

2018 NSW Museum & Gallery Sector Census

Museums & Galleries of NSW Data and Insights - Culture Counts™

377
RESPONDENTS





Michael Parekowhai, *Cosmo McMurtry in Soft Core*, installation view, Bathurst Regional Art Gallery, 2017.

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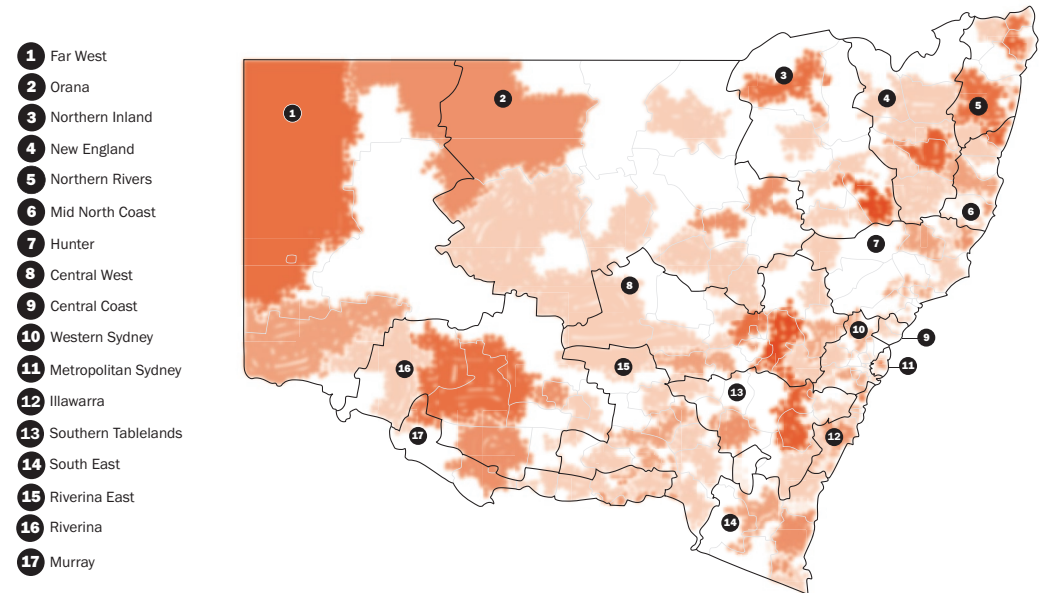
2018 IMAGinE awards at the National Art School. Photo by Tim Da Rin.

1.0 OVERVIEW

The Museums & Galleries of NSW Sector Census survey was sent to 524 organisations which included 337 community run and managed museums, 58 public and regional galleries, 58 public and regional museums, 39 community run and managed galleries and artist run initiatives and 32 Aboriginal cultural centres.

Of these, 377 organisations provided responses. Not all respondents answered every question within the survey and therefore values obtained from organisation filtering throughout this report may not sum to exactly 100%.

The following map shows where respondent organisations were located.



HIGHLIGHTS

Surveyed organisations reported visitor numbers of more than 5 ½ million in 2017.

Respondent museums and galleries directly support 797 equivalent full time employees.

The organisations surveyed reported 8,629 active volunteers giving almost 5 million hours in 2017, worth over \$150 million.*

Organisations reported an average of 10,000 objects per collection across the sector.

* Figure based on wage rates per hour as detailed in *Unpaid Work and the Australian Economy* estimates from ABS data, with increases to account for average wage since 2010, as calculated from *Trading Economics Australia Average Weekly Wages* figures.



Advisor Lynn Collins and Wendy Hawkes at Eskbank House, Blue Mountains

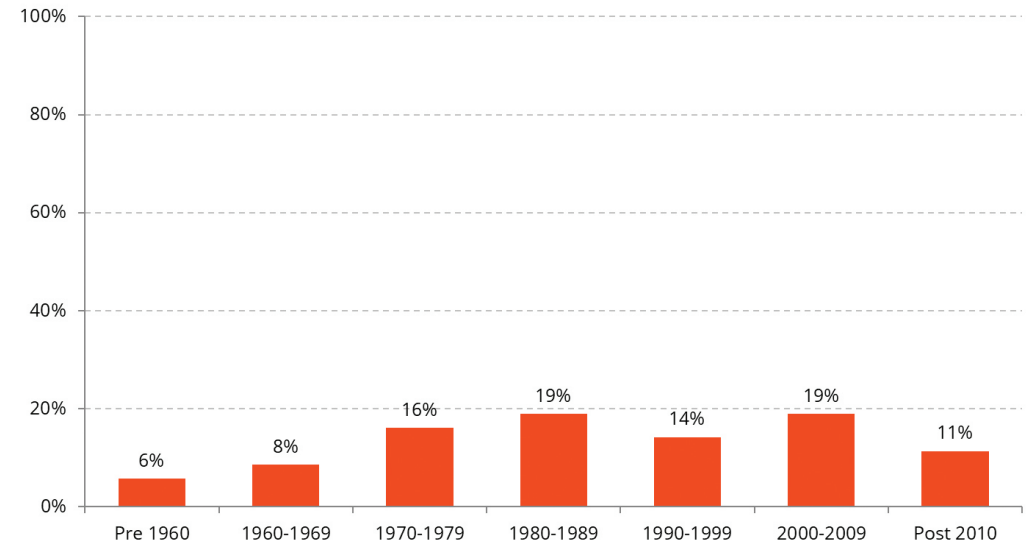
2.0 ORGANISATION

Respondents were asked general questions relating to the background of their organisation including the type, the year they first opened and who owned the building in which they operate.

YEAR OF ESTABLISHMENT

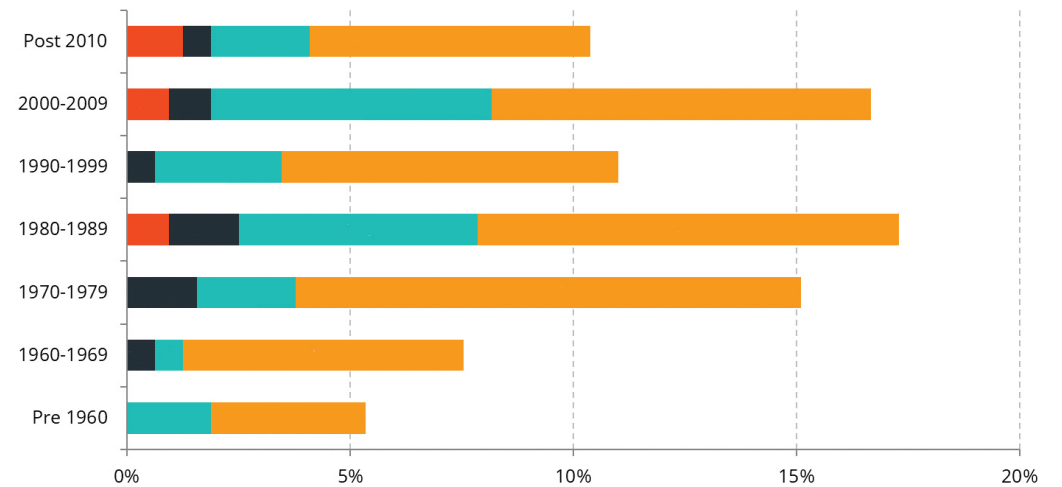
What year did your organisation first open to the public?

Overall



Filtered by organisation type

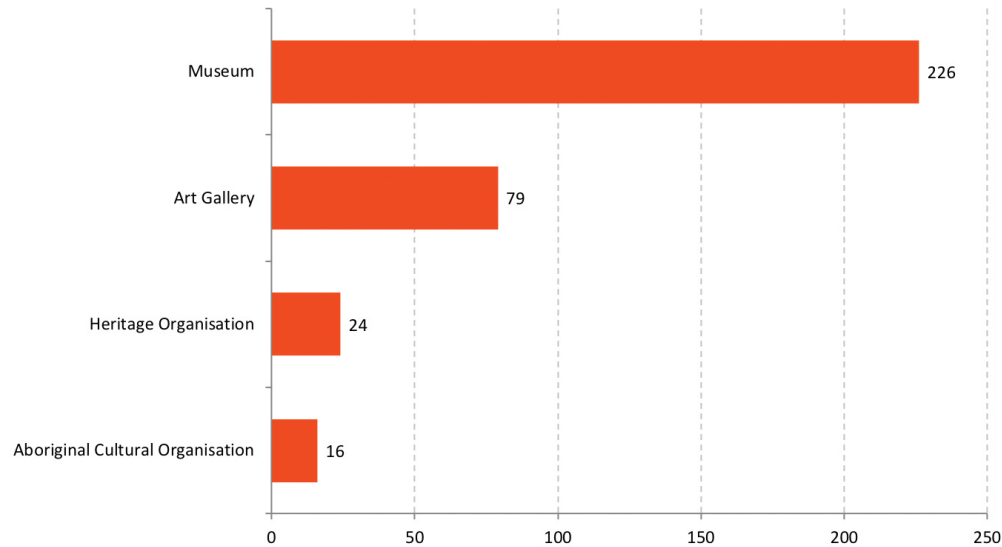
■ Aboriginal Cultural Organisation
 ■ Heritage Organisation
 ■ Art Gallery
 ■ Museum



2.0 ORGANISATION

ORGANISATION TYPE

How would you predominately describe your organisation?



INSIGHTS:

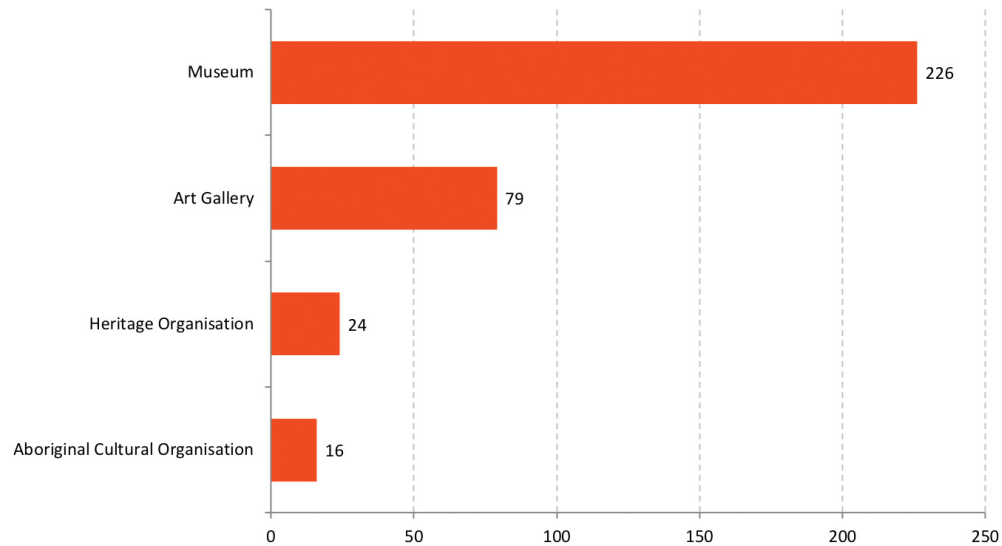
The majority of organisations first opened to the public from 1980 onwards (63%). Art galleries were most likely to open either before 1960 or since the year 2000, with museums opening across all time brackets. No Aboriginal cultural organisations reported opening before 1980.

When asked how organisations would predominately describe themselves from the four main organisation types offered, 66% chose Museum, meaning a place that primarily collects and/or exhibits significant historical objects and artefacts. Just under a quarter chose Art Gallery, meaning a place that primarily collects and/or exhibits visual arts, craft and design, with 7% choosing Heritage Organisation and 5% choosing Aboriginal Cultural Organisation.

Local Government was the most common response when asked about the ownership of the building in which organisations operate. This was followed by organisations owning the building and then, the NSW State Government.

BUILDING OWNERSHIP

Who owns the building your organisation operates from?



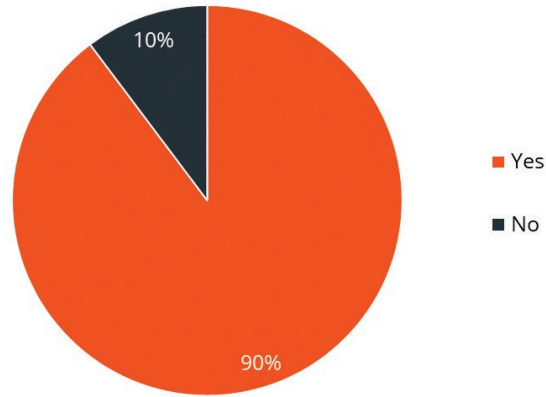
3.0 COLLECTION - Part 1

Respondents were asked to identify if their organisation managed a collection, and were then asked a number of follow up questions relating to their collection type and size.

COLLECTION MANAGEMENT

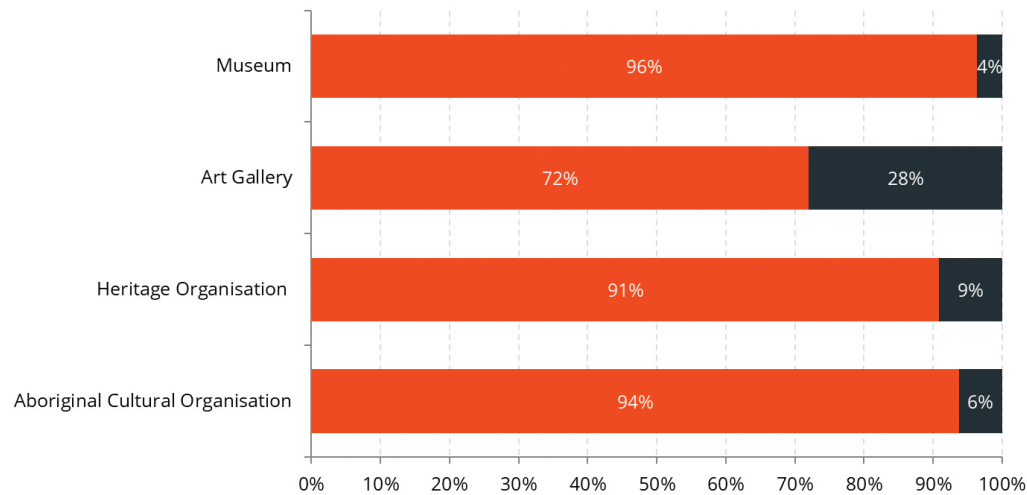
Does your organisation manage a collection?

Overall



Filtered by organisation type

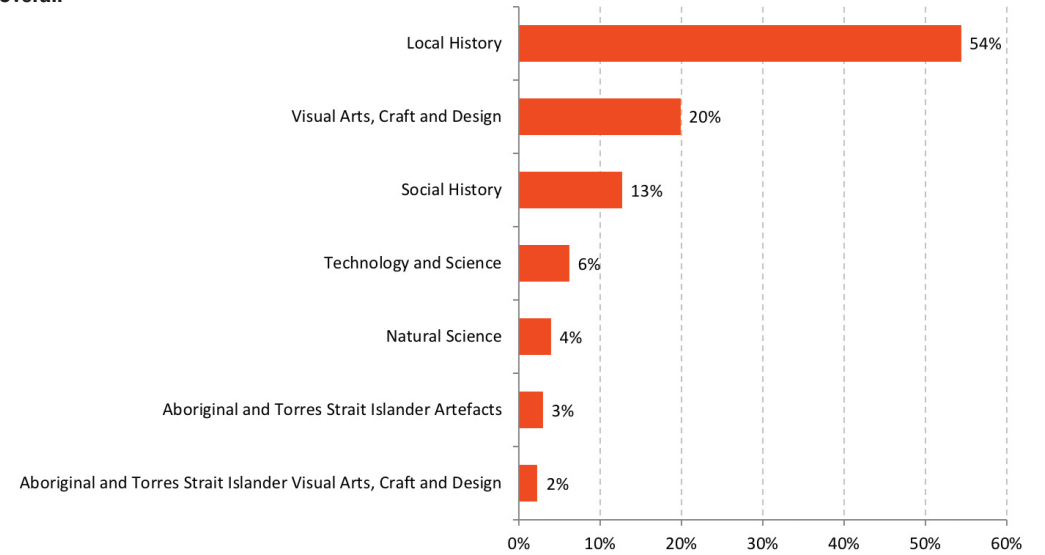
Yes No



COLLECTION TYPE

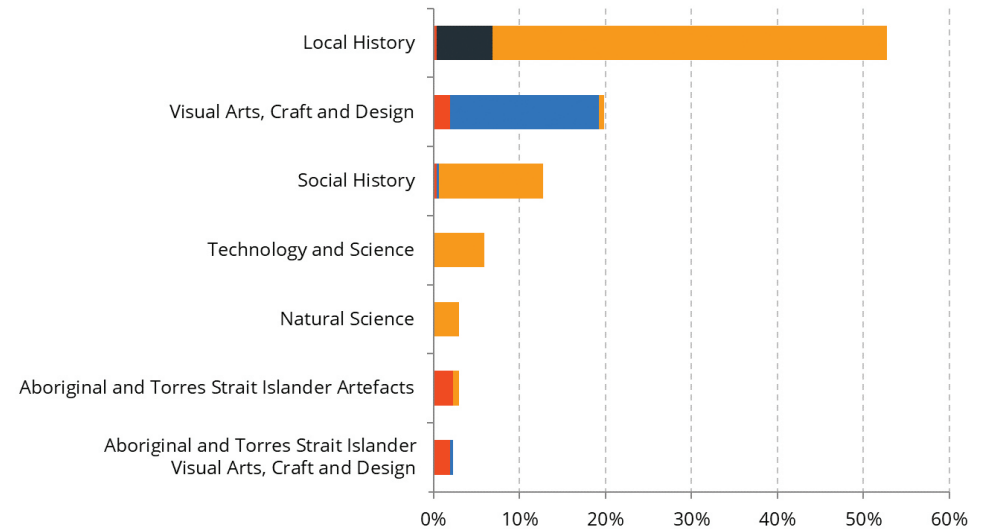
Which one of the following categories best describes your collection/s?

Overall



Filtered by organisation type

Aboriginal Cultural Organisation Heritage Organisation Art Gallery Museum

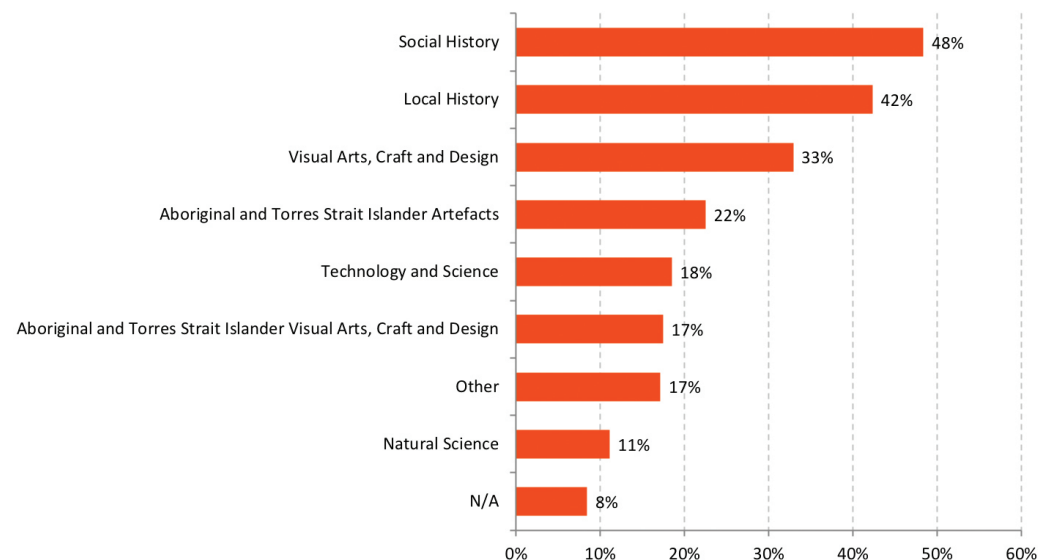


3.0 COLLECTION - Part 1

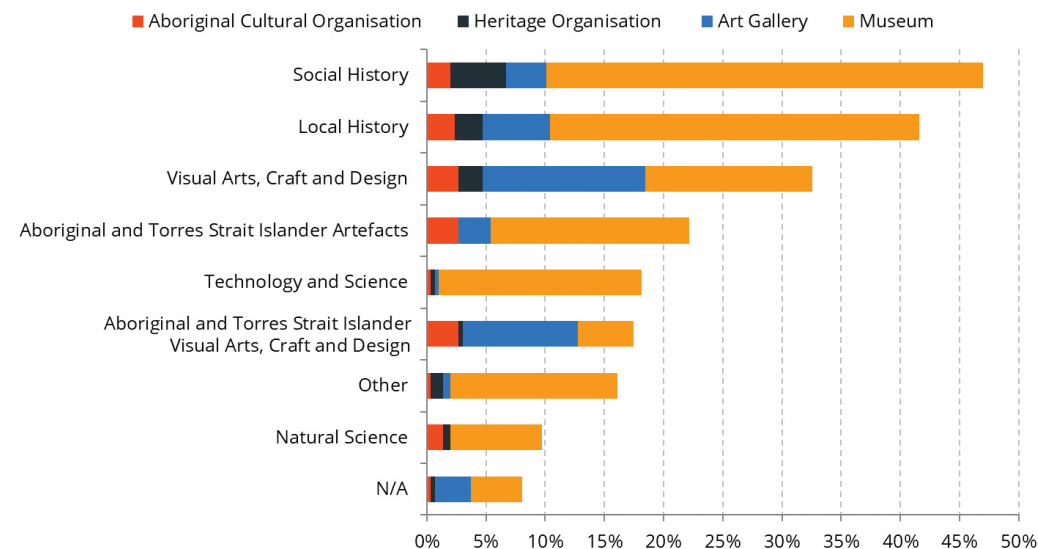
COLLECTION TYPE - ADDITIONAL INFO

Please select any other categories that apply to your collection/s

Overall



Filtered by organisation type



Respondents who selected 'other' were asked a follow up question to specify. Responses included the following categories:

- Antiquities
- Botanical
- Cinema
- Historically significant person
- Industrial and agricultural history
- Local family history
- Medical objects and history
- Military history
- Oral histories
- Period furniture and interiors
- Religious history
- Scientific objects and history
- Sporting objects and history

INSIGHTS:

The majority of surveyed organisations managed a collection (90%). Of these, 54% described their collection as relating to the immediate local history and environment. One fifth of organisations described their collection as visual arts, craft and design and 13% noted it as a social history collection, related to a particular social movement or pastime.

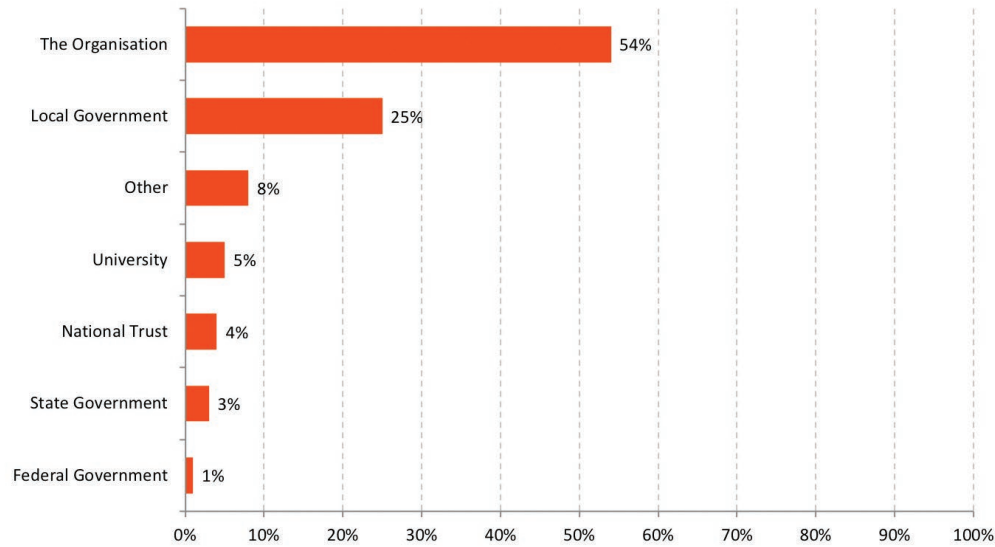
Over 90% of museums, heritage and Aboriginal cultural organisations and just over 70% of art galleries managed a collection. The management of local and social history collections is made up solely of museums and heritage organisations, whilst the majority of visual arts, craft and design collections are managed by art galleries. Social history, local history and visual arts, craft and design, were also the most common responses when organisations were asked if any other categories applied to their collection. For local and social history, the organisation types were relatively similar with the majority being museums. 22% of organisations also identified Aboriginal and Torres Strait Islander artefacts as being part of their collection. This group was primarily made up of museums, but also included art galleries and heritage organisations.

4.0 COLLECTION - Part 2

Respondents were asked additional questions relating to the ownership and management of their collections.

COLLECTION OWNERSHIP

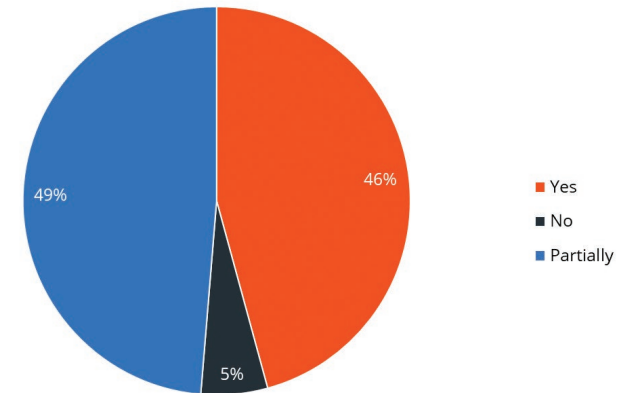
Who owns the collection/s?



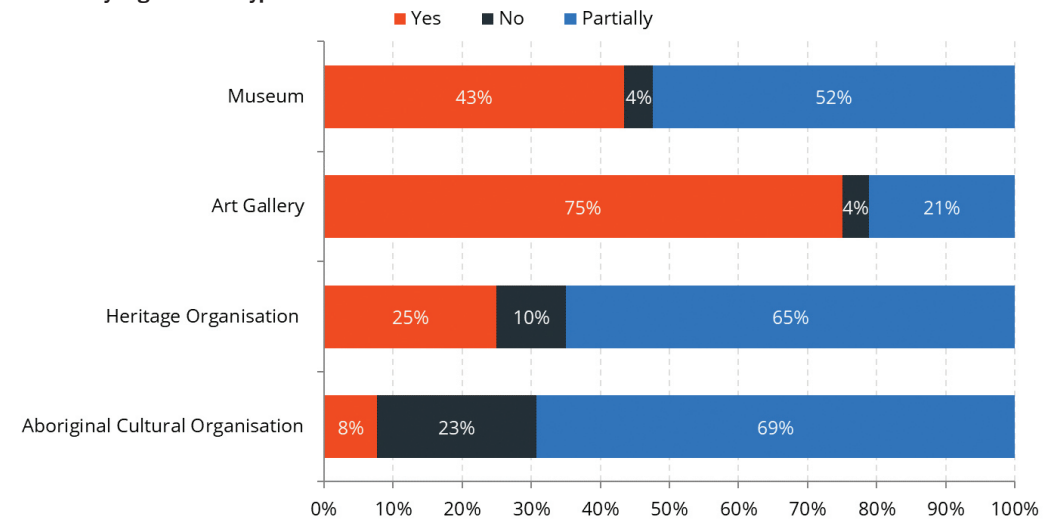
CATALOGUED

Have you catalogued your collection/s?

Overall



Filtered by organisation type

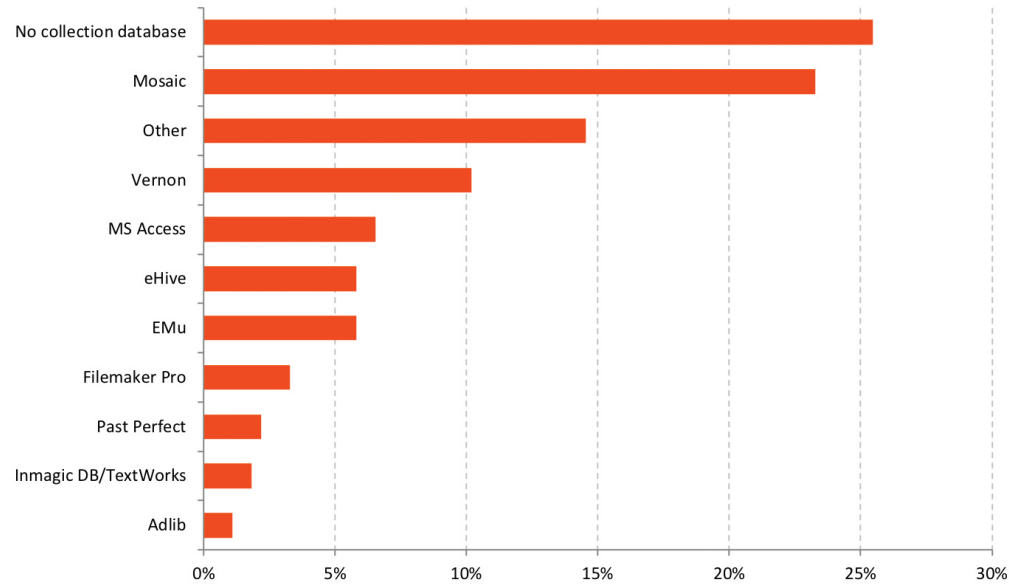


4.0 COLLECTION - Part 2

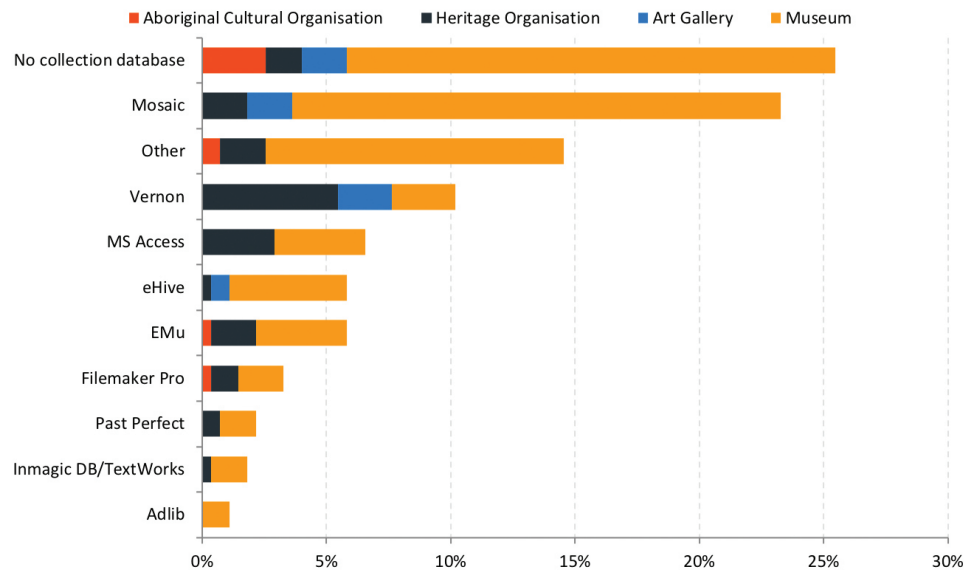
COLLECTION DATABASE

Do you use a collections database?

Overall



Filtered by organisation type



INSIGHTS:

54% of organisations have either not catalogued their collection, or only partially catalogued them. Responses varied significantly by organisational type. Three quarters of art galleries with a collection have catalogued them and a further 21% have partially catalogued them. For museums, approximately half had not catalogued, or only partially catalogued their collections. Aboriginal cultural organisations had the smallest proportion of fully catalogued collections (8%) with 25% of heritage organisations having catalogued their collections.

Of the respondents who manage a collection, 27% of organisations do not use a collections database. The most commonly used database is Mosaic (23%), followed by Vernon (10%) and MS Access (6%). Museums had the highest number of respondents who do not use a database, followed by Aboriginal cultural organisations.

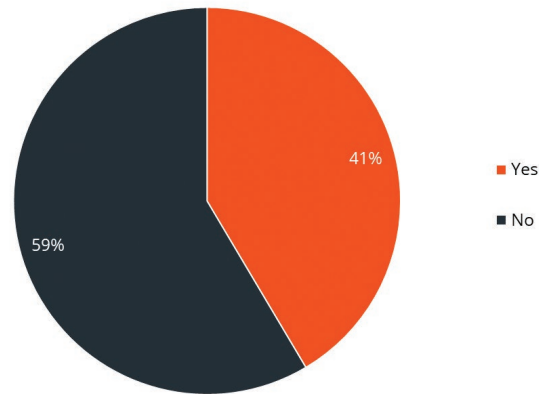
5.0 COLLECTION - Part 3

Respondents were asked more additional questions relating to the size, growth and insurance of their collections.

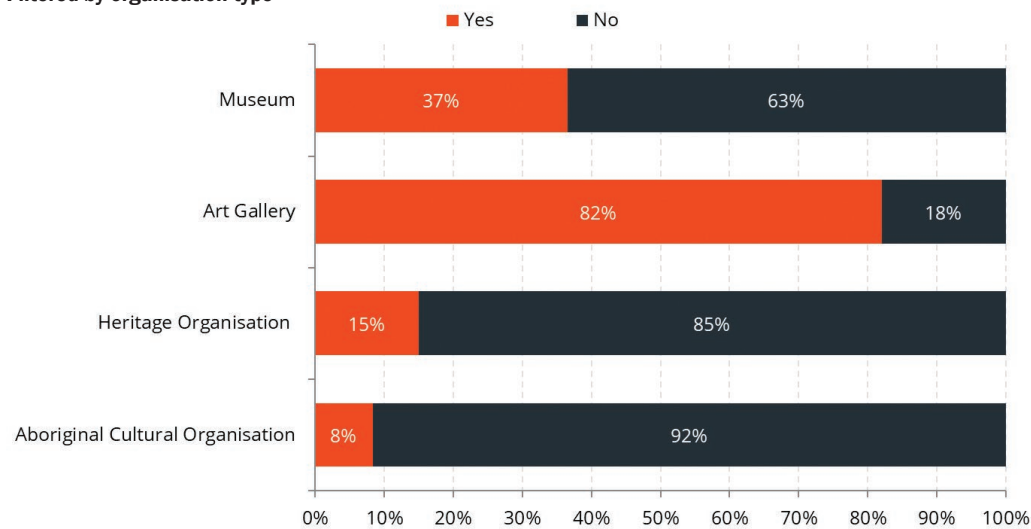
NUMBER OF ITEMS

Do you know the total actual number of items in your collection/s?

Overall

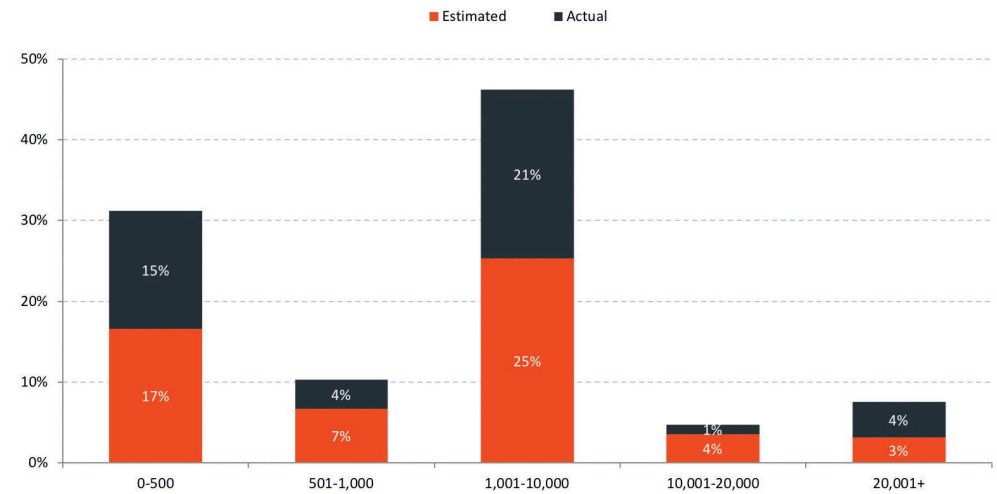


Filtered by organisation type



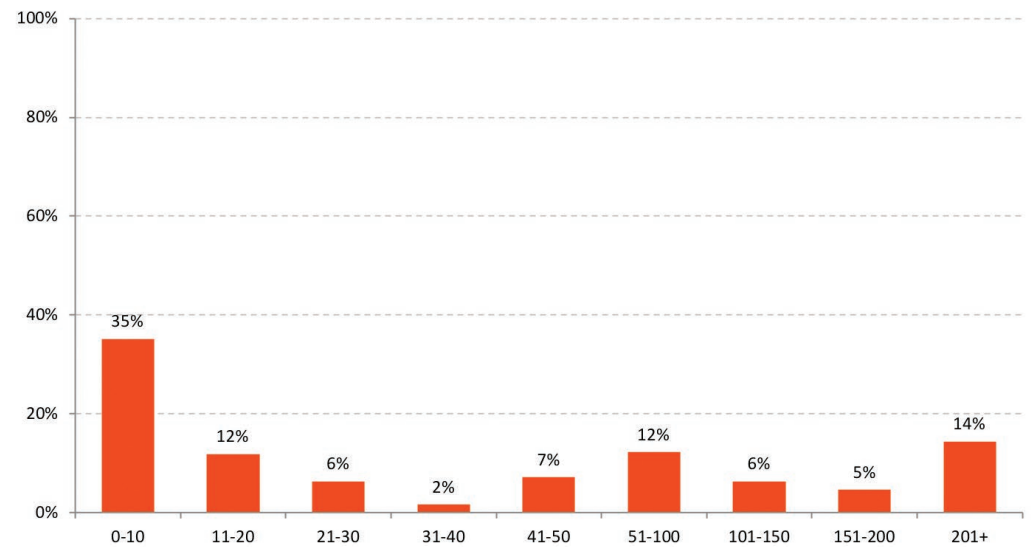
NUMBER OF ITEMS

What is the total number of items in your collection/s? (known/estimated)



COLLECTION GROWTH IN 2017

How many new objects were accessioned or acquired into your collection in 2017?

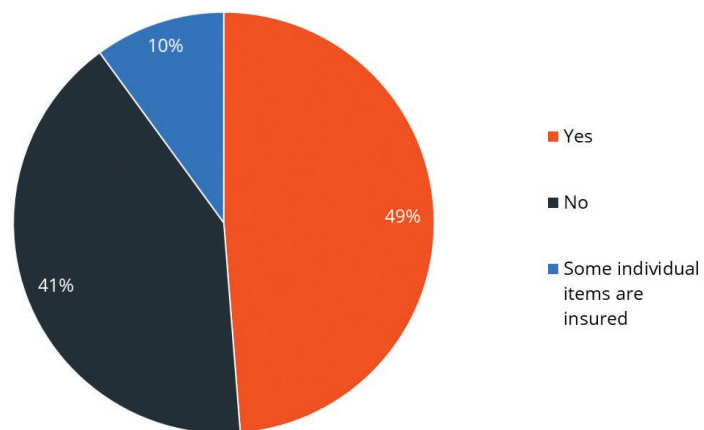


5.0 COLLECTION - Part 3

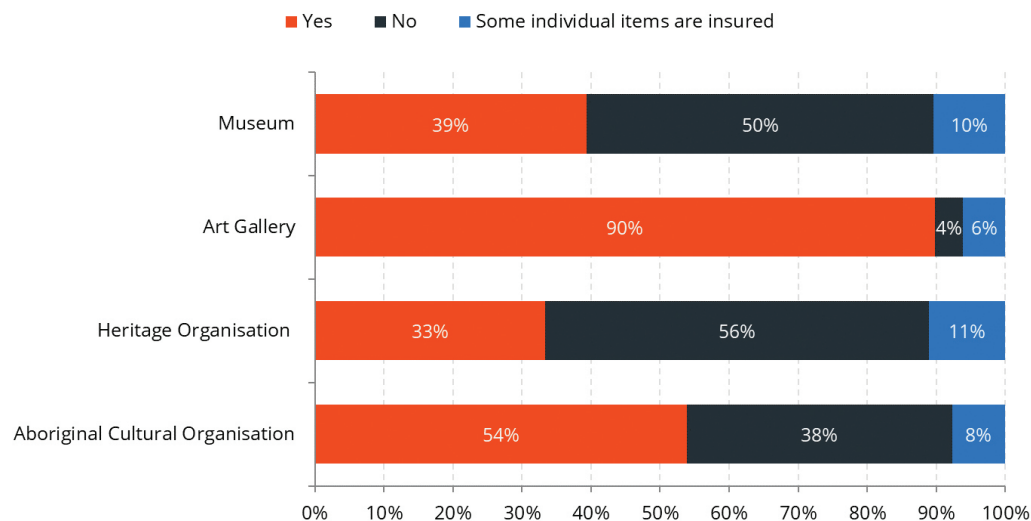
COLLECTION INSURANCE

Is your collection insured?

Overall



Filtered by organisation type



INSIGHTS:

59% of organisations know the actual total number of the items in their collections. Art galleries most commonly knew the number of items in their collections (82%) with Aboriginal cultural organisations the least likely to know (8%).

For organisations with an actual figure for their collection, 15% had less than 500 items, 4% had 501 to 1,000 items, and 21% had between 1,001 and 10,000 items. Numbers were similar for organisations who estimated the number of items in their collection, with 15% having up to 500, 4% having between 501 and 1,000 and 25% having 1,000 to 10,000.

In 2017, for all organisations, it was most common to add between 1 - 10 items to their collections (35%). For 14% of organisations, over 200 items were added in 2017. Approximately half of collections are insured, with 10% of organisations indicating that some individual items in their collections are insured. 90% of art galleries had their entire collection insured. In contrast, 39% of museums and 33% of heritage organisations had whole collections insured.

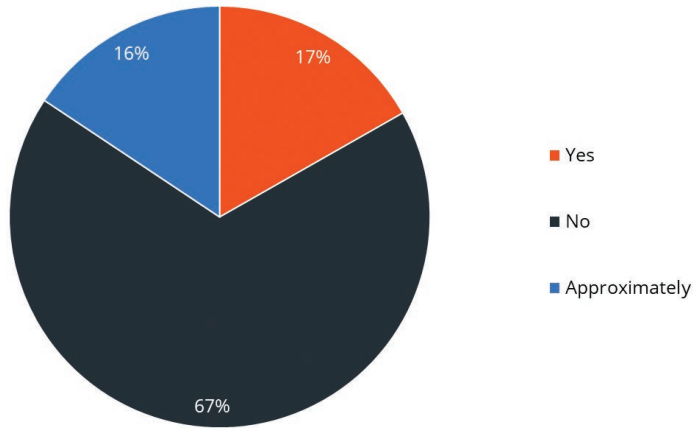
6.0 COLLECTION - Part 4

Respondents were asked about the value of their collections.

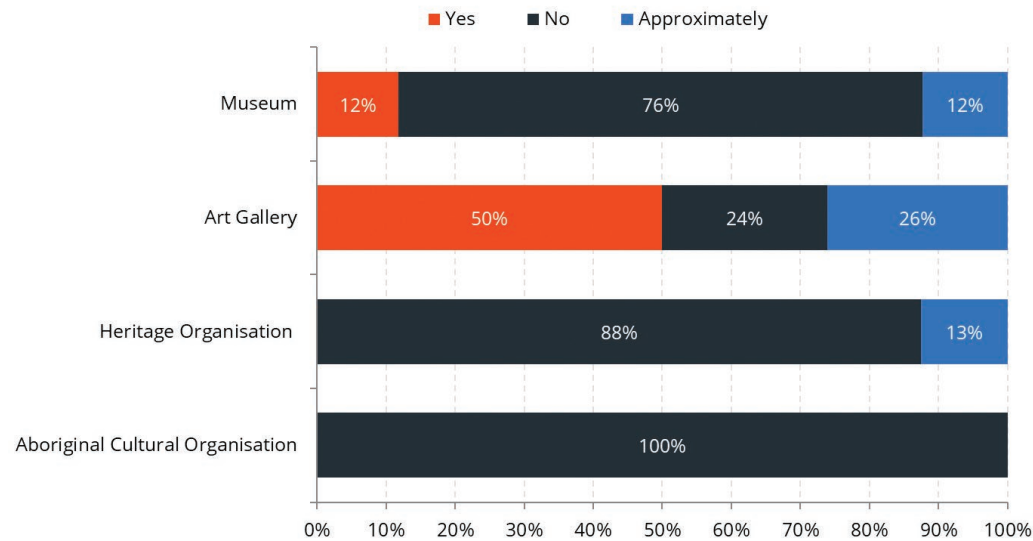
COLLECTION VALUE

Do you know the total \$ value of your collection?

Overall

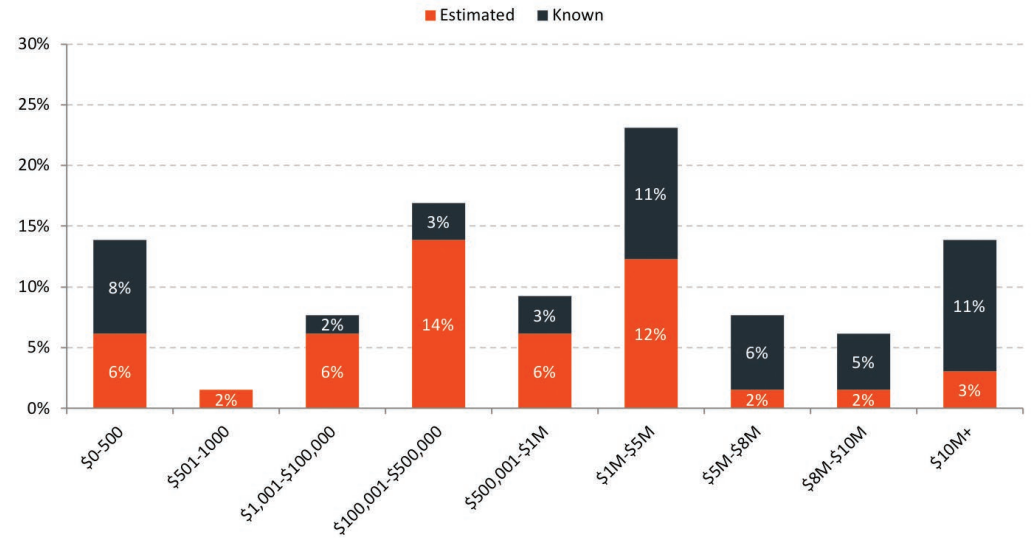


Filtered by organisation type



COLLECTION VALUE

What is the value of your collection (known or estimated)?



INSIGHTS:

The majority of organisations with a collection did not know its total dollar value (67%), only 16% knew the overall approximate value and 17% knew the value in total. When asked to estimate the value of their collections, 18% indicated a value over \$1 million. For organisations who knew the total value, 32% indicated that their collections were worth \$1 million or more.

Half of the art galleries were aware of the total value of their collections, with another 26% being able to estimate the value. No heritage or Aboriginal cultural organisations indicated that they knew the full value of their collections, and only 12% of museums knew the overall total.

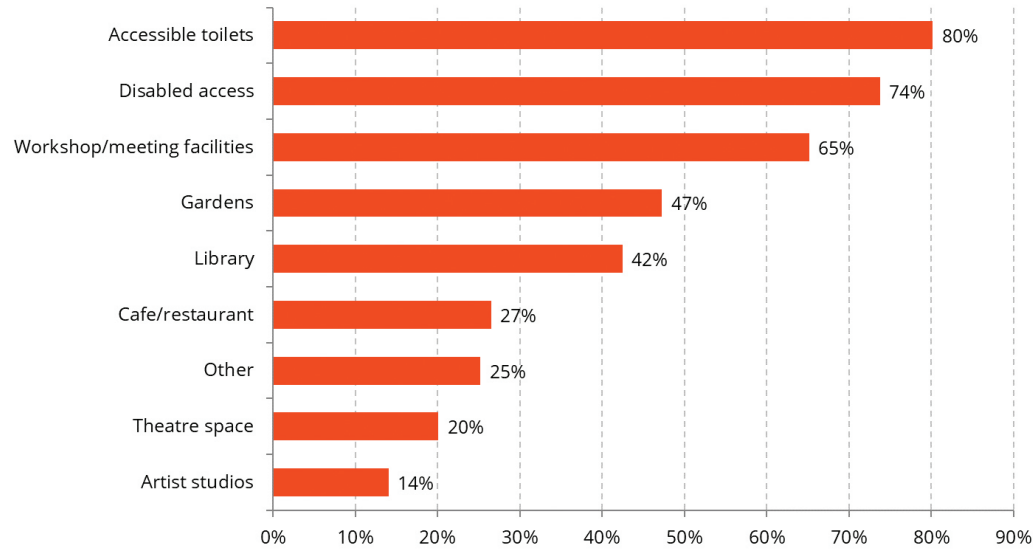
7.0 FACILITIES

Respondents were asked what kind of facilities their organisation had on site.

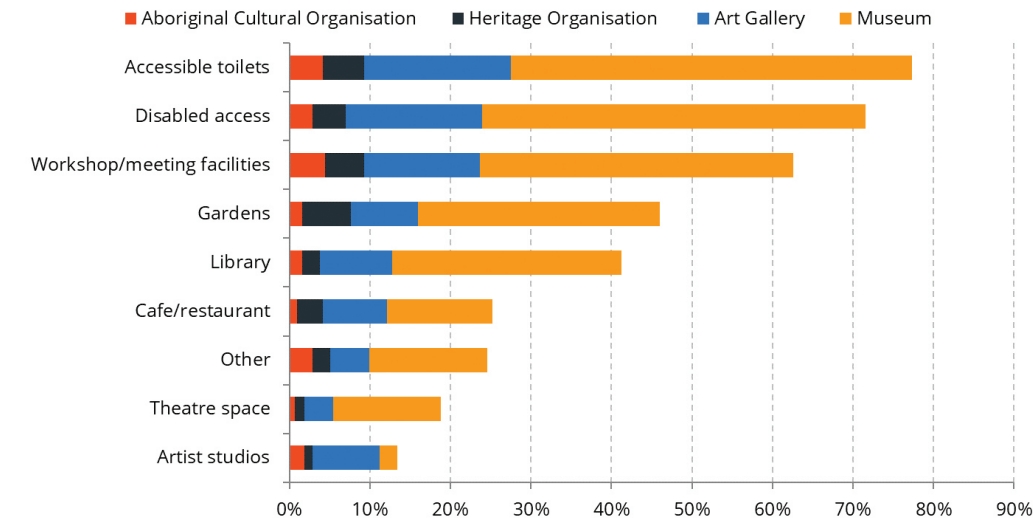
FACILITIES

Which of the following facilities do you have on site?

Overall



Filtered by organisation type



Respondents who selected 'other' were asked a follow up question to specify. Responses included the following categories

- | | |
|------------------|---------------------|
| Accommodation | Off-street parking |
| Archives | Picnic facilities |
| Elevator | Research facilities |
| Kitchen/catering | Retail |
| Office space | Visitor information |

INSIGHTS:

Overall, the majority of organisations reported having accessible facilities such as accessible toilets (80%) and disabled access (74%). 65% of organisations had workshop or meeting facilities on site, and just over a quarter have a café or restaurant. Art galleries and museums made up the majority of organisations with accessible facilities. Not surprisingly, art galleries were also most likely to have an artist studio on site.



Australian Fossil & Mineral Museum

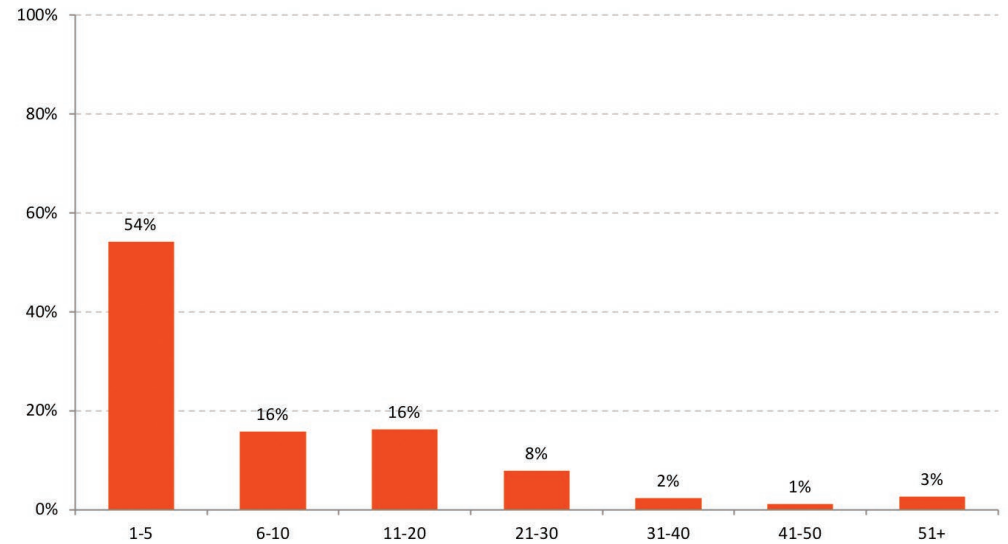
8.0 PROGRAM

Respondents were asked a range of questions about the programming at their organisation.

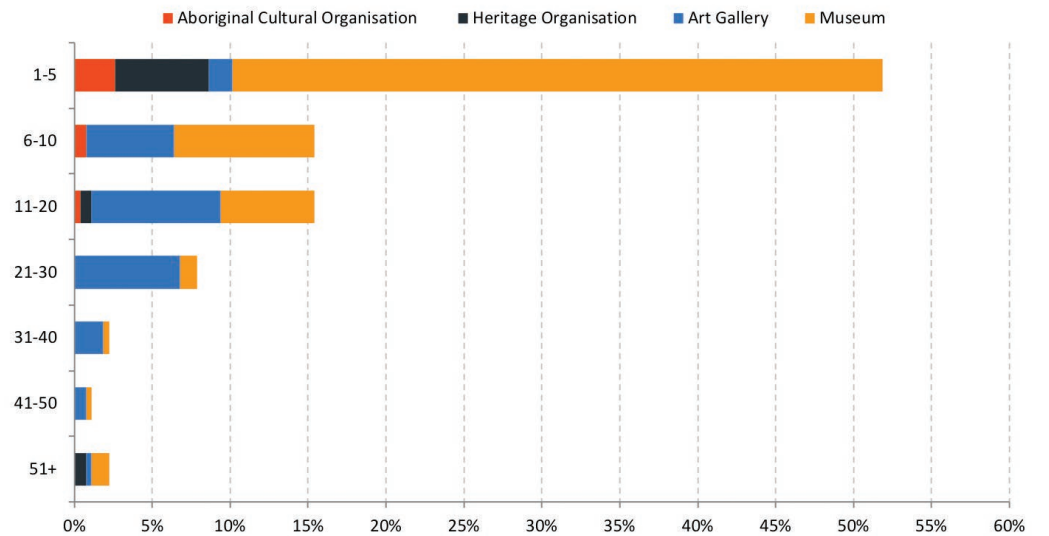
EXHIBITIONS

On average, how many exhibitions do you hold each year?

Overall



Filtered by organisation type

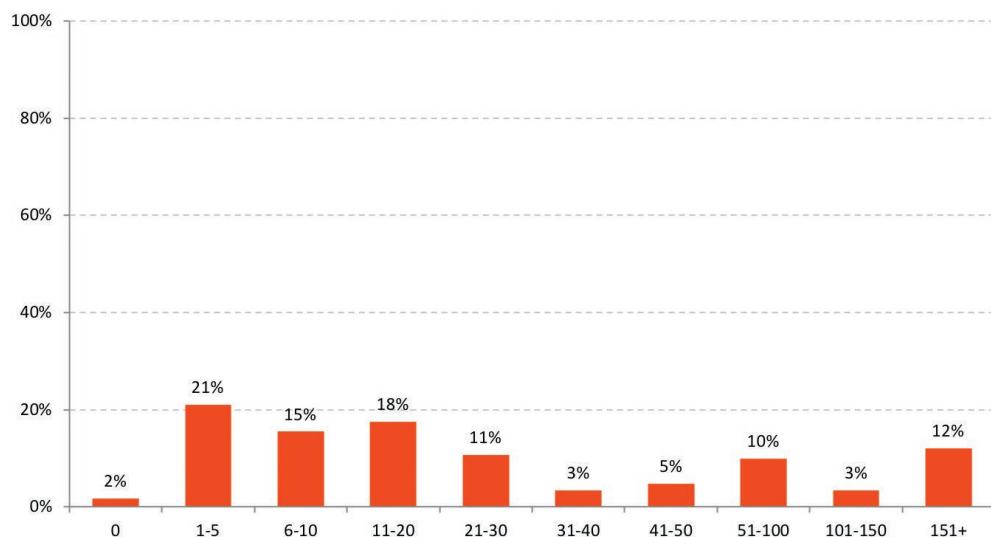


8.0 PROGRAM

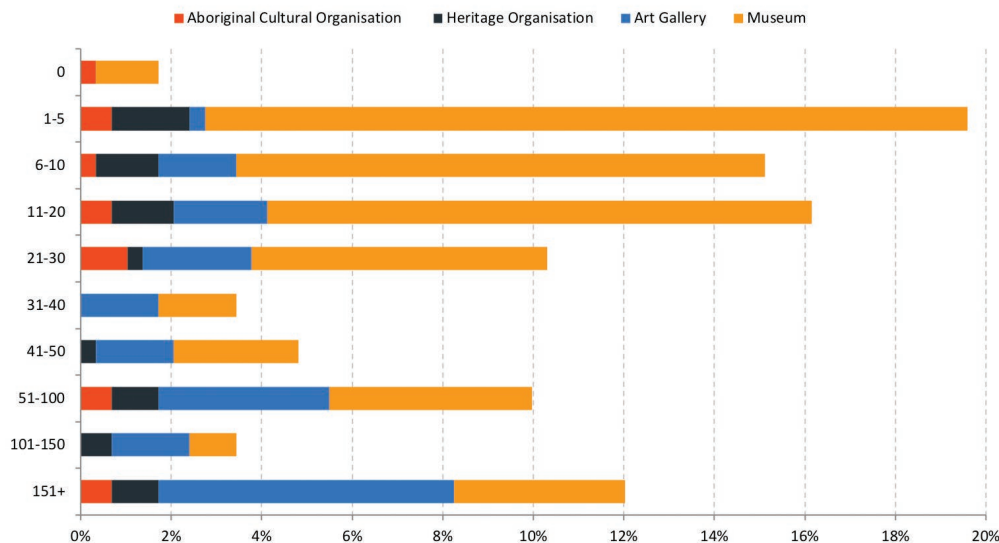
EVENTS

On average, how many events do you run each year?

Overall



Filtered by organisation type



INSIGHTS:

Overall, half of all organisations reported holding between 1 and 5 exhibitions a year and 3% reported holding over 50. It was most common for art galleries to hold more exhibitions over a 12 month period, with museums more likely to hold less. Heritage organisations reported either holding less than 15 exhibitions per year, or that they held a large number of exhibitions, making up 25% of respondents in the over 50 exhibitions range. Aboriginal cultural organisations did not hold more than 20 exhibitions in a year each.

A similar trend appeared for events, with 36% of organisations holding between 1 - 10 events per year, and 12% holding over 150. The number of events varied for each organisation type, with museums most likely to hold fewer than 30 events across the year, with art galleries making up 56% of the respondents in the over 150 events range.



Object labelling and marking workshop. Saumarez Homestead, Armidale

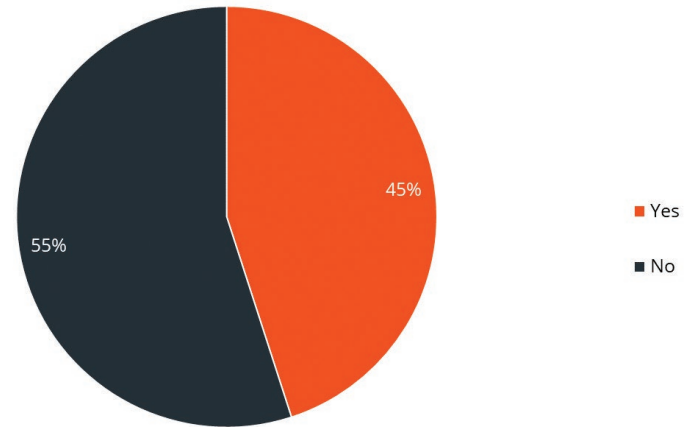
9.0 STAFFING

Respondents were asked a range of questions relating to the staffing at their organisation.

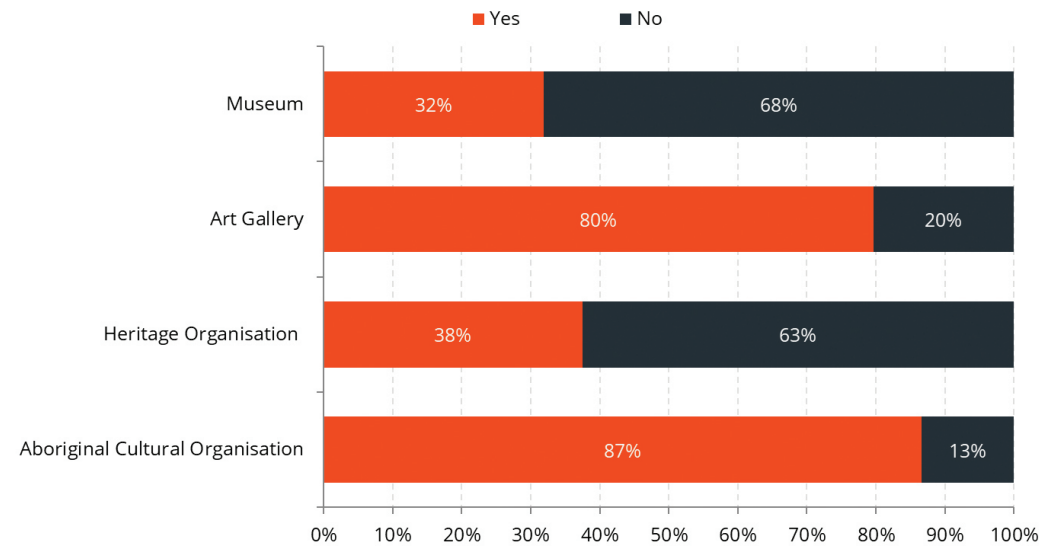
PAID STAFF

Do you have paid staff?

Overall



Filtered by organisation type

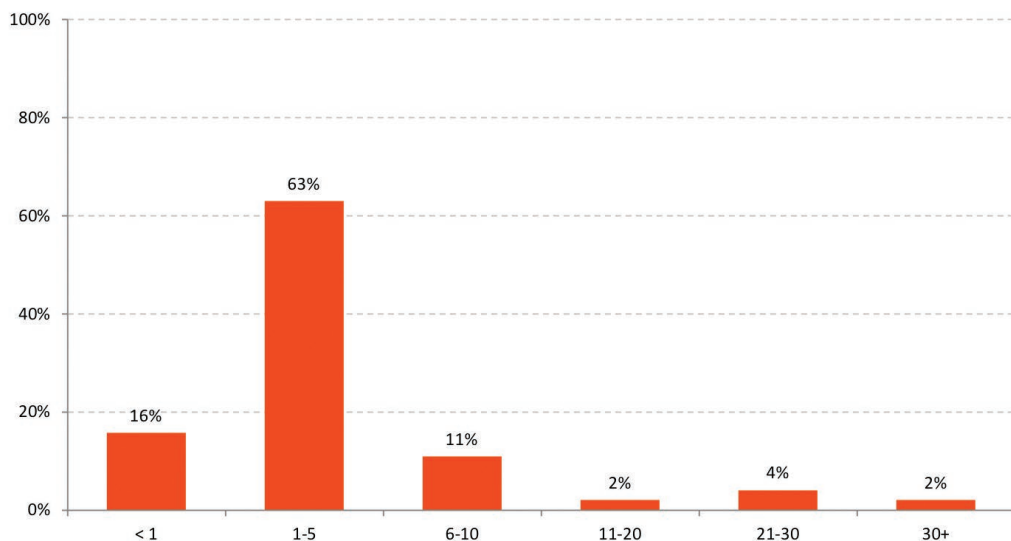


9.0 STAFFING

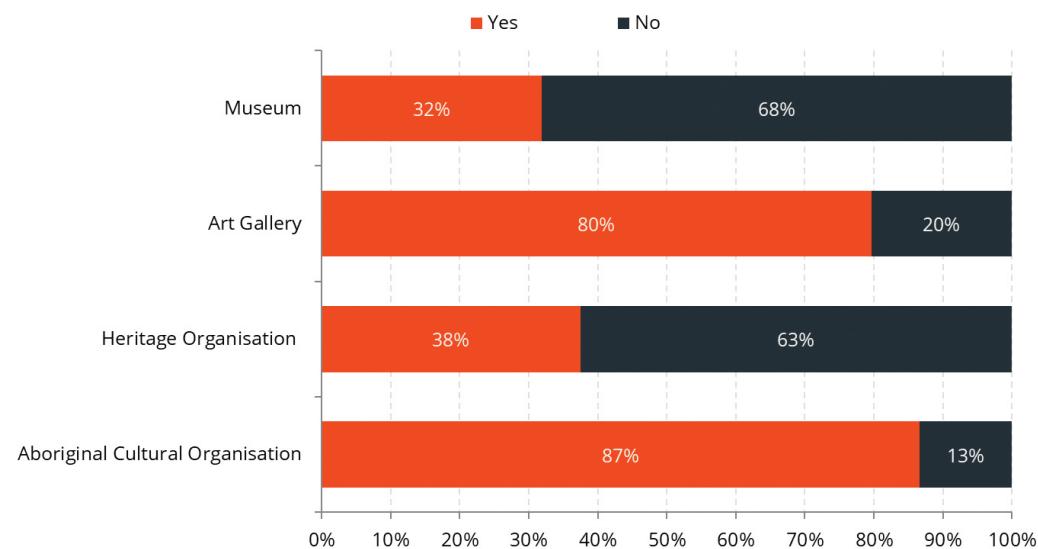
PAID STAFF NUMBERS

How many full time equivalent paid staff do you have?

Overall



Filtered by organisation type



INSIGHTS:

Approximately one third of museums and heritage organisations have paid staff whereas 80% of art galleries and Aboriginal cultural organisations reported paid staff. Overall just under half of respondents have paid staff.

Of the organisations with paid staff, approximately 63% had 1 to 5 staff members, with very few having more than 20. 16% had less than one full time employee. The number of staff members varied across organisational type. No heritage organisations reported having any more than 10 paid staff members.

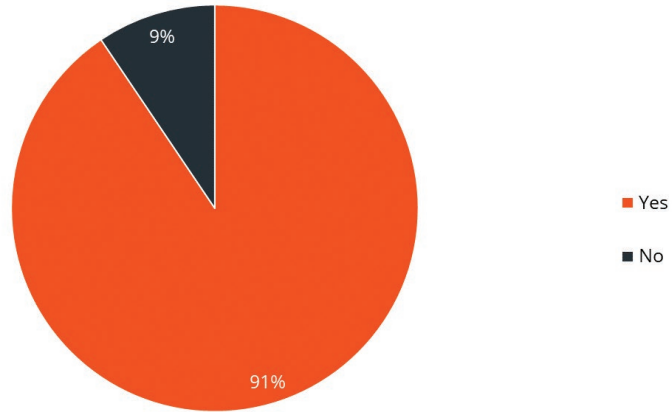
10.0 VOLUNTEERS

Respondents were asked a series of questions about the volunteers at their organisation.

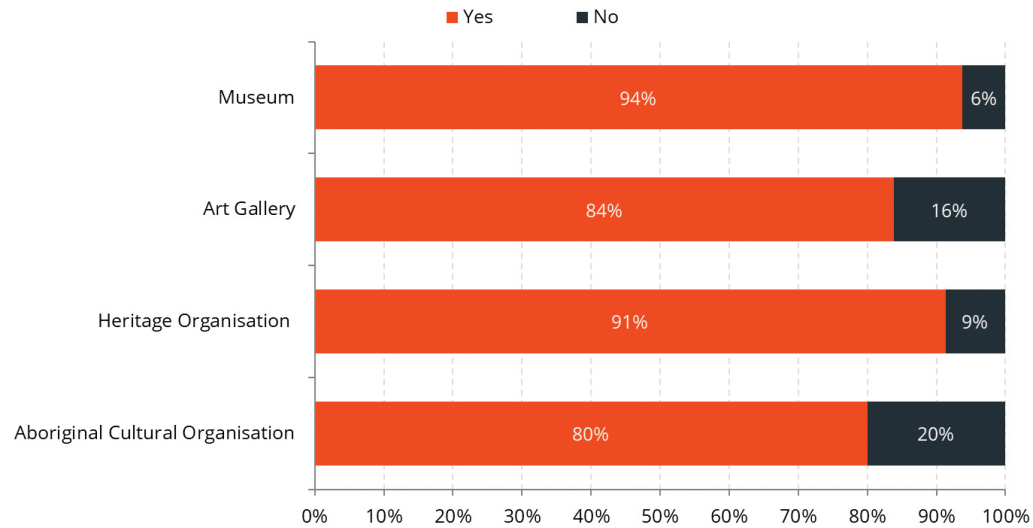
VOLUNTEER PRESENCE

Does your organisation have volunteers?

Overall



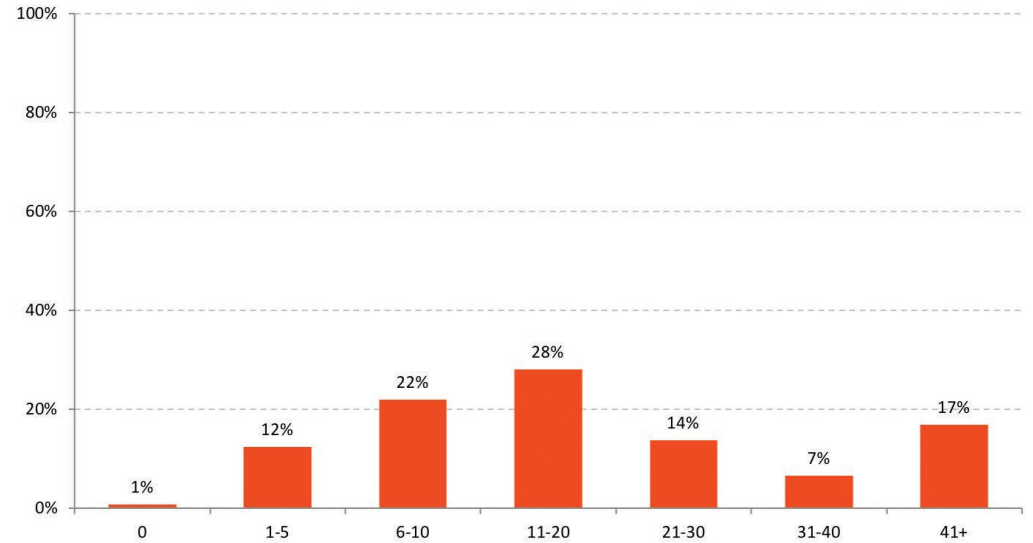
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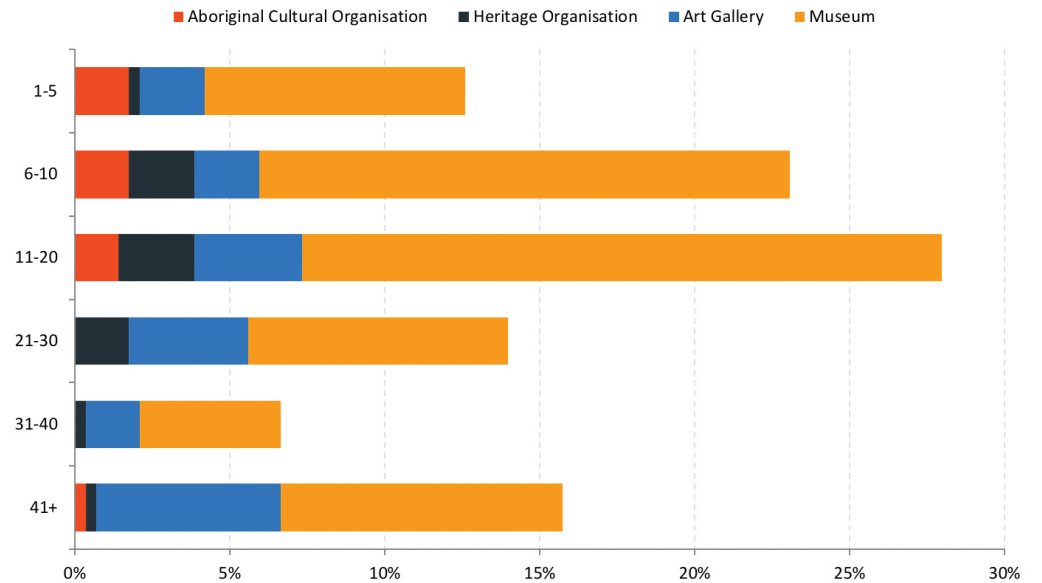
VOLUNTEER COUNT

How many active volunteers do you currently have?

Overall



Filtered by organisation type

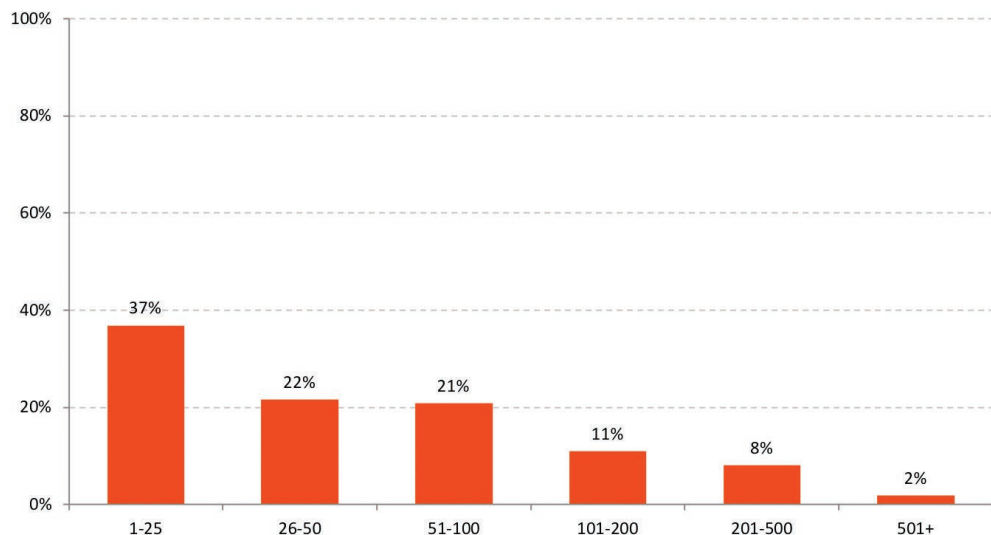


10.0 VOLUNTEERS

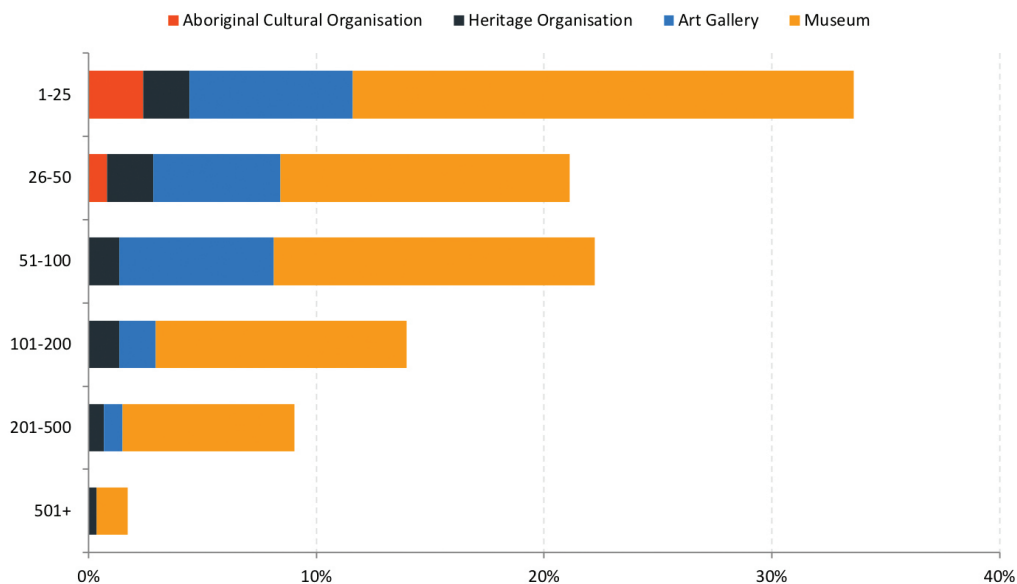
VOLUNTEER HOURS

On average, how many volunteer hours are given each week to your organisation's operations?

Overall



Filtered by organisation type



INSIGHTS:

While the majority of organisations reported having volunteers (90%), it was most common for museums to have volunteers (94%), with a slightly lower figure reported for Aboriginal cultural organisations, at 80%.

Of the organisations with volunteers, it was most common to have either 11 - 20 volunteers (28%), 6-10 volunteers (22%) or over 40 volunteers (17%). These organisations were predominately museums and art galleries, with only a small number of heritage organisations having over 30 volunteers. Aboriginal cultural organisations typically had no more than 20 volunteers per organisation, and the majority of these had less than 5 volunteers.

When asked about average volunteer hours per week, almost 60% of organisations reported less than 50 hours and just under a quarter reported between 50 and 100 hours. Very few organisations reported more than 500 hours per week.



Public Galleries Summit 2018, Carriageworks. Photo by Tim Da Rin

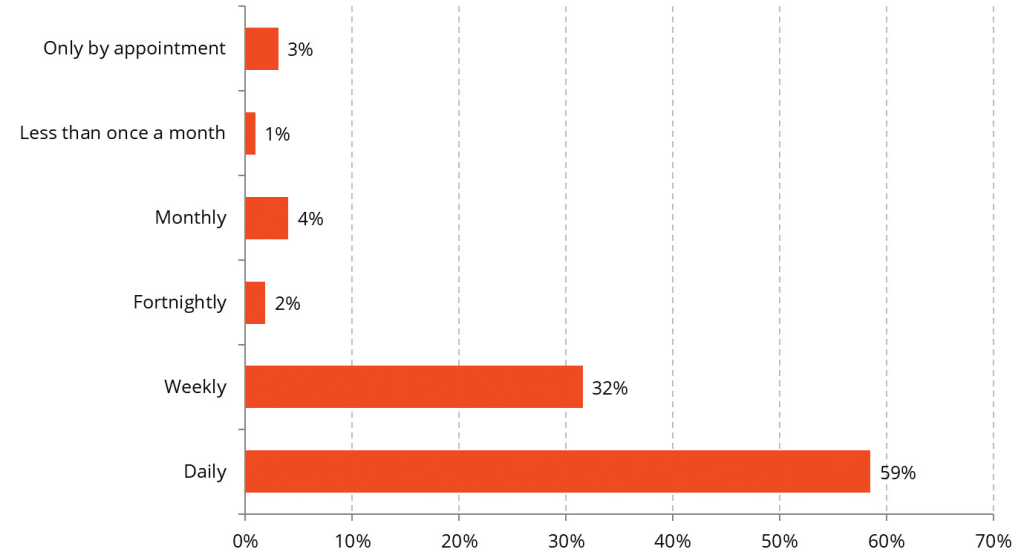
11.0 OPENING HOURS

Respondents were asked about their opening times including which days and what times.

OPENING TIMES

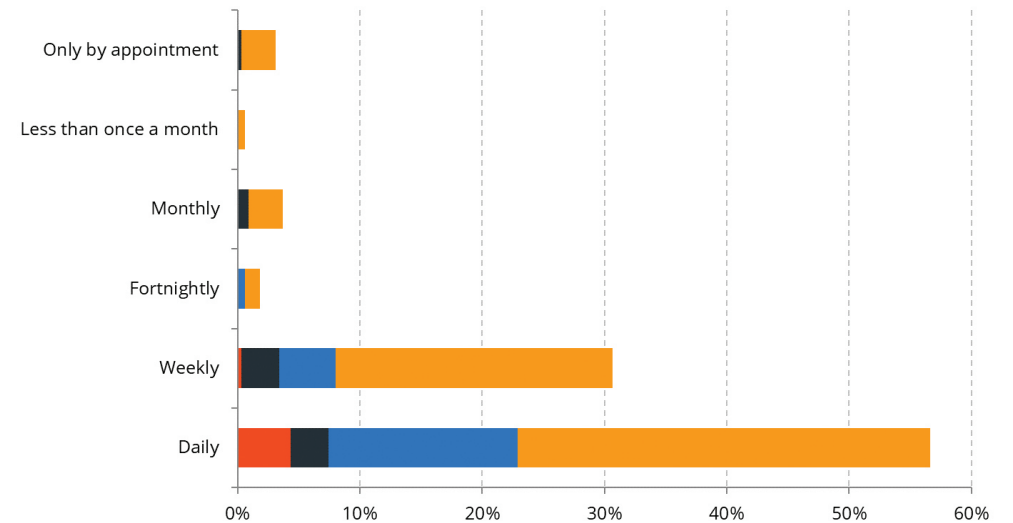
How often are you open to the public?

Overall



Filtered by organisation type

■ Aboriginal Cultural Organisation
 ■ Heritage Organisation
 ■ Art Gallery
 ■ Museum

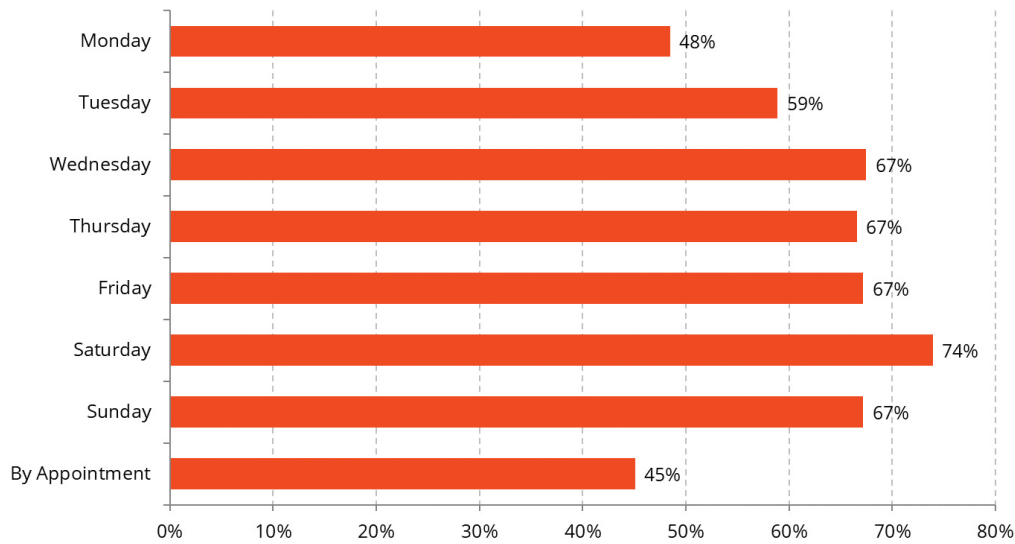


11.0 OPENING HOURS

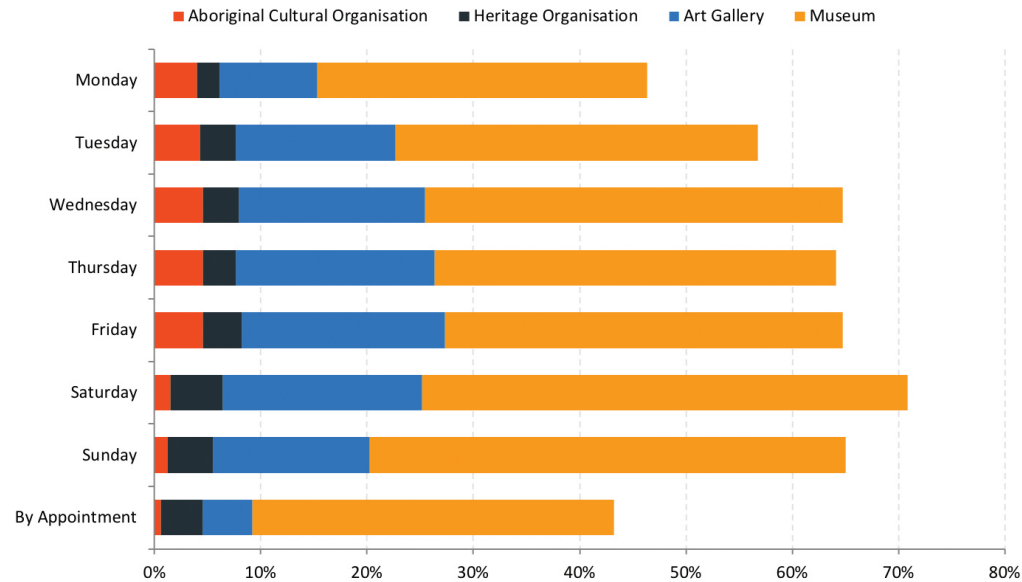
OPENING DAYS

Which days are you open to the public?

Overall



Filtered by organisation type



INSIGHTS:

Overall, organisations are most commonly open daily (59%), or once a week (32%). Aboriginal cultural organisations are open either daily or weekly. Art galleries only reported being open daily, weekly or fortnightly, with heritage organisations more likely to only be open monthly.

Opening days for organisations were spread across the week, with only 48% being open on Mondays. When filtered by organisation type, there was little notable difference in which day each type was open. Organisations are mostly commonly open to the public from 10am to 4pm.

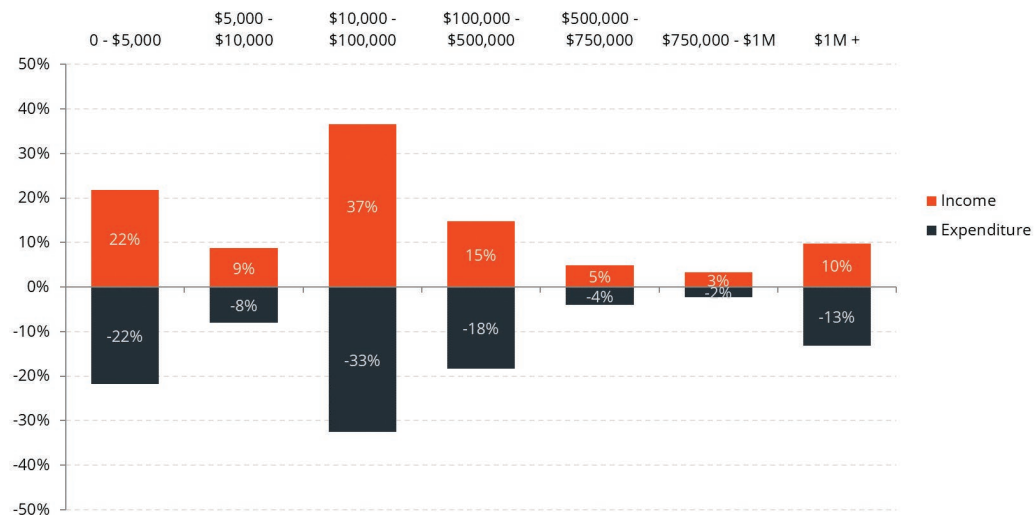
12.0 INCOME/EXPENDITURE

Respondents were asked a series of questions about their income and expenditure.

INCOME/EXPENDITURE COMPARISON

What was your annual income last financial year?

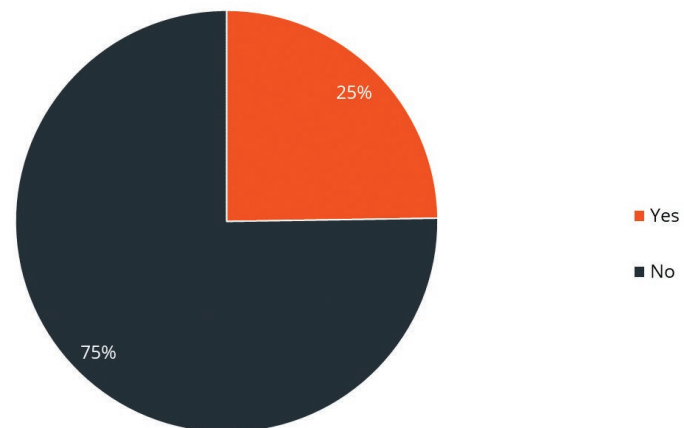
What was your annual expenditure last financial year?



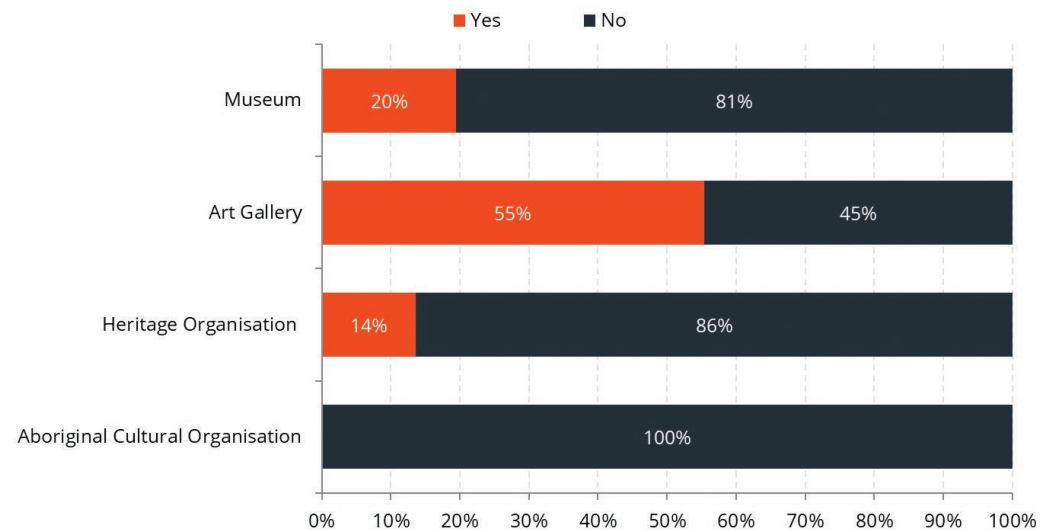
OPERATIONAL FUNDING

Is Local Government your primary source of operational funding?

Overall



Filtered by organisation type

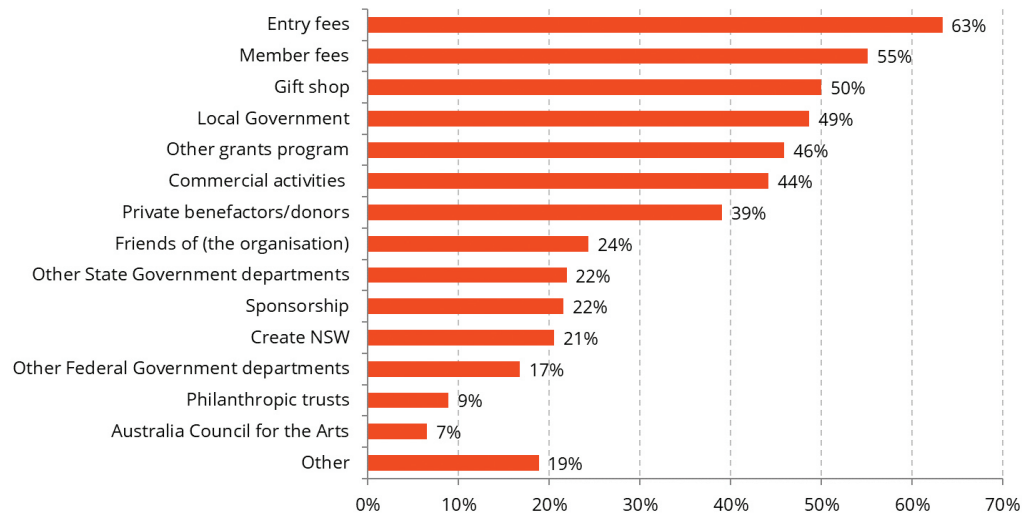


12.0 INCOME/EXPENDITURE

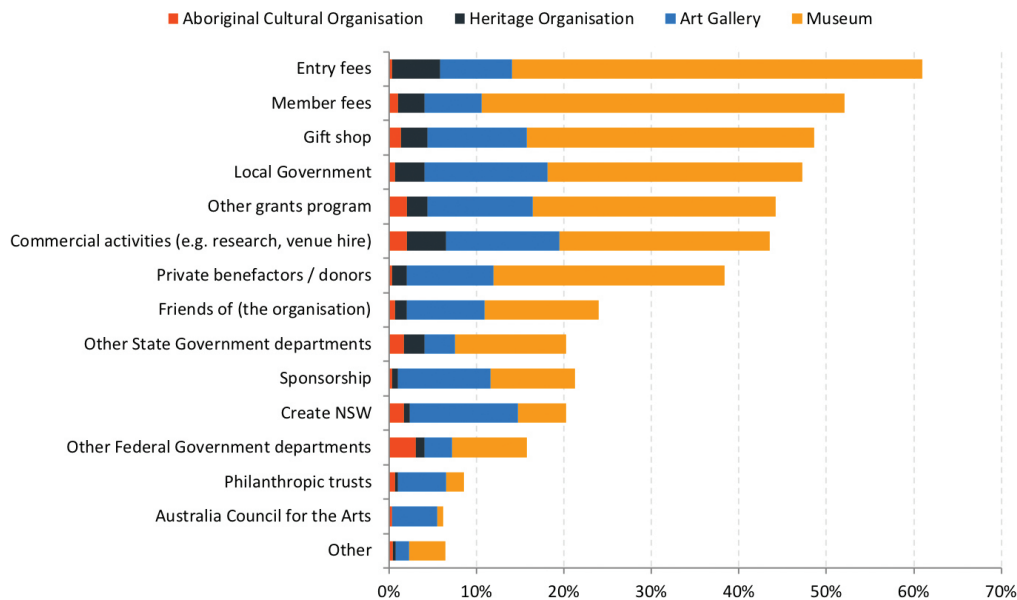
INCOME SOURCES

In the last 12 months, have you received income from any of the following sources?

Overall



Filtered by organisation type



INSIGHTS:

38% of organisations reported annual income over \$100,000 and 22% reported income under \$5,000. This is consistent with the trend for expenditure with 33% of organisations reporting over \$100,000 and 22% for under \$5,000.

One quarter of organisations reported their primary income source to be from local government. No Aboriginal cultural organisations reported receiving their primary income from local government, and just over half of art galleries reported local government as being their primary source of income.

Entry fees, member fees and gift shop revenues were the most common responses when organisations were asked about other income sources. Art galleries most commonly received funding from Create NSW and the Australia Council for the Arts. Museums most commonly received income from entry and member fees. Aboriginal cultural organisations were most likely to receive income from Federal Government Departments other than the Australia Council for the Arts.

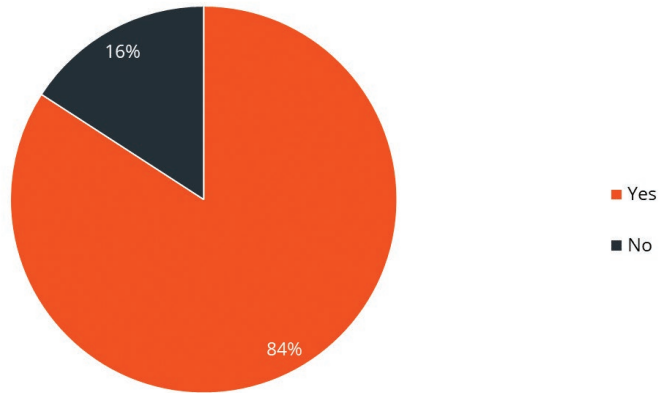
13.0 VISITATION

Respondents were asked a series of questions about their visitation records and numbers.

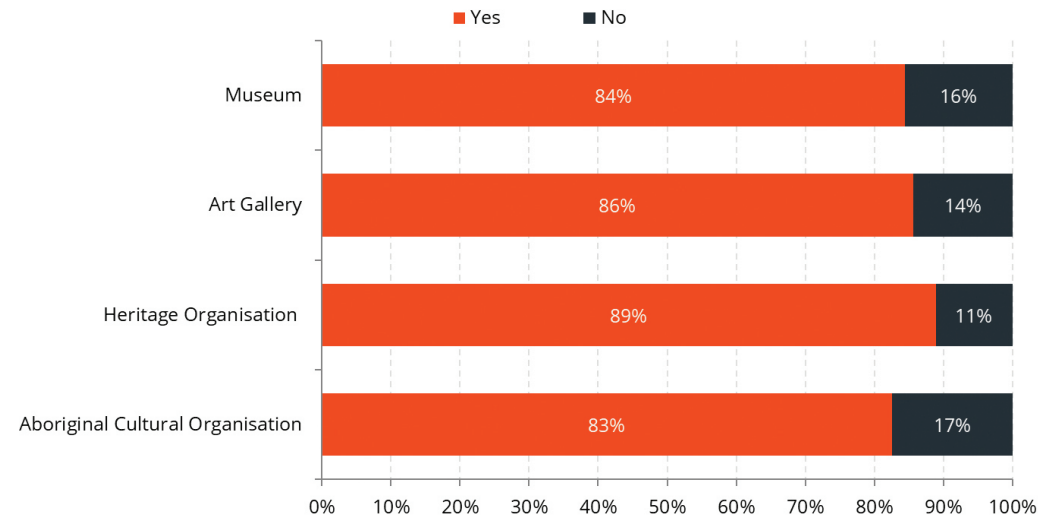
ARE VISITATION NUMBERS RECORDED?

Do you keep a record of the number of visitors you attract?

Overall

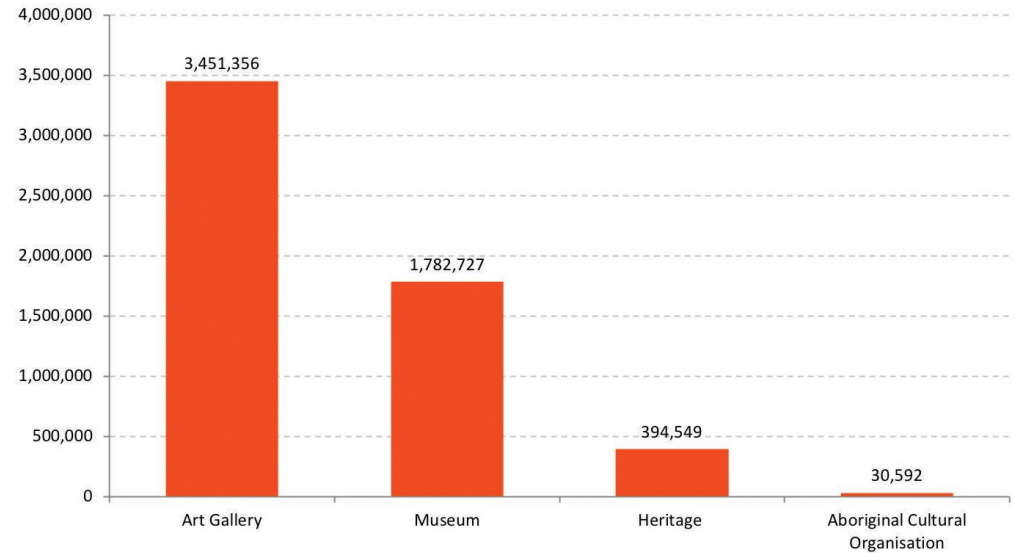


Filtered by organisation type



VISITATION IN 2017

If organisations kept a record of visitation, how many visitors did you attract in 2017?
If organisations did not keep a record of visitation, estimate the number of visitors in 2017.



INSIGHTS:

The majority of organisations record visitation numbers (84%). There was little difference when looking at these results by organisation type with over 80% of all organisations recording visitation in some way.

When asked about estimated visitor numbers, the majority of organisations in this category reported having less than 500 visitors per annum. Organisations that had actual visitation figures had a variety of responses ranging up to 250,000 visitors per annum. The majority of organisations had visitation between 1,000 and 10,000 (39%) or between 10,000 and 100,000 (32%).

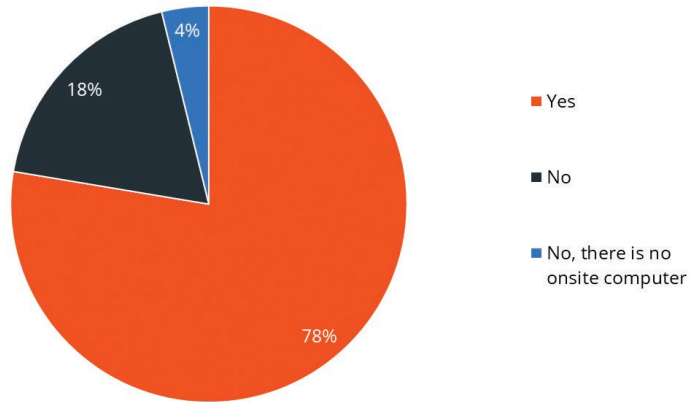
14.0 DIGITAL

Respondents were asked about their digital access and online presence.

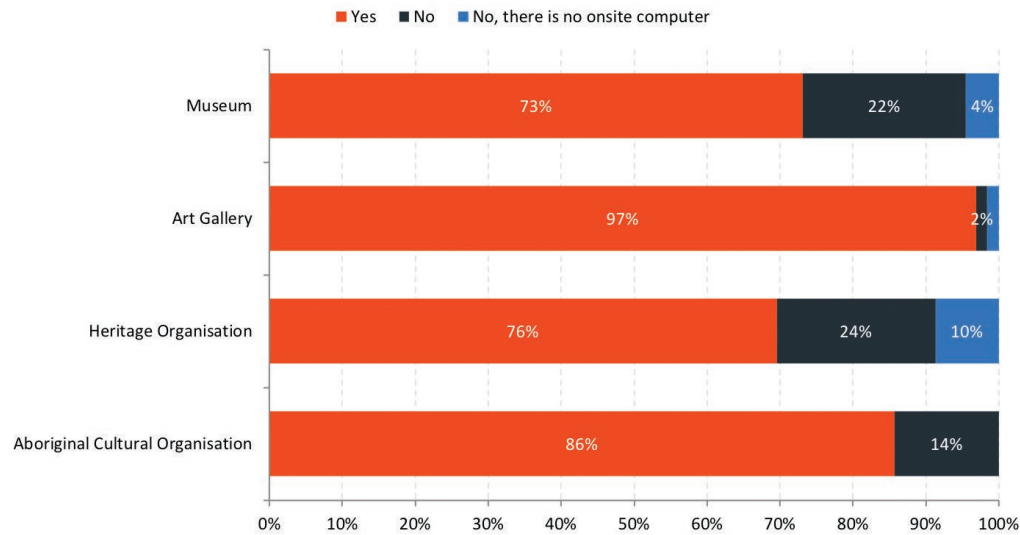
INTERNET ACCESS

Do you have access to the internet on site at your organisation?

Overall



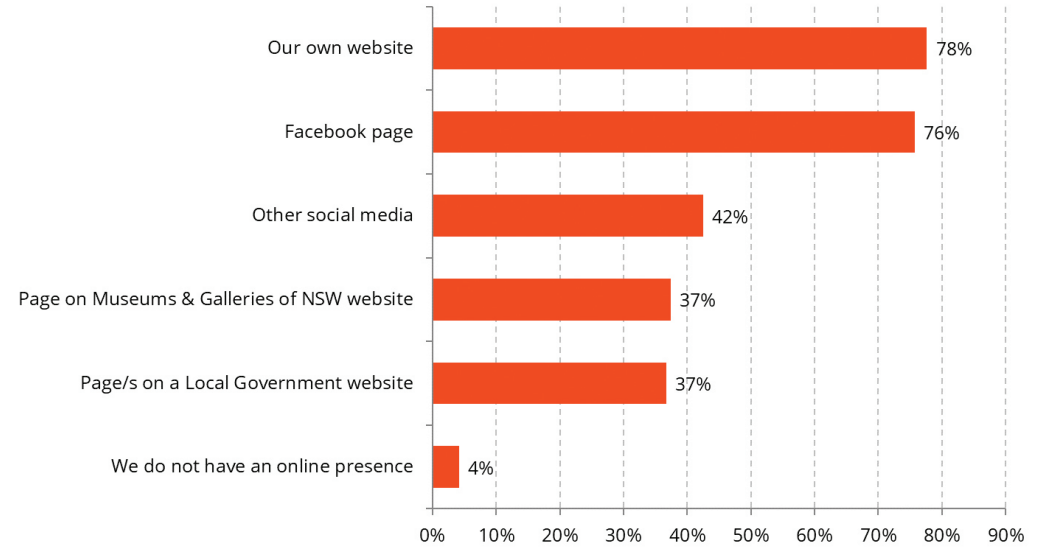
Filtered by organisation type



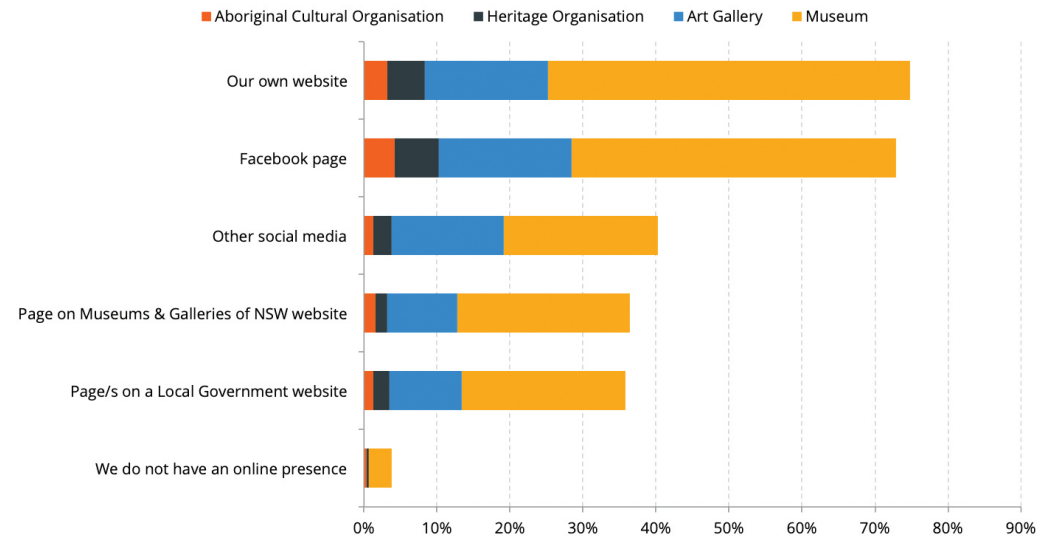
ONLINE PRESENCE

What online presence does your organisation have?

Overall



Filtered by organisation type

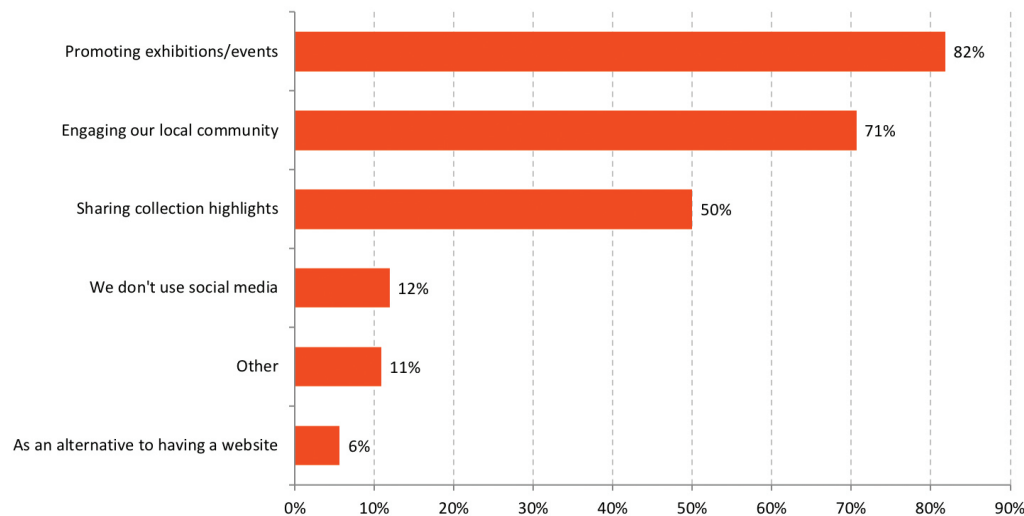


14.0 DIGITAL

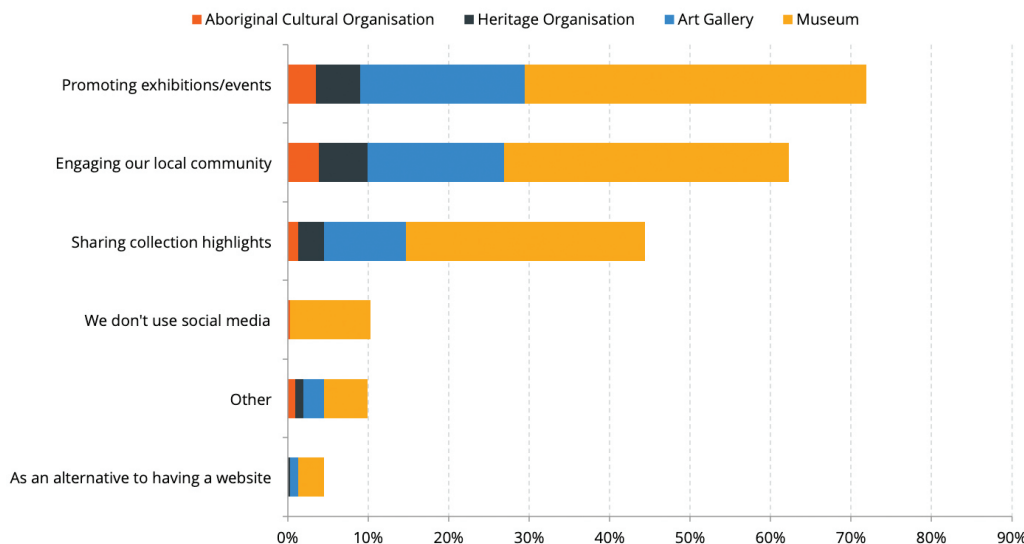
SOCIAL MEDIA USE

How does your organisation use social media

Overall



Filtered by organisation type



Respondents who selected 'other' were asked a follow up question to specify. Responses included the following categories:

- Advertising
- Attracting supporters and influencers
- Curator engagement with media
- Direct traffic to website
- Engaging broader community
- Linking to other museums
- Promoting venue for hire
- Sharing opportunities
- Sharing relevant news stories

INSIGHTS:

78% of organisations reported having access to the internet on site, with 4% reporting no computer access on site at all. The majority of art galleries have access to the internet, with museums and heritage organisations having the highest proportions of no internet or computer access.

Over three quarters of organisations reported having their own website or Facebook page (78% and 75% respectively). Nearly half of these also reported using other social media. 4% of organisations reported having no online presence. Of these, the majority were museums or Aboriginal cultural organisations.

Organisations reported using social media mostly for the promotion of exhibitions and events (82%), for engaging with their local community (71%) or sharing collection highlights (50%). 12% of organisations reported not using social media at all, which was made up of museums and Aboriginal cultural organisations.



Image courtesy of M&G NSW

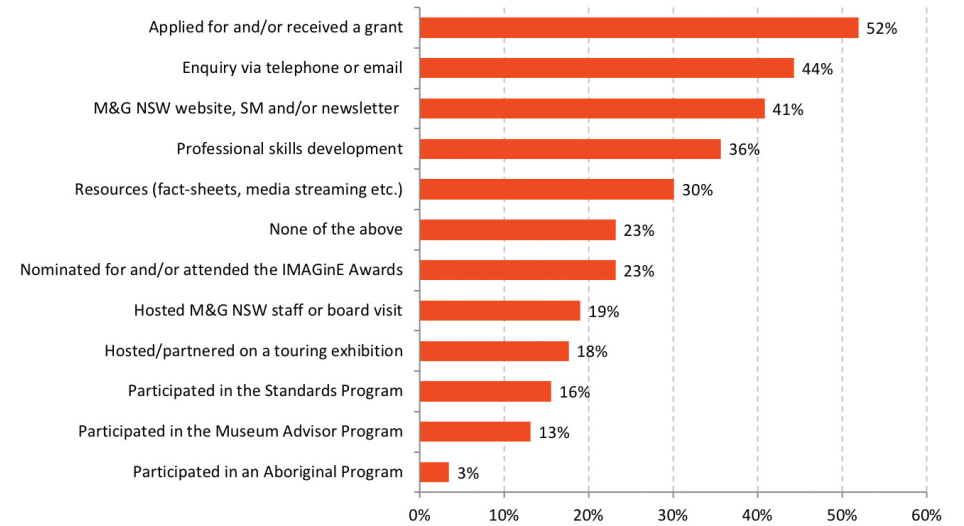
15.0 MUSEUMS & GALLERIES OF NSW

In the final section of the survey, organisations were asked a series of questions related to their engagement with Museums & Galleries of NSW in the past 5 years.

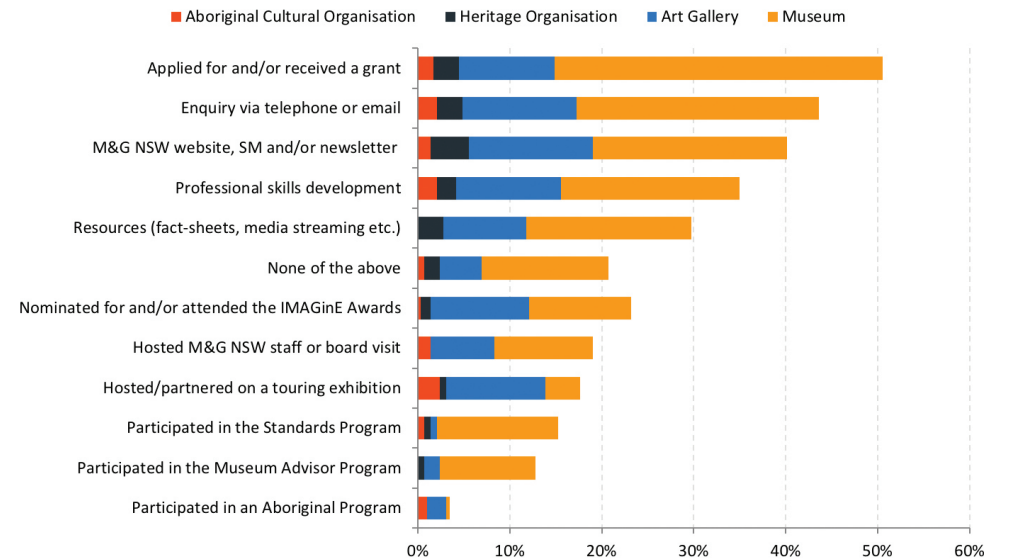
SERVICE USAGE

Has your organisation engaged with any of the following M&G NSW services in the past 5 years?

Overall



Filtered by organisation type

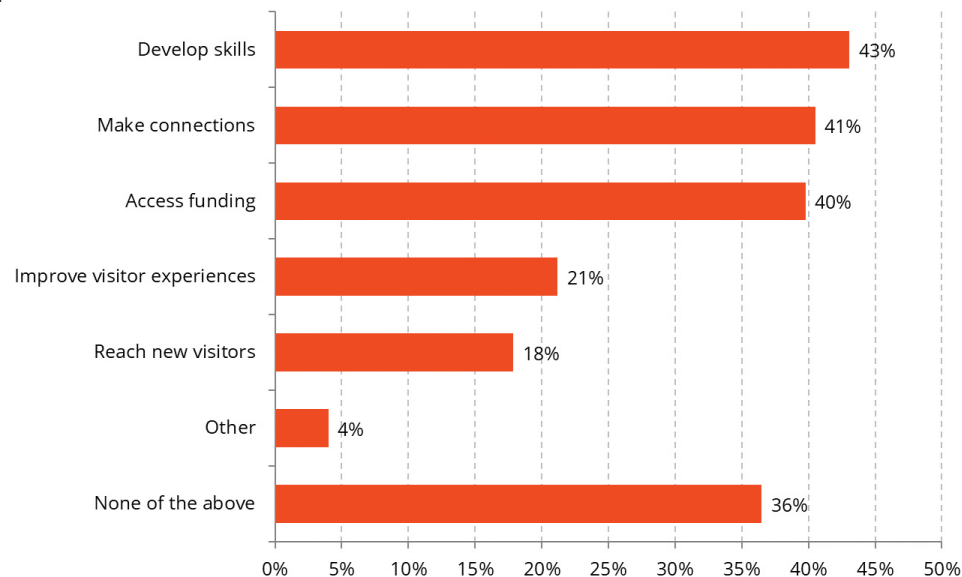


15.0 MUSEUMS & GALLERIES OF NSW

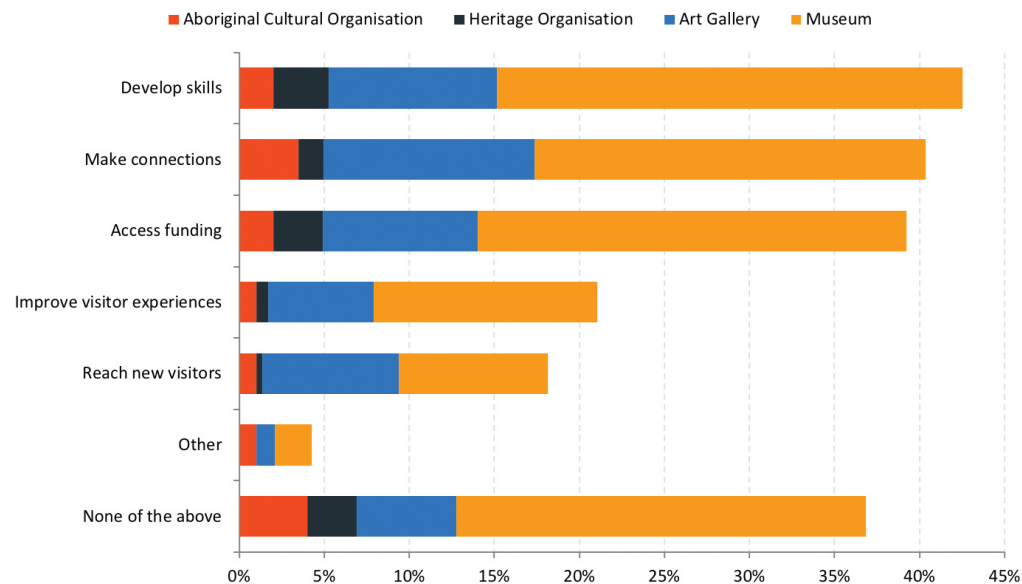
HELP

Has M&G NSW helped your organisation to do any of the following in the last five years?

Overall



Filtered by organisation type



Respondents who selected 'other' were asked a follow up question to specify. Responses included the following categories:

A video was created for our organisation

Always available for telephone advice on a range of subjects

Assist to build a knowledge base for our Councillors and senior management in local government

Collaborative environment; collegiate discussions; informative web presence

Improve collection management

Professional development of staff, including placements and conference

Professional development through Public Galleries Summit

Work together on The Aboriginal Culture, Heritage & Arts Association (ACHAA)

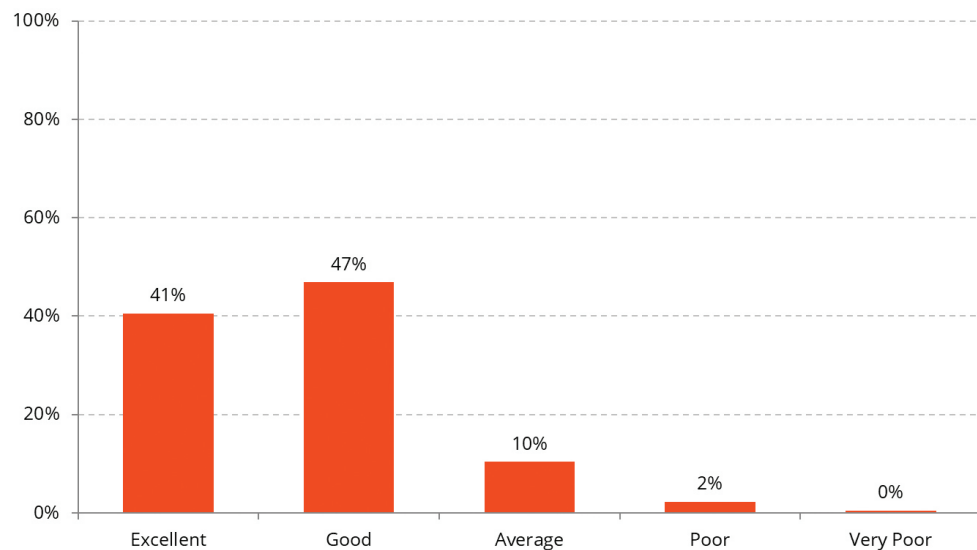
Mentoring of volunteers

15.0 MUSEUMS & GALLERIES OF NSW

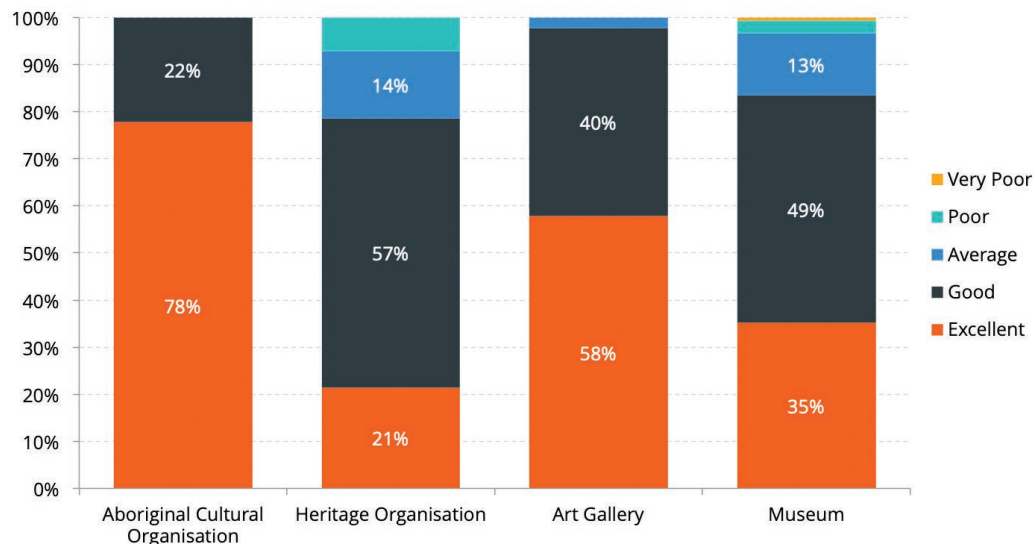
RATING

How would you rate M&G NSW overall?

Overall



Filtered by organisation type



INSIGHTS:

In the last five years, 52% of organisations have either applied and/or received a grant from M&G NSW, 44% have made an enquiry via telephone or email and 41% have used the website, social media or the newsletters. A smaller proportion of respondents reported having participated in the Standards Program and the Museum Advisor Program. Not surprisingly, art galleries are most likely to host or partner on a touring exhibition, and museums are most likely to apply for or receive a grant. Aboriginal cultural organisations and art galleries most commonly engage with the Aboriginal program services offered by M&G NSW.

Assistance in developing skills (43%), making connections (41%) and accessing funding (40%) were the most common responses when asked if M&G NSW had helped organisations in the past five years. Each category was relatively evenly spread between organisation type, with art galleries being slightly more likely to have been assisted to reach new visitors.

89% of organisations rated the M&G NSW services as either Good or Excellent, with a very small number of organisations rating the services as Poor or Very Poor, indicating a high level of positive engagement and experience. Aboriginal cultural organisations only rated the services as Good or Excellent with the majority of art galleries also responding in this way. Heritage and museums were the only organisation types to indicate a Poor or Very Poor response (1% of respondents overall).



Insights and report prepared by:

CultureCounts

culturecounts.cc | (08) 9325 6551

Report prepared for Museums & Galleries of NSW

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**Museums
& Galleries
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