

Museums

One hundred and eighty Museums participated in the 2019 Digital Culture survey which evaluates how arts and cultural organisations in England use digital technology. They include Museums of different sizes from across England, giving us a picture that reasonably reflects how the Museums sector is using technology to support its work.¹

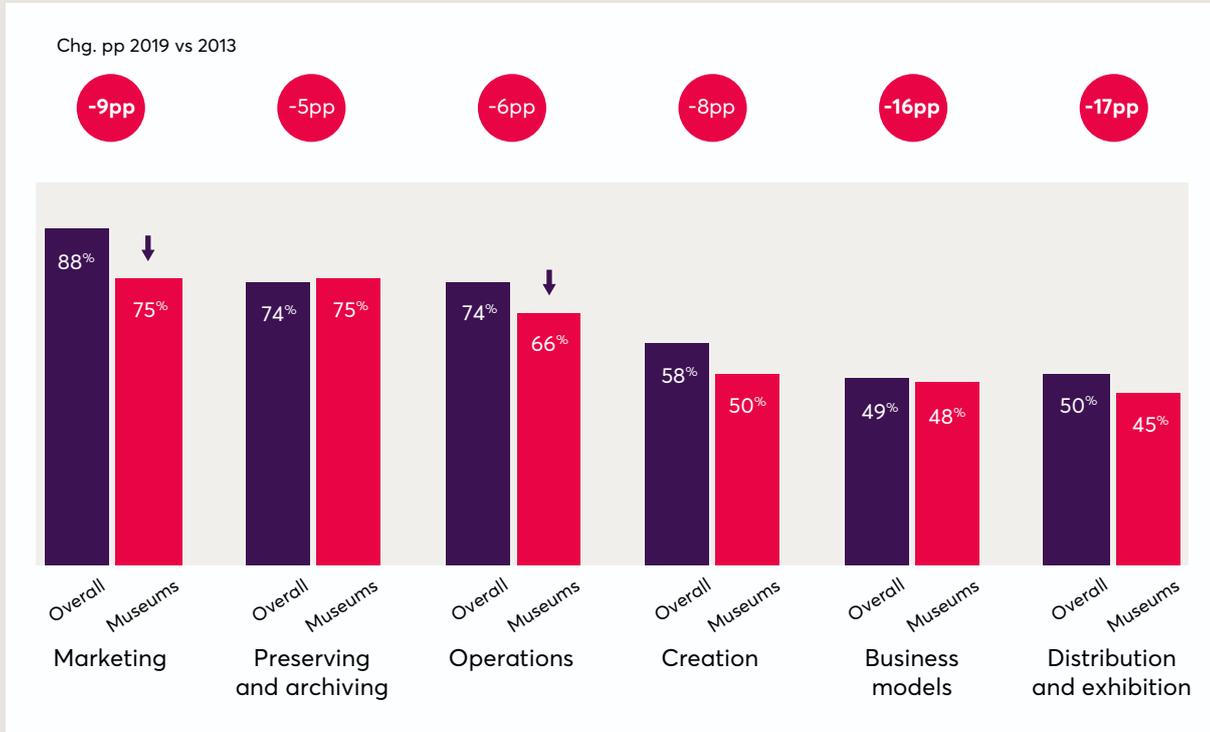
Importance of digital technology

Most important for	→	Marketing and preserving and archiving
Least important for	→	Business models

The areas of business where most Museums consider digital technology to be essential/important are marketing (75 per cent of Museums consider it to be essential/important compared to 88 per cent of the overall sector) and preserving and archiving (75 per cent of Museums vs 74 per cent of the sector).²

Museums are less likely than the sector overall to consider digital technology to be essential/important for five out of the six business areas tested in the survey. The two areas with the most significant difference are marketing (75 per cent of Museums vs 88 per cent of the sector) and operations (66 per cent of Museums vs 74 per cent of the sector).³

Figure 1: Importance of digital (essential/important) to different areas – whole sector vs Museums, 2019



How important is digital technology to your organisation overall, at the present time, in each of the following areas? 'Chg. pp' = Change in percentage points. Statistically significant changes 2013–2019 (at a 95 per cent confidence level) highlighted in bold. Arrows show statistically significant differences vs whole sector.

Base: 2019 – all respondents (n = 1,113), 2019 – Museums (n = 177); 2013 – Museums (n = 118).

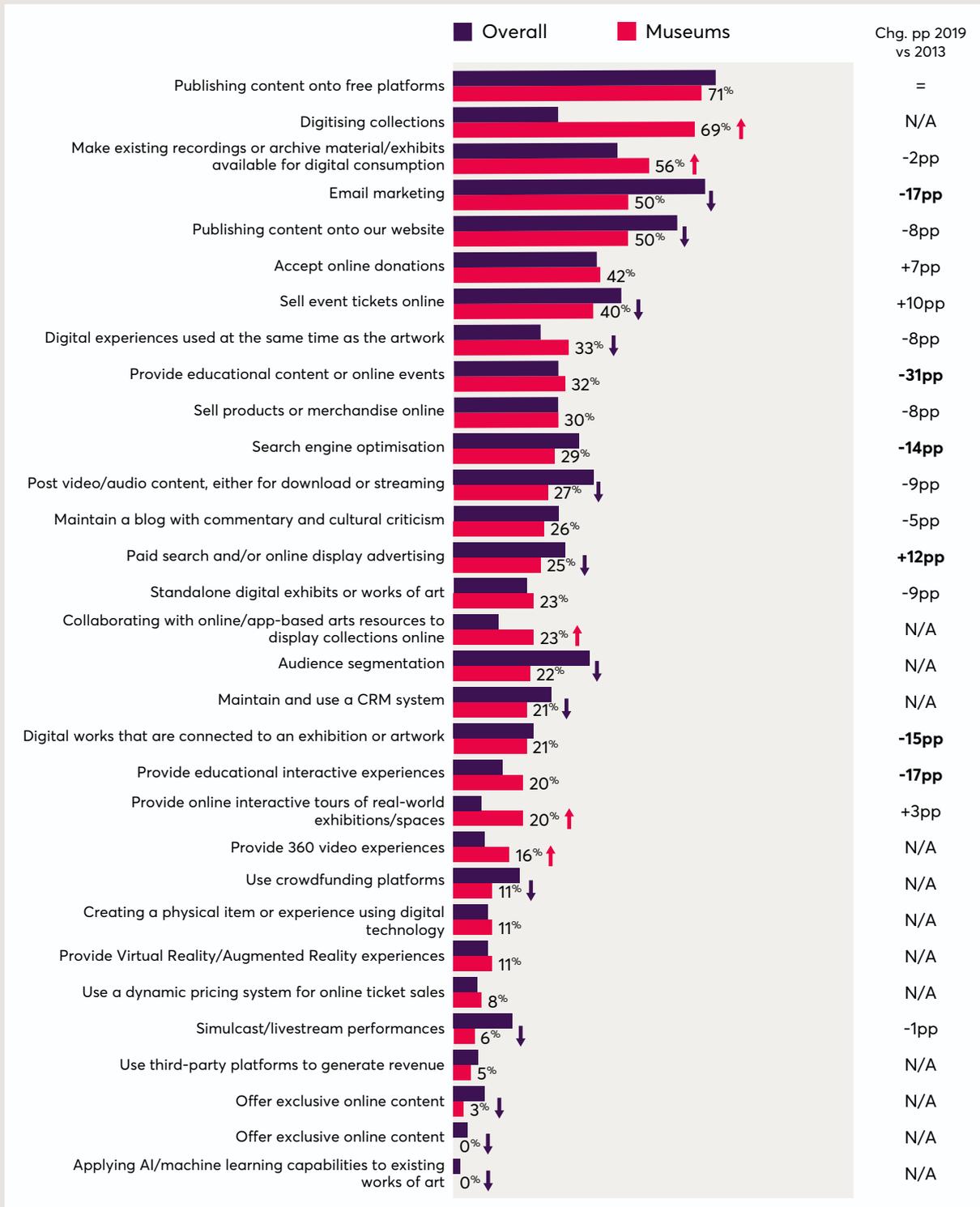
For both Museums and the sector overall, perceptions of digital being essential/important have declined since 2013 across all business areas apart from business models; 32 per cent of Museums considered digital to be essential/important for this area in 2013 compared to 48 per cent in 2019. This closely reflects the pattern in the overall sector, where 34 per cent of organisations perceived business models to be essential/important in 2013 compared to 49 per cent in 2019.⁴ The business area that has seen the biggest decline since 2013 is distribution and exhibition (which is the same as the sector overall); 45 per cent of Museums now say digital is essential/important for this area compared to 62 per cent in 2013 (50 per cent of the sector in 2019 vs 62 per cent in 2013).

Digital activities

<p>Top digital activities →</p>	<p>Publishing content on free platforms, digitising collection make existing recordings available for digital consumption</p>
<p>More likely than other other artforms to do... →</p>	<p>Digitising collections, provide online interactive tours</p>

Museums are slightly less diverse in the types of digital activities they do compared to the sector overall. In 2019, Museums engaged in an average of 7.7 activity types listed in the survey, compared to 8.2 amongst the sector. The most common digital activity type among Museums, publishing content on free platforms (70 per cent), is also the most common activity amongst the sector overall. After this, the next two activity types that most Museums engage in relate to digitisation: 69 per cent of Museums engage in digitising collections and 56 per cent in making existing recordings or archive material/exhibits available for digital consumption. Museums are much more likely than the sector overall to engage in these types of activity. Unsurprisingly, the other types of activity that are much more common for Museums relate to making collections more accessible. For example, 23 per cent of Museums collaborate with online/app-based arts resources to display collections online in digital form compared to 13 per cent of the sector overall.⁵

Figure 2: Digital activity types for Museums vs overall sector 2019 (and change from 2013)



Now thinking about your organisation's digital activities, please indicate which of the following your organisation currently does. 'Chg. pp' = Change in percentage points. Statistically significant changes 2013–2019 (at a 95 per cent confidence level) highlighted in bold. Arrows show statistically significant differences vs whole sector. N/A is stated where question was not asked in 2013.

Base: 2019 – all respondents (n = 1,134), 2019 – Museums (n = 188); 2013 – Museums (n = 118).

Since 2013, the digital activities of Museums have become slightly less diverse, with the average number of activity types falling from 8.8 in 2013 to 7.7 in 2019. Most of the thirty-one digital activity types tested in the survey have declined amongst Museums over this period. Only four activity types have trended upwards: paid search and/or display advertising (13 per cent of Museums did this in 2013 vs 25 per cent in 2019), selling event tickets online (30 per cent vs 40 per cent), accepting online donations (35 per cent vs 42 per cent) and providing online interactive tours of real-world exhibitions/spaces (17 per cent vs 20 per cent).⁶

Museums are less likely than the sector overall to have a mobile-optimised web presence (65 per cent of Museums, compared to 73 per cent overall).⁷ However, the proportion of Museums with a mobile-optimised presence has increased a great deal since 2013, from 29 per cent to 65 per cent.⁸

Of the fifteen social media platforms listed in the survey, Museums on average use slightly fewer than the sector overall (3.3 amongst Museums vs 4.2 amongst the whole sector). As with the sector overall, Facebook remains the platform most used by Museums (92 per cent of both Museums and the sector overall have an active profile). The next most common platforms amongst Museums are Twitter (80 per cent vs 83 per cent for the sector) and Instagram (46 per cent vs 65 per cent).⁹

Since 2013, the use of Instagram by Museums has consistently been lower than the overall sector, with the difference increasing over time: from 5 percentage points in 2013 (12 per cent of Museums vs 7 per cent for the sector), to 13 percentage points in 2017 (35 per cent of Museums vs 48 per cent of the sector) and 19 percentage points now (46 per cent of Museums vs 65 per cent of the sector).¹⁰ This could perhaps indicate that Museums are less responsive than the sector as a whole to emerging trends in social media.

Museums are marginally less likely than the sector overall to engage in data-driven activities (4.0 activity types vs 4.3 amongst the sector). In 2019, Museums exceeded the sector in only three of the fifteen data-led activities we tested. These are using data to benchmark our organisation against others (30 per cent of Museums vs 21 per cent amongst the sector), using data to understand our audience better through data analysis, segmentation and/or profiling (48 per cent vs 43 per cent) and using analytics and insight from audience/visitor data to improve our website (42 per cent vs 39 per cent). Conversely, Museums are less likely than the sector overall to use audience/visitor data to personalise and tailor different marketing (21 per cent vs 31 per cent).¹¹

Amongst Museums, all the data-led activities tested have declined successively in each survey since 2013. The most notable declines are in using data to inform the broader strategic direction of our organisation (57 per cent in 2013 vs 33 per cent in 2019) and using audience/visitor data to personalise and tailor different marketing, sales and/or fundraising campaigns for different types of user (36 per cent in 2013 vs 21 per cent in 2019).¹² The sector overall has also seen declines in these data-led activities across the same period, but to a lesser degree.

The positive impact of digital

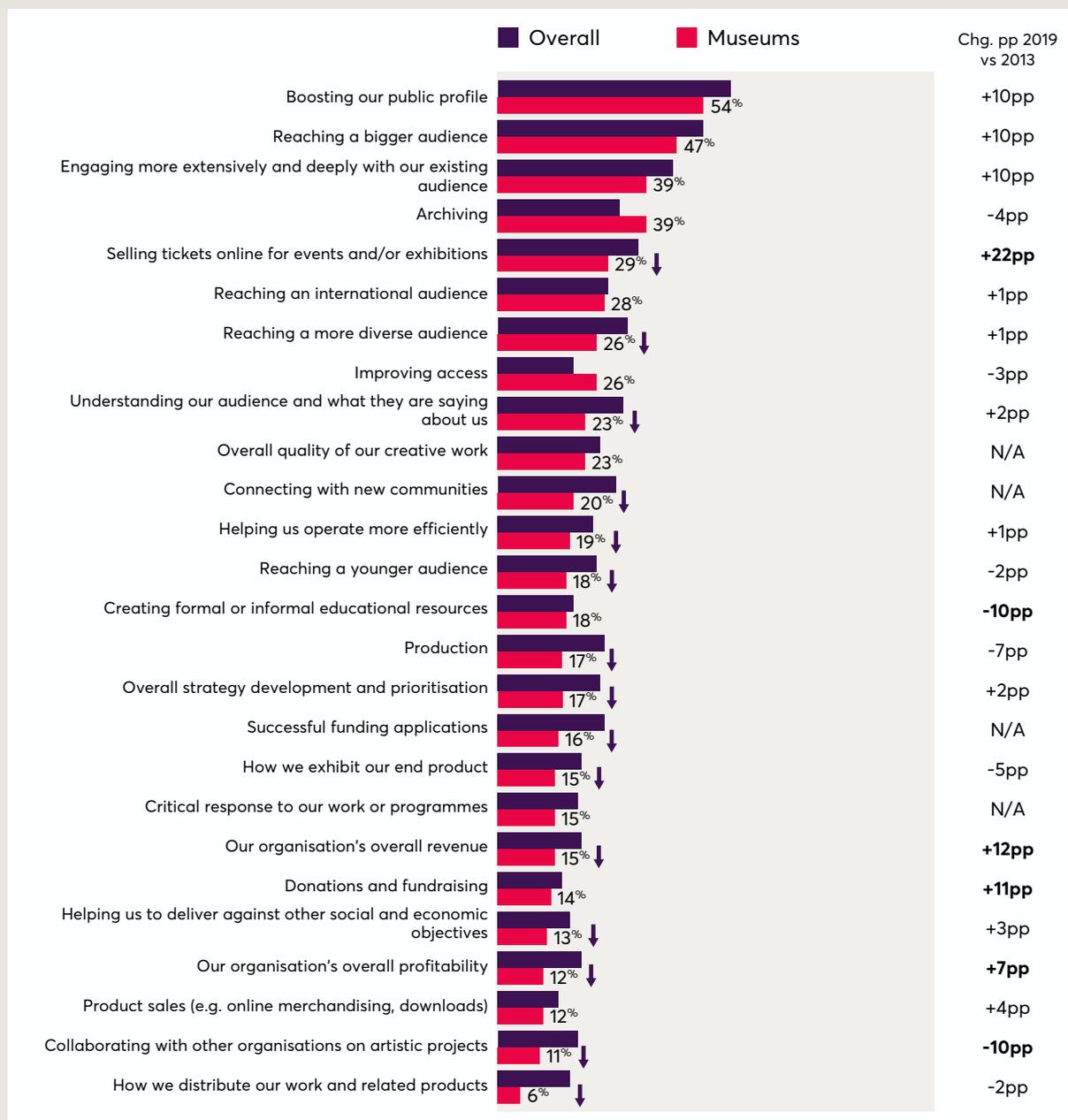
Proportion seeing major/fairly major positive impacts overall →	57 per cent (vs 67 per cent for the whole sector)
Main area of positive impact →	Boosting public profile

In the Digital Culture survey, organisations were asked how great an impact they felt digital technology had on their organisation's ability to fulfil its mission successfully. Overall, 57 per cent of Museums report a major/fairly major positive impact (scoring four or five on a five-point scale) from digital technology on their ability to carry out their mission, which is markedly lower than the sector average of 67 per cent.¹³ Since 2014 (the first time this question was asked), the proportion of museums reporting a major/fairly major positive impact from digital has declined, from 62 per cent.¹⁴

Across twenty-four of the twenty-six business areas tested in the survey, Museums report lower levels of major positive impact from digital technology, compared to the sector overall. The areas where Museums are significantly less likely than the sector overall to report major positive impact are helping us operate more efficiently (19 per cent of Museums report this vs 35 per cent for the sector overall), how we distribute or work and related products (6 per cent vs 19 per cent) and successful funding applications (16 per cent vs 28 per cent). Proportionately more Museums report major positive impact from digital compared to the overall sector in two areas: archiving (39 per cent of Museums vs 32 per cent of the sector) and improving access (26 per cent vs 20 per cent).¹⁵

Despite current low levels relative to the overall sector, Museums nevertheless report more major impact from digital across a number of business areas compared to 2013. The three areas showing the greatest increase since 2013 all relate to revenue generation: selling tickets online (7 per cent in 2013 vs 29 per cent in 2019), our organisation's overall revenue (3 per cent in 2013 vs 15 per cent in 2019) and donations and fundraising (3 per cent in 2013 vs 14 per cent in 2019). In other business areas the proportion of Museums reporting major positive impact has fallen over the same period, most notably in creating formal or informal educational resources (28 per cent of Museums reported this in 2013 vs 18 per cent in 2019) and collaborating with other organisations on exhibitions/artistic projects (21 per cent in 2013 vs 11 per cent in 2019).¹⁶

Figure 3: Proportion of Museums reporting a major positive impact of digital technology on business areas (Museums vs whole sector, 2019)



Thinking back over the past twelve months, would you say your organisation's use of the internet and digital technology has had a major positive impact, a minor positive impact, or no positive impact at all on each of the following? 'Chg. Pp' = Change in percentage points. Statistically significant changes 2013–2019 (at a 95 per cent confidence level) highlighted in bold. Arrows show statistically significant differences vs whole sector. N/A is stated where question was not asked in 2013.

Base: 2019 – all respondents (n = 997), 2019 – Museums (n = 164); 2013 – Museums (n = 118).

Management factors

Biggest barrier

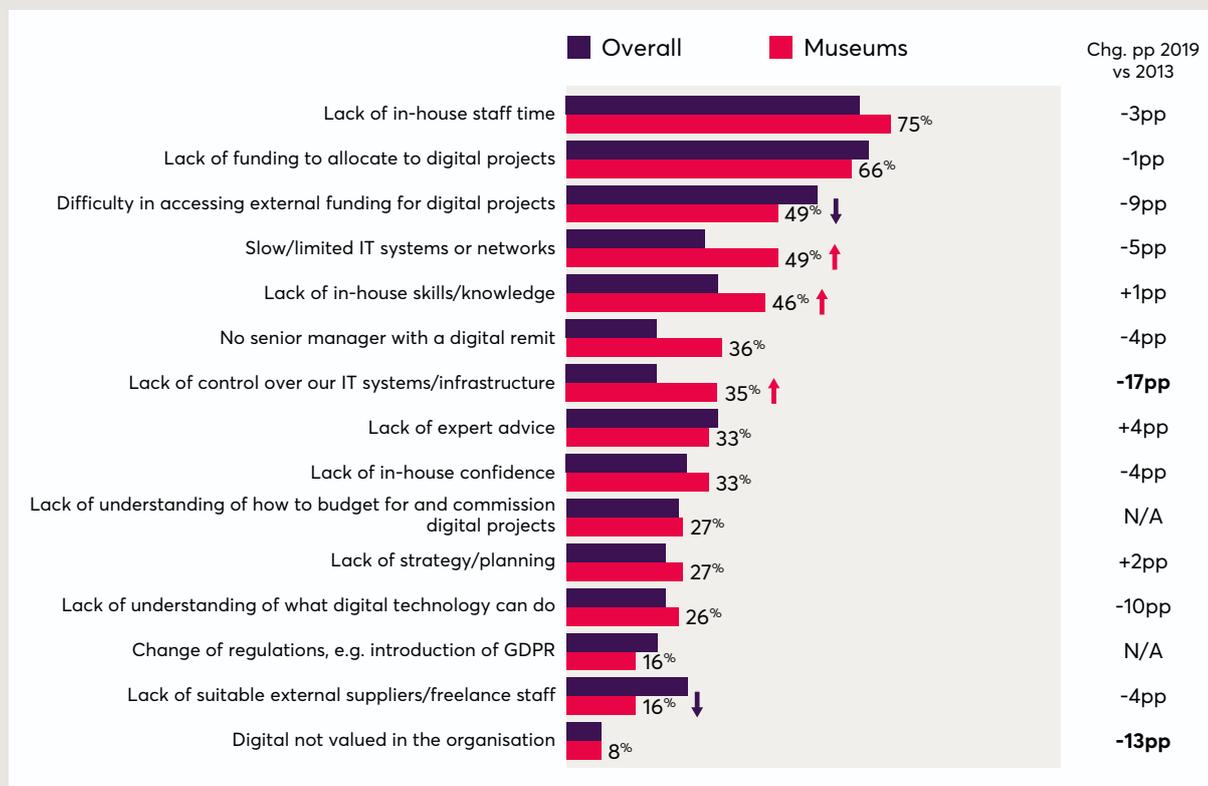


Lack of in-house staff time

With regard to the main barriers perceived to hinder the realisation of their digital aspirations, Museums are the one part of the sector where staff time is more likely than funding difficulties to be cited as a barrier: 75 per cent of Museums cite lack of in-house staff time as a barrier, versus 68 per cent of the sector overall. Funding is the next most prevalent barrier for Museums, 66 per cent of Museums report a lack of funding to allocate to digital projects (compared to 70 per cent amongst the sector overall) and 49 per cent of Museums perceive a difficulty in accessing external funding for digital projects (versus 58 per cent of the sector).¹⁷

Compared to 2013, ten of the barriers listed in the survey are less prevalent now amongst Museums. The largest declines in reported barriers are lack of control over our IT systems/ infrastructure (52 per cent in 2013 vs 35 per cent in 2019) and digital not valued in the organisation (21 per cent in 2013 vs 8 percent in 2019).¹⁸

Figure 4: Perceived barriers to achieving digital aspirations, felt by Museums (Museums vs whole sector, 2019)

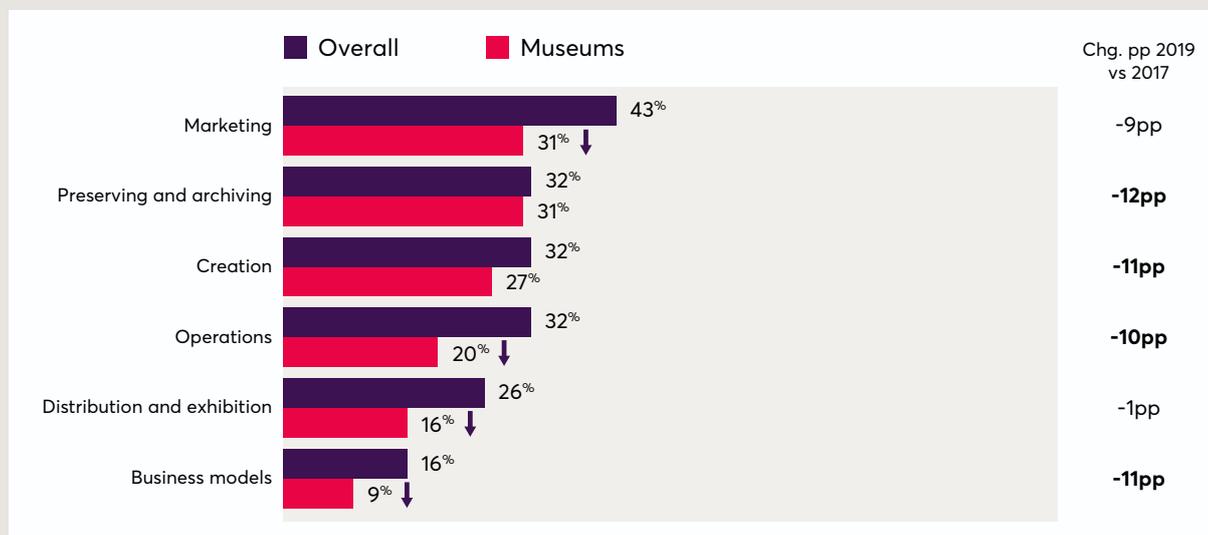


To what extent do you see each of the following as barriers to achieving your organisation's aspirations for digital technology? 'Chg. Pp' = Change in percentage points. Statistically significant changes 2013–2019 (at a 95 per cent confidence level) highlighted in bold. Arrows show statistically significant differences vs whole sector. N/A is stated where question was not asked in 2013.

Base: 2019 – all respondents (n = 976), 2019 – Museums (n = 159); 2013 – Museums (n = 118).

With regard to skill levels, compared to the sector overall fewer Museums report advanced skills across all six of the business areas tested (see Figure 5). Marketing and preserving and archiving are the two areas where Museums are most likely to claim advanced skills (31 per cent of Museums report advanced skills in both). However, Museums are significantly less likely than the sector overall to report advanced skills in marketing (31 per cent of Museums vs 43 per cent of the sector overall), operations (20 per cent vs 32 per cent), distribution and exhibition (16 per cent vs 26 per cent) and business models (9 per cent vs 16 per cent).¹⁹

Figure 5: Proportion of Museums that report their organisation to have advanced digital skills (six-ten out of ten) compared to their peers



For each of the following areas, how advanced do you feel your organisation's digital skill levels are compared to your peers? 'Chg. Pp' = Change in percentage points. Statistically significant changes 2013–2019 (at a 95 per cent confidence level) highlighted in bold. Arrows show statistically significant differences vs whole sector.

Base: 2019 – all organisations (n = 965), 2019 – Museums (n = 157); 2017 – Museums (n = 172).

Since 2013, the Digital Culture survey has also asked organisations to look at a list of skills and capabilities in eleven key digital technology areas, rating each one according to whether they feel well-served or under-served for their needs in this area. This takes account of external options as well as internal resources; feeling 'well-served' may involve having sufficient in-house skills or could be achieved through accessing skills or expertise externally.

Compared to the sector overall, fewer Museums say they are well-served for their needs in thirteen of the fourteen areas listed in the survey. The areas where there is most difference compared to the sector overall are multimedia/website design (34 per cent of Museums vs 51 per cent of the sector) and digital production (16 per cent vs 30 per cent). Unsurprisingly, the only area where more Museums report feeling well-served for their needs compared to the sector overall is digital archiving (54 per cent of Museums say this vs 43 per cent of the sector).²⁰

When comparing results since 2013, the proportion of Museums that feel well-served for their needs in digital technology has fallen across ten of the eleven business areas that have been listed in all five iterations of the survey. The most notable falls since 2013 have been for digital production (44 per cent of Museums felt well-served for their needs in 2013 compared to 16 per cent now), project management (35 per cent vs 18 per cent in 2019) and rights clearance (32 per cent vs 18 per cent).²¹

Endnotes

1. Please note, our sample size of Museums (n = 180), allows for a margin of error of +/- 7 per cent at a 95 per cent confidence level. Please see the main report for details of our calculations of statistical significance.
2. Q10. How important is digital technology to your organisation overall, at the present time, in each of the following areas? Base: 2019 – all organisations (n = 1,113), 2019 – Museums (n = 177).
3. Q10. Base: 2019 – all organisations (n = 1,113), 2019 – Museums (n = 177).
4. Q10. Base: Museums in the following years: 2013 (n = 118), 2019 (n = 177).
5. Q12: Now thinking about your organisation's digital activities, please indicate which of the following your organisation currently does. Base: 2019 – all respondents (n = 1,134), 2019 – Museums (n = 180).
6. Q12. Base: Museums in the following years: 2013 (n = 118), 2019 (n = 180).
7. Q23. Does your organisation currently have a web presence that is optimised for mobile devices? Base: 2019 – all organisations (n = 1,003), 2019 – Museums (n = 164).
8. Q23. Base: Museums in the following years: 2013 (n = 118), 2019 (n = 164).
9. Q18. On which, if any, of the following social networks/websites does your organisation currently have a regularly active profile? Base: 2019 – all respondents (n = 1,029), 2019 – Museums (n = 165).
10. Q18. Base: 2013 – all respondents (n = 891), 2017 – all respondents (n = 1,291), 2019 – all respondents (n = 1,029); 2013 – Museums (n = 118), 2017 – Museums (n = 188), 2019 – Museums (n = 165).
11. Q16. Thinking about how you use audience or visitor data (generated either via your own website, social media, offline engagement or a third-party platform such as Audience Finder), which of the following activities are you doing? Base: 2019 – all respondents (n = 1,036), 2019 – Museums (n = 167).
12. Q16. Base: Museums in the following years: 2013 (n = 117), 2019 (n = 167).
13. Q35. Overall, how great an impact do you feel digital technology has had on your organisation's ability to fulfil its mission effectively? Answer scale: five-point scale from no impact at all (1) to major impact (5). Base: 2019 – all respondents (n = 994), 2019 – Museums (n = 162).
14. Q35. Base: Museums in the following years: 2014 (n = 90), 2019 (n = 162).
15. Q28. Thinking back over the past twelve months, would you say your organisation's use of the internet and digital technology has had a major positive impact, a minor positive impact, or no positive impact at all on each of the following? Answer scale: three-point scale from no positive impact at all (1) to major positive impact (3). Base: 2019 – all respondents (n = 997), 2019 – Museums (n = 164).
16. Q28. Base: Museums in the following years: 2013 (n = 118); 2019 (n = 164).
17. Q37. To what extent do you see each of the following as barriers to achieving your organisation's aspirations for digital technology? Base: 2019 – all organisations (n = 976), 2019 – Museums (n = 159).
18. Q37. Base: 2019 – all organisations (n=976), 2019 – Museums (n=159).
19. Q67. For each of the following areas, how advanced do you feel your organisation's digital skill levels are compared to your peers? Base: 2019 – all respondents (n = 965), 2019 – Museums (n = 157).
20. Q45. Here is a list of skills and capabilities in key areas relating to digital technology and digital R&D. Please rate each one according to the extent to which your organisation is well-served or under-served for its needs in these areas. Base: 2019 – all organisations (n = 970), 2019 – Museums (n = 157).
21. Q45. Base: Museums in the following years: 2013 (n = 117), 2019 (n = 157).

Learn more about the Digital Culture 2019 survey findings

The Digital Culture 2019 report and factsheets are brought to you by Arts Council England and Nesta. Click [here](#) to read the Digital Culture 2019 report.



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