

Museums & Galleries of NSW



2022 NSW Museum & Gallery Sector Census

Acknowledgement of Country

Museums & Galleries of NSW acknowledges the Traditional Custodians of the lands on which we live and work. We pay respect to them as First Nations people with continuing connection to land, place, waters and community.

We also acknowledge that Aboriginal led arts and cultural expression is an essential representation of our society, and that self-determination is central to the well-being of First Nations' peoples and communities, and our vision to support the recognition of Aboriginal peoples and culture throughout New South Wales.

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Cover images, left to right: Kandos Museum, Glasshouse Regional Gallery, The Great Cobar Museum, Bank Art Museum Moree, Armidale Aboriginal Cultural Centre, Orange Regional Museum, Lismore Regional Gallery, National Museum of Pottery. Images supplied by respective organisations.

1.0 OVERVIEW

As part of the Museums & Galleries of NSW research program, we conduct a comprehensive Census every four years to gather reliable data on collections, staffing levels, facilities, funding, and visitation within the sector. This study allows us to assess the sector's overall health and progress by comparing current data with previous census findings. It also informs our policies, advocacy efforts, and future programs and services.

The 2022 Sector Census took place from August to October 2022. We sent the Census survey to 508 organisations, including 319 community-run and managed museums, 57 public and regional museums, 39 public and regional galleries, 46 community-managed galleries and artist-run initiatives, 8 Artspaces, 14 University Galleries, and 25 Aboriginal cultural organisations. We received 240 complete responses, which form the basis of our findings. Responses were based on the previous 12 month reporting period.

M&G NSW continues to monitor the operational effects that the COVID pandemic has exacted on the sector. Organisations reported that they were closed for an average of 15 weeks or 29% of their last 12 month reporting period.

The figures presented in this report were significantly impacted by COVID lockdowns, capacity limits and associated uncertainty when planning events. The smaller sample size in the 2022 Census can be attributed to sector exhaustion, and the higher than usual surveying throughout the pandemic. Due to this, survey data may have increased the variability in comparison data with previous censuses.

Note: Where multiple responses were allowed, the total may add to more than 100%. Whole number rounding error may account for when charts do not add to exactly 100% (e.g. 101% or 99%).

91%
of organisations
manage a collection.



49%

of respondents have **partially catalogued** their collections, and **41%** have **completed cataloguing**.



Respondents engaged

2,257

permanent, part time and casual staff as well as contracted artists, creatives and consultants.



63%

of organisations have **partially digitised** their collections, while **10%** have completed digitisation.



95%

of respondents identified **risks** to their collections.



13%



of the organisations with paid staff reported positions being **amended in the past 4 years** to support operations outside their facility.



38%

of respondents indicated that their **staff and volunteers require training** to effectively **engage audiences digitally**.

42%

of respondents have **paid staff**, with the remaining **58%** operated entirely by **volunteers**.

93%

of organisations **rely on volunteers** to provide a range of functions. **Only 7%** operate with **paid staff only**.



2,693,515

Visitation in the reporting period represents a **52% decrease** on the **2018 Census** due to **pandemic related lock downs, capacity limits and difficulty on planning and delivering events**.



68%

respondents are **partnering** with other organisations to deliver **engagement programs**.

Volunteers play a **crucial role** in various aspects of organisational functioning, including collection care activities.



Organisations have an average of

23.4 active volunteers



On average, respondents reported

85 **volunteer hours per week**, emphasising the valuable contribution volunteers make to the sector.



1,198

temporary exhibitions were delivered by respondents.



58%

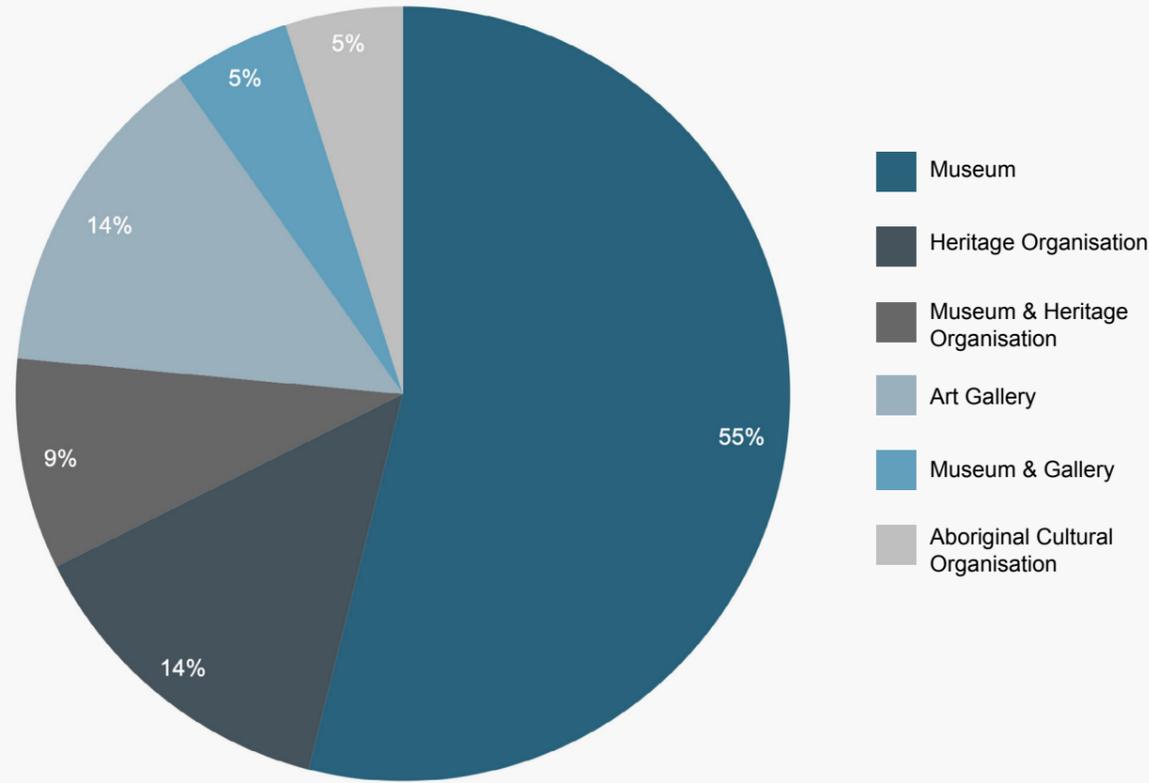
respondents stated they have commenced or are planning **sustainability initiatives**.

2.0 ORGANISATIONS

2.1 Types of Organisations

Among the completed responses, the breakdown of organisational types is as follows: 55% identify as a museum, 14% as a heritage organisation, 9% as a museum and heritage organisation, 14% as a gallery, 5% as a museum and gallery, and 5% as an Aboriginal cultural organisation.

How would you describe your organisation?



Art Gallery

A place that primarily collects and/or exhibits visual arts, crafts and design.

Museum

A place that primarily collects and/or exhibits historical objects and artefacts.

Heritage Organisation

Concerned with cultural traditions, physical place and historic buildings.

Aboriginal Cultural Organisation

A place dedicated to the presentation of Aboriginal culture and cultural practice

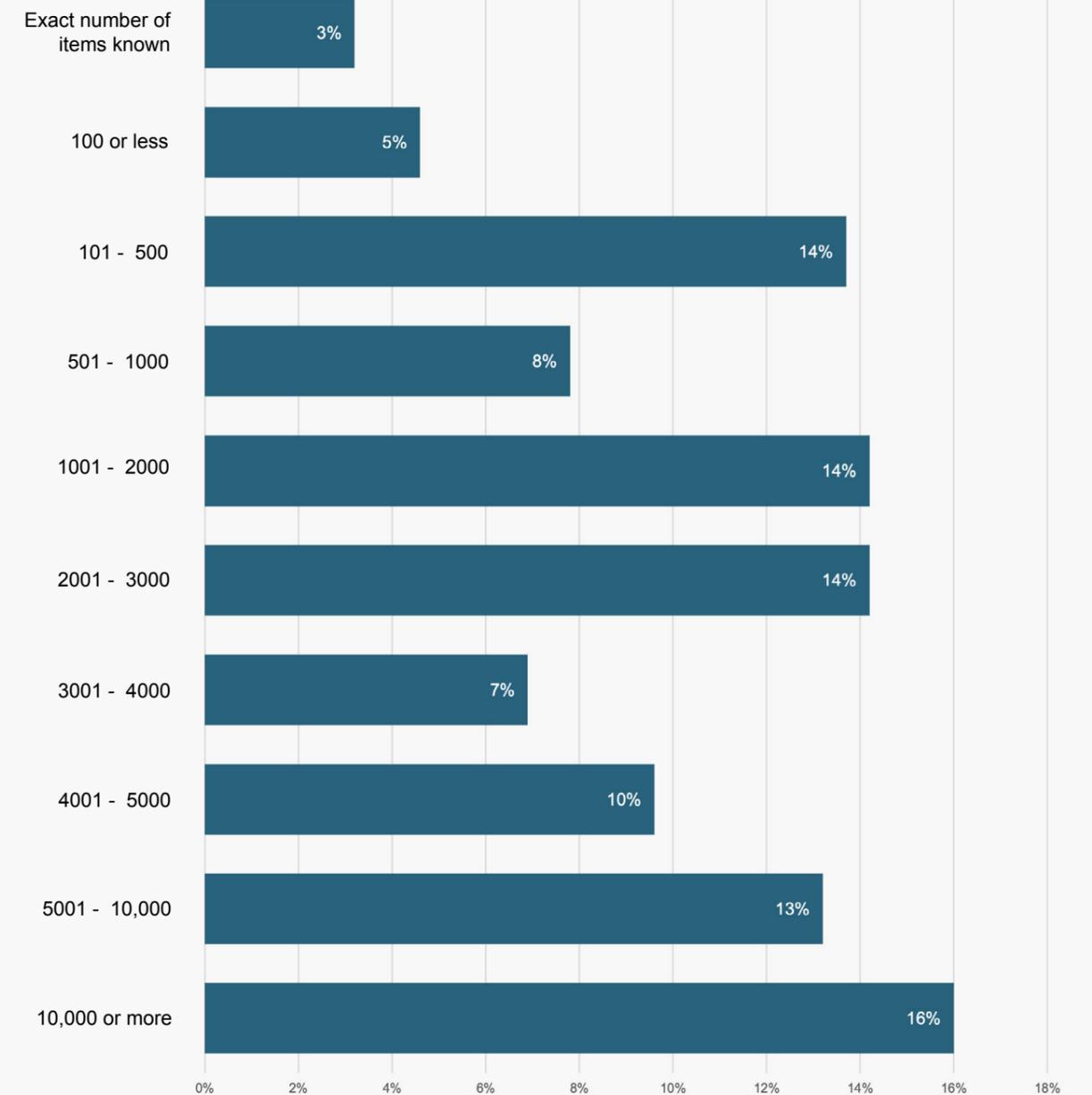
3.0 COLLECTIONS

The majority of respondents (91%) manage a collection. Those that do not hold a collection (8%) is down from the 10% reported in the 2018 Sector Census.

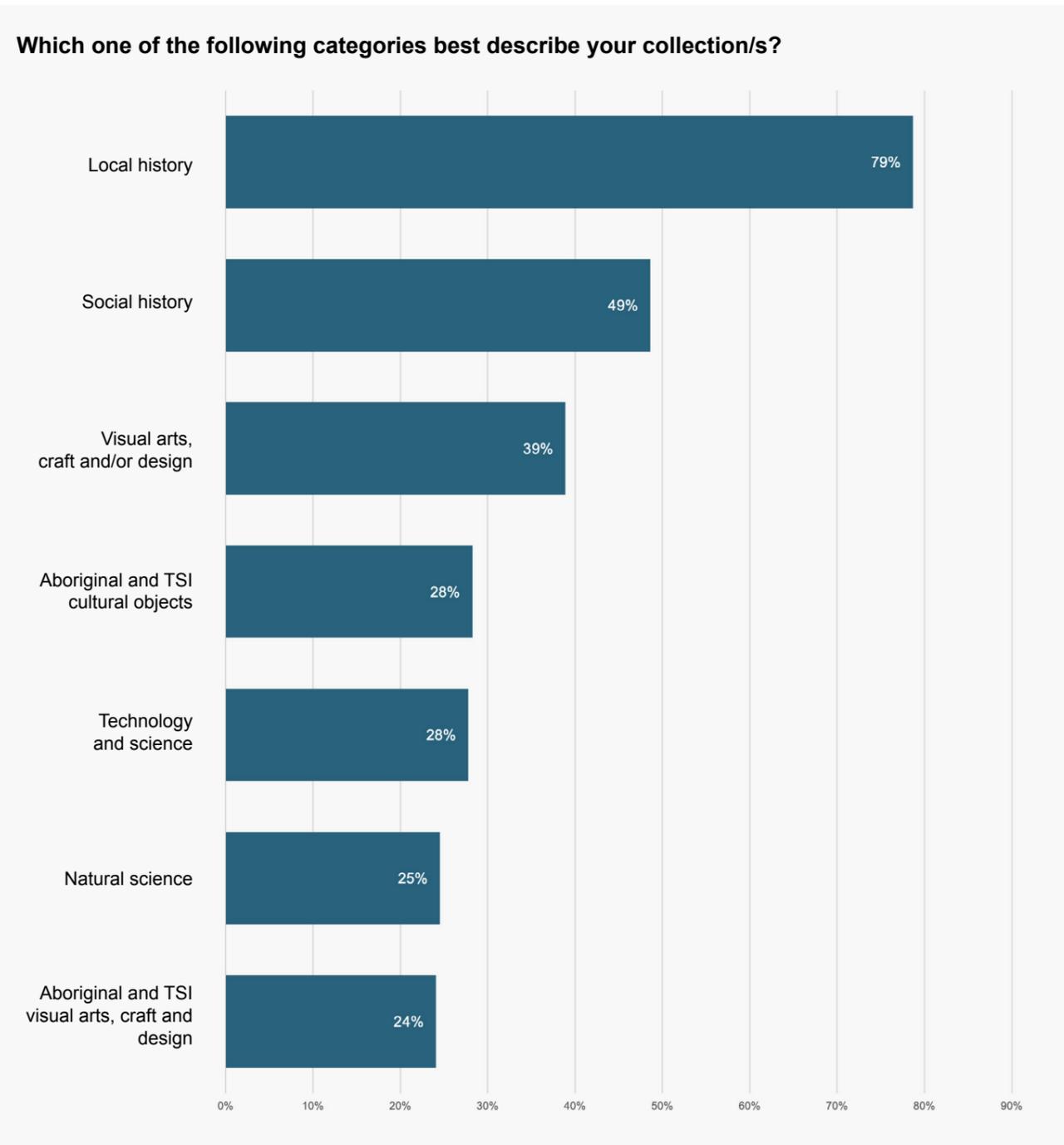
3.1 Collection Size

In terms of collection size, 55% of respondents have fewer than 3000 objects in their collections, a slight increase from the 50% reported in 2013. Only 3% of respondents know the exact number in their collections. This suggests a need for further documentation is required.

How many items do you have in your collection/s?



3.2 Collection Type



In the 2022 Census, participants were given the option to select multiple categories that describe their collection, a departure from previous censuses where only one choice was allowed. This change led to variations in reported figures compared to previous data.

One finding of this variation is the high proportion of organisations that identified Aboriginal and Torres Strait Islander cultural objects and Aboriginal and Torres Strait Islander visual arts, crafts, and design items in their collections. These findings illustrate the breadth of organisations across the sector holding Aboriginal and Torres Strait Islander cultural objects and artworks in their collections.

Local history: Related to the immediate local history and environment.

Social history: Related to a particular social movement or pastime, not place specific.

Visual arts, craft and/or design: Such as ceramics, drawing, painting, sculpture, printmaking, design, crafts, photography, video, filmmaking and architecture.

Aboriginal and Torres Strait Islander cultural objects: Objects and ephemera created and used by Aboriginal and Torres Strait Islander people of Australia.

Technology and science: Related to the application of technology and science.

Natural science: Related to the natural world e.g. botany, geology.

Aboriginal and Torres Strait Islander visual arts, craft and design: Visual arts, crafts and design created by Aboriginal and Torres Strait Islander people of Australia.



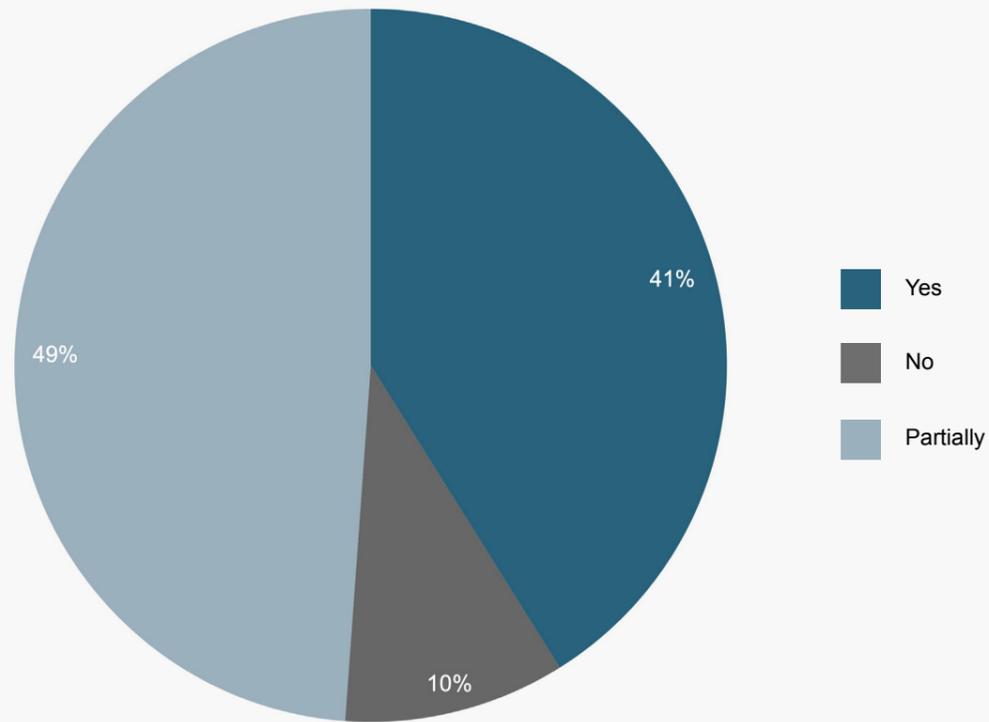
Aboriginal Culture, Heritage & Arts Association members took part in Stories around the Campfire with Aunty Angela Brown as part of their conference at Yarrawarra Aboriginal Cultural Centre on Gumbaynggirr Country. Photo by Marly Morgan.

4.0 CATALOGUING AND DIGITISATION

In terms of cataloguing their collections, the findings show that 49% of respondents have partially catalogued their collections, indicating an increase from 40% in 2013.

However, the percentage of respondents who have completed cataloguing has decreased to 41%, down from 46% in 2018 and 52% in 2013. Additionally, 10% of respondents reported having no cataloguing at all, which is an increase from the 5% reported in 2018 and 7% in 2013.

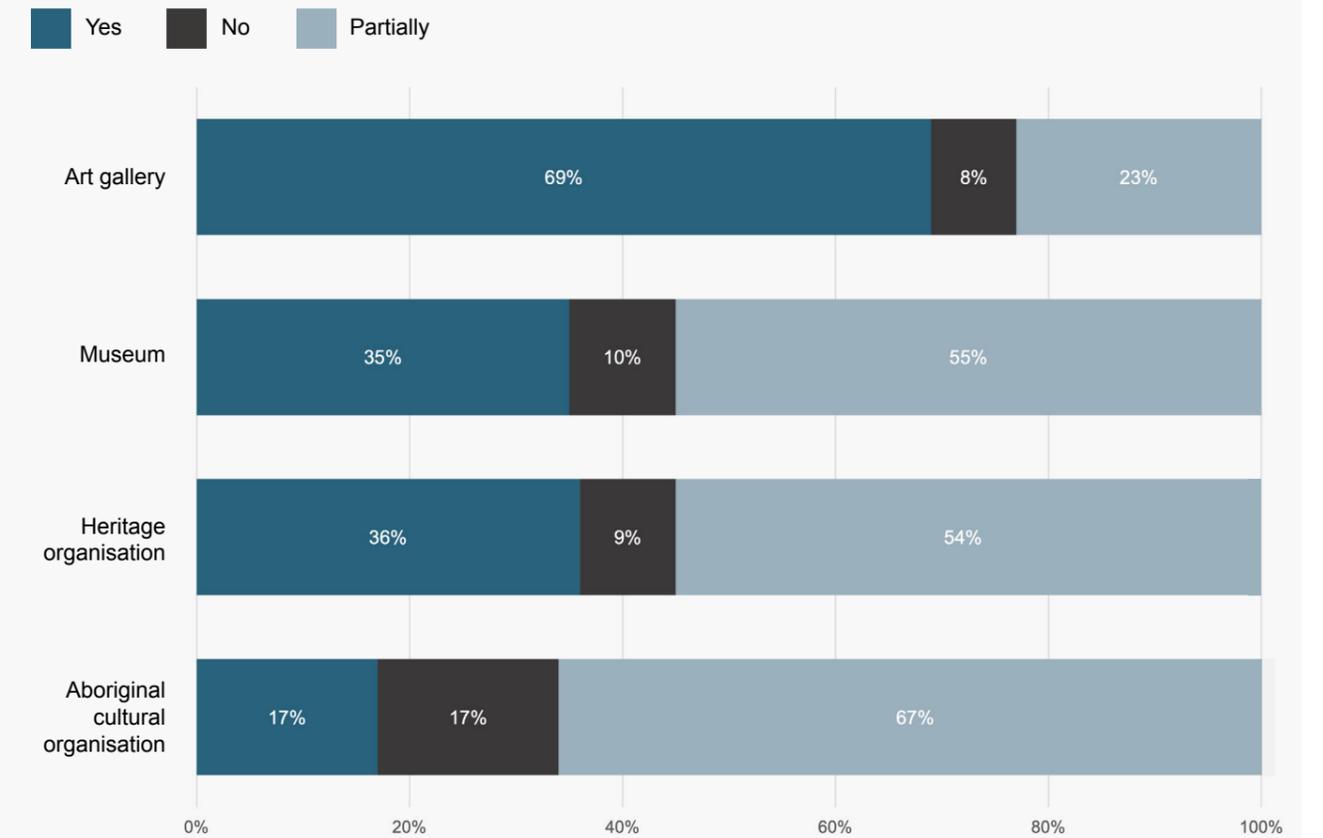
Has your collection/s been catalogued?



Among the organisations that reported having partially catalogued their collections, the breakdown of cataloguing progress is as follows:

- 27% of organisations have catalogued **less than 25%** of their collections.
- 21% of organisations have catalogued **between 25% and 50%** of their collections.
- 32% of organisations have catalogued **between 51% and 75%** of their collections.
- 20% of organisations have catalogued **more than 75%** of their collections.

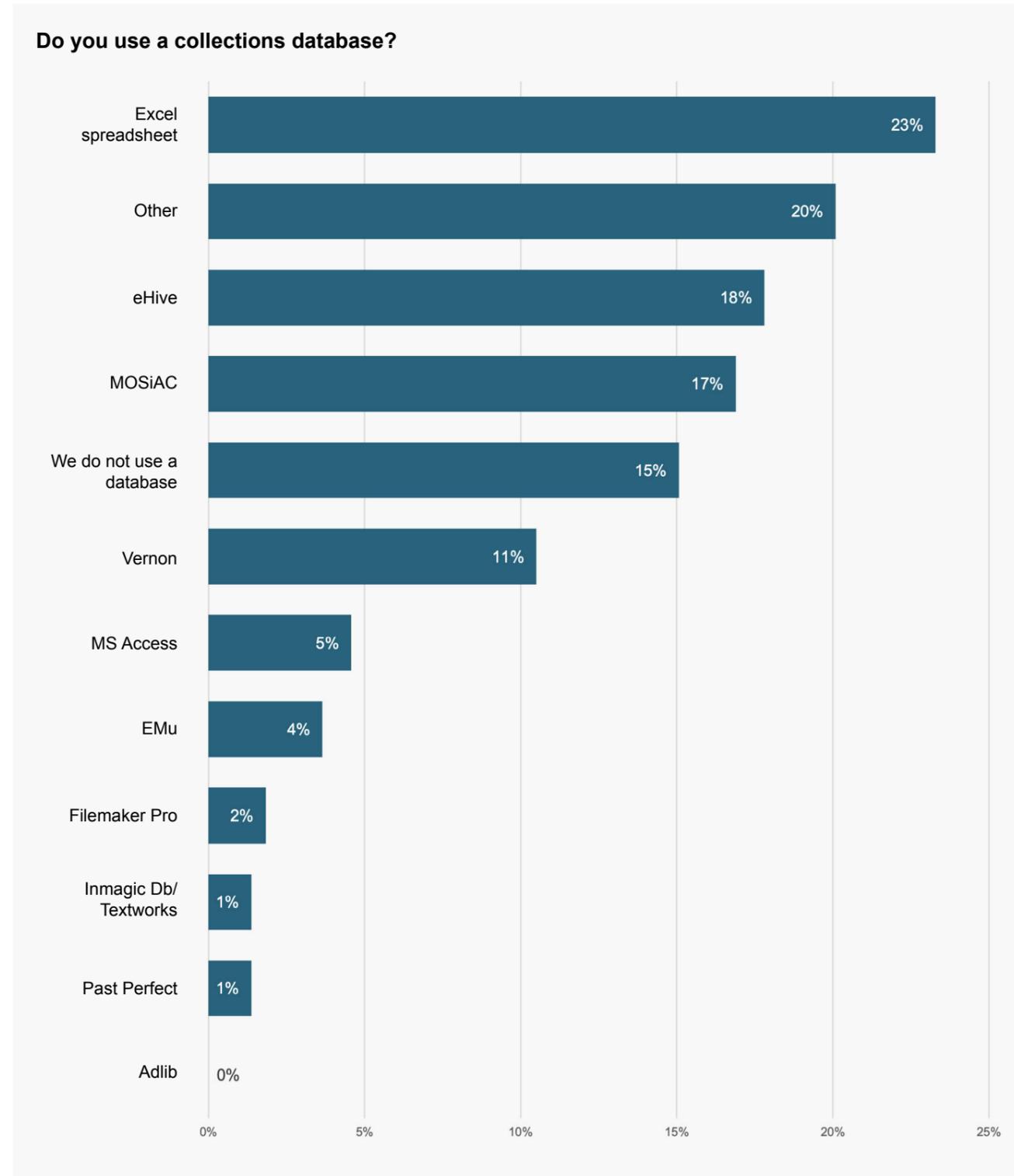
Has your collection/s been catalogued? Filtered by organisation type.



Jeremy Kruckel, Gallery Technician at Wagga Wagga Art Gallery during his Mentoship Program at the Art Gallery of NSW, at the Art Gallery of NSW, 2019. Photo by Vanessa Low.

4.1 Collection Database

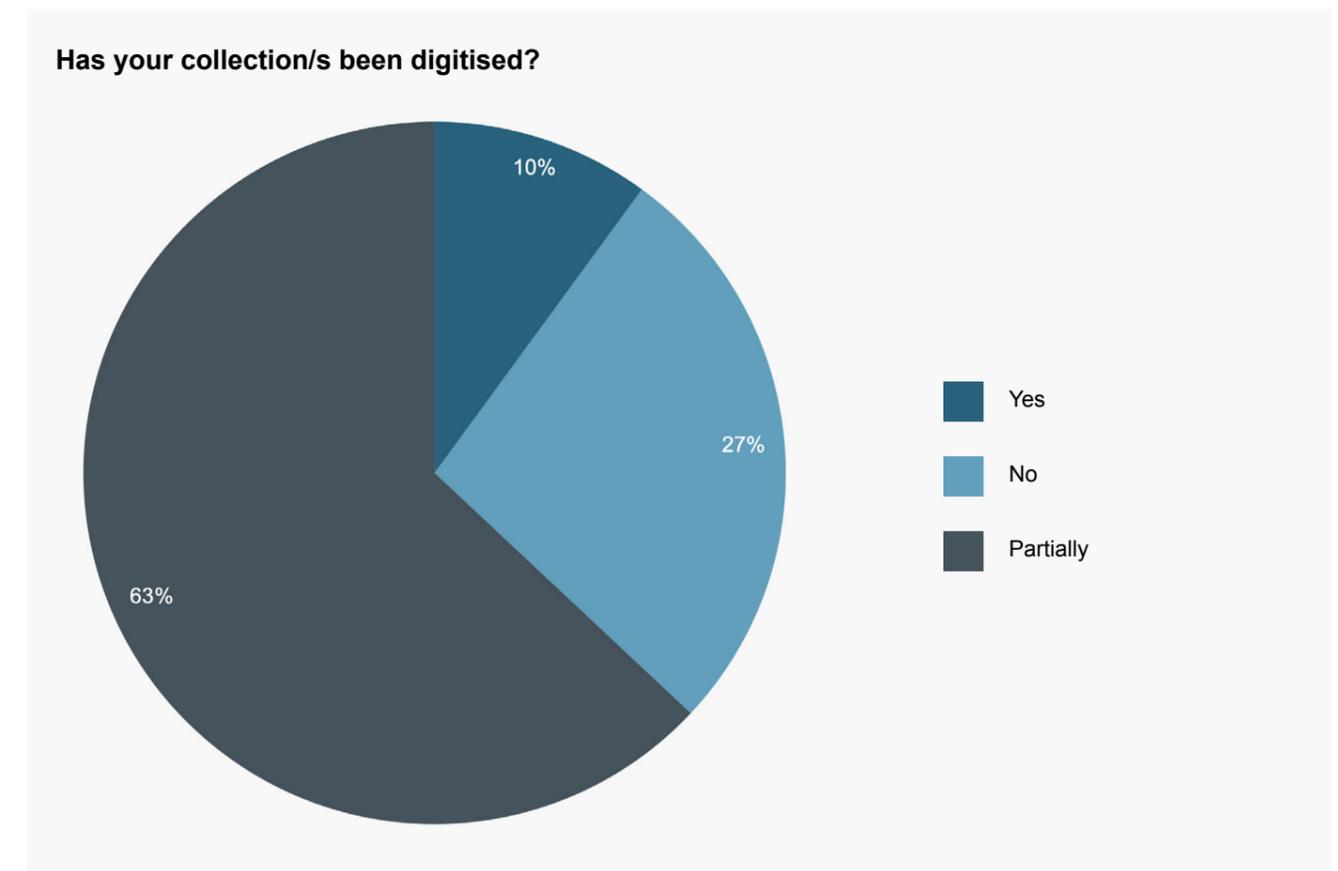
The findings reveal that currently, 15% of respondents are not using any form of collection management system. This represents a decrease from 27% in 2018, suggesting an increasing adoption of collections databases within the sector. Among the organisations utilising a CMS, the most commonly used systems are eHive (18%) followed by Mosaic (17%). It is worth noting that 23% are using an Excel spreadsheet in lieu of affording a content management system.



4.2 Digitisation

The majority of organisations managing a collection (63%) have partially digitised their collections, while an additional 10% have completed the digitisation process.

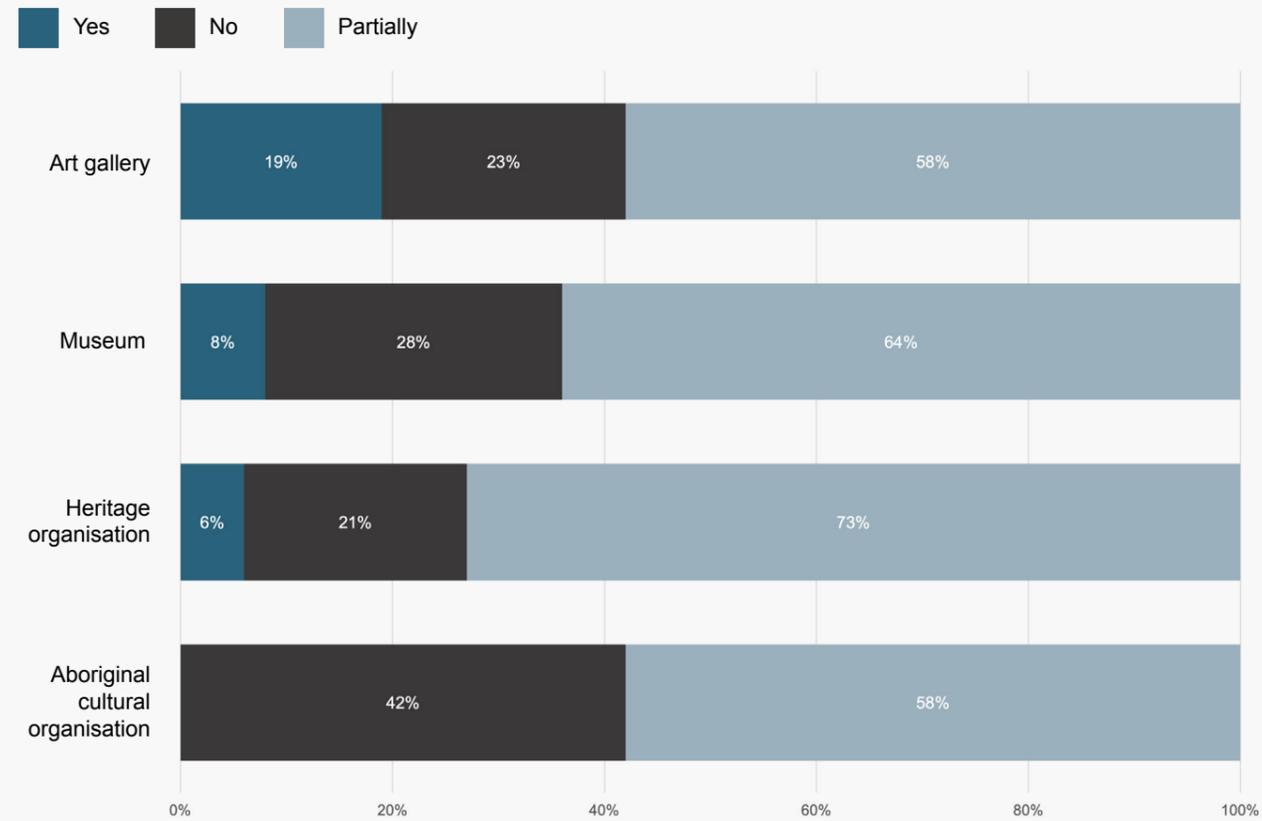
Among the 27% of respondents who have not yet begun the digitisation process, 75% identified lack of funding, lack of training, and/or lack of confidence as a barrier in their digital engagement capabilities.



Among the organisations that reported having partially digitised their collections, the breakdown of digitisation progress is as follows:

- 40% have digitised **less than 25%** of their collections.
- 31% have digitised **between 25% and 50%** of their collections.
- 18% have digitised **between 51% and 75%** of their collections.
- 11% have digitised **more than 75%** of their collections.

Has your collection/s been digitised? Filtered by organisation type.



5.0 RISKS TO COLLECTIONS

The Census results indicate that 95% of the sector identified having risks to their collections. This included 68% of the sector reporting to have urgent and/or long-term building maintenance issues that impact the safe storage of their collections.

The most prevalent problem identified was inadequate storage, affecting 58% of respondents, followed by fluctuating temperatures, primarily heat and moisture, at 39%. Additionally, 47% listed a lack of funding as a threat to their collections.

Another significant issue highlighted in the Census is the lack of trained staff or volunteers in collection care, which was reported by 45% of respondents. Furthermore, 23% of organisations either did not have a disaster management plan or had an inadequate one.

Climate or disaster-related issues and risks, excluding building issues like leaks or rising damp, were identified by 19% of respondents.

Only a small percentage (5%) of those managing a collection indicated that they currently face no risks to their collections.

Identify current risks to your collection/s.

Inadequate collection storage space	58%
Unsuitable or limited storage and archive materials	51%
Falling volunteer numbers	49%
Lack of funding	47%
Lack of trained staff and/or volunteers	45%
Long term building maintenance	44%
Heat and moisture levels and/or fluctuations	39%
Unaddressed conservation issues	31%
Urgent building maintenance	24%
Lacking or non-existent disaster management plan	23%
Rising power costs	20%
High risk of future natural disaster events	19%
Financial hardship	16%
Untreated pests	12%
Lacking or non-existent collections policy	9%
There are no current risks to our collection	5%
Governance issues	5%



Digitising at Tamworth Regional Gallery for the Storyplace project, 2022. Image courtesy of Tamworth Regional Gallery.

6.0 VALUE OF COLLECTIONS

6.1 Collection Value

The majority of organisations with collections (69%) do not know the exact financial value of their collections. Only 17% have an understanding of the approximate value, and 17% know the current value. These figures are consistent with the findings from 2018.

Among the organisations reporting a figure for the value of their collection (either estimate or known figure), the average value was \$7,195,923.

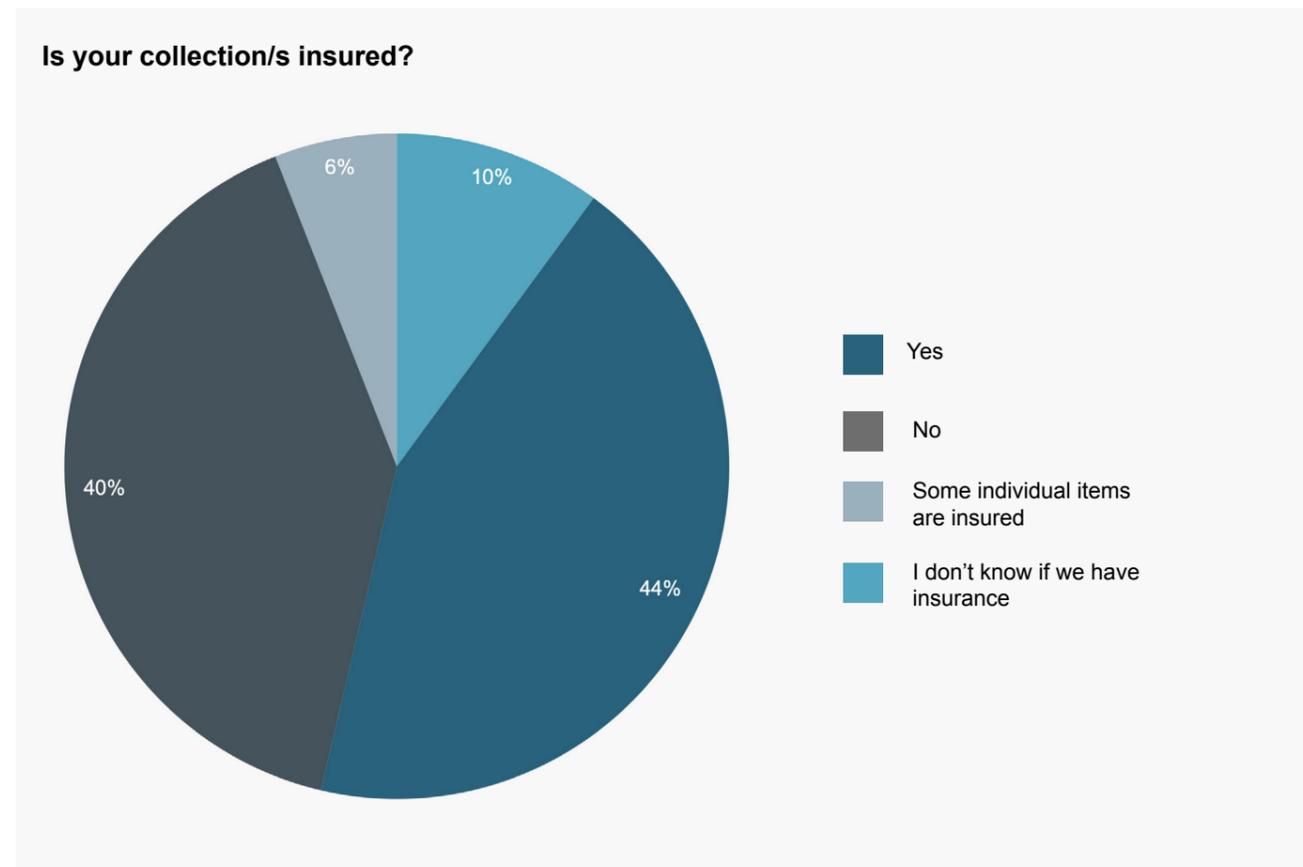
It is worth noting that only 31% of respondents provided a total value of their collections (either estimate or known figure). However, the total value of collections as reported by these organisations amounted to almost \$500 million (\$489,322,786).

Factoring in the lower than anticipated sample size, as well as the difficulty for many organisations to ascertain their collection value, it is safe to assume the total value of collections held by the sector is vastly greater than recorded.

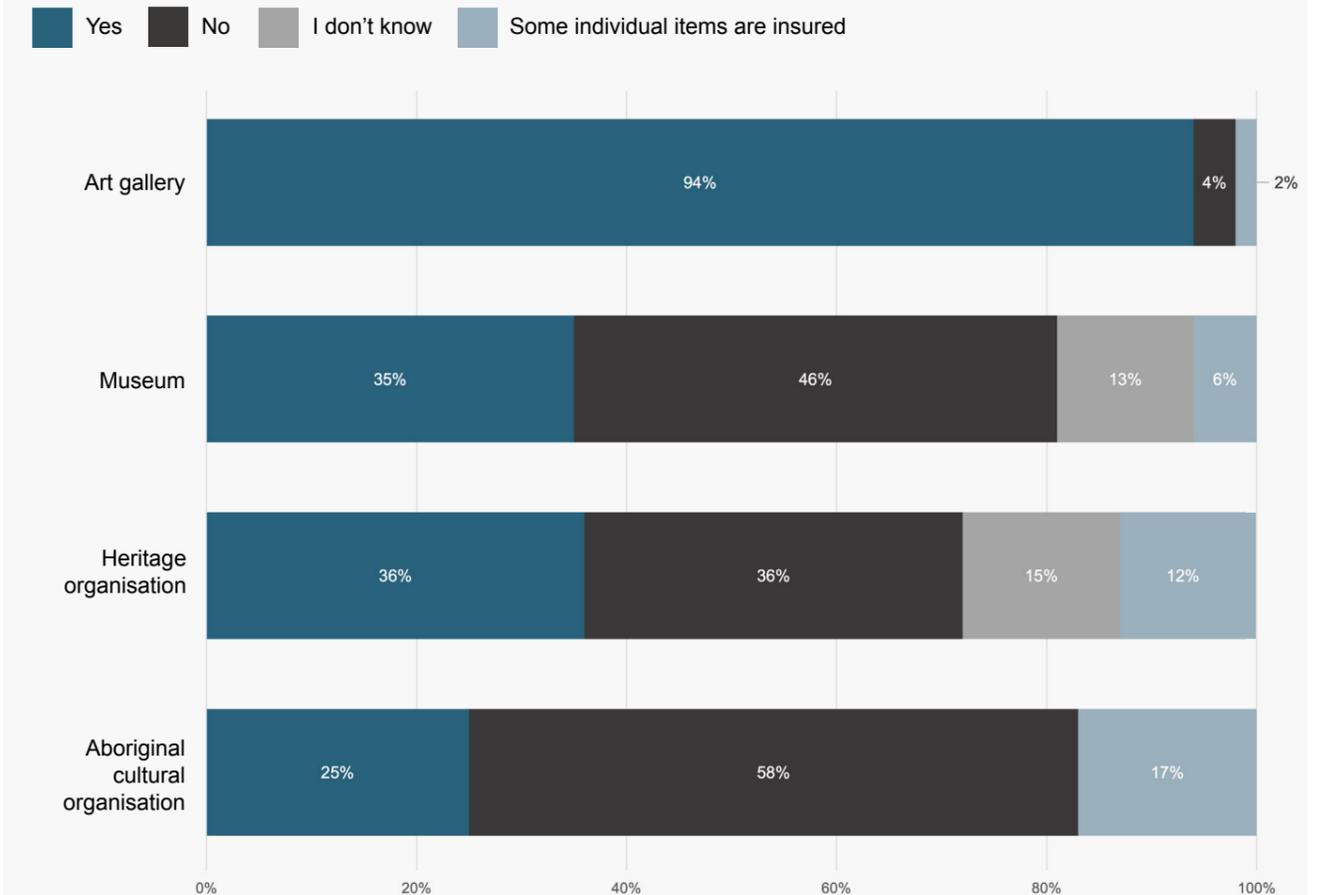
6.2 Insurance

44% of respondents reported having some level of insurance coverage for their collections, which is a decrease from 49% in 2018. This suggests that the cost of insurance is becoming a deterrent for some organisations.

40% of respondents reported that their collections were uninsured. 10% are unsure if they have any form of coverage. 6% have individual items covered by insurance, down from 10% in 2018.



Is your collection/s insured? Filtered by organisation type.



Installation view of *Material Sound*, curated by Dr Caleb Kelly, at NorthSite Contemporary Arts, 2022. Photo: Cristina Bevilacqua.

7.0 STAFFING AND RESOURCES

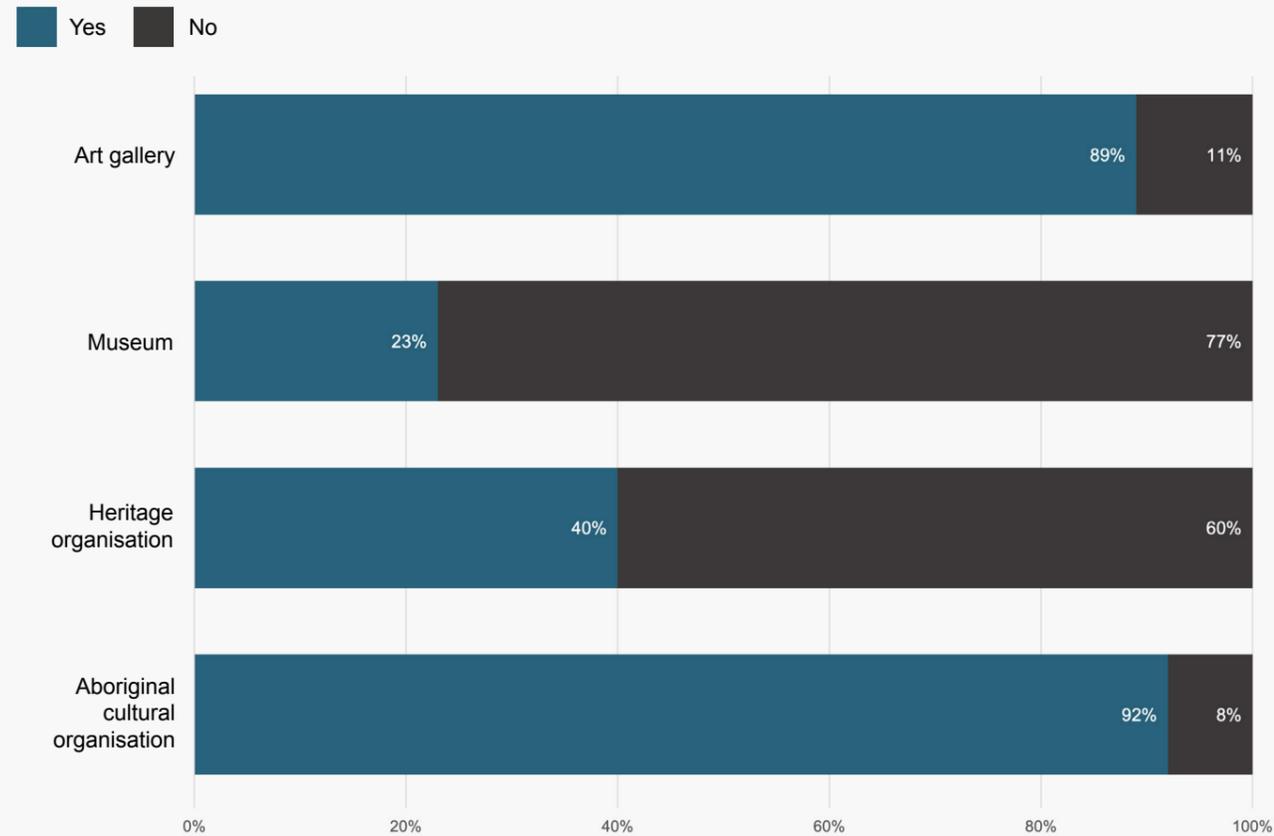
Only 42% of respondents have paid staff, while the remaining 58% rely entirely on volunteers. This compares to previous census reports, with 2018 indicating 45% had no paid staff, and in 2013, 55% had no paid staff.

7.1 Paid Staff

Respondents engaged 2,257 staff and creatives:

Permanent and permanent part time staff	568
Artists and/or creatives on a casual or contract basis	892
Other casual staff such as front of house and event staff	428
Other contractors such as installers and consultants	369

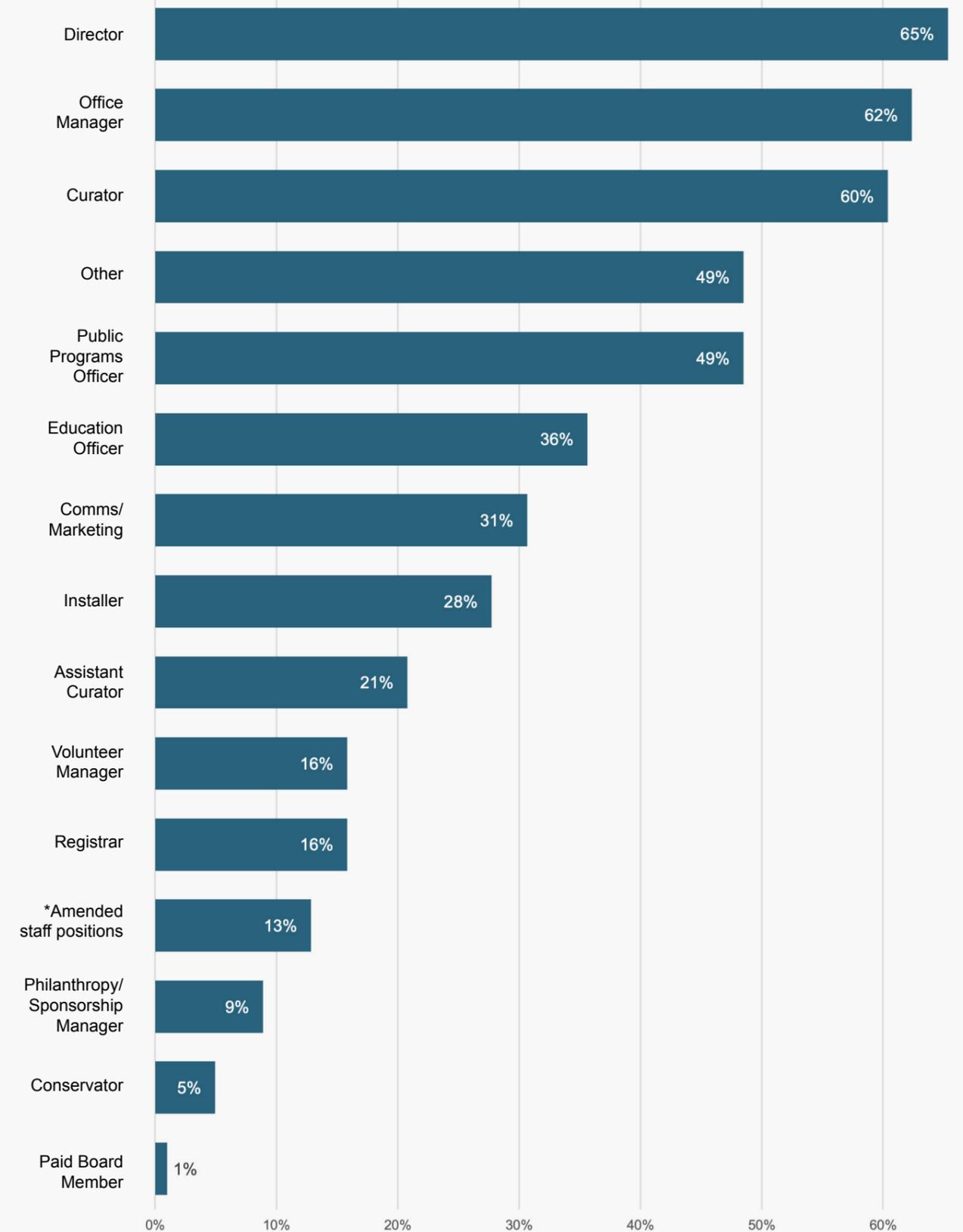
Do you have paid staff? Filtered by organisation type.



Across the sector:

- On average, art galleries with paid staff have **5.3 full-time equivalent (FTE) paid staff**.
- On average, museums with paid staff have **3.6 FTE paid staff**. These statistics include both Local Government operated Museums and Community Museums.
- On average, heritage organisations with paid staff have **1.8 FTE paid staff**.
- On average, Aboriginal Cultural Organisations with paid staff have **1.9 FTE paid staff**.

Which positions do your paid staff officially fill?



*Indicates if staff positions have been amended in the past 4 years to support operations outside your facility e.g. supporting other cultural organisations, departments or events in your LGA.

13% of organisations with paid staff reported positions being amended in the past 4 years to undertake activities outside the immediate needs of the cultural organisation. Examples of this include supporting other cultural needs of an LGA in other council departments.

7.2 Volunteers

The majority of organisations (93%) rely on volunteers, while only a small portion (7%) operate with paid staff only. This indicates a slight decrease from the 9% reported in 2018.

Volunteers play a crucial role in the various operations of their organisations. A significant percentage (67%) rely on volunteers to ensure the organisation is open and adequately staffed. Volunteers also contribute to collection care activities (60%) and digitisation (46%). Additionally, 49% of organisations perceive a decline in retaining volunteers as a risk to their collection.

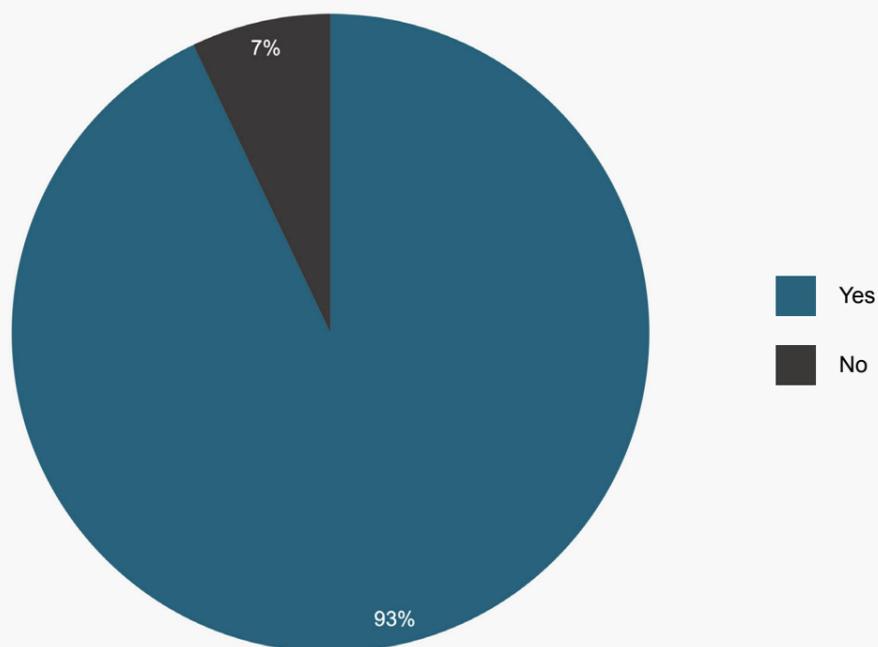
7.3 Volunteer Numbers

Among organisations that have volunteers, a total of 6,015 active volunteers were reported, which translates to an average of 23.4 active volunteers per organisation.

Breaking it down by organisational type:

- Art galleries reported an average of **28.4 active volunteers**.
- Museums reported an average of **21.9 active volunteers**.
- Heritage organisations reported an average of **22.5 active volunteers**.
- Aboriginal cultural organisations reported an average of **20.1 active volunteers**.

Do you have volunteers?



7.3 Volunteer Hours

On average, respondents reported a total of 85 volunteer hours per week, or 1,060,800 hours contributed annually across the sector in the reporting period. This equates to a Volunteer Replacement Cost totalling \$50,175,840 (figure generated from The Centre for Volunteering).

On average, how many volunteer hours are given each week to the following areas?

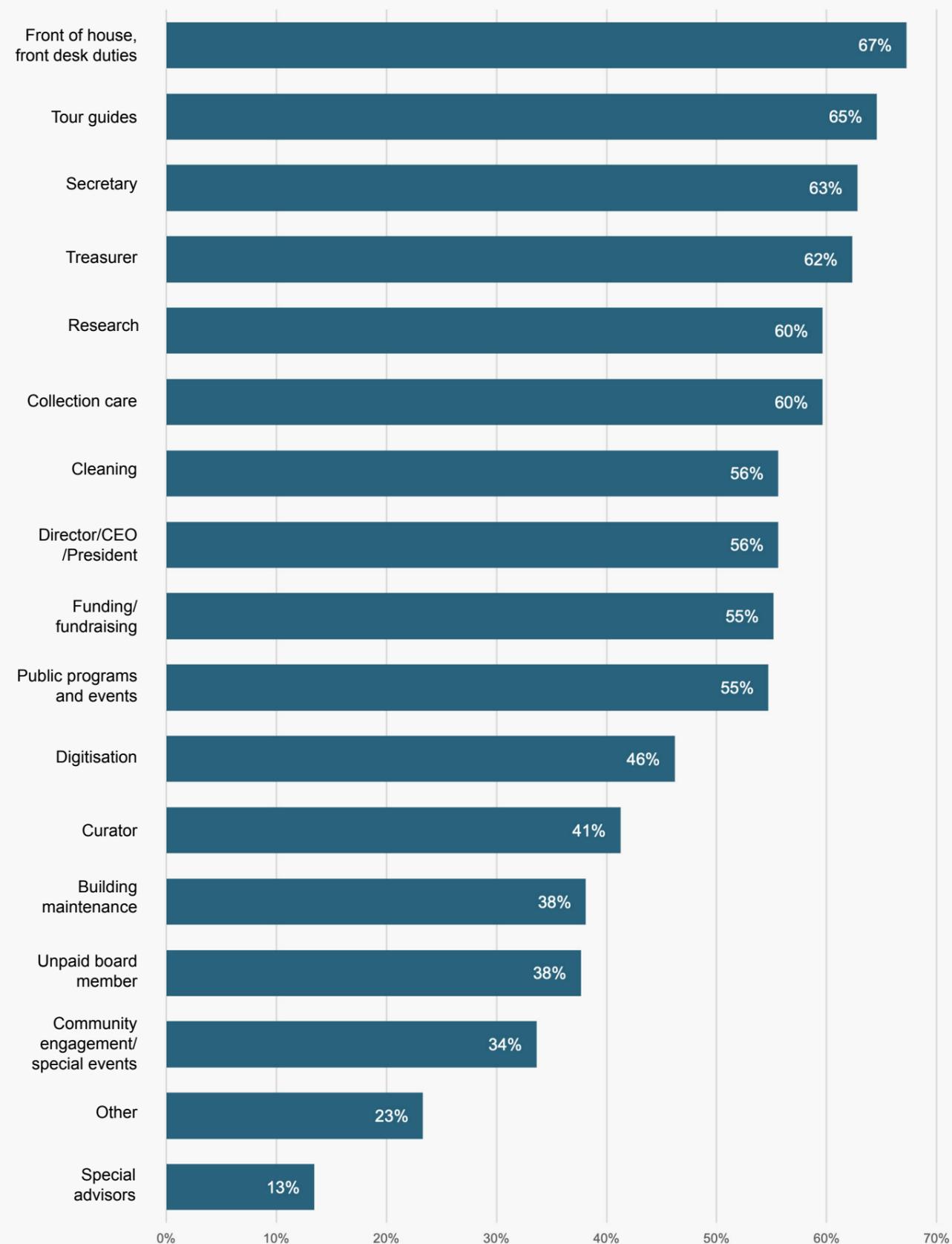
Area	Average Weekly Hours
Ensuring the organisation is open and staffed including front of house and ticketing	35.83
Governance, general operations and maintenance	15.35
Collection care including cataloguing and digitisation	9.99
Engagement programs, tours, school groups and community days	6.55
Exhibition development and installation	6.43
Fundraising and grant applications	4.36
Other activities	9.27



Volunteers at the Wollondilly Heritage Centre with Standard Program assessor Tamara Lavrencic, 2022. Photo by Joanna Nicholas.

7.3 Volunteer Roles

What roles do your volunteers fulfill?



8.0 FUNDING

Organisations increasingly depend on self-generated income. Among the common income streams, 56% of organisations rely on entry fees, while 48% rely on membership fees. Private benefaction in the form of donations or sponsorships is also significant, with 36% of organisations reporting it as a source of income.

This reliance on various income sources makes organisations vulnerable to shocks in tourism, as demonstrated by the impact of events like the Covid-19 pandemic and natural disasters affecting local tourism. Such shocks can significantly affect their financial stability.

Furthermore, 47% of respondents identified a lack of funding as a threat to their collection, highlighting the ongoing challenge of securing sufficient financial resources for the sector.

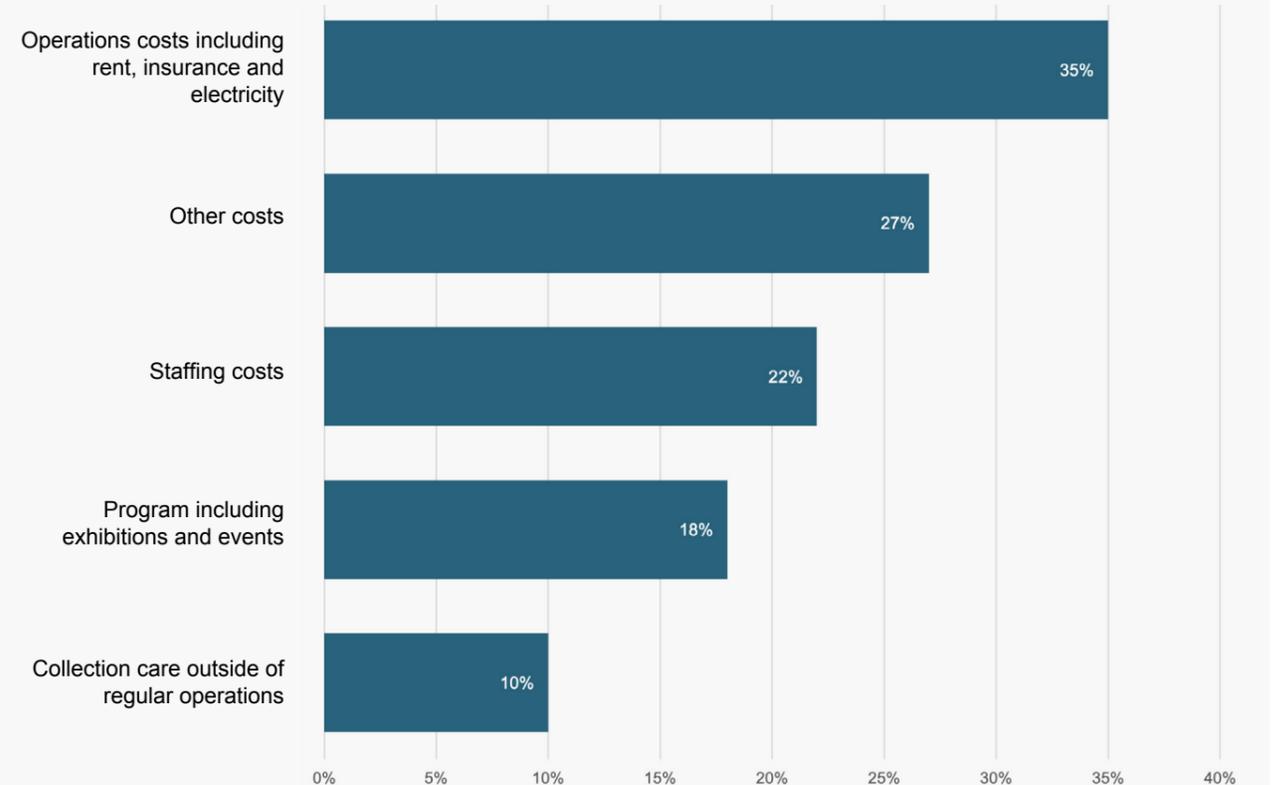
8.1 Budgets

The average annual operational budgets varied significantly across different types of organisations within the sector. Art galleries had the highest average annual operational budget, with an average of \$897,046. Museums had an average annual operational budget of \$205,631. This averaging includes community and volunteer run museums.

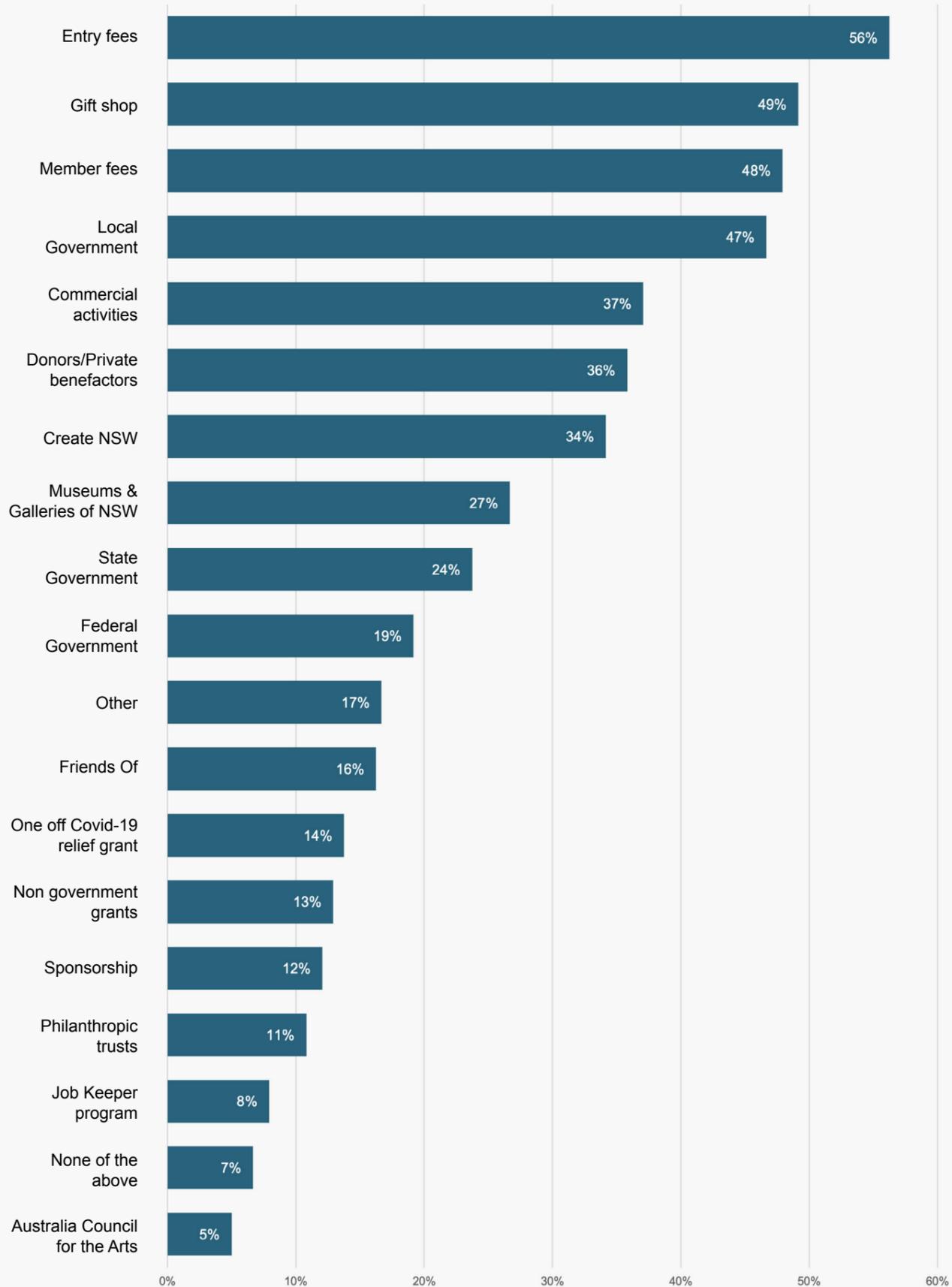
Heritage organisations had an average annual operational budget of \$143,138. Aboriginal Cultural Organisations had an average annual operational budget of \$543,857. It is worth noting that 38.5% of organisations reported an annual operational budget of \$20,000 or less. This was mainly the volunteer operated sector.

Additionally, 18% of organisations reported that they had no allocated annual operational budget. These figures highlight the significant disparity and inequality in operational budgets across the sector.

How do you spend your operational budget?



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



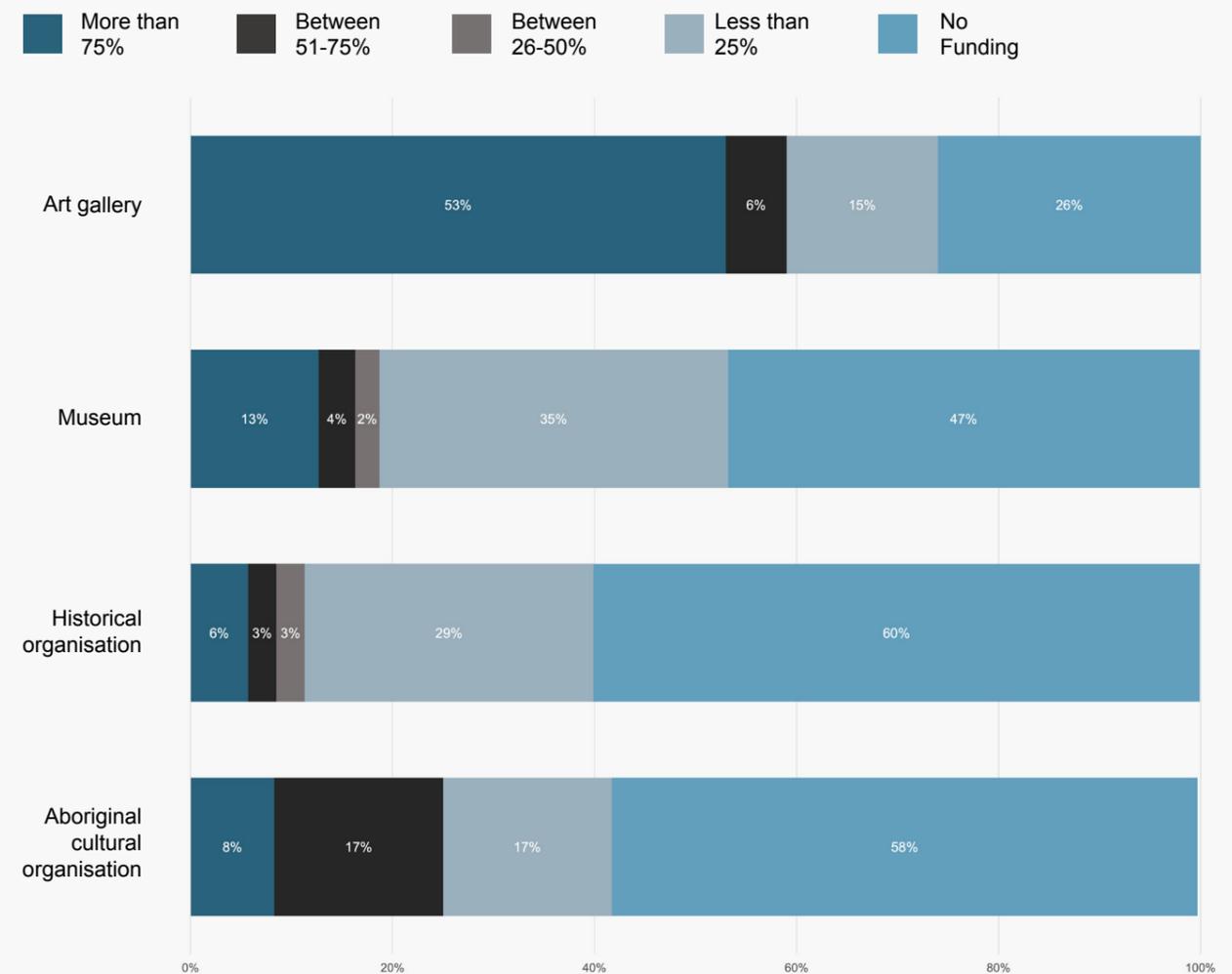
8.2 Local Government Funding

When asked about the percentage of their budget provided by Local Government Agencies (LGA), including cash funding, offset rent, borrowed staff, and one-off grants, the following information was obtained:

- 41% of respondents reported receiving no LGA funding support.
- 29% received less than a quarter of their funding from LGAs.
- 6% reported receiving between half to three-quarters of their funding from LGAs.
- 20% stated that their primary source of income (75% or more) came from LGAs, down from 30% in 2013.

These figures provide insights into the varying levels of LGA funding support across different types of organisations within the sector. *Note: Our finding shows that those reporting 50% or more LGA funding are Council run museums.*

Estimate the percentage of your budget provided by Local Government. Filtered by organisation type.



9.0 SUSTAINABILITY

Over half of organisations (more than 50%) reported actively pursuing environmental sustainability through various initiatives. This demonstrates a growing commitment to sustainability within the sector.

- 41% of organisations have implemented sustainable energy programs, and within this group, 29% have installed solar panels to harness renewable energy.
- 19% of organisations have implemented measures to reduce water usage, such as utilising rainwater tanks and implementing greywater recycling systems.
- 18% of organisations have implemented initiatives to reduce waste generation. However, it's worth noting that 42% of organisations currently do not have any sustainability measures in place or planned.

Do you currently have any sustainability and/or environmental initiatives?

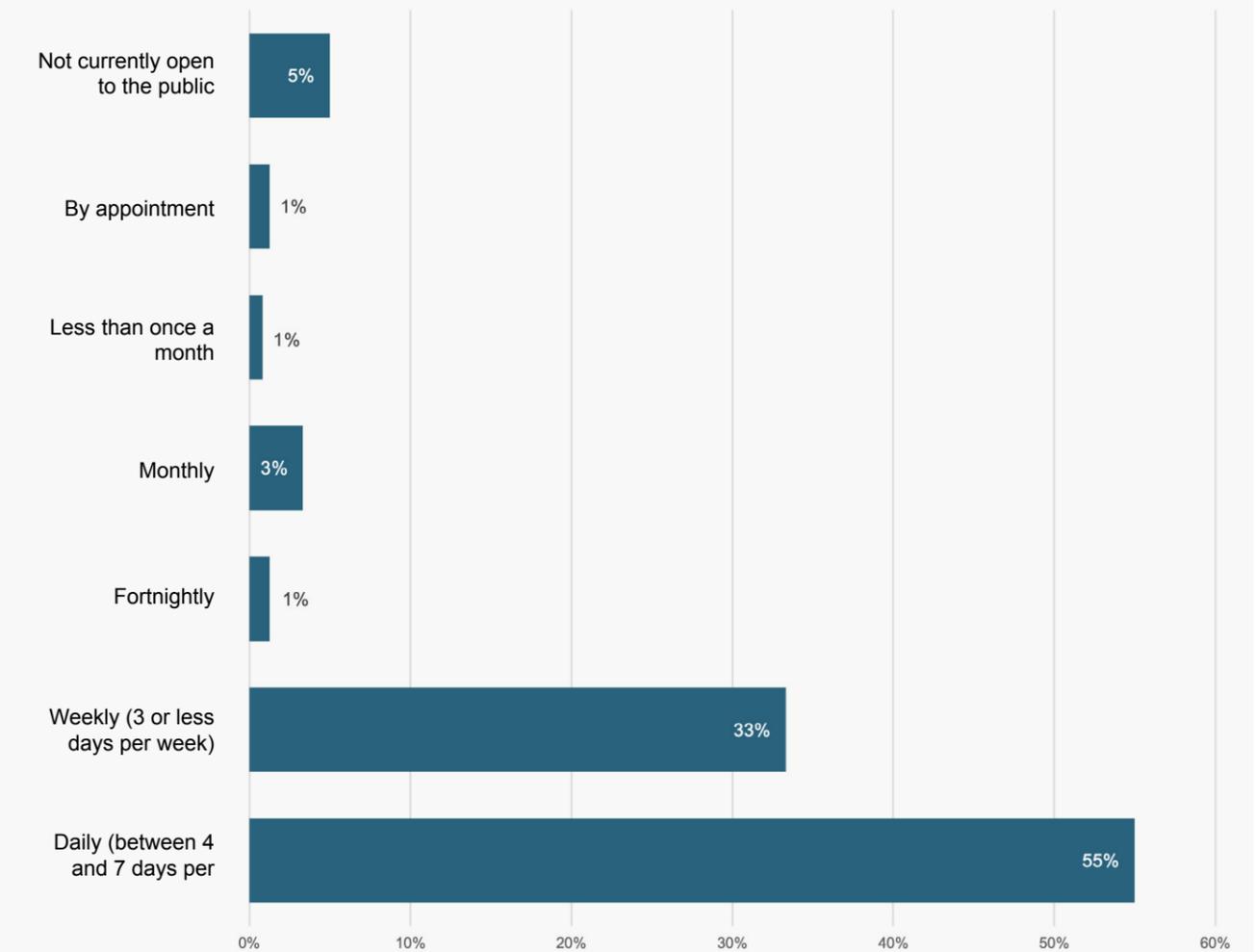
We do not currently have any sustainability measures planned	43%
Solar panels on building	29%
Water tanks and/or grey water use	19%
We are currently looking into adopting environmental sustainability measures	19%
We have an attached garden or greenspace that could be utilised for sustainability projects	19%
Composting or other waste reduction programs	18%
Policy on sustainable exhibition and archive materials	10%
Green energy provider	8%
Other renewable energy initiative	5%
Partnership with an environmental agency	4%
Carbon offset program	1%



Zanny Begg, *These Stories Will be Different*, installation view at Plimsoll Gallery, University of Tasmania, 2022. A UNSW Galleries and Museums & Galleries of NSW touring exhibition. Photo by Collings Creative.

10.0 OPENING HOURS

How often are you open to the public?



10.1 Covid-19 Pandemic Impacts

M&G NSW continues to monitor the operational effects that the pandemic has exacted on the sector.

Organisations reported that, on average, they were closed for approximately 15 weeks, which accounts for around 29% of their last 12-month reporting period. This indicates a significant impact from the Covid-19 pandemic, leading to temporary closures and disruptions in operations.

Regarding operating hours following the lockdowns, the majority of organisations (72%) stated that they are operating about the same number of hours as they did prior to the pandemic. This suggests a degree of stability in their operations, with a relatively smooth transition back to pre-pandemic operating levels.

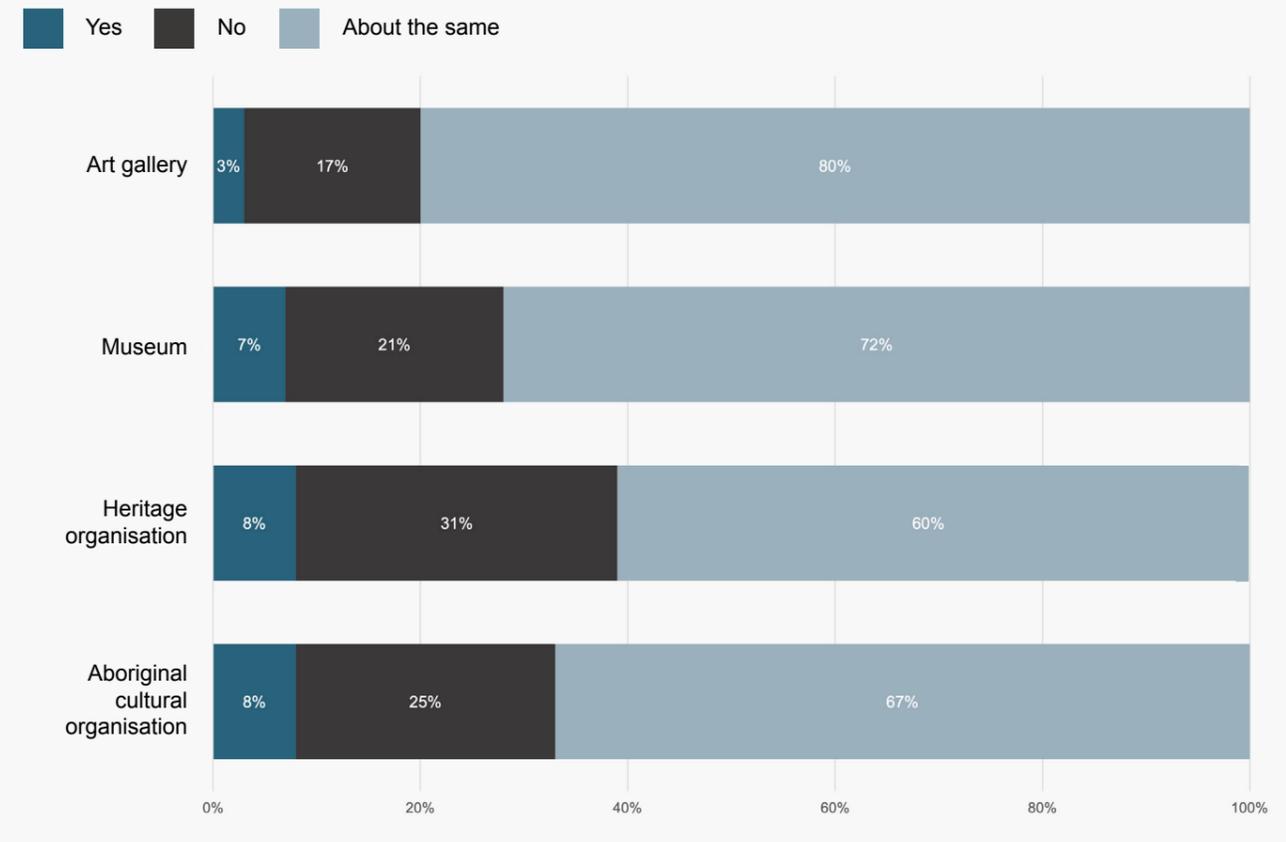
Approximately 21% of organisations reported operating fewer hours compared to before the pandemic. This reduction may be a result of various factors, such as staffing and volunteer availability, reduced visitor demand, or ongoing health and safety considerations.

On the other hand, a small percentage of organisations (around 7%) reported opening more hours than they did prior to the pandemic. This could be attributed to various factors, including efforts to accommodate

increased visitation, adapt to changing audience needs, or implementing new strategies for engagement.

Overall, while the majority of organisations have been able to maintain their pre-pandemic operating hours, it is important to recognise that a significant portion of the sector has experienced reduced hours or closures. The ongoing impact of the pandemic on operating hours and operations as a whole highlights the resilience and adaptability required in navigating these challenging circumstances.

Opening hours, is this more or less than before the Covid-19 Pandemic? Filtered by organisation type.



Video projection and video mapping workshop at Bathurst Regional Gallery, 2022. A *Let's Get Digital* program, supported by the NSW Government through Create NSW as part of Arts Restart. Photo by Jason Gee.

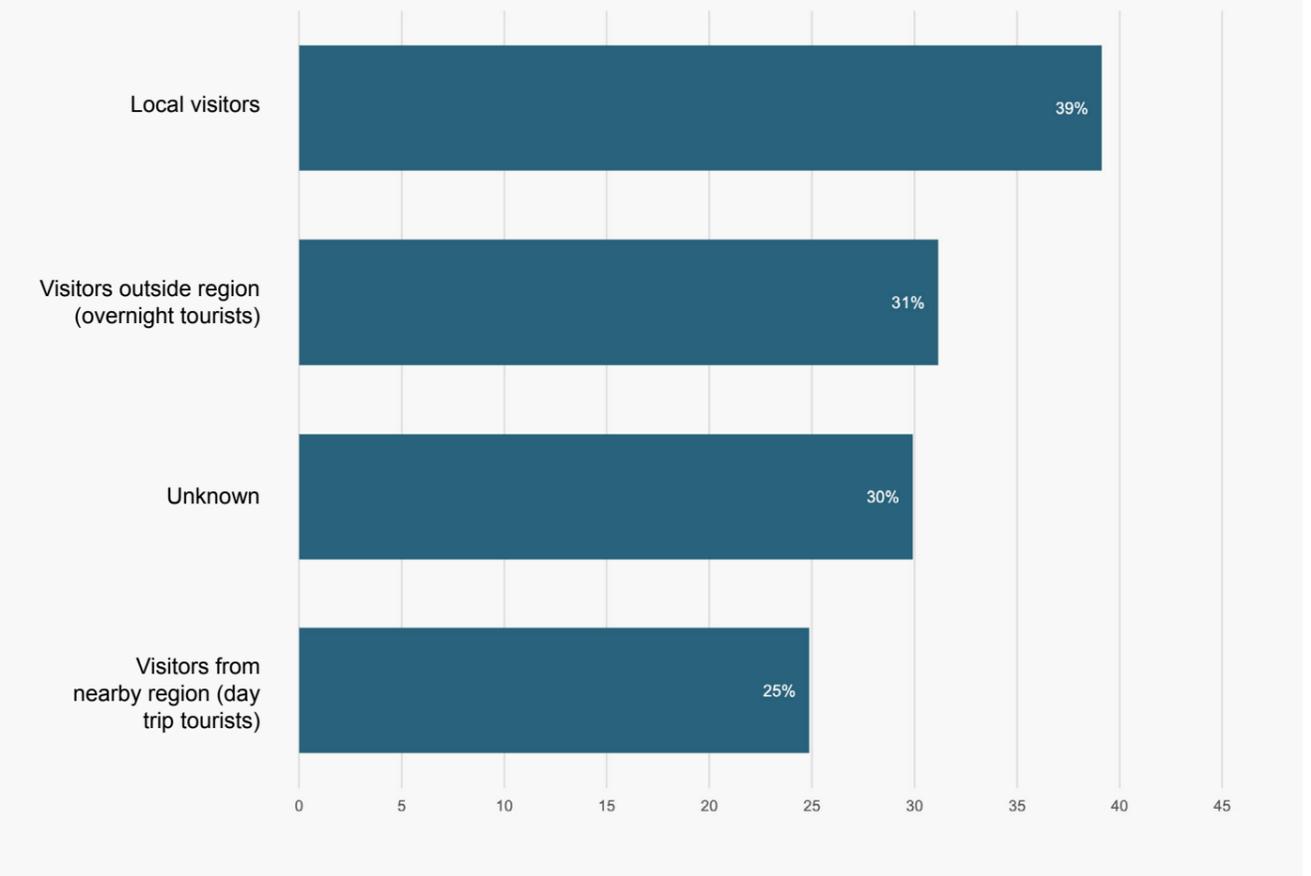
11.0 VISITATION

The majority of organisations (66%) currently record their visitation numbers, indicating that they actively track and monitor the number of visitors they receive. However, it is important to note that this percentage has decreased from the 2018 census, with 84% of organisations reported recording visitation numbers.

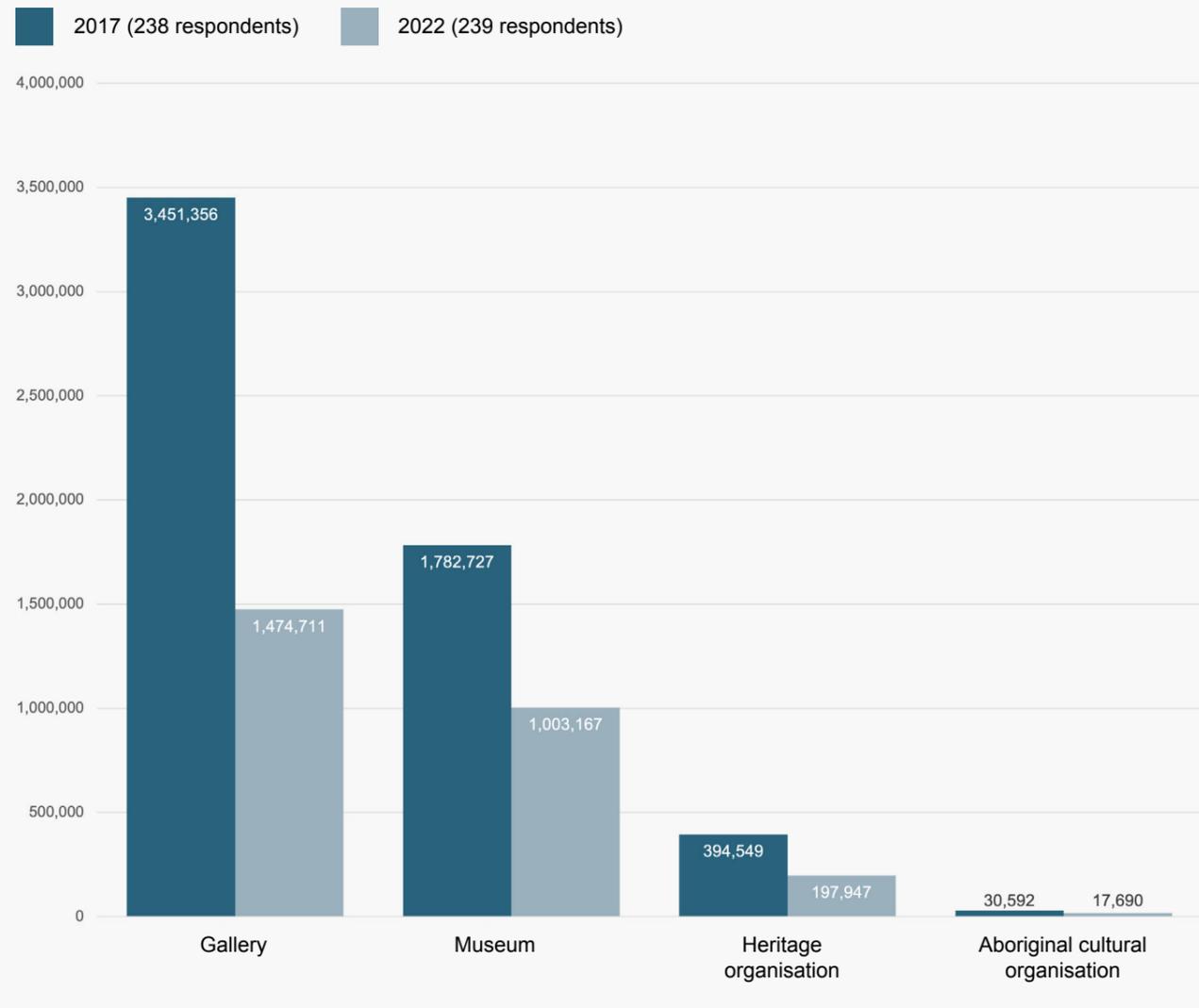
The decrease in the percentage of organisations recording visitation numbers since 2018 raises potential concerns about the availability of accurate and up-to-date data on visitor engagement. Monitoring visitation numbers is crucial for understanding audience reach, assessing the impact of programs and exhibitions, and making informed decisions regarding resource allocation and planning.

Visitation in the reporting period was 2,693,515, 52% lower when compared to 2018 Census figures. This significantly lower figure can be attributed to Covid-19 lockdowns, event capacity restrictions and difficulty planning and delivering events.

Of the visitors during your last annual reporting period please provide estimates of visitor types.



Please advise the number of visitors in the last annual reporting period.



M&G NSW Peers at the In the Studio event at Parramatta Artists' Studios, 2022. Photo by Jacquie Manning, courtesy of Parramatta Artists' Studios.

12.0 PROGRAMMING

12.1 Exhibitions

When asked, 'how many exhibitions do you hold each year', respondents reported 1,198 temporary exhibitions, 298 exhibition suite changeovers and 2,099 permanent and long-term exhibitions currently on display.

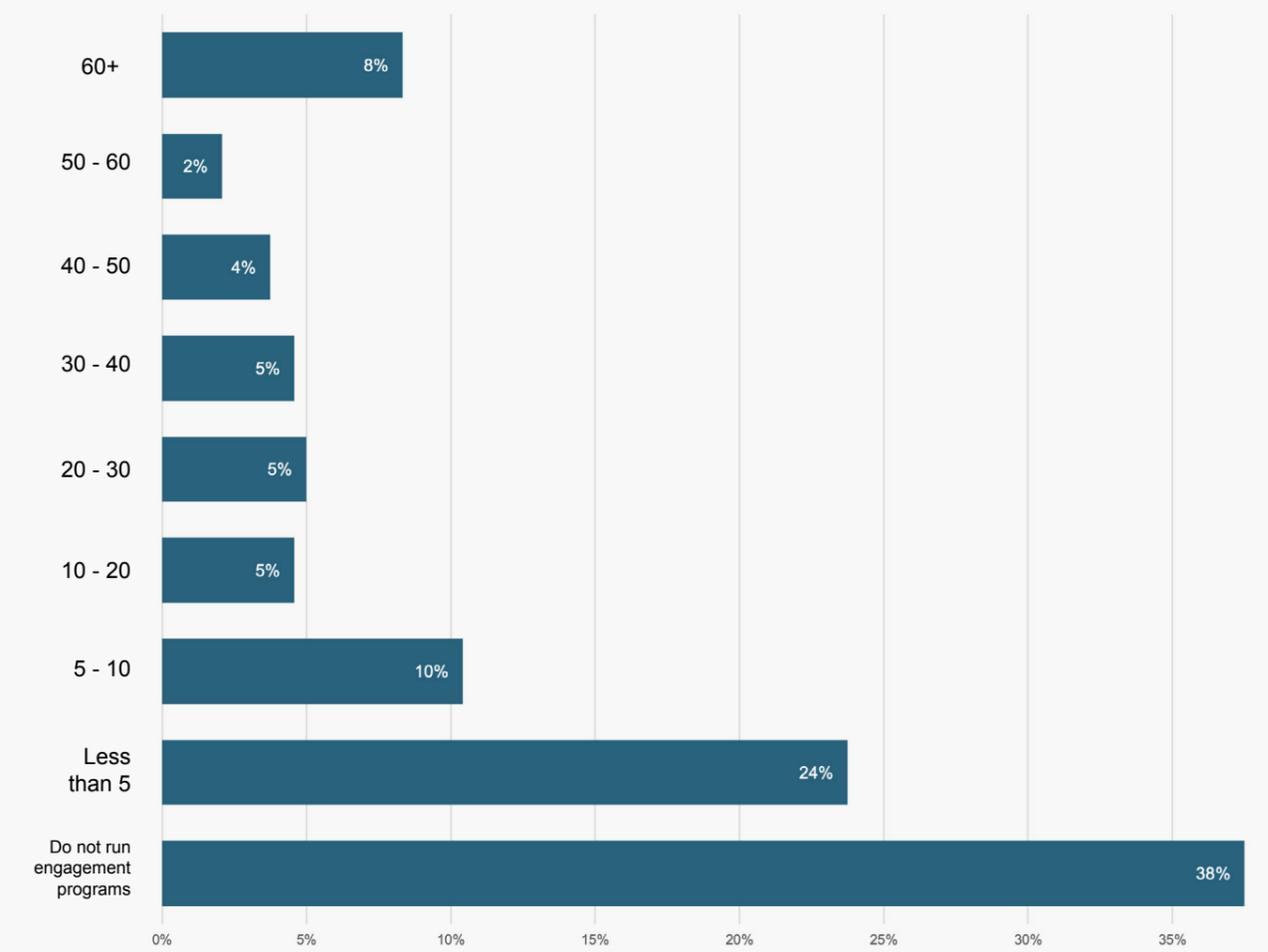
12.2 Engagement

When asked, 'how many participants did you have across engagement and outreach programs during your last annual reporting period', respondents reported approximately 270,104 participants.

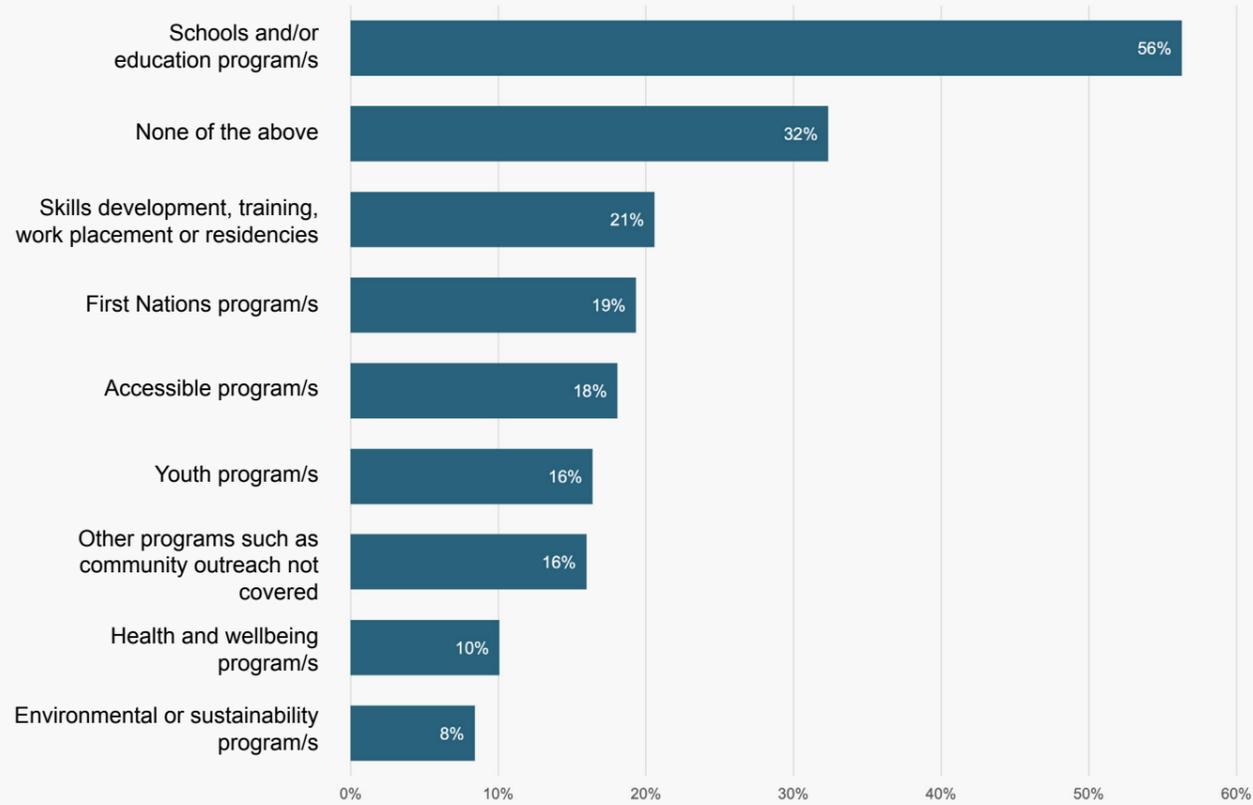
68% of organisations partner with other organisations to deliver a range of engagement programs. A significant portion of the sector recognises the importance of collaborating with educational institutions to provide enriching experiences for students and young learners.

Of the organisations that reported not running engagement programs in any capacity: 8% of galleries do not, 17% of Aboriginal cultural centres do not, 37% of heritage organisations do not and 50% of museums do not. 50% of all respondents reported not having engagement programs outside of physical visits.

How many engagement programs do you run each year?

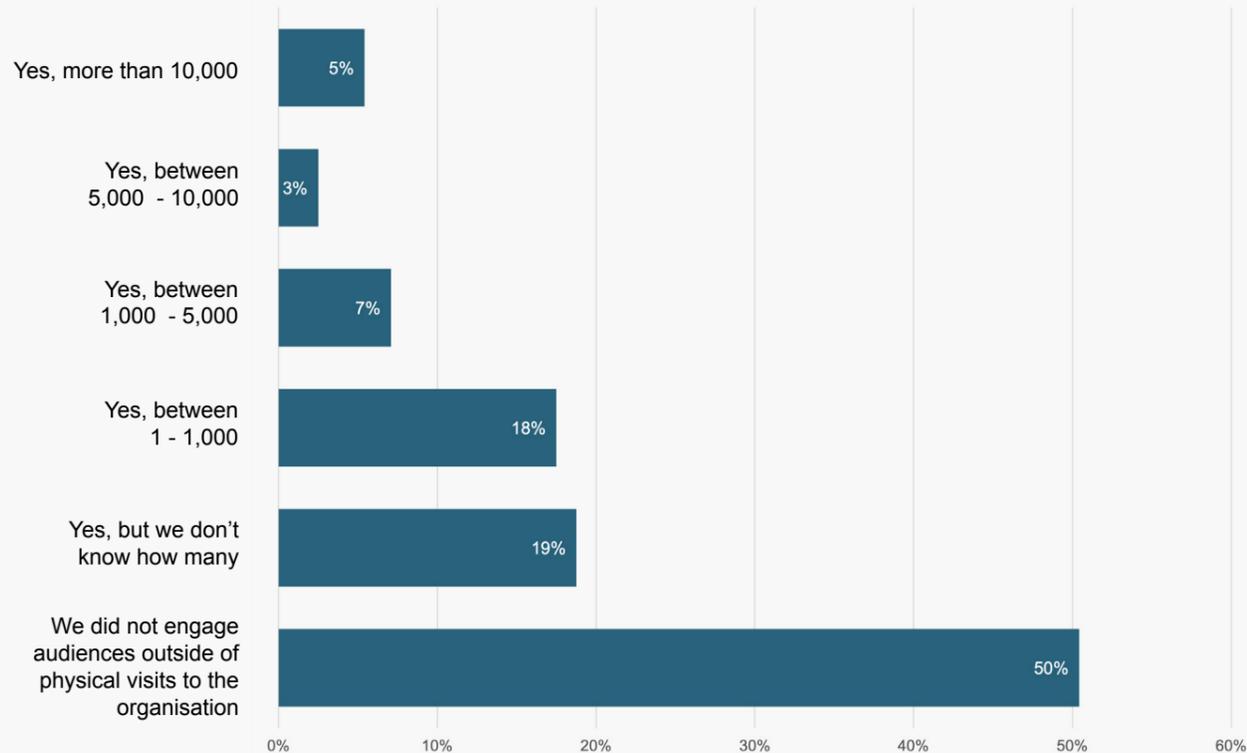


Do you currently partner with other organisations or groups to offer the following?



Note: 470 responses from 238 organisations.

Did you engage audiences outside of physical visits to the organisation?

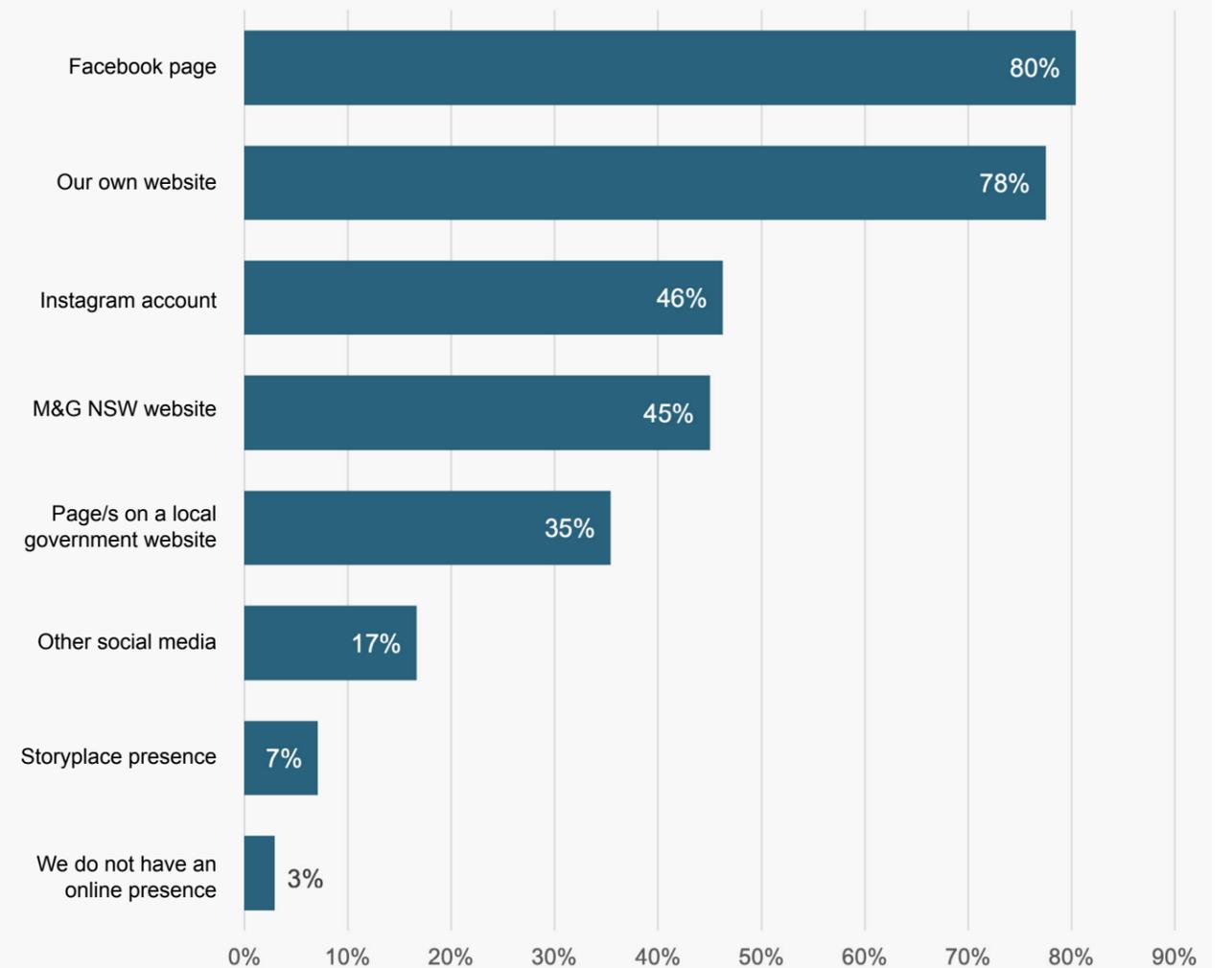


13.0 DIGITAL

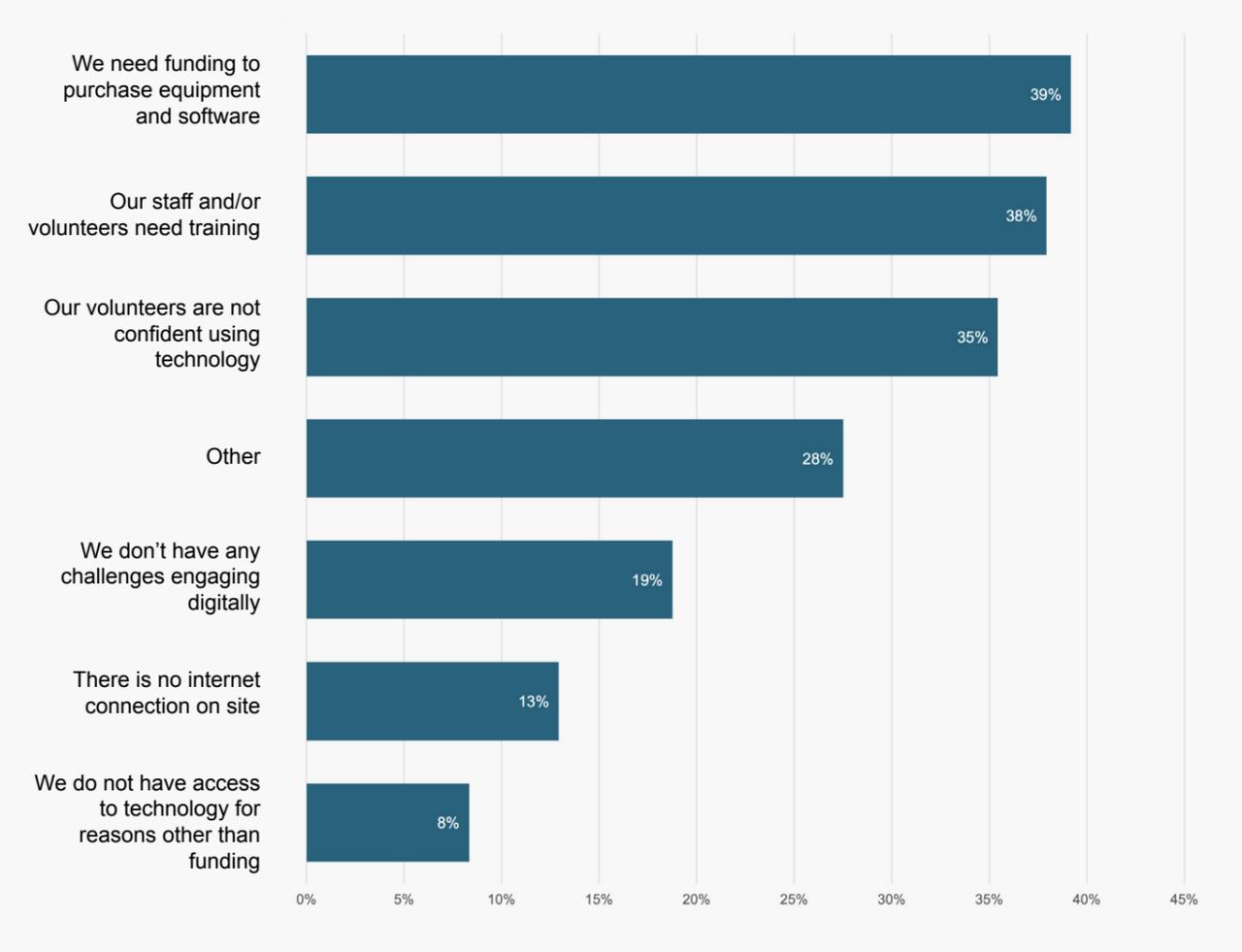
When asked about the challenges their organisations face in engaging audiences digitally, several key issues were highlighted:

- Staff and volunteer training: 38% of respondents indicated that their staff and volunteers require training to effectively engage audiences digitally. This suggests a need for upskilling and professional development opportunities to enhance digital literacy and competence.
- Funding for equipment and software: 39% mentioned that they require funding to purchase necessary equipment and software for digital engagement. Acquiring the right tools and technology can be a significant barrier for some organisations.
- Volunteer confidence in using technology: 35% reported that their volunteers lack confidence in using technology, which may hinder their ability to engage audiences digitally.
- Lack of internet connection on site: 13% of respondents reported the absence of an internet connection on site.
- 19% responded that they don't have any challenges in engaging digitally.

What online presence does your organisation have?



What challenges does your organisation face in engaging digitally?



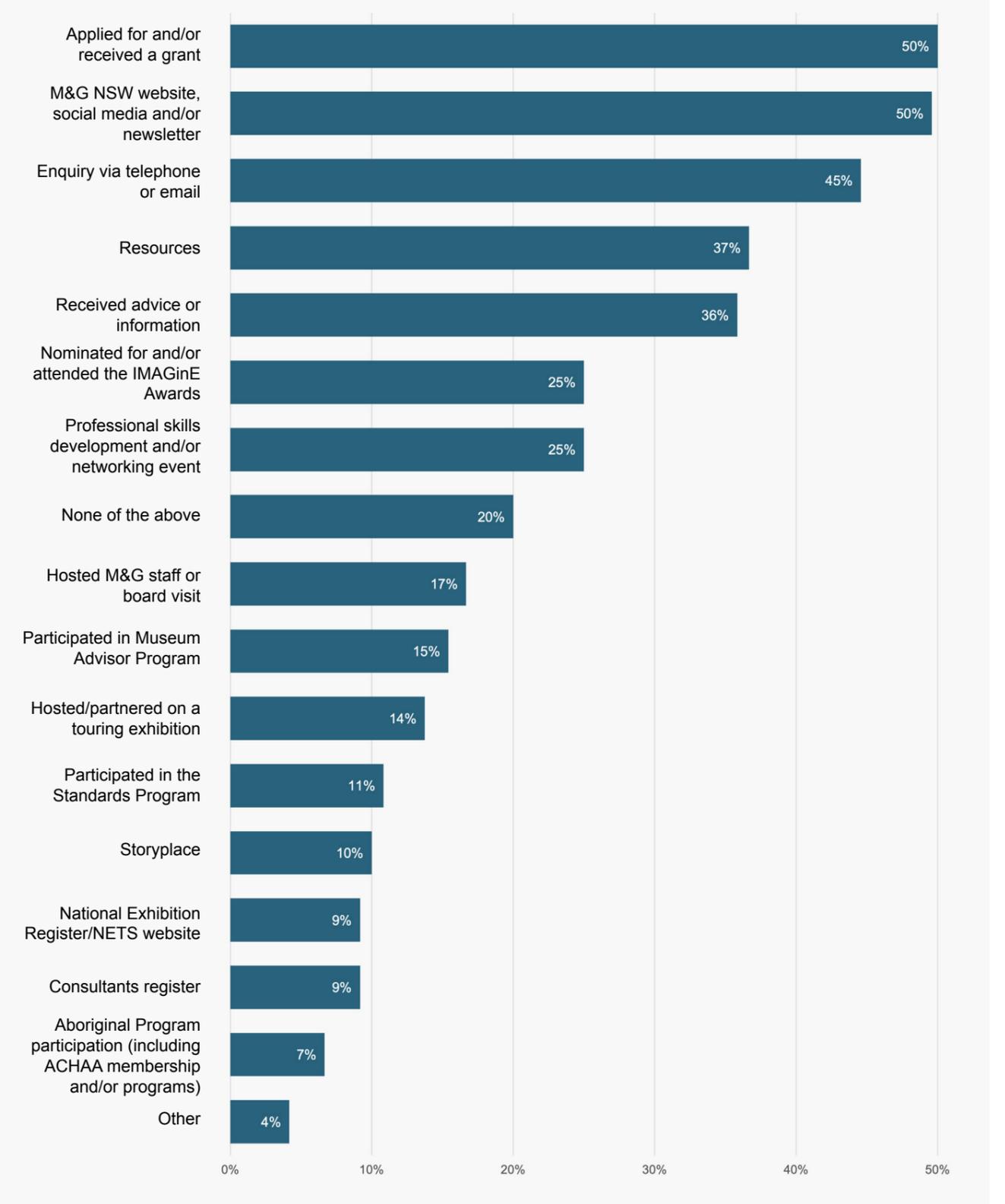
13.1 Social Media

The majority of organisations, 89% are actively utilising social media channels for promotion and engagement. Specifically, 77% are using social media to promote exhibitions and events, while 76% use it to engage with their local communities. Additionally, 54% share highlights from their collections through social media platforms. However, it's worth noting that 12% of organisations view social media as an alternative to having a website, and 11% are not using social media in any capacity.

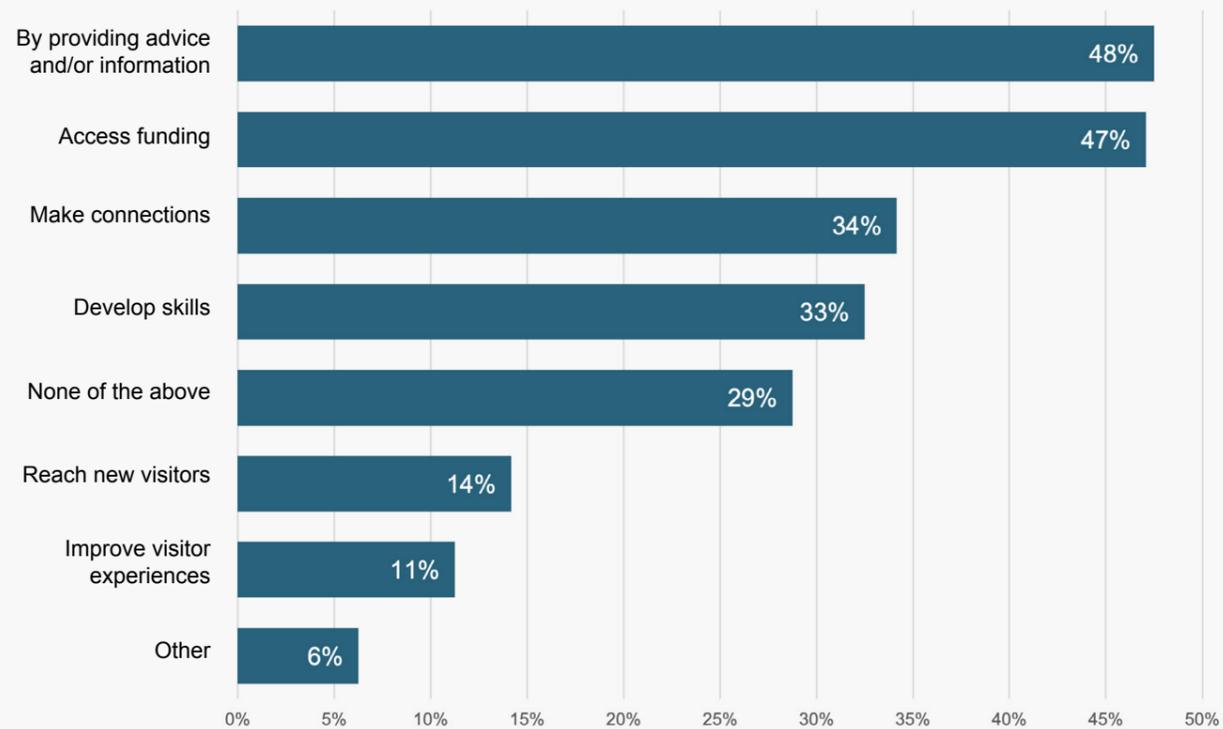
14.0 MUSEUMS & GALLERIES OF NSW

In concluding, organisations were surveyed on their engagement with Museums & Galleries of NSW in the past four years.

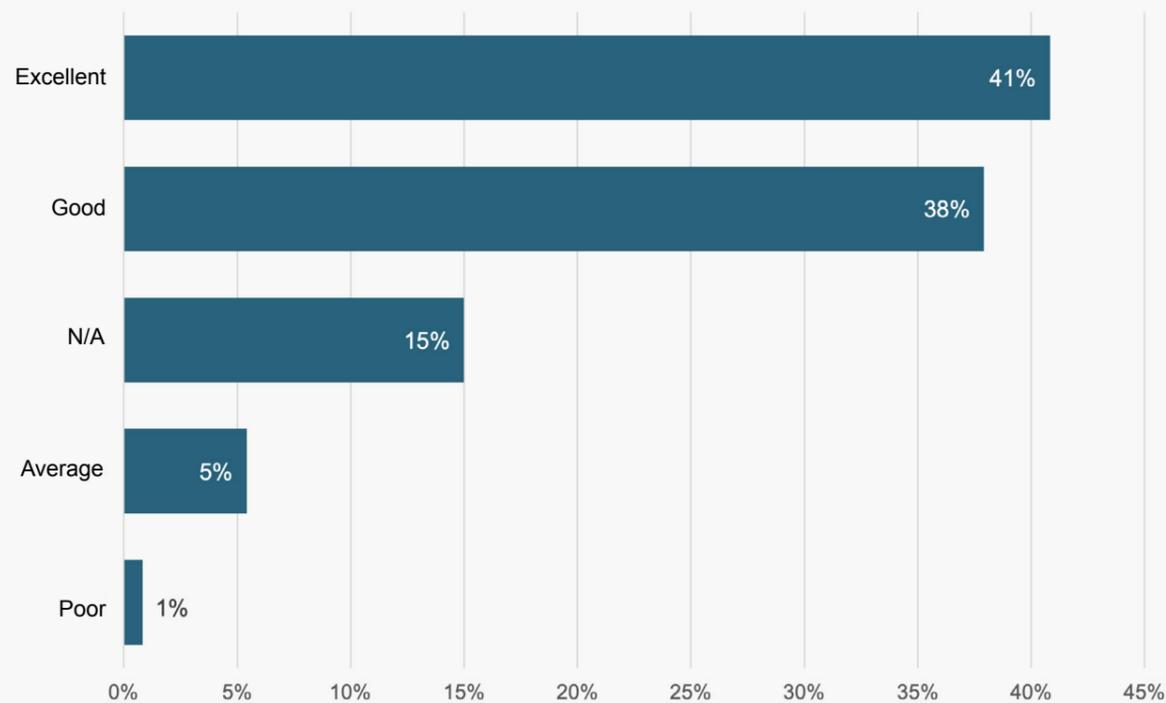
Has your organisation engaged with any of the following Museums & Galleries of NSW (M&G NSW) services in the past 4 years?



Have Museums & Galleries of NSW helped your organisation do any of the following in the last five years?



How would you rate M&G NSW services overall?



M&G NSW's IMAGinE Awards 2022 at Chau Chak Museum, The University of Sydney. Photo by Lucy Parakhina.

**Museums
& Galleries
of NSW**



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