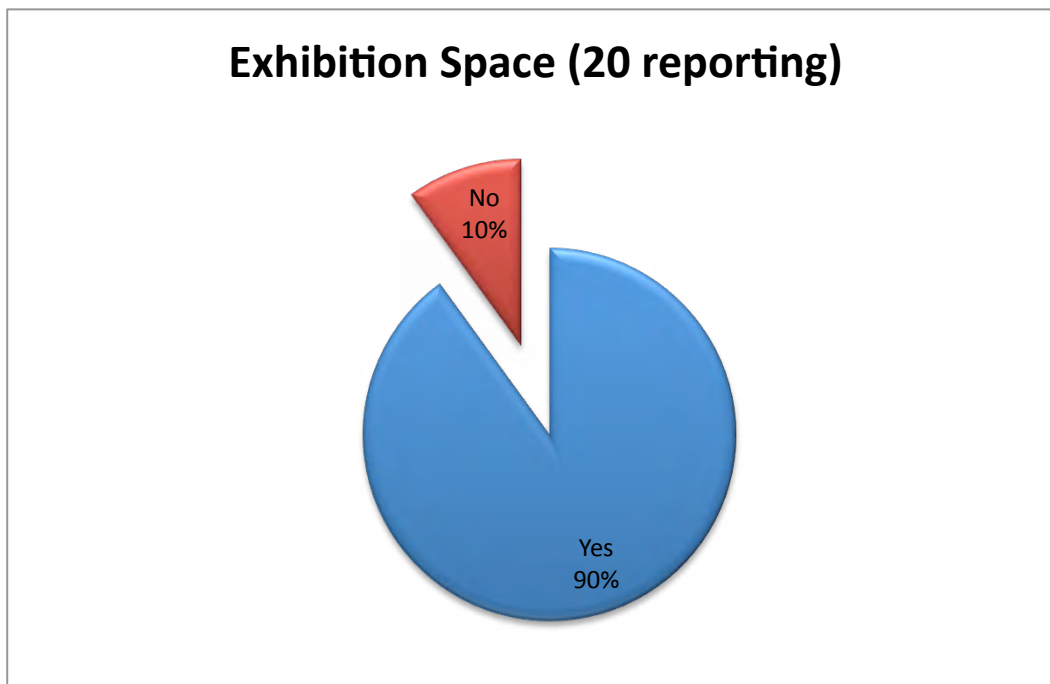
and regional artworks; a third of this group also placed artworks categorised as South African national on their list of priorities. A further 20% prioritised these national artworks, while another group included works from the remainder of the African continent on their list of formal priorities.

Amongst private museums and collections, only one respondent indicated that the acquisition of local and regional artworks was a formal priority. The remainder of the surveyed institutions indicated that they prioritised South African national artworks.

This suggests that private collections have significantly different acquisitions priorities, drawing upon a wider range of artists and artworks than many public collections – which prioritise the collection and representation of diverse range of regional artists and artworks.

## 6. Exhibition Programming

### 6.1 Exhibition Space



Approximately 90% of responding museums and collections report the presences of a permanent dedicated exhibition space or spaces within their institutional premises.

The exceptions to this rule report – in telephonic interviews – that they do not control or own the spaces in which their collections/exhibitions are displayed: one is housed in a large municipal museum, independent of the private collection, while another is displayed in the halls of a public government building. However, these collections do not necessarily have any control over how these works are displayed or curated within these external spaces.

The remainder of the respondents report possessing dedicated exhibition spaces, ranging in volume from 17m<sup>2</sup> to 1 627m<sup>2</sup>. There was no notable disparity between public and private institutions in this matter, and no discernable pattern in the distribution of these volumes.

### 6.2 Exhibitions from the Permanent Collection

All but one of the respondents reported having exhibited part of their permanent collections in the previous twelve months. (The exception was one of the small number of respondents that did not report having its own permanent exhibition space, thus limiting its ability to display its own collection.) Respondents reported exhibiting anything between 0-10% and 90%-100% of their collections in the previous twelve months, and to dedicating a majority of their dedicated exhibition spaces to the display of these exhibitions from their collections.

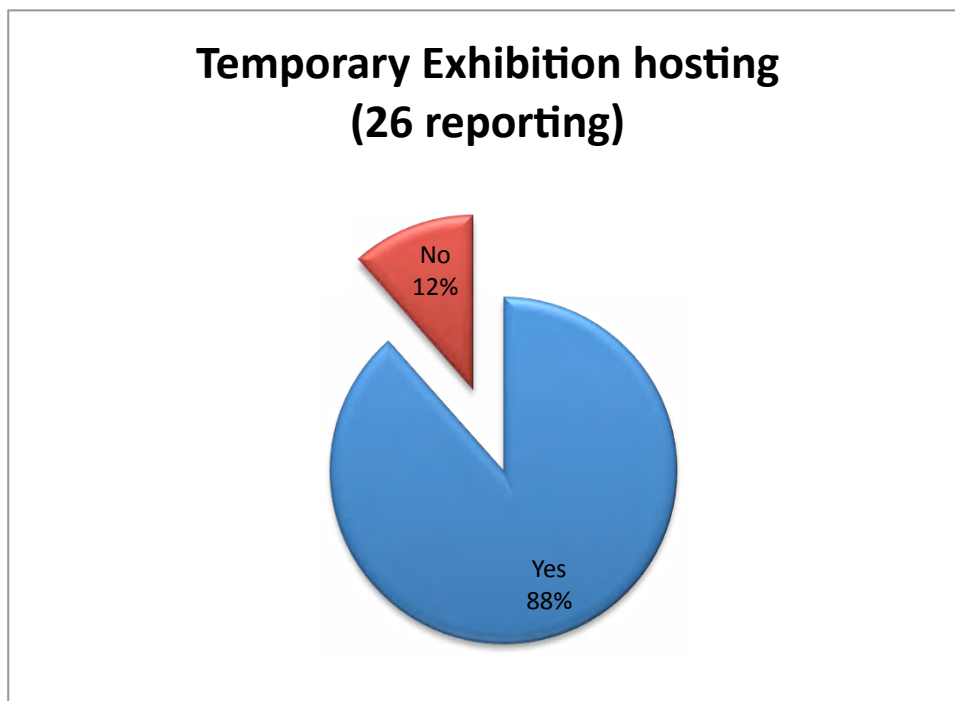
Among public institutions, a third of respondents indicated that they had displayed less than 30% of their permanent collection in the previous twelve months; 22% indicated that they had displayed

between 30% and 50% of their collections; another 22% indicated that they had displayed between 50% and 80% of their collections; while a final 22% indicated that they had displayed between 90% and 100% of their collections in this twelve month period. A slim majority of these institutions therefore displayed less than half of their collections, while only a small number had the vast majority of their collection on display.

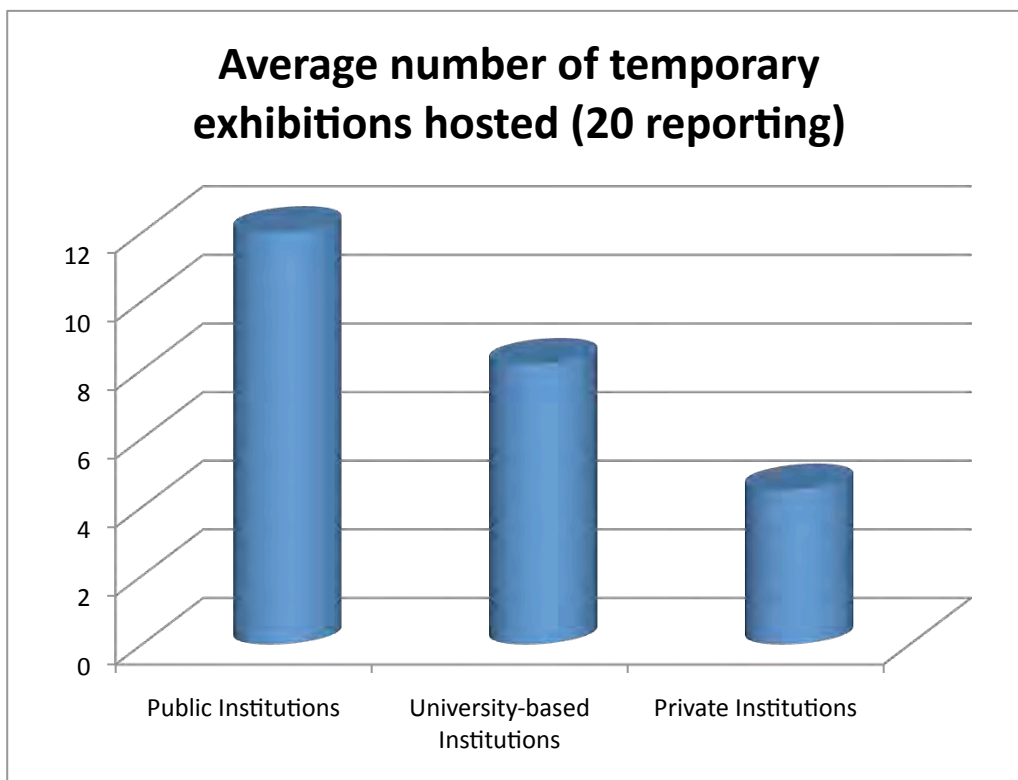
This is in clear contrast to the private institutions responding to the survey. Only one respondent – a university-based collection – indicated having displayed less than half of its permanent collection in the previous year. Just over 40% of respondents indicated that they had put between 50% and 60% of their collections on display that year; another 30% indicated that between 90% and 100% of their collections had been publically displayed in the relevant period. The remainder indicated displaying 60% to 90% of their collections.

It should, however, be noted that this discrepancy does not translate into an equal discrepancy in the relative proportions of these institutions' spaces dedicated to these displays from the permanent collection. Just under 25% of the public institutions reported dedicating less than 20% of their exhibition spaces to displays from their collections; a second quarter reported dedicating between 20% and 80% to these displays, and the remainder of the respondents reported dedicating 80% to 100% of their exhibitions spaces. Likewise, the majority of the private and university-based institutions reported dedicating a majority of their exhibition spaces to displays from the permanent collection – with approximately 42% indicating that between 80% and 100% of their exhibition spaces were thus dedicated.

### 6.3 Temporary Exhibitions



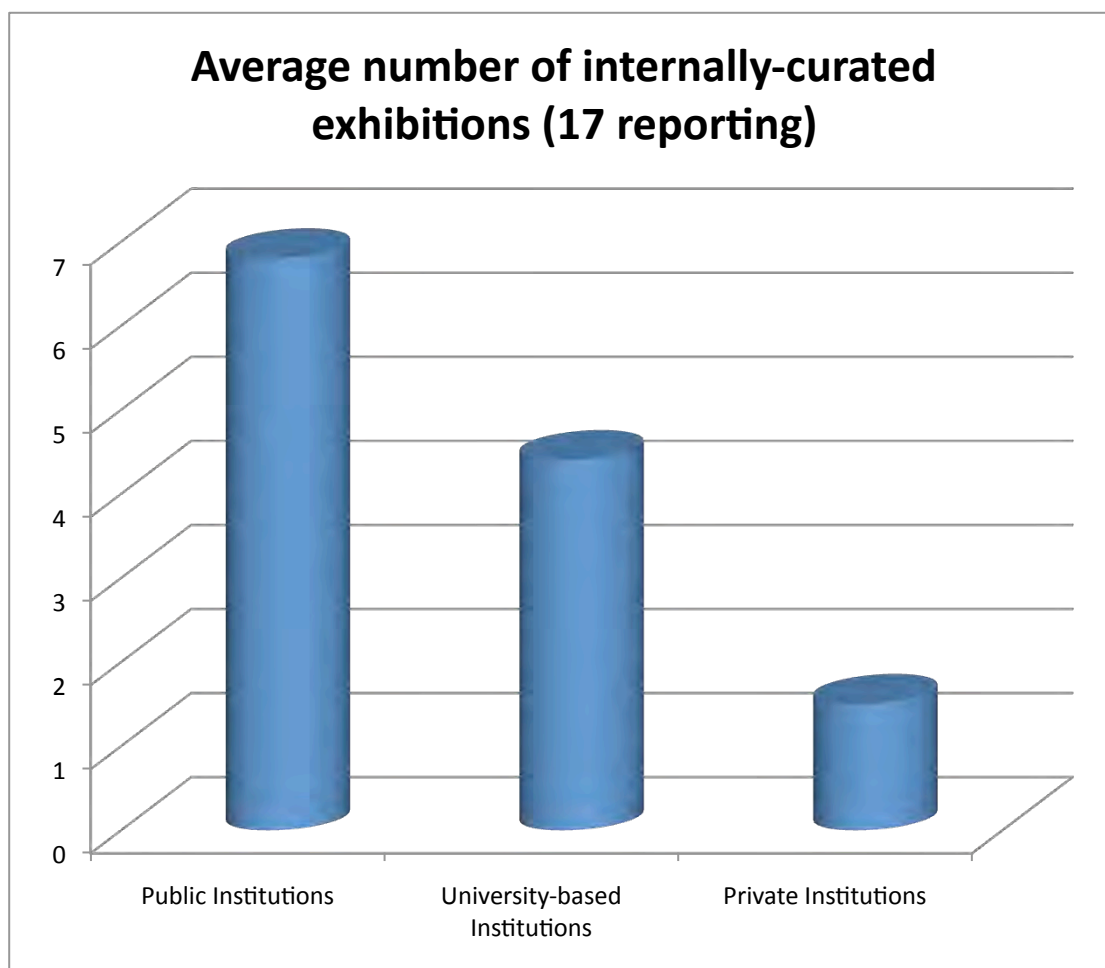
Approximately 88% of all respondents reported having hosted temporary exhibitions in the previous twelve months. (The 12% of respondents that did not host such exhibitions included two public collections without exhibition spaces, and a corporate collection.)



On average, public institutions hosted more than twice as many temporary exhibitions as private institutions did. (Averaging 12 exhibitions to 4.5 exhibitions in the past twelve months.) University-based institutions fell between these two poles, hosting an average of 8.2 exhibitions in the period. The highest number of temporary exhibitions were hosted by well-established municipal museums with large volumes of exhibition space; the two such highest numbers were 20 and 19 temporary exhibitions hosted over the past year.

The next largest group of respondents reported having hosted 10 temporary exhibitions in this period; two-thirds of these respondents were public institutions. The remainder of the responses – both public and the majority of the private respondents – reported hosting between 1 and 9 temporary exhibitions in the previous year.

#### 6.4 Internally-curated exhibitions



All but two of the respondents reporting having hosted temporary exhibitions also reported that one or more of these exhibitions had been curated by members of their own staff.

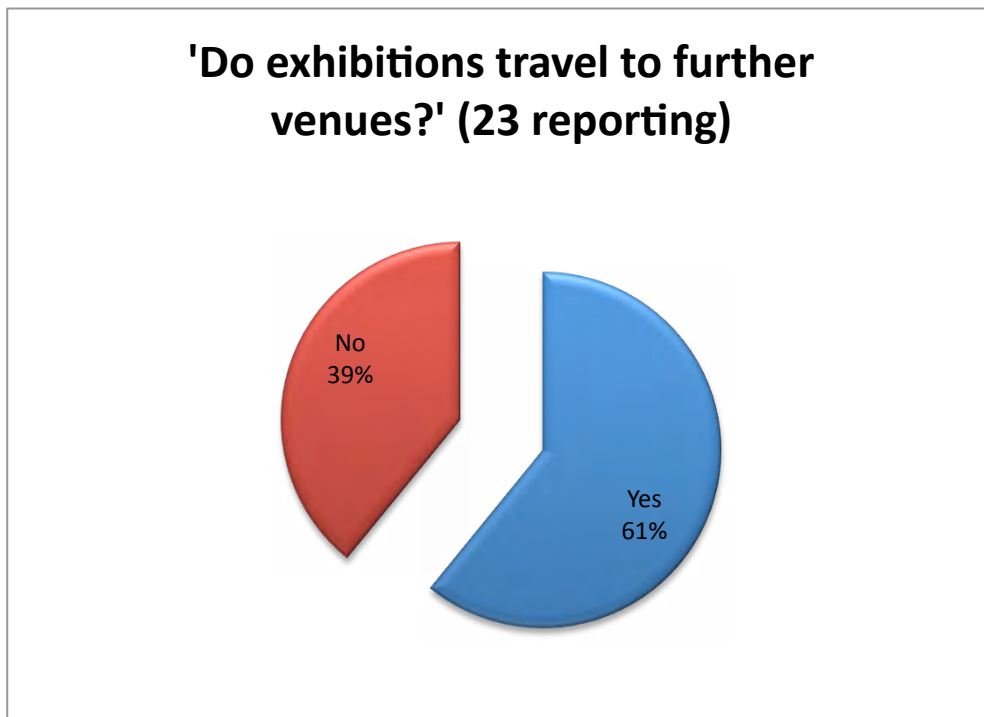
On average, public institutions curated 6.8 exhibitions internally (constituting approximately 56% of the exhibitions displayed at these museums – see figures above.)

Amongst public institutions, those museums reporting the largest number of temporary exhibitions also – unsurprisingly – reported the lowest proportion of exhibitions curated in-house: out of 20 exhibitions, one was thus curated; or out of 19 exhibitions, only four were thus curated. These represent exceptions, however, and the majority of public respondents reported having curated between 33% and 100% of their temporary exhibitions in-house.

University-based institutions curated approximately half of their exhibitions internally. (Reporting an average of 4.4 internally-curated exhibitions out of an average of 8.2 exhibitions displayed in the period.)

Private institutions reported organising a third of their exhibitions internally. It is worth noting, however, that those respondents who reported hosting only one or two exhibitions per year also reported curating all of these exhibitions internally.

The majority of all respondents – both public and private – also indicated that these exhibitions were expected to travel to other institutions:



Amongst public institutions, one third of those that had responded positively had not been able to travel any exhibitions in the previous year – although they indicated that it was normally their practice to do so. Another third indicated that one exhibition had travelled in the previous year, and the remaining third indicated travelling up to 6 exhibitions in the period. These institutions indicated that these exhibitions would each travel to an average of 4 other locations – with the lowest reported figure being one and the highest being seven.

All private institutions reported travelling exhibitions, although approximately 28% did not indicate having travelled any exhibitions in the previous. A quarter of respondents reported having only travelled one exhibition in the previous year, while the remaining respondents all reported having travelled two such exhibitions. They indicated that these exhibitions travelled to an average of 2.8 institutions apiece – with the lowest reported figure being one and the highest being six, with most indicating 2-3 institutions per travelling exhibition.

## 7. Audiences

### 7.1 Audience Size

	Number of Institutions reporting	Reported total number of visitors over the previous year	Average number of visitors
<b>Public Institutions</b>	9	529,411	58,823
<b>University-based Institutions</b>	6	51,707	8,617
<b>Private Institutions</b>	3	19,621	6,540
<b>Total</b>	18	600,739	33,374

The majority of the respondents indicated that they did indeed keep some form of record of the number of visitors attending exhibitions, openings, or other events at their institutions. Well over half of the respondents (18 out of 28) were able to provide detailed visitor figures for the past year.

Among public institutions, visitor figures were notably and significantly higher than they were for private institutions. (These averaged out at 58 823 visitors per annum for public institutions versus 8,617 for university-based institutions and a mere 6 540 for reporting private institutions.) The range of response from public institutions varied, however, with some institutions reporting a relatively low number of visitors – 4 000 to 6 500 per annum – to other institutions reporting much higher numbers – 125 000 to 200 000 visitors per annum. The range of reported figures amongst private institutions was notably narrower: the lowest reported figure was a mere 550 visitors per annum, but the largest was no more than 17 000 per annum. This strongly suggests that public museums and collections remain significantly more accessible than private ones.

### 7.2 Audience Attendance Patterns

Approximately 62% of public institutions indicated that less than 10% of their visitor figures came from audiences attending exhibition openings; only one public museum reported that the majority (60-70%) of its visitors attended these openings and formal functions. One third of these public institutions suggested that over 60% of their audiences were constituted by casual visitors. The remainder of the visitor figures for most public institutions – between 30% and 60% of most institutions reported audiences – attended either school tours or took part in the institutions' various outreach programmes.

Amongst private institutions, casual visitors were by far the most common type of visitors, followed by those on school tours and those attending exhibition openings. Only one private institutions reported that a significant proportion of its audience took part in outreach programmes; most indicated that no proportion of their visitors took part in these.

### 7.3 Audience Demographics

None of the surveyed institutions – whether public or private – collected demographic data on their visitors. A very small number of institutions were willing to speculate informally as to the

demographic makeup of their audiences – but these responses must be treated with great caution, and can have little interpretative value.

However – keeping these cautions in mind – it appears that audiences are almost evenly split between male and female visitors. Most respondents indicated that under 25% of their visitors were either Indian or Coloured. Most indicated that between 25% and 50% of their audiences were black – with none reporting that less than a quarter were black, and some reporting that up to 75% of their audience could be identified as black. Two institutions reported that the majority of their audience – over 50% - were white; the remainder of the respondents suggested that anything up to 50% of their audience could be so described.

There were insufficient responses to distinguish between public and private institutions.

#### **7.4 Visitors' Fees**

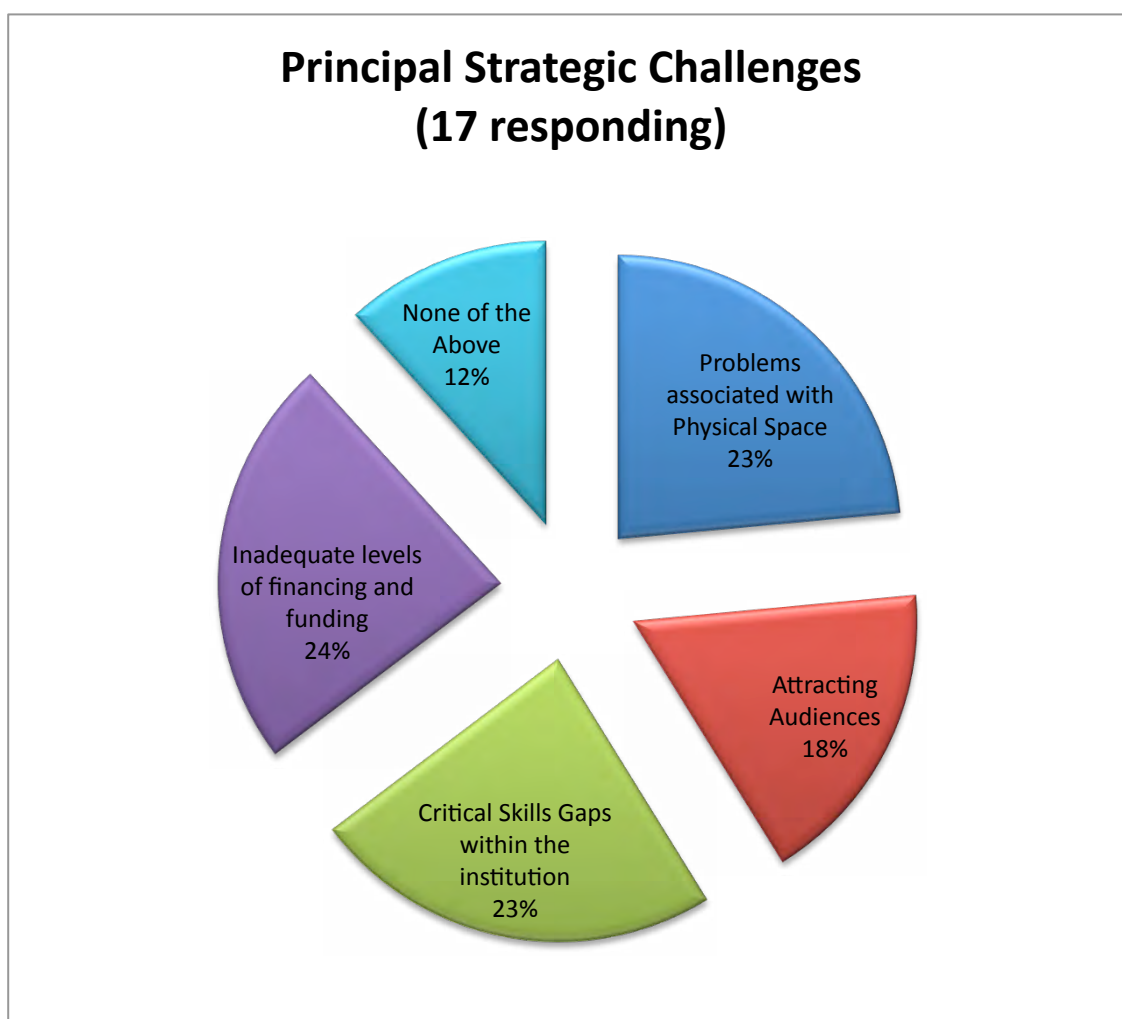
The majority of the respondents (78%) do not charge any entrance fee to members of the public. There was no clear pattern amongst the minority who reported charging an entrance fee: two identified as public institutions, and charged fees of approximately R25.00 for adults, with substantial discounts for young visitors and other concessionary categories. Two identified as private institutions – a university-based collection and a Section 21 – and charged fees of either R35.00 (with substantial concessions) or R5.00 (also with concessions.)

#### **7.5 Publicity**

All respondents reported publicising exhibitions and other events, while most (70%) indicated doing all their publicity internally. Only 30% had used external public relations companies at any time, most often to supplement their own internal efforts.

## 8. Strategic Challenges

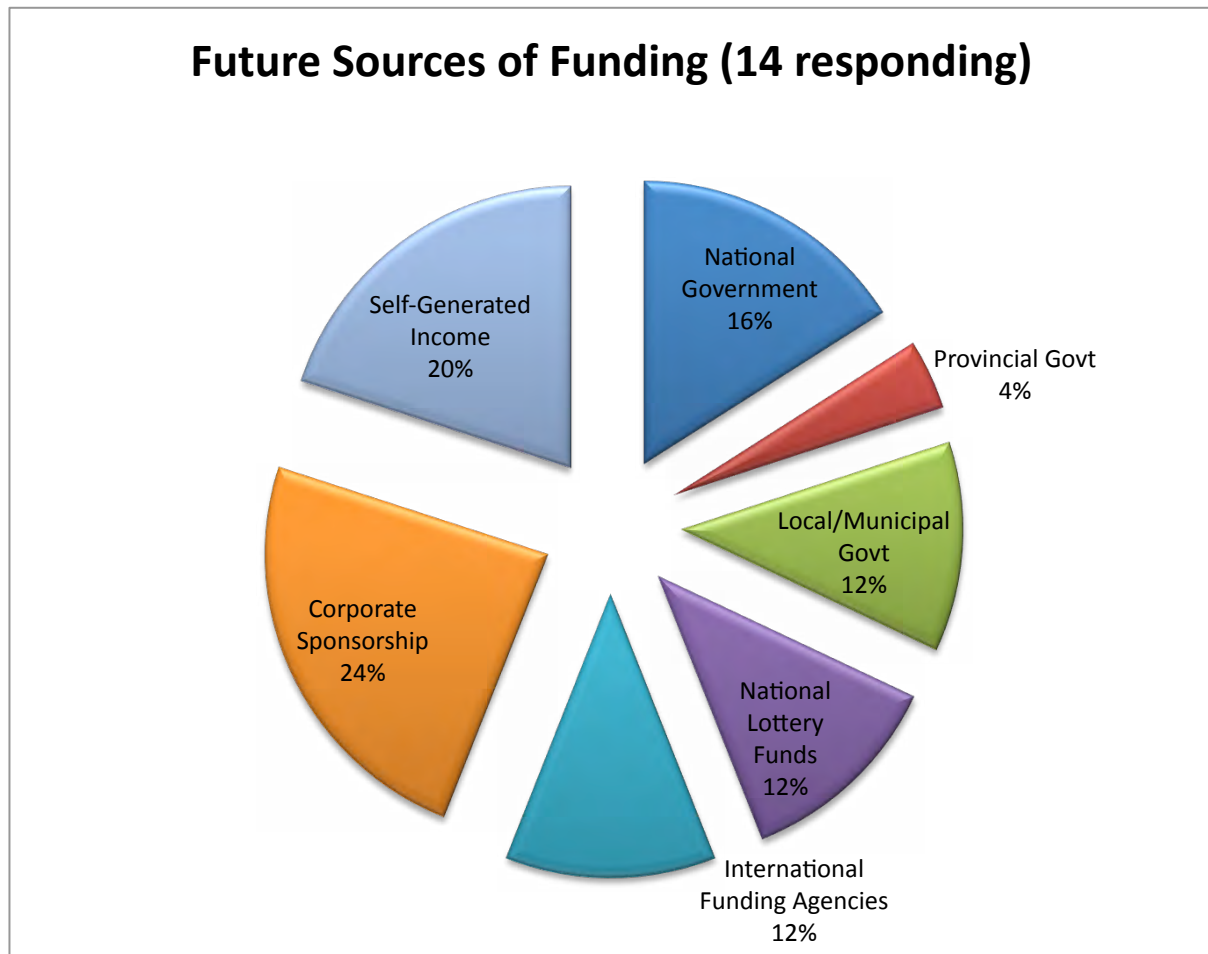
**Note:** Only the long-form survey questionnaires (used in the first stage of interviewing and surveying) included detailed questions regarding strategic challenges. These responses thus exclude those institutions taking part in the second, abbreviated, stage of survey gathering.



There is no clear consensus amongst respondents on what the most pressing strategic challenges to their institutions might be. When these responses are disaggregated between public and private institutions, however, some trends become discernable: almost all of the institutions reporting critical skill gaps were public institutions, as were the majority of those institutions reporting inadequate levels of finance and funding. Most of the respondents highlighting problems associated with their physical spaces were private institutions, with only one public or university-based institution reporting these problems.

It should be noted that this reflects the single most significant perceived challenge to these institutions; as is clear from further questioning, many of these institutions shared secondary concerns – with, for example, the majority of respondents believing that critical skills gaps existed in their organisations, although only 29% indicated this as their principal problem.

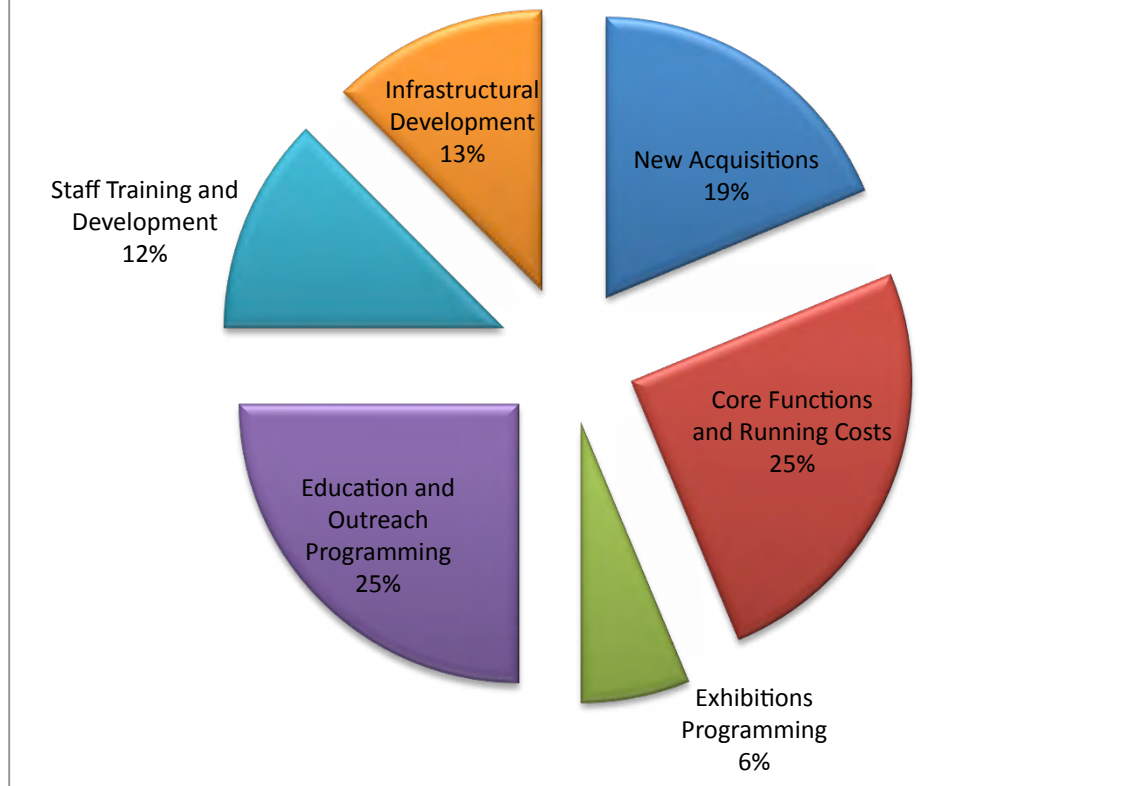
## 8.1 Funding Sources and Future Expenditure



When asked to indicate where the two most likely sources of future funding might lie, a majority of the respondents identified corporate funds or self-generated income. Only a small number of respondents identified national government sources as one of their two potential options; well under ten percent indicated either funding from Provincial Government Sources. This strongly suggests that institutions no longer see public funds as potential sources for increased funding; this may suggest that these institutions see this funding sector as saturated, and no longer capable of expansion.

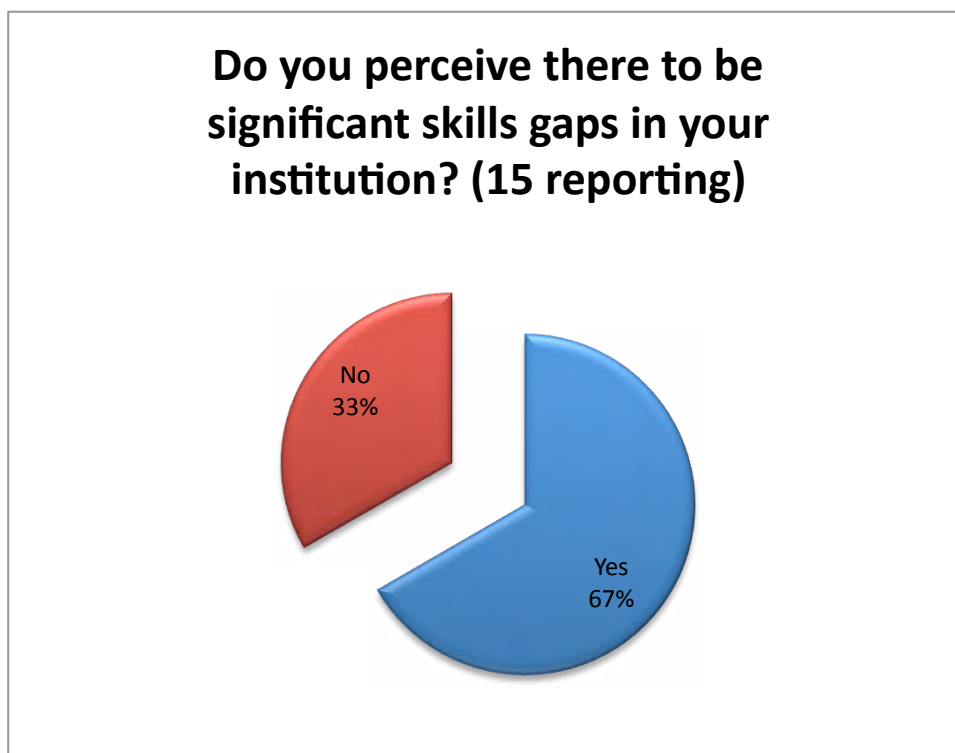
It is worth noting that despite the high numbers of respondents hoping to increase funding through self-generated sources, very few currently generate significant levels of income from this sources. This suggests that although this form of income is highly desired, it may not necessarily be a practical source for significant future expansion without a bureaucratic shift within many of these institutions.

## Future Spending Priorities (16 reporting)



When asked what a potential increase in funding would be spent upon, 25% of respondents indicated that they would like to increase education and outreach programming. (Note that the majority of the surveyed institutions currently spend under 10% of their budgets on such programming; this suggests that is recognised as a significant problem by many of these institutions.) A further 25% - all of which were public institutions – reported needed to spend on core function and running costs. The remaining groups indicated that such hypothetical funding would need to be spend on infrastructural development, acquisitions, and staff training. (It is worth noting here that despite the paucity of acquisition budgets among public institutions, potential funding would have to be spent on more immediate running costs for most of these respondents. This suggests that the expansion and public collections is likely to lag behind corporate collections for the near future.)

## 8.2 Skills Gaps



Two thirds (67%) of responding institutions report the presence of significant skills gaps. This was distributed evenly across both public and private institutions – although, as noted above, all institutions reporting this as the most significant challenge were public museums.

When asked to identify where these particular gaps existed, and which would most urgently need to be redressed, given the resources to do so, the largest proportion of respondents indicated that fundraising and strategic management skills required urgent development.

Specialist museological skills – including restoration and conservation skills, curatorial skills and outreach and education programming skills – were also seen to be needed amongst many institutions. Notably, financial management and leadership skills were not seen to be urgently needed amongst many of the responding institutions.

## 8.3 Physical Conditions

The majority of respondents were relatively satisfied with the physical conditions of their current premises. Just over half of the respondents (54%) indicated that their physical premises were in either excellent or fine condition; another 15% indicated that only minor repairs were necessary. The remaining 31% of the respondents, however, felt that major upgrades were required.

None of the respondents were exceptionally concerned with the physical condition of their permanent collection. Just under half (46%) saw their collection as being in good order, while the remainder (54%) were confident that any minor problems could be addressed within their institutions.

## 8.4 Audiences

The majority of respondents (75%) reported that their audiences were growing – with the vast majority of these reporting a moderate rate of growth. Only one institution responding to this section of the survey indicated that its audience was in decline; the remaining institutions saw their audiences as stagnant.

Despite this general increase in visitor numbers, the majority of the respondents continue to emphasise the importance of attracting more local visitors to their institution; notably, only a third of surveyed museums and collection felt that developing a more diverse audience was of high importance. This suggests either that audiences are seen to have become significantly more diverse in the recent past, or that certain museums are complacent about audience development – as differentiated from audience expansion.

(It is important to note here that no museums keep demographic profiles of their audiences, which makes assessment of audience diversity difficult.)

## RECOMMENDATIONS

### 1. Funding

**1.1 A formal lobby to government to address the issue of tax rebates needs to be organised.**

**1.2 Further research into overseas models of funding could be beneficial in the local context. Structures allied to but separate from macro government and para-statal financial regulations need to be established to allow for more autonomy in fund raising.**

It is evident that, in order to attract corporate and self generated funding, changes would have to be made principally to the legislation which currently does not recognise the museums sector – including corporate collections – as a bona fide educational sector qualifying for tax relief.

Fund-raising in institutions is hampered by top heavy bureaucracy which precludes entrepreneurship of any kind. If one considers institutions such as the Tate Modern in London and the Metropolitan Museum in New York, the revenue gained from the cafes, shops, etc. is a major source of income.

### 2. Acquisitions

**2.1 A pro-active partnership between the Heritage and Arts Sectors should be encouraged.**

The fact that most acquisition budgets are low and that acquisitions are being bolstered by donations should set a note of caution. The consequences of this could include manipulation by artists and dealers in promoting self-interest and the development collections which do not adequately reflect the democratic profile and heritage of the country.

Artworks need to be accorded heritage status so that the developments in each sector can reinforce each other.

### 3. Collections and Physical Infrastructure

**3.1 The training of conservators is currently non existent in South Africa. In order to maintain art collections training centres need to be established.**

The fact that the collections are being maintained in good order is a positive one and one which should encourage the further training of conservators and curators in order to continue with this seemingly positive trend.

### 4. Exhibitions

**4.1 Mutually beneficial partnerships between public, university-based and private institutions should be developed, as should connection between South African museums and collections and museums in other parts of Africa.**

The large number of temporary exhibitions curated and shared between public institutions is positive. A notable gap remains with co-operation with other African institutions which, despite

initiatives such as Nepad, have not taken off. More partnerships between corporate and public institutions could be of value to both in resource sharing.

## **5. Audience Development and Outreach**

**5.1 Research into the seeming lack of effective outreach programmes needs to be undertaken. This should target both non-museum visitors as well as those using various museum services.**

**5.2 Following this, new strategies and policies need to be formulated, at both institutional and national levels.**

The relatively stagnant and under-resourced outreach programmes reported in this survey urgently need development. This is an issue which should be addressed at a government funding and policy level to keep in line with the White Paper on Arts and Culture. (1996). Surveys need to be undertaken with stakeholders and communities as to their needs and perceptions. This may also reveal local pressures and possibilities.

## **6. Management Demographics**

**6.1 A drive to attract graduates in a more demographically appropriate number to the museum profession should be undertaken. Surveys should be conducted on how best to attract this sector.**

Current demographics do not appear to be fully in line with Affirmative Action policies. The majority of museum management is still white. Greater empowerment and ways to bring qualified and dedicated professionals who represent the demographics of the country is needed. From informal discussions and interviews it appears that this is not an attractive career path for a young graduate due to the still negative perception of museums, which in the public eye, still seem to reflect a static institution. Salary levels are also not competitive.

## **7. General**

**7.1 A professional public relations and marketing campaign needs to be established on a countrywide, generic museum level to increase public awareness of the importance of museums.**

**7.2 A Journal of Professional Museum Practice should be established to preserve institutional memory and disseminate best practice.**

The Museum Profession does not market itself and its positive aspects strongly enough. This is an aspect which should be investigated. The SA Museums Association does not feature sufficiently in the sector and this needs to be investigated as its potential lobbying and training roles could be better utilised.

A loss of institutional memory is apparent in the reluctance of many new incumbents to answer the survey due to their inability to access information. This has occurred due to loss of experienced professionals over the past few years. This should be addressed.