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# Digital Culture 2015

How arts and cultural  
organisations in England  
use technology

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December 2015

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Nesta...



Arts & Humanities  
Research Council



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## Participants

We would like to thank the 984 research participants that gave their time to complete the survey, without these people and organisations this study would not have been possible.

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Cover image: Dance Digital, Source: Dance Digital

The Digital R&D Fund for the Arts is a £7 million fund that has supported collaboration between arts organisations, technology providers, and researchers. The Digital R&D Fund is a partnership between Nesta, Arts Council England and the Arts and Humanities Research Council.

For information about its projects and to learn more about digital R&D visit the website for the Digital R&D Fund for the Arts at [artsdigitalrnd.org.uk](https://artsdigitalrnd.org.uk) or connect with us on Twitter @digitalrnd or using the hashtag #artsdigital



# Digital Culture

## 2015 How arts and cultural organisations in England use technology

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# 1 Foreword

**D***igital Culture* is a longitudinal survey of the uptake, usage and impact of digital technology in the arts and cultural sector commissioned jointly by Arts Council England, Nesta and the Arts and Humanities Research Council. It is self-evident that digital technology is rapidly changing creative industries, such as music and video games, in many ways. The impact on subsidised arts and culture is more hidden, though may actually be no less important. Drawing on the findings of this year's survey, this report uncovers how arts and cultural organisations have evolved their use of digital technologies over the three years the partners have been running the exercise.



Notwithstanding the better-than-expected settlement for arts and culture in the November 2015 Comprehensive Spending Review, the tight funding environment in England also places pressures on arts and cultural organisations to cost-effectively deliver on their artistic missions. This year's survey shows that large numbers of organisations continue to harness the opportunities of digital technology to reach audiences in new ways, create new works, become more efficient organisations and, in some cases, generate new revenue streams. The experience of these organisations is a valuable resource for the sector, and the *Digital Culture* study should be seen as a key plank of the wider effort, including the Digital R&D Fund for the Arts, to capture and share these experiences.

As in previous years, we have produced a number of outputs from the research, including **fact sheets** available by artform, exploring the results in relation to individual sub-sectors and the Arts Council England National Portfolio. These help to identify areas of interest at a more granular level than the main sample.

We also have a dedicated **online portal** providing easy access to all of the three year's data which I encourage you to explore. Organisations that have taken the survey across each of the three years can examine their results in relation to their peers. Alongside this, anyone can view the whole sample and break down the findings by organisational size, artform and location.

We are also excited about the potential that the panel dimension of the dataset holds – that is, for 589 organisations we have responses for two years or more. In the New Year we will publish the findings of our econometric analysis of the panel data.

We would like to thank all of the organisations that have given their time to participate in the research over the last three years – there have been over 2,800 responses in total which represent an enormous amount of effort. We hope the results are of use to them first and foremost.

**Hasan Bakhshi**  
Director, Creative Economy, Policy and Research,  
Nesta

## 2 Executive Summary

**D**igital technologies have disrupted established practices and created new opportunities for innovation across the arts and culture sector. However, in 2012, at the start of the *Digital Culture* research programme, there was little quantitative information tracking these developments and their impacts. Through this longitudinal study, Arts Council England (ACE), the Arts and Humanities Research Council (AHRC) and Nesta have attempted to fill this gap by benchmarking and understanding the role of digital technology for arts and cultural organisations.

In each of the past three years, around 900 organisations have completed a detailed survey asking about the importance of digital technologies, the activities they were undertaking, the impact, and management factors such as barriers, skills and resources. This report discusses the major changes that the sector has experienced over the last three years and can be read in conjunction with an online data portal and a series of eight factsheets that go into further detail on different parts of the sector.

For the third year running it is clear that digital technology plays a crucial role for many organisations. 90 per cent now regard digital as important for marketing, 80 per cent as important for preserving and archiving, and 74 per cent for operations. Activities in these areas are well-established and continue to deliver valuable impacts, and overall almost three-quarters (72 per cent) of organisations report a major positive impact from digital technology on their ability to deliver their mission. Social media has become firmly entrenched with image-sharing platforms such as Instagram, showing rapid growth, and mobile-readiness has improved since 2013 with 59 per cent now operating a mobile-optimised web presence.

Digital technologies have also become more important for revenue generation, with 45 per cent of organisations now reporting that this is important to their business models, up from 34 per cent in 2013. For example 41 per cent now accept online donations (up from 35 per cent in 2013) and 16 per cent report a major positive impact on revenue (11 per cent in 2013). Notwithstanding a tendency to overestimate their ability to introduce new digital activities this year, arts and cultural organisations remain keen to try new things. Over three-quarters (78 per cent) plan on introducing something new next year, with crowdfunding being the most anticipated activity.

However 2015 data shows small but statistically significant declines across a range of different measures and business areas, more than offsetting the increases we saw in 2014:

- The proportion seeing digital technologies as important to creation and distribution has fallen since 2013, now standing at 52 per cent for distribution (62 per cent in 2013) and 54 per cent for creation (64 per cent in 2013). However, the proportion seeing marketing, preserving and archiving as important has remained almost exactly the same over this period (90 per cent for marketing in 2015 and 80 per cent for preserving and archiving in 2015).
- Six different activities are now significantly less widespread than they were, with only two significantly increasing since 2013. For instance, 12 per cent of organisations are now livestreaming (compared with 15 per cent in 2013) and 72 per cent are now publishing content onto their websites (77 per cent in 2013). However, paid search and/or online display has increased to 21 per cent (14 per cent in 2013).



- Take-up of data-led activities has also stalled or fallen back, for example 43 per cent now use data to develop their online strategy, down from 47 per cent in 2013.
- In six different areas, fewer organisations report that digital technology is having a major positive impact in 2015 relative to 2013. For instance, 42 per cent now perceive a major positive impact on engaging with their audience (47 per cent in 2013) and 21 per cent on how they exhibit their end product (27 per cent in 2013).

These changes are being felt in different ways across the sector:

- Heritage (which includes museums) and theatre organisations remain less active and report less impact than others: 60 per cent of heritage and 63 per cent of theatre organisations report a major positive overall impact from digital technology (compared with a sector average of 72 per cent). Heritage organisations have, in particular, scaled back educational activities, only 40 per cent are now producing content for schools, down from 65 per cent in 2013.
- Organisations outside London remain significantly less likely to be digitally active in a variety of areas. For instance, outside London around 41-44 per cent (depending on area) of organisations sell tickets online, compared with 54 per cent of London organisations. When looking at impacts, organisations in the North of England report almost the same degree of positive impact as London, but the Midlands and South report less positive impact.
- National Portfolio Organisations (NPOs) are more digitally active, experience fewer barriers, have better access to skills, are more likely to be engaged in R&D activities, and are more likely to report positive impacts. There is also evidence that the gap between NPOs and the others is widening. Whilst the overall proportion of organisations that report a major positive impact from digital technology has remained unchanged at 72 per cent since 2013, for NPOs it has increased: 81 per cent now perceive a major positive impact compared with 74 per cent in 2013.

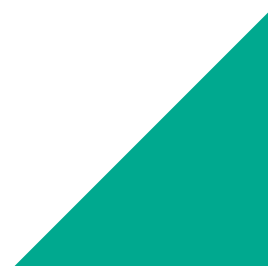
The qualitative responses suggest that there are a number of factors which explain these results.

First, more organisations have highlighted concerns around access to finance, with 73 per cent of organisations now seeing lack of funding for digital as a barrier to their aspirations (up from 68 per cent in 2013).

Second, there is evidence that some organisations are in ‘test and learn’ mode, trying things out and then deciding not to continue if they do not deliver enough benefit to justify the cost. Crowdfunding and livestreaming, for example, have sometimes been more difficult and resource-intensive than expected.

Finally, respondents report a number of organisation-related factors which might inhibit use of digital technologies. More report there being no senior digital manager in their organisation, IT systems being slow/limited and there being a lack of suitable external suppliers. The same trend is clear with digital skills, where organisations feel less well-served across 12 out of 13 areas tested in comparison to 2013 (with only digital marketing remaining stable), although the changes are only significant for four areas: website design, digital production, digital commissioning and rights clearance. Furthermore, significantly fewer organisations (especially smaller ones) report that they exhibit the R&D behaviours that the survey suggests correlated with digital success, such as experimenting and taking risks, and evaluating the impact of digital work.<sup>1</sup>

Over the past three years, *Digital Culture* has tracked the different ways that organisations across art and cultural forms are engaging with digital technologies. It has shown that the benefits of technology have been widely felt. This year’s research results, however, suggest that the pace of change has slowed in some areas and the impact of digital technology has been less evident.



## 3 Introduction

**D**igital technology has changed the way that we engage with arts and culture, as with many other areas of life. From viewing online collections for museums to buying tickets to the theatre via mobile phones, audiences now tap into the work of these institutions digitally on a daily basis. However, at the start of the *Digital Culture* research programme in 2012, little was known in quantitative terms about the strategic and operational use of digital technology by arts and cultural organisations.

*Digital Culture* is a longitudinal survey, which explores how arts and cultural organisations in England use technology and its impact on performance. In 2013, 891 organisations completed an online survey and a report was published in November 2013.<sup>2</sup> In 2014, 947 organisations responded, and a set of reports was published in December 2014.<sup>3</sup> This year, the response has edged up further, with a total of 984 organisations completing the survey, as shown in Figure 1. This third year of survey findings allows us to reflect on how much the sector has changed since 2013.

**Figure 1:** Digital Culture respondents, 2013-15

	2013	2014	2015
<b>Total responses</b>	891	947	984
<b>o/w NPOs/MPMs<sup>4</sup></b>	407	455	392 <sup>5</sup>

Building on the base-line results from 2013, last year's study painted a picture of a sector focused on consolidating its use of digital technology, rather than rapidly adopting new digital activities. The biggest growth was seen in areas related to revenue generation and business models – 51 per cent of organisations reported that digital was important or essential to this part of their activity, compared with 34 per cent the year before. There was also evidence that organisations were using digital technology in increasingly sophisticated ways, such as growth in the use of data to assist with fundraising and a higher proportion of organisations having a mobile-optimised web presence.

Whilst 2014 did not see much growth in specific digital activities, when asked about the impact of digital technology, significantly higher numbers of organisations reported major positive impacts in areas related to finances and audience development. The implication was that for many organisations, digital was becoming more effective – and this was reported similarly by small organisations as well as large.<sup>6</sup>

Finally, last year's study depicted a sector that was keen to try new things – 75 per cent reported that they intended to introduce at least one new activity in the next 12 months, and the most anticipated activity was crowdfunding, which 21 per cent of organisations planned to try. This was in spite of persistent barriers impeding digital aspirations – none of the barriers surveyed in the study, such as lack of time and funding, had reduced significantly from 2013 to 2014.

This year, the survey data was collected in June to October 2015, and the sample frame was the same as the previous two years – arts and cultural organisations in England in a database collated by the funders.<sup>7</sup> Respondents were balanced across ACE art and cultural forms and areas, and the sample was weighted to be nationally representative. As a rule, the questions were identical to the 2013 survey questions to allow us to track progress on key metrics, though additional answer categories were added to some questions in order to keep the survey up-to-date with new technologies and trends.<sup>8</sup>

A longitudinal study allows us to follow the journey of individual organisations over time, and analyse the factors which contribute to their trajectory. A total of 239 organisations completed the survey in all three years and we are grateful for their commitment to the study; a further 350 organisations completed the survey in two of the three years (constituting a panel data set). Their individual responses have been analysed and all of the findings from the wider sample of respondents reported here are consistent with the responses of this smaller group.<sup>9</sup> In the New Year, Nesta will publish an econometric analysis of the panel data set.

The survey is structured around three key topics – the perceived importance of digital technologies to arts and cultural organisations, the specific digital activities they are undertaking, and the impact of digital technologies on different areas of their business. As last year, in this report we examine how the use of technology has changed, focusing on the biggest shifts since 2013, and putting the changes observed last year in context. Alongside this main report are eight fact sheets, which highlight key findings for the seven main art and cultural forms included in the study – visual arts, theatre, music, literature, dance, combined arts and museums – and one for NPOs as a separate group. Data from all three years of the study can also be explored through a specially **designed portal**, which allows the sample to be filtered by artform, region and size.

The remainder of this report is split into two main sections. First, we discuss the activities that organisations are undertaking – how has the importance of digital technology changed? Which areas are growing and declining? What is preventing organisations from doing more? And second, we move on to the changing impact of digital technology – how is the impact of digital being felt in different parts of the sector? What distinguishes those that are benefitting most from digital technology?



Soundlab Digital R&D Fund for the Arts event, Source: Heart n Soul



## 4 What are arts and cultural organisations doing with technology?

### 4.1 The importance of digital technology to arts and cultural organisations

In 2015 we have seen some retrenchment, as digital technology has become seemingly less important to certain aspects of arts and cultural organisations' work, and some organisations have cut back on their levels of digital activity. Figure 2 shows the perceived importance of digital technology across different business areas; statistically significant changes between 2013 and 2015 are marked with arrows. Marketing and preserving have not shown significant change over the three years, whilst operations has only shown a very small (but statistically significant) change. These can be seen as areas where, for most organisations, digital technology is no longer discretionary – it is woven into their core business. The Writing Squad, for example, say they would not be able to operate effectively without digital technology as a fundamental communications tool:

*It is just the way we speak to each other as a community of writers in a development and creative programme dispersed all over the north, throughout the UK and abroad – but also it is how we spread the word out to a small but distinct audience of young writers and those interested in young writers.*

The Writing Squad [writer mentoring and workshops]

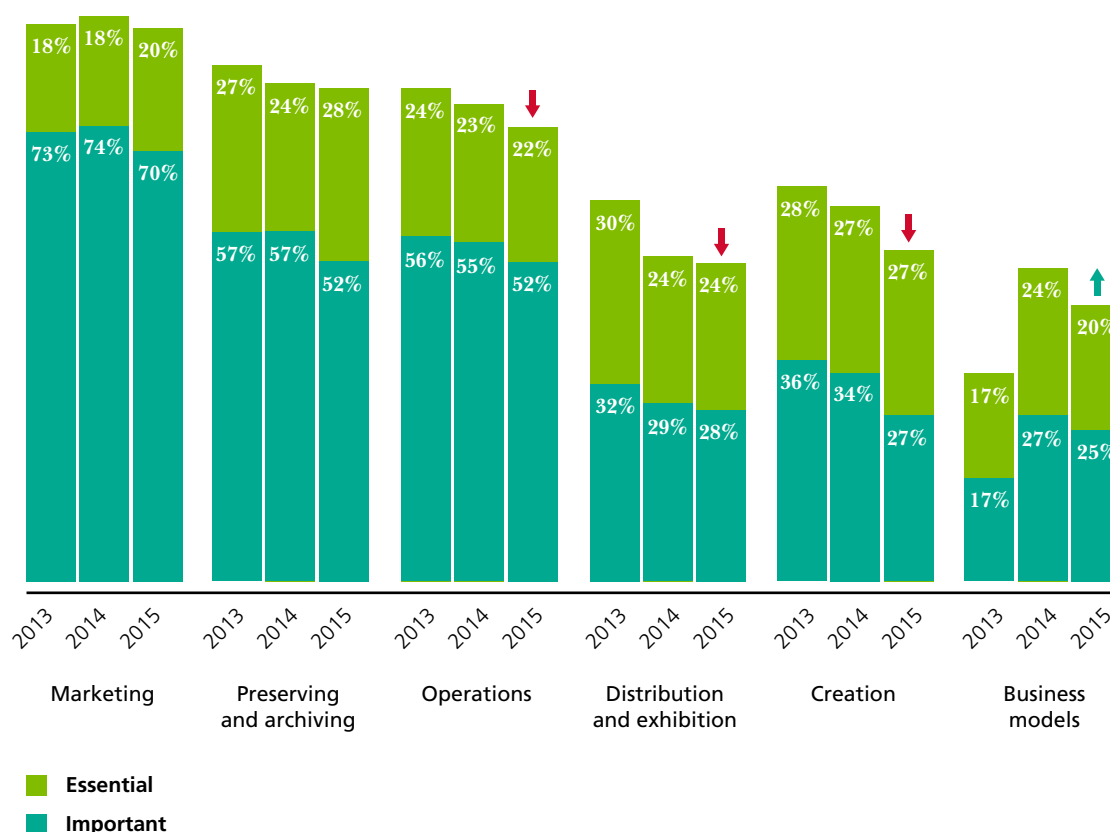
Some organisations, particularly larger ones such as the Royal Shakespeare Company, also report that digital has become vital to their distribution activities:

*Extending reach through our Live From Stratford-upon-Avon cinema broadcasts and our free Schools' Broadcasts ... has been game-changing in terms of our offer to young people and teachers and for our international reach.*

Royal Shakespeare Company [major theatre company]

However, for many others, digital technology for distribution and creation has become less important since 2013, for example whereas in 2013, 64 per cent of organisations saw digital as important or essential to their creative output, in 2015 this dropped to 54 per cent (with only half of those considering it essential).

**Figure 2: The importance of digital technology to different business areas, 2013-15**  
(significant changes marked with arrows)



How important is digital technology to your organisation overall, at the present time, in each of the following areas? (Arrows indicate statistically significant differences at the 95 per cent confidence level)

Base: 2013 – all respondents (n = 891); 2014 – all respondents (n = 941); 2015 – all respondents (n = 982)

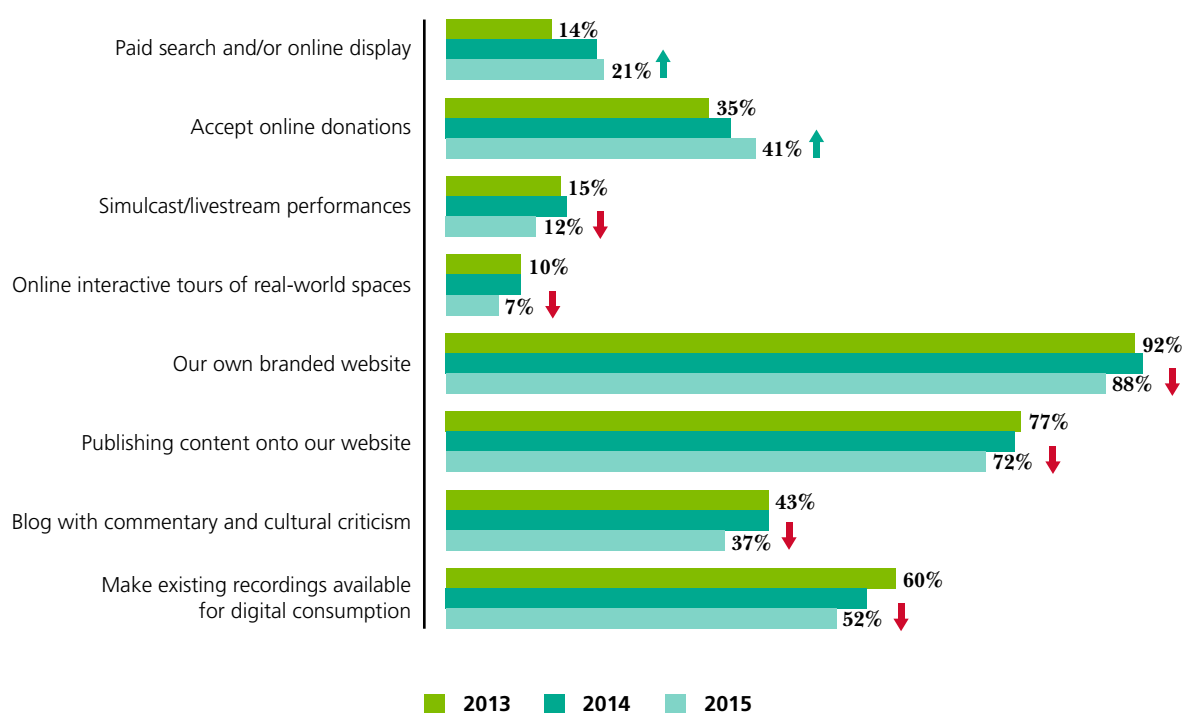
These changes have affected different parts of the sector at different rates. Most notably, the falls in the importance of digital technology to distribution and creation have both been particularly felt by theatre and literature organisations. In 2013, 57 per cent of theatre organisations saw digital technology as important to creation, but in 2015 this has fallen to 45 per cent; similarly while 81 per cent of literature organisations perceived digital to be important to distribution in 2013, this has now dropped to 61 per cent.<sup>10</sup>

The one area that has seen a significant net increase in importance is business models and the use of digital technologies to generate new revenue streams, increasing from 34 per cent of organisations in 2013 to 45 per cent in 2015. Some parts of the sector, however, have not experienced that change. For Combined Arts and for Heritage (which includes museums), the importance of digital technology for business models remains at 2013 levels – for example, 34 per cent of Heritage organisations see digital as important to business models in 2015, compared with 33 per cent in 2013.<sup>11</sup> On the other hand, large organisations remain more focused on this area than average – 61 per cent of large organisations see digital technology as important for business models (up from 42 per cent in 2013), compared with 36 per cent of small organisations (up from 29 per cent in 2013).<sup>12</sup> NPOs also report a higher than average level of importance for business models (66 per cent compared with 41 per cent in 2013).<sup>13</sup> This suggests that organisations that are larger and/or have more secure funding have been more able to adapt their business model to exploit digital technologies – echoing other findings in this year's survey.

## 4.2 Digital activities

Between 2013 and 2015, activity levels decreased significantly for six out of the 22 areas surveyed (nine more areas show decreases that are not statistically significant), and increased in just two: paid search and/or online display and accepting online donations. Unsurprisingly, the activities that have become less widespread mirror the areas in which the perceived importance of digital has declined – for example, distribution activities such as live streaming and online tours. Three of the declines relate to the nature of organisations' web presences: running a website, posting content onto a website and blogging. This may arguably reflect a shift in emphasis by some organisations towards social media, one of the few areas to see slight increases since 2013. This is discussed in more detail in the next section.

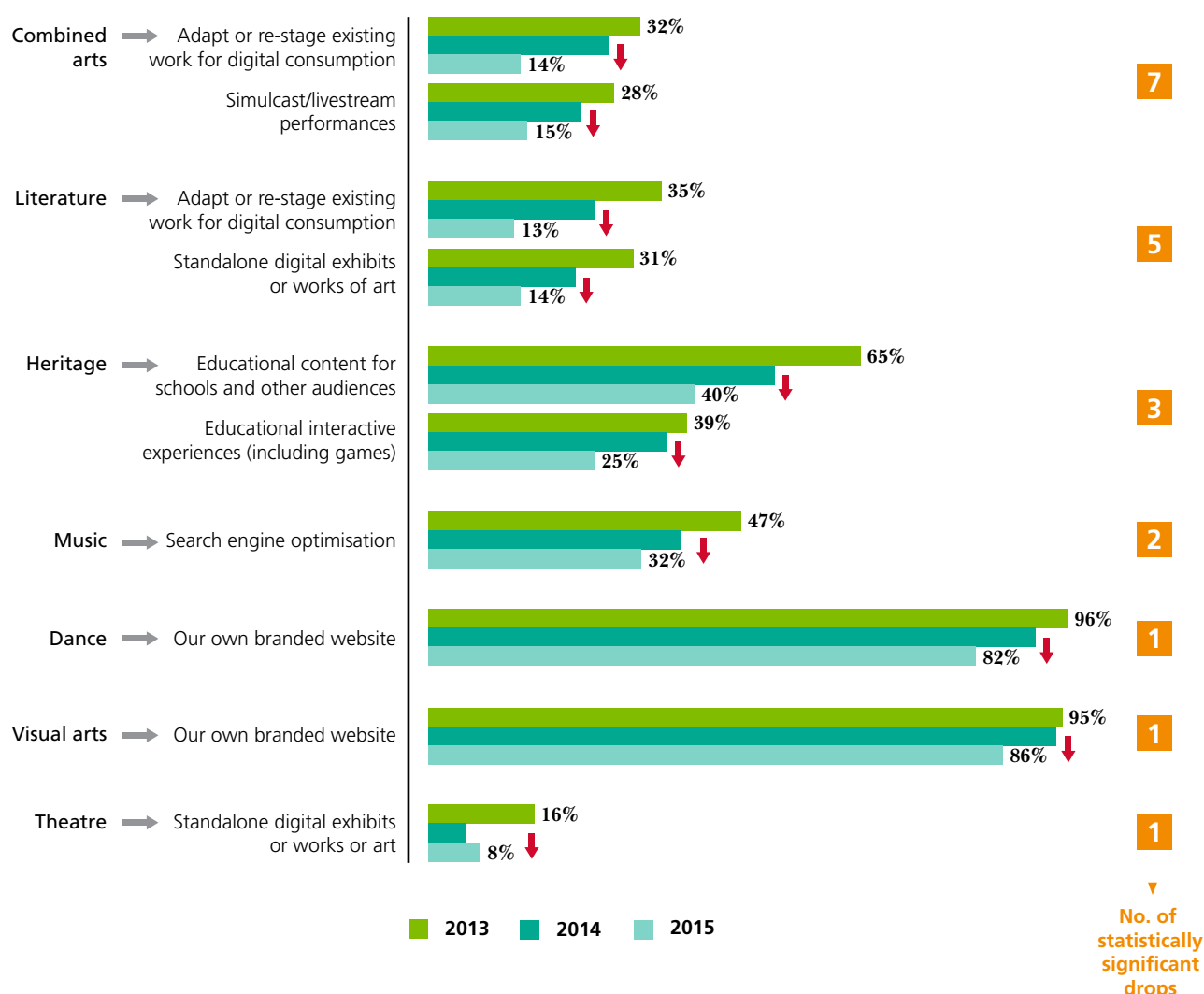
**Figure 3: Digital activities that show a statistically significant change in the proportion of organisations engaging, 2013-2015 (ranked by size of change, increases shown first)**



Now thinking about your organisation's digital activities, please indicate which of the following your organisation currently does (Arrows indicate statistically significant differences at the 95 per cent confidence level)

Base: 2013 – all respondents (n = 891); 2014 – all respondents (n = 947); 2015 – all respondents (n = 984)

The nature and scale of these declines varies across different art and cultural forms – Figure 4 shows examples of the most significant decreases. Combined Arts organisations, which last year were doing the highest number of different activities on average, have seen significant decreases in seven areas. Literature organisations, too, have seen notable declines, with significant decreases in five areas.<sup>14</sup> For more detail on these two groups please see the accompanying factsheets.

**Figure 4: Examples by artform of large decreases in proportion of organisations engaging in digital activities**

Now thinking about your organisation's digital activities, please indicate which of the following your organisation currently does. (Arrows indicate statistically significant differences at the 95 per cent confidence level)

Base: 2013 – combined arts (n=99), literature (n=54), heritage (n=106), music (n=121), dance (n=53), visual arts (n=152), theatre (n=221); 2014 – combined arts (n=132), literature (n=58), heritage (n=87), music (n=133), dance (n=49), visual arts (n=145), theatre (n=249); 2015 – combined arts (n=104), literature (n=64), heritage (n=120), music (n=162), dance (n=62), visual arts (n=139), theatre (n=207)

We have also seen a decrease in the number of new activities being introduced each year for certain types of organisations. At an aggregate level, the change is not significant (three new activities on average in 2013 compared to 2.7 in 2015), but some art and cultural forms have seen much bigger drops in the number of new activities being introduced. Theatre organisations, for example, introduced an average of 2.6 new activities in 2013, this fell to 1.9 in 2015.<sup>15</sup> Overall, a significantly greater number of organisations are not introducing new activities – 31 per cent introduced nothing new in the last year, up from 25 per cent in 2013.

Several organisations describe focusing their efforts on updating old websites or upgrading other technology, such as booking systems, rather than introducing altogether new digital activities. For example:

*Our website, which is part of a major investment programme for 2015, is clearly not doing justice to the scale and reach of our work. It has, for many years, fallen short of our expectations as a tool for engaging with existing and new audiences and showcasing our production credentials. As a strategic priority we have earmarked a major investment in a new website as part of a broader digital communications strategy.*

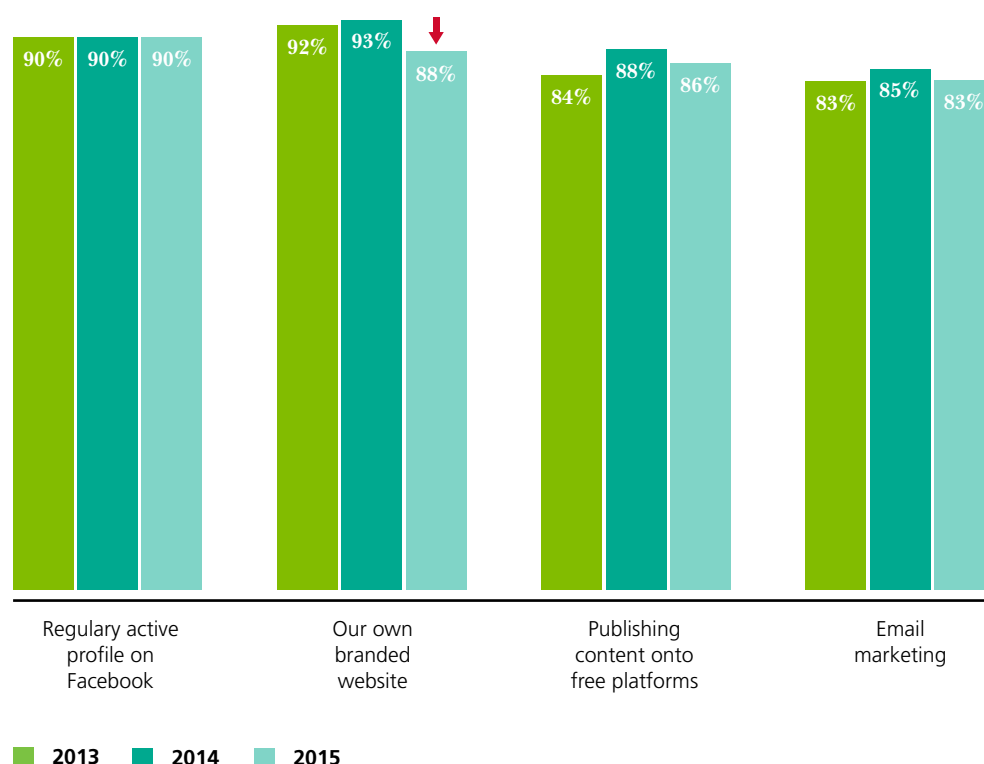
Walk the Plank [outdoor arts installations and performances]

*We moved to a new booking system which works very well except in terms of online booking. This relates to a lack of resources to integrate into our website, which is not fit for purpose. We need to build the 'front window' for the technologies we invest time and money in by developing a new website.*

The Garage [performing arts venue in Norwich]

Finally, some activities that we might reasonably have expected to see approaching near ubiquity for arts and cultural organisations at the outset of the study, have not seen any significant increases over the three years – running a website has fallen slightly to 88 per cent, presence on Facebook remains at 90 per cent, publishing content onto free platforms at 86 per cent, and email marketing at 83 per cent. There will be a small number of organisations that have chosen not to do these things, or for whom these activities are not relevant, but the absence of any growth in these areas is equally consistent with there being a small number of organisations for whom even simple digital activities are still out of reach.<sup>16</sup>

**Figure 5: Take-up of digital activities which are closest to ubiquitous, 2013-2015**



On which, if any, of the following social networks/websites does your organisation have a regularly active profile? (Arrows indicate statistically significant differences at the 95 per cent confidence level)

Now thinking about your organisation's digital activities, please indicate which of the following your organisation currently does

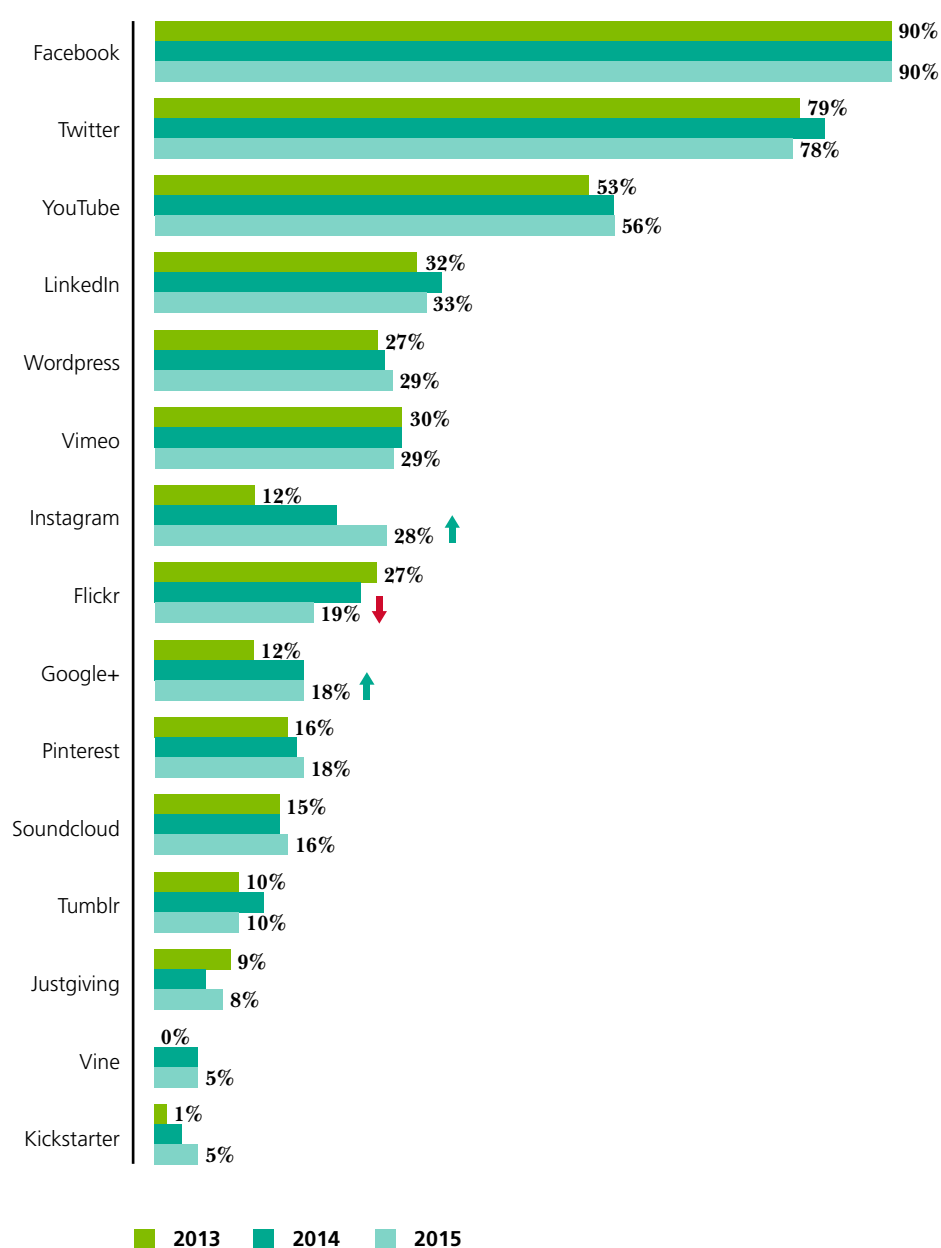
Base: 2013 – all respondents (n = 891); 2014 – all respondents (n = 947); 2015 – all respondents (n = 984)



## 4.3 Social media

Across the three years, the percentage of arts and cultural organisations making use of most social media platforms has been stable. Use of Twitter, for example, rose last year from 79 per cent to 82 per cent and then this year has fallen back to 78 per cent, whilst use of Facebook has stayed static at 90 per cent of organisations. The most significant has been a movement in photo-sharing away from Flickr and onto Instagram, which has grown from 12 per cent of organisations in 2013 to 28 per cent in 2015.<sup>17</sup> There has also been an increase in use of Kickstarter, from 1 per cent in 2013 to 5 per cent in 2015 (we will return to crowdfunding later).

**Figure 6: Take-up of top social media platforms, 2013-2015**



On which, if any, of the following social networks/websites does your organisation have a regularly active profile? (Arrows indicate statistically significant differences at the 95 per cent confidence level)

Base: 2013 – all respondents (n = 891); 2014 – all respondents (n = 944); 2015 – all respondents (n = 982)



Production shot, Source: Coney

The survey also tracks a number of more sophisticated social media behaviours, such as social media listening and using social media to collect user-generated content for artistic purposes. The only area showing a statistically significant increase is investing money in social media campaigns or advertising to promote content – 21 per cent of organisations now do this, compared with 18 per cent last year.<sup>18</sup> This is in line with broader trends on Facebook, where there have been reports that organic reach for posts (the number of Facebook users a post can reach without any paid promotion) has declined steadily over the last few years and Page owners have had to invest in Facebook ads to reach audiences reliably.<sup>19</sup>

Social media divides opinion amongst respondents in terms of its effectiveness. On the one hand, some organisations report that social is now a vital, cost-effective way to promote their work:

*Social media has allowed us to publicise and market our events at a tiny fraction of the cost we would have incurred using traditional marketing strategies 15 years ago. It also helps us to monitor public perception of our work, which feeds into our curatorial direction. Finally it provides a means to converse and communicate directly with the public, particularly useful in the event of programme changes.*

Sound Four [London contemporary music festival organiser]

On the other hand, several organisations report disappointment with the results they see from social media use, particularly in terms of conversion from activity into revenue or ticket sales:

*Facebook and Twitter consistently fail to sell more tickets than anticipated, despite good engagement through the year and over 13,000 followers/likes.*

Bath Film Festival

*Digital marketing is often hard as most people are overloaded with email and social media content. This content is now very undervalued. Most marketing which leads to bookings or audience development is more effective through other more personal mediums.*

Handmade Theatre [theatre company]

*For our 2014 campaign, boosting posts on Facebook did not show any direct relation to increased ticket sales. This could be as a result of the very short lead times between boosting the postings and the occurrence of the event.*

Afrika Eye [film festival]

Others argue that they are unlikely to see good results from social media (and digital more generally) due, in particular, to the make-up of their audience:

*Our target audience is predominantly from the older generation and a significant proportion still struggle to consume basic email marketing messages, let alone website/social media delivered content.*

An arts membership organisation

Finally, some organisations acknowledge that their lack of success on social media may be at least in part down to a deficit in skills and experience, preventing them from getting the most out of the medium:

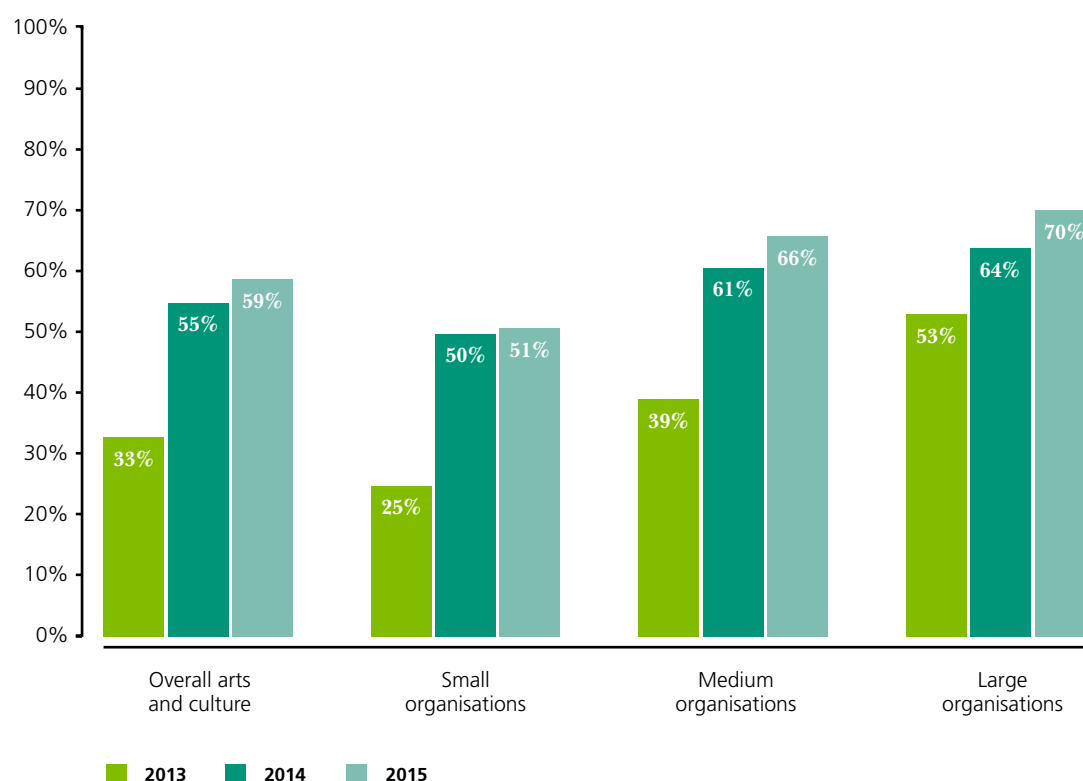
*On reflection, any negatives have more to do with us lacking knowledge on how to get the best from social media advertising services. Specifically, a Facebook and Twitter campaign was not as effective as we'd hoped but this encouraged us to develop our understanding and now we feel more able to set an effective campaign up.*

The London Group [artists collective]

## 4.4 Mobile and use of data

In last year's report we observed growth in the mobile-optimised digital presence of arts and cultural organisations, and the use of digital data in different business processes. This year, growth in these areas plateaued for the majority of organisations.

In 2013, 33 per cent of organisations had a mobile-optimised web presence (either a mobile-specific site, an adaptive/responsive website, or an app), and this rose to 55 per cent in 2014.<sup>20</sup> This year, we have seen continued movement upwards (although the change from 2014 is not statistically significant), with 59 per cent of all organisations (and 70 per cent of the larger ones) now mobile-ready. While welcome, the evidence is that this compares poorly with consumer brands, where 88 per cent are estimated to have a mobile-optimised presence.<sup>21</sup> The implication is that the arts and culture sector risks falling behind the wider internet economy, not least since Google now explicitly ranks mobile-friendly sites first in mobile search results.

**Figure 7: Proportion of organisations with a mobile-optimised web presence, 2013-2015**

Does your organisation currently have a web presence that is optimised for mobile devices?

Base: 2013 – all respondents (n = 887), small organisations (n = 300), medium organisations (n = 288), large organisations (n = 245), 2014 – all respondents (n = 944), small organisations (n = 299), medium organisations (n = 304), large organisations (n = 276), 2015 – all respondents (n = 983), small organisations (n = 349), medium organisations (n = 291), large organisations (n = 267)

There are many reasons why cultural institutions may be slower than commercial organisations in adapting to mobile, including the relatively high fixed costs of doing so, and a difficulty in accessing relevant skills. This may be particularly the case for building bespoke apps: in the survey, several organisations reported that they had tried to produce apps, but that they had proven to be more complex and costly to produce than they had imagined they would be:

*As part of our Strategic Touring project the first tour was due to have an app developed to accompany the tour. Due to technical difficulties (which could have been overcome, but at a cost which would challenge the cost/benefit) we reluctantly decided to abandon this element of the project. Being unable to realise the app was a disappointment.*

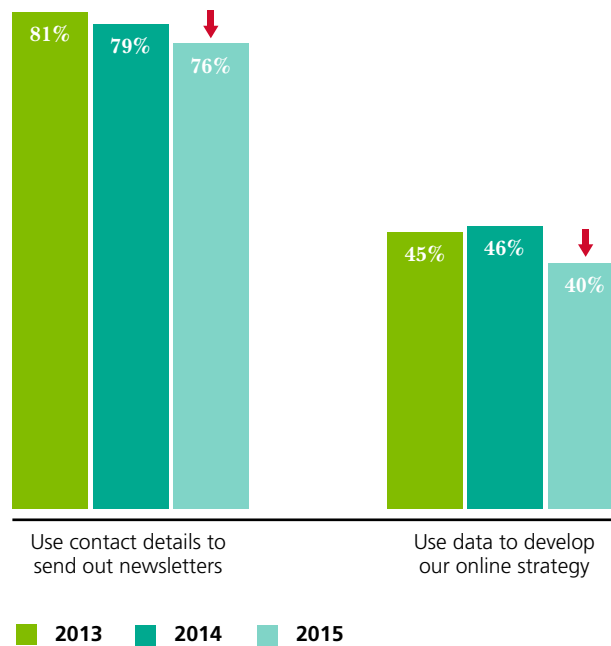
Dance East [dance development agency and performance venue]

*App development projects are frustrating because they often require too much financial investment and reliance on tech expertise (that can be hard to source) and not responsive enough to user feedback.*

Knowle West Media Centre [Bristol arts charity]

The study has also tracked a range of data-led activities, such as using data to identify high net worth potential donors for fundraising purposes, and to inform commissioning strategy. Across the three years, there has been little net change, and in fact this year there have been modest but significant drops in two areas – the proportion of organisations using audience data to send out newsletters has dropped from 81 per cent in 2013 to 76 per cent in 2015, and only 40 per cent now use data to develop their online strategy, compared with 45 per cent in 2013. These drops are fairly consistent across organisation sizes and art and cultural forms.<sup>22</sup>

**Figure 8: Data-led activities showing significant change since 2013**



Thinking about how you use audience or visitor data (generated either through your own website, social media or through offline engagement), which of the following activities do you do? (Arrows indicate statistically significant differences at the 95 per cent confidence level)

Base: 2013 – all respondents (n = 879); 2014 – all respondents (n = 935); 2015 – all respondents (n = 979)

Organisations are seemingly being held back in what they can do with data by a number of different factors, for example:

- Legacy systems often need extensive upgrading before the real benefits of audience data can be felt, and these changes can take a lot of time and investment:

*We are about to go live on a new website which will interact with mobile phones and will enable us to track data much better. Our previous website, designed and run in-house, was poor in its ability to deliver data. We will also shortly have the facility to sell online. These all represent shortcomings until now.*

**Bloodaxe Books** [publishing house specialising in poetry]

- Some organisations have limited access to data due to the nature of the work they do, such as touring theatre groups:

*As a touring company, it is hard for us to obtain accurate data about our audience as we have little or no access to the audience data from the venues we visit.*

**Headlong Theatre** [touring theatre company]



## 4.5 Barriers to realising digital aspiration

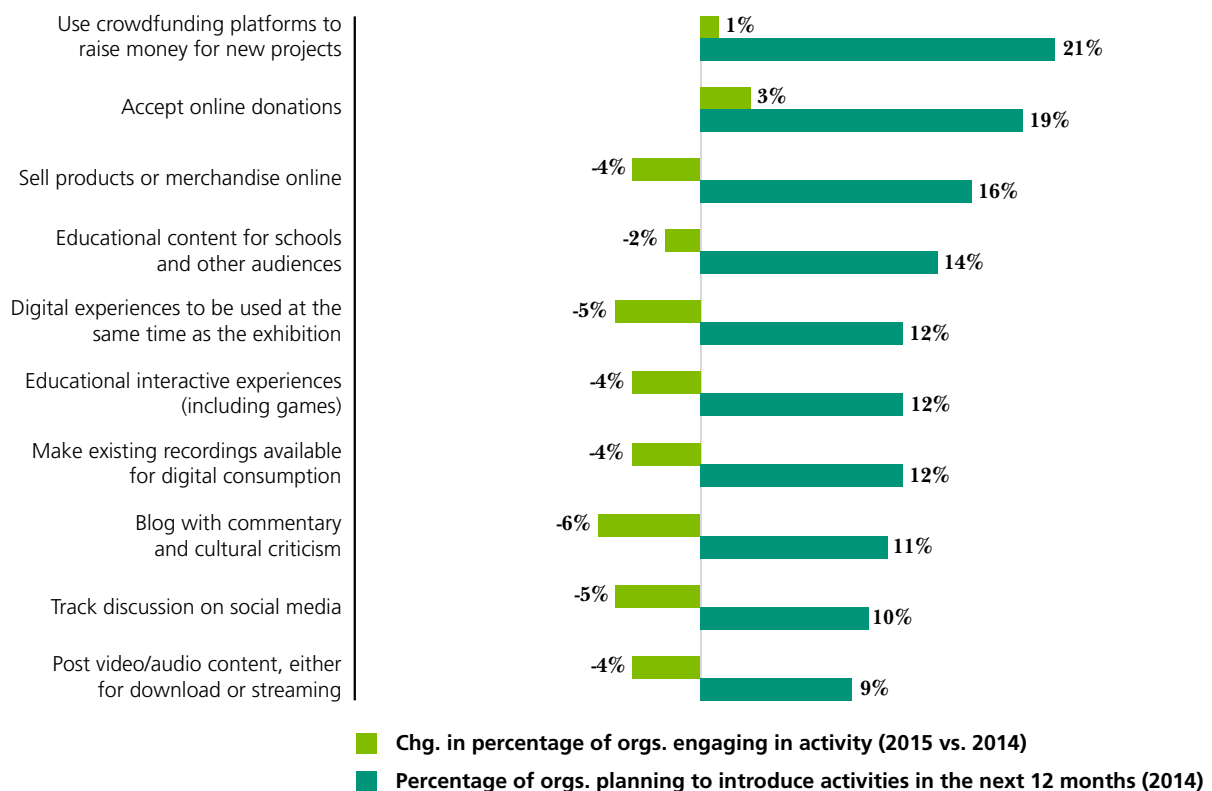
As discussed above, this year's survey has shown decreases in many digital activities, and, relative to 2013, significant increases in only two areas. Contrast this with the proportion of organisations that told us last year that they were planning to introduce new digital activities: for example, 21 per cent of organisations told us last year that they had planned to start using crowdfunding platforms in 2015 – in the event, the number of organisations using crowdfunding stayed almost exactly the same (Figure 9).<sup>23</sup> Whilst this may be partly due to organisations introducing crowdfunding in 2014 and then not choosing to do it again, it is undoubtedly also the case that, for some organisations, crowdfunding turned out to be more difficult than they had anticipated, for example:

*We have just started experimenting with crowdfunding and although the campaign was effective, we found it slower and harder to achieve the set fundraising target than we expected.*

People's History Museum [museum in Manchester]

This difference between expected and actual growth is consistent across organisations of all sizes and types, with a few variations. NPOs, for example, showed in general less of a tendency towards over-optimism, crowdfunding being the big exception: in 2014, 25 per cent of NPOs had said they would introduce crowdfunding in 2015, when in actual fact the percentage was just 2 per cent.<sup>24</sup>

Figure 9: Top 10 digital activities by expected annual growth (2014 survey), compared with actual change (2014-15)



Now thinking about your organisation's digital activities, please indicate which of the following your organisation currently does

Which, if any, of the following activities is your organisation actively planning to introduce over the next 12 months? (Excl. new activities introduced in 2015)

Base: 2014 – all respondents (n = 946); 2015 – all respondents (n=984)

Organisations experience a range of operational, behavioural and financial barriers to using digital technologies. Many appear to underestimate the complexity of digital projects and lack the experience necessary to deliver:

*It has sometimes been challenging to undertake large, complex web projects where the organisation has sought to deliver something very ground-breaking without the experience necessary to manage such an initiative.*

Anonymous

*Live streaming of events is always more resource-heavy and challenging than hoped or expected.*

Broadway [regional arts and media venue]

Also, training staff in the skills required for digital projects can be expensive and time-consuming:

*What we are never truly aware of is the amount of time and therefore cost required to train and develop the skills needed for the successful application of new technologies. And while we attempt to keep up with new ideas, with a small organisation like ours time is hugely significant and we just aren't able to learn to the level we wish we could.*

Attik Dance [dance company]

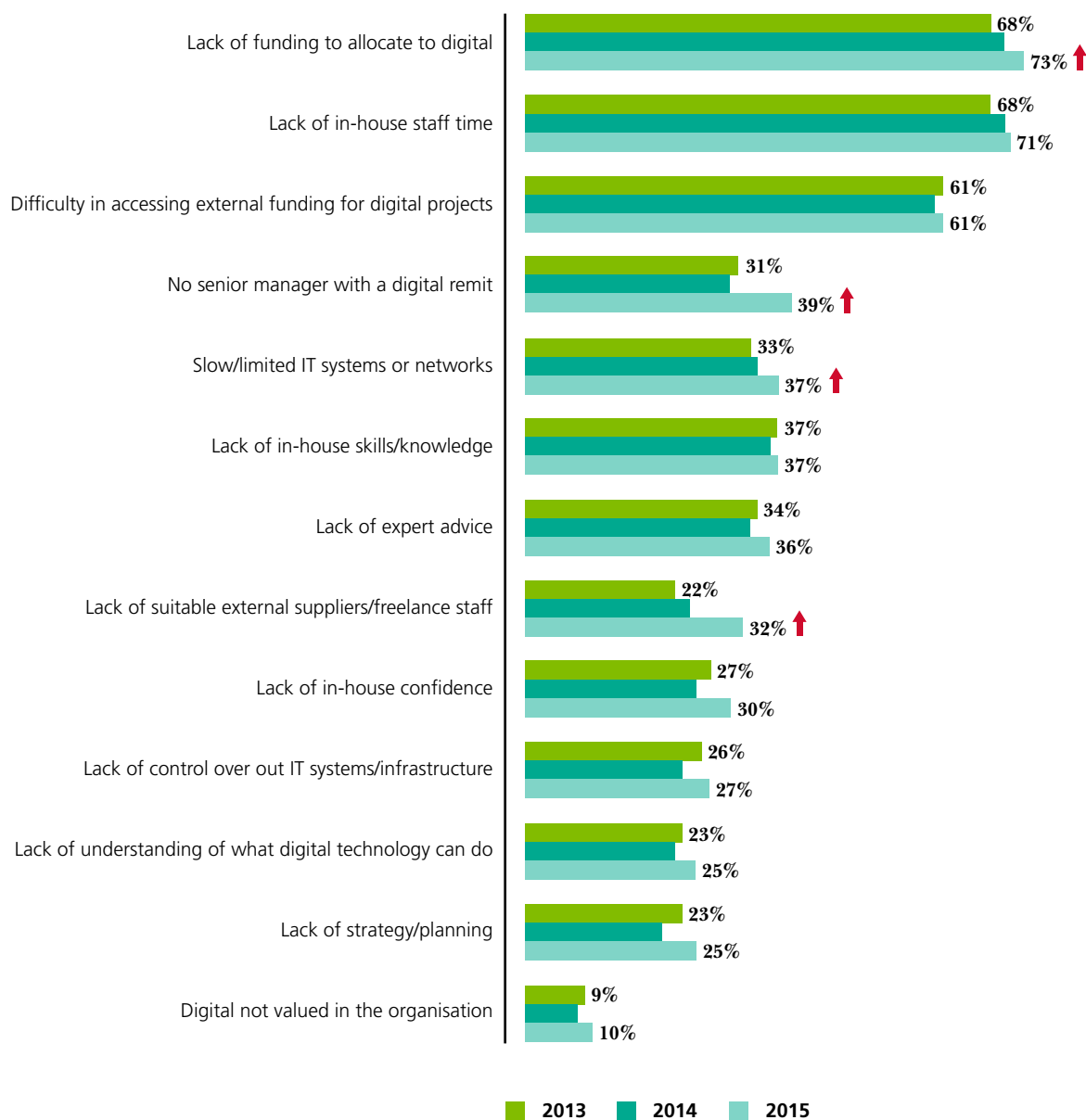
In many cases, these sorts of barriers to digital innovation have become more widespread over the three years data have been collected – four of the 13 barriers are mentioned more frequently, as shown in Figure 10. Lack of funding and time remain the most commonly reported issues, but the biggest change has been in the number of organisations that report a lack of suitable external suppliers as a barrier – this has risen from 22 per cent in 2013 to 32 per cent in 2015. In addition, simple, yet hard to overcome digital infrastructure problems, such as poor internet access, remain an issue for many organisations:

*Though we are based in the middle of a town and part of a large conurbation, our internet keeps collapsing, we can't get access to fibre broadband. This causes problems on a daily basis with simple things like email, updating website etc. It is a simple problem but puts a spanner in the works of a lot of digital work.*

Black Country Touring [theatre events organiser and promoter]



Soundlab, Digital R&D Fund for the Arts event, Source: Heart n Soul

**Figure 10: Top 10 barriers to achievement of digital aspirations**

To what extent do you see each of the following as barriers to achieving your organisation's aspirations for digital technology? Respondents scored barriers out of 5 where 5 meant a significant barrier – here a barrier is defined as 4-5 out of 5 (Arrows indicate statistically significant differences at the 95 per cent confidence level)

Base: 2013 – all respondents (n = 881); 2014 – all respondents (n = 942); 2015 – all respondents (n = 975)

Notwithstanding these persistent barriers and declining levels of activity in 2015, 78 per cent of organisations still planned to try new digital activities next year. The proportion of organisations intending to try new things is fairly consistent across art and cultural forms and organisation sizes, and the top three most anticipated new activities for 2016 are the same as for 2015 – crowdfunding, online donations and selling products online.<sup>25</sup>

## 5 How is digital technology impacting arts and cultural organisations?

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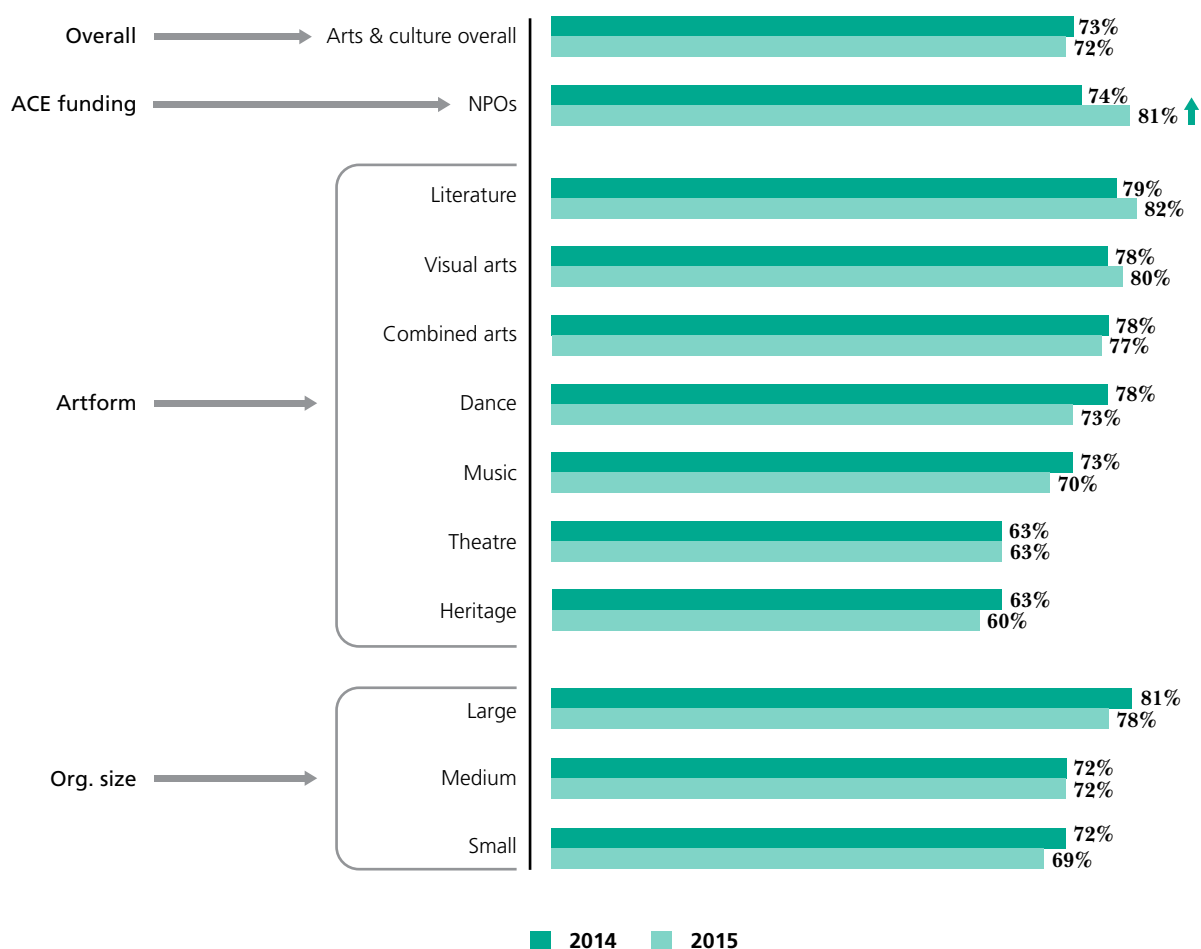
### 5.1 The impact of digital

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In spite of the falling levels of perceived importance and digital activity discussed above, the proportion of organisations who say that digital technologies are having a major positive impact on their ability to fulfil their overall mission has stayed consistent over time (as shown in Figure 11).<sup>26</sup> Important differences between organisation types do, however, persist – reported impact for heritage (which includes museums) and theatre organisations is substantially lower than for literature and visual arts, and the benefits of digital are being felt by fewer small organisations when compared with large. Note that this question was not asked in 2013, so the comparison is being made just between 2014 and 2015.



Making Digital Work event. Source: Nesta

**Figure 11: Organisations experiencing major positive impact overall from digital technology**

Overall, how great an impact do you feel digital technology has had on your organisation's ability to fulfil its mission effectively? Organisations indicating major/fairly major impact (Arrows indicate statistically significant differences at the 95 per cent confidence level)

Base: 2014 – all respondents (n = 943), NPOs (n=431), literature (n=58), visual arts (n=144), combined arts (n=132), dance (n=49), music (n=132), theatre (n=247), heritage (n=87), large (n=277), medium (n=304), small (n=299); 2015 – all respondents (n = 983), NPOs (n=363), literature (n=63), visual arts (n=139), combined arts (n=104), dance (n=69), music (n=162), theatre (n=207), heritage (n=120), large (n=267), medium (n=290), small (n=350)

When we look at particular aspects of organisations' work, however, we see the impact of digital waning in 2015, with several areas in decline and just one (impact on revenue) showing a net increase compared with 2013. This might conceivably be because digital technologies may have had a major impact on a particular area when first introduced, but as they have become part of 'business as usual' the impact has lessened over time. However, it may equally be the case that optimism held by some organisations about new digital projects has given way to a more pragmatic reality.

As shown in Figure 12, six impact areas have registered a significant decline since 2013, and there may be a connection between the falls in perceived importance of digital technology for creation and distribution seen earlier and the falls in impact shown for production, collaboration, exhibition and distribution. Distribution through livestreaming in particular is an area in which several organisations have reported mixed feelings through their qualitative feedback. They report a range of issues holding back the impact of their livestreaming work, such as cost considerations, worries about audience cannibalisation, and disappointment with output quality:



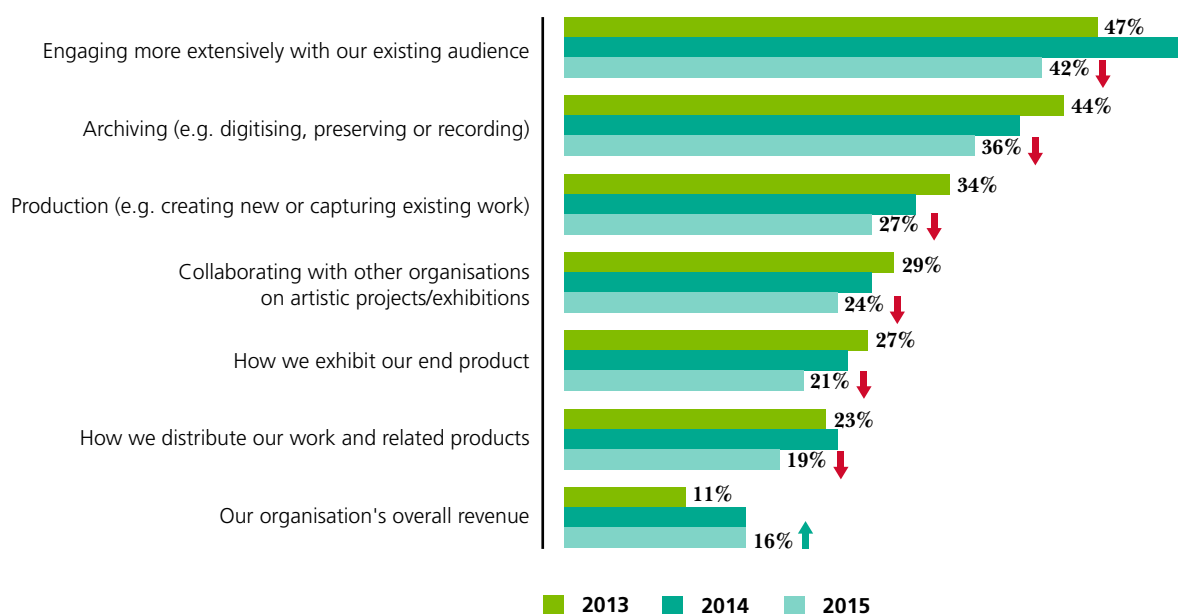
*We enjoyed live streaming a production the previous year, but have not continued to do this over the last financial year. The cost in doing this and risk that people will decide not to attend the live production were barriers.*

Belgrade Theatre [theatre in Coventry]

*Our initial live-streaming pilot in 2014 did not lead to high-quality video, so we want to re-assess our options in this area before attempting it again.*

Company of Angels [theatre company]

**Figure 12: Areas showing a significant change in the proportion of organisations experiencing major positive impacts (ordered by size of change)**



Over the past 12 months, would you say use of the internet and digital technology has had a MAJOR positive impact on each of the following ... ? (Organisations indicating major impact). (Arrows indicate statistically significant differences at the 95 per cent confidence level)

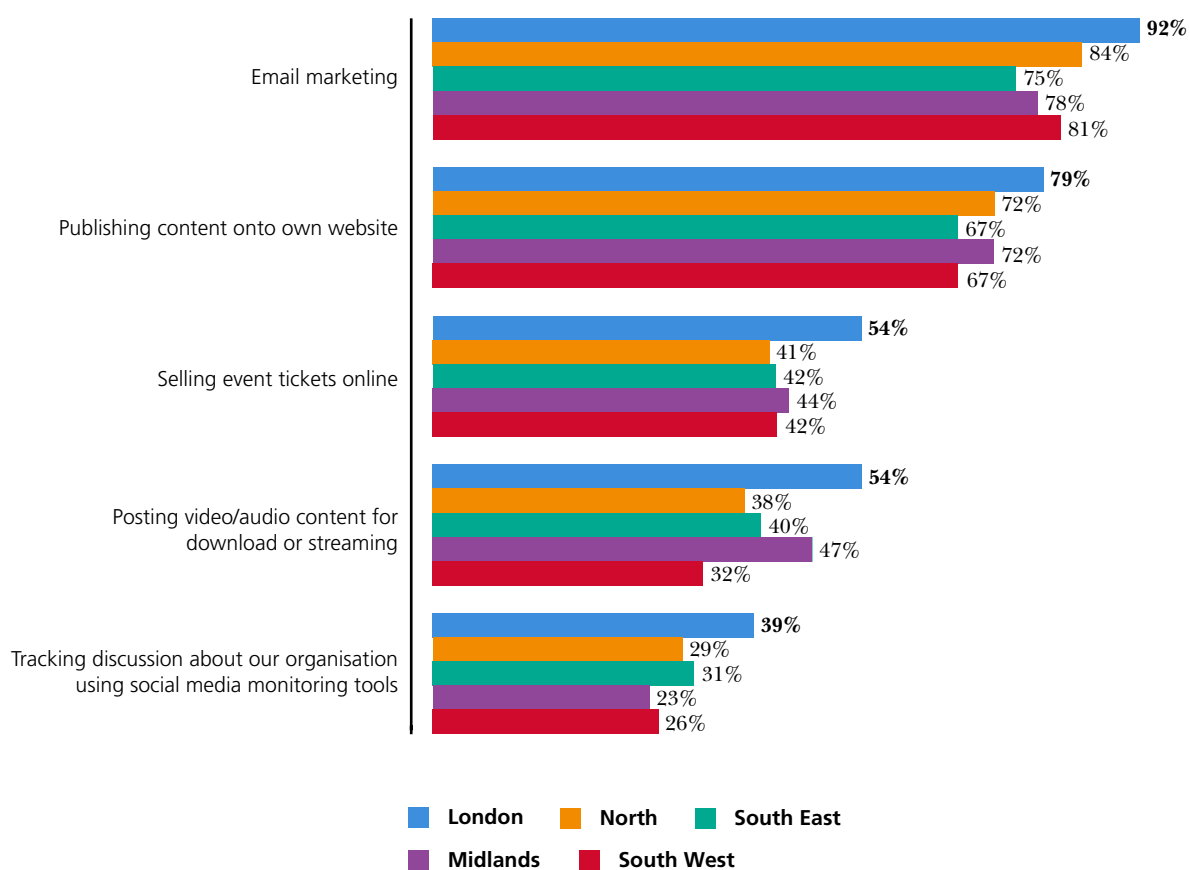
Base: 2013 – all respondents (n = 891); 2014 – all respondents (n = 947); 2015 – all respondents (n = 984)

These falls are most noticeable amongst medium-sized organisations (defined as having turnover of £100,000 – £500,000 per year) – eight significant decreases out of the 22 areas that were tested in all three years. Larger organisations (with turnover greater than £500,000), by contrast, are continuing to see more impact (two significant increases, four decreases), as are smaller organisations (one increase, one decrease). In terms of art and cultural form, Music and Combined Arts have seen the biggest drops, echoing the retrenchment we saw earlier in digital activity levels.<sup>27</sup>

## 5.2 Variation by region

There remains a substantial difference in how arts and cultural organisations are engaging with digital technologies in different regions of England – primarily in terms of activities, but also, to a lesser extent, impacts, barriers and skills. Compared with organisations in the South West, for example, London-based organisations are significantly more likely to be undertaking ten out of the 27 different activity areas considered. Northern organisations are next most active, being significantly more likely than organisations in the South West to be doing four out of 27 activities. Overall, this means that London-based organisations are doing an average of 10.6 activities, Northern organisations are doing 9.4, Midlands 9.2, South East 9.0 and South West 8.9. Figure 13 shows the top five activities for which the gap between London and the next region is the largest.<sup>28</sup>

**Figure 13: Top 5 activities for which London organisations are more active than the rest of the country**



Now thinking about your organisation's digital activities, please indicate which of the following your organisation currently does (All values are statistically significantly at 95 per cent confidence lower than the values for the London region, with the exception of: Publishing content onto own website, Midlands; Post video/audio content for downloading or streaming, Midlands; Track discussion about our organisation using social media monitoring tools, South East)

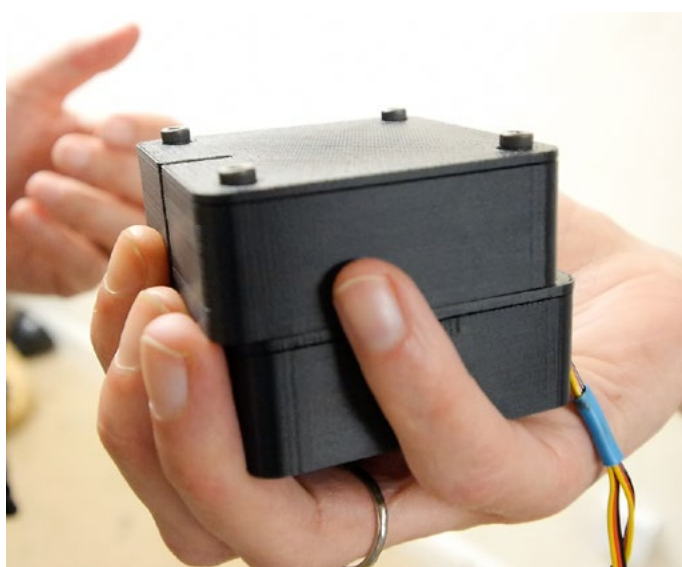
Base: 2015 – London (n=286), North (n=248), South East (n=186), Midlands (n=142). South West (n=122)

This gap in digital activities between organisations in London and other parts of England feeds through into impact levels, although it is less pronounced, and indeed Northern organisations appear to be benefitting as much as, if not more than, their London counterparts. When asked about the overall impact of digital technology on their ability to deliver their mission, there is no statistically significant difference between regions, but at a granular level Northern organisations are significantly more likely to report major positive impacts in

Embodied Audio Visual Interaction Group, Goldsmiths University at Soundlab event, Source: Heart n Soul



Haptic Device, Source: Extant



two areas compared with London (revenue and profitability) and in four areas compared with the South East and South West.

As with activities, it is organisations in the South East and South West that seem to have been the least affected by digital technology. There are some specific regional differences that are of interest. London-based organisations are more likely to report impacts on audience development: for example, 38 per cent of London-based organisations report a major positive impact on reaching an international audience (the average is 30 per cent and the next highest region is the Midlands with 28 per cent); 21 per cent of Northern organisations report a major positive impact on profitability (the average is 14 per cent and the next highest region is the Midlands with 17 per cent).<sup>29</sup>

There are also fewer differences between the regions, in terms of reported barriers and access to skills in particular, although London-based organisations seemingly encounter fewer such impediments, and organisations in the South (particularly the South West) encounter more. Specifically, organisations in the South West are significantly more likely to report barriers in five out of the 13 areas tested, for example: 79 per cent say lack of time is a problem (compared with 71 per cent of all organisations) and 46 per cent cite lack of in-house skills/knowledge (compared with 37 per cent of all organisations). Meanwhile, organisations in the South East are more likely to have difficulties sourcing suppliers and advice: 43 per cent say lack of expert advice is an issue (compared with 36 per cent of all organisations), and 41 per cent are being held back by lack of external suppliers or freelancers (compared with 32 per cent in the whole sample).<sup>30</sup>

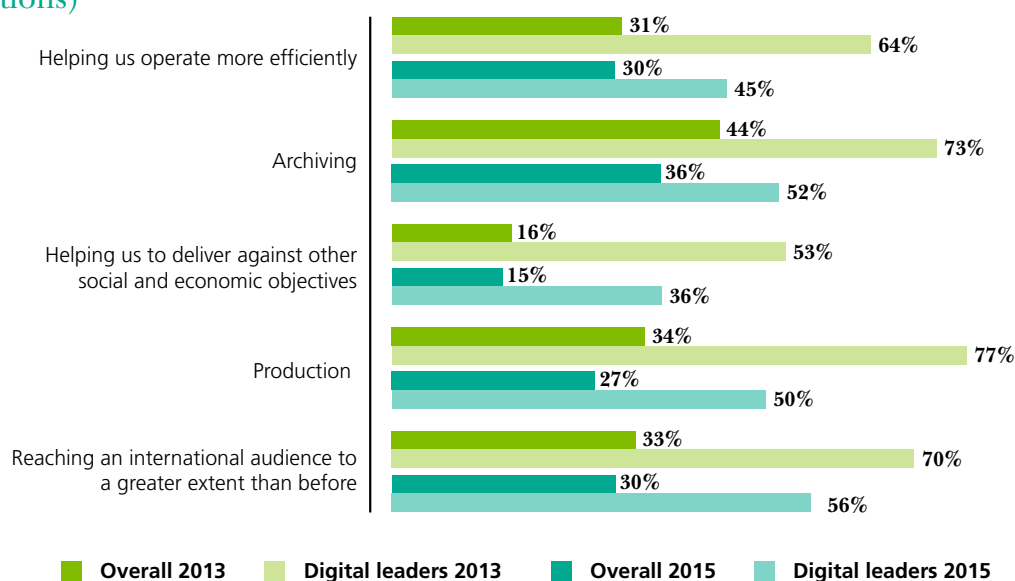
When it comes to skills, London again is better off, followed by organisations in the North of England, with those in the South being least well-served. The biggest gaps are in the areas of rights clearance (26 per cent of London organisations are well-served, 10 per cent in the South East and 12 per cent in the South West) and legal advice around IP (31 per cent of London organisations are well-served, 11 per cent in the South East and 14 per cent in the South West). Organisations in the North of England are better off when it comes to digital marketing skills – 72 per cent feel well-served, compared with 61 per cent in the South East and 62 per cent in the South West.<sup>31</sup>

### 5.3 Digital leaders

In 2013, we isolated the top 10 per cent of organisations that attributed the greatest importance to digital, and we looked at what singled out their behaviours and characteristics (in that report we labelled them 'digitati'). They turned out to be much more digitally active than other arts and cultural organisations, and experienced much higher levels of impact, particularly in areas such as revenue and profitability. In 2015, the 10 per cent who place most emphasis on the importance of digital – the digital leaders – are again much more active, undertaking 13.7 digital activities on average compared with 9.5 in the sector as a whole. They are significantly more likely to be carrying out more complex creation and distribution activities – for example, 57 per cent say they are creating standalone digital exhibits or works (compared with 23 per cent for the whole sector), and they are leading the way in revenue generation too, with 26 per cent using third-party platforms to generate revenue, compared with 8 per cent for the sector as a whole. Although they are not made up of the same organisations, the 2013 and 2015 groups of 'digital leaders' are similar in their make-up, for example: the breakdown by art and cultural form is fairly consistent (in both years, combined arts organisations made up the largest share and dance the smallest); in 2013, 13 per cent were NPOs, compared with 12 per cent in 2015; and small organisations make up a larger share than large organisations (in 2013, 44 per cent were small and in 2015 this has risen to 52 per cent).<sup>32</sup>

As in 2013, the digital leaders in 2015 are much more likely than average to be experiencing positive impacts from digital technology across all areas of their businesses – higher levels of activity translate into impacts. However, when we compare our 2015 digital leaders to their counterparts in 2013 specifically, we see that whilst activity levels look fairly similar (with just two activities with lower reported levels), the net impacts are consistently lower – the proportion of 2015 digital leaders reporting a major positive impact from digital technology is significantly lower in five areas and higher in only one (donations and fundraising) compared with 2013.<sup>33</sup> Falling impacts may be explained simply as a plateau effect – that 'impact' is primarily experienced when an organisation changes something or does something new, and is subsequently hard to sustain. So, digital technologies may still be delivering value in these areas, but this may be felt as less of an impact over time. However, these results mean that, in terms of impacts experienced, the gap between the more digitally-focused organisations and the rest of the sector is closing slightly in most of the areas tested.

**Figure 14: Five impact areas where the gap between digital leaders and other organisations has closed the most (ranked by the reduction in the gap between digital leaders and all organisations)**



Over the past 12 months, would you say use of the internet and digital technology has had a MAJOR positive impact on each of the following ... ?  
(Organisations indicating major/fairly major impact)

Base: 2013 – all respondents (n = 891), digital leaders (n = 80); 2015 – all respondents (n = 984), digital leaders (n = 84)





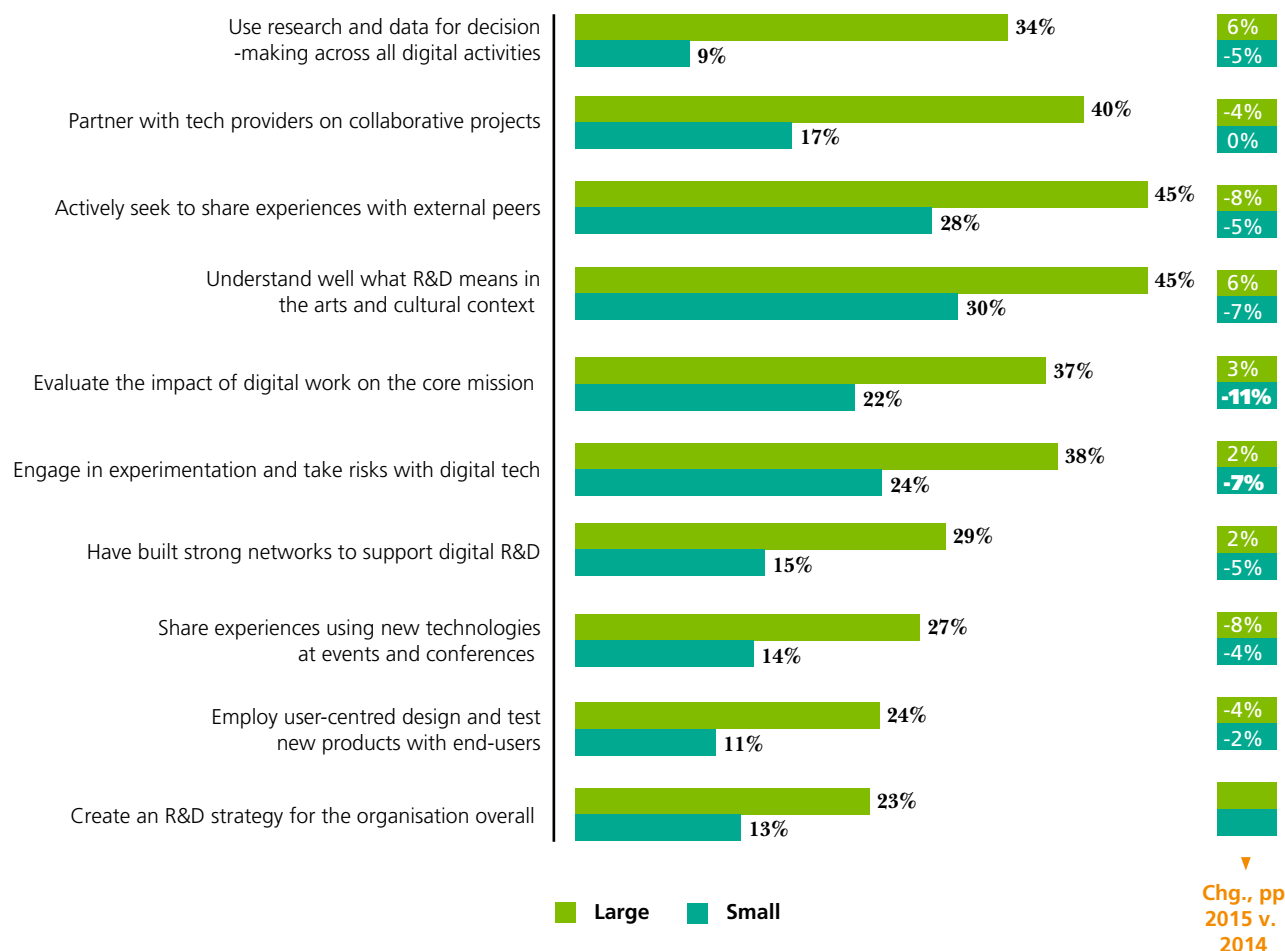
This apparent 'convergence' is also noticeable when looking at the organisations that classed themselves as late adopters – the other end of the spectrum from the digital leaders (although it should be noted that this group is self-identified using a different question within the survey). Although starting from a much lower base, there appear to have been some positive developments in 2015. In the area of audience development, 36 per cent of late adopters report a major positive impact on reaching a bigger audience (24 per cent in 2014), 25 per cent on reaching a more diverse audience (vs. 15 per cent), 20 per cent on reaching an international audience (vs. 8 per cent), and 16 per cent on connecting with new communities (vs. 8 per cent).<sup>34</sup> However, it is worth noting that this analysis is only available from 2014-2015, as the question was not asked in the 2013 survey.

## 5.4 Digital experimenters

As in previous years, organisations that claim to be experimenting or taking risks with digital technology are more likely to report positive impacts – 93 per cent of organisations who self-identify as experimenters report that digital technology has had a major positive impact on their ability to deliver their mission effectively, compared with 72 per cent of the sector as a whole. This effect is particularly strong in creation and distribution, where 67 per cent of experimenters report a positive impact on production and creating new work (compared with an average of 27 per cent) and 45 per cent report a positive impact on how they distribute their work (vs. 18 per cent).<sup>35</sup>

In comparison with 2014, however, fewer organisations now report that they undertake R&D behaviours such as experimentation. For example, 28 per cent say that they experiment and take risks, down from 33 per cent in 2014; and 28 per cent say that they evaluate the impact of their digital work, also down from 33 per cent in 2014.<sup>36</sup> This is particularly the case for smaller organisations who are already much less likely to report that the R&D behaviours surveyed apply to them (Figure 15).

**Figure 15: Organisations exhibiting digital R&D behaviours (in order of difference between large and small organisations). Question was not asked in 2013 so comparison is shown here between 2014 and 2015**



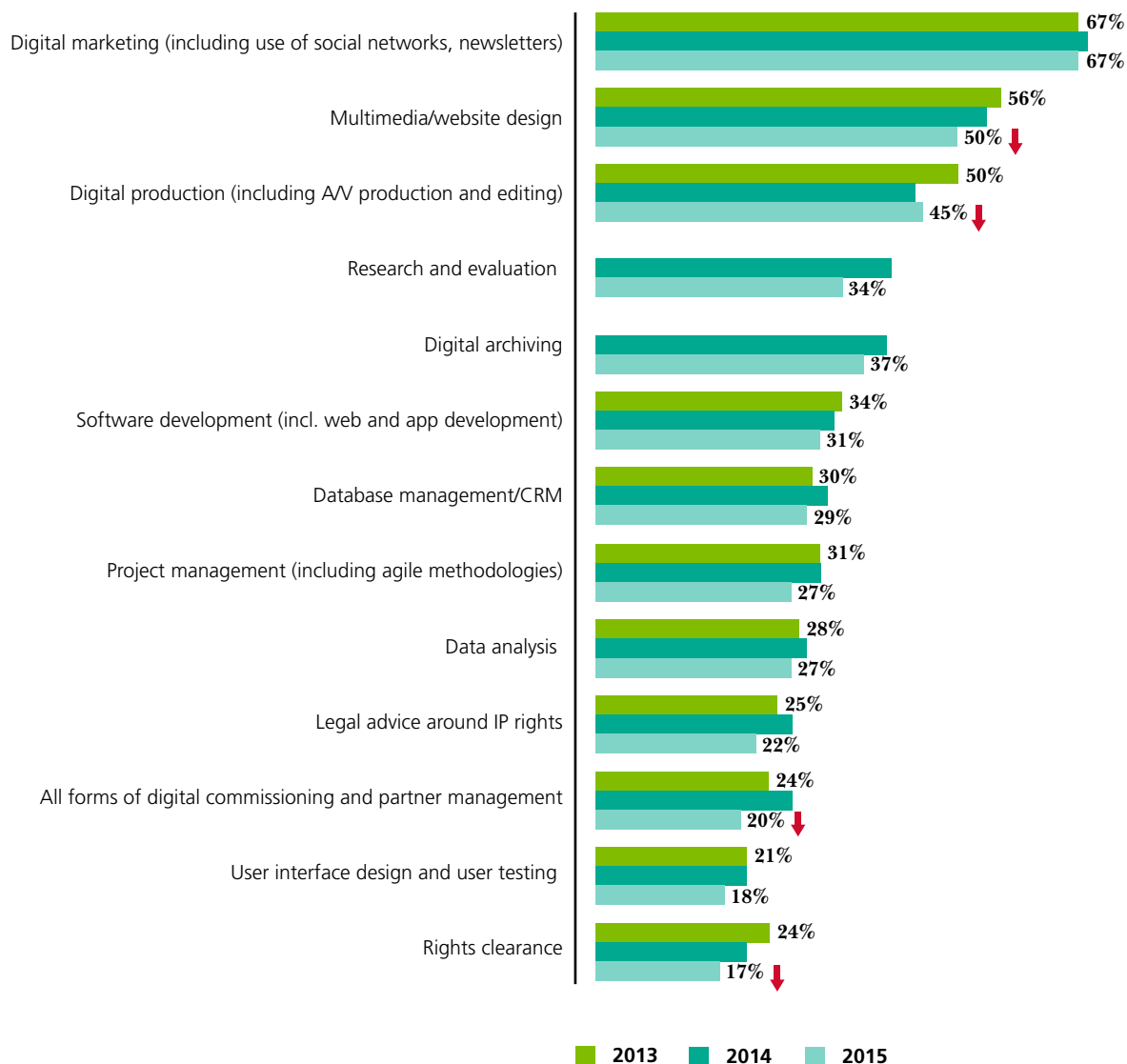
How well do you think the following statements describe your organisation's behaviour with regard to digital R&D? Organisations indicating very well and fairly well (Significant differences at 95 per cent confidence level are highlighted in bold)

Base: 2014 – small organisations (n=298), large organisations (n=350); 2015 – small organisations (n=277), large organisations (n=267)

The survey also tracked some structural and cultural influences on organisations' ability to experiment and pursue digital projects, and in some areas of leadership there have been changes since 2013 that may be feeding through into R&D behaviours. For example, in 2013, 69 per cent of respondents agreed that their senior management was knowledgeable about digital technology and this has dropped to 56 per cent in 2015; similarly, in 2013, 54 per cent reported that coming up with digital ideas was a priority for their senior management team and this has now fallen to 45 per cent. Here, as with R&D behaviours, large organisations have experienced less of a change than small organisations: the proportion of large organisations that say their senior management is knowledgeable about digital technology has remained the same at 59 per cent, whilst for small and medium organisations it has dropped – 76 per cent to 57 per cent for medium and 70 per cent to 55 per cent for small.<sup>37</sup>

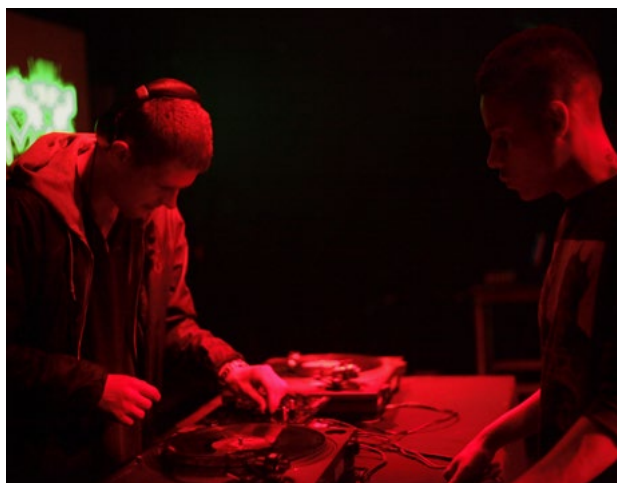
As well as finding it harder to undertake R&D activities and experiment, proportionately fewer organisations also report that they are well-served for the skills they need to execute digital projects. Across almost all of the 13 skills areas surveyed, relatively fewer organisations feel that they are well-served by either internal or external sources – and five of these decreases are statistically significant (Figure 16). This is the pattern for large too – for example, 53 per cent of large organisations now feel well-served for multimedia/website design compared with 69 per cent in 2013, and 47 per cent feel well-served for digital production skills, compared with 62 per cent.<sup>38</sup>



**Figure 16: Proportion of organisations that report they are well-served for digital skills**

Please rate these skills and capabilities according to the extent to which your organisation is well-served for its needs in these areas. (Arrows indicate statistically significant differences at the 95 per cent confidence level)

Base: 2013 – all respondents (n = 879); 2014 – all respondents (n = 940); 2015 – all respondents (n = 971)



Quality of Life Event, Knowle West Media Centre



Soundlab, Digital R&amp;D Fund for the Arts event, Source: Heart n Soul

## 5.5 Arts Council England National Portfolio Organisations (NPOs)

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In 2013 and 2014, it was clear that NPOs as a group were more active and engaged with digital, and were more likely to have experienced positive impacts. In 2015, this was still the case, and if anything, the gap with other organisations has widened further.

In part, this may reflect the typically larger size of NPOs, as larger organisations tend to be more active and more likely to report impacts than smaller organisations. However, even controlling for size, NPOs tend to be more digitally active and report positive impacts (note also that 44 per cent of the NPO sample is small- or medium-sized). This suggests that there may be something specific about the NPO group that means they are more digitally engaged. Whether it is due to the additional support and encouragement they receive around digital technology from Arts Council England and other bodies, or a reflection of the security that a multi-year funding agreement provides, NPOs seem better able to sustain digital activities and to reap the rewards.

Taking activities first, NPOs have continued to increase the number of digital activities they are undertaking, whilst the rest of the sector has not – the average number of activities for an NPO in 2015 is 12.9, up significantly from 11.4 in 2013, compared with the sector average which has not changed significantly (9.2 in 2013 and 9.5 in 2015). For NPOs, four activities are significantly more often cited (paid search and/or online display, educational content or online events, cloud computing, and selling event tickets online) and only one significantly less so (own branded website). On average, NPOs added 3.2 new activities in the previous year, more than the average of 2.7.<sup>39</sup>

In other areas of activity, such as mobile, NPOs are continuing to develop, whilst non-NPOs in the sample have, as a group, scaled back. Sixty-nine per cent of NPOs now have a mobile-optimised web presence, up significantly from 61 per cent a year ago, whilst the sector as a whole has not changed significantly and now stands at 59 per cent.<sup>40</sup> NPOs have also been able to continue doing a range of data-led activities such that none of the areas surveyed have seen significant falls since 2013, and growth is evident in some areas – for example, 77 per cent of NPOs now report using data to understand their audience better, up from 68 per cent in 2013.<sup>41</sup> This continued activity is also reflected in the barriers felt by NPOs. Whereas four barriers have become significantly more widespread for the sector on average, for NPOs all the barriers tested have remained at roughly the same levels.<sup>42</sup>

Higher levels of activity and lower barriers relative to the sector as a whole feed through into consistently higher levels of reported impact for NPOs. Eighty-one per cent of NPOs now report that digital technology has had a major positive impact overall on their ability to fulfil their mission effectively. Last year, this figure was significantly lower, at 74 per cent, and very similar to the sector average of 73 per cent, but whilst the NPO proportion has gone up since 2014, the average for the sector has stayed roughly the same (72 per cent).<sup>43</sup> When asked about individual areas of impact, the gap is also clear. NPOs have not seen any significant falls in impact, and in two areas the proportion reporting a major positive impact has increased considerably since 2013 – selling tickets online (44 per cent compared to 35 per cent in 2013) and reaching a younger audience (34 per cent vs. 27 per cent).<sup>44</sup>

The final result worth highlighting is R&D-related activity, where NPOs again are more likely to have sustained or grown their activities: 33 per cent of NPOs in 2015 say they share experiences using new technologies at conferences, significantly up from 25 per cent in 2014 (compared with 19 per cent for the sector as a whole in 2015, down from 23 per cent in 2014).<sup>45</sup> Despite their impacts, R&D behaviours like these can require high levels of commitment from organisations. It seems that NPOs have been more able than other organisations to continue technology-related innovation, despite the additional resource implications.

## 6 Conclusion

Three years of the *Digital Culture* survey reveal that digital technologies are having a profound effect on arts and cultural organisations. Almost three-quarters now believe that they have experienced a major positive impact overall on their ability to deliver their mission effectively. For a large majority of organisations, digital technology has become indispensable to the way they promote, preserve and operate their businesses, and for more than half it is an important part of how they create, distribute and generate revenue from their work.

Large and small organisations alike have responded to the digital challenge by adopting a wide range of activities, which has delivered impacts across the full spectrum of their business areas – most notably, the proportion of organisations reporting a major positive impact from digital on revenues has risen from 11 per cent in 2013 to 16 per cent in 2015. Although this year the adoption of digital activities and levels of impact have fallen back from the increases reported last year, many arts and cultural organisations remain ambitious to try new things. For example, over three-quarters (78 per cent) are planning to introduce something new next year, crowdfunding being the most anticipated activity.

This year's survey, however, indicates several areas where digital activity has fallen since the study commenced in 2013. In 2015, several activities have become significantly less widespread and levels of impact have dropped in key areas such as distribution and creation.

There remain a small number of organisations which operate without basic digital tools such as a website, Facebook page or email marketing strategy. Further to this, 40 per cent of organisations still do not have a mobile-optimised web presence and take-up of value-adding data activities appears to have stalled, despite large improvements here over the past three years. Introducing new digital initiatives appears to be more difficult. The financial and organisational barriers preventing organisations from realising their digital aspirations have become more widespread and the number of organisations that feel well-served for digital skills has decreased in several areas.

One interpretation of these findings is that in many arts and cultural organisations, particularly the smaller ones, an earlier appetite for more digital innovation has been replaced by greater caution.

However, it continues to be the case that it is the digital experimenters (those that are willing to embrace and take risks with technology) and digital leaders (those that place the most importance on digital) that are most likely to see positive impacts on their organisations – in the audiences they reach, the way they operate, and in their creative capacities.

# 7 Endnotes

1. Note that this question was not asked in 2013 so the comparisons made are between 2014 and 2015.
2. The 2013 report is available here: <http://artsdigitalrnd.org.uk/digitalcultureresearch/>
3. The main 2014 report and a series of fact sheets about different organisation types are available here: <http://artsdigitalrnd.org.uk/features/digitalculture2014/>
4. Arts Council England National Portfolio Organisations and Major Partner Museums.
5. Note that the number of NPOs/MPMs went down in 2015 from 712 to 684. This means the response rate from this group has been 57 per cent in 2013, 64 per cent in 2014 and 57 per cent in 2015.
6. In this report small is having an annual turnover of less than £100,000, medium is from £100,000-500,000 and large is greater than £500,000.
7. Total universe size of 6,503, including 693 NPOs and 1,138 museums.
8. For more details on the methodology please refer to the 2013 report, available here: [http://artsdigitalrnd.org.uk/wp-content/uploads/2013/11/DigitalCulture\\_FullReport.pdf](http://artsdigitalrnd.org.uk/wp-content/uploads/2013/11/DigitalCulture_FullReport.pdf)
9. By consistent here we mean that the full sample and the returning 'panel' sample do not contradict one another. There are cases when the full sample may show a statistically significant change over time but the panel sample does not, at least in part because it is much smaller, so a higher degree of movement is needed in order to deliver a change that is statistically significant at a 95 per cent confidence level.
10. Base: 2013 – Theatre orgs. (n = 221), Literature orgs. (n = 54); 2014 – Theatre orgs. (n = 246), Literature orgs. (n = 58); 2015 – Theatre orgs. (n = 207), Literature orgs. (n = 64).
11. Base: 2013 – Heritage orgs. (n = 106), Combined arts orgs. (n = 99); 2014 – Heritage orgs. (n = 87), Combined arts orgs. (n = 132); 2015 – Heritage orgs. (n = 120), Combined arts orgs. (n = 104).
12. Base: 2013 – small organisations (revenue under £100k) (n = 301), large organisations (revenue over £500k) (n = 246); 2014 – small organisations (n = 297), large organisations (n = 278); 2015 – small organisations (n = 350), large organisations (n = 266).
13. Base: 2013 – NPOs (n = 391), NPOs (n = 431), NPOs (n = 362).
14. Base: 2013 – Combined Arts (n=99), Literature (n=54); 2015 – Combined Arts (n=104), Literature (n=64).
15. Base: 2013 – all respondents (891), Theatre (n = 220); 2015 – all respondents (984), Theatre (n = 207).
16. Base: 2013 – all respondents (n = 891); 2014 – all respondents (n = 947); 2015 – all respondents (n = 984).
17. Base: 2013 – all respondents (n = 891); 2014 – all respondents (n = 944); 2015 – all respondents (n = 982).
18. Base: 2014 – all respondents (n=923); 2015 – all respondents (n=963). This question was not asked in 2013.
19. DeMers, J. (2015) Why your organic Facebook reach is still falling. 'Forbes.' 13 May 2015.
20. Base: 2013 – all respondents (n = 887), large organisations (n = 245); 2014 – all respondents (n = 944), large organisations (n = 276); 2015 – all respondents (n = 983), large organisations (n = 267).
21. Ratcliff, C. (2015) 50+ fascinating stats about mobile commerce in the UK: 2015. Econsultancy. June 2015. Data from a survey of 3,000 marketers and digital professionals working for businesses that sell directly to consumers.
22. Base: 2013 – all respondents (n = 879); 2014 – all respondents (n = 935); 2015 – all respondents (n = 979).
23. Base: 2014 – all respondents (n=946); 2015 – all respondents (n=984).
24. Base: 2014 – NPOs (n=432); 2015 – NPOs (n=363).
25. Base: 2014 – all respondents (n = 946); 2015 – all respondents (n = 982).
26. Base: 2014 – NPOs (n = 431); 2015 – NPOs (n = 363).
27. Base: 2013 – small (n=301), medium (n=289), large (n=246), music (n=121), combined arts (n=99); 2014 – small (n=299), medium (n=305), large (n=278), music (n=133), combined arts (n=132); 2015 – small (n=350), medium (n=291), large (n=267), music (n=162), combined arts (n=104).
28. Base: 2015 – London (n=286), North (n=248), South East (n=186), Midlands (n=142), South West (n=122).
29. Base: 2015 – all respondents (984), London (n=286), North (n=248), South East (n=186), Midlands (n=142), South West (n=122).
30. Base: 2015 – all respondents (975), London (n=281), North (n=248), South East (n=185), Midlands (n=140), South West (n=121).
31. Base: 2015 – London (n=286), North (n=248), South East (n=186), Midlands (n=142), South West (n=122).
32. Base: 2013 – digital leaders (n=80); 2015 – all respondents (n=984), digital leaders (n=84). Note that the 2015 digital leaders have been defined in the same way as in 2013, but that they are different organisations (although there may be overlap).
33. Base: 2013 – digital leaders (n=80); 2015 – digital leaders (n=84).
34. Base: 2014 – late adopters (n=128); 2015 – late adopters (n=172).
35. Base: 2015 – all respondents (n=983), experimenters (n=145).
36. Base: 2015 – all respondents (n=984); 2014 – all respondents (n=945).
37. Base: 2015 – all respondents (n=891), large (n=267), medium (n=291), small (n=350); 2013 – all respondents (n=984), large (n=246), medium (n=289), small (n=301).
38. Base: 2013 – large (n=246), 2014 – large (n=278); 2015 – large (n=26).
39. Base 2014 – all respondents (n=947), NPOs (n=432); 2015 – all respondents (n=984), NPOs (n=363).
40. Base: 2014 – all respondents (n=944), NPOs (n=431); 2015 – all respondents (n=983), NPOs (n=362).
41. Base: 2015 – all respondents (n=979), NPOs (n=358).
42. Base: 2015 – all respondents (n=975), NPOs (n=358).
43. Base: 2014 – all respondents (n=943), NPOs (n=431); 2015 – all respondents (n=983), NPOs (n=363). Note that this question was asked differently in 2013, meaning the figures are not comparable. As a result the 2014/15 comparison is used here.
44. Base: 2014 – NPOs (n=431); 2015 – NPOs (n=363).
45. Base: 2014 – NPOs (n=431); 2015 – NPOs (n=363).



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