Museums Galleries Scotland
Supporting Scotland's Museums

Survey of Scotland's Museums and Galleries

Carried out by DC Research Ltd on behalf of Museums Galleries Scotland

Executive Summary – November 2022

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EXECUTIVE SUMMARY

Introduction (Section 1)

Museums Galleries Scotland (MGS) commissioned DC Research to provide support for the National Survey of Scotland's Museums and Galleries – a sector-wide survey of all museums and galleries in Scotland.

The survey was implemented as an online survey, distributed to the list of museums and galleries held by MGS which, in mid-2022, consisted of 287 museum organisations.

The survey received a total of 177 replies from different museum organisations - a 62% response rate. These responses provide information about 271 different museum sites, a 60% response rate for museums.

Overview of Museums (Section 2)

Of the 271 museum sites that responded, 50% are Independent museums, 31% are ALEO/Local Authority museums, 11% are Organisations with a national remit, 6% are University and 3% are Military.

37% report that their museum site is not located in a listed building, whilst 36% are located in a Category A listed building, 22% in a Category B, and 5% in a Category C.

The majority of museum sites are open all year round (61%), with the remainder open on a seasonal basis. When open, most museum sites (78%) are open between five and seven days per week.

The majority of museums (61%) do not charge for admissions at all, 27% charge for general admissions only, 7% charge for both general and specific and the remaining 6% charge for special exhibitions only.

At the organisation level, most respondents (75%) were Independent museums, followed by ALEOs/Local Authorities (14%) and University museums (5%). Military museums account for 4% and Organisations with a national remit make up the final 2%.

At the current time, one-tenth (10%) of respondents report that they have venues that are at risk of closure.

Finances (Section 3)

Total income/operating budget for respondents varies notably. 28% have a total income of less than £25,000, which accounts for 0.3% of total income. Conversely, those with a total income/budget in excess of £2.5 million per year account for 73% of total income but just 6% of responses.

Core grants account for the vast majority of income from all respondents, forming 69% of total income. This is followed by external project funding, which accounts for 12%.

Excluding all Organisations with the national remit, core grants still account for the largest proportion of income (52%), followed by external project funding (20%) and admissions income (7%). The change between these two sets of results shows the extent to which core grants form the majority of income for Organisations with a national remit.

Looking at Independent museums only, core grants remain the largest source of income (31%) but this is markedly lower than for other parts of the sector, with external project funding accounting for 27% of income, and admissions income accounting for around 1 in every 8 pounds of income.

If results for ALEOs/Local Authorities only are considered, core grants account for the overwhelming majority of income at 84%.

Local Authorities are the most commonly reported provider of core grants, providing a core grant to 56% of respondents who receive such a grant.

Comparing current income to pre pandemic levels, the most common response was no change (25%), followed by a decrease of up to one-tenth, reported by 11% of respondents. Reports of a decrease are more common than reports of an increase, with 46% of respondents reporting some level of decrease and 30% reporting any level of increase.

When asked how many months reserves they currently have (i.e., for how many months they could continue to operate based on their current level of reserves), the results show that 12% of respondents have less than three months reserves, 31% of respondents have less than six months reserves, and that 50% of respondents have enough reserves for 6 months or less.

The majority of museums have a forward/business plan (80%), with one-fifth (20%) indicating they do not.

Most respondents do not have a fundraising plan or strategy for their museum (58%).

80% of respondents do not have a fundraising ethics policy, with only one in five (20%) stating that they currently do.

Governance (Section 4)

The most common terms of office for board members/trustees are more than five years (41%) and three to four years (40%).

Almost half of respondents (49%) regularly review, and change/appoint new board members, with a further one-third (32%) infrequently reviewing or changing board members.

24% of respondents collect information about demographic characteristics of board members, trustees, or governing body representatives.

45% report that they have specifically recruited governing body representatives to address skills gaps or needs in the museum – most commonly relating to aspects of finance, funding, and fundraising, followed by various management aspects, legal issues, and then marketing.

Just over one in ten (11%) reported that they had specifically recruited governing body representatives to address any particular diversity gaps in the last three years. Most commonly this related to gender (62%) followed by age (38%) and ethnicity (31%).

47% report that they have ongoing issues or gaps with recruiting governing body representatives with three overarching themes reported – specific skills issues; gaps in the diversity of governing body representatives (especially in terms of age); and – notably – general challenges in recruiting trustees, board members, and volunteers.

Paid Workforce (Section 5)

Almost three-quarters of respondents, 74%, report that their museum(s) have paid staff, showing that 26% do not have any paid staff and – it can be assumed – will be entirely reliant on volunteers.

From responses provided a total of almost 2,800 paid jobs were identified. 40% of these roles are full-time positions, 33% are part-time positions, 22% of the jobs reported were unspecified in terms of the type of roles, and 6% are seasonal roles. If the unspecified roles are excluded, full-time positions account for more than half of all jobs (51%), and part-time positions 41%.

Looking at the paid jobs by museum type shows that Organisations with a national remit account for the highest proportion (40%) of the paid jobs, followed by ALEO/Local Authority museums (30%), and then Independent museums (25%).

10% of respondents have only one member of paid staff, and almost one-third (32%) have between 2 and 5 paid staff. At the other end of the scale, 5 respondents have 100 or more paid staff, and account for 56% of the total number of paid staff reported.

A total of more than 200 posts are reliant on time-limited project funding – equating to around 9% of the total jobs for these respondents.

Just over one-third of respondents (37%) collect information about the demographic characteristics of staff.

When respondents were asked, if they had lost staff over the last couple of years, what the key gaps in roles/skills are now, a wide range of different skills were identified in responses, with the most common responses related to curatorial and education gaps as well as manager roles.

The most common qualification is a Degree-level qualification, with 39% of staff having this qualification, followed by those with a postgraduate degree (20%), and then those with National 5 or equivalents (14%).

The majority of museums (70%) have not recruited apprentices within the last five years, with just less than one-third having done so.

In terms of recruitment methods, the most common is the organisation's own website (72%), followed by Facebook (58%) and word of mouth (42%).

The key areas identified as current workforce training priorities included (in order of frequency): various management roles and responsibilities; collections related training; health and safety; digital; customer service/front of house training; first-aid; and equality, diversity and inclusion.

The majority of museums (70%) do not offer internships, and a mixed picture emerges about the nature of the internships offered by the remaining 30%: 38% report all internships are paid, 35% report all internships are unpaid, and 28% provide a mix of paid and unpaid internships.

Volunteers (Section 6)

Volunteers play a critical role in Scotland's museums and galleries. The survey results show that 93% of respondents have volunteers.

A total of 2,958 volunteers are reported in the survey responses. 62% of respondents have 20 or fewer volunteers, 27% have between 21 and 50 volunteers, and 5% have more than 100 volunteers.

Museums report that these volunteers contribute more than 28,500 days per year.

The overwhelming majority of respondents (86%) do not collect information about the demographic characteristics of their volunteers.

Almost one-third (30%) report that they had specifically recruited volunteers to address skills gaps over the last three years. The most common gaps were: maintenance; front of house; collections and conservation; various aspects of exhibitions; and a range of research skills.

The most common current volunteering training priorities reported relate to collections care, conservation and documentation; health and safety; front of house and customer care; issues around the visitor experience (including accessibility, engagement, and care), and various aspects of management.

47% report they have a smaller number of volunteers compared to two years ago. 41% report they have around the same number of volunteers and 12% report having a greater number of volunteers.

Those reporting a change were asked how many more (or less) volunteers they have now compared to before the pandemic, and these results show that the losses far outweigh the gains. When all responses are aggregated, the total change reported was 550 volunteers – 68 gains, and 482 losses - resulting in a net loss of 414 volunteers.

Visits And Visitors (Section 7)

Respondents reported a total of 5.2 million visits in 2021-22, and 12.8 million in 2019-20. These headline results clearly show the impact of the Covid-19 pandemic on visit numbers, with 2021-22 being around 40% of that reported in 2019-20 for comparable organisations.

When asked whether they collect information about visitors, such as home location or demographic information, or type of visitor, responses are equally split with 50% of respondents saying they do collect information about visitors and 50% saying they do not.

Where the type of visitor has been identified by respondents, in 2021-22, 51% of visitors were national, 36% were local and 12% were international. Comparable results for 2019-20 show that 38% were national, 34% were international and 28% were local.

Comparing these two sets of results shows the relative shift there has been across the two years. Most notably, the proportion of international visitors has dropped from 34% in 2019-20 to just 12% in 2021-22. Conversely, the proportion of national visitors has increased from 38% to 51% whilst the proportion of local people has increased from 28% to 36%.

It should be noted that this is a relative shift in these proportions, given that reported visit numbers diminished notably between 2019-20 and 2021-22, there are fewer of all types of visitors in 2021-22, including local and national visitors. However, the decrease for international visitors is even greater, resulting in the relative shift from international to local and national visitors.

The survey also asked about the number of attendances from school visits. Once again, the impact of the pandemic is clear. The total number of school visit attendances reported for 2021-22 was just over 28,200. In comparison, the number for 2019-20 was more than 158,000.

Respondents were asked about the number of people engaged with via outreach visits and activities by museums. Almost 26,000 such engagements were reported for 2021-22, whilst more than 72,500 such engagements were reported for 2019-20. Once again, this clearly shows the impact of the pandemic on the ability of museums to carry out such outreach activities.

Just less than half (49%) state that they have specific priority or target groups of potential visitors that they are working to engage with. The most common groups identified were: local groups – including the local community and also local schools; schools; families; young people (with some respondents identifying specific age groups); whilst others identified specific target groups (including some protected characteristics).

Climate (Section 8)

79% of respondents describe climate change and sustainability as critically, very, or moderately important to their organisation.

Museums were asked which activities they were currently measuring regarding climate change and sustainability. Energy use was ranked highest (82%) followed by waste (general) (43%), and then water use (39%).

Museums were then asked which (if any) they were focusing on in terms of reducing their carbon footprint. The same activities emerged as the most common: energy use (83%), waste (general) (47%), and water use (24%).

In terms of the challenges museums face in becoming more environmentally sustainable, the most commonly identified challenge was around financial resources (71% report this as a challenge), followed by staff/volunteer resources (46%), and then time (41%)

When asked what support museums need for this work, the most commonly identified area was capital project funds (68%), followed by resources and good practice sharing (63%). Training opportunities and subject knowledge was the third most common area of support need (47%).

Collections (Section 9)

Almost half (49%) of respondents report that less than 10% of their collection is available online, whilst almost one quarter (24%) report that between 51% and 99% of the collection is available online.

55% of respondents report that they have an agreed plan to increase the proportion of their collections that are available to view online.

Two-thirds (66%) of respondents report that 'most' (54%) or 'all' (12%) of their collections are well documented in terms of provenance. One-third of respondents state that 'some' of their collections are well documented in terms of provenance, with only a very small minority (1.8%) reporting that none of their collections are well documented in terms of provenance.

Just under half of respondents (48%) report that they work to ensure that all communities are represented in their exhibitions. Those that do so reported that the activities used to do so involve proactive work with the relevant community/ies – including outreach activities, community and audience engagement activities, co-production and co-curation, use of social media and local press, consultation events and activities, and gathering feedback from visitors and the community.

Respondents were asked who they had worked with in the last three years to ensure they are represented in exhibitions and the most common group identified were older people (76%), followed by families with young children (69%), and then those of primary age (65%) and secondary age (58%).

Museums were asked to describe the subject specialist knowledge that they have about their collections. The results show that:

- The collections where the highest proportion of respondents report having subject specialist knowledge about the entire collection, are: Archaeology (26%), Social History (24%), Warfare and Defence (22%) and Fine Art (20%).
- If responses indicating subject specialist knowledge about all or most of the collection are combined, the same four types of collections are the most common – Social History (67%), Archaeology (54%) Fine Art (53%) and Warfare and Defence (49%).
- Looking at those respondents reporting not having subject specialist knowledge about any of the collection, the four most common collection areas are: Global Arts, Culture and Design (43%), Natural Sciences (36%), Decorative and Applied Art (34%), and Photography (33%).

Just over one-third (35%) report that they have an active remedial conservation programme, showing that almost two-thirds (65%) do not have one in place at the current time.

When asked if they have preventive conservation measures in place, more than three-quarters of respondents (77%) report that they do.

Museums were asked if they had adequate storage for their collections, and almost two-thirds (65%) report that they do not.

Those that do not have adequate storage were asked to outline the key issues, and these were: a lack of storage space generally; issues with environmental conditions (and management) of current storage; lack of access to/accessibility of current storage facilities; issues with storage of large items; and use of multiple storage spaces that means dispersing the collection across multiple locations.

Social Impact (Section 10)

Almost two-thirds (64%) report that they actively engage in the health and wellbeing agenda.

In terms of activity within the last year, the most common group museums had actively engaged with through targeted programmes was family activities (73%). The next most common was activities with older people (61%), closely followed by people living in deprived areas (58%) and youth engagement (also 58%). The remaining activity area where more than half of respondents said they had carried it out within the last year was people experiencing loneliness and isolation (51%).

Looking over a longer timescale, similar patterns emerge. Combing responses for engagement within the last year and engagement within the last one to two years, this once again shows family activities as the most common (77%), followed by older people (73%) and youth engagement (68%).

Priorities and Challenges (Section 11)

Respondents were asked to identify the funding priorities for their museum(s) over the next three years. The most common funding priorities identified were (with the order reflecting the frequency with which the themes were mentioned by respondents):

- Collections development, collections management, storage of the collections and collections care.
- Dealing with the renovation and repair and upkeep of buildings, especially older buildings.
- Fundings for staffing - both retention of existing staff as well as the recruitment of new staff.
- Exhibitions and funding for the displaying of collections.
- More general concerns around overall funding – and the general financial sustainability and viability of their museums.
- Development of outreach activities and programmes.
- Development of new facilities, or the upgrade of existing facilities.
- Increasing income.
- Digital offer and digitization.

Survey respondents were then asked what (if any) the top three challenges for their museum(s) are at the current time. The responses reinforce the findings about funding priorities, funding is overwhelmingly the key challenge for museums.

In addition to funding-specific challenges, there were other common themes to emerge around the key challenges for museums at the current time (once again, the order reflects the frequency with which the themes were mentioned by respondents): staffing; volunteers; visit numbers; storage; community engagement, school engagement, and outreach; and recruiting and engaging younger people – in volunteering roles or as trustees.

Aggregating Results to Estimate the Overall Sector (Section 12)

The survey results were used as the basis to provide an estimate of the overall sector based on the responses received and aggregating these to the rest of the sector. The specific measures aggregated are visit numbers (for 2019-20); paid staff numbers (currently); and volunteer numbers (currently).

The results show that it is estimated that there were 17.8 million visits to museums and galleries in Scotland in 2019-20.

The results of the aggregation also estimate that there is a total workforce of 8,700 – almost 3,800 paid staff and more than 4,900 volunteers.