
**Information and documentation —
Key indicators for museums**

Information et documentation — Indicateurs clés des musées

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

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For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 46, *Information and documentation*, Subcommittee SC 8, *Quality — Statistics and performance evaluation*.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

This document provides guidance to the museum community on the use of key museum indicators. It specifies the requirements of a key indicator for museums and establishes a set of indicators to be used by museums of all types.

Some of the indicators included in this document are already in use by museums, or have been proposed in recent museum literature. Other indicators have been taken from library standards and adapted to the requirements of museums. [Annex A](#) describes the key indicators that have been found useful for quality assessment of museums. The data specified in [Annex B](#) can be used for complementing and supporting the information gained by using the key museum indicators, though they are not in themselves such indicators. This document has been developed in close cooperation with the International Council on Museums (ICOM) and takes advantage of, particularly, the work of the European Group on Museum Statistics (EGMUS).

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Information and documentation — Key indicators for museums

1 Scope

This document specifies a set of key indicators for assessing the quality of museums:

- for the purpose of strategic planning and internal management of museums;
- for reporting to stakeholders such as funding institutions, policy makers, or the public;
- to promote the museums' role and value for learning and research, education and culture, social and economic life;
- for comparing results over time and between museums.

The aim of this document is to provide a selection of key indicators applicable to a wide range of museums. It is recognized that not all indicators are pertinent for each individual museum category or each individual museum. Limitations on the applicability of individual indicators are listed in the scope clause of the description of each indicator (see [Annex A](#)).

This document is not intended to exclude the use of other indicators not specified in it.

2 Normative references

There are no normative references in this document.

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <http://www.electropedia.org/>

3.1 accessibility

ease of reaching and using a service or facility

[SOURCE: ISO 11620:2014, 3.2]

3.2 accession

addition

formal act of entering an object into the collections of a museum

Note 1 to entry: Once an object has been accessioned, it has a status beyond that of merely being the property of the organization and can only be disposed of by referring to the governing body of the organization, e.g. the trustees or director.

[SOURCE: ISO 18461:2016, 2.5.1]

3.3

accession register

itemized list or record of the objects properly added to a museum collection during a specified period of time

[SOURCE: ISO 18461:2016, 2.8.1]

3.4

acquisition

process of gaining legal possession of an object for a museum collection through purchase, *donation* (3.16), bequest, transfer or fieldwork

[SOURCE: ISO 18461:2016, 2.5.2]

3.5

capital expenditure

expenditure which results in the *acquisition* (3.4) of, or addition to, fixed assets

Note 1 to entry: This includes expenditure on building sites, new buildings and extensions, furnishings and equipment for new and expanded buildings, computer systems (hardware and software), etc. When applicable, local and national sales/purchase taxes [e.g. Value Added Tax (VAT)] are included.

[SOURCE: ISO 2789:2013, 2.6.1]

3.6

catalogue

collection of records filing/storing relevant information about an object in a museum collection

[SOURCE: ISO 18461:2016, 2.8.2, modified — The phrase “all known” has been excluded.]

3.7

cataloguing

process of recording and filing/storing relevant information about an object in a museum collection

Note 1 to entry: Such information can include origin, age, creator, title (e.g. for works of art), physical description (materials and/or techniques used in its making, physical dimensions), use, provenance, etc. of the object.

[SOURCE: ISO 18461:2016, 2.8.3, modified — The phrase “all known” has been excluded]

3.8

collection

body of acquired objects held in title by a museum

[SOURCE: ISO 18461:2016, 2.5.9]

3.9

collection management

all practices and procedures implemented by a museum in acquiring, documenting, handling, accessing, *cataloguing* (3.7), storing, securing, lending, conserving and disposing of collection objects

[SOURCE: ISO 18461:2016, 2.5.10]

3.10

collection policy

museum's scope and its aims, practices and procedures of *collection management* (3.9)

Note 1 to entry: The collection policy also identifies the kinds of objects a museum will collect, the terms and conditions governing acquisitions and the deaccession policy.

[SOURCE: ISO 18461:2016, 2.5.11]

3.11**conservation**

preservation measures and actions applied to prevent, arrest or delay deterioration of a *document* (3.15) or other material object

[SOURCE: ISO 5127:2017, 3.12.1.01]

3.12**digital collection**

all objects in digital form in the museum collection, whether born digital or digitized

Note 1 to entry: *Documents* (3.15) are included.

[SOURCE: ISO 18461:2016, 2.5.13]

3.13**digitization**

process of converting analogue materials into digital form

[SOURCE: ISO 2789:2013, 2.3.15]

3.14**digitized object**

digitally reproduced object

Note 1 to entry: A two-dimensional or three-dimensional object is counted as digitized if its metadata and at least one image of it are available in digital format.

Note 2 to entry: Documents such as autographs, books or audiovisual documents are counted as digitized if their metadata and their contents are available in digital format.

Note 3 to entry: *Documents* (3.15) are included.

[SOURCE: ISO 18461:2016, 2.5.15]

3.15**document**

recorded information or material object which can be treated as a unit in a documentation process

Note 1 to entry: Documents can differ in form and characteristics.

[SOURCE: ISO 5127:2017, 3.1.1.38, modified — Note 1 to entry of ISO 2789:2013, 2.3.17 has been included.]

3.16**donation**

gift

acquisition (3.4) without monetary compensation but with change of ownership and legal title

[SOURCE: ISO 5127:2017, 3.6.2.2.11]

3.17**educational services**

learning sessions and learning materials and programmes in all formats for children and adults for the purpose of enhancing skills and knowledge

Note 1 to entry: This includes the provision of services for schools and the cooperation with other partners in preparing and offering educational services.

[SOURCE: ISO 21248:2019, 3.22, modified — The phrase “in library and information use” has been excluded and the terms “and knowledge” added. Note 2 to entry has been omitted.]

3.18
effectiveness

measure of the degree to which given objectives are achieved

Note 1 to entry: An activity is effective if it maximizes the results it was established to produce.

[SOURCE: ISO 11620:2014, 3.15]

3.19
efficiency

measure of the utilisation of resources to realize a given *objective* (3.35)

Note 1 to entry: An activity is efficient if it minimizes the use of resources, or produces better performance with the same resources.

[SOURCE: ISO 11620:2014, 3.16]

3.20
evaluation

process of determining the *effectiveness* (3.18), *efficiency* (3.19), utility and relevance of a service or facility

[SOURCE: ISO 11620:2014, 3.19]

3.21
event

pre-arranged singular activity having an intent within the *mission* (3.28) of the museum

Note 1 to entry: The activity would usually be of a cultural, educational, social, political or scholarly nature, and would take the form of lectures, film screening, theatre performances, round table discussions, vernissage, finnisage, museum night, etc.

Note 2 to entry: Events can be organized inside or outside the museum premises.

Note 3 to entry: Events inside the museum premises organized by institutions outside the museum without the museum's participation should be counted separately.

Note 4 to entry: Guided tours, programmes, exhibitions and virtual events are excluded.

[SOURCE: ISO 18461:2016, 2.4.5]

3.22
exhibition

curated display of museum objects or other items of cultural heritage on a clear concept and communicating a message

Note 1 to entry: Exhibitions can take place inside or outside the museum premises.

Note 2 to entry: Exhibitions can be temporary or permanent.

Note 3 to entry: Virtual exhibitions are excluded.

Note 4 to entry: Exhibitions inside the museum premises organized by institutions outside the museum without the museum's participation should be counted separately.

[SOURCE: ISO 18461:2016, 2.4.6]

3.23**full-time equivalent****FTE**

measurement equal to one staff person working a full-time work schedule for one year

Note 1 to entry: For example, if out of three persons employed as museum employees, one works quarter-time, one works half-time, and one works full-time, then the FTE of these three persons would be $0,25 + 0,5 + 1,0 = 1,75$ employees (FTE).

[SOURCE: ISO 11620:2014, 3.23]

3.24**goal**

desired state of affairs to be achieved by the implementation of agreed policies

[SOURCE: ISO 11620:2014, 3.24]

3.25**income generated**

income generated by museum operations and from fees, charges, subscriptions and *donations* (3.16)

[SOURCE: ISO 2789:2013, 6.6.3, modified — the term “library” has been replaced by “museum”. The phrase “that is available to the library for expenditure” has been excluded.]

3.26**inventory**

itemized list or record of all objects contained in a museum collection during a specified period of time

[SOURCE: ISO 18461:2016, 2.8.7]

3.27**loan**

lending of an object in the museum's collection to, or borrowing an object from, other collecting organisations, private collectors, or agencies

Note 1 to entry: Deposits (permanent loans) are counted separately.

[SOURCE: ISO 18461:2016, 2.4.7]

3.28**mission**

statement approved by the authorities formulating the organization's *goals* (3.24) and its choices in services and products development

[SOURCE: ISO 11620:2014, 3.33]

3.29**museum**

non-profit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates and exhibits the tangible and intangible heritage of humanity and its environment for the purposes of education, study and enjoyment

Note 1 to entry: Natural, archaeological and ethnographic monuments and sites and historical monuments and sites of a museum nature are included, if they maintain a collection similar to museums.

Note 2 to entry: Zoos, aquaria, arboreta and botanical gardens are included, but should be reported separately.

Note 3 to entry: Collections in institutions of higher education that serve only the purposes of teaching and study are excluded.

Note 4 to entry: Conservation institutes and exhibition galleries in libraries and archives centres are included if they conform to the definition of museum.

Note 5 to entry: To conform to the definition it is not necessary that an institution be called a museum, but that it has the role and function of a museum.

[SOURCE: ICOM, Museum definition, 2007]

3.30

museum employee

person who works for a museum in return for payment

[SOURCE: ISO 2789:2013, 2.7.1, modified — The term “library” has been replaced by “museum”.]

3.31

museum key indicator

numerical, symbolic or verbal expression assessing the activity of a museum in view of its *mission* (3.28)

Note 1 to entry: The indicators can be derived from museum statistics and from other data used to characterize the museum activities.

3.32

museum staff research publication

research publication by museum staff on professional and academic subjects

Note 1 to entry: Includes publications in all formats, and presentations at conferences.

[SOURCE: ISO 2789:2013, 2.5.4, modified — The term “library” has been replaced by “museum”.]

3.33

museum website

unique domain on the Internet consisting of a collection of web pages that is published by a museum to provide access to the museum’s services and resources

[SOURCE: ISO 2789:2013, 2.2.18, modified — The term “library” has been replaced by “museum”. Notes to entry 1 to 3 have been omitted.]

3.34

object

item which forms part of a museum’s collection

Note 1 to entry: For objects in natural science collections the term “specimen” is generally used.

Note 2 to entry: *Documents* (3.15) are included.

[SOURCE: ISO 18461:2016, 2.5.24]

3.35

objective

specific target for an activity to be attained as a contribution to achieving the *goal* (3.24) of an organization

[SOURCE: ISO 11620:2014, 3.34]

3.36

online access

successful request of a museum-provided online service

Note 1 to entry: An online access is one cycle of user activities that typically starts when a user connects to a museum-provided online service and ends by a terminating activity that is either explicit (by leaving the service through log-out or exit) or implicit (timeout due to user inactivity).

Note 2 to entry: Online accesses to the museum website are counted as virtual visits.

Note 3 to entry: If possible, requests by robots/web crawlers should be excluded.

[SOURCE: ISO 2789:2013, 2.2.1, modified — The term “access” has been changed to “online access”. The term “library” has been replaced by “museum”. Note 3 to entry has been omitted.]

3.37

online catalogue

database of records and images describing objects of one or more museums presented for public access

[SOURCE: ISO 18461:2016, 2.4.11]

3.38

open access

unrestricted access to information, *documents* (3.15) or information services

Note 1 to entry: This does not necessarily imply that the access is free of charge.

[SOURCE: ISO 5127:2017, 3.11.1.05, modified — Note 1 to entry has been added.]

3.39

opening hours

hours in a normal week when the museum is accessible to visitors

[SOURCE: ISO 18461:2016, 2.6.4]

3.40

permanent exhibition

long-term exhibition

exhibition showing, over a long period of time, objects which are in long-term custody of the museum

[SOURCE: ISO 18461:2016, 2.4.13]

3.41

physical visit

act of entering the museum premises with the aim of experiencing its exhibitions, programmes or other services directed towards the public

[SOURCE: ISO 18461:2016, 2.4.14, modified — The terms “into one or all of the parts of” have been deleted, and the phrase “with the aim of experiencing its exhibitions, programmes or other services directed towards the public” has been added.]

3.42

preservation

all measures taken, including financial and strategic decisions, to maintain the integrity and extend the life of *documents* (3.15) or collections

[SOURCE: ISO 5127:2017, 3.2.1.39, modified — Notes 1 and 2 to entry have been omitted.]

3.43

process

set of interrelated or interacting activities which transform inputs into outputs (e.g. preparing an exhibition, cataloguing, lending, reference service)

[SOURCE: ISO 16439:2014, 3.50]

3.44

professional staff member

museum employee (3.30) who has graduated at university level or in a special training course in the museum sector and whose duty requires professional education or experience

3.45

programme

pre-arranged on-going and repeatable activity having an intent within the mission of the museum

Note 1 to entry: The activity would usually be of a cultural, educational, social political or scholarly nature, and would take the form of workshops, travel programmes, courses for school classes, etc.

Note 2 to entry: Programmes can be organized inside or outside the museum premises.

Note 3 to entry: Programmes inside the museum premises organized by institutions outside the museum without the museum's participation should be counted separately.

Note 4 to entry: Events, guided tours, exhibitions and virtual events are excluded, but are counted separately.

Note 5 to entry: Virtual programmes are included, but should be counted separately.

[SOURCE: ISO 18461:2016, 2.4.15]

3.46

project

unique process, consisting of a set of coordinated and controlled activities with start and finish dates, undertaken to achieve an objective conforming to specific requirements, including the constraints of time, cost and resources

Note 1 to entry: An individual project can form part of a larger project structure.

Note 2 to entry: Adapted from ISO 9000:2015.

[SOURCE: ISO 18461:2016, 2.8.10]

3.47

record

set of data on one person, object or *event* (3.21), selected and presented for a predefined purpose

Note 1 to entry: The record can include elements such as title, creator, subject, description, date of origin, etc.

[SOURCE: ISO 18461:2016, 2.8.11]

3.48

reliability

degree to which a measure repeatedly and consistently produces the same result

[SOURCE: ISO 11620:2014, 3.44]

3.49

restoration

actions taken to return a *document* (3.15) or other material object which has suffered deterioration or damage as closely as practicable to its original state

Note 1 to entry: In archival restoration, no attempt is made to recreate missing text, etc., and all restoration work is kept clearly evident.

[SOURCE: ISO 5127:2017, 3.12.1.02, modified — The term “preservation” has been excluded in the definition, and Note 2 to entry has been omitted.]

3.50

satisfaction survey

survey administered to a sample of a museum's users to find out how they rate the quality of their museum experiences, and any suggestions for improvement

Note 1 to entry: The survey may be conducted face to face, via handouts, telephone, email, or Internet.

Note 2 to entry: The survey can contain questions about user status, how often and how they normally use the resources and services the museum provides.

Note 3 to entry: In a longitudinal study, the same or a similar survey instrument is administered more than once, after a suitable interval of time has elapsed, to measure changes in patterns of usage, perceptions, attitudes, etc.

[SOURCE: ISO 16439:2014, 3.72, modified — The term “library” has been replaced by “museum”.]

3.51

score

result, often expressed numerically, of a museum indicator

3.52

special grant

grant of a non-recurrent nature to fully or partially fund projects

[SOURCE: ISO 2789:2013, 2.6.4, modified — The definition has been slightly modified.]

3.53

staff training

formal pre-planned training which can be held in-house or externally, and delivered by museum staff or external experts

Note 1 to entry: Informal training, e.g. point-of-use training, is excluded.

Note 2 to entry: Online training is included.

[SOURCE: ISO 2789:2013, 2.7.6, modified — The term “library” has been replaced by “museum”, and Note 2 to entry has been added.]

3.54

storage area

area of the museum where the objects are kept under controlled conditions if not on display or in technical treatment

[SOURCE: ISO 18461:2016, 2.6.5]

3.55

target group

group of actual and potential visitors appropriate to a museum as the object of a specific service or as the primary users of specific materials

Note 1 to entry: Such target groups can, for example, be children, school classes, researchers, or educators.

[SOURCE: ISO 11620:2014, 3.49, modified — “target population” has been changed to “target group”, the term “library” has been replaced by “museum”, and Note 1 to entry has been added for clarification.]

3.56

temporary exhibition

short-term exhibition
exhibition shown during a limited period of time

Note 1 to entry: A temporary exhibition is counted only once, in the year it is started.

[SOURCE: ISO 18461:2016, 2.4.19]

3.57

travelling exhibition

exhibition that is shown consecutively in several locations

[SOURCE: ISO 18461:2016, 2.4.19]

3.58

user

recipient of museum services

Note 1 to entry: The recipient can be a person or an institution, including museums.

Note 2 to entry: Museum services include electronic services, physical services and visiting the museum premises.

[SOURCE: ISO 2789:2013, 2.2.36, modified — The term “library” has been replaced by “museum”.]

3.59

validity

extent to which the results of a research process represent what was intended

[SOURCE: ISO 20252:2006, 2.62]

3.60

value

importance that stakeholders (funding institutions, politicians, the public, users, staff) attach to museums and which is related to the perception of actual or potential benefit

Note 1 to entry: Monetary value can be included.

[SOURCE: ISO 16439:2014, 3.75, modified — The term “library” has been replaced by “museum.”]

3.61

virtual event

event in electronic format, specially designed for use via the Internet

[SOURCE: ISO 2789:2013, 2.2.38]

3.62

virtual exhibition

exhibition in electronic format, specially designed for use via the Internet

[SOURCE: ISO 18461:2016, 2.4.19]

3.63

virtual visit

one continuous cycle of user activities on the *museum website* ([3.33](#)), regardless of the number of pages or elements viewed

Note 1 to entry: A virtual visit typically starts when a user accesses the museum website after visiting an external page, and ends if no activity has been recorded for a defined period of time (a maximum of 30 min). Another access after a longer interval initiates a new visit.

Note 2 to entry: A virtual visitor should at least be identified by a unique cookie and/or by a unique combination of the user's IP address and browser string (user agent). Known web spiders and harvesters should be excluded.

[SOURCE: ISO 2789:2013, 2.2.39, modified — The term “library” has been replaced by “museum”, and the phrase “by users from outside the library's IP address space (usually from outside the library premises)” has been omitted.]

3.64

visitor

person (individual) entering the museum premises with the aim of experiencing its exhibitions, programmes, or other services directed towards the public

3.65**visitor with special needs**

person that requires special services and/or facilities for a museum visit

Note 1 to entry: The special needs can be caused by physical and health impairment, cultural difference (e.g. non-native speakers, new arrivals), educational background, or other circumstances that require special museum services and/or facilities.

Note 2 to entry: Children, young people and seniors without additional needs are not included.

[SOURCE: ISO 2789:2013, 2.2.35, modified — “target population with special needs” has been replaced by “visitor with special needs”, the text has been adapted to museum visitors. Note 3 and 4 to entry have been omitted.]

3.66**volunteer**

person working on museum tasks without payment

Note 1 to entry: Volunteers can receive token reimbursements or expense allowances.

[SOURCE: ISO 2789:2013, 2.7.7, modified — the term “library” has been replaced by “museum”.]

4 Functions and quality aspects of museums**4.1 Core functions of museums****4.1.1 Collecting**

The main tasks are:

- to regularly acquire objects, along and within the collection policy of the museum;
- to formulate a written collection policy according to the museum’s mission and to constantly pursue and update it;
- to catalogue/describe the collected objects in the inventory documents and in scientific catalogues and databases;
- to make the collections visible and accessible by online catalogues and via the Internet.

4.1.2 Preserving

The main tasks are:

- to preserve the museum’s analogue and digital collections through safe storage, stable environment, preventive conservation and restoration treatment;
- to develop and promote disaster management plans.

4.1.3 Exhibiting (Presenting)

The main tasks are:

- to present the collections to the general public via permanent and temporary exhibitions;
- to make the collections accessible in digital formats and in online environments;
- to offer regular and adequate opening times;
- to offer suitable services for persons with special needs.

4.1.4 Educational activities

The main tasks are:

- to support learning and education by offering educational programmes related to the museum's mission, collections and themes;
- to consider the needs of specific groups (adults, children, students, refugees, etc.) in programmes and events;
- to provide services for schools.

4.1.5 Research

The main tasks are:

- to promote the collections by research and publications;
- to provide access for researchers;
- to initiate and support research projects on collection objects;
- to organize conferences and seminars based on the research.

4.1.6 Management

The main tasks are:

- to ensure effectiveness and cost-efficiency (using adequate technology and management methods);
- to arrange for clearly defined procedures;
- to provide for staff development;
- to cooperate locally, regionally, nationally and internationally with museums and other organizations.

4.2 Quality aspects of museums

A number of key factors are essential for achieving successful museum work. The most relevant of these are:

- a) a clear concept and general attractiveness of the permanent and temporary exhibitions;
- b) adaptation of the permanent exhibition to current research and educational concepts;
- c) a general research plan including research activities and publications by staff;
- d) differentiated individual descriptions of each object;
- e) uniqueness and/or context of collection objects (reasons why a specific object is kept in the collection).

In addition, more general quality characteristics are named in the literature on museums. Examples are:

- competence of staff: Staff should be well trained in all museum activities;
- accuracy and reliability of the services, e.g. unbiased and scientifically sound presentation and description of objects, up-to-date catalogues, correct answers to researchers' questions;
- accessibility: The museum building, the exhibitions, the digitized collections and other services should be easily accessible. Examples are adequate opening times, efficient sign-posting, usability of databases and the website, simple-to-use online services, intellectual and physical accessibility;

- aesthetics: visual attractiveness (building, display of collection);
- visitor-orientation: Services should be oriented to the visitors and, along with that, to the specific target groups that the museum aims to serve, e.g. families, the local community, citizens with special interests, researchers, tourists or children;
- effectiveness and efficiency: All processes in the museum should be well organized and streamlined, so that quality can be offered with minimum resources;
- helpfulness of staff: Staff working with the public should be friendly and responsive, and should possess communication skills.

5 Key indicators for museums

5.1 General

For the following chapter, especially for the general description of museum key indicators and their use, this document relies partly on ISO 11620.

Museum key indicators can give information to which extent the goals of a museum have been reached. They can be used to assess the quality and effectiveness and/or efficiency of the functioning and the services of a museum. They can and should also indicate problems and shortcomings in the performance of the museum so that action can be taken to remedy these. It is vital that the indicators in this document allow a rational, unbiased and not locally restricted assessment of museums and their contribution to society.

Indicators combine data collected for the annual museum statistics and data that may be collected additionally for a specific indicator. Each indicator shall be capable of showing whether a higher or a lower score indicates higher quality.

All key indicators included in [Annex A](#) fulfil the criteria presented in [5.2](#) and are specified according to the descriptive framework presented in [5.6](#). The indicators shall be calculated and used as specified in [Annex A](#).

5.2 Criteria for museum indicators

Museum indicators shall be:

- a) informative for measuring an activity, for identifying achievements, and for identifying problems and shortcomings in the performance of the museum;
- b) reliable, i.e. constantly produce the same result when used repeatedly under the same circumstances;

NOTE Variations do not make an indicator unreliable.

- c) valid, i.e. shall measure what they are intended to measure;

NOTE Estimations are possible.

- d) *appropriate* for their purpose, applicable to the institution and situation (museum environment) for which they are meant and expressing exactly those, and only those, features that are intended to be measured;
- e) practical, i.e. using a reasonable amount of resources (money, time, qualified staff, involvement of museum visitors, etc.).

If the museum indicator is intended for comparisons between museums, a further criterion applies:

- 1) The museum indicators shall be comparable: An indicator allows comparison if the same score, making allowance for the accuracy of the score, means the same level of quality or efficiency in the museums to be compared.

5.3 Use of museum indicators

Museum indicators can be used as tools:

- to assess the quality and effectiveness of activities, resources, and services provided by a museum;
- and to assess the efficiency of resources allocated by the museum to such activities and services.

The indicators can and should also indicate problems and shortcomings in the performance of the museum.

As an evaluation tool, museum indicators have three principal objectives:

- a) to make the management process more effective;
- b) to serve as a basis for reference and for dialogues between museum staff, funding bodies, and the user community;
- c) to serve in comparative analysis of museums which have similar missions or objectives.

Users of museum indicators should recognize that it is impossible to achieve optimum scores simultaneously on all indicators. For example, a museum may achieve a high level of popularity in the population by spectacular exhibitions, but the staff resources spent on the exhibitions may be lacking in other areas, so that cataloguing or digitisation cannot achieve high scores.

Scores on museum indicators shall be interpreted in the light of what the museum intends to accomplish, and not simply in terms of optimizing scores on particular indicators.

5.4 Selection of museum indicators.

This document recognizes that there are many different types of museums, e.g. in different settings, serving different visitor populations. Since there is such a wide variation around the world, it is important to understand that not all museum indicators are useful for all museums.

Museums, in consultation with the relevant parties, shall decide which indicators are most appropriate in the given situation. The decision shall be made in the light of the mission, goals and objectives of the museum. All parties concerned should be in agreement on the appropriateness of the museum indicators used.

Several of the indicators will need appropriate staff skills on all levels to be implemented and processed.

5.5 Comparability of results

A primary purpose of using museum indicators is self-diagnosis. This may include longitudinal studies that compare one year's performance with another, within the same museum.

A secondary purpose is to encourage meaningful and useful comparisons across different museums. Standardizing museum indicators and the procedures for collecting the data assists in that process. However, such comparisons shall always be made respecting each museum's:

- mission and core tasks;
- resources;
- different audiences;

- governance model;
- in-house procedures.

If comparisons of indicator scores across different museums are made, they should be done with considerable care and in full recognition of the limitations of such comparisons.

5.6 Descriptive framework

5.6.1 General

Each indicator is presented in the standard format described in this clause.

5.6.2 Name

Each museum key indicator shall have a unique, descriptive name.

5.6.3 Background

The background statement describes the actual state and importance of the service, activity or aspect the indicator is meant to measure.

The statement shows what is regarded as quality in the service, activity or aspect in museums and what measures/indicators have as yet been used for assessing that quality.

5.6.4 Objective of the indicator

The objective indicates what the indicator is meant to measure in relation to the museum's goals.

5.6.5 Scope

The scope shall state the types of museums to which the indicator can be applied.

The scope may state whether the indicator is suitable for comparison between museums and whether there are any limitations concerning comparability.

The scope may include other limitations in the application of the indicator.

5.6.6 Definition of the indicator

The definition describes the data that are necessary for the indicator and their relation.

Unambiguous terms used in the customary sense need not be defined.

5.6.7 Method

This section describes the way in which the data are collected and results are calculated.

If more than one method has been shown to be effective for the same purpose, several methods are described.

The descriptions supplied shall not include general statistical methodology such as sampling procedures, sampling sizes, estimates of confidence intervals, statistical tests, etc.

If a measure needs to be repeated to determine the value of the indicator, this shall be stated clearly.

If possible, the descriptions of methods shall indicate the effort necessary for preparation, data collection and analysis of results.

5.6.8 Interpretation and use of results

This section discusses how the results might be interpreted, especially reasons for low effectiveness. It points to difficulties and to circumstances that could affect the results.

The statement names possible reactions to the results in order to achieve better results and explains what other key indicators might be useful in the same context.

The interpretation statement may include information about the variations to be expected, such as seasonal variations or variations in time of day.

5.6.9 Source(s)

References are supplied to document the source of the indicator. The description should state clearly whether the indicator as described in this document is a modified version of the indicator described in the source document.

If the name of the indicator is different from the one used in the source, the original name is supplied in parentheses after the reference.

The references may include documents supplying more detailed information about the use of the indicator, methods of data collection and analysis, etc.

6 List of key indicators for museums

6.1 General

The indicators in [Table 1](#) are grouped by the functions and activities to which they relate, and reference is given to the descriptions provided in [Annex A](#).

The indicators shown in [Table 1](#) were adapted from the following sources:

- literature and projects of performance measurement in museums, see References [\[10\]](#), [\[12\]](#), [\[15\]](#), [\[18\]](#) and [\[20\]](#);
- museum assessment programmes of different countries and regions, often in the form of self-assessment, see References [\[9\]](#), [\[11\]](#) and [\[16\]](#);
- the library standard ISO 11620^[3].

6.2 Museum functions and key indicators

6.2.1 Collections

- Key indicators: The indicators assess how far the objects in the collection have been catalogued, and whether the records are searchable on the Internet. The number of loans to other museums (generally for exhibitions) can show the renown and uniqueness of the collection. The indicators also evaluate the museum's engagement in preservation: adequate storage, the preservation condition of objects, and the treatment of damaged or endangered objects.
- Additional information: It may also be interesting to know whether the museum has a written collection policy, and the frequency of controlling the storing conditions and the preservation condition.

6.2.2 Exhibitions

- Key indicators: The indicators measure the uniqueness of exhibited objects and the renown and up-to-dateness of the permanent and temporary exhibitions.

- Additional information: The number of exhibitions and of visitors to exhibitions can give valuable information.

6.2.3 Digitization

- Key indicators: Digitization as the new form of giving access to the collections is evaluated as to comprehensiveness and usefulness.
- Additional information: The size of the digitized collection and the number of annual additions should be counted.

6.2.4 Visits/Visitors/General awareness

- Key indicators: The indicators grouped under “visits/visitors” relate to how visitors and the general population value a specific museum or to the satisfaction grades of visitors. The indicators also measure repeat visitors and the increase in first-time visitors.
- Additional information: Assessing the reasons for museum use and museum visits may give additional information.

6.2.5 Educational activities and events

- Key indicators: The indicators assess the museum’s engagement in educational services by the input of staff resources and the attractiveness of educational programmes by the satisfaction of the attendants.
- Additional information: Attendants might be subdivided as to specific groups (such as adults, children, students, tourists, immigrants).

6.2.6 Research

- Key indicators: The indicator assesses the value of staff research by the number of research publications.
- Additional information: The number of conferences and seminars organized by the museum and the number of staff members with PhDs might give valuable information.

6.2.7 Management

- *Key indicators:* The indicators assess the museum’s ability to cope with funding issues by a high percentage of self-generated income. The museum’s fitness for future is assessed by its engagement in staff training and cooperation and by its attraction for volunteers.

6.3 List of key indicators for museums

[Table 1](#) contains 30 key indicators, however, with the changing and widening museum activities, new indicators will be developed.

Table 1 — List of key indicators for museums

Core function	Indicator	Source(s)
A.1 Collections		
A.1.1	Percentage of all objects catalogued	Anderson ^[10] ; Leikam et al. ^[14]
A.1.2	Percentage of all objects for which searchable records are available on the Internet	ISO 11620 ^[3]
A.1.3	Number of loans per professional staff member	
A.1.4	Percentage of storage space which has an appropriate environment	ISO 11620 ^[3]
A.1.5	Percentage of the collection in satisfactory preservation	Spectrum ^[19] ; ISO 11620 ^[3]
A.1.6	Percentage of objects needing conservation/restoration treatment that received such treatment	ISO 11620 ^[3] ; Anderson ^[10]
A.2 Exhibitions		
A.2.1	Percentage of exhibitions presenting 30 or more objects of which more than 33 % have not been shown together before	Anderson ^[10]
A.2.2	Percentage of travelling exhibitions	Anderson ^[10]
A.2.3	Changes in the permanent exhibition per year	Evaluierung der Österreichischen Bundesmuseen ^[11]
A.3 Digitization		
A.3.1	Percentage of all objects digitized	ISO 18461 ^[6]
A.3.2	Percentage of all objects for which either one or more digital image(s) or sound or video recording(s) are available on the Internet	ISO 18461 ^[6]
A.3.3	Number of online accesses per digitized object	ISO 11620 ^[3]
A.4 Awareness and satisfaction		
A.4.1	Percentage of survey respondents that know the museum	Evaluierung der Österreichischen Bundesmuseen ^[11]
A.4.2	Percentage of survey respondents who feel it is important that the community has their own museum	LISU ^[15]
A.4.3	Percentage of survey respondents who visited the museum in the last year	
A.4.4	Visitor satisfaction	ISO 11620 ^[4]
A.4.5	Willingness to return	ISO 11620 ^[4]
A.4.6	Percentage of visitors who would recommend a visit	DCMS ^[12]
A.4.7	Satisfaction of visitors with special needs with the access options	
A.4.8	Percentage of repeat visits	LISU ^[15]
A.4.9	Percentage of increase in first-time visits	Several sources
A.4.10	Percentage of increase in visits	Several sources

Table 1 (continued)

Core function	Indicator	Source(s)
A.5 Education and events		
A.5.1	Satisfaction of attendants with educational events	
A.5.2	Percentage of staff in educational services	
A.5.3	Percentage of schools in the relevant surroundings reached	
A.5.4	Percentage of increase in schoolchildren's visits	
A.6 Research		
A.6.1	Number of research publications per professional staff member	ISO 18461 ^[6]
A.7 Management		
A.7.1	Percentage of total income that is self-generated	Victoria and Albert Museum ^[20]
A.7.2	Percentage of the total income additionally gained for projects	
A.7.3	Number of attendance hours at formal training lessons per staff member	ISO 11620 ^[3]
A.7.4	Percentage of staff time spent on cooperative partnerships and projects	ISO 11620 ^[3]
A.7.5	Percentage of the total museum staff that are volunteers	Anderson ^[10]

Annex A **(normative)**

Description and calculation of indicators

A.1 Collections

A.1.1 Percentage of all objects catalogued

A.1.1.1 Background

Objects in museum collections are generally unique; this requires an individual description for each object. Though some data of a catalogue record may be similar to those in other records (such as provenance or date of origin), there will usually be other data that demand considerable research effort. As a result, there are often parts of the collection that have not yet been adequately catalogued.

Therefore, the percentage of all objects in the museum's collection catalogued can be seen as a quality aspect of collection building.

A.1.1.2 Objective of the indicator

To assess whether the objects in the museum's collection have been catalogued.

A.1.1.3 Scope

The indicator is applicable to all museums.

Comparison between museums can be affected by the variety and complexity of the objects that have to be catalogued.

The indicator does not measure the comprehensiveness of the cataloguing data.

A.1.1.4 Definition of the indicator

Percentage of all objects in the museum's collection that have been catalogued, whether in analogue or digital format, at the end of the reporting period.

"Cataloguing" includes both the basic description in the inventory documents and the complete record in scientific catalogues. To avoid misunderstandings, the user of the indicator should state explicitly what type of cataloguing is included in the calculation.

A.1.1.5 Method

A.1.1.5.1 To establish the percentage of objects catalogued in inventories

Count the total number of objects in the collection, at the end of the reporting period. If the real number is not available, an estimate should be made.

Count the number of records for the objects in the inventories, whether analogue or digital, at the end of the reporting period.

The percentage of objects catalogued in inventories is as shown in [Formula \(A.1\)](#)

$$\frac{A}{B} \times 100 \quad (\text{A.1})$$

where

A is the number of records for objects in the inventories;

B is the total number of objects.

Round off to the nearest integer.

A.1.1.5.2 To establish the percentage of objects catalogued in scientific catalogues

Count the total number of objects in the collection, at the end of the reporting period.

Count the number of records for the objects in scientific catalogues, whether analogue or digital, at the end of the reporting period.

The percentage of objects catalogued in scientific catalogues is shown in [Formula \(A.2\)](#):

$$\frac{A}{B} \times 100 \quad (\text{A.2})$$

where

A is the number of records for objects in the scientific catalogues;

B is the total number of objects.

Round off to the nearest integer.

A.1.1.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score is considered good. It means that a high percentage of the museum's collection is accessible via catalogues.

The score can be influenced by backlogs, e.g. if a museum has received large donations of materials that could not be handled within the reporting year.

If the score is low the museum could, for example:

- reconsider the level of description for specified groups of materials;
- look to technical aspects such as software and hardware performance;
- revise workflows.

A.1.1.7 Source

See Reference [\[10\]](#).

See Reference [\[14\]](#).

A.1.1.8 Related indicators

- [A.1.2](#) Percentage of all objects for which searchable records are available on the Internet

A.1.2 Percentage of all objects for which searchable records are available on the Internet

A.1.2.1 Background

Many museums today have introduced online catalogues. Notwithstanding that there are a high number of digital catalogues which are accessible only to the staff or in the museum itself, and also analogue inventories and catalogues that need to be converted into digital form in order to make records accessible for everybody via the web.

The percentage of all objects that are searchable via web catalogues can therefore be seen as quality criterion.

A.1.2.2 Objective of the indicator

To assess whether the records of the collection are accessible via the web. The indicator also measures the museum's engagement in promoting its collection on the web.

A.1.2.3 Scope

The indicator is applicable to all museums.

Comparison between museums can be affected by the degree of cataloguing (see indicator [A.2.1](#)) and by national or regional funding for the digitization of catalogues on analogue materials.

A.1.2.4 Definition of the indicator

Percentage of all objects in a museum's collection for which records can be retrieved in the web catalogue(s) of the museum, at the end of the reporting period.

A.1.2.5 Method

Count the total number of objects in the museum's collection. If the real number is not available, an estimate should be made.

Count the number of catalogue records that are contained in the museum's web catalogue(s).

The percentage of all objects for which searchable records are available on the Internet is shown in [Formula \(A.3\)](#):

$$\frac{A}{B} \times 100 \quad (\text{A.3})$$

where

A is the number of objects the records of which are searchable on the Internet;

B is the total number of objects in the museum's collection.

Round off to the nearest integer.

The indicator may be split up as to object groups (such as art objects, printed documents).

A.1.2.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score is considered good. It means that a high percentage of the museum's collection is retrievable via web catalogues and therefore can be easily located by users.

A.1.2.7 Source

ISO 11620:2014, B.1.2.6^[3]

A.1.2.8 Related indicators

— [A.1.1](#) Percentage of all objects catalogued

A.1.3 Number of loans per professional staff member**A.1.3.1 Background**

Applications to a museum for loans out of its collections usually require that the objects in the collection have been adequately catalogued, possibly also digitized, so that they can be identified by the applicants. In addition, lending out may involve pre-loan preparations such as documenting the preservation condition of the object and completing some conservation treatment. The whole lending process should be clearly documented and well planned.

For all these activities, professional museum staff are necessary. The number of objects loaned out per professional staff member can therefore be seen as indicator for the museum's engagement in lending materials to other museums and institutions.

A.1.3.2 Objective of the indicator

To assess the museum's engagement in lending out objects from its collection.

A.1.3.3 Scope

The indicator is applicable to all museums with professional staff.

Comparison over time and with the museum's goals will be important for each museum.

Comparison between museums of a similar type and size may be possible.

A.1.3.4 Definition of the indicator

The number of loans per professional staff member per year.

NOTE A professional staff member is defined as museum employee who has graduated at university level or in a special training course in the museum sector and whose duty requires professional education or experience.

A.1.3.5 Method

Count the number of loans to other museums and institutions during the reporting period, usually a year.

Establish the number of professional staff members (number of persons, in FTE).

The number of loans per professional staff member is shown as [Formula \(A.4\)](#):

$$\frac{A}{B} \tag{A.4}$$

where

A is the total number of loans;

B is the number of professional staff members.

Round to the nearest integer, or to one decimal place if less than 10.

A.1.3.6 Interpretation and factors affecting the indicator

The indicator is a positive real number with no top limit.

A high score is usually considered as good. It will show whether the museum staff engages in increasing access to the collection by lending objects to other museums or institutions.

The indicator will be influenced by several factors:

- the composition and fame of the collections: Outstanding materials may instigate more loan requests;
- the percentage of objects in the collections that are digitized and available on the Internet;
- the cooperation of the museum with other museums and institutions, such as in collections mobility projects;
- events such as exhibitions, or research activities that renew attention towards objects.

The indicator results can also be influenced by specific workload in a year that impedes lending processes.

A.1.3.7 Source

N/A

A.1.3.8 Related indicators

N/A

A.1.4 Percentage of storage space which has an appropriate environment

A.1.4.1 Background

Museums try to preserve their collections through safe storage, stable environment and preventive conservation.

The fundamental condition for preserving the collection is the storage in an environment that prevents damage to the objects. Temperature, relative humidity, light and atmospheric pollution should all be considered carefully with respect to their potential to damage museum collections. Environmental control therefore means day-to-day monitoring of storage and exhibition areas.

Which environmental conditions would be appropriate for a museum depends on the types of objects in the collection. As museums often house many different types of objects, the same storage environment may not be appropriate for all objects in a museum. This makes safe storage more difficult than, for example, in archives and libraries, as different standards should be considered.

A.1.4.2 Objective of the indicator

To assess whether the storage environment is appropriate for protecting the collection.

A.1.4.3 Scope

The indicator is applicable to all museums. The indicator should be applied to different types of objects separately.

Comparison between museums will only be possible if the museums house similar collections.

A.1.4.4 Definition of the indicator

The percentage of storage space for the physical collection that offers an appropriate environment.

NOTE 1 For this indicator, “appropriate environment” means adequate temperature, relative humidity (RH), light and air quality.

NOTE 2 The storage space includes exhibition and storage areas.

NOTE 3 Different types of objects have special needs for adequate storage.

A.1.4.5 Method

Define the appropriate environmental conditions for each type of objects in the museum's collection.

If the different types of objects (such as paper materials, photos, furniture) are stored in separate rooms, several appropriate conditions should be defined, if possible based on standards.

EXAMPLE

For the long-term preservation of paper materials, the adequacy of temperature, relative humidity, light and air quality is defined by the ranges recommended in ISO 11799.

If various types of objects are housed in the same rooms, the conditions should – if possible – be appropriate for the most endangered type of objects.

For exhibition areas, the climatic conditions shall consider preservation issues as well as the needs of visitors.

For each defined area, the environmental condition shall be assessed. Due to climate changes over the day and in the seasons, the data of temperature and relative humidity should be collected during a reporting year by non-stop measuring in storage and exhibition rooms with professional measuring instruments.

Define the adequate environment by using a four-point scale, with 1 as the lowest value. The values may be set as follows:

- 1 means ‘critical environment’
- 2 means ‘poor environment’
- 3 means ‘satisfactory environment’
- 4 means ‘very good environment’

Group the areas according to the values, and calculate the percentage corresponding to each value. The summed percentage of values 3 and 4 constitute the part of the storage space that has a satisfactory environment. The total percentage of values 1 and 2 constitute the part of the storage space with an inappropriate environment.

The area (in square meters) of storage and exhibition rooms with adequate environmental conditions is compared with the total area of storage and exhibition rooms in the library.

The percentage of storage space which has an appropriate environment is shown as [Formula \(A.5\)](#):

$$\frac{A}{B} \times 100 \quad (\text{A.5})$$

where

- A* is the area of storage and exhibition rooms with adequate environmental conditions;
- B* is the total area of storage and exhibition rooms in the museum.

Round off to the nearest integer.

A.1.4.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score is considered good. It means that a high percentage of the museum's collection has good chances of long-term preservation.

The score can be influenced by the structure and technical equipment of the museum's buildings that might make it difficult to maintain consistent conditions.

Environmental monitoring can be relatively easy and inexpensive. It may be difficult to attain the standards without installation of an air conditioning system, but it is important to aim for stability of environment given the potentially damaging influence of temperature and relative humidity. By using ultraviolet protective glass or filter, curtains and sunshade to avoid the penetration of sunlight, the environmental conditions in storage and exhibition rooms can be optimized.

The potential damage by pollution can be reduced by filtering external air entering storage areas, or if filtration is not possible, by closing windows and doors effectively. To minimize the internal pollution of materials, equipment components, such as paints, should be tested under this aspect.

A.1.4.7 Source

ISO 21248:2019, A.1.4.3^[8]

A.1.4.8 Related indicators

- [A.1.5](#) Percentage of the collection in satisfactory preservation
- [A.1.6](#) Percentage of objects needing conservation/restoration treatment that received such treatment

A.1.5 Percentage of the collection in satisfactory preservation

A.1.5.1 Background

Conservation as defined by ISO 5127^[2] consists of all preservation measures and actions applied to prevent, arrest or delay deterioration of a document or other material object. Preservation is more broadly defined as all measures taken, including financial and strategic decisions, to maintain the integrity and extend the life of documents or collections.

Documenting the preservation condition will help museums build up information over time to help in planning the care of collections, and such documentation aids to pick up adverse impact before lasting damage is done to objects. A condition check is often prompted by other collection care procedures, and the condition of objects may be checked at points of risk (such as before or after moving them).

Condition checks often include technical assessment, conservation treatment priority, environmental condition, hazard, and recommendations concerning display, environment, handling, packing and storage.

A.1.5.2 Objective of the indicator

To assess the adequacy of the museum's activities to preserve its collection.

A.1.5.3 Scope

The indicator is applicable to all museums.

The indicator may be applied to different types of objects separately.

Comparison over time and with the museum's goals will be important for each museum.

Comparison between museums will be possible if the museums house similar collections.

A.1.5.4 Definition of the indicator

The percentage of the collections that has an appropriate preservation condition.

A.1.5.5 Method

A random sample of, at least, 400 objects in the collection is surveyed as to the preservation condition of objects in the sample. Alternatively, a whole part of the collection with interrelated objects could be surveyed.

Define the appropriate condition by using a four-point scale, with 1 as the lowest value. The values may be set as follows:

- 1 means 'critical condition'
- 2 means 'poor condition'
- 3 means 'satisfactory condition'
- 4 means 'very good condition'

Group objects in the sample according to the values, and calculate the percentage corresponding to each value. The summed percentage of values 3 and 4 constitute the total percentage of the sample that has a satisfactory preservation condition. The total percentage of values 1 and 2 constitute the part of the sample with an inappropriate preservation condition.

The percentage of the collection in satisfactory preservation is shown as [Formula \(A.6\)](#):

$$\frac{A}{B} \times 100 \quad (\text{A.6})$$

where

A is the number of objects in satisfactory preservation;

B is the total number of objects in the sample

Round off to the nearest integer.

A.1.5.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score (normally over 50 %) is considered good.

If the score is low, actions to be taken could be:

- promoting the importance of preserving the cultural heritage in its original form via public media;
- trying for additional funds;
- exploring and adopting more cost-effective techniques, treatments and procedures for preservation.

A.1.5.7 Sources

ISO 21248:2019, A.1.4.1^[8]

Reference ^[19]

A.1.5.8 Related indicators

- [A.1.4](#) Percentage of storage space which has an appropriate environment
- [A.1.6](#) Percentage of objects needing conservation/restoration treatments that received such treatment

A.1.6 Percentage of objects needing conservation/restoration treatment that received such treatment

A.1.6.1 Background

Conservation as defined by ISO 5127^[2] consists of all preservation measures and actions applied to prevent, arrest or delay deterioration of a document or other material object.

Restoration is defined as preservation actions taken to return a document or other material object which has suffered deterioration or damage as closely as practicable to its original state.

Preservation is more broadly defined as all measures taken, including financial and strategic decisions, to maintain the integrity and extend the life of documents or collections.

Such preventive measures are usually much more cost-effective than intervention measures taken to remedy damage after deterioration has taken place. Conservation aims at preserving the materials in their original and authentic form taking into account their cultural, historical, aesthetic or artistic significance.

A.1.6.2 Objective of the indicator

To assess the museum's engagement in the conservation/restoration of objects in their original form.

A.1.6.3 Scope

The indicator is applicable to all museums, but especially interesting for museums with collections of high cultural value.

Comparison over time and with the museum's goals will be important for each museum.

Comparison between museums will be possible, if the museums house similar collections.

A.1.6.4 Definition of the indicator

The percentage of objects in the collection needing conservation/restoration treatment that received such treatment during the reporting period, usually a year.

NOTE It is irrelevant whether the conservation/restoration treatment was undertaken by the museum's own conservation staff or by (an) external professional conservator(s).

Objects needing conservation/restoration treatment are defined as objects showing signs of damage and objects that cannot be handled or moved freely without further damage.

A.1.6.5 Method

The number of objects needing conservation/restoration treatment is assessed by regular checking of the preservation state.

The number of objects that received conservation/restoration treatment is counted during a reporting year.

The percentage of objects needing conservation/restoration treatment that received such treatment is as shown in [Formula \(A.7\)](#).

$$\frac{A}{B} \times 100 \quad (\text{A.7})$$

where

- A* is the number of objects needing conservation/restoration treatment at the start of the reporting period that received such treatment during the reporting period;
- B* is the total number of objects needing conservation/restoration treatment at the start of the reporting period.

Round off to the nearest integer.

A.1.6.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score is considered good.

If the score is low, actions to be taken could be:

- promoting the importance of preserving the cultural heritage in its original form via public media;
- trying for additional funds;
- exploring and adopting more cost-effective techniques, treatments and procedures for preservation.

Deterioration of museum objects will show and develop differently in different materials, and the costs of restoration will vary greatly. Therefore, the indicator could be calculated separately for different types of materials, e.g. metal, textiles, paper.

A.1.6.7 Sources

ISO 11620:2014, B.1.2.8^[3]

See Reference [\[10\]](#) p.19 (Number of works treated in the last year)

A.1.6.8 Related indicators

- [A.1.4](#) Percentage of storage space which has an appropriate environment
- [A.1.5](#) Percentage of the collection in satisfactory preservation

A.2 Exhibitions

A.2.1 Percentage of exhibitions presenting 30 or more objects of which more than 33 % have not been shown together before

A.2.1.1 Background

Museum exhibitions have for a long time been rated mainly by the number of their visitors. Today, exhibitions are also judged by the “degree to which they contributed something” (Anderson, p.15^[10]), for example, an exhibition showing new concepts, new and/or unique objects or objects in novel constellations.

Such innovative exhibitions will not only enhance the attractiveness of the temporary exhibitions, but can also further and enrich research.

A.2.1.2 Objective of the indicator

To assess the uniqueness and inspiration of exhibitions.

A.2.1.3 Scope

The indicator is relevant for all museums.

Comparison between museums of a similar type and size may be possible.

A.2.1.4 Definition of the indicator

The percentage of temporary exhibitions organized or co-organized by the museum presenting 30 or more objects of which more than 33 % have not been shown together before.

NOTE 1 Temporary exhibitions can take place inside or outside the museum premises.

NOTE 2 Virtual exhibitions are excluded.

A.2.1.5 Method

Count the total number of a museum’s temporary exhibitions during the reporting period, usually a year.

Count the number of those exhibitions that presented 30 or more objects of which more than 33 % had not been shown together before.

The percentage of temporary exhibitions presenting 30 or more objects of which more than 33 % have not been shown together before is shown as [Formula \(A.8\)](#):

$$\frac{A}{B} \tag{A.8}$$

where

A is the number of exhibitions that presented 30 or more objects of which more than 33 % have not been shown together before;

B is the total number of the museum's temporary exhibitions.

Round off to the nearest integer.

A.2.1.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100. A high score is considered good. It means that the museum has organized exhibitions with novel concepts and objects.

The indicator can be influenced by problems in getting loans from other institutions, such as financial problems of insurances. Results can vary greatly over years.

A.2.1.7 Source

Reference [10] p.20

A.2.1.8 Related indicators

— [A.2.2](#) Percentage of travelling exhibitions

A.2.2 Percentage of travelling exhibitions

A.2.2.1 Background

Museum exhibitions have for a long time been rated mainly by the number of their visitors. Today, exhibitions are also judged by whether other museums and institutions are interested to show the exhibition in their own premises.

A.2.2.2 Objective of the indicator

To assess whether a museum's exhibitions reach a wide area of influence.

A.2.2.3 Scope

The indicator is especially relevant for large museums.

Comparison between museums of a similar type and mission may be possible.

A.2.2.4 Definition of the indicator

The number of temporary exhibitions arranged or co-arranged by the museum that are travelling to other museums or institutions nationally and internationally over the next three years.

NOTE 1 A travelling exhibition is defined as an exhibition that is shown consecutively in several locations.

NOTE 2 Virtual exhibitions are excluded.

A.2.2.5 Method

Count the total number of physical temporary exhibitions arranged or co-arranged by the museum within a specified period, usually one year.

NOTE 1 The exhibitions are only counted once, in the starting year.

Over the following three years, establish the number of those exhibitions that have been travelling to other museums or institutions nationally and internationally.

NOTE 2 Exhibitions travelling to the co-arranging museum are counted as travelling exhibitions.

The Percentage of travelling exhibitions is shown as [Formula \(A.9\)](#):

$$\frac{A}{B} \times 100 \quad (\text{A.9})$$

where

A is the number of travelling exhibitions;

B is the total number of physical temporary exhibitions during a specified period, usually one year.

Round off to the nearest integer.

A.2.2.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score is considered good. It means that a high percentage of the museum's exhibitions were interesting for other institutions and a wider public.

The indicator results can vary greatly over years and can be influenced by the availability of funding for exhibitions.

The indicator will be especially useful if applied consequently over years.

A.2.2.7 Source

Reference [\[10\]](#) p.15

A.2.2.8 Related indicators

- [A.2.1](#) Percentage of exhibitions presenting 30 or more objects of which more than 33 % have not been shown together before

A.2.3 Changes in the permanent exhibition per year

A.2.3.1 Background

The permanent exhibition of a museum will usually keep stable for some time, concentrated on the museum's mission and main goals, while temporary exhibitions can show additional materials and topics related to the museum's themes. Thus, the permanent exhibition might be in danger of becoming stale and outdated.

In order to maintain the interest of visitors, the structure and contents of the permanent exhibition should continually reflect new ideas and research results in the museum's topics. The changes in the permanent exhibition, if not caused by external events such as building activities, can be seen as quality indicator for the museum's exhibitions.

A.2.3.2 Objective of the indicator

To assess the up-to-dateness and therewith attractiveness of the permanent exhibition.

A.2.3.3 Scope

The indicator is relevant for all museums.

Comparison between museums of a similar type and size may be possible.

A.2.3.4 Definition of the indicator

The percentage of all objects on display in the permanent exhibition of a museum that have been either added or removed during the reporting period.

A.2.3.5 Method

Count the total number of objects on display in the permanent exhibition at the end of the reporting period, usually a year.

Count the number of objects that were removed from or added to the permanent exhibition during the reporting period.

The changes in the permanent exhibition per year is shown as [Formula \(A.10\)](#)

$$\frac{A}{B} \quad (A.10)$$

where

A is the number of objects that were removed from or added to the permanent exhibition during the reporting period;

B is the total number of objects on display in the permanent exhibition at the end of the reporting period.

Round off to the nearest integer.

A.2.3.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100. A high score is considered good. It means that the museum tries to keep the permanent exhibition up-to-date and attractive.

The results can vary greatly over years, if large parts of the permanent exhibition are organized according to new concepts during one year.

A.2.3.7 Source

Reference [\[11\]](#)

A.2.3.8 Related indicators

- [A.2.1](#) Percentage of exhibitions presenting 30 or more objects of which more than 33 % have not been shown together before

A.3 Digitization

A.3.1 Percentage of all objects digitized

A.3.1.1 Background

Museums hold important cultural heritage collections. An urgent scheme today is to make these collections universally available for research, education and the general public via digitization projects.

Digitization may have different aims:

- to conserve the original analogue material by substituting it for a digital surrogate;
- to make the material available to the public.

Therefore, the percentage of all objects in the museum's collection that have been digitized can be seen as a quality aspect both of preserving and of promoting the cultural heritage.

A.3.1.2 Objective of the indicator

To assess whether the objects in the museum's analogue collection have been digitized, and therewith to what extent the museum fulfils its task of making the cultural heritage publicly available in digitized format.

A.3.1.3 Scope

The indicator is applicable to all museums.

Comparison between museums can be affected by the variety and complexity of the objects that have to be digitized.

A.3.1.4 Definition of the indicator

The percentage of all objects in the museum's analogue collection that have been digitized, at the end of the reporting period.

NOTE 1 A two-dimensional or three-dimensional object is counted as digitized if its metadata and at least one image, sound or video recording are available in digital format.

NOTE 2 Documents such as autographs, books or audiovisual documents are counted as digitized if their metadata and their contents are available in digital format.

A.3.1.5 Method

Establish the total number of objects in the analogue collection, at the end of the reporting period. If the real number is not available, an estimate should be made.

Count the number of objects that have been digitized, at the end of the reporting period.

The percentage of all objects digitized is shown as [Formula \(A.11\)](#):

$$\frac{A}{B} \times 100 \quad (\text{A.11})$$

where

A is the number of objects that have been digitized;

B is the total number of objects.

Round off to the nearest integer.

NOTE The indicator can be used to cover different types of objects separately.

A.3.1.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score is considered good. It shows the museum's commitment to making its collection accessible.

The score can be influenced by national or regional programmes for digitizing the cultural heritage.

A.3.1.7 Source

ISO 18461:2016, 6.3.15^[6]

A.3.1.8 Related indicators

- [A.3.2](#) Percentage of all objects for which either one or more digital image(s) or sound or video recordings are available on the Internet

A.3.2 Percentage of all objects for which either one or more digital image(s) or sound or video recording(s) are available on the Internet

A.3.2.1 Background

When museums digitize their analogue collections, this can be done for preservation reasons. In that case, it will not be necessary to make all digitized objects available on the Internet. There may also be legal or technical reasons that impede the presentation of a digitized object on the Internet. The percentage of all objects digitized (see Indicator [A.5.1](#)) can therefore differ from the percentage of objects for which digital images or sound recordings are available on the Internet.

For the goal of making a museum's collection accessible for the public, availability on the Internet will be the most important criterion.

A.3.2.2 Objective of the indicator

To assess whether the objects in the museum's analogue collection have been digitized and are available via the Internet.

A.3.2.3 Scope

The indicator is applicable to all museums.

Comparison between museums can be affected by the variety and complexity of the objects that have been digitized.

A.3.2.4 Definition of the indicator

The percentage of all objects in a museum's analogue collection for which either one or more digital image(s) or sound or video recordings are available on the Internet, at the end of the reporting period.

NOTE 1 A two-dimensional or three-dimensional object is counted as digitized if its metadata and at least one image are available in digital format.

NOTE 2 Documents such as autographs, books or audiovisual documents are counted as digitized if their metadata and their contents are available in digital format.

A.3.2.5 Method

Establish the total number of objects in the analogue collection, at the end of the reporting period. If the real number is not available, an estimate should be made.

Count the number of objects that have been digitized and for which either one or more digital image(s) or sound or video recordings are available on the Internet, at the end of the reporting period.

The percentage of all objects for which either one or more digital image(s) or sound or video recordings are available on the Internet is shown as [Formula \(A.12\)](#):

$$\frac{A}{B} \times 100 \quad (\text{A.12})$$

where

A is the number of objects for which either one or more digital image(s) or sound or video recordings are available on the Internet;

B is the total number of objects.

Round off to the nearest integer.

NOTE The indicator can be split into different types of objects or subjects.

A.3.2.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score is considered good. It shows the museum's commitment to making its collection accessible.

The score can be influenced by national or regional programmes for digitizing the cultural heritage.

A.3.2.7 Source

ISO 18461:2016, 6.3.15^[6]

A.3.2.8 Related indicators

— [A.3.1](#) Percentage of all objects digitized

A.3.3 Number of online accesses per digitized object

A.3.3.1 Background

Museums try to make their collections universally available for research, education and the general public via digitization projects.

In order to evaluate the success of such measures, the usage of digitized objects should be assessed.

A.3.3.2 Objective of the indicator

To assess whether the museum has digitized objects that are relevant for research, education and the general public.

A.3.3.3 Scope

The indicator is applicable to all museums with digitized collections.

Comparison between museums is possible if differences in the digitized collections are taken into consideration.

A.3.3.4 Definition of the indicator

The number of online accesses per digitized object from the museum's collection during the reporting period, usually a year.

NOTE 1 For the purpose of this indicator, only such digitized objects are considered that are available for public access, either inside the museum or on the Internet.

NOTE 2 An online access is defined as a successful request of a museum-provided online service.

NOTE 3 One digitized object can have been accessed several times.

A.3.3.5 Method

Establish the number of objects that are digitized out of the museum's analogue collection and that are available for public access.

Count the number of online accesses to these objects during a specified time period, normally a year.

The number of online accesses per digitized object is shown as [Formula \(A.13\)](#):

$$\frac{A}{B} \quad (\text{A.13})$$

where

A is the number of online accesses to digitized objects;

B is the total number of digitized objects from the museum's collection that are available for online access.

Round off to the nearest integer.

A.3.3.6 Interpretation and factors affecting the indicator

The indicator is a positive integer with no top limit.

A high number of accesses will be regarded as good. It shows that the museum has digitized objects that are relevant for researchers or the general public.

The indicator may be affected by several factors, some outside the control of the museum. Examples are: the level of network access, whether or not fees are charged for access, and the promotion of the digitized collection.

The number of online accesses could also be affected by:

- the quality and efficiency of users' search strategies;
- the quality of metadata attached to the files;
- the efficiency of the search interface;
- the speed of the retrieval processes.

A.3.3.7 Source

ISO 11620:2014, B.2.1.5^[3]

A.3.3.8 Related indicators

- [A.3.1](#) Percentage of all objects digitized
- [A.3.2](#) Percentage of all objects for which either one or more digital image(s) or sound or video recordings are available on the Internet

A.4 Awareness and satisfaction

A.4.1 Percentage of survey respondents that know the museum

A.4.1.1 Background

It is vital for all types of museums that the public be aware of their existence, their topics and the possibilities that they offer to visitors. This awareness level will influence not only the inflow of visitors, but also the liberality of funders and donators.

A.4.1.2 Objective of the performance indicator

To assess to what extent a museum is known to the public.

A.4.1.3 Scope

The indicator is applicable to all museums.

Comparison between museums of a similar type and mission may be possible.

A.4.1.4 Definition of the performance indicator

The percentage of survey respondents that state that they know the museum.

NOTE This does not necessarily mean that the respondents have already visited the museum.

A.4.1.5 Method

Design a short survey with questions about the awareness of the museum and its specific tasks. Questions to be asked could be:

- whether the interviewees know that there is a museum with such tasks;
- whether they know the name of the museum.

The percentage of survey respondents that know the museum is shown as [Formula \(A.14\)](#):

$$\frac{A}{B} \times 100 \quad (\text{A.14})$$

where

A is the number of persons answering “yes” to at least one of the questions;

B is the total number of persons answering.

Round off to the nearest integer.

NOTE One way of assessing the public awareness of a museum is the “street survey”, where a random sample of passers-by is interviewed with a list of predetermined questions.

The population from which the interviewees are taken should as much as possible correspond to the individual museum's target groups.

A.4.1.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score is considered good. It shows whether the museum has succeeded in making itself known.

A museum's awareness level can be influenced by its tasks and collections. For example, a museum of local history will not be as widely known as a museum with nationally or internationally relevant tasks, collections and activities. Comparisons between museums of different types are therefore of limited validity.

The indicator could be used together with indicator [A.4.3](#), for local museums also [A.4.2](#).

A.4.1.7 Source

Reference [11]

A.4.1.8 Related indicators

- [A.4.2](#) Percentage of survey respondents who feel it is important that the community has a local museum
- [A.4.3](#) Percentage of survey respondents who visited the museum in the last year

A.4.2 Percentage of survey respondents who feel it is important that the community has their own museum

A.4.2.1 Background

Local museums usually aim at giving a comprehensive picture of a community, from social and cultural aspects to the natural environment. They preserve the collective heritage of the community and thus help to create a local identity, a sense of belonging to the community.

“Community” refers not only to administrative areas, but also to shared interests, such as sports, political themes.

A survey can show whether the museum has achieved these goals.

A.4.2.2 Objective of the performance indicator

To assess whether the value of a local museum is recognized by the public.

A.4.2.3 Scope

The indicator is applicable to all local museums.

Comparison between museums of a similar type and mission may be possible.

A.4.2.4 Definition of the performance indicator

The percentage of survey respondents who feel it is important that the community has a local museum.

NOTE 1 This does not necessarily mean that the respondents have already visited the museum.

NOTE 2 A community can house more than one local museum.

A.4.2.5 Method

Survey a sample of persons outside the museum as to their perception of the local museum's importance. The question is:

- Do you feel it is important that this community has a local museum?

The Percentage of survey respondents who feel it is important that the community has a local museum is as shown in [Formula \(A.15\)](#):

$$\frac{A}{B} \times 100 \quad (\text{A.15})$$

where

- A* is the number of persons answering "yes" to the question;
- B* is the total number of persons answering.

Round off to the nearest integer.

In order to get a more detailed result, a five-point scale could be offered for answering this question:

- How important is it for you personally that the community has a local museum?
(quite unimportant 1 – 2 – 3 – 4 – 5 extremely important)

In that case, an average rating of importance could be calculated from the answers.

A.4.2.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score is considered good. It shows that the museum is considered valuable for the community.

The indicator could be used together with indicators [A.4.1](#) and [A.4.3](#).

A.4.2.7 Source

Reference [\[15\]](#)

A.4.2.8 Related indicators

- [A.4.1](#) Percentage of survey respondents that know the museum
- [A.4.3](#) Percentage of survey respondents who visited the museum in the last year
- [A.4.6](#) Percentage of visitors who would recommend a visit

A.4.3 Percentage of survey respondents who visited the museum in the last year

A.4.3.1 Background

Though visit numbers are no longer the main criterion for museum quality, a high number of visitors will still be desirable for most museums.

A.4.3.2 Objective of the performance indicator

To assess whether the museum attracts visitors.

A.4.3.3 Scope

The indicator is applicable to all museums.

Comparison between museums of a similar type and mission may be possible.

A.4.3.4 Definition of the performance indicator

The percentage of survey respondents that state that they visited the museum in the last year.

A.4.3.5 Method

Survey a sample of persons outside the museum as to their museum visits. The question is:

— Did you visit this museum during the last year?

NOTE Museums whose visitors tend to come in longer time intervals might instead ask for visits within a five-year period.

The percentage of survey respondents who visited the museum in the last year is shown as [Formula \(A.16\)](#):

$$\frac{A}{B} \times 100 \quad (\text{A.16})$$

where

A is the number of persons answering “yes” to the question;

B is the total number of persons answering.

Round off to the nearest integer.

In order to get a more detailed result, the survey could in addition ask for the number of visits during the last year:

How often did you visit the museum?

- once;
- 2 to 3 times;
- 4 to 10 times;
- more than 10 times.

The survey could also be split up as to specific groups, e.g. children, seniors, or persons from outside the museum’s community.

A.4.3.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score is considered good. It shows that the museum is attractive for visitors.

The indicator could be used together with indicators [A.4.1](#) and, for local museums, with [A.4.2](#).

A.4.3.7 Source

N/A

A.4.3.8 Related indicators

- [A.4.1](#) Percentage of survey respondents that know the museum
- [A.4.8](#) Percentage of repeat visits

A.4.4 Visitor satisfaction

A.4.4.1 Background

For all types of museums, the assessment of visitors' satisfaction with their museum visits is a crucial issue. Visitors can be asked in direct interviews as to their experiences and wishes. An easier way is the survey with pre-formulated questions that asks for the satisfaction of the visitors with their visit. Questionnaires can be handed out at the exit, or a web-based survey can be put on the museum website.

Satisfaction surveys will assist in adapting a museum's exhibitions and other services to the needs and interests of the visitors. They reveal reasons for dissatisfaction and thus help to detect problems and shortcomings in the museum.

A.4.4.2 Objective of the performance indicator

To assess the degree to which users are satisfied with their visit.

A.4.4.3 Scope

The indicator is applicable to all museums.

Comparing the same museum at different points in time is possible and is recommended, as it can help to assess the museum's development over time. If the same questions and scale are used the survey can also be used as an analysing tool on a wider scale.

Comparing different museums is, in general, very difficult, even within the same museum type.

A.4.4.4 Definition of the performance indicator

The average rating given by visitors on a numeric scale ranging from very unsatisfactory to very satisfactory expressing their experience of their museum visit.

The rating should be on a numeric scale, either:

- a four-point scale, from 1 to 4 with 1 as the lowest value;
- a five-point scale, from 1 to 5 with 1 as the lowest value, or
- a seven-point scale, from 1 to 7 with 1 as the lowest value.

NOTE Virtual visits are excluded.

A.4.4.5 Method

The museum designs a short questionnaire for the visitors. Questions about the status of the visitors could be included in the questionnaire in order to differentiate between the wishes of the different visitor groups.

A four-, five-, or seven-point scale is generally provided for rating the satisfaction.

The contents of the questionnaire could be as follows:

- Visitor status, e.g. age group, status (researcher, student, educator, others);

- Purpose of the visit (e.g. visit to the permanent exhibition, visit to a temporary exhibition, cultural event, guided tour, programme, research, other);
- Frequency of museum visits (first-time, repeat visit);
- Satisfaction with the visit (on a numeric scale).

Space should be given for additional comments.

The visitor satisfaction is shown as [Formula \(A.17\)](#):

$$\frac{A}{B} \quad (\text{A.17})$$

where

A is the sum of the values indicated by the visitors;

B is the number of persons answering the questions.

Round off to one decimal place.

A.4.4.6 Interpretation and factors affecting the indicator

The indicator is a number with one decimal place between 1 and 4, 1 and 5, or 1 and 7, depending on the scale chosen.

For the interpretation of the scores it will be important to bear in mind that the results are based on the subjective opinion of a sample of visitors. Individual circumstances at the time of the survey can influence the answers.

High satisfaction rates will be seen as good. The open comments of visitors in the questionnaire can give more information why the visitors liked or disliked their visit.

The indicator Visitor satisfaction should always be used together with other indicators for service quality and with statistics of visits.

A.4.4.7 Source

ISO 11620: 2014, B.2.4.2[3]

A.4.4.8 Related indicators

- [A.4.5](#) Willingness to return
- [A.4.6](#) Percentage of visitors who would recommend a visit

A.4.5 Willingness to return

A.4.5.1 Background

Usually, museums, like other cultural institutions, would like their visitors to come repeatedly to the exhibitions and events. Repeat visits will also be important for the impact on visitors, for example, for their gaining more profound knowledge about the museum's topics.

A.4.5.2 Objective of the indicator

To assess whether visitors' experience at a museum motivates their intention to come again.

A.4.5.3 Scope

The indicator is applicable to all museums.

Comparison between museums is possible.

The indicator cannot assess whether visitors actually return to the museum.

A.4.5.4 Definition of the indicator

The percentage of physical museum visits after which visitors state that they are willing to return to the museum for another visit.

NOTE 1 Visits can concern the permanent or temporary exhibitions and all events, organized by the museum.

NOTE 2 Virtual visits are excluded.

A.4.5.5 Method

Visitors are asked after a museum visit in a follow-up interview or survey as to their willingness to return:

- Based on the experience of this visit, if you had the option, would you return to this museum for another visit?

The willingness to return is shown as [Formula \(A.18\)](#):

$$\frac{A}{B} \times 100 \quad (\text{A.18})$$

where

A is the number of persons answering “yes”;

B is the total number of persons answering.

Round off to the nearest integer.

In order to know more about the reasons of willingness or non-willingness to return, museums could ask more questions such as:

- Did you already visit the museum before this visit? (yes/no)
- What did you do in the museum during this visit?
(visit the permanent exhibition, a specific exhibition, attend an event, ...)
- Did you enjoy your visit?
- Did you learn something for your personal interests?

A.4.5.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score is considered good. It means that a high percentage of visits were satisfactory and enjoyable according to the rating of the visitors.

A.4.5.7 Source

ISO 11620:2014, B.2.4.3^[3]

A.4.5.8 Related indicators

- [A.4.4](#) Visitor satisfaction
- [A.4.6](#) Percentage of visitors who would recommend a visit

A.4.6 Percentage of visitors who would recommend a visit**A.4.6.1 Background**

Museum visitors can be asked about their enjoyment of and satisfaction with the visit, or about their willingness to return to the museum. Another possibility is to ask the visitors whether they can recommend visiting the museum to their friends or acquaintances.

A.4.6.2 Objective of the indicator

To assess whether visitors' experience at a museum motivate them to recommend a visit to others.

A.4.6.3 Scope

The indicator is applicable to all museums.

Comparison between museums is possible.

A.4.6.4 Definition of the indicator

The percentage of a museum's visitors who say they would recommend a visit to this museum to others.

A.4.6.5 Method

After a museum visit, visitors are asked in a follow-up survey whether they would recommend a visit of the same museum to others:

- Based on the experience of this visit, would you recommend a visit of this museum to others?
(definitely yes, probably yes, probably not, definitely not)

The percentage of visitors who would recommend a visit is shown as [Formula \(A.19\)](#):

$$\frac{A}{B} \times 100 \quad (\text{A.19})$$

where

A is the number of persons answering "definitely yes";

B is the total number of persons answering.

Round off to the nearest integer.

For a more detailed evaluation, the survey could use a more detailed scale or could ask in addition for the reason of recommending or not recommending the visit.

A.4.6.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score is considered good. It means that a high percentage of visits were so satisfactory and enjoyable that the visitors would recommend the visit to others.

A.4.6.7 Source

Reference [12]

A.4.6.8 Related indicators

- [A.4.4](#) Visitor satisfaction
- [A.4.5](#) Willingness to return

A.4.7 Satisfaction of visitors with special needs with the access options

A.4.7.1 Background

Museums should guarantee open access to their exhibitions and services for all interested persons. They should ensure that the following groups are not deterred from or hindered in visiting a museum:

- persons who are visually impaired;
- persons with hearing difficulties;
- persons with physical difficulties;
- persons with learning difficulties;
- persons with other difficulties.

For all those persons the accessibility of the museum should be supported by the barrier-free layout and construction of the building, by a clear signage system and easily understandable language on leaflets, etc.

Independence in the museum visit should have priority over help and guidance.

A.4.7.2 Objective of the performance indicator

To assess the degree to which visitors with special needs are satisfied with the access options of the museum.

A.4.7.3 Scope

The indicator is applicable to all museums.

Comparison between museums with similar conditions may be possible.

A.4.7.4 Definition of the performance indicator

The average rating given by visitors with special needs on a five-point scale ranging from very unsatisfactory to very satisfactory expressing their experience of the museum's accessibility.

Visitors with special needs are defined as persons that require special services and/or facilities for their museum visit.

A.4.7.5 Method

The museum designs a short questionnaire for visitors with special needs. Questions about the visitor's special needs could be included in the questionnaire in order to differentiate between the needs of the different groups.

The survey could contain the following questions:

- Which of these best describes your type of difficulty? (visual impairment, hearing difficulty, physical difficulty, learning difficulty, other difficulty)

It should be added that this information will be entirely confidential and will only be used for analysis purposes.

NOTE The question could be put to accompanying persons.

- How would you rate the access to the rooms or facilities of the museum that you visited? (e.g. entrance hall, permanent exhibition, temporary exhibition, auditorium, area for events, cafeteria, toilets, other)

(please give a number between 1-5, where 1 = access is very poor and 5 = access is very good)

Space should be given for additional comments.

This indicator needs to be used separately for different types of difficulties. A two-step approach may be helpful.

The mean satisfaction of visitors with special needs with the access options is shown as [Formula \(A.20\)](#):

$$\frac{A}{B} \quad (\text{A.20})$$

where

A is the sum of the values for the accessibility of each room or facility indicated by the visitor;

B is the number of rooms or facilities visited by the visitor.

Round off to one decimal place.

Out of the mean satisfaction rates of individual visitors, a general satisfaction rate of visitors with special needs with the access options can be calculated.

The mean satisfaction of visitors with special needs with the access options is then shown as [Formula \(A.21\)](#):

$$\frac{A}{B} \quad (\text{A.21})$$

where

A is the sum of the mean satisfaction rates indicated by the individual visitors;

B is the number of persons answering the questions.

A.4.7.6 Interpretation and factors affecting the indicator

The indicator is a number with one decimal place between 1 and 5.

For the interpretation of the scores it will be important to bear in mind that the results are based on the subjective opinion of a sample of visitors. Individual circumstances at the time of the visit, such as building activities, can influence the answers.

The open comments of visitors in the questionnaire and the information as to their special needs can give more information about the reasons for dissatisfaction and can suggest measures to be taken for better access options.

A.4.7.7 Source

Reference [17]

A.4.7.8 Related indicators

N/A

A.4.8 Percentage of repeat visits

A.4.8.1 Background

Usually, museums, like other cultural institutions, would like their visitors to come repeatedly to the exhibitions and events. Repeat visits will also be important for the impact on visitors, e.g. for their gaining more profound knowledge about the museum's topics.

A.4.8.2 Objective of the performance indicator

To assess whether visitors' experience at a museum motivates them to come again.

A.4.8.3 Scope

The indicator is applicable to all museums.

Comparison between museums of a similar type and mission may be possible.

A.4.8.4 Definition of the indicator

The percentage of all visits to the museum that are repeat visits.

NOTE 1 Visits can concern the permanent or temporary exhibitions and all events inside the museum premises.

NOTE 2 Virtual visits are excluded.

A.4.8.5 Method

Visitors are asked (in a survey) before or after a museum visit whether they have visited the museum before.

The percentage of repeat visits is shown as [Formula \(A.22\)](#):

$$\frac{A}{B} \times 100 \tag{A.22}$$

where

A is the number of visitors stating that they already visited the museum;

B is the total number of visitors asked.

Round off to the nearest integer.

The survey could also be split up as to specific groups, e.g. children, seniors, or persons from outside the museum's community.

Round off to the nearest integer.

A.4.8.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100.

A high score is considered good. It shows that the museum is able to attract visitors repeatedly.

A.4.8.7 Source

Reference [15] (Average repeat visits)

A.4.8.8 Related indicators

- [A.4.3](#) Percentage of survey respondents who visited the museum in the last year
- [A.4.5](#) Willingness to return
- [A.4.9](#) Percentage of increase in first-time visits

A.4.9 Percentage of increase in first-time visits**A.4.9.1 Background**

Museums want their visitors to return frequently, but it is equally important for them to gain new visitors. The annual increase in first-time visitors can therefore be seen as quality criterion.

A.4.9.2 Objective of the performance indicator

To assess whether the museum succeeds in gaining new visitors every year.

A.4.9.3 Scope

The indicator is applicable to all museums.

Comparison between museums of a similar type and mission may be possible.

The indicator may not be applicable for museums which have reached their maximum visitor capacity.

A.4.9.4 Definition of the performance indicator

The percentage of increase in first-time visits, compared with the previous year.

NOTE 1 Visits can concern the permanent or temporary exhibitions and all events inside the museum premises.

NOTE 2 Virtual visits are excluded.

A.4.9.5 Method

Establish the number of first-time visits for two successive years, by doing visitor surveys.

Calculate the increase (or decrease) of first-time visits.

The percentage of increase in first-time visits is shown as [Formula \(A.23\)](#):

$$\frac{(B-A)}{B} \times 100 \quad (\text{A.23})$$

where

A is the number of first-time visits in year 1;

B is the number of first-time visits in year 2.

Round off to the nearest integer.

A.4.9.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100, or 0 and – 100.

A high score is considered good. It shows that the museum is able to attract new visitors.

The indicator can be influenced by museum policies, for instance by the aim to prioritize visits from special target groups.

The indicator is especially useful when applied over several years.

A.4.9.7 Source

N/A

A.4.9.8 Related indicators

— [A.4.8](#) Percentage of repeat visits

A.4.10 Percentage of increase in visits

A.4.10.1 Background

A high number of visitors reflect the attraction of the museum's exhibitions and collection as well as the quality of curatorial and conservational work. Museums will put efforts into increasing its number of visitors, by updating their exhibitions and adapting their activities towards their visitors.

A.4.10.2 Objective of the indicator

To assess whether the number of visitors increases.

A.4.10.3 Scope

The indicator is applicable to all museums.

Comparison over time and with the museum's goal will be important for each museum.

Comparison between museums will be possible, if the museums have similar collections and/or target groups.

The indicator may not be applicable for museums which have reached their maximum visitor capacity.

A.4.10.4 Definition of the indicator

The percentage of increase in the number of visits during one year as compared to the previous year

A.4.10.5 Method

Establish the number of visits for two successive years. Visits may be counted at either entrance or exit by one of the following methods:

— automatic counting by a device;

- manual counting;
- number of tickets sold and/or given away for free.

Calculate the increase (or decrease) of visits.

The percentage of increase in visits is shown as [Formula \(A.24\)](#):

$$\frac{(B-A)}{B} \times 100 \quad (\text{A.24})$$

where

A is the number of visits in year 1;

B is the number of visits in year 2.

Round off to the nearest integer

A.4.10.6 Interpretation and factors affecting the indicator

The indicator is an integer between 0 and 100, or 0 and – 100.

A high score is considered good as it shows the museum's attractiveness for visitors.

The indicator can be influenced by museum policies, for instance by the aim to prioritize visits from special target groups.

The indicator is especially useful when applied over several years.

A.4.10.7 Source

ISO 18461:2016, 6.3.4.1^[6]

A.4.10.8 Related indicators

- [A.4.4](#) Visitor satisfaction
- [A.4.5](#) Willingness to return
- [A.4.8](#) Percentage of repeat visits
- [A.4.9](#) Percentage of increase in first-time visits

A.5 Education and events

A.5.1 Satisfaction of attendants with educational events

A.5.1.1 Background

Museums have traditionally informed visitors about their collections and exhibitions by guided tours, lectures or brochures.

Museums support education and learning by offering learning sessions, learning materials and programmes for children and adults, related to the museum's mission, collections and themes. They provide services for schools and cooperate with other museums in preparing and offering educational services. As the development and maintenance of such services is labour-intensive, it will be especially valuable for a museum to assess the attendants' experience of educational events.

A.5.1.2 Objective of the performance indicator

To assess the degree to which attendants of an educational museum event are satisfied with the event.

A.5.1.3 Scope

The indicator is applicable to all museums with educational services.

Comparing the same museum at different points in time is possible. For comparisons between museums, differences in target groups and in the character of events should be considered.

A.5.1.4 Definition of the performance indicator

The average rating given by visitors on a numeric scale ranging from very unsatisfactory to very satisfactory expressing their experience at an educational museum event.

The rating should be on a numeric scale, either:

- a four-point scale, from 1 to 4 with 1 as the lowest value;
- a five-point scale, from 1 to 5 with 1 as the lowest value, or
- a seven-point scale, from 1 to 7 with 1 as the lowest value.

An educational event is a pre-arranged singular activity for children and/or adults for the purpose of enhancing knowledge about the collections and themes of the museum.

A.5.1.5 Method

The museum designs a short questionnaire for the attendants of the event. Questions about the status of the attendants could be included in the questionnaire in order to acknowledge differences in the target groups.

The contents of the questionnaire could be as follows:

- Attendant status, e.g. age group, status (researcher, student, educator, others);
- Type of educational event, e.g. learning session, discussion, cinema show, lecture, other;
- Satisfaction with the event (on a numeric scale).

Space should be given for additional comments.

The satisfaction of attendants with educational events is shown as [Formula \(A.25\)](#):

$$\frac{A}{B} \tag{A.25}$$

where

A is the sum of the values indicated by the attendants;

B is the number of persons answering the questions.

Round off to one decimal place.

To get more details, the attendants could also be asked for the reasons of their satisfaction or dissatisfaction. Another question could be whether they feel that they have learned something new.

A.5.1.6 Interpretation and factors affecting the indicator

The indicator is a number with one decimal place between 1 and 4, 1 and 5, or 1 and 7, depending on the scale chosen.

High satisfaction rates will be seen as good. The open comments of visitors in the questionnaire can give more information about the reasons for dissatisfaction.

The indicator can be applied to different types of events separately.

The indicator Satisfaction of attendants with educational events should always be used together with statistics of attendances.

A.5.1.7 Source

N/A

A.5.1.8 Related indicators

— [A.4.6](#) Percentage of visitors who would recommend a visit

A.5.2 Percentage of staff in educational services**A.5.2.1 Background**

In recent years, museums are increasingly supporting education and learning by offering learning sessions, learning materials and programmes for children and adults, related to the museum's mission, collections and themes. Museums provide services for schools and cooperate with other museums in preparing and offering educational services.

The investment of staff resources in educational services can therefore be seen as an indicator of the museum's engagement in this important task.

A.5.2.2 Objective of the performance indicator

To assess the extent to which a museum invests human resources in providing educational services.

A.5.2.3 Scope

The indicator is applicable to all museums with educational services.

Comparison between museums is possible.

A.5.2.4 Definition of the performance indicator

The number of museum staff (FTEs) in educational services divided by the total number of museum staff (FTEs).

Educational services comprise learning sessions and learning materials and programmes in all formats for children and adults for the purpose of enhancing skills and knowledge.

A.5.2.5 Method

The number of museum staff (FTEs) in educational services is calculated by adding the time spent by all permanent and temporary staff including project staff, in planning, developing and offering educational services.

Since many staff members contribute time to educational services, data should be collected by sampling. The staff is required to keep work diaries or time logs for a week, or for several representative days,

and the amount of time spent on educational services is then calculated as a percentage of the total staff time worked during the sampling period.

If time logging is not possible, this proportion can instead be estimated.

The percentage of staff in educational services is shown as [Formula \(A.26\)](#):

$$\frac{A}{B} \times 100 \quad (\text{A.26})$$

where

A is the number of museum staff (FTEs) planning, developing and offering educational services;

B is the total number of museum staff (FTEs).

Round off to one decimal place.

A.5.2.6 Interpretation and factors affecting the indicator

The indicator is a real number between 0 and 100.

A high percentage will be considered as good, as it shows the engagement of the museum in its educational role.

The indicator results can vary over years and can be influenced by the availability of funding for projects.

The indicator will be especially useful if applied consecutively over years.

A.5.2.7 Source

N/A

A.5.2.8 Related indicators

N/A

A.5.3 Percentage of schools in the relevant surroundings reached

A.5.3.1 Background

In recent years, museums are increasingly supporting education and learning by offering learning sessions, learning materials and programmes for children, related to the museum's mission, collections and themes. In particular, museums develop and provide such services for schools.

As the investment of staff resources in these educational services is high, museums should know whether they reach the schools in their surrounding by the services.

A.5.3.2 Objective of the performance indicator

To assess whether the schools in a museum's surrounding make use of the educational services offered by the museum.

The indicator also assesses whether the museum has adapted its educational services to the needs of the schools.

A.5.3.3 Scope

The indicator is applicable to all museums that offer educational services for schools.