Review of the Culture Sector Evidence Base in Wales

Phase 1 report

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1.   Introduction

1.1   The Co-Operation Agreement[1] and updated Programme for Government[2] has committed to develop the new Culture Strategy for Wales. The strategy will focus on supporting and developing the arts, culture, and heritage sectors, including the role of culture in promoting positive health and well-being, lifelong learning and skills, supporting digital developments in Wales, the visitor economy, and the Welsh Language, together with resilience building to enable effective recovery from the Covid-19 pandemic and delivery on the requirements of the Well-being of Future Generations (Wales) Act 2015[3].

1.2   To develop the new Culture Strategy for Wales, it is important that policymakers and stakeholders have access to data on the size, composition and impact of the culture sector. To support this, the Welsh Government has commissioned Alma Economics to review and map the availability of data and evidence on the culture sector in Wales. This will include identifying and assessing existing sources and evidence gaps of information across cultural areas of interest including Museums, the Arts, Libraries, Archives and Heritage.

1.3   This review is structured across two phases. The first phase of work ('Phase 1') involves a scoping exercise to identify relevant data sources and conduct an initial review of existing data. Additionally, key stakeholders will be engaged during this phase to determine the primary topics and research questions to be explored in the subsequent phase of the work ('Phase 2'). Phase 2 will aim to map all identified data and evidence sources against the main topics and research questions determined in Phase 1. Additionally, a detailed statistical report will be produced, providing a comprehensive overview of the five culture sub-sectors based on the available data.

1.4   Following completion of the first phase of research, this report details the findings of Phase 1 and sets out the recommended research questions and scope to be addressed in Phase 2.

1.5   The remainder of this report is structured as follows:

- **Section 2** details the methodology used for Phase 1 of the research.

- **Section 3** summarises the findings of Phase 1.

- **Section 4** provides key conclusions from the findings.

- **Section 5** sets out recommendations for the scope of Phase 2.

- **Section 6** is the annex and contains a list of additional data sources and evidence on the culture sector identified in Phase 1.

2. Methodology

2.1 This section summarises the approach used for Phase 1 of the evidence review. This approach was agreed with the Welsh Government at project inception and employs a mixed methods approach. Given the absence of research questions for Phase 1, Welsh Government policy officials and external stakeholders were engaged throughout to refine the direction of the Phase 1 analysis and the potential scope for Phase 2. The following steps outline the approach undertaken.

Scoping stage

2.2 An initial scoping stage was undertaken to provide further contextual understanding of the Welsh culture sector. This included reviewing existing policy documents to understand the scope of the subsectors being covered and identify initial topics of interest. During the scoping stage, an initial data map of existing sources relating to the culture sector was provided by the Welsh Government. This formed a starting point of research into available evidence sources.

Scoping interviews

2.3 A total of eight scoping interviews were conducted with Welsh Government officials to provide an initial understanding of the availability and use of data sources from a policy perspective. These interviews were with members of the Welsh Government's Culture Division and Cadw and covered the following policy areas: the new Culture Strategy for Wales; Museums and Collections; Libraries and Archives; Digital; Historic Environment and Heritage (Cadw); the Arts.

2.4 The interviews were semi-structured and covered the following areas of discussion with participants:

- **Key policy priorities covered by the respective policy area**. This was used to obtain an understanding of the types of research questions that each policy area could be interested in and whether there are any gaps between these research questions and the availability of evidence and data.

- **The types of data sources used by policymakers in relation to the culture sector, if any**. This helped to identify additional data sources and those which could be greater priority for policymakers.

- **Key data gaps and limitations in their policy area**. This was used to support the identification of key evidence gaps and limitations of existing sources.

2.5 The scoping interviews allowed the identification and snowballing of data sources to support the analysis. It also enabled an understanding of the potential research questions and data priorities for each policy area within the culture sector, which will ultimately steer the focus of Phase 2.

External stakeholder interviews

2.6 An additional four interviews were arranged with external stakeholders to provide further context on the data collection activities by their respective organisations. All interview participants were provided with a bilingual Privacy Notice and asked for informed consent at the start of the interview. Interview scripts which structured the interviews were agreed with the Welsh Government.

2.7 The discussion focussed on understanding the use and collection of data by participants' respective organisations, to identify whether any of the data gaps identified in the scoping interviews could be addressed with existing data collection activities. As with the scoping interviews, the use of data and key research questions were discussed with participants to identify additional data sources and gaps. Some of the policy priorities raised in the scoping interviews were also discussed with external stakeholders to identify whether data held by respective organisations could support policymaking.

Identification of data sources and search strategy

2.8 In addition to the data sources provided by the Welsh Government and stakeholders, additional data sources were identified through the implementation of a search strategy. The search strategy was based on the following protocol which focusses on identifying sources of quantitative and qualitative data on the culture sector in Wales. In practice, the search was iterative given information learned through the interviews, particularly in relation to policy and research priorities.

2.9 **Review of national datasets and statistics**: The first stream consisted of screening national datasets published by organisations responsible for collecting, aggregating or publishing data and statistics in Wales and the UK. Our review included the 'Statistics and research' provided by gov.wales, the National Survey for Wales, StatsWales, Data Cymru, UK Data Service, the Office for National Statistics (ONS), DCMS Sectors Economic Estimates and Understanding Society (the UK Household Longitudinal Study).

2.10 Search keywords included the five sub-sectors of interest (museums, arts, libraries, archives and heritage), but we allowed for a degree of flexibility, as the boundaries with other related sectors were not clearly defined or consistent. For example, data on the tourism sector often provide insights about visitors to museums, heritage sites or arts venues. The search approach to ONS and DCMS statistics consisted of screening the key datasets (e.g., businesses, GVA, employment) to verify whether data is broken down at a regional level – so as to include Wales – and to the first two digits of the sector industry classification 'SIC' codes (the two families of SIC codes of interest are '90 – Creative, arts and entertainment activities and '91 – Libraries, archives, museums and other cultural activities).

2.11 **Review of evidence from organisations**: In the second stream of the search strategy, we explored the websites of key institutions and organisations in Wales' culture sectors, screening the relevance of their research publications. The organisations we included in the search included the following:

- **For museums:** the National Museums of Wales, the Federation of Museums & Art Galleries of Wales and the Association of Independent Museums.

- **For the arts**: the Arts Council of Wales and Creative Wales. Although Creative Wales is not included in the New Culture Strategy for Wales, it is recognised that there could be some evidence from Creative Wales that is relevant to the strategy and so has been included in the search. Only evidence relevant to the strategy will be included.

- **For libraries**: the National Library of Wales and CILIP (the UK's library and information association).

- **For archives**: Archive Wales and the Archives & Records Association (ARA)

- **For heritage**: Cadw, the National Trust and Heritage Fund and the Royal Commission on the Ancient and Historical Monuments of Wales.

2.12 **General search for evidence**: Lastly, we did a series of searches using search engines to identify other available data and evidence not included in the previous two streams of search. The table below illustrates the combinations of keywords that have been used to run the searches. Every combination of keywords in the four categories was put into the search engine and the main results were manually screened.

Keywords	Search terms
Keyword 1 – Key areas	museums, arts, libraries, archives, heritage
Keyword 2 – Main topics	visitors, attendance, audience, users, engagement, participation, industry, sector, organisations, enterprises, workforce, skills, employees
Keyword 3 – Research target	data, report, research, survey, questionnaire, study, statistics, review, findings, publications
Keyword 4 – Geographical scope	Wales, UK

2.13 The evidence identified through the interviews and the three search strategies were filtered according to two main dimensions of our inclusion/exclusion criteria:

- **Primary data provision**. Our scoping search was aimed at gathering evidence sources that provide new information about the culture sector in Wales, collected from (or about) the organisations and workers in the sector and their visitors, users and audiences. Therefore, we excluded all publications that did not include primary data collection or aggregation of otherwise inaccessible data. This included qualitative reports; research publications that analysed existing datasets rather than providing new information; and reports which could be

accessed only through a paywall (however some paid-for sources were briefly included in the findings where they were provided by the Welsh Government).

- **Geographical scope**. Our geographical scope is restricted to Wales, however, we included some UK-wide sources which may include the collection of Wales-specific data (even if not necessarily reporting to this level), which can therefore be potentially disaggregated.

Review and assessment of data sources

2.14   Data and evidence sources identified through the information collection activities described above were collated into a Research Extraction Sheet (RES) which logged a summary of each data source, including subset of the culture sector covered, target population, key indicators and topics, frequency of data collection and last date of publication. A high-level assessment of the relevance of the data sources against the scope of the project was undertaken. For example, we flagged (i) publications that do not report results specific to Wales but only aggregated for the UK as a whole or for England and Wales, (ii) when results are aggregated according to categories that are not perfectly aligned with the five sub-sectors of interest for this research, and (iii) sources that are totally or partially behind a paywall (any evidence behind a paywall may not be captured in the analysis in Phase 2 of the project if not accessible for the research). In total, 39 sources were identified, 13 of which were included in the initial data mapping provided by the Welsh Government.

3.   Findings

3.1   This section details the findings from Phase 1, following the implementation of the methodology described in the previous section.

Findings from the interviews

3.2   The core outcome of the interviews conducted with Welsh Government officials and key external stakeholders was the identification of data and evidence sources on the culture sector in Wales. We discussed with the interviewees what data their government divisions or organisations collect and/or purchase, what monitoring reports (if any) they produce, and what research projects (if any) are currently being carried out or have recently been undertaken. The data and evidence identified through these interviews that are publicly available (or that have been shared with us by the interviewees) have been included in the list of data and evidence sources in the Annex.

3.3   Through the interviews we also collected information about the main policy priorities in each sub-sector of interest, as well as key research topics and questions the interviewees would wish to explore, which helps to understand which are the most pressing gaps in currently available evidence. An overview of key discussion points is provided in the table below.

Theme	Key discussion points
Museums and collections	**Policy priorities**: • The creation of a football museum for Wales. • Ensuring that the history and culture of black, Asian and minority ethnic people are represented. • Supporting the development of local museums. • Expanding the local museum workforce, ensuring greater ethnic minority representation and diversity, also by helping them recruit volunteers. • Improving the digital skills of the workforce. • Increasing the number and diversity of visitors. • Expanding the collections and ensuring ethnic minority representation and diversity within the collections.

Theme	Key discussion points

- Supporting and contributing to a series of national strategic objectives, such as improving health and well-being across the population, sustainability, and decarbonisation, supporting the Anti-racist Wales Action Plan and the LGBTQ+ Action Plan for Wales.

Key research topics/questions to explore:

- Impact of visiting museums and participating in activities within museums on health and well-being.
- Economic and social returns of investing in museums.
- Impact and risks connected to limited funding on areas like expansion and maintenance of collections, and dimension and quality of the workforce.
- Compare the performance of Welsh local museums with local museum sectors outside Wales.

Libraries and Archives

Policy priorities:

- For archives, the main policy priorities concern the development of the capacity to store and manage digital content and to provide access to remote users.
- For libraries, since they are about to implement an integrated digital library management system for all of Wales's public libraries, the main policy priority is developing the capacity to collect and analyse the data that will be generated through the new system.

Key research topics/questions to explore:

- Benchmarking with services provided by libraries and archives outside Wales.
- Trends on user demand and needs, and user satisfaction.
- The status of archive collections in Wales (what are archives collecting, which collections are catalogued, to what extent collections are digitised, how accessible they are, etc.).
- Good practices and business cases for digitisation of libraries and archives.

Heritage

Policy priorities:

- Improving social outcomes (e.g., community engagement, diversity of visitors and workforce, inclusivity, etc.).
- Financial sustainability of heritage operations.
- Contribution of heritage sites to local economies and broader economic benefits at the national level.

Theme	Key discussion points
	- Environment and climate change (considering both the impact of heritage operations on the environment and the impact of climate change on heritage conservation). **Key research topics/questions to explore:** - Visitor profiles across the different heritage sites and the main barriers to visiting heritage sites for different population groups. - Impact of heritage sites on local economies. - Broader economic benefits of heritage conservation at the national level. - The evolution of places' names in relation to the conservation of the Welsh language. - Impacts of climate change on heritage sites. - Links between visits to heritage sites and well-being. - How the heritage can support the Anti-racist Wales Action Plan.
The Arts	**Policy priorities:** - Promoting creativity. - Widening engagement by reaching those communities that the arts have consistently failed to engage. - Promoting Welsh language by maximising opportunities for the organisations in the sector to learn, use and share Welsh language and culture. - Taking ownership of the climate and nature emergencies, through action that is socially, environmentally and ethically sustainable. - Ensuring that there are pathways that allow people from all backgrounds to develop creativity, skills and leadership. - Promoting transformation by seizing new opportunities, taking risks and being responsive to change. **Key research topics:** - Digitisation of the organisations in the sector and digital skills of the workforce. - In general, how to work towards the policy priorities.
Digital development	**Policy priorities:** - Sharing data and information across organisations in the culture sector.

Theme	Key discussion points
	• Assessing and improving the digital skills of the workforce.
	• Creating a unique access point to the digital collections of museums, libraries and archives, including the pooling of metadata.
	• Harmonising protocols for digitising and storing digital assets across organisations in the sector.
	• Using digital media to promote Welsh culture worldwide.
	• Collecting more information about data governance from organisations receiving public funding to develop digital content.
	Key research topics/questions to explore:
	• What are the main digital skills gaps in the workforce, and how should the culture sector workforce of the future look?
	• How can digital support decarbonisation?
	• What will audience demand look like in the future and what is needed to adapt the cultural offer?

Identification and assessment of data sources

3.4   Overall, 39 data and evidence sources were identified, 13 of which were included in the initial data mapping provided by the Welsh Government at the start of the review. A list of these data sources is in the Annex.

3.5   Despite the difference in the additional data sources found compared to that included in the initial data mapping provided by Welsh Government, the latter provided a useful starting point for the review and detailed several data sources that would be particularly important for policymakers.

3.6   There are four main areas of scope which resulted in the identification of the additional sources identified through the review, in addition to the initial Welsh Government mapping. Firstly, the data mapping focussed on data sources produced by a handful of organisations, namely Visit Wales, Welsh Government, CIPFA, Arts Council of Wales, Association of Leading Visitor Attractions and the UK Government Department for Culture, Media and Sport (DCMS). The data review

expanded the search beyond these organisations and so we were able to identify data produced from other potentially less well-known areas.

3.7 Secondly, the initial data mapping did not include data on the heritage sector. The interviews were particularly helpful in identifying relevant data and evidence in this area. Thirdly, the interviews supported identification of data associated with additional areas of interest and research questions which may not have been considered in the initial mapping. The stakeholder engagement also helped to identify data sources which were potentially less well-known but could still provide incremental value to the data map. Lastly, the review of the mapping found some data sources which were deemed not relevant or useful, as it does not include data from Welsh residents or analysis of Welsh venues.

4.   Conclusion from Phase 1

4.1   Our findings suggest evidence and data on the culture sector in Wales exists, however the availability and quality of data varies across each of the culture subsectors and may not necessarily be updated periodically in the future. The discrepancy in availability and quality of evidence across the subsectors partly reflects the different remits of relevant data collecting institutions and the coverage of activities they oversee. Further, data and statistics pertaining to the cultural sector in the UK sometimes lack regional disaggregation, preventing the observation of Wales-specific metrics. This presents challenges in terms of the ability of policymakers to easily understand the availability of data and evidence available.

4.2   As detailed below, the review identifies three potential uses of the evidence base for the new Culture Strategy for Wales and how this motivates key recommendations for the scope of Phase 2 of the review:

Policy and strategy development

4.3   The findings from Phase 1 highlight the importance of evidence on the size, composition, and impact of the culture sector for the development of the new Culture Strategy for Wales. The interviews found that such evidence would likely be critical to helping policymakers shape future policy direction in each of the culture subsectors, with some of these areas undergoing significant change which will require an evidence-based approach. As such, the development of the new Culture Strategy for Wales will require leveraging the evidence base, which itself will require understanding the availability of such evidence. This suggests **Phase 2 should include a mapping of data against policy priorities,** for each of the culture subsectors, to support evidence-based policymaking.

Future research priorities

4.4   The interviews also suggested the importance of being able to identify any gaps or limitations in the evidence base, as this will determine future research activities of the Welsh Government to ultimately support policymaking. It is therefore important

that **Phase 2 should include the identification of data gaps** and the feasibility of these being addressed with existing data collection activities.

Monitoring and evaluation

4.5   At the conclusion of Phase 1, the new Culture Strategy for Wales is in development. Although details of the strategy are currently being determined, it is important that the Welsh Government considers the plan for monitoring and evaluation of the strategy's impact as part of this evidence review of the culture sector. This will ensure that any future monitoring and evaluation plan uses known data that will be adequately available for future monitoring and evaluation activities, as well as defining what success of the new Culture Strategy for Wales looks like. Therefore, **Phase 2 should prioritise key indicators and continue to map these across each of the culture subsectors**. These indicators will be those considered the most important for policymaking and would likely feature in the strategy's monitoring and evaluation.

5. Recommendations for Phase 2

5.1   The findings from Phase 1 motivate three objectives of Phase 2:

I.   Undertake a review and mapping of data and evidence against key topics of interest to support evidence-based policymaking.

II.   Identify key gaps and limitations in the existing evidence base to support the prioritisation and planning of future research activities.

III.   Provide a statistical overview of the culture sector and subsectors across key topics of interest.

Proposed research questions

5.2   Based on the objectives described above, the following two deliverables and associated research questions are proposed for Phase 2:

5.3   ***Deliverable 1: Data mapping against priority indicators and policy priorities***, seeking to answer the following questions:

1. For each culture subsector, what metrics are available for the following:

- Priority indicators, for example:

  - Users / visitors / attendants

  - Workforce

  - Organisations

- Policy priorities, for example:

  - Environmental impact and decarbonisation

  - Digitisation and digital skills

  - Welsh language

  - Impacts on well-being

  - Contribution to local economies

  - Promotion of diversity/inclusion and engagement and participation of protected characteristics groups

- Representation of Black, Asian and Minority Ethnic people

- Rural proofing

2. What gaps exist? Which indicators are currently not measured?

3. What are the main limitations of existing data and evidence sources?

The precise indicators (e.g. 'visitors) and associated metrics (e.g. 'number or percentage of visitors) investigated will need to be prioritised and agreed with the Welsh Government, as well as the policy priorities.

5.4   ***Deliverable 2: Analysis of existing data***, based on prioritised metrics and statistics of interest. This could include the development of a statistical summary of the culture sector. We envisage that this report will summarise key statistics such as the following, subject to agreement with the Welsh Government and data availability.

- The number of users or visitors in the culture sector, by subsector, capturing key demographics where possible.

- The number of workers in the culture sector, by subsector and worker grade where possible.

- The growth of the culture sector, for example by users and workers.

- The number and geographical distribution of organisations and institutions in the sector

- The size of the culture sector in terms of gross value added, expenditure or revenue.

6. Annex: Data and evidence sources

Internal reference number	Title	Organisation	5 key areas of interest covered	Last (or only) year covered
1	Wales Visitor Survey	Prepared by Beaufort Research for Visit Wales	Museums Heritage	2019
2	Wales Visitor Survey - Focus on museums	Prepared by Beaufort Research for WG Museums, Archives and Libraries Division	Museums	2019
3	National Survey for Wales	Welsh Government	Museums Arts Libraries Archives Heritage	2018-19
4	Spotlite/Spotlight on Museums	Welsh Government	Museums	2015
5	Archive Services Statistics	Produced by CIPFA for the WG Culture Division (paid for subscription)	Archives	2017-18
6	Public Library Statistics	Produced by CIPFA for the WG Culture Division (paid for subscription)	Libraries	2019-20
7	Welsh Public Library Standards	Welsh Government	Libraries	2019-20
8	Wales Omnibus Survey – Adult engagement in the Arts	Arts Council of Wales	Arts	2020
9	Children's Omnibus Survey	Arts Council of Wales	Arts	2019
10	Arts Portfolio Wales Survey	Arts Council of Wales	Arts	2019-20
11	Survey of Visitors to UK Archives (CIPFA)	Archive and Records Association (UK & Ireland)	Archives	2018
12	Distance Enquiry Services Surveys (CIFPA)	Archive and Records Association (UK & Ireland)	Archives	2021
13	ALVA attraction Recovery Tracker	Association of Leading Visitor Attractions (ALVA)	Museums Heritage	2021
14	DCMS Sector Economic Estimates	DCMS	Museums Arts Libraries Archives Heritage	2022
15	DCMS Economic Estimates: Employment, Welsh Creative Wales Creative Industries, 2019 and 2020	DCMS	Arts	2019-20
16	Cadw Peak Season Visitor Survey	Cadw	Heritage	2022

17	Barriers to visiting heritage sites	Cadw	Heritage	2022
18	Neath Abbey Community Research	Cadw	Heritage	2023
19	Summer Visitor Survey	Cadw	Heritage	2018
20	Shoulder Season Visitor Survey	Cadw	Heritage	2018
21	Visitor Satisfaction and Dwell Time	Cadw	Heritage	2014
22	Valuing the Welsh Historic Environment	Cadw	Heritage	2010
23	Widening Engagement Report	Arts Council of Wales and National Museum Wales	Museums Arts	2021
24	Findings and recommendations report	Arts Council of Wales and National Museum Wales	Museums Arts	2021
25	Welsh Arts Anti Racist Union Report	Arts Council of Wales and National Museum Wales	Museums Arts	2022
26	Strategic Equality Plan Annual Report	Arts Council of Wales and National Museum Wales	Arts	2020-21
27	Tailored review of the National Library of Wales	Welsh Government	Libraries	2020
28	AIM Economic Impact Study and Toolkit (2019)	Association of Independent Museums	Museums	2019
29	Creative Wales Industry Survey	Creative Wales	Arts	2022
30	Audience Finder Data	The Audience Agency	Museums Arts Heritage	n/a
31	Seeking certainty: A snap museums survey	Association of Independent Museums	Museums	2022
32	UK Heritage Pulse: Survey 1	Heritage Fund	Heritage	2022
33	UK Heritage Pulse: Survey 2	Heritage Fund	Heritage	2022
34	Screen Work 2020: Future skills and innovation for the Screen Sector in the Cardiff Capital Region	University of South Wales and Clwstwr	Arts	2020
35	Screen Survey Wales 2021	University of South Wales and Creative Wales	Arts	2021
36	The size and composition of the creative industries in Wales	Clwstwr	Arts	2019
37	Understanding Society - Main Survey	Understanding Society	Museums Arts Libraries Archives Heritage	2013-14

| 38 | Understanding Society - Youth | Understanding Society | Museums
Libraries
Heritage
Arts | 2020-21 |
| 39 | Creative, cultural and digital industries | ONS | Museums
Arts
Libraries
Archives
Heritage | 2021 |

Links to the sources

1. Wales Visitor Survey: 2019
2. Wales visitor survey 2019: visitors to museums and areas of historic interest
3. National Survey for Wales: culture and Welsh language
4. Spotlite on Museums 2016
5. CIPFA - Archive Services Statistics 2017/18 Actuals
6. CIPFA - Public Library Statistics 2020/21 Estimates and 2019/20 Actuals
7. Public library service annual reports 2017 to 2018
8. Arts Council of Wales - Annual Surveys
9. Arts Council of Wales - Annual Surveys
10. Arts Council of Wales - Arts Portfolio Wales Survey
11. Archives and Records Association - Sector Surveys & Reports
12. Archives and Records Association - Sector Surveys & Reports
13. Association of Leading Visitor Attractions (ALVA) - Resources
14. DCMS Sectors Economic Estimates
15. Ad hoc statistical analysis: 2022/23 Quarter 1
16. Cadw Peak Season Visitor Survey: 2022
17. Barriers to visiting heritage sites: 2022
18. Neath Abbey community research: 2022
19. Cadw - Research
20. Cadw - Visitor Research
21. Cadw - Visitor Research
22. Cadw - Valuing the Welsh Historic Environment
23. Widening Engagement Report - Richie Turner Associates
24. Recognition empowering people - Findings and recommendations report
25. Welsh Arts Anti Racist Union Report
26. Strategic Equality Plan Annual Report 2020-2021
27. Tailored review of the National Library of Wales

28. [AIM Report and Toolkit](#)

29. [Creative Wales Industry Survey: 2022](#)

30. [The Audience Agency](#)

31. [AIM - Seeking Certainty](#)

32. [Heritage Fund](#)

33. [Heritage Fund](#)

34. [Clwstwr - Screen Work 2020](#)

35. [Screen Survey Wales 2021](#)

36. [Clwstwr - Report update: The size and composition of the Creative Industries in Wales in 2019](#)

37. [Understanding Society](#)

38. [Understanding Society](#)

39. [ONS - Creative, cultural and digital industries](#)