Visual Arts

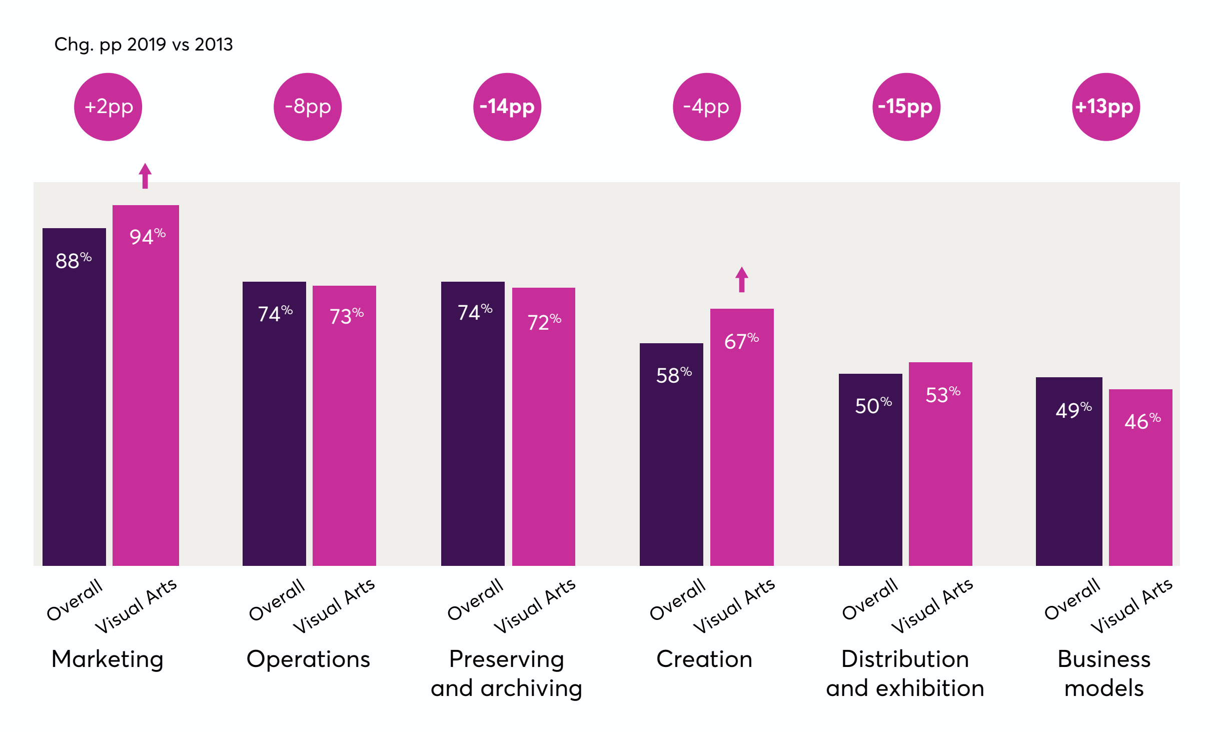
One hundred and fifty-nine Visual Arts organisations participated in the 2019 Digital Culture survey which evaluates how arts and cultural organisations in England use digital technology. They include organisations of different sizes from across England, giving us a picture that reasonably reflects how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

Importance of digital technology

Most important for →	Marketing
Least important for →	Business models

In common with the sector overall, the business area where the highest proportion of Visual Arts organisations say digital technology is essential/important is marketing; but Visual Arts organisations are even more likely to say that digital technology is essential/important in this area (94 per cent of Visual Arts organisations, compared to 88 per cent of the sector overall). Visual Arts organisations are also more likely than the sector overall to consider digital to be essential/important for creation: 67 per cent of Visual Arts organisations say this, compared to 58 per cent of the sector.[2]

Figure 1: Importance of digital (essential/important) to different areas – whole sector vs Visual Arts, 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 the sector.

Base: 2019 – all respondents (n = 1,113), 2019 – Visual Arts organisations (n = 157), 2013 – Visual Arts organisations (n = 152).

Compared to 2013, and in line with the sector overall, perceptions of digital being essential/important for business models have increased from 33 per cent of Visual Arts organisations in 2013 to 46 per cent in 2019. However, in four of the six business areas tested in the survey perceptions of digital being essential/important have trended downwards. The largest declines have been for distribution and exhibition (68 per cent of Visual Arts organisations considered digital essential/important for this area in 2013 vs 53 per cent in 2019) and preserving and archiving (86 per cent vs 72 per cent).[3]

Digital activities

Top digital activities →	Email marketing, publishing content on free platforms and publishing content onto our own website
More likely than other other artforms to do… →	Email marketing, selling products/merchandise online, standalone digital exhibits, digital works that are connected to an exhibition/artwork

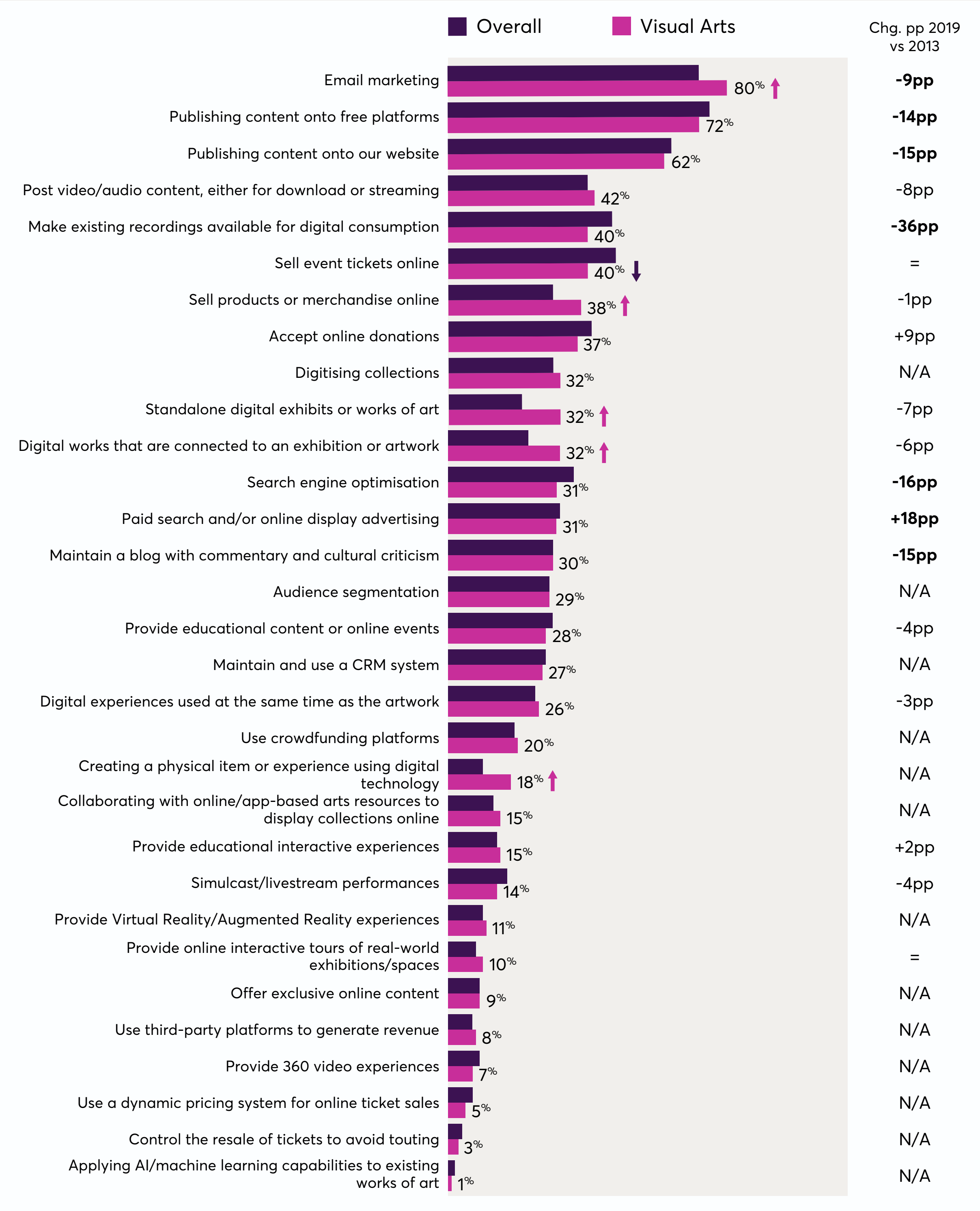
Visual Arts organisations engage in the same number of digital activity types as the sector overall; both, on average, do 8.2 activities.[4]

Visual Arts organisations are notably more likely than the sector overall to engage in five of the thirty-one activity types listed; most of these relate to digital creation: standalone digital exhibits or works of art (32 per cent of Visual Arts organisations produce these vs 21 per cent of the sector), digital works that are connected to an exhibition or artwork, but that offer a distinct experience rather than a recreation of a real-world equivalent (32 per cent vs 23 per cent), creating a physical item or experience using digital technology (18 per cent vs 10 per cent), email marketing (80 per cent vs 72 per cent) and selling products or merchandise online (38 per cent vs 30 per cent). The only digital activity that Visual Arts organisations are less likely to do compared to the sector overall is sell event tickets online on your own website (40 per cent of Visual Arts organisations do this vs 48 per cent of the sector).[5]

Compared to 2013, the average number of digital activity types that Visual Arts organisations do has fallen, from 9.6 in 2013 to 8.2 in 2019. The activities which are notably less prevalent now are making existing recordings or archive material/exhibits available for digital consumption (76 per cent of Visual Arts organisations did this in 2013 compared to 40 per cent in 2019), search engine optimisation (47 per cent in 2013 vs 31 per cent in 2019) and publishing content onto our website (77 per cent in 2013 vs 62 per cent in 2019).[6] For context, the sector overall has also experienced declines in these activity types since 2013, but to a lesser degree than Visual Arts.

The most notable increases in activity types amongst both Visual Arts organisations and the wider sector compared to 2013 are for accepting online donations (28 per cent in 2013 vs 37 per cent in 2019 for Visual Arts and 35 per cent in 2013 vs 41 per cent in 2019 for the sector) and paid search and/or online display advertising (13 per cent in 2013 vs 31 per cent in 2019 for Visual Arts and 14 per cent in 2013 vs 32 per cent in 2019 for the sector).[7]

Figure 2: Digital activities for Visual Arts organisations vs whole 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 – Visual Arts organisations (n = 159); 2013 – Visual Arts organisations (n = 152).

Visual Arts organisations are slightly less likely than the sector overall to have a mobile-optimised web presence (70 per cent of Visual Arts organisations have one, compared to 73 per cent of the sector).[8] The proportion has increased substantially since 2013, when only 40 per cent of Visual Arts organisations had a mobile-optimised web presence.[9]

Of the fifteen social media platforms tested in the Digital Culture survey, both Visual Arts organisations and the sector overall use an average of four. Visual Arts organisations tend to have active profiles on the same social media platforms preferred by the sector overall, with Facebook remaining the most prevalent (89 per cent of Visual Arts organisations vs 92 per cent of the sector). Following this, the most popular platforms amongst Visual Arts organisations are Twitter (86 per cent vs 83 per cent) and Instagram (84 per cent vs 65 per cent).[10] As seen amongst the sector overall, usage of Instagram has increased dramatically since 2013, when only 14 per cent of Visual Arts organisations had a profile on the site.[11]

Visual Arts organisations report similar levels of data-led activities as the sector overall. They engage in an average of 4.6 of the fifteen data-led activities tested in the survey, compared to the sector average of 4.3. Amongst Visual Arts organisations, the most common data-led activities are using data to develop an online strategy (45 per cent of Visual Arts organisations do this vs 41 per cent of the sector) and using analytics and insight from audience/visitor data to improve our website (44 per cent vs 39 per cent).[12]

Compared to 2013, engagement amongst Visual Arts organisations has declined in all fifteen of the data-led activities tested in the survey. The most notable differences are for using data to understand our audience better through data analysis (48 per cent in 2013 vs 41 per cent in 2019), using data to inform the broader strategic direction of our organisation (50 per cent in 2013 vs 43 per cent in 2019) and using data to inform the process of developing new commercial products or services (23 per cent in 2013 vs 16 per cent in 2019).[13]

The positive impact of digital

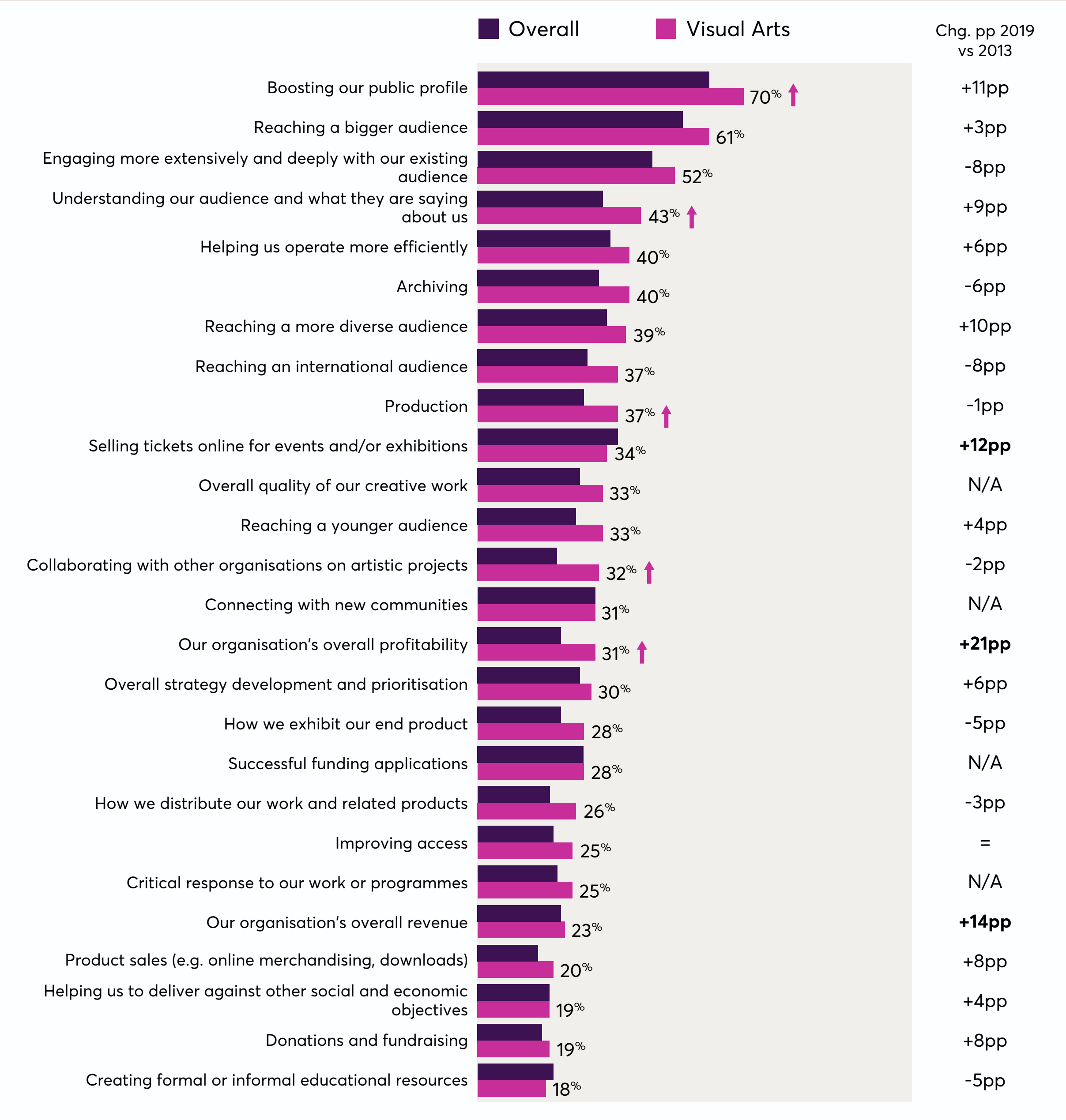
Biggest barrier →	Lack of funding to allocate to digital projects

In the Digital Culture survey, organisations are asked what impact digital technology has on their organisation's ability to fulfil its mission successfully. Within Visual Arts, 68 per cent of organisations report a major or fairly major positive impact (scoring four or five on a five-point scale) on their ability to carry out their mission, which is in line with the sector average of 67 per cent. This proportion has fallen since 2014, when this question was first asked, for Visual Arts organisations (78 per cent in 2014) and for the wider sector (73 per cent in 2014).[14]

Compared to the sector overall, Visual Arts organisations are more likely to report that digital technology is having a major positive impact in twenty-one of the twenty-six activity areas tested in the survey. The positive difference is most notable for collaborating with other organisations on artistic projects or exhibitions (32 per cent of Visual Arts organisations report this vs 21 per cent of the sector) and understanding our audience and what they are saying about us (43 per cent of Visual Arts organisations vs 33 per cent of the sector). Compared to the sector overall, there are only two areas where Visual Arts organisations are less likely to report major positive impact: selling tickets online for events and/or exhibitions (34 per cent vs 37 per cent of the sector) and creating formal or informal educational resources (18 per cent vs 20 per cent of the sector).[15]

The three areas where the proportion of Visual Arts organisations who report a major positive impact has increased the most compared to 2013 all relate to revenue generation. The figure for our organisation's overall profitability has risen from 10 per cent in 2013 to 31 per cent in 2019, for our organisation's overall revenue has it has risen from 9 per cent to 23 per cent, and for selling tickets online for events and/or exhibitions it has risen from 22 per cent to 34 per cent.[16]

Figure 3: Proportion of Visual Arts organisations reporting a major positive impact of digital technology on business areas (Visual Arts 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% 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 – Visual Arts organisations (n = 140); 2013 – Visual Arts organisations (n = 151).

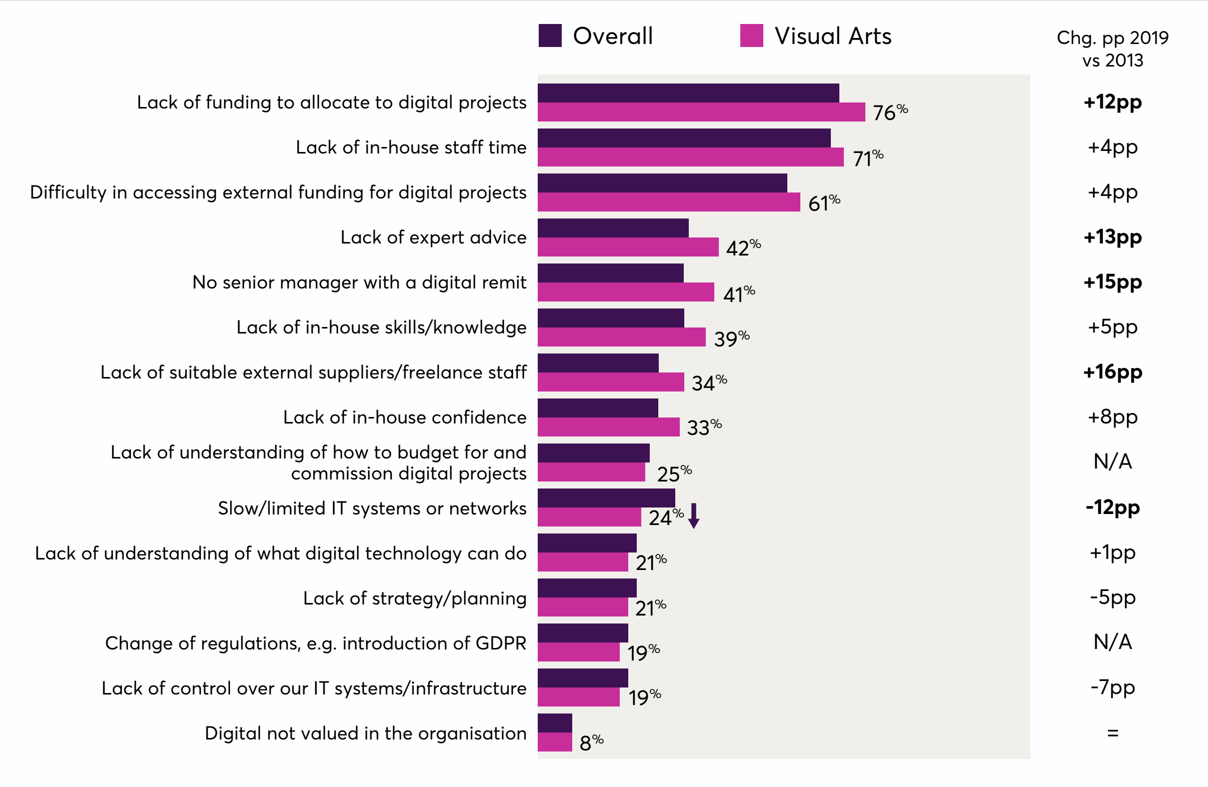
Management factors

Biggest barrier →	Lack of funding to allocate to digital projects

In common with the sector overall, Visual Arts organisations identify the same top three barriers hindering their digital aspirations. These are lack of funding to allocate to digital projects (76 per cent of Visual Arts organisations vs 70 per cent of the sector), lack of in-house staff time (71 per cent vs 68 per cent) and difficulty in accessing external funding for digital projects (61 per cent vs 58 per cent). In all three cases Visual Arts organisations are more likely to report these as barriers compared to the sector overall. Visual Arts organisations are also more likely to report lack of expert advice (42 per cent of Visual Arts organisations vs 35 per cent of the sector) and no senior manager with a digital remit (41 per cent vs 34 per cent).[17] The only barrier that Visual Arts organisations are significantly less likely to report is slow/limited IT systems or networks (24 per cent of Visual Arts organisations reported this vs 32 per cent of the sector).

Since 2013, Visual Arts organisations have reported a greater increase in most of the barriers tested in the survey compared to the sector overall. The largest year on year increases have been for lack of suitable external suppliers/freelancers (this has increased by 16 percentage points, from 18 per cent in 2013 to 34 per cent in 2019 amongst Visual Arts organisations; but only by 6 percentage points amongst the sector, from 22 per cent in 2013 to 28 per cent now) and no senior manager with a digital remit (an increase of 15 percentage points amongst Visual Arts organisations, from 26 per cent in 2013 to 41 per cent now; vs 3 percentage points amongst the sector, from 31 per cent in 2013 to 34 per cent now).[18]

Figure 4: Perceived barriers to achieving digital aspirations, felt by Visual Arts organisations (Visual Arts organisations vs. whole sector, 2019)



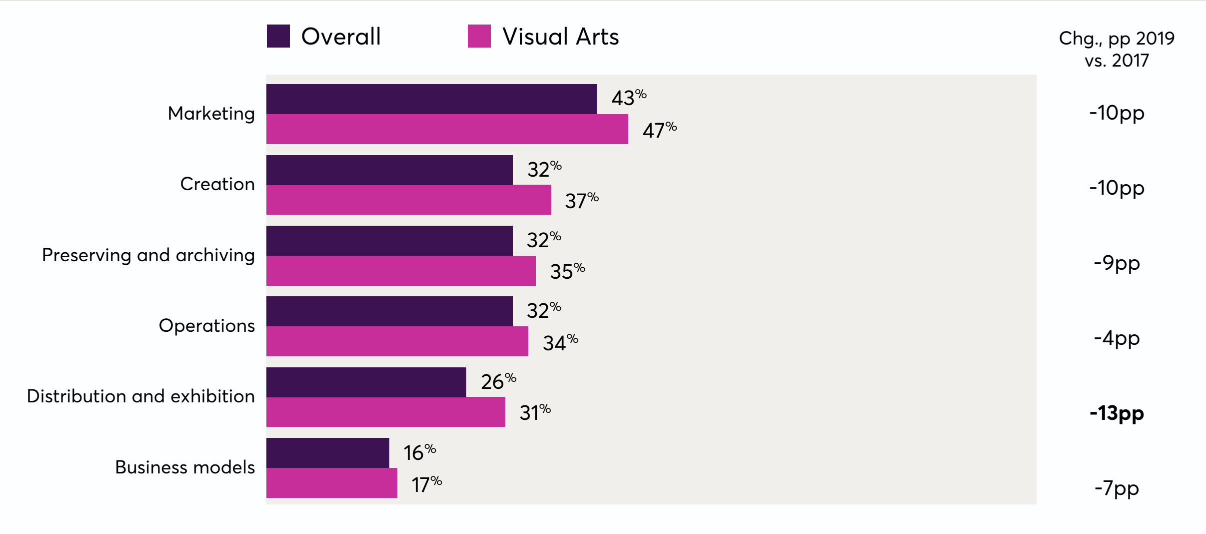
To what extent do you see each of the following as barriers to achieving your organisation's aspirations for digital technology? 'Chg. pp' = Change in percentage points. Statistically significant changes 2013–2019 (at a 95 per cent confidence level) highlighted in bold. Arrows show statistically significant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

Base: 2019 – all respondents (n = 976), 2019 – Visual Arts organisations (n = 137); 2013 – Visual Arts organisations (n = 151).

Across all six digital skills areas tested in the survey (see Figure 5), Visual Arts organisations are more likely than the sector overall to report having advanced digital skills. The area where this is most evident is distribution and exhibition (31 per cent of Visual Arts organisations report advanced skills in this area vs 26 per cent of the sector). In line with the sector overall, the area where the highest proportion of Visual Arts organisations report advanced digital skills is marketing (47 per cent of Visual Arts organisations vs 43 per cent of the sector).[19]

Compared to 2017 (when this question was first asked), fewer Visual Arts organisations now report having advanced digital skills across each of the six skills areas listed, the largest decline is for distribution and exhibition which has dropped 13 percentage points (from 44 per cent in 2017 to 31 per cent in 2019).[20]

Figure 5: Proportion of Visual Arts organisations 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 2017–2019 (at a 95 per cent confidence level) highlighted in bold.

Base: 2019 – all organisations (n = 965), 2019 – Visual Arts organisations (n = 135); 2017 – Visual Arts organisations (n = 170).

Since 2013, the Digital Culture survey has also asked organisations to rate a list of skills and capabilities in eleven key digital technology areas, according to whether they feel well-served or under-served for their needs. 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.

Visual Arts organisations are similar to the sector overall in feeling well-served for their needs. There is only one area out of the eleven listed where Visual Arts organisations are notably more likely to say they are well served: digital commissioning and partner management (38 per cent of Visual Arts organisations feel well-served vs 25 per cent of the sector overall). There are no areas where Visual Arts organisations are notably behind the overall sector.[21]

Compared to 2013, the proportion of Visual Arts organisations who say they are well-served for their needs has fallen across eight of the eleven business areas tested. The largest fall is for digital production, where 43 per cent of Visual Arts organisations felt well-served for their needs in 2013 compared to 27 per cent now. On the other hand, the proportion of Visual Arts organisations who say they are well-served for access to skills in digital commissioning and partner management has increased since 2013, from 31 per cent to 38 per cent in 2019.[22]

Endnotes

1. Please note, our sample size of Visual Arts organisations (n = 159), allows for a margin of error of +/- 8 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 – Visual Arts organisations (n = 157).
3. Q10. Base: Visual Arts organisations in the following years: 2013 (n = 152), 2019 (n = 157).
4. 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 – Visual Arts organisations (n = 159).
5. Q12. Base: 2019 – all respondents (n = 1,134), 2019 – Visual Arts organisations (n = 159).
6. Q12. Base: Visual Arts organisations in the following years: 2013 (n = 152), 2019 (n = 159).
7. Q12. Base: Visual Arts organisations in the following years: 2013 (n = 152), 2019 (n = 159).
8. Q23. Does your organisation currently have a web presence that is optimised for mobile devices? Base: 2019 – all organisations (n = 1,003), 2019 – Visual Arts organisations (n = 142).
9. Q23. Base: Visual Arts organisations in the following years: 2013 (n = 152), 2019 (n = 142).
10. 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 – Visual Arts organisations (n = 144).
11. Q18. Base: Visual Arts organisations in the following years: 2013 (n = 152), 2019 (n = 144).
12. 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 – Visual Arts organisations (n = 144).
13. Q16. Base: Visual Arts organisations in the following years: 2013 (n = 151), 2019 (n = 144).
14. Q35. Overall, how great an impact do you feel digital technology has had on your organisation's ability to fulfil its mission effectively? Base: 2019 – all respondents (n = 994), 2019 – Visual Arts organisations (n = 139); 2014 – Visual Arts organisations (n = 144).
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? Base: 2019 – all respondents (n = 997), 2019 – Visual Arts organisations (n = 140).
16. Q28. Base: Visual Arts organisations in the following years: 2013 (n = 152), 2019 (n = 140).
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 – Visual Arts organisations (n = 137).
18. Q37. Base: Visual Arts organisations in the following years: 2013 (n = 151), 2019 (n = 137).
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 – Visual Arts organisations (n = 135).
20. Q67. Base: 2019 – all respondents (n = 965), 2019 – Visual Arts organisations (n = 135).
21. 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 = 969), 2019 – Visual Arts organisations (n = 135).
22. Q45. Base: Visual Arts organisations in the following years: 2013 (n = 149), 2019 (n = 135).

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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