Museums

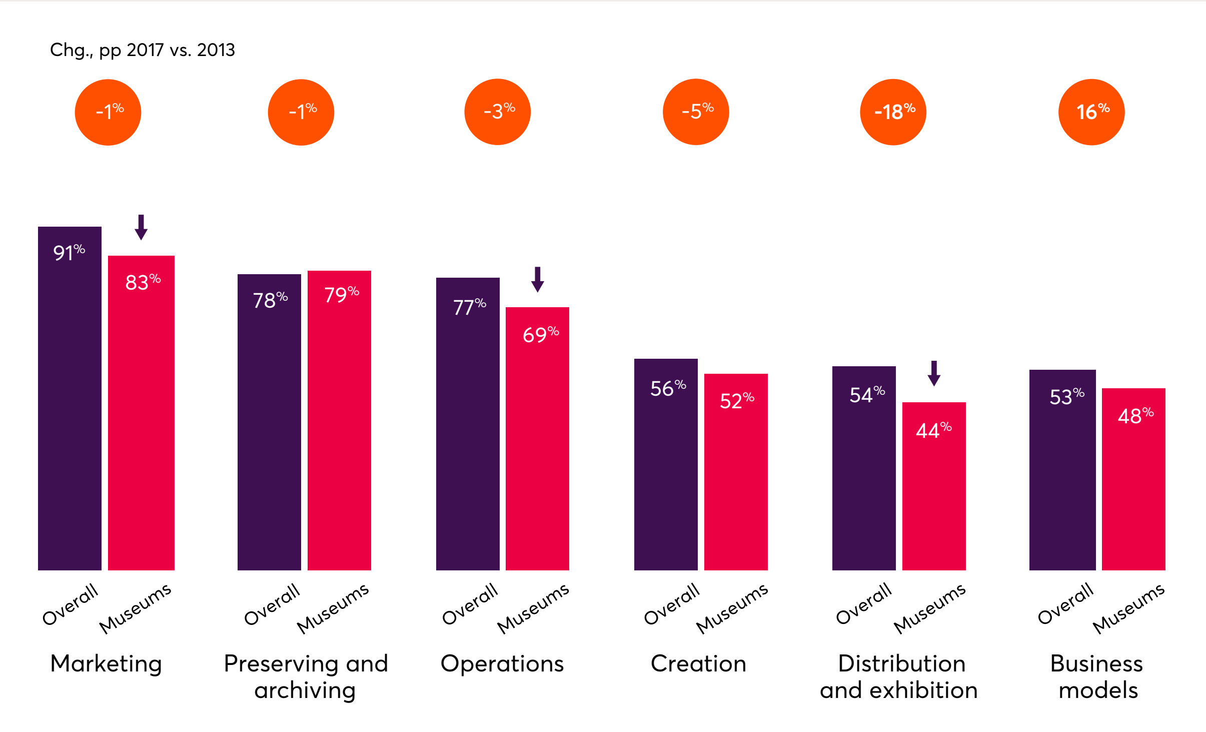
Two hundred and eleven Museums participated in the Digital Culture Survey 2017 of how arts and cultural organisations in England use digital technology. They include organisations of different sizes from across England, giving us a detailed picture of how the Museums sector is using technology to support its work.

Importance of digital technology

Compared to the arts and culture sector as a whole, Museums are significantly less likely to regard digital as important across three out of six activity areas: marketing, operations and distribution and exhibition (see Figure 1). The significant decline in the proportion of Museums that see digital as important for distribution and exhibition has resulted in this being the area where fewest museums consider digital to be important.

Supported using public funding by ARTS COUNCIL ENGLAND

Figure 1: Importance of digital to different business areas (whole sector vs. Museums, 2017)



How important is digital technology to your organisation overall, at the present time, in each of the following areas? Statically significant changes 2013-2017 (at a 95 per cent confidence level) highlighted in bold. Arrows show statistically significant differences vs whole sector.

2017: Museums n=205, Whole sector n=1,391, 2013: Museums n=118.

The significant drop observed here is driven mostly by medium-sized Museums (as defined by turnover),[1] where the proportion who see digital as important for distribution and exhibition has declined by 21 percentage points since 2013 (from 66 per cent to 45 per cent). The decline for small Museums is 11 per cent and for large Museums it is 9 per cent.[2]

Business models is the only area where the proportion of Museums which say that digital is important has significantly increased since 2013.[3] This increase can be seen across all sizes of museum. In 2013, more large Museums placed importance on digital technologies for business models (40 per cent) than did medium-sized (36 per cent) and small Museums (17 per cent). In 2017, 31 per cent of small Museums, 57 per cent of medium-sized Museums and 73 per cent of large Museums say digital technologies are important for business models.[4]

Digital activities

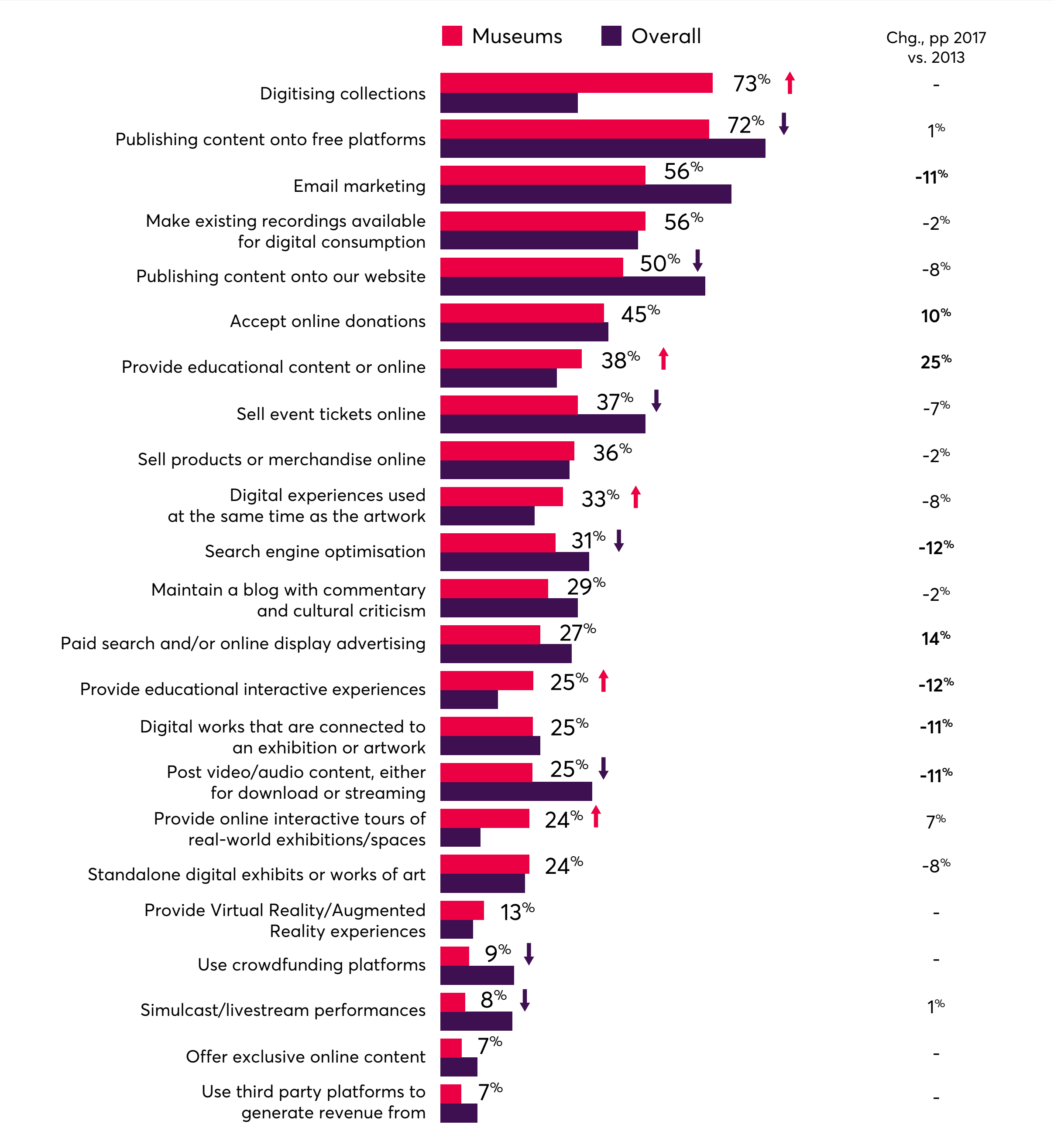
Top digital activities	Digitising collections, publishing content onto free platforms
More likely than other other artforms to…	Digitise collections, provide educational content or online events, provide educational interactive experiences, digital experiences used at the same time as the artwork and interactive tours

Museums engage in a similar number of types of digital activity as the sector as a whole (7.5 vs 7.8). Whilst small and medium-sized Museums do fewer activities than arts and culture sector peers (small Museums do 5.5 types vs. 6.6 for small organisations across the whole sector; medium Museums do 8.0 vs. 8.4), large Museums report doing more types of digital activity than large organisations in the sector as a whole, reporting an average of 11.5[5] (vs 10.8).

As with the sector as a whole, the average number of different types of digital activity has declined significantly since 2013, dropping from 8.8 for Museums in 2013 to 7.5 in 2017.[6]

Predictably, Museums' patterns of engagement tend to differ compared to the rest of the sector. Five types of digital activity, all related to collections management and interpretation, are significantly more common in the Museums sector and eight other types are significantly less common (see Figure 2). There has been a major increase since 2013 in the proportion of Museums which provide digital educational content or online events (38 per cent in 2017 vs 13 per cent in 2013).

Figure 2: Digital activities for Museums vs whole sector 2017 (and change from 2013)



Now thinking about your organisation's digital activities, please indicate which of the following your organisation currently does. Statistically significant changes 2013-2017 (at a 95 per cent confidence level) highlighted in bold. Arrows show statistically significant differences vs whole sector.

2017: Museums n=211, Whole sector n = 1,424; 2013: Museums n=118.

With regards to mobile, Museums are slightly behind the sector as a whole, with 64 per cent having a mobile-optimised web presence compared to 69 per cent for the whole sector, although this is not a significant difference. This proportion has increased significantly, from 29 per cent in 2013.[7] As over 60 per cent of UK online time (for consumers generally) is now spent on mobile, Museums who are not yet optimised for mobile should recognise this as a priority.[8]

Museums tend to use fewer social media platforms than the sector as a whole (averaging 3.2 compared to 4.2 across the whole sector). Facebook use is comparable with the sector (88 per cent vs 92 per cent), but significantly fewer Museums tend to use Twitter (74 per cent vs 85 per cent), YouTube (36 per cent vs 50 per cent) and Instagram (35 per cent vs 48 per cent).[9]

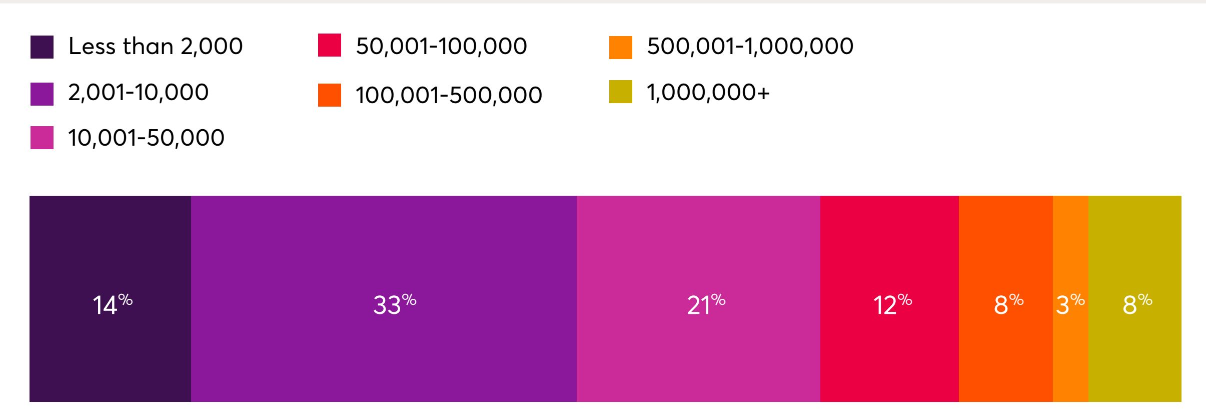
Museums are similar to the sector average in terms of the proportion of organisations which claim that they are doing data-driven activities. The only exception being that a significantly lower proportion use audience/visitor contact details to send out newsletters (66 per cent vs 74 per cent). The majority of data-driven activities have remained stable since 2013, though there has been a significant decline in Museums using data to inform the broader strategic direction of their organisation (43 per cent vs 57 per cent in 2013).[10]

Digitising physical collections

Overall, 38 per cent of organisations across the arts and culture sector say they have a physical collection. Unsurprisingly, this is much higher among the Museums sector, where 95 per cent have a physical collection.[11]

Among Museums, 47 per cent have a small collection (defined by holding fewer than 10,000 items) and 8 per cent have over a million objects in their collection. Sixty-three per cent of small Museums (defined by turnover) have a small collection of under 10,000 items, whilst 32 per cent of large Museums have over one-million items in their collection.[12] For context, the British Museum has over eight million objects in its collection.[13]

Figure 3: Size of collection among Museums with a physical collection, 2017 only

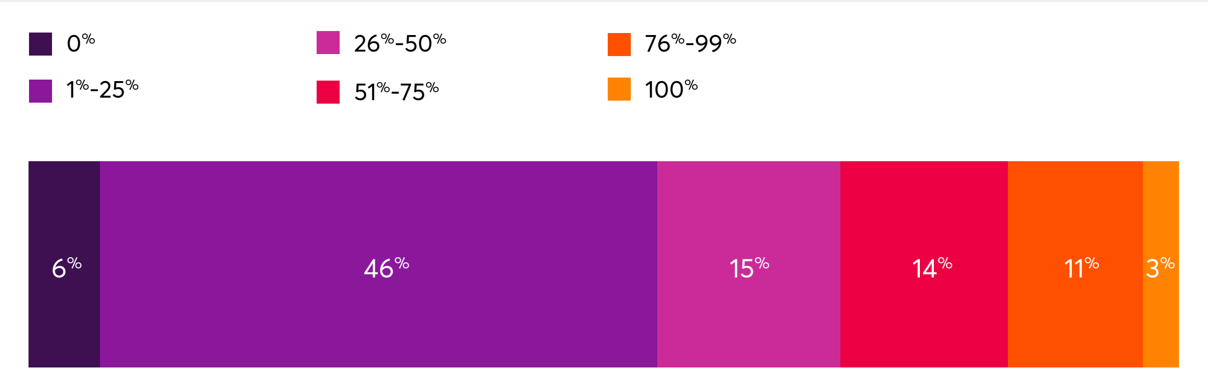


If your organisation has a physical collection, how many objects or artworks do you hold in total?

Base: 2017 - Museum orgs with a physical collection (n = 230).

Sixty-one per cent of Museums have digitised up to 50 per cent of their collection, with 6 per cent reporting to have not digitised any of it. Small Museums are most likely to report not having begun digitisation (10 per cent have not). All large Museum respondents have begun the process of digitisation, with 75 per cent reporting that they've digitised up to half their collection.

Figure 4: Current progress of digitising collections among museums with a physical collection, 2017

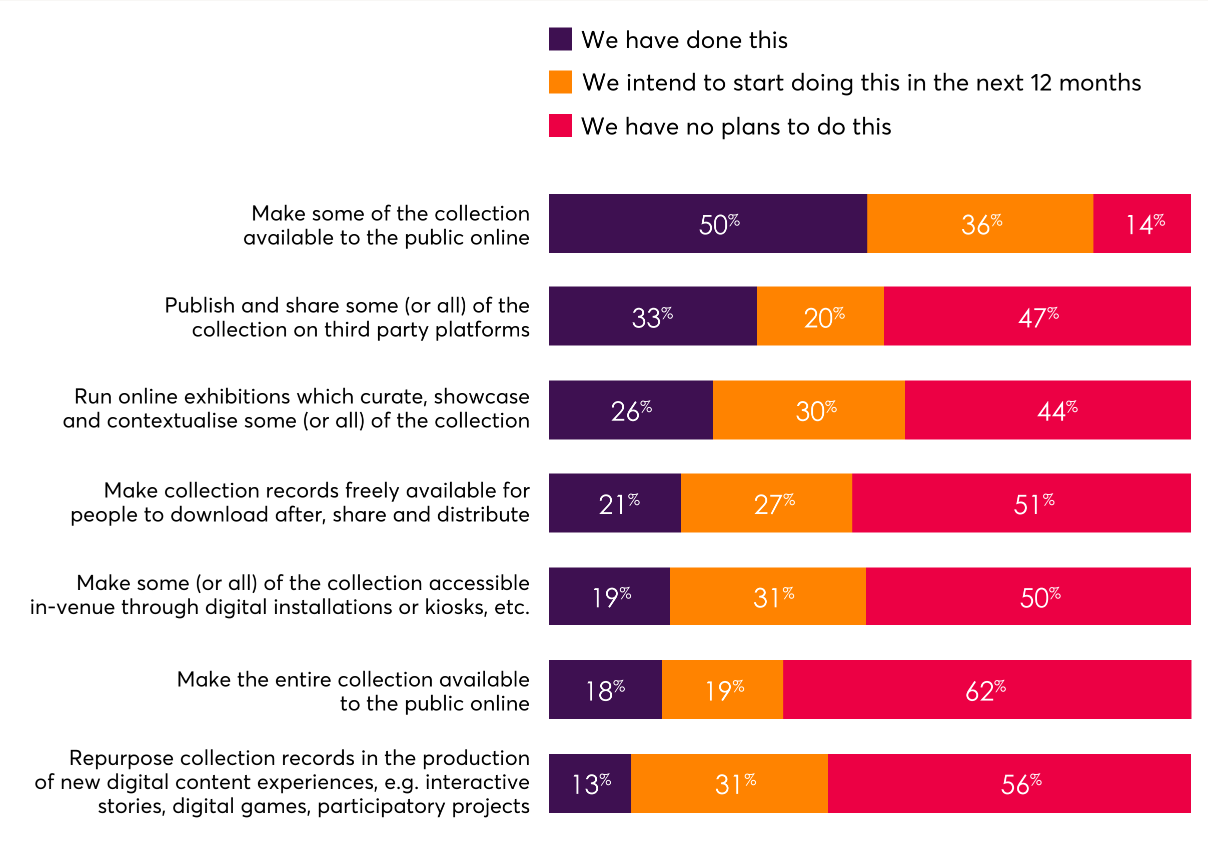


Roughly how many objects have been digitised?

Base: 2017 – museums who have a digital collection (n = 189).

Half of Museums with a digitised collection say they have made some of it available to the public online, whilst 36 per cent said they intend to do so over the next 12 months (Figure 5). However, 56 per cent of Museums say they do not expect to make their entire collection available online and 14 per cent say they have no plans to make some of their collection available to the public online.[14]

Figure 5: Take-up of different activities associated with digitised collections among Museums with collections



Which of the following activities are you currently doing with your digitised collection, or do you plan to do in the next 12 months?

Base: 2017 – museums which have digitised some of their physical collection (n = 166).

Museums are opening up their collections in many different ways. One-third have already published and shared their collections on third party platforms and a further 20 per cent say they intend to do so. Eighteen per cent report they have already made part of their collection available to download and share, so that it can be distributed beyond platforms controlled by them.

The survey shows that around a fifth to a quarter of Museums are creating new content experiences that go beyond just digitising a collection – 21 per cent of those with a digital collection say they had already run online exhibitions that showcase, curate and contextualise some of their collection, 26 per cent had already made part of their collection available in venue (e.g. through kiosks), whilst 19 per cent say they had repurposed collection records in the production of new digital content experiences, such as interactive stories or digital games.[15]

Unsurprisingly, large Museums are more likely to have started all of the different behaviours related to digitising collections compared to small Museums. For example, 79 per cent of large Museums report that they've made some of their collection available online, versus 38 per cent of small Museums; 52 per cent of large Museums have published some of their collection on third party platforms, versus 23 per cent of small Museums and 41 per cent of large Museums have run online exhibitions which showcase or contextualise their collections, versus 14 per cent of small Museums.[16]

The impact of digital

Proportion seeing major/ fairly major impacts overall	62 per cent (vs. 70 per cent for the whole sector)
Main area of impact	Boosting our public profile

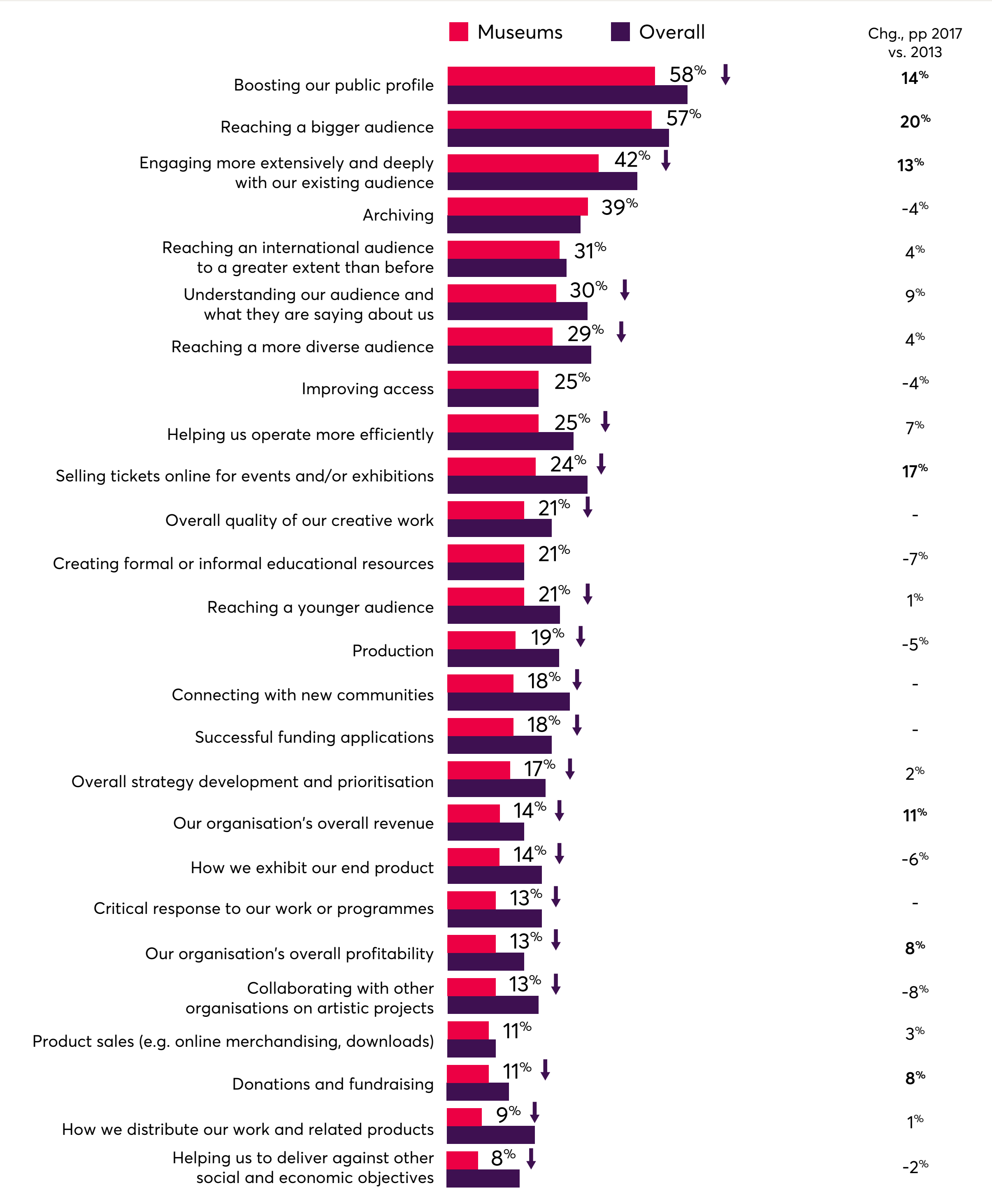
A significantly lower proportion of Museums report that digital has had a positive impact on achieving their organisation's overall mission, compared to the wider arts and culture sector (62 per cent vs 70 per cent for the whole sector). When comparing small Museums with similarly sized organisations the differential is greater, with 54 per cent of small Museums reporting positive impact from digital, compared to 67 per cent of small organisations across the sector. On the other hand, large Museums report similar levels of impact to large organisations in the wider sector (76 per cent vs 80 per cent in the sector as a whole).[17]

Fewer Museums report major impact from digital in 19 of the 26 business areas tracked. The largest differences are experienced across selling tickets online, how they distribute their work and connecting with new communities (see Figure 3).

Since 2013, significantly more Museums report impact across eight activity areas examined in the Digital Culture survey. These are mostly audience focused (reaching a bigger audience, boosting our public profile and engaging more extensively and deeply with our existing audience), or related to business models (selling tickets online, overall profitability, overall revenue, and donations and fundraising). There has been one significant decline since 2013, with fewer Museums reporting a major positive impact for collaborating digitally with other organisations.[18]

Large Museums consistently report a greater impact from digital across activity areas with the exception of archiving, compared to small and medium-sized Museums.

Figure 6: The impact of digital technology on business areas (Museums vs. whole sector, 2017)



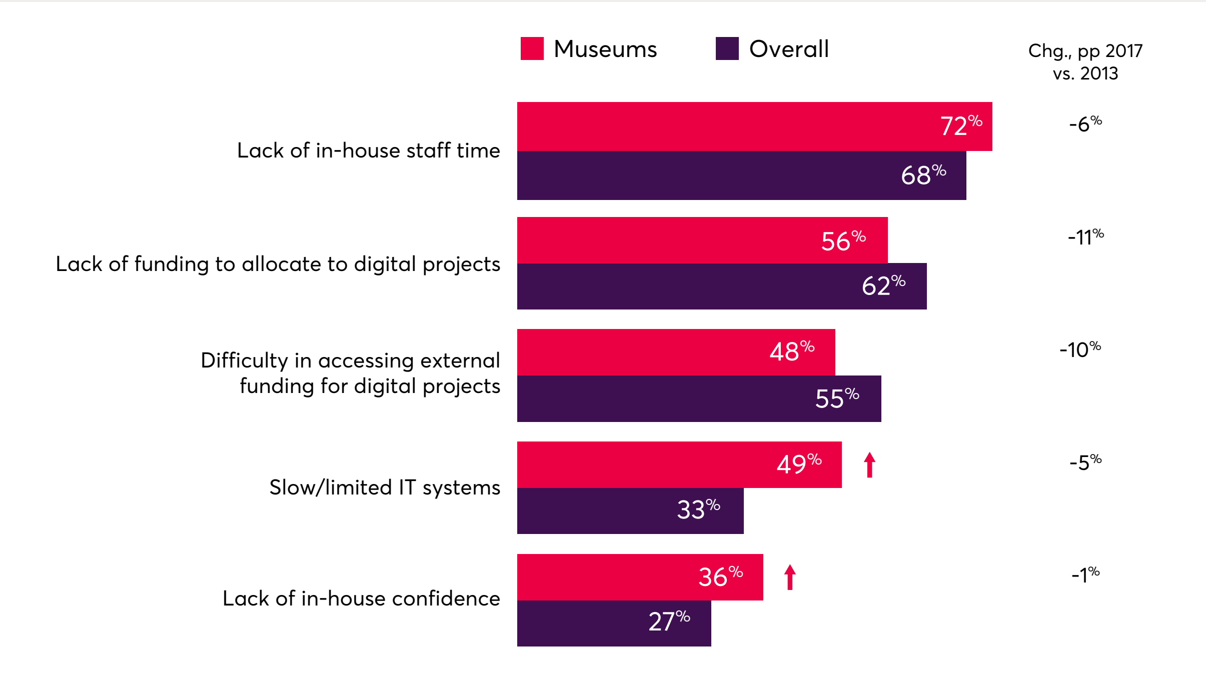
Thinking back over the past 12 months, would you say your organisation's use of the internet and digital technology has had a major positive impact, a minor positive impact, or no positive impact at all on each of the following? Statistically significant changes 2013-2017 (at a 95 per cent confidence level) highlighted in bold. Arrows show statistically significant differences vs whole sector.

2017: Museums n=182, Whole sector n=1,239; 2013: Museums n=118.

Management factors

In line with the wider sector, Museums report the most significant barriers to realising their digital ambitions are a lack of time and funding. Museums also report that slow/limited IT systems and a lack of confidence are frequently experienced as barriers, significantly more so than the sector as a whole. Since 2013, there is a general trend of barriers declining, with significantly fewer Museums reporting a lack of control over IT systems (24 per cent vs 38 per cent in 2013), digital not valued in their organisation (10 per cent vs 21 per cent in 2013) and a lack of understanding of what digital can do (24 per cent vs 36 per cent in 2013) as barriers. Museums are also slightly less likely than the wider sector to say that funding is a barrier (although this is not statistically significant), with around 10 per cent fewer now saying that this is a barrier compared to 2013.[19]

Figure 7: Top 5 Barriers felt by Museums (Museums vs. whole sector, 2017)

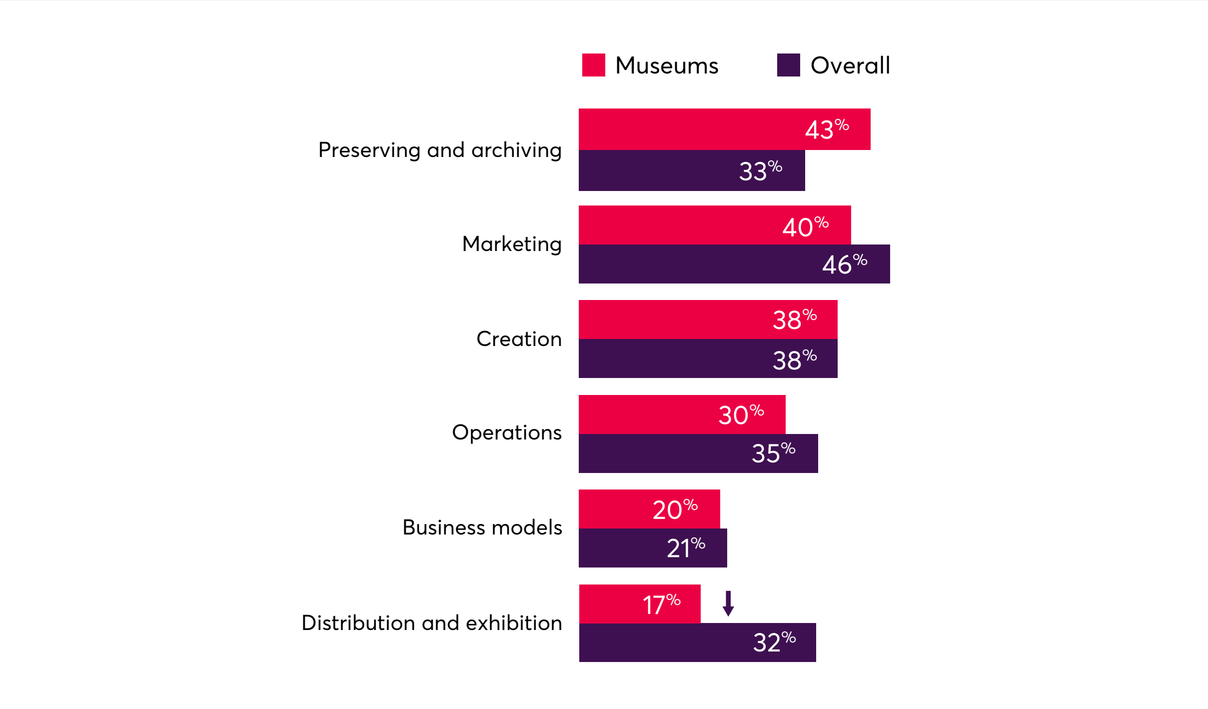


To what extent do you see each of the following as barriers to achieving your organisation's aspirations for digital technology?

Arrows show statistically significant differences vs whole sector.2017: Museums n=175, Whole sector n=1,200; 2013: Museums n=117

In terms of their digital skills profile, more Museums report having advanced skills in comparison to their peers across preserving and archiving, and unlike the whole sector, recognise this as the skills area where they feel comparatively most advanced. However, fewer Museums report having above average skills compared to the whole sector for distribution and exhibition (17 per cent vs 32 per cent) making this the area where fewest Museums report having above average skill levels.[20]

Figure 8: Proportion that report their organisation to have above average digital skills – 6-10 out of 10 - compared to their peers (Museums vs. whole sector, 2017)



For each of the following areas, how advanced do you feel your organisation's digital skill levels are compared to your peers? Arrows show statistically significant differences vs whole sector.

2017: Museums n=172, Whole sector n=1,187.

Mirroring the skill activities in which Museums report having above average skills, the one skill area that more Museums report being well-served in, compared to the rest of the sector is digital archiving. Fifty-three per cent of Museums report being well-served compared to 38 per cent of the sector as a whole. However, fewer Museums report being well-served for digital production compared to the whole sector (36 per cent vs 48 per cent sector average).

There have been no significant movements in the number of Museums who feel well-served across skill levels, since 2013.[21]

Endnotes

1. 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.
2. 2017: Museums under £100,000 n = 90, Museums £100k – £499,999 n = 42, Museums £500k+ n = 50; 2013: Museums under £100,000 n = 36, Museums £100k – £499,999 n = 29, Museums £500k+ n = 37.
3. Between 2013 and 2014 we changed the description of business models; specifically, one of the examples we gave changed from 'syndicating digital content to a third-party ad-funded site' to 'allowing online donations through your organisation's website'. 2017: Museums n = 205, 2013: Museums n = 118.
4. 2017: Museums under £100,000 n = 90, Museums £100k – £499,999 n = 42, Museums £500k+ n = 50; 2013: Museums under £100,000 n = 36, Museums £100k – £499,999 n = 29, Museums £500k+ n = 37.
5. 2017: Museums under £100,000 n = 90, Museums £100k – £499,999 n = 43, Museums £500k+ n = 52.
6. 2017: museums n = 211, 2013: museums n = 118.
7. 2017: Whole sector n = 1,245, Museums n = 184, 2013: Museums n = 118.
8. ComScore MMX Multi-Platform, January 2017.
9. 2017: Whole sector n = 1,291, Museums n = 188.
10. 2017: Whole sector n = 1,298, Museums n = 188, 2013: Museums n = 117.
11. Base: 2017 – all respondents n = 1,348, Museums n = 200.
12. 2017: Museums n = 230, Museums under £100,000 n = 101, Museums £100k – £499,999 n = 56, Museums £500k+ n = 50.
13. http://www.britishmuseum.org/about_us/the_museums_story/the_collection.aspx
14. 2017: museums with a physical collection n = 189.
15. 2017: museums who have started digitising their physical collection n = 166.
16. 2017: Museums under £100,000 n = 71, Museums £500k+ n = 40.
17. 2017: Museums n =180, Museums under £100,000 n = 71, Museums £100k – £499,999 n = 40, Museums £500k+ n = 46.
18. 2017: museums n = 118, 2017: whole sector n = 1,239, museums = 182.
19. 2017: Museums n = 175, Whole sector n = 1,200.
20. 2017: Museums n = 172, Whole sector n = 1,187.
21. 2017: Museums n = 174, Whole sector n = 1,193, 2013: Museums n = 118.

Learn more about the 2017 Digital Culture survey findings

For a better understanding of how Museums and other organisations are using digital, you can access the Digital Culture data portal and explore the full set of data yourself.

Supported using public funding by
ARTS COUNCIL ENGLAND

Arts Council England champions, develops and invests in artistic and cultural experiences that enrich people's lives. We support a range of activities across the arts, museums and libraries – from theatre to digital art, reading to dance, music to literature, and crafts to collections.

Great art and culture inspires us, brings us together and teaches us about ourselves and the world around us. In short, it makes life better. Between 2015 and 2018, we plan to invest £1.1 billion of public money from government and an estimated £700 million from the National Lottery to help create these experiences for as many people as possible across the country.

www.artscouncil.org.uk

Nesta is a global innovation foundation. We back new ideas to tackle the big challenges of our time. We use our knowledge, networks, funding and skills - working in partnership with others, including governments, businesses and charities. We are a UK charity but work all over the world, supported by a financial endowment.

Nesta, 58 Victoria Embankment, London EC4Y 0DS
+44 (0)20 7438 2500 | information@nesta.org.uk
@nesta_uk www.facebook.com/nesta.uk
www.nesta.org.uk