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Welsh Government

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# Museum Spotlight Survey: 2022 (summary)

The survey has a unique role in monitoring and assessing the ongoing health of the museum sector in Wales. This is the latest iteration of the survey since the COVID-19 pandemic.

**First published:** 12 September 2023

**Last updated:** 12 September 2023

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# Introduction and background

The Museum Spotlight Survey has a unique role in monitoring and assessing the ongoing health of the museum sector in Wales. Historically, Spotlight has provided vital data to inform planning, funding, and other strategic decisions in the museum context since its inception in 2006. The report draws on comparator data from previous survey rounds, in particular data collected in 2019 <sup>[[footnote 1](#)]</sup>. This research represents an opportunity to increase the reach and impact of the data generated both for the Welsh Government and for the museum sector in Wales.

Emma Chaplin Heritage and Museum Services was commissioned by the Culture Division of Welsh Government to undertake the Museum Spotlight Survey 2022 and to provide support to the museum sector in advance of and during the fieldwork. Additionally, a series of dissemination and engagement sessions with the museum sector are planned to communicate key findings.

## Methodology

The Spotlight Survey captures both quantitative and qualitative data and the questions provide nominal, ordinal and interval data.

A full survey questionnaire was sent to all accredited museums in Wales. This gave a total possible sample size of 111 museums. Seventy-seven responses were received representing a 69% return rate.

The survey was open for four weeks from 24 February 2023. Individual extensions were given up until the first week of April to ensure outstanding responses were received. Two virtual bilingual support workshops were delivered during the survey period. Additional support was provided via a

dedicated email mailbox.

## Findings

All findings relate to the responses from the 77 museums completing the Spotlight 2022 survey.

### Museum visitors

In 2022 there were 3,011,763 visits to the museums in Wales that completed the survey. This compares to 4,333,520 visits in 2019. Museum visitor levels overall have recovered to 69% of pre Covid-19 levels. National Trust, independent and university museums are at over 80% recovery.

### Financial overview

Average operating budgets for museums in the survey show mostly standstill budgets from 2018 to 2021 for independent and local authority museums. National Trust properties show a drop for this period, but this may be related to site specific activities. University museums also show a drop in average operating budgets.

75% of museums completing Spotlight 2022 receive support from their local authority. This includes direct revenue support for museums run as a local authority service, financial support through business rates relief and regular revenue funding. Support may also be in-kind through free and low-cost occupancy of buildings, building maintenance services and mentor support under the terms of the accreditation scheme <sup>[footnote 2]</sup>. Of those receiving support, 15% report a rise in support levels, 33% report a fall in support and

52% report support levels staying the same.

Over 70% of museums responding to the survey successfully bring grant funding into their sites from sources including government, sector funders, major grant giving bodies and specialist charities.

70% of museums in the survey reported charging for specific exhibitions or services beyond general admission charges. This was reported by museums of all governance types including those who charge and do not charge for general admission. Other examples of sources of income included room hire, tours and workshops, image licensing, filming, object research and formal teaching.

## **Museum workforce**

In 2022 the 77 museums in Wales completing the survey employed 1,414 staff (893 FTE staff).

Of the 893 FTE staff employed 60% (538 FTE) are employed at national sites and 25% (226 FTE) at local authority and independent museums.

FTE staffing across the museum sector remains relatively stable overall although both independent and university museums have seen increases of 19 and 32 percentage points respectively in staffing between the 2019 and 2022 Spotlight surveys.

In 2022 there were 1,893 volunteers contributing 180,137 hours of volunteer support. There has been a drop in the overall number of volunteers in the Welsh museums sector since the 2019 survey compared to employed staff. This is shown in the percentage of volunteers making up the sector across the two surveys, with an overall drop of 32 percentage points between the 2019 and 2022 surveys. Only university museums have increased their volunteer numbers.

## Collections

Museums responding to Spotlight 2022 have over 6,300,000 objects in their collections. Almost 80% of them are held in national museums.

The Spotlight 2022 data confirms that almost 90% of museums in Wales are likely to have overcrowded stores in less than 5 years. 88% of museum respondents reported that they are already overcrowded or will be in less than 5 years. This figure is identical (88%) to the results of Spotlight 2019, although the breakdown was slightly different (61% already overcrowded in 2019 against 57% in 2023).

Almost all museums offer some online access to their collections. Over half of museums use the People's Collection Wales website <sup>[footnote 3]</sup> to provide digital access.

## Learning

In 2022 museums completing the survey welcomed 319,664 learning participants. There were 5,463 formal learning sessions with 160,123 participants and 2,165 informal learning sessions with 159,541 participants. Both formal and informal learning audiences are yet to recover to pre-pandemic levels. Recovery is underway but not yet complete.

## Equality, diversity and inclusion

79% of museums provided targeted provision between 2019 and 2022 for audiences with protected characteristics. 26% had targeted provision around disability, 25% on sexual orientation and 23% on race and ethnicity. Additionally, 43% of museums provided targeted provision for people with dementia. Sixteen

of the 77 museums who responded reported that they had not provided any exhibitions, events or activities targeting specific communities since the 2019 survey.

17% of the museums completing the survey have engaged in all five of the priority activities listed in the Anti Racist Wales Action Plan.

34% of museum staff are Welsh speakers alongside 19% of trustees and 18% of volunteers.

## **Environmental sustainability**

The responses indicate that 13% of museums are at a medium risk or higher of flooding from rivers, while almost 17% are at a medium risk or higher of flooding from surface water or small watercourses.

No respondents reported that they had used Julie's Bicycle carbon calculator tool.

## **COVID-19 recovery**

One third of museums responding to the survey reported a disruption to opening patterns during 2022. Visitor numbers, figures for engagement in formal learning, and responses to 'What do you see as the greatest challenges to your museum in the next two years?' suggest that recovery for organisations from the pandemic is far from complete or secure.

## **Partnerships**

64% of non-national museums have used services provided by Amgueddfa

Cymru - Museum Wales, with over half of those having used more than one service. Object loan, conservation advice and collections advice are the most frequently used services.

21% of museums completing the survey reported that they had been asked to supply data as part of the Wellbeing of Future Generations Act reporting. This comprised of 9 Local Authority museums (36%) and 7 national museum sites (100%).

## Footnotes

[1] [Spotlight on Museums 2020](#)

[2] [UK Museum Accreditation Scheme \(Arts Council England\)](#)

[3] [People's Collection Wales](#)

## Contact details

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Views expressed in this report are those of the researchers and not necessarily those of the Welsh Government.

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Social research number: 83/2023

Digital ISBN 978-1-83504-654-8





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