

Dadansoddi ar gyfer Polisi



Analysis for Policy



Llywodraeth Cymru  
Welsh Government

SOCIAL RESEARCH NUMBER:

101/2023

PUBLICATION DATE:

31/10/2023

# Review of the Culture Sector Evidence Base in Wales

## Phase 2 report

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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Title: Review of the Culture Sector Evidence Base in Wales  
Subtitle: Phase 2 report

Report by:



Full Research Report: Alma Economics (2023). *Review of the Culture Sector Evidence Base in Wales - Phase 2 report*. Cardiff: Welsh Government, GSR report number 101/2023  
Available at: <https://www.gov.wales/review-culture-sector-evidence-base-wales>

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

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# 1. Introduction

## Background

- 1.1 The Co-Operation Agreement<sup>1</sup> and updated Programme for Government<sup>2</sup> 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<sup>3</sup>.
- 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 includes 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 has been structured across two phases. The first phase of work ('Phase 1') undertook an initial review of existing data and evidence on the culture sector and respective subsectors. It also included engagement with Welsh Government policy officials and stakeholders to understand key research questions that should be addressed in the second phase of work ('Phase 2'), specifically relating to the scope and structure of the review of data and evidence.

## Scope of this report

- 1.4 Phase 1 concluded in April 2023 and found that while data on the culture sector exists, it is occasionally incomplete, reported inconsistently, not collected frequently enough and does not cover all the topics which could be helpful to policymakers. In

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<sup>1</sup> [The Co-operation Agreement | GOV.WALES](#)

<sup>2</sup> [Programme for government: update | GOV.WALES](#)

<sup>3</sup> [The Well-being of Future Generations | GOV.WALES](#)

conclusion, Phase 1 identified three recommendations for the scope of Phase 2 of the review, detailed as follows:

**1. Undertake a review and mapping of data and evidence** against key topics of interest to support evidence-based policymaking. This is based on the findings that policymakers wanted to have a better understanding of the size and composition of the culture sector and subsectors, particularly in terms of:

- Users / visitors / attendants
- Workforce
- Organisations

The contribution of the culture sector and subsectors to wider Welsh Government policy priorities should also be explored, including:

- Environmental impact and decarbonisation
- Digitisation and digital skills
- Welsh language
- Impacts on wellbeing
- 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. Identify key data and evidence gaps** across key topics of interest listed above, to support the prioritisation and planning of future research activities.

**3. Provide a statistical overview** of the culture sector and subsectors across key topics of interest listed above.

1.5 This report details the findings of Phase 2 in relation to the above recommendations. This report specifically discusses the outputs of the second and third recommendations by providing a statistical overview of the culture sector and subsectors and identifying key data and evidence gaps. These outputs are based on the mapping of the evidence base, as outlined in the first recommendation.

1.6 The remainder of this report is structured as follows. Sections 3 to 6 provide a statistical overview of the culture sector in each of the topics of interest identified by Phase 1. Specifically, it is structured as:

- **Section 2:** Statistical overview of the culture sector's workforce.
- **Section 3:** Statistical overview of the culture sector in terms of its visitors, users and attendants.
- **Section 4:** Statistical overview of the culture sector's organisations.
- **Section 5:** Statistical overview of the culture sector against key policy priorities.
- **Section 7:** Key gaps and limitations of available data and evidence.



## 2. Workforce

2.1 This section summarises the availability of evidence on the culture sector's workforce in Wales.

2.2 The Department for Culture, Media and Sport (DCMS) periodically releases workforce statistics on the sectors falling under its remit, as part of the DCMS Sectors Economic Estimate series<sup>4</sup>. Employment data for Wales is available for the five subsectors within the scope of this review, which are identified by the following standard industrial classification (SIC07) codes<sup>5</sup>:

**Table 2.1: DCMS cultural sectors SIC07 codes.**

DCMS cultural sectors	SIC07 code	SIC07 code description
Arts	9001	Performing arts
	9002	Support activities to performing arts
	9003	Artistic creation
	9004	Operation of arts facilities
Library and archives <sup>6</sup>	9101	Library and archive activities
Museums and galleries	9102	Museum activities
Operation of historical sites and similar visitor attractions	9103	Operation of historical sites and similar visitor attractions

Source: DCMS Sector Economic Estimates

2.3 Employment is measured by the number of filled jobs, including both employed and self-employed positions. The subsector which an organisation is classified as is determined by its primary economic activity. Therefore, all employees working for that organisation will be classified as belonging to that subsector, regardless of their occupation. For instance, an accountant in a performing arts company would be

<sup>4</sup> Available at: [DCMS Sectors Economic Estimates - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/collections/dcms-sectors-economic-estimates)

<sup>5</sup> SIC07 codes, or Standard Industrial Classification 2007 codes, are a hierarchical system used in the UK to classify businesses based on their primary economic activity. They provide a standardized way to categorize and compare companies across different sectors, facilitating data analysis and reporting.

<sup>6</sup> SIC07 codes consist of a five-digit numerical identifier that corresponds to a specific subsector. However, the level of granularity of DCMS statistics is limited to the fourth digit. At this level of granularity, the library and archives subsectors are aggregated. The provided figures represent therefore the combined total of both subsectors.

counted as employed in the arts sector, despite the occupation not being strictly related to artistic production.

2.4 DCMS employment data is sourced from the Labour Force Survey (LFS), which feeds into the Annual Population Survey (APS). LFS and APS data rely on self-reporting by individuals, which allows to include both primary and secondary occupations, unlike employment data derived from business returns. This is particularly valuable for capturing the contribution of individuals engaged in part-time jobs, freelance work, or other secondary employment alongside their main occupation.

2.5 The table below reports the number of filled jobs in each DCMS cultural sector over the last 11 years.

**Table 2.2: Number of filled jobs by cultural subsector<sup>7</sup>.**

Year	Arts	Museums and galleries	Library and archives	Operation of historical sites and similar visitor attractions
2022 <sup>8</sup>	10,506	1,479	2,583	c
2021	9,253	715	1,975	c
2020	8,069	2,073	3,609	c
2019	9,910	1,619	1,950	c
2018	11,575	1,774	1,886	356
2017	8,077	1,948	1,922	507
2016	8,630	1,932	1,808	c
2015	11,429	1,589	2,079	c
2014	7,633	1,664	2,137	605
2013	9,485	1,879	2,961	226
2012	6,736	2,649	2,358	495
2011	8,928	1,537	c	c

Source: DCMS Sector Economic Estimates

<sup>7</sup> The shorthand 'c' denotes data that has been suppressed to prevent disclosure of respondent information.

<sup>8</sup> The most recent available data, labelled as '2022', actually pertains to the timeframe spanning from October 2021 to September 2022, whereas for all the other years in the table, data cover the period from January to December.

- 2.6 According to the latest DCMS employment data, over 14,500 workers were employed in the arts, museum, library and archive sectors in 2022. Over the last four years, employment figures for the heritage sector have been suppressed to avoid disclosure of relevant information due to low counts. The latest available data recorded 356 occupied positions in the heritage sector in 2018.<sup>9</sup> As shown in the table above, there is no discernible trend in total employment in the culture sector over the past few years, with it remaining relatively stable. The Arts sector is the slight exception, which has seen fluctuations in its workforce in terms of both growth and decline year and year.
- 2.7 According to the DCMS methodological note<sup>10</sup>, there are significant weaknesses with the industry breakdowns, as LFS and APS data are based on self-reporting of individuals, rather than on information from business returns. Additionally, it's important to note that the employment statistics provided by DCMS do not include the volunteer workforce, which represents a significant portion of the overall workforce within the cultural sectors, as will be demonstrated in the following sections on the museum and library workforce.
- 2.8 Additional information on the workforce employed in the cultural sectors in scope can be found in a series of sector-specific publications, which will be described in the following sections. Due to variations in indicators, data collection methodologies, and reporting periods, these publications do not provide consistent information across the five subsectors in scope. Therefore, making direct comparisons between subsectors using these data is not recommended. Furthermore, data from these publications is often collected from a specific subset of organisations / employers, which may not fully represent the entirety of a given subsector. Nonetheless, these publications do provide valuable insights that contribute to a comprehensive understanding of the workforce within the cultural sectors.

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<sup>9</sup> The [methodological note](#) accompanying the employment statistical release specifies that, due to the limitations associated with SIC07 codes, the published estimates are likely to underestimate the employment figure for the heritage sector.

<sup>10</sup> Available at: [DCMS Sector Economic Estimates Methodology - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/614447/DCMS_Sector_Economic_Estimates_Methodology.pdf)

## Museums

- 2.9 The most comprehensive data on the museum workforce in Wales is collected by Spotlight on Museums<sup>11</sup>, a periodical survey that was first run in 2006. The last edition of the report was produced in 2020 by The Federation of Museums and Art Galleries of Wales and Cardiff University and included data from the 2018/19 fiscal year. Previous releases were published in 2015, 2011, 2006 and 2002.
- 2.10 Data in the report is based on a survey of accredited museums. The data therefore relies on who responds to the survey and therefore would not capture the entire museums sector, but nevertheless it offers a reasonably representative perspective. In 2020, 85 museums responded to the survey, representing 53% of the approximately 160 organisations that are defined as museums. Of the 85 respondents, 83 are accredited museums, 78% of the 106 accredited museums in Wales. Of the 160 museums, 40 do not meet the ‘working towards accreditation’ criteria and have never participated in the Spotlight survey.
- 2.11 The table below provides a breakdown of paid and volunteer workforce across the four Welsh museum categories.

**Table 2.3: Museum volunteers and employed staff by type of museum, 2018/19.**

Museum type	Volunteers	Volunteer hours	Employed	Employed FTE	Total staff	Percentage Volunteer
Amgueddfa Cymru	1,134	29,507	838	543.0	1,972	57.50%
Independent museums	1,112	161,198	160	77.2	1,272	87.40%
Local authority	434	34,649	263	140.4	697	62.20%
National Trust	1,555	179,322	345	231.1	1,900	81.80%
Total	4,235	404,676	1,606	991.7	5,841	72.50%

Source: Spotlight on Museums 2020

- 2.12 According to the findings of the Spotlight survey, museums employed a total of 5,841 individuals in 2018/19. Notably, the majority of these workers – 72.5% of the

<sup>11</sup> The 2020 edition is available at: [Spotlight on museums 2020 | GOV.WALES](https://gov.wales/spotlight-on-museums-2020)

entire workforce – were volunteers. This figure translates to 4,235 individuals contributing 404,676 volunteer hours. In terms of paid employment, the survey revealed that 991.68 full-time equivalent (FTE) positions were filled, which is 38% lower than the total employed workforce figure (1,606 workers). These numbers suggest a significant proportion of workers being employed part-time.

- 2.13 The table below presents the combined totals of volunteers and employed staff reported in the last three editions of the report. It takes into account both the overall number of responses received, which amounted to 80 in 2015 (covering the fiscal year 2013/14) and 106 in 2011 (covering the fiscal year 2010), as well as the responses provided by the 'core group' – the 51 museums that consistently participated in the survey each year.

**Table 2.4: Museum volunteers and employed staff over the years.**

	All museums		Core group	
	Volunteers	Employed staff	Volunteers	Employed Staff
2010	2,118	1,317	792	962
2013/14	2,300	1,196	1,409	924
2018/19	4,235	1,606	2,159	1,100

Source: Spotlight on Museums 2020

- 2.14 Considering the core group of respondents only, the workforce exhibited a growth of 39.7% between the two most recent editions of the survey, driven by a 53.2% increase in the number of volunteers, which was already 78.0% larger in 2013/14 than in the 2011 edition of the report.

### **Libraries**

- 2.15 The Welsh Public Library Standards 2017-2020<sup>12</sup> provide a framework for evaluating and improving the quality and effectiveness of public library services in Wales. Under these standards, each local authority in Wales is required to submit an annual report that covers a wide range of aspects related to library services. The report includes data and indicators that help measure the performance and impact of public libraries in areas such as usage statistics, visitor numbers, book loans,

<sup>12</sup> Available at: [Measuring the public library service: our standards | GOV.WALES](https://gov.wales/measuring-the-public-library-service-our-standards)

digital engagement, and outreach programmes. In addition to quantitative data, the annual reports also include case studies, which highlight specific projects, initiatives, or success stories from individual libraries within each local authority. The purpose of these reports is to provide a comprehensive overview of library activities and their impact on the communities they serve.

- 2.16 The annual reports incorporate information regarding the library workforce, encompassing staffing levels, staff qualifications and volunteers, as described in the following paragraphs. The most updated workforce indicators are from 2019/20<sup>13</sup>, as the closure of public libraries and the disruption to services due to the Covid-19 pandemic made it impractical to continue with the usual annual reporting exercise against the Welsh Public Library Standards for 2020/21. Instead, a revised data collection exercise was implemented<sup>14</sup>, with a greater emphasis on capturing qualitative information and the experience of library users. The information presented in the following paragraphs refers to the annual assessment reports of 2019/20 and prior years.
- 2.17 The annual assessment reports do not provide information about the number of employees. Local authorities are only required to report whether they achieved total staffing level for the library service of 3.6 full time equivalent (FTE) per 10,000 resident population, excluding staff who do not work directly in the service provision (e.g., cleaners).
- 2.18 Local authorities are also required to report on two quality indicators about staffing qualifications. The first metric assesses whether the total number of staff (FTE) holding recognised qualifications in librarianship, information science or information management per 10,000 resident population reaches the threshold of 0.65. The second metric focuses on the designated operational manager of the library service, requiring that they either possess recognised qualifications in librarianship, information science, or information management, or have completed relevant library management training within the past three years. The table below summarises the

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<sup>13</sup> The 2019/20 Public Library Services Annual Reports produced by each local authority are available at: [Public library service annual reports 2019 to 2020 | GOV.WALES](#).

<sup>14</sup> Available at: [Welsh libraries report: 2020 to 2021 | GOV.WALES](#)

2019/20 results for the three staffing levels and qualifications metrics across the 22 local authorities.

**Table 2.5: Library staffing level and qualification indicators, 2019/20.**

<b>Metric</b>	<b>Local authorities meeting the quality indicator in 2019/20</b>
Staff levels per capita	4.5% (1 out of 22)
Qualified staff per capita	18.2% (4 out of 22)
Head of service qualification/training	95.5% (21 out of 22)

Source: Public Library Service Annual Reports 2019/20

- 2.19 The table shows that only one local authority met the staffing level requirement, employing 3.6 FTE for 10,000 population. The other two quality criteria on staffing qualifications were met respectively by 4 and 21 out of 22 local authorities. These indicators are also available for 2018/19<sup>15</sup> and 2017/18<sup>16</sup>.
- 2.20 The most recent data on the number of volunteers and volunteer hours are derived from the 2018/19 Public Library Service Annual Reports. These figures were not collected for the subsequent reporting year of 2019/20 due to the disruptions caused by the Covid-19 pandemic, which significantly impacted library activities. In the 2018/19 reports, a total of 1,058 volunteers were documented, contributing a collective 45,412 hours of volunteer service.
- 2.21 Additional information on the library workforce can be found in a study of the UK information workforce, commissioned by the Chartered Institute of Library and Information Professionals (CILIP) and the Archives and Records Association (ARA) in 2014, and completed in 2015<sup>17</sup>. The study is the first UK-wide mapping of the information workforce, which includes library, archives, records, information management and knowledge management workers. The report findings are based

<sup>15</sup> The 2018/19 Public Library Services Annual Reports produced by each local authority are available at: [Public library service annual reports 2018 to 2019 | GOV.WALES](#)

<sup>16</sup> The 2017/18 Public Library Services Annual Reports produced by each local authority are available at: [Public library service annual reports 2017 to 2018 | GOV.WALES](#)

<sup>17</sup> The study is available as 'Workforce report 2015' at: [A range of resources for the record keeping sector — Archives & Records Association](#)

on a data set of 10,628 survey responses, a statistically significant sample of the estimated total information workforce, amounting to over 86 thousand individuals.

2.22 The survey sample includes 395 individuals who work in libraries in Wales. The report offers only two sets of statistics that can be analysed both at the regional and sector levels, thus providing data specific to the library workforce in Wales. These are the distribution of workers across pay bands and across job statuses, as presented in the two tables below.

2.23 Table 1.6 shows the distribution of workers across pay bands. It includes only respondents who work 22 hours per week or more, for a total of 301 respondents.

**Table 2.6: Distribution of library workers across pay bands, 2014/15**

<b>Pay</b>	<b>Percentage of workers</b>
Less than £15,001	8.3%
£15,001 to £17,500	6.6%
£17,501 to £20,000	7.6%
£20,001 to £22,500	12.3%
£22,501 to £25,000	9.3%
£25,001 to £30,000	15.6%
£30,001 to £35,000	14.3%
£35,001 to £40,000	10.6%
£40,001 to £50,000	12.0%
£50,001 to £80,000	3.0%
£80,001 or more	0.3%

Source: A study of the UK information workforce

2.24 The pay band data reveals a that a significant proportion (22.5%) of workers earn below £20,000, indicating a considerable share of employees with relatively low incomes. Above 40% of the workers earn between £25,000 and £40,000, whereas 15% of the workforce lies above £40,000. The median salary lies between £25,000 and £30,000.



2.25 Table 1.7 displays the distribution of workers across 8 job statuses. It shows that the majority of respondents are frontline workers (38.5%), followed by a 20.8% of first level management workers and a 19.2% of middle management workers.

**Table 2.7: Distribution of library workers across job statuses, 2014/15**

<b>Job status</b>	<b>Percentage of workers</b>
Senior management	8.6%
Middle management	19.2%
First level management	20.8%
Supervisory	13.7%
Front line	38.5%
Independent consultant	0.8%
Volunteer	0.8%
Other	6.8%

Source: A study of the UK information workforce

2.26 A new edition of the survey has been conducted between August and September 2022, and the outcomes have been compiled into the Study of UK's information workforce 2023 report<sup>18</sup>. However, the report presents results either categorised by country or by sector, thus not allowing to observe any data specific to the library sector in Wales.

### **Archives**

2.27 The study of the UK information workforce commissioned by CILIP and ARA is the sole source of publicly available data on the archives workforce in Wales. Table 1.8 shows the distribution of workers across pay bands, drawing from a sample of 64 archive workers.

<sup>18</sup> The study is available as 'Workforce Survey 2022' at: [A range of resources for the record keeping sector — Archives & Records Association](#)

**Table 2.8: Distribution of archives workers across pay bands, 2014/15**

<b>Pay</b>	<b>Percentage of workers</b>
Less than £15,001	6.3%
£15,001 to £17,500	1.6%
£17,501 to £20,000	4.7%
£20,001 to £22,500	10.9%
£22,501 to £25,000	10.9%
£25,001 to £30,000	31.3%
£30,001 to £35,000	15.6%
£35,001 to £40,000	7.8%
£40,001 to £50,000	6.3%
£50,001 to £80,000	4.7%
£80,001 or more	0.0%

Source: A study of the UK information workforce

- 2.28 The distribution of salaries among archives workers reveals a concentration around the central pay bands, with only 12.6% of workers earning below £20,000 and 11.0% above £40,000. The median income falls between £25,000 and £30,000, and approximately 30% of workers are in this pay range.
- 2.29 Table 1.9 shows the distribution of workers across job statuses, which is derived from a sample of 99 respondents. Similar to the library workforce, a significant majority of respondents are employed in frontline positions (31.3%). It is worth noting that volunteers make up a substantial share, comprising 15.2% of the total workforce.

**Table 2.9: Distribution of archives workers across job statuses, 2014/15.**

<b>Job status</b>	<b>Percentage of workers</b>
Senior management	6.1%
Middle management	18.2%
First level management	15.2%
Supervisory	11.1%
Front line	31.3%
Independent consultant	4.0%
Volunteer	15.2%
Other	7.1%

Source: A study of the UK information workforce

- 2.30 As mentioned in the previous section on the library sector, a new edition of the survey has been conducted in 2022, but the report where survey results are presented does not allow to observe any data specific to the archive sector in Wales, as all outcomes are shown either by country or by sector.

### **Heritage**

- 2.31 Cadw is the Welsh Government historic environment service and looks after more than 130 listed buildings and scheduled monuments which are open to the public. According to their website, approximately 250 individuals are currently employed directly by the organisation, spanning various occupations across six operational branches<sup>19</sup>.
- 2.32 To gain a broader perspective on the whole Welsh historic environment – which encompasses not only listed buildings and scheduled monuments but also conservation areas, registered parks and gardens, registered historic landscapes, and protected historic wrecks – the most recent workforce data can be found in the Heritage Counts Wales 2018-19 report<sup>20</sup>. The report has been produced by the government-funded, charitable, voluntary and private-sector organisations that make up the membership of the Historic Environment Group for Wales (HEG) and offers a wide range of information regarding the historic environment in Wales.

<sup>19</sup> This information is available at: [Who we are | Cadw \(gov.wales\)](#)

<sup>20</sup> Available at: [Heritage Counts Report 2019 | Cadw \(gov.wales\)](#)

According to the report, the historic environment sector directly employs more than 3,500 people in Wales and has over 400 seasonal posts.

- 2.33 Previous estimates from the Valuing the Welsh Historic Environment Economic Impact Technical Report<sup>21</sup> produced by ECOTEC in 2010 estimated that the total number of FTE employees working in the 'inner cog'<sup>22</sup> of the historic environment sector amounts to almost 1,500, including some 250 seasonal FTEs.

## **Arts**

- 2.34 The Arts Council of Wales conducts biannual surveys covering all members of the Arts Portfolio Wales, a group of 67 organisations that receive core revenue funding from the Council. These surveys collect a wide range of information, including details about events and sessions organised, attendance, and workforce composition. The surveyed organisations are required to report the number of employees, volunteers and members of the board of management.
- 2.35 Data collected through the Arts Portfolio Wales Survey is then incorporated in a series of periodic publications, including the Arts Portfolio Wales Survey Highlights<sup>23</sup> and the Welsh Language Annual Reports<sup>24</sup>. The Arts Portfolio Wales Survey Highlights has been published twice: the 2021/22 release includes employment data about that specific year and the two preceding years, whereas the 2019/18 release covers that year and the previous one. As for the Welsh Language Annual Report, it has been consistently published each year between 2014/15 and 2020/21, with a gap in 2016/17. Each edition offers data about the current and the previous year.
- 2.36 Note that there are some disparities in the numbers reported between the two publications. This is attributed to the fact that the Welsh Language Annual Reports are typically released before the Arts Portfolio Wales Survey Highlights reports and therefore may not capture all data that will eventually be submitted and used within the Arts Portfolio Wales Survey Highlights reports. As a result, the Arts Portfolio Wales Survey Highlights reports should be regarded as a more reliable and

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<sup>21</sup> Available at: [Research | Cadw \(gov.wales\)](#).

<sup>22</sup> The 'inner cog' of the historic environment sector has been defined for the purpose of the study to comprise those organisations that can be considered at the core of the historic environment sector (i.e., activities concerned with the protection, enhancement and conservation of the historic environment sector)

<sup>23</sup> Available at: [Arts Portfolio Wales Survey | Arts Council of Wales](#)

<sup>24</sup> Available at: [Welsh language annual reports | Arts Council of Wales](#)

complete source of employment data. Accordingly, the following table exclusively presents data from the Welsh Language Annual Reports for years not covered by the Arts Portfolio Wales Survey Highlights reports.

**Table 2.10: Number of employees, volunteers and trustees in the Arts Portfolio Wales organisations.**

<b>Publication</b>	<b>Employee type</b>	<b>2021/ 22</b>	<b>2020/ 21</b>	<b>2019/ 20</b>	<b>2018/ 19</b>	<b>2017/ 18</b>	<b>2016/ 17</b>	<b>2015/ 16</b>	<b>2014/ 15</b>
Arts Portfolio Wales Survey Highlights	Employees	2,188	2,141	2,403	3,527	3,198			
	Volunteers	1,235	918	705	1,270	1,379			
	Trustees	569	343	355	661	662			
Welsh Language Annual Reports	Employees						3,536	4,217	4,135
	Volunteers						1,686	1,353	1,310
	Trustees						696	728	764

Source: Arts Portfolio Wales Survey Highlights and Welsh Language Annual Reports

- 2.37 The table reveals an overall decline in the number of employees within the sector over the years, although there are instances where the figure is slightly higher than the previous year. While the figures for volunteers do not display a discernible trend, there has been a noticeable increase in the last two years covered by the survey compared to its lowest point in 2019/20. Similarly, the number of board members has seen a significant increase in the most recent year covered by the survey, in contrast to the preceding two years, although it has not yet reached the levels observed before 2019/20.
- 2.38 The 2021/22 edition of Arts Portfolio Wales Survey gathered data on freelancers in the sector for the first time, revealing a total of 2,808 freelancers working in the arts.
- 2.39 APW organisations are required to collect the following workforce information, related to protected characteristics:
- Number of disabled employees
  - Number of employees with specific religious beliefs
  - Number of lesbian, gay or bisexual employees
  - Number of trans employees

- Number of ethnically and culturally diverse employees
- Number of disabled employees
- Number of employees who are pregnant or in maternity leave.

2.40 In the Arts Portfolio Wales Survey Highlights 2021/22, this information is provided in a graph format that does not allow to extract numbers. These figures are instead available for the years 2019/20 and 2018/19 in the dataset 'Open Data: Equalities Monitoring Sept 2020'<sup>25</sup>. The Policy Priorities section of the report discusses these themes in greater detail.

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<sup>25</sup> Available at: [Open data | Arts Council of Wales](#)

### 3. Users / Visitors / Attendances

- 3.1 This section summarises the availability of evidence on the level of public engagement in the culture sector, such as in terms of users, visitors and attendance.
- 3.2 The National Survey for Wales includes questions which capture data on the experience and relationship of surveyed individuals with arts and culture. The survey offers a wide range of data on the five subsectors within the scope of this review, encompassing aspects such as attendance at cultural venues or events, frequency of attendance, motivations for attending or not attending, and satisfaction levels with the experience. However, it is important to note that these questions have been asked inconsistently to participants across different subsectors and over the years,<sup>26</sup> which poses a challenge when attempting to discern the changes in these indicators over time and draw meaningful comparisons between different sectors. This holds true also for the primary indicator presented in this chapter, which serves as the most indicative measure of public engagement in cultural activities, i.e., the percentage of respondents that have visited, used or attended museums, libraries, archives, heritage sites and arts events.
- 3.3 Only the 2019/20 and 2017/18 editions of the survey provide this indicator consistently across the five subsectors. Specifically, the following questions were asked to survey participants<sup>27</sup>:
- **Museums:** In the last 12 months, have you been to a museum?
  - **Libraries:** In the last 12 months, have you used a public library service?
  - **Archives:** In the last 12 months, have you been to an archive or records office?
  - **Heritage:** In the last 12 months, have you visited any of these places? The list includes: a historic building open to the public (non-religious); a historic park or garden open to the public; a place connected with industrial history; a historic place of worship attended as a visitor; a monument such as a castle, fort or ruin; a site of archaeological interest; other historic / heritage site.

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<sup>26</sup> The National Survey for Wales offers a convenient 'results viewer' that provides an overview of the specific questions asked in each year. This tool allows users to easily access and explore the questionnaire content as well as the results of the survey for each question. The 'results viewer' can be downloaded at: [National Survey for Wales: results viewer | GOV.WALES](#)

<sup>27</sup> Similar questions have been asked in the 2021/22 edition of the survey, but only for museums and arts.

- **Arts:**

- Attendance – In the last 12 months, have you attended any of the following arts events? The list includes: film showing; theatre; dance performance; storytelling or reading event; other arts events.
- Participation – In the last 12 months, have you participated in any of these activities? The list includes: music; drama or theatrical activity; dance; film making or photography; visual arts and crafts; creative writing; making artwork or animation using digital technology; circus skills, street arts or other physical theatre activity.

3.4 The table below presents the results of these questions for 2020/19 and 2017/18.

**Table 3.1: Percentage of respondents that have used/visited/attended museums, libraries, archives, heritage and arts in previous year.**

Site	2019/20	2017/18
Museums	43%	40%
Libraries	32%	34%
Archives	5%	5%
Heritage	63%	63%
Arts – Attendance	70%	68%
Arts – Participation	19%	22%

Source: National Survey for Wales

3.5 The percentages of engaged individuals are very similar across the two years included, for all the five cultural subsectors. This suggests a consistent level of interest in cultural activities over time among the population. The highest levels of attendance are recorded at arts events. However, it is important to note that going to the cinema is also categorised as attendance at arts events within the context of this survey, which may skew the interpretation of these results.

3.6 The results viewer offers a convenient tool for promptly observing key indicators for all the questions included in the National Survey for Wales. In certain cases, it even allows for further disaggregation of these indicators based on some respondent characteristics. While some subsectors have more available characteristics for analysis, the users/visitors/attendance statistics for all subsectors can be at least



broken down by age group, highest educational qualification, household in material deprivation, sex, and Welsh Index of Multiple Deprivation. In the section of this report, a thorough analysis of selected figures within these categories is presented, providing further insight into the data relating to engagement among groups holding diverse characteristics. For a more comprehensive analysis, it is possible to request and access the complete microdata derived from the survey<sup>28</sup>, which enables the disaggregation of selected indicators by the entire range of individual characteristics collected by the survey.

- 3.7 The following sections delve into further data regarding visitors, users, and attendants within the five cultural subsectors, drawing from sector-specific evidence sources.

### **Museums**

- 3.8 Similar to the workforce data, the most up-to-date and comprehensive statistics relating to visitors to museums can be found in the Spotlight on Museums 2020 report<sup>29</sup>. This study gathers data on the overall number of physical visits to participating museums, which amounts to approximately 4.69 million visits in 2019. Notably, this figure reflects a significant increase of 22.9% compared to the 2015 edition of survey, which recorded a total of 3.8 million visits.
- 3.9 Local museums (non-Amgueddfa Cymru and non-National Trust) experienced the most significant surge, with visits increasing by 31.2% from 2015 to reach 1.59 million. Visits to Amgueddfa Cymru also witnessed a notable rise of 19% to 1.95 million visits between 2015 and 2019. National Trust properties also saw an increase in visits, with a growth of 19.1%, resulting in a total of 1.16 million visits.
- 3.10 These totals are based only on the subset of respondent museums which supplied visitor numbers for all years between 2015 and 2019. However, the report does not specify the size and composition of this sample of respondent museums.
- 3.11 A detailed breakdown of visitors by museum type is provided for the year 2019 only, along with the growth rates compared to 2015. For 2015 and the other three years

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<sup>28</sup> Available at: [UK Data Service › Study](#)

<sup>29</sup> Available at: [Spotlight on museums 2020 | GOV.WALES](#).

in between, the figures are depicted solely in a graphical form, which does not allow to extract precise numbers to be reported<sup>30</sup>.

- 3.12 Museums are also a key component of the tourism offer in Wales, as shown by the research report by Beaufort Research based on the Wales Visitor Survey 2019<sup>31</sup>. The report, based on 811 interviews with visitors to 12 tourism locations across Wales, shows that more than one out of ten tourists (11%) had visited a museum during their day trip or staying visit.
- 3.13 When breaking this figure down by respondents' area of residence, it is possible to observe that more than a quarter of overseas visitors visited a museum during their trip in Wales (26%) compared to 10% of those from Wales and 15% of those from the rest of the UK. Furthermore, visitors staying overnight were most likely to visit museums compared to those on day trips (24% vs. 10% respectively).

### **Libraries**

- 3.14 The Public Library Service Annual Reports – redacted by each local authority in compliance with the Welsh Public Library Standards 2017-2020<sup>32</sup> – provide three per capita figures regarding users of public libraries. These are:
- The total number of visits to library premises during the year divided by the resident population, multiplied by 1,000.
  - The total number of external visits to the libraries' websites during the year divided by the resident population, multiplied by 1,000.
  - The total number of active borrowers during the year divided by the resident population, multiplied by 1,000.
- 3.15 Similar to the workforce data as described in the previous section, the most recent values for these indicators are from the 2019/20 Public Library Service Annual Reports<sup>33</sup>. The table below displays these metrics for each of the 22 local authorities.

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<sup>30</sup> See page 19 of the [report](#).

<sup>31</sup> Available at: [Wales visitor survey 2019: visitors to museums and areas of historic interest | GOV.WALES](#)

<sup>32</sup> Available at: [Measuring the public library service: our standards | GOV.WALES](#)

<sup>33</sup> Available at: [Public library service annual reports 2019 to 2020 | GOV.WALES](#)

**Table 3.2: Library visits, virtual visits and active borrowers for 1,000 resident population by local authority, 2019/20.**

	<b>Visits per capita</b>	<b>Virtual visits per capita</b>	<b>Active borrowers per capita</b>
Blaenau Gwent	4,380	395	86
Bridgend	3,546	677	198
Caerphilly	3,596	434	205
Cardiff	6,874	2,131	244
Carmarthenshire	6,291	1,233	128
Ceredigion	4,012	1,183	157
Conwy	3,270	1,384	159
Denbighshire	4,031	1,383	186
Flintshire	3,740	407	113
Gwynedd	2,741	1,082	147
Isle of Anglesey	4,094	1,796	114
Merthyr Tydfil	3,564	1,055	145
Monmouthshire	4,742	484	126
Neath Port Talbot	4,175	703	87
Newport	2,429	744	85
Pembrokeshire	4,328	1,042	137
Powys	4,007	1,607	152
Rhondda Cynon Taff	2,968	615	78
Swansea	3,762	924	175
Torfaen	3,333	239	128
Vale of Glamorgan	5,333	240	226
Wrexham	2,498	247	122

Source: Public Library Service Annual Reports 2019/20

- 3.16 As can be observed in the table, Cardiff displays the highest number of visits, virtual visits and active borrowers for 1,000 resident population. By multiplying these

figures by the resident population (divided by 1,000) of each local authority<sup>34</sup> and summing up the resulting numbers, it is possible to estimate of the total number of (i) library visits, (ii) virtual visits and (iii) active borrowers in Wales. These are respectively (i) 13,257,649, (ii) 3,075,690 and (iii) 484,799. Library visits, virtual visits and active borrowers are also available for the years 2018/19<sup>35</sup> and 2017/18<sup>36</sup>.

## Archives

- 3.17 The Chartered Institute of Public Finance & Accountancy (CIPFA) periodically conducts a survey of visitors to UK archives on behalf of the Archive & Records Association (ARA). The results of the latest edition of this survey – conducted in 2022 – are available in an open data format that allows to extract numbers specific to Wales’ archives<sup>37</sup>. Fifteen archives are included within the scope of this survey<sup>38</sup>.
- 3.18 The CIPFA study does not provide data on the overall number of visitors to archives or percentage of population using archive services. Nevertheless, it offers valuable information about visitors’ characteristics, their reasons for visiting archives, their satisfaction with archive services, as well as information unrelated to archives, such as primary method of travel and other activities planned by visitors in the same area.
- 3.19 The table below presents an overview of respondents’ motivations to use archive services.

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<sup>34</sup> The estimated number of residents by local authority is available on StatsWales at: [Population estimates by local authority and year \(gov.wales\)](#)

<sup>35</sup> Available at: [Public library service annual reports 2018 to 2019 | GOV.WALES](#)

<sup>36</sup> Available at: [Public library service annual reports 2017 to 2018 | GOV.WALES](#)

<sup>37</sup> Available as ‘Survey of Visitors to UK Archives 2022 benchmarking’ at: [A range of resources for the record keeping sector — Archives & Records Association](#)

<sup>38</sup> The 15 archives are: North East Wales Archives (Hawarden), North East Wales Archives (Ruthin), The National Library of Wales, Carmarthenshire Archives, Ceredigion Archives, Pembrokeshire Archives and Local Studies, Glamorgan Archives, West Glamorgan Archive Service, University of Swansea, Richard Burton Archives, Gwent Archives, Anglesey Archives, University of Bangor, Cardiff University Special Collections and Archives, Royal Commission On The Ancient And Historical Monuments Of Wales, and Conwy Archive Service.

**Table 3.3: Reasons for visiting archives, 2022.**

<b>Reasons for visiting archives</b>	<b>% of respondents selecting each reason</b>
Academic research	29.8%
Architectural / building / site research	10.5%
Family history	31.2%
Military history	2.3%
Local history	31.4%
General browsing / familiarising myself with the archive	8.6%
To find evidence relating to rights and entitlements	4.5%
To find information or evidence relating to my work or for the organisation I volunteer for	9.9%
To gather information for a talk / publication / presentation	10.9%
Other	9.4%

Source: Survey of Visitors to UK Archives 2022

3.20 Almost one out of three respondents visited archives to gather information about local history or family history. The third most prevalent reason selected by archive users is academic research.

3.21 The table below displays the percentage of male and female archive users, as well as their distribution across age groups.

**Table 3.4: Distribution of archive users by gender and age, 2022.**

		<b>% of respondents</b>
<b>Gender</b>	Female	51.6%
	Male	48.4%
<b>Age group</b>	Under 25	13.7%
	25 to 44	12.8%
	45 to 64	27.2%
	65 to 74	30.9%
	75 or over	15.3%

Source: Survey of Visitors to UK Archives 2022

- 3.22 Among the respondents, the number of female archive users slightly exceeds their male counterpart. The average age of respondents is just above 56 years. However, the majority of respondents fall into the age bracket of 65 to 74 and a significant portion of respondents (15.3%) comprises of individuals aged over 75. In contrast, users below the age of 25 make up only 13.7% of the total. These findings indicate that archive services are predominantly utilised by older adults.
- 3.23 The survey provides additional information about respondents' characteristics, including ethnicity, Welsh Index of Multiple Deprivation, and long-lasting physical or mental health conditions. These themes will be explored in greater depth in the Policy Priorities section of the report.
- 3.24 In 2021, CIPFA also conducted a survey of users of archive distance enquiry services. This survey gathered similar data to the Survey of Visitors to UK Archives 2022, including specific information about users' experiences with distance enquiry services. The report, along with the open data that enables the extraction of Wales-specific results, can be found in the 'Resources' section of the ARA website<sup>39</sup>.

### **Heritage**

- 3.25 Since 2020, Cadw has been consistently publishing an annual report containing a wealth of insightful data<sup>40</sup>. The reports also include the total number of visitors to Cadw's staffed sites between March of the previous year and April of the current year. This same figure for 2018/19 is provided by the Heritage Counts Wales 2018-19 report<sup>41</sup>. The following table details the total number of visitors to Cadw's sites for the four years for which this data is available.

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<sup>39</sup> Available at: [A range of resources for the record keeping sector — Archives & Records Association](#).

<sup>40</sup> The three published reports are available at: [What we do | Cadw \(gov.wales\)](#)

<sup>41</sup> Available at: [Heritage Counts Report 2019 | Cadw \(gov.wales\)](#)

**Table 3.5: Total number of visitors to Cadw’s staffed heritage sites.**

<b>Year</b>	<b>Number of visitors</b>
April 2021 – March 2022	902,327
April 2020 – March 2021	113,908
April 2019 – March 2020	1,260,000
April 2018 – March 2019	1,321,400

Sources: Cadw Annual Reports and Heritage Counts Wales 2018-19 report

- 3.26 The impact of the Covid-19 pandemic is reflected in the sharp decline of visitor numbers in 2020/21. The table shows a positive trend of recovery in number of visitors in 2021/22, although the figure has not yet reached the levels recorded before the pandemic.
- 3.27 To gain insights into visitor’ profiles and experiences, Cadw periodically surveys its visitors at major heritage sites. These surveys are conducted during both the peak season, which spans from July to August, and the shoulder season, which falls between March and April. The peak season visitor survey has been carried out in 2022, 2018, and 2015<sup>42</sup>, while the shoulder season survey has been conducted only twice thus far, in 2018 and 2015<sup>43</sup>.
- 3.28 The surveys gather a wide range of data regarding visitors of heritage sites, including their profile, purpose of visit, motivations, group composition, distance travelled, and sources of awareness. The table overleaf compares the age and origin of peak season visitors over the three survey editions. More detailed analysis of other visitor characteristics such as ethnicity and socioeconomic segment is located in in the Policy Priorities section.

<sup>42</sup> All editions are available at: [Research | Cadw \(gov.wales\)](#)

<sup>43</sup> All editions are available at: [Research | Cadw \(gov.wales\)](#)

**Table 3.6: Distribution of peak season heritage visitors by age and area of residence.**

		<b>2022</b>	<b>2018</b>	<b>2015</b>
<b>Age group</b>	Under 7	10%	11%	12%
	8 to 15	17%	14%	13%
	16 to 24	8%	10%	7%
	25 to 34	10%	11%	11%
	35 to 44	17%	16%	17%
	45 to 54	14%	12%	15%
	55 to 64	11%	11%	11%
	65 or over	13%	15%	14%
<b>Area of residence</b>	Wales	22%	27%	25%
	UK outside Wales	63%	54%	56%
	Overseas	15%	19%	19%

Source: Cadw Peak Season Visitor Survey 2022

- 3.29 The age distribution of visitors during the 2022 peak season broadly reflects the patterns observed in the previous two survey editions. The visitor profile at major Cadw sites demonstrates disproportionate representation in the age group 8 to 15, as well as in one of the associated parent age groups, 35 to 44. In contrast, Cadw visitors are relatively under-represented in the age groups 16 to 24 and over 65.
- 3.30 Concerning the area of residence, there has been a shift in the origin of visitors over the years, with a growing share of visitors from the UK outside of Wales. This change in the proportion of 'UK outside Wales' visitors have come in contrast with the declining proportions of both Welsh visitors and overseas visitors.
- 3.31 The table overleaf shows the same indicators for the 2018 and 2015 shoulder season visitor survey.



**Table 3.7: Distribution of shoulder season heritage visitors by age and area of residence.**

		<b>2018</b>	<b>2015</b>
<b>Age group</b>	16 to 19	1%	2%
	20 to 24	7%	5%
	25 to 34	23%	21%
	35 to 44	26%	26%
	45 to 54	17%	20%
	55 to 59	8%	8%
	60 to 64	7%	7%
	65 or over	11%	11%
<b>Country of residence</b>	Wales	33%	43%
	UK outside Wales	54%	48%
	Overseas	13%	9%

Source: Cadw Shoulder Season Visitor Survey 2022

- 3.32 Nearly half of the respondents in both years fall within the age range 25 to 44. However, the survey does not include children aged 15 or younger. It is unclear whether this exclusion is a deliberate choice or if children simply do not typically visit heritage sites during the shoulder season.
- 3.33 The survey reveals a decline of 10 percentage points in the number of visitors from Wales between the two survey editions. In contrast, there has been an increase in the proportion of visitors from both the rest of the UK and overseas.

### **Arts**

- 3.34 Since 1993, the Arts Council of Wales has conducted an annual survey to gather data on attendance at arts events and participation in artistic activities<sup>44</sup>. To collect this data, the Arts Council of Wales relies on a series of questions administered through the Beaufort Research Ltd Wales Omnibus survey. The sample of respondents to this survey is designed to be representative of the adult population resident in Wales aged 16 years and over.

<sup>44</sup> The 2020 and 2019 editions are available at: [Annual Surveys | Arts Council of Wales](#)

3.35 Regarding attendance to arts events, the percentage of adults who attended arts events once or more in a given year is available for every year between 2010 and 2020, as shown in the table below.

**Table 3.8: Attendance to arts events once or more in a given year**

<b>Year</b>	<b>% of respondents attending arts events</b>
2010	79.20%
2011	74.40%
2012	76.30%
2013	75.10%
2014	79.80%
2015	78.60%
2016	78.10%
2017	80.70%
2018	84.60%
2019	86.80%
2020	75.10%

Source: 2020 Wales Omnibus Survey: Adult Engagement in the Arts

3.36 In 2020, more than 3 out of 4 adults (75.1%) attended arts events at least once in the previous year. The equivalent figure for 2019 is substantially higher (86.8%), representing the peak of an increasing trend of attendance in the arts, which grew steadily from 2016 to 2019. The 2020 figure brings the attendance levels back to those observed in 2013. However, the report highlights that 2020 data cannot be compared like for like with previous years due to a change in methodology. In particular, the survey was conducted online for the first time because of the restriction imposed by the Covid-19 pandemic.

3.37 It is worth noting that this figure is significantly influenced by attendance at movie screenings. If cinema attendances are excluded, the percentage of adults attending arts events at least once a year in 2020 drops to 64.1%, with the equivalent figure for 2019 being 82.4%.

3.38 Regarding participation in arts activities, the following table displays the percentage of adults that took part once a year or more often in any artistic activities from 2010 to 2020.

**Table 3.9: Participation in arts activities once a year or more between 2010 and 2020.**

<b>Year</b>	<b>% of respondents participating in arts activities</b>
2010	30.4%
2011	28.9%
2012	40.2%
2013	34.9%
2014	40.1%
2015	41.2%
2016	44.1%
2017	45.8%
2018	45.6%
2019	49.3%
2020	56.6%

Source: 2020 Wales Omnibus Survey: Adult Engagement in the Arts

3.39 The year 2020 witnessed a significant milestone as for the first time more than half of the respondents participated in arts activities at least once in the preceding year. This achievement is the culmination of a steady upward trend that has persisted nearly uninterrupted since 2014. Nonetheless, as in the case of attendance to arts events, it is important to exercise caution when interpreting the 2020 figure, considering the change in context and methodology caused by the Covid-19 pandemic.

3.40 The Omnibus Survey provides the possibility to delve into the attendance and participation data by segmenting them based on various individual characteristics – including social grade, age, gender, region and Welsh language – as well as based

on the different artforms under consideration<sup>45</sup>. Some of these dimensions will be explored in the Policy Priorities section.

- 3.41 Additionally, the Beaufort Research Children's Omnibus Survey, conducted annually on behalf of the Arts Council of Wales, gathers data on attendance and participation in the arts among children and young people, following a similar approach to that used for adults. Detailed figures on children attendance and participation spanning from 2010 to 2019 are available in the Children's Omnibus Survey 2019 report.<sup>46</sup>
- 3.42 The Arts Portfolio Wales Survey offers another valuable source of data on attendance at arts events. The 2021/22 Arts Portfolio Wales Survey Highlights report<sup>47</sup> reveals a total of 2,862,837 attendances across over 48,000 events organised by the Arts Portfolio Wales organisations. The survey captures data on attendance at various types of events and participatory sessions, while also collecting information on audience characteristics. However, the highlights report primarily presents these indicators in a graphical format, which does not allow to extract precise figures.

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<sup>45</sup> The artforms for attendance to art events are: cinema; musicals (not opera); opera; ballet; contemporary dance performances; plays; classical music concerts or recitals; jazz concerts or performances; folk, traditional or world music; other live music; art or craft galleries or exhibitions; readings, storytelling and other literary events; carnivals and street arts; arts festivals. The artforms for participation in arts activities are: music; drama or theatrical activity; dance; film and video making or photography; visual arts and crafts; creative writing; digital arts.

<sup>46</sup> Available at: [Annual Surveys | Arts Council of Wales](#)

<sup>47</sup> Available at: [Arts Portfolio Wales Survey | Arts Council of Wales](#)

## 4. Organisations

4.1 This section presents information regarding the number and geographical distribution of organisations, institutions, or sites within each of the five subsectors in scope. There is no unified data source encompassing all five subsectors available.

### Museums

4.2 According to the Spotlight on Museums 2020 report<sup>48</sup>, there are 160 organisations in Wales which could be called a museum or define themselves as museums. Out of these 160 museums, 106 possess the ‘accredited’ status<sup>49</sup>.

4.3 A list of accredited museums and galleries in Wales<sup>50</sup> – last updated in April 2021 and counting 101 organisations<sup>51</sup> – provides an overview of the number and types of accredited museums. These include 29 local authority museums, 45 independent museums, 7 National Museums, 13 National Trust museums, 4 regimental museums and 3 university museums. The geographic distribution of these 101 museums is provided in the following table.

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<sup>48</sup> Available at: [Spotlight on museums 2020 | GOV.WALES](#).

<sup>49</sup> Museum Accreditation is a UK partnership scheme run by Arts Council England and managed by the Welsh Government in Wales. The scheme aims to ensure that museums meet certain professional standards in areas such as governance, collections management, visitor services, and education. The accreditation process involves a museum submitting an application that provides evidence of its compliance with the accreditation standards. This evidence is assessed by a panel of experts who review the museum's policies, procedures, and practices. If the museum meets the required criteria, it is granted accredited status. Accreditation is a voluntary process, and not all museums in Wales choose to pursue it.

<sup>50</sup> Available at: [Accredited museums | GOV.WALES](#)

<sup>51</sup> The list also includes 9 museums with ‘working towards accreditation status’, but it is not known which of these have obtain the accreditation, to reach the total of 106 reported in the latest Spotlight on Museum report.

**Table 4.1: Count of accredited museums by local authority, 2021.**

<b>Local authority</b>	<b>N. of museums</b>
Blaenau Gwent	5
Bridgend	1
Caerphilly	1
Cardiff	6
Carmarthenshire	6
Ceredigion	4
Conwy	5
Denbighshire	6
Flintshire	4
Gwynedd	13
Isle of Anglesey	4
Merthyr Tydfil	2
Monmouthshire	5
Neath Port Talbot	1
Newport	3
Pembrokeshire	7
Powys	12
Rhondda Cynon Taff	5
Swansea	4
Torfaen	3
Vale of Glamorgan	1
Wrexham	3

Source: Welsh Government

## Libraries

4.4 CILIP Cymru Wales worked with the National Library of Wales and LibrariesHacked to create a visual dataset of libraries in Wales<sup>52</sup>. According to this dataset, there is a total of 378 libraries across Wales. Out of these, 259 are public libraries. The remaining 99 libraries are divided between health libraries, higher education libraries and further education libraries<sup>53</sup>. The table below displays the number of public libraries in each local authority.

**Table 4.2: Count of public libraries by local authority, 2023.**

Local authority	No. of libraries
Blaenau Gwent	6
Bridgend	13
Caerphilly	18
Cardiff	21
Carmarthenshire	21
Ceredigion	6
Conwy	13
Denbighshire	8
Flintshire	10
Gwynedd	18
Isle of Anglesey	10
Merthyr Tydfil	7
Monmouthshire	7
Neath Port Talbot	17
Newport	10
Pembrokeshire	12
Powys	18
Rhondda Cynon Taff	18
Swansea	-

<sup>52</sup> Available at: [Libraries in Wales - CILIP: the library and information association](#)

<sup>53</sup> The list and map of all libraries in Wales is available at: [Wikidata Query Service](#)

Torfaen	4
Vale of Glamorgan	10
Wrexham	12

Source: CILIP

- 4.5 The table indicates an absence of public libraries within Swansea, which stands in contrast to the information documented in the Public Library Service Annual Reports.<sup>54</sup> This suggests that the list compiled by CILIP may be incomplete.

### Archives

- 4.6 On the Archive Wales website it is possible to access a list of all repositories in Wales<sup>55</sup>, for which there are a total of 22 archives across the country. The table below displays the count of archives for each local authority where at least one archive is located.

**Table 4.3: Count of archives by local authority, 2023.**

Local authority	No. of archives
Cardiff	3
Carmarthenshire	2
Ceredigion	3
Conwy	1
Flintshire	1
Gwynedd	3
Isle of Anglesey	1
Neath Port Talbot	2
Newport	1
Pembrokeshire	1
Powys	2
Swansea	1

Source: Archives Wales

<sup>54</sup> Available at: [Public library service annual reports 2019 to 2020 | GOV.WALES.](#)

<sup>55</sup> Available at: [Welsh Archive Repositories – Archives Wales](#)



## Heritage

4.7 The Heritage Count Wales 2018-19 report<sup>56</sup> reveals that Wales has a total of 30,015 listed buildings and 4,198 scheduled monuments. From the Cadw website, it is possible to extract the complete list of heritage sites under their management<sup>57</sup>, which comprises a total of 122 listed buildings and scheduled monuments (although the official total count of Cadw's property is 131), most of which are open to the public. The following table shows the number of Cadw properties in each local authority area where at least one heritage site is located.

**Table 4.4: Count of Cadw heritage sites by local authority, 2023**

Local authority	No. of heritage sites
Bridgend	2
Caerphilly	1
Cardiff	1
Carmarthenshire	7
Ceredigion	2
Conwy	6
Denbighshire	12
Flintshire	5
Gwynedd	13
Isle of Anglesey	22
Monmouthshire	14
Neath Port Talbot	2
Newport	4
Pembrokeshire	12
Powys	6
Rhondda Cynon Taff	1
Swansea	5
Torfaen	1

<sup>56</sup> Available at: [Heritage Counts Report 2019 | Cadw \(gov.wales\)](#)

<sup>57</sup> Available at: [Find a place to visit | Cadw \(gov.wales\)](#)

Vale of Glamorgan	6
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Source: Cadw

### Arts

- 4.8 For obtaining information on the number of companies in the arts sector, a valuable resource is the Creative Economy Atlas Cymru developed by Clwstwr<sup>58</sup>. The Atlas explores the geographical distribution and scale of the creative industries across Wales, broken down by creative subsector. The data utilised in the Atlas derives from the ORBIS database, an extensive resource for comparable information on private companies. The Atlas provides data on the number of companies, number of employees and turnover in the nine DCMS 'Creative Industries'.<sup>59</sup>
- 4.9 The following table displays the number of companies in the 'Music, performing and visual arts' sector across local authorities.

**Table 4.5: Count of companies in the 'Music, performing and visual arts' sector by local authority, 2023.**

Local authority	No. of companies
Blaenau Gwent	18
Bridgend	39
Caerphilly	42
Cardiff	382
Carmarthenshire	77
Ceredigion	40
Conwy	50
Denbighshire	42
Flintshire	3
Gwynedd	69
Isle of Anglesey	30

<sup>58</sup> Available at: [Creative Economy Atlas Cymru \(datahubmaps.com\)](https://datahubmaps.com)

<sup>59</sup> The DCMS 'Creative Industries' are: 1) advertising and marketing; 2) architecture; 3) crafts; 4) design and designer fashion; 5) film, TV, video, radio and photography; 6) IT, software and computer services; 7) publishing; 8) museums, galleries and libraries; 9) music, performing and visual arts. Information on the SIC07 codes associated with these sector classifications are available at: [DCMS Sectors Economic Estimates Methodology - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/dcms-sectors-economic-estimates-methodology)

Merthyr Tydfil	6
Monmouthshire	66
Neath Port Talbot	31
Newport	57
Pembrokeshire	55
Powys	87
Rhondda Cynon Taff	63
Swansea	112
Torfaen	17
Vale of Glamorgan	92
Wrexham	37

Source: Welsh Government

4.10 It is important to acknowledge that the scope of the 'Music, performing, and visual arts' sector differs partially from the definition of the arts sector used elsewhere in this report when presenting data from DCMS statistics. Specifically, this report adopts the definition of the 'Arts' sector as set out in Table 1.1, which is part of DCMS Cultural Sector, whereas the Creative Economy Atlas Cymru adopts the definition of 'Music, performing and visual arts' sector which is part of DCMS Creative Industries<sup>60</sup>. The difference between the two categorisations in terms of activities included are as follows:

- The "Arts" sector – part of DCMS Cultural Sector – includes all economic activities under the following four SIC07 codes, as detailed in Table 1.1:
  - 9001 – Performing arts
  - 9002 – Support activities to performing arts
  - 9003 – Artistic creation
  - 9004 – Operation of arts facilities
- The 'Music, performing and visual arts' sector – part of DCMS Creative Industries – includes the same four SIC07 codes as above, along with two additional ones:
  - 5920 – Sound recording and music publishing activities

<sup>60</sup> More information on this topic is available at: [DCMS Sectors Economic Estimates Methodology - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/444444/DCMS_Sectors_Economic_Estimates_Methodology_-_GOV.UK.pdf)

- 8552 – Cultural education

4.11 Therefore, the 'Music, performing and visual arts' sector considered in the table above is larger than the arts sector as defined in Table 1.2 and 4.7, as it also includes activities related to cultural education and to sound recording and music publishing.

## 5. Policy Priorities

- 5.1 This section provides an overview of the availability of evidence on the contribution of the culture sector to eight policy priorities, identified as being important by Welsh Government policymakers and stakeholders.

### **Environmental impact and decarbonisation**

- 5.2 The availability of data within the sources reviewed concerning the environmental impact of organisations in the five culture subsectors and their commitment to decarbonisation is extremely limited. The Arts Portfolio Wales Survey Highlights 2021-2022<sup>61</sup> provide the only indicators relevant to these subjects. According to the report, 29% of Arts Portfolio Wales organisations currently possess an Environmental Monitoring System (EMS). More than half of these organisations (53%) are actively working towards establishing an EMS, while a minority of about 10% have no intention of doing so. Additionally, the report reveals that 85% of Arts Portfolio Wales organisations have an environmental policy in place.

### **Digitisation and digital skills**

- 5.3 The availability of data on the digitisation efforts within the five cultural sectors is scarce and fragmented. The existing information is limited and varies across the different sectors, making it difficult to form a comprehensive understanding of the topic. Nevertheless, some interesting figures are available for museums, libraries and the arts.

#### *Museums*

- 5.4 According to the Spotlight on Museums 2020 report<sup>62</sup>, 95% of the surveyed museums have their own websites, while 87% actively utilise social media platforms. Interestingly, the report reveals that website visits decreased from 3.9m in 2015 to 3.3m in the survey year. In contrast, the number of social media subscribers and followers witnessed a significant growth, more than doubling from 236,293 in 2015 to 591,808 in 2020. These figures may suggest that social media

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<sup>61</sup> Available at: [Arts Portfolio Wales Survey | Arts Council of Wales](#)

<sup>62</sup> Available at: [Spotlight on museums 2020 | GOV.WALES](#)

platforms are increasingly becoming a more effective medium for engaging the public compared to websites.

- 5.5 Spotlight on Museum 2020 also indicates that only 32% of museums reported a substantial portion of their collections being available online. This finding underscores the need for further efforts to enhance digital accessibility and expand online offerings within the museum sector.

### *Libraries*

- 5.6 Following the Welsh Public Library Standards 2017-2020<sup>63</sup>, local authorities are required to provide information on three indicators relating to digital accessibility in public libraries. Firstly, they must report whether each static library under their jurisdiction has at least one device available to the public for internet access and access to networked digital content. All local authorities are reported to have met this requirement in 2019/20<sup>64</sup>.
- 5.7 Secondly, local authorities are required to report whether each static library under their administration provides Wi-Fi access, enabling users to connect their personal laptops or mobile devices. Only one local authority failed to meet this requirement in 2019/20.
- 5.8 Lastly, local authorities must provide the total number of devices available for public Internet access per 10,000 population. The table overleaf presents this indicator for each local authority in 2019/20.

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<sup>63</sup> Available at: [Measuring the public library service: our standards | GOV.WALES](#)

<sup>64</sup> More information available at: [Public library service annual reports 2019 to 2020 | GOV.WALES](#)

**Table 5.1: Number of devices in libraries giving public access to the Internet per 10,000 population by local authority, 2019/20.**

<b>Local authority</b>	<b>No. of libraries</b>
Blaenau Gwent	9
Bridgend	6
Caerphilly	14
Cardiff	12
Carmarthenshire	11
Ceredigion	7
Conwy	11
Denbighshire	10
Flintshire	7
Gwynedd	8
Isle of Anglesey	9
Merthyr Tydfil	10
Monmouthshire	8
Neath Port Talbot	6
Newport	4
Pembrokeshire	12
Powys	10
Rhondda Cynon Taff	7
Swansea	8
Torfaen	8
Vale of Glamorgan	9
Wrexham	10

Source: Public Library Service Annual Reports 2019/20

- 5.9 In terms of per capita devices providing access to the internet, Caerphilly emerges as the local authority with the highest number, while Newport records the lowest number. The majority of local authorities offer between 8 and 11 access points to

the internet per 10,000 residents within their public libraries. These figures are also available for the years 2018/19<sup>65</sup> and 2017/18<sup>66</sup>.

## Arts

- 5.10 The Arts Portfolio Wales Survey Highlights 2021/22<sup>67</sup> reports the number of Arts Portfolio Wales organisations that use social media platforms for audience building and communications, and for hosting creative content, as shown in the table below.

**Table 5.2: Number and percentage of Arts Portfolio Wales organisations using social media platforms, 2021/22.**

Social media platform	Platform use: audience building and comms		Platform use: hosting creative content	
	n. of organisations	% of organisations	n. of organisations	% of organisations
Facebook	60	87%	43	62%
Twitter	59	86%	36	52%
Instagram	57	83%	41	59%
SnapChat	1	1%	1	1%
YouTube	34	49%	46	67%
Vimeo	11	16%	14	20%
SoundCloud	3	4%	13	19%
Spotify	4	6%	6	9%
AM	12	17%	14	20%
TikTok	4	6%	3	4%

Source: Arts Portfolio Wales Survey

- 5.11 Among social media platforms, Facebook, Twitter, and Instagram stand out as the most popular choices for engaging and communicating with the audience, whereas YouTube takes the lead as the preferred platform for hosting creative content.

<sup>65</sup> Available at: [Public library service annual reports 2018 to 2019 | GOV.WALES](#)

<sup>66</sup> Available at: [Public library service annual reports 2017 to 2018 | GOV.WALES](#)

<sup>67</sup> Available at: [Arts Portfolio Wales Survey | Arts Council of Wales](#)



## **Welsh language**

- 5.12 Data regarding the prevalence of the Welsh language in the culture sector – whether in relation to cultural offerings in the five sub-sectors, the proportion of Welsh-speaking workers, or audiences at Welsh-language events – is currently only available for the libraries and arts sectors.

### *Libraries*

- 5.13 Within the Public Library Service Annual Reports, each local authority is required to provide information regarding the Welsh language offerings of its public libraries. Specifically, the two indicators are:
- Whether the local authorities achieved either a minimum expenditure of 4% of the material budget on Welsh language resources, or a minimum of £750 per 1,000 Welsh speaking resident population, and
  - The total issues of resources in the Welsh language per 1,000 Welsh speaking resident population.
- 5.14 According to the Public Library Service Annual Reports 2019/20<sup>68</sup>, the first indicator has been met by 18 out of 22 local authorities. Regarding the second indicator, the table overleaf reports the per capita issues of resources in Welsh for each local authority in 2019/20.

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<sup>68</sup> Available at: [Public library service annual reports 2019 to 2020 | GOV.WALES](#)

**Table 5.3: Total issues of resources in the Welsh language per 1,000 Welsh speaking resident population by local authority, 2019/20.**

<b>Local authority</b>	<b>N. of museums</b>
Blaenau Gwent	311
Bridgend	660
Caerphilly	493
Cardiff	928
Carmarthenshire	671
Ceredigion	1,134
Conwy	853
Denbighshire	1,468
Flintshire	528
Gwynedd	913
Isle of Anglesey	853
Merthyr Tydfil	406
Monmouthshire	333
Neath Port Talbot	356
Newport	351
Pembrokeshire	361
Powys	614
Rhondda Cynon Taff	565
Swansea	622
Torfaen	853
Vale of Glamorgan	829
Wrexham	862

Source: Public Library Service Annual Reports 2019/20

- 5.15 Denbighshire stands out as the local authority with the highest number of Welsh-language resources per 1,000 Welsh-speaking population (1,468), followed by Ceredigion, with 1,134 resources. Most other local authorities fall within the range of 500 to 1,000 Welsh-language resources per 1,000 Welsh-speaking population in

their public libraries. These statistics are also available for the years 2018/19<sup>69</sup> and 2017/18<sup>70</sup>.

### Arts

- 5.16 The Arts Portfolio Wales Survey annually collects two sets of indicators that are relevant for understanding the prevalence of Welsh language in the arts sector. Arts Portfolio Wales organisations are required to report the number of events and participatory sessions held in Welsh, as well as the number of Welsh speaking employees, volunteers and board members. These statistics can be found in the Welsh Language Annual Reports<sup>71</sup>.
- 5.17 The table below presents the number of events and sessions held in Welsh, along with the corresponding number of participants.

**Table 5.4: Number of events and participatory sessions from Arts Portfolio Wales organisations held in Welsh and relative participants.**

	Events		Participatory sessions	
	Number	Attendants	Number	Participants
2020/21	53	14,034	3,497	103,729
2019/20	1,155	87,077	3,483	74,993
2018/19	665	73,097	9,095	91,783
2017/18	1,004	110,038	6,371	123,103
2016/17	1,074	101,053	9,973	191,620
2015/16	995	128,312	7,829	156,778
2014/15	869	90,854	6,268	130,350

Source: Welsh Language Annual Reports

- 5.18 During the seven-year period under consideration, there were significant fluctuations in both the number of events and participatory sessions, as well as the number of participants involved. These fluctuations make it challenging to discern any clear trends. However, a notable observation emerges when examining the impact of Covid-19, as reflected in the figures for 2021/22. Despite the substantial

<sup>69</sup> Available at: [Public library service annual reports 2018 to 2019 | GOV.WALES](#)

<sup>70</sup> Available at: [Public library service annual reports 2017 to 2018 | GOV.WALES](#)

<sup>71</sup> Available at: [Welsh language annual reports | Arts Council of Wales](#)

reduction in the number of events over this period, the number of participatory sessions remained relatively unaffected. This suggests that hosting participatory sessions online was likely more feasible, enabling the continuation of such activities despite the restrictions imposed by the pandemic. The Welsh Language Annual Reports do not report the total number of events and participatory sessions, thus not allowing to determine the share of these activities conducted in Welsh.

5.19 When it comes to the workforce, the Welsh Language Annual Reports provide information on the total count of employees, volunteers, and board members, and on the number of individuals in each category who speak Welsh. The table below presents the percentages of Welsh speaking workers in each category. Data on the number of Welsh-speaking volunteers is unavailable before 2018/19.

**Table 5.5: Percentage of Welsh-speaking employees, volunteers and board members in the Arts Portfolio Wales organisations.**

	<b>% of Welsh-speaking employees</b>	<b>% of Welsh-speaking volunteers</b>	<b>% of Welsh-speaking board members</b>
2020/21	33%	26.7%	43.2%
2019/20	30.5%	19.2%	38.4%
2018/19	21.5%	15.2%	36.9%
2017/18	30.3%	-	33.4%
2016/17	33.3%	-	31.9%
2015/16	25.5%	-	29.5%
2014/15	27%	-	28.9%

Source: Welsh Language Annual Reports

5.20 Over the years, the proportion of Welsh speaking employees has experienced minor fluctuations, with the highest percentage observed in 2016/17 and 2020/21, where approximately one out of every three workers were Welsh speakers. In contrast, the percentage of Welsh-speaking board members has shown consistent growth throughout the seven-year period under review, surpassing 43% in 2020/21. Similarly, the share of Welsh-speaking volunteers has witnessed significant growth. However, as data on volunteers span only three years, it would be imprudent to make conclusive statements about long-term trends.

### Impacts on well-being

5.21 The National Survey for Wales included in its 2018/19 and 2021/22 editions a series of questions about attitudes towards arts and culture. Two of these questions capture respondents' perspectives on the perceived well-being effects of engaging with arts and cultural activities. The table below presents these questions along with the corresponding levels of agreement expressed by participants in the 2021/22 survey edition.

**Table 5.6: Attitudes to arts and culture: respondents' agreement to a set of statements, 2021/22.**

Attitude description	Strongly agree	Tend to agree	Neutral	Tend to disagree	Strongly disagree
Taking parts in arts and cultural activity helps people to build their confidence.	57%	34%	8%	1%	0%
Arts and cultural activity help to enrich the quality of my life.	33%	30%	16%	14%	8%

Source: National Survey for Wales, 2021/22

5.22 Over 90% of the respondents demonstrated agreement regarding the positive impact of arts and cultural activities in fostering confidence among individuals. A significant majority (66%) also expressed agreement about arts and culture's ability to enhance the overall quality of life.

5.23 Additional Information on the impact of cultural activities on the well-being of beneficiaries from sector-specific sources is available for the museum and library sectors.

#### *Museums*

5.24 According to the Spotlight on Museums 2020 report<sup>72</sup>, several questions were inserted into the Spotlight survey to assess the impact of museums on visitor wellbeing. However, only 13 museums reported using the UCL Museum Wellbeing Measures Toolkit - a set of scales of measurement used to assess levels of

<sup>72</sup> Available at: [Spotlight on museums 2020 | GOV.WALES](https://gov.wales/spotlight-on-museums-2020)

wellbeing arising from participation in museum and gallery activities.<sup>73</sup> The findings from these museums demonstrated significant enhancements in visitor wellbeing. Some reported improvements as high as 42% with the majority around the 20% position.<sup>74</sup>

### *Libraries*

- 5.25 Following the Welsh Public Library Standards 2017-2020<sup>75</sup>, each local authority conducted a survey of adults and children library users, at least once during the three-year period of the framework. Local authorities are required to report:
- a) the percentage of adults who think that using the library has helped them develop new skills;
  - b) the percentage of young people who think that the library helps them learn and find things out;
  - c) the percentage of adults who have found helpful information for health and wellbeing at the library;
  - d) the percentage of adults who experience the library as an enjoyable, safe and inclusive place;
  - e) the percentage of adults who think that the library has made a difference to their lives.
- 5.26 The table presented overleaf provides descriptive statistics that summarize the survey results provided by each local authority in the Public Library Service Annual Reports 2019/20. It must be noted that not all local authorities collected data for every indicator.

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<sup>73</sup> More information on the UCL Museum Wellbeing Measures Toolkit is available at: [UCL Museum Wellbeing Measures | UCL CULTURE - UCL – University College London](#)

<sup>74</sup> The Spotlight on Museums 2020 report does not provide any additional explanation of these numbers.

<sup>75</sup> Available at: [Measuring the public library service: our standards | GOV.WALES](#)

**Table 5.7: Impact of libraries on adults and children wellbeing – descriptive statistics of survey results, 2019/20.**

	Percentage of respondents agreeing with the statements in each local authority			
	Average	Lowest	Median	Highest
a) develop new skills – adults	75%	25%	83%	94%
b) help find things out – young people	90%	60%	93%	97%
c) health and wellbeing information – adults	69%	38%	69%	96%
d) enjoyable, safe, inclusive place – adults	96%	90%	97%	100%
e) made difference to their life – adults	85%	41%	89%	99%

Source: Public Library Service Annual Reports 2019/20

5.27 The data presented in the table highlight that libraries are widely regarded by the majority of individuals as enjoyable, safe, and inclusive spaces that contribute to learning and discovering information. On average, approximately 85% of adults believe that libraries have a positive impact on their lives, while about 3 out of 4 adults reported that libraries have aided them in acquiring new skills. The perception of libraries as reliable sources of information for health and well-being exhibits the lowest level of agreement among respondents.

### **Contribution to the economy**

5.28 The DCMS Sectors Economic Estimates series<sup>76</sup> have published annually from 2018 to 2021 a statistical release to provide an estimate of the economic contribution of the sectors under its remit, as measured by the gross value added (GVA). GVA measures the contribution to the economy of each individual producer, industry or sector.

5.29 DCMS uses two data sources to provide regional GVA at the subsector level, namely the ONS Regional Gross Value Added balanced tables and the unsuppressed Annual Business Survey (ABS) GVA estimates. In the latest DCMS

<sup>76</sup> Available at: [DCMS Sectors Economic Estimates - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/statistics/dcms-sectors-economic-estimates)

regional GVA statistical release<sup>77</sup>, GVA data for the five cultural subsectors in scope<sup>78</sup> is provided for every year between 2010 and 2019, as shown in the table below.

**Table 5.8: Wales' GVA by cultural subsector, expressed in £ million<sup>79</sup>.**

	<b>Arts</b>	<b>Museums and galleries</b>	<b>Library and archives</b>	<b>Operation of historical sites and similar visitor attractions</b>
2019	£87	£18	£6	c
2018	£85	£18	£7	c
2017	£88	£15	£8	c
2016	£93	£13	£6	c
2015	£112	£16	£6	c
2014	£109	£17	£6	£14
2013	£123	£17	£9	c
2012	£116	£16	£8	c
2011	£88	£18	£11	c
2010	£89	£19	£11	£7

Source: DCMS Sector Economic Estimates

5.30 The arts sector has contributed to the Welsh economy by an estimated £87 million in 2019, followed by museums (£18 million) and libraries and archives (£6 million). Data for the heritage sector is suppressed to avoid disclosure, with the latest figure reflecting a contribution of £14 million in 2014<sup>80</sup>. An observation of GVA figures over time does not suggest any discernible patterns or trends, except for a notable increase in the contribution of the arts sector between 2012 and 2015. However, this increase was followed by a return to pre-2012 levels in 2016 and after.

<sup>77</sup> Available at: [DCMS Sectors Economic Estimates 2019: Regional GVA - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/statistics/dcms-sectors-economic-estimates-2019-regional-gva)

<sup>78</sup> For information about the SIC07 codes that identify the five subsectors in scope see Table 1.1.

<sup>79</sup> The shorthand 'c' denotes data that has been suppressed to prevent disclosure of respondent information.

<sup>80</sup> As in the case of the DCMS employment figure in the Workforce section, the technical note published alongside the regional GVA statistical release specifies that, due to the limitations associated with SIC codes, the figures reported for the heritage sector are likely to be an underestimate of this sector's value.



## *Museums*

- 5.31 The Spotlight on Museums 2020 attempts to estimate the contribution and impact of the 85 museums taking part in the survey on their local economy. By using the AIM Economic Impact Toolkit 2019<sup>81</sup>, the authors determined visitor expenditure and calculated an estimated total economic contribution of over £134 million<sup>82</sup>. The report defines this number as a baseline conservative figure, as it does not include employment impacts and impacts of spend on goods and services. Furthermore, to avoid making assumptions regarding the breakdown of visitor types, the authors employed a visitor formula that treated all visitors as locals, disregarding the potential higher spending of day visitors or overnight visitors.

## *Heritage*

- 5.32 According to the Valuing the Welsh Historic Environment Economic Impact Technical Report<sup>83</sup> produced by ECOTEC in 2010, the GVA of the 'inner cog' of the historic environment sector<sup>84</sup> amounts to £51.1 million. This figure is substantially larger than the GVA of the heritage sector in 2010 as indicated by DCMS statistics, which amounts to £7 million. At least part of this substantial difference can likely be attributed to the broader range of assets and activities encompassed within the 'inner cog' of the historic environment sector, which extends beyond the scope of what is defined as 'Operation of historical sites and similar visitor attractions' in DCMS statistics.

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<sup>81</sup> Available at: [AIM Report and Toolkit highlights the significant Economic Impact of the Independent Museum Sector - AIM - Association of Independent Museums \(aim-museums.co.uk\)](https://www.aim-museums.co.uk/wp-content/uploads/2019/08/Spotlight-on-Museums-2020-Report-and-Toolkit.pdf)

<sup>82</sup> This figure is not to be compared with the GVA measure for the museum sector provided in the paragraph above. The AIM Economic Impact Toolkit sets out an approach to help museum estimate the economic impact they have on their local economies. Specifically, the Spotlight on Museum 2020 aims to estimate the overall gross impact of visits to Welsh museums in terms of economic contribution. More detail on the steps involved in this estimate are available at: [A153 AIM Economic Impact Toolkit August 2019 230919 CF \(aim-museums.co.uk\)](https://www.aim-museums.co.uk/wp-content/uploads/2019/08/A153- AIM-Economic-Impact-Toolkit-August-2019-230919-CF.pdf)

<sup>83</sup> Available at: [Research | Cadw \(gov.wales\)](https://www.gov.wales/research/cadw)

<sup>84</sup> The 'inner cog' of the historic environment sector has been defined for the purpose of the study to comprise those organisations that can be considered at the core of the historic environment sector (i.e., activities concerned with the protection, enhancement and conservation of the historic environment sector). In particular, the study focuses on the following assets: scheduled ancient monuments / archaeological sites, listed buildings, conservation areas, registered historic gardens/designated landscapes, registered historic landscapes, marine historic landscapes, and museums / heritage centres, where they are located within a historic building/ asset.

## **Promotion of diversity / inclusion and engagement of protected characteristics groups**

- 5.33 The National Survey for Wales ‘results viewer’<sup>85</sup> allows to disaggregate the attendances figures presented in the Users / Visitors / Attendance section according to a series of individual characteristics, including age group, highest educational qualification, household in material deprivation, sex, and Welsh Index of Multiple Deprivation (WIMD).
- 5.34 One particularly interesting aspect of this breakdown is the inclusion of the WIMD. The WIMD is a statistical tool used to measure and understand the levels of deprivation across different areas within the country. It is designed to provide a comprehensive assessment of relative deprivation by considering various factors that contribute to an individual or community's overall wellbeing. These include income, employment, health, education, access to services, community safety and physical environment. Each domain is composed of specific indicators that are assigned different weights based on their relevance to deprivation. These indicators are calculated using a combination of data from various sources, including official statistics and survey data. The WIMD generates a deprivation score for different areas in Wales at a relatively small geographical level, specifically at the Lower-layer Super Output Area (LSOA) level.
- 5.35 The ‘results viewer’ allows to observe the level of engagement in the five culture subsectors by quintile of the WIMD, as shown in the table below.

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<sup>85</sup> The ‘results viewer’ can be downloaded at: [National Survey for Wales: results viewer | GOV.WALES](#)

**Table 5.9: Percentage of respondents engaged in arts and culture across quintiles of the WIMD, by cultural subsector, 2021/22.<sup>86</sup>**

	Q1	Q2	Q3	Q4	Q5
Visited a museum	31%	38%	43%	46%	52%
Used a public library	30%	31%	32%	30%	37%
Used an archive	3%	4%	4%	5%	7%
Visited heritage site	46%	55%	65%	69%	72%
Attended arts events	60%	66%	71%	73%	80%
Participated in arts activities	15%	18%	21%	19%	21%

Source: National Survey for Wales 2019/20

5.36 These figures reveal a clear pattern: across all five subsectors, cultural engagement tends to be lower in more deprived areas of Wales, while consistently increasing with each higher quintile. To illustrate, less than one-third of respondents from the most deprived quintile reported visiting a museum in the past year, whereas over 50% of respondents from the highest quintile have visited a museum. Similarly, the percentage of people visiting heritage sites shows a notable increase, rising from 46% in the most deprived quintile to 72% in the least deprived quintile.

5.37 As specified above, the ‘results viewer’ allows similar analysis by age group, highest educational qualification, household in material deprivation, and sex, for all five culture subsectors. For some, additional breakdowns are possible. Furthermore, for a more extensive analysis, it is possible to request and gain access to the full microdata extracted from the National Survey for Wales. This allows for the breakdown of specific indicators based on the complete set of individual characteristics gathered by the survey.

### *Museums*

5.38 The Spotlight on Museum 2020 report provides results on whether museums had organised targeted exhibitions, events and activities for 14 identified equality areas – 78 museums reported organising such initiatives. Among the seven museums that did not provide anything specific, one was solely an off-site store, while the rest were temporarily closed for refurbishment or other reasons. This indicates that

<sup>86</sup> Q1 represents the most deprived 20% of geographical areas while Q5 represents the least deprived 20%.

nearly all museums made efforts to cater to various groups, including different age-related communities, LGBTQI individuals, Welsh language users and learners, women's groups, diverse religions and belief groups, individuals with disabilities, and Black, Asian, and minority ethnic communities. However, the Spotlight on Museum 2020 report provides the results of the question only in a graphical form that does not allow for the extraction of specific numbers for the purpose of this report.

### *Arts*

5.39 The Arts Portfolio Wales survey aims to gather a diverse range of information pertaining to the representation and inclusion of protected characteristic groups. The most recent data collected by the Arts Council of Wales on these topics cannot be analysed, as it is reported in the Arts Portfolio Wales Survey Highlights 2021/22 in a graphical format that does not allow the extraction of specific numbers. However, detailed figures related to these themes are available for the years 2019/20 and 2018/19 in the dataset titled 'Open Data: Equalities Monitoring Sept 2020'.<sup>87</sup> This dataset offers two sets of relevant indicators:

- The number (and share) of events and participatory sessions organised by Arts Portfolio Wales organisations aimed at engaging specific protected characteristic group.
- The number (and share) of employees and board members of the Arts Portfolio Wales organisations belonging to specific protected characteristic groups.

5.40 The table below provides an example from the first set of indicators, specifically regarding the number of performances at presenting venues aimed at engaging a series of protected characteristics groups.

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<sup>87</sup> Available at: [Open data | Arts Council of Wales](#)

**Table 5.10: Number and share of performances at presenting venues targeting protected characteristic groups.**

Protected characteristic group	Number of performances		Percentage of all performances	
	2019/20	2018/19	2019/20	2018/19
Disabled	80	43	5.4%	2.4%
Non-white	12	33	0.8%	1.8%
LGB	32	43	2.2%	2.4%
Trans	1	9	0.1%	0.5%
Older people	24	31	1.6%	1.7%
Children and young people	252	124	17%	6.9%
Religious beliefs	1	1	0.1%	0.1%
Pregnant women and new mothers	10	0	0.7%	0%

Source: Arts Portfolio Wales Survey

- 5.41 The same figures are available for three other types of arts events – namely, exhibitions, film screenings and performances by touring companies and two types of participatory sessions (those designed for children and young people specifically and those open to the general public).
- 5.42 The following table presents the share of total employees and board members of Arts Portfolio Wales organisations belonging to specific protected characteristics groups.

**Table 5.11: Share of employees and board members belonging to protected characteristics groups.<sup>88</sup>**

Protected characteristic group	Employees		Board members	
	2019/20	2018/19	2019/20	2018/19
Disabled	4.4%	3.2%	6.3%	5.1%
Non-white	4.6%	5.2%	4.9%	4.2%
LGB	7.7%	6.5%	8%	4.8%
Trans	c	c	c	c
Older people	18.7%	21.1%	50.1%	54.6%
Young people	13.5%	n/a	2%	0%
Religious beliefs	15%	17.6%	18.1%	9.3%
Pregnant women and new mothers	1.5%	1.3%	c	c

Source: Arts Portfolio Wales Survey

5.43 In order to fully understand some of these figures, it is important to compare them with the proportions of the total Welsh population who share the same characteristics, although this information is not always readily accessible. For instance, according to the ONS Census 2021, approximately 77,000 Welsh residents (3% of the population aged 16 or over) identified as having an LGB+ sexual orientation ("Gay or Lesbian," "Bisexual," or another minority sexual orientation)<sup>89</sup>. Based on this figure, which is the closest in time to the years covered in the table, it can be observed that there is a high representation of LGB+ individuals among employees and board members of Arts Council Wales organisations. This suggests that the arts sector fosters an inclusive environment for this specific group.

5.44 Concerning attendance to arts events and participation to arts activities, the Wales Omnibus Survey on both adult and children<sup>90</sup> engagement in the arts provides

<sup>88</sup> Data identified by 'c' is intentionally suppressed to prevent potential identification of specific individuals within the datasets.

<sup>89</sup> Figures on this topic for Wales from the ONS Census 2021 are available at: [Sexual orientation and gender identity in Wales \(Census 2021\) | GOV.WALES](#)

<sup>90</sup> Both available at: [Annual Surveys | Arts Council of Wales](#)

breakdowns of attendants to arts events and participants to arts activities by social grade, age and gender.

### *Archives*

- 5.45 The dataset collecting the results of the 2022 survey of UK visitors to archives conducted by CIPFA<sup>91</sup> allows to observe a series of characteristics of survey users, including gender, age, ethnicity and disability. The breakdown of archive users by gender and age is presented in the Users / Visitors / Attendance section of this report, while the percentage of non-white survey users is provided in the following sub-section about representation of Black, Asian, and minority ethnic people.
- 5.46 In relation to archive users with disabilities, the survey findings indicate that only 12.2% of the respondents reported having any long-lasting physical or mental health conditions. The survey also inquired about potential barriers experienced by respondents with disabilities when accessing the service. The results reveal that only 5.4% of respondents with disabilities encountered some barriers, suggesting that Welsh archives are generally accessible venues.

### **Representation of Black, Asian, and minority ethnic people**

- 5.47 Evidence relating to the representation of Black, Asian and minority ethnic people is available only for the arts, archive and heritage sectors.

### *Arts*

- 5.48 As described in the paragraph above, the Arts Council of Wales gathers two sets of indicators regarding the representation of Black, Asian and minority ethnic people in the arts sector, i.e., (i) the number of events and participatory sessions by Arts Portfolio Wales organisations specifically aimed at engaging this group and (ii) the share of non-white employees and board members in Arts Portfolio Wales organisations. The collection of such data occurs annually through the Arts Portfolio Wales survey. However, detailed figures are only available for the years 2019/20 and 2018/19, as the Arts Council of Wales released an open dataset containing information for monitoring equality in the arts sector, sourced from the Arts Portfolio

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<sup>91</sup> Available at: [A range of resources for the record keeping sector — Archives & Records Association](#)

Wales survey and other relevant sources. The two tables below present these metrics.

**Table 5.12: Percentage of events and participatory sessions aimed at engaging Black, Asian and minority ethnic people, by type of event or participatory session.**

Engagement type	Session type	2019/20	2018/19
Events	Exhibitions	9.2%	0%
	Film screenings	1.7%	0.7%
	Performances at presenting venues	0.8%	1.8%
	Performances by touring companies	0.3%	0.1%
Participatory sessions	Children and young people	2.6%	1.8%
	Open access	6.1%	7.9%

Source: Arts Portfolio Wales Survey

5.49 The share of exhibitions aimed at engaging non-white individuals experienced significant growth between the two years, from no exhibitions in 2018/19, to nearly one out of ten exhibitions targeting this demographic in 2019/20. Conversely, there were no substantial changes observed in other types of events and participatory sessions in terms of their focus on engaging non-white participants.

5.50 The following table presents the percentage of Black, Asian and minority ethnic workers among employees and board members in Arts Portfolio Wales organisations.

**Table 5.13: Share of Black, Asian and minority ethnic employees and board members.**

	2019/20	2018/19
Employees	4.6%	5.2%
Board members	4.9%	4.2%

Source: Arts Portfolio Wales Survey

5.51 The ONS Census 2021 indicates that 6.2% of the Welsh population identified in ethnic groups categories other than 'White'. This indicates that non-white people were underrepresented among employees and board members in both 2018/19 and 2019/20.



### *Archives*

- 5.52 The 2022 survey conducted by CIPFA on visitors to UK archives<sup>92</sup> revealed that only 3.4% of individuals visiting Welsh archives identified as non-white. This figure cannot be interpreted by comparing it with the percentage of non-white Welsh residents, as visitors to Welsh archives are not exclusively Welsh residents.

### *Heritage*

- 5.53 The peak season<sup>93</sup> and shoulder season surveys<sup>94</sup> conducted periodically by Cadw reveal the share of non-white visitors to heritage sites, as reported in the table below.

**Table 5.14: Share of non-white heritage visitors in peak and shoulder season.**

	<b>2022</b>	<b>2018</b>	<b>2015</b>
Peak season	3%	3%	4%
Shoulder season	-	5%	4%

Source: Cadw Peak and Shoulder Season Visitor Surveys

- 5.54 As specified in the paragraph above regarding archive visitors, drawing conclusions solely based on a comparison between the percentage of non-white heritage visitors and the share of non-white residents in Wales may not be accurate, as a substantial share of heritage visitors travel from outside Wales.

### **Rural proofing**

- 5.55 Within the scope of this search, there are no data sources providing evidence on the engagement in arts and cultural activities of individuals and communities in rural areas.

<sup>92</sup> Available at: [A range of resources for the record keeping sector — Archives & Records Association](#)

<sup>93</sup> Available at: [Research | Cadw \(gov.wales\)](#)

<sup>94</sup> Available at: [Research | Cadw \(gov.wales\)](#)

## 6. Evidence gaps and limitations

6.1 This section summarises the most relevant gaps and limitations found in the available data for the five cultural subsectors. For each subsector, the main gaps and limitations are outlined in relation to key data sources, as well as for the three main measures – workforce, users/visitors/attendants, and organisations – and the policy priorities. Furthermore, an analysis is provided regarding the main limitations associated with the two cross-sector data sources, namely the National Survey for Wales and DCMS statistics.

### Museums

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#### Gaps and main limitations of key data sources

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Spotlight on  
Museums

- The latest edition of the Spotlight survey<sup>95</sup> had a return rate of 53% on the total estimated number of museums in Wales and 78% on the subset of accredited museums, suggesting this is a representative sample of Welsh museums. However, when observing statistics such as total number of visitors or total number of employees, it must be kept in mind that these figures do not cover the entirety of the museum sector in Wales. This means that, for example, the actual total number of visitors to Welsh museums is higher than the figure provided by the report.
- The Spotlight survey has been conducted every 4 to 5 years since 2002. A higher frequency would be preferable, as well as ensuring that the time in between survey updates is fixed to enable easier comparison of reporting periods.

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Workforce

- No data is available on workforce demographic characteristics and earnings.

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Users / Visitors  
/ Attendants

- No major gaps were identified regarding this topic.

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Organisations

- No data is available on non-accredited museums that are not in the process of obtaining the accreditation, thus a complete picture of all Welsh museums is missing.
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<sup>95</sup> Available at: [Spotlight on museums 2020 | GOV.WALES](#)

Environmental impact and decarbonisation	<ul style="list-style-type: none"> <li>No data was found on this topic within the scope of the search.</li> </ul>
Digitisation and digital skills	<ul style="list-style-type: none"> <li>No data is available on digital skills of the workforce.</li> </ul>
Welsh language	<ul style="list-style-type: none"> <li>No data was found on this topic within the scope of the search.</li> </ul>
Impacts on wellbeing	<ul style="list-style-type: none"> <li>The Spotlight survey includes questions to assess the impact of museums on visitor wellbeing, but only a small subset of respondents reported using the suggested toolkit.</li> </ul>
Contribution to the economy	<ul style="list-style-type: none"> <li>Spotlight on Museums 2020 provides information about the economic impact of museums on local economies, but this information is represented by a single figure (£134 million<sup>96</sup>) related to visitor expenditure, and estimated assuming that all visitors to museums are locals. It would be interesting to see a breakdown of this figure, as well as an estimate of visitor expenditure that considers also non-local visitors (day visitors and overnight visitors). Additionally, it would be informative to know the overall contribution to local economy, including for example the impact on employment.</li> </ul>
Promotion of diversity / inclusion and engagement of protected characteristics groups	<ul style="list-style-type: none"> <li>The National Survey for Wales ‘results viewer’ provides the possibility of breaking down the attendance indicator by three protected characteristics, namely age, sex and disability (e.g., % of female respondents that visited a museum at least once in the previous year vs. % of male respondents in the same category). The other 6 protected characteristics are not covered.</li> <li>The Spotlight survey gathers data on museums that addressed equalities through targeted exhibitions, events and activities. However, the data are presented in the report in a graphical form that does not allow to extract specific figures.</li> </ul>
Representation of Black, Asian	<ul style="list-style-type: none"> <li>The Spotlight survey collects data on museums that organised exhibition, events and activities aimed at</li> </ul>

<sup>96</sup> This figure is estimated through the [AIM Economic Impact Toolkit 2019](#) and is not meant to be compared with the GVA figure for the museum sector provided by DCMS statistics. For more details see paragraph 5.31.

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and minority ethnic people	engaging non-white individuals, but the report presents these data in a graphical form that does not allow to extract specific figures.
Rural proofing	<ul style="list-style-type: none"><li>• No data was found on this topic within the scope of the search.</li></ul>

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## Libraries

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### Gaps and main limitations of key data sources

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General gaps	<ul style="list-style-type: none"><li>• No systematic data collection is conducted on non-public libraries (i.e., libraries that are not managed by local authorities). According to CILIP Cymru visual dataset of libraries in Wales<sup>97</sup>, non-public libraries account for over 26% of total libraries.</li></ul>
Public Library Service Annual Reports	<ul style="list-style-type: none"><li>• The most recent Public Library Services Annual Reports<sup>98</sup> – which were submitted by all local authorities in compliance with the Welsh Public Library Standards 2017-2020<sup>99</sup> – provide information on the year 2019/20. Subsequently, due to the Covid-19 pandemic and the resulting closure of public libraries and service disruptions, it was not feasible to proceed with the usual annual reporting exercise for the following year. Instead, a special report encompassing all local authorities has been released for the 2020/21 period.<sup>100</sup> This revised report focuses more on gathering qualitative information and the experience of library customers. The data in this report cannot be directly compared to previous years.</li></ul>
A study of the UK information workforce	<ul style="list-style-type: none"><li>• The 2015 study conducted by CILIP and ARA on the information workforce in the UK<sup>101</sup> provides data on the earnings and job status of library workers. However, the 2023 edition of the same report<sup>102</sup> presents the data collected from the new survey in a manner that does not allow for the observation of specific figures related to the library sector in Wales. In this edition, the data is broken down either by sector or by region, but never both simultaneously, making it impossible to understand the size of the Welsh library workforce.</li></ul>

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<sup>97</sup> Available at: [Libraries in Wales - CILIP: the library and information association](#)

<sup>98</sup> Available at: [Public library service annual reports 2019 to 2020 | GOV.WALES](#)

<sup>99</sup> Available at: [Measuring the public library service: our standards | GOV.WALES](#)

<sup>100</sup> Available at: [Welsh libraries report: 2020 to 2021 | GOV.WALES](#)

<sup>101</sup> The study is available as 'Workforce report 2015' at: [A range of resources for the record keeping sector — Archives & Records Association](#)

<sup>102</sup> The study is available as 'Workforce Survey 2022' at: [A range of resources for the record keeping sector — Archives & Records Association](#)

Workforce	<ul style="list-style-type: none"> <li>The total number of workers is not available. Even when focusing solely on public libraries, the Public Library Service Annual Reports do not disclose the exact count of paid employees – which they do instead for volunteers. Instead, the reports provide a 'yes/no' indicator for each local authority<sup>103</sup>, which does not allow for the calculation of the total number of workers or FTEs. This prevents an understanding of the actual size of the library workforce.</li> <li>No information is available on the demographic characteristics of the workforce.</li> </ul>
Users / Visitors / Attendants	<ul style="list-style-type: none"> <li>No major gaps were identified regarding this topic.</li> </ul>
Organisations	<ul style="list-style-type: none"> <li>CILIP Cymru visual dataset of libraries in Wales provides a somewhat comprehensive list of public and non-public libraries in Wales, along with their geographic coordinates and operators. However, upon comparison with the Public Library Service Annual Reports, it becomes apparent that the list is incomplete. For instance, the CILIP Cymru dataset fails to identify any public libraries under the Swansea Council.</li> </ul>
Environmental impact and decarbonisation	<ul style="list-style-type: none"> <li>No data was found on this topic within the scope of the search.</li> </ul>
Digitisation and digital skills	<ul style="list-style-type: none"> <li>No data is available on the digital skills of library workforce.</li> </ul>
Welsh-language	<ul style="list-style-type: none"> <li>No data is available on the share of Welsh-speaking library workers.</li> </ul>
Impacts on wellbeing	<ul style="list-style-type: none"> <li>No major gaps were identified regarding this topic which could be reasonably addressed.</li> </ul>
Contribution to the economy	<ul style="list-style-type: none"> <li>No data was found on this topic within the scope of the search.</li> </ul>

<sup>103</sup> Specifically, each local authority report whether it achieved total staffing level for the library service of 3.6 full time equivalent (FTE) per 10,000 resident population.

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Promotion of diversity / inclusion and engagement of protected characteristics groups	<ul style="list-style-type: none"><li>• No data was found on this topic within the scope of the search.</li></ul>
Representation of Black, Asian and minority ethnic people	<ul style="list-style-type: none"><li>• No data was found on this topic within the scope of the search.</li></ul>
Rural proofing	<ul style="list-style-type: none"><li>• No data was found on this topic within the scope of the search.</li></ul>

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## Archives

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### Gaps and main limitations of key data sources

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Survey of Visitors to UK Archives	<ul style="list-style-type: none"><li>• No major gaps were identified regarding this data source.</li></ul>
A study of the UK information workforce	<ul style="list-style-type: none"><li>• The 2015 study conducted by CILIP and ARA on the information workforce in the UK<sup>104</sup> provides data on the earnings and job status of archive workers. However, the 2023 edition of the same report<sup>105</sup> presents the data collected from the new survey in a manner that does not allow for the observation of specific figures related to the archive sector in Wales. In this edition, the data is broken down either by sector or by region, but never both simultaneously, making it impossible to understand the size of the Welsh archive workforce.</li></ul>
Workforce	<ul style="list-style-type: none"><li>• The only available information on archive workforce is the distribution of workers across pay bands and job statuses in 2014/15. No data is available regarding the overall size of the archive workforce, as well as the demographic characteristics, skills, and qualifications of the workers.</li></ul>
Users / Visitors / Attendants	<ul style="list-style-type: none"><li>• No data is available on total number of archive users.</li></ul>
Organisations	<ul style="list-style-type: none"><li>• No major gaps were identified regarding this topic.</li></ul>
Environmental impact and decarbonisation	<ul style="list-style-type: none"><li>• No data was found on this topic within the scope of the search.</li></ul>
Digitisation and digital skills	<ul style="list-style-type: none"><li>• No data was found on this topic within the scope of the search.</li></ul>
Welsh language	<ul style="list-style-type: none"><li>• No data was found on this topic within the scope of the search.</li></ul>

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<sup>104</sup> The study is available as 'Workforce report 2015' at: [A range of resources for the record keeping sector — Archives & Records Association](#).

<sup>105</sup> The study is available as 'Workforce Survey 2022' at: [A range of resources for the record keeping sector — Archives & Records Association](#).



Impacts on wellbeing	<ul style="list-style-type: none"> <li>• No data was found on this topic within the scope of the search.</li> </ul>
Contribution to the economy	<ul style="list-style-type: none"> <li>• No data was found on this topic within the scope of the search.</li> </ul>
Promotion of diversity / inclusion and engagement of protected characteristics groups	<ul style="list-style-type: none"> <li>• From the CIPFA Survey of Visitors to UK Archives, data is available on the share of archive users by 5 protected characteristics, namely: age, disability, sex, gender reassignment and race. No data is available about the remaining 4 protected characteristics.</li> <li>• No data is available on initiatives aimed at promoting diversity / inclusion and engaging protected characteristics groups.</li> </ul>
Representation of Black, Asian and minority ethnic people	<ul style="list-style-type: none"> <li>• No data is available on initiatives aimed at promoting the representation and engagement of Black, Asian and minority ethnic people.</li> </ul>
Rural proofing	<ul style="list-style-type: none"> <li>• No data was found on this topic within the scope of the search.</li> </ul>

## Heritage

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### Gaps and main limitations of key data sources

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General gaps	<ul style="list-style-type: none"><li>• There is a lack of systematic data collection on the heritage workforce.</li></ul>
Cadw Visitors Surveys	<ul style="list-style-type: none"><li>• No major gaps or limitations were identified regarding this data source.</li></ul>
Workforce	<ul style="list-style-type: none"><li>• The only available information is the number of workers employed by Cadw, rather than the entire sector. The other figures presented in the table are based on estimates for the whole 'historic environment' sector.</li><li>• No data are available regarding the demographic characteristics, earnings, skills, and qualifications of the workers.</li></ul>
Users / Visitors / Attendants	<ul style="list-style-type: none"><li>• No major gaps were identified regarding this topic.</li></ul>
Organisations	<ul style="list-style-type: none"><li>• No major gaps were identified regarding this topic.</li></ul>
Environmental impact and decarbonisation	<ul style="list-style-type: none"><li>• No data was found on this topic within the scope of the search.</li></ul>
Digitisation and digital skills	<ul style="list-style-type: none"><li>• No data was found on this topic within the scope of the search.</li></ul>
Welsh language	<ul style="list-style-type: none"><li>• No data was found on this topic within the scope of the search.</li></ul>
Impacts on wellbeing	<ul style="list-style-type: none"><li>• No data was found on this topic within the scope of the search.</li></ul>
Contribution to the economy	<ul style="list-style-type: none"><li>• The GVA figure provided by the 2010 ECOTEC report<sup>106</sup> refers to the whole 'historic environment' sector, which has a wider scope than the heritage sector (as defined by the assets and activities under Cadw's remit). Consequently, this figure overestimates the actual GVA of the heritage sector.</li></ul>

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<sup>106</sup> Available at: [Research | Cadw \(gov.wales\)](https://www.gov.wales/research)

<p>Promotion of diversity / inclusion and engagement of protected characteristics groups</p>	<ul style="list-style-type: none"> <li>• The National Survey for Wales ‘results viewer’ provides the possibility of breaking down the attendance indicator by three protected characteristics, namely age, sex and disability (e.g., % of female respondents that visited a heritage site at least once in the previous year vs. % of male respondents in the same category). Additionally, Cadw Visitors Surveys<sup>107</sup> provide age and gender distribution of visitors to heritage sites. The remaining 6 protected characteristics are not covered.</li> <li>• No data is available on initiatives aimed at promoting diversity / inclusion and engaging protected characteristics groups.</li> </ul>
<p>Representation of Black, Asian and minority ethnic people</p>	<ul style="list-style-type: none"> <li>• No data are available on initiatives aimed at promoting the representation and engagement of Black, Asian and minority ethnic people.</li> </ul>
<p>Rural proofing</p>	<ul style="list-style-type: none"> <li>• No data was found on this topic within the scope of the search.</li> </ul>

<sup>107</sup> Available at: [Research | Cadw \(gov.wales\)](https://www.gov.wales/research)

## Arts

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### General gaps and main limitations of key data sources

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Arts Portfolio Wales Survey	<ul style="list-style-type: none"><li>• The Arts Portfolio Wales survey is the primary source for all workforce-related data in this report and most of the data presented in the</li><li>• Policy Priorities section. It is important to note that all information extracted from the Arts Portfolio Wales survey specifically pertains to the subset of 67 organisations that receive core revenue grant funding from the Arts Council of Wales. This survey does not encompass the entire arts sector in Wales, and thus, the data should be interpreted within the context of this limited scope.</li></ul>
Wales Omnibus Survey – Engagement in the Arts	<ul style="list-style-type: none"><li>• No major gaps or limitations were identified regarding this source.</li></ul>
Workforce	<ul style="list-style-type: none"><li>• No data is available on earnings, skills, and qualifications of the workforce.</li></ul>
Users / Visitors / Attendants	<ul style="list-style-type: none"><li>• No major gaps were identified regarding this topic.</li></ul>
Organisations	<ul style="list-style-type: none"><li>• The number of organisations in the arts sector in Wales – defined as ‘Arts’ sector by DCMS as part of its ‘Cultural Sector’ – is not available. For a detailed discussion of the question see paragraph 4.10.</li></ul>
Environmental impact and decarbonisation	<ul style="list-style-type: none"><li>• No data is available on the environmental impact of organisations in the arts sector. However, information is provided on some environmental sustainability initiatives adopted by Arts Portfolio Wales organisations, such as the share of organisations that currently possess an Environmental Monitoring System.</li></ul>
Digitisation and digital skills	<ul style="list-style-type: none"><li>• No data is available on digital skills of the workforce.</li></ul>
Welsh language	<ul style="list-style-type: none"><li>• No data was found on this topic within the scope of the search.</li></ul>

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Impacts on wellbeing	<ul style="list-style-type: none"> <li>No data was found on this topic within the scope of the search.</li> </ul>
Contribution to the economy	<ul style="list-style-type: none"> <li>No major gaps were identified regarding this topic.</li> </ul>
Promotion of diversity / inclusion and engagement of protected characteristics groups	<ul style="list-style-type: none"> <li>No major gaps were identified regarding this topic.</li> </ul>
Representation of Black, Asian and minority ethnic people	<ul style="list-style-type: none"> <li>No major gaps were identified regarding this topic.</li> </ul>
Rural proofing	<ul style="list-style-type: none"> <li>No data was found on this topic within the scope of the search.</li> </ul>

### **Cross-sector data sources**

6.2 This section outlines the key gaps and limitations associated with the two data sources that provide information consistently across all five subsectors, rather than focusing on a specific subsector, as the sources included in the previous sections of this chapter. These two sources are the National Survey for Wales and DCMS Sectors Economic Estimates.

#### ***The National Survey for Wales***

6.3 The National Survey for Wales serves as an extremely useful data source, providing insights into the experiences and connections of Welsh citizens with arts and culture. This survey collects data not only on the percentage of individuals engaging with arts and culture across the five subsectors but also on the frequency of engagement, motivations, barriers, satisfaction, and general attitudes towards arts and culture. However, one limitation of this data source is the inconsistency in asking culture-related questions over time and across subsectors.

6.4 For instance, the primary question on attendance (e.g., "Have you visited a museum in the last 12 months?") was asked for all sectors only in 2017/18 and 2019/20. In

2020/21, it was asked again, but solely for museum visits, arts event attendance, and participation in arts activities. Similarly, questions aimed at investigating the main barriers to accessing arts and culture (e.g., "Are there any specific reasons why you didn't visit a museum in Wales in the last 12 months?") ceased to be asked after 2017/18.

- 6.5 To obtain a more comprehensive and timely understanding of Welsh citizens' engagement with arts and culture, it would be beneficial to have a consistent set of questions covering all cultural subsectors and asked annually. Such consistency would enable a more thorough analysis of the data and facilitate better insights into Welsh citizens' engagement with arts and culture.

#### ***DCMS Sectors Economic Estimates***

- 6.6 For the scope of this analysis, DCMS Sectors Economic Estimates present two main limitations:
- The DCMS sectors are categorised using 4-digit SIC07 codes. At this level of granularity, the library and archive sectors are aggregated under the same SIC07 code. This prevents the extraction of sector-specific figures.
  - In both employment and GVA statistics, data pertaining to the heritage sector is often suppressed to ensure the confidentiality of respondent information. As a result, detailed information regarding the heritage sector is not readily accessible.