Music

Two hundred and three Music 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 Music sector is using technology to support its work.[1]

Importance of digital technology

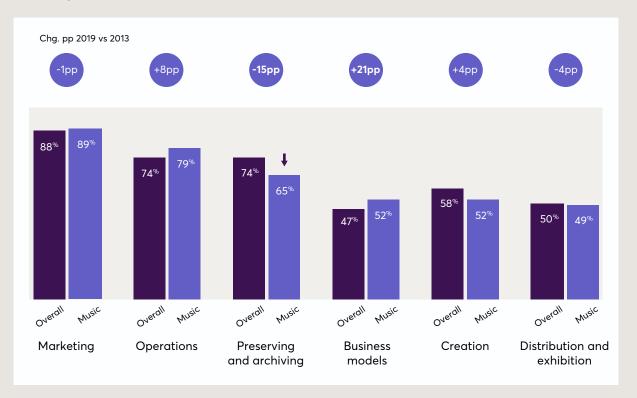| Most important for	➡	Marketing
Least important for	➡	Distribution and exhibition

The business area where the highest proportion of Music organisations perceive digital technology to be essential/important is marketing (89 per cent of Music organisations, versus the whole sector average of 88 per cent). Music organisations are more likely than the overall sector to say digital technology is essential/important in two business areas: operations (79 per cent vs 74 per cent amongst the sector overall) and business models (52 per cent vs 47 per cent). They are less likely than the overall sector to say digital technology is essential/important for preserving and archiving (65 per cent vs 74 per cent of the overall sector). Fewer Music organisations also report that digital technology is essential/important for creation (52 per cent amongst Music organisations vs 58 per cent for the overall sector).[2] However, the difference compared to the whole sector has fallen since 2013 from 16 percentage points to just 6. Another area where Music organisations are now more in line with the sector overall is distribution and exhibition (49 per cent for Music in 2019 vs 50 per cent for sector overall), where the differential has fallen from 9 percentage points in 2013 to just 1 now.[3]

nesta

ARTS COUNCIL ENGLAND

Reflecting the sector overall, the proportion of Music organisations that perceive digital technology to be essential/important for business models has risen significantly since 2013, from 31 per cent in 2013 to 52 per cent in 2019. In contrast, the proportion attributing importance to preserving and archiving has fallen significantly (80 per cent in 2013 vs 65 per cent in 2019).[4]

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

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

Base: 2019 – all respondents (n = 1,113), 2019 – Music organisations (n = 199); 2013 – Music organisations (n = 121).
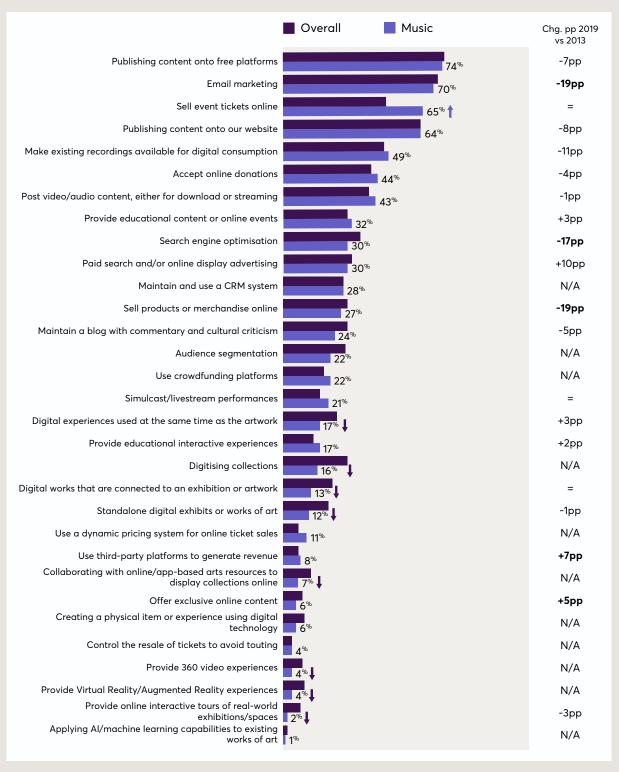
Digital activities

Top digital activities	➡	Publishing content on free platforms, email marketing and selling event tickets online
More likely than other other artforms to do…	➡	Sell event tickets online, digitise collections or have digital works that are connected to an exhibition or artwork

Music organisations on average do a similar number of digital activity types as the sector as a whole, with an average of 7.8 activity types versus 8.2 for the overall sector.[5] The activity type where there is the largest gap between Music organisations and the sector overall is for selling event tickets online; 65 per cent of Music organisations report doing this compared to 48 per cent of the overall sector. Compared to the overall sector, Music organisations are less likely to digitise collections (16 per cent vs 30 per cent) or to create digital works that are connected to an exhibition or artwork (13 per cent vs 23 per cent).[6]

Music organisations engage in fewer digital activity types than in 2013, with the average number falling from 8.9 in 2013 to 7.8 in 2019. There have been notable decreases in the following areas: email marketing (89 per cent in 2013 vs 70 per cent in 2019), selling products or merchandise online (46 per cent in 2013 vs 27 per cent in 2019), and search engine optimisation (47 per cent in 2013 vs 30 per cent in 2019). The most notable increases since 2013 are for paid search and/or online display advertising (20 per cent in 2013 vs 30 per cent in 2019) and use third-party platforms to generate revenue (1 per cent in 2013 vs 8 per cent in 2019).[7]

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

Activity	Overall	Music	Chg. pp 2019 vs 2013
Publishing content onto free platforms		74%	-7pp
Email marketing		70%	**-19pp**
Sell event tickets online		65% ↑	=
Publishing content onto our website		64%	-8pp
Make existing recordings available for digital consumption		49%	-11pp
Accept online donations		44%	-4pp
Post video/audio content, either for download or streaming		43%	-1pp
Provide educational content or online events		32%	+3pp
Search engine optimisation		30%	**-17pp**
Paid search and/or online display advertising		30%	+10pp
Maintain and use a CRM system		28%	N/A
Sell products or merchandise online		27%	**-19pp**
Maintain a blog with commentary and cultural criticism		24%	-5pp
Audience segmentation		22%	N/A
Use crowdfunding platforms		22%	N/A
Simulcast/livestream performances		21%	=
Digital experiences used at the same time as the artwork		17% ↓	+3pp
Provide educational interactive experiences		17%	+2pp
Digitising collections		16% ↓	N/A
Digital works that are connected to an exhibition or artwork		13% ↓	=
Standalone digital exhibits or works of art		12% ↓	-1pp
Use a dynamic pricing system for online ticket sales		11%	N/A
Use third-party platforms to generate revenue		8%	**+7pp**
Collaborating with online/app-based arts resources to display collections online		7% ↓	N/A
Offer exclusive online content		6%	**+5pp**
Creating a physical item or experience using digital technology		6%	N/A
Control the resale of tickets to avoid touting		4%	N/A
Provide 360 video experiences		4% ↓	N/A
Provide Virtual Reality/Augmented Reality experiences		4% ↓	N/A
Provide online interactive tours of real-world exhibitions/spaces		2% ↓	-3pp
Applying AI/machine learning capabilities to existing works of art		1%	N/A

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 when question was not asked in 2013.

Base: 2019 – all respondents (n = 1,134), 2019 – Music organisations (n = 203), 2013 – Music organisations (n = 121).

A similar proportion of Music organisations report having a mobile-optimised web presence compared to the sector overall, and both have seen a large increase since 2013 (from 27 per cent of Music organisations in 2013 to 70 per cent in 2019, and 33 per cent for the sector in 2013 to 73 per cent in 2019).[8]

With regards to social media, the average number of platforms used by Music organisations is close to the sector overall (4.1 vs 4.2 sector average). Of the fifteen social media platforms listed in the survey, those most widely used by Music organisations are Facebook (90 per cent vs 92 per cent of the overall sector) and Twitter (82 per cent vs 83 per cent). Since 2013, the platform that has seen the greatest rate of uptake amongst Music organisations is Instagram, rising from 13 per cent in 2013 to 49 per cent in 2019.[9]

In 2019, Music organisations and the sector both engage in four data-led activities on average. The only data-led activity that Music organisations are notably more likely to do than the sector overall is to use data to administer and improve membership schemes (26 per cent of Music organisations do this vs 18 per cent of the sector overall).

Since the Digital Culture survey began, there have been no increases among Music organisations in the prevalence of any of the fifteen data-led activity types tested.[10] In fact, the use of most data-led activity types has declined since 2013. Most notably, use of data to identify and engage with our most valuable audience members, visitors and supporters has fallen from 50 per cent in 2013 to 37 per cent in 2019.

The positive impact of digital

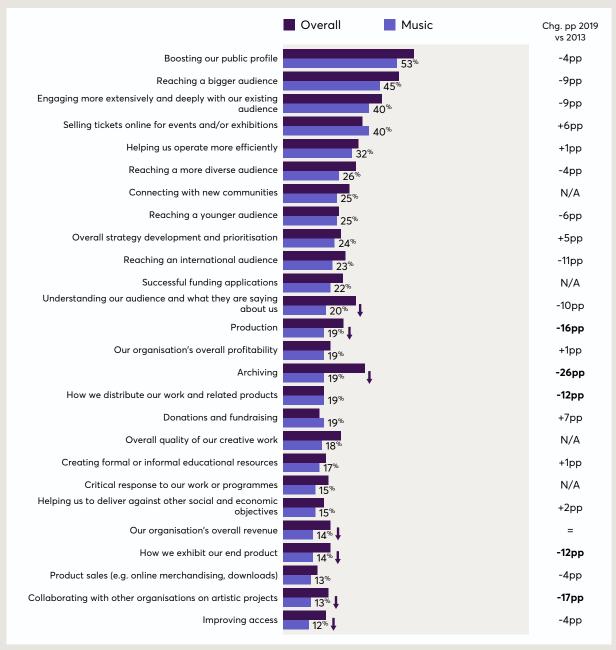|		
Proportion seeing major/fairly major positive impacts overall	➡	60 per cent (vs 67 per cent for the whole sector)
Main area of positive impact	➡	Boosting public profile

In the Digital Culture survey, organisations are asked how great an impact digital technology is having on their organisation's ability to fulfil its mission successfully. In 2019, 60 per cent of Music organisations reported that digital technology had a major or fairly major positive impact (scoring four or five on a five-point scale) on their ability to carry out their mission effectively. This is lower than the sector overall (67 per cent) and represents a 13 percentage point decrease for Music organisations since 2014 (73 per cent) when the question was first asked.[11]

The survey also asks about the impact that digital technology is having across a list of twenty-six different business areas. Compared to the wider sector, proportionately fewer Music organisations report a major positive impact in twenty-three out of the twenty-six areas asked about (see Figure 3). The largest differences between Music organisations and the sector overall are for understanding our audience and what they are saying about us (20 per cent of Music organisations report a major positive impact on this area vs 34 per cent for the sector overall) and archiving (19 per cent vs 38 per cent).[12] Figure 3 shows that there are six other areas in which significantly fewer Music organisations report major positive impact compared to the sector overall.

There are a number of areas in which the number of Music organisations reporting major positive impact has decreased since 2013, most notably archiving (which has declined from 45 per cent in 2013 to 19 per cent in 2019) and collaborating with other organisations on artistic projects (30 per cent in 2013 vs 13 per cent in 2019).

For Music, the most notable increases since 2013 among the twenty-six impact areas are donations and fundraising, where the proportion reporting major positive impact has risen from 12 per cent in 2013 to 19 per cent in 2019), selling tickets online (34 per cent in 2013 vs 40 per cent in 2019) and overall strategy development and prioritisation (19 per cent in 2013 vs 24 per cent in 2019).[13]

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

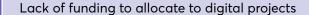| Business area	Overall / Music	Chg. pp 2019 vs 2013
Boosting our public profile	53%	-4pp
Reaching a bigger audience	45%	-9pp
Engaging more extensively and deeply with our existing audience	40%	-9pp
Selling tickets online for events and/or exhibitions	40%	+6pp
Helping us operate more efficiently	32%	+1pp
Reaching a more diverse audience	26%	-4pp
Connecting with new communities	25%	N/A
Reaching a younger audience	25%	-6pp
Overall strategy development and prioritisation	24%	+5pp
Reaching an international audience	23%	-11pp
Successful funding applications	22%	N/A
Understanding our audience and what they are saying about us	20% ↓	-10pp
Production	19% ↓	**-16pp**
Our organisation's overall profitability	19%	+1pp
Archiving	19% ↓	**-26pp**
How we distribute our work and related products	19%	**-12pp**
Donations and fundraising	19%	+7pp
Overall quality of our creative work	18%	N/A
Creating formal or informal educational resources	17%	+1pp
Critical response to our work or programmes	15%	N/A
Helping us to deliver against other social and economic objectives	15%	+2pp
Our organisation's overall revenue	14% ↓	=
How we exhibit our end product	14% ↓	**-12pp**
Product sales (e.g. online merchandising, downloads)	13%	-4pp
Collaborating with other organisations on artistic projects	13% ↓	**-17pp**
Improving access	12% ↓	-4pp

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

Base: 2019 – all respondents (n = 997), 2019 – Music organisations (n = 180); 2013 – Music organisations (n = 121).

Management factors

Biggest barrier ➜	Lack of funding to allocate to digital projects

In line with the sector overall, Music organisations report lack of funding and lack of in-house staff time as the top two barriers to them achieving their digital aspirations. However, Music organisations are less likely than the sector overall to cite these as barriers: 60 per cent of Music organisations cite lack of funding versus 70 per cent of the sector; and 60 per cent of Music organisations cite lack of in-house staff time versus 68 per cent of the sector.[14]

Music organisations are less likely than the sector overall to perceive barriers; the proportion for Music is lower compared to the overall sector for thirteen of the fifteen barriers listed. In addition to lack of funding (60 per cent vs 70 per cent) the biggest difference is for lack of expert advice (25 per cent vs 35 per cent).

However, compared to 2013, Music organisations are notably more likely to report the following as barriers: no senior manager with a digital remit (21 per cent in 2013 and 32 per cent in 2019) and lack of control over our IT systems/infrastructure (8 per cent in 2013 and 19 per cent in 2019).[15]

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

Barrier	Chg. pp 2019 vs 2013
Lack of funding to allocate to digital projects — 60% ↓	+3pp
Lack of in-house staff time — 60%	+6pp
Difficulty in accessing external funding for digital projects — 49%	=
No senior manager with a digital remit — 32%	+11pp
Lack of in-house skills/knowledge — 30%	=
Slow/limited IT systems or networks — 26%	+9pp
Lack of expert advice — 25% ↓	+2pp
Lack of in-house confidence — 24%	+3pp
Lack of suitable external suppliers/freelance staff — 24%	+6pp
Change of regulations, e.g. introduction of GDPR — 22%	N/A
Lack of understanding of how to budget for and commission digital projects — 22%	N/A
Lack of strategy/planning — 19%	+7pp
Lack of control over our IT systems/infrastructure — 19%	**+11pp**
Lack of understanding of what digital technology can do — 17%	=
Digital not valued in the organisation — 8%	-1pp

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 when question was not asked in 2013.

Base: 2019 – all respondents (n = 976), 2019 – Music organisations (n = 175); 2013 – Music organisations (n = 121).

In terms of digital skills levels, when compared to the sector overall, Music organisations are more likely to consider themselves to have advanced skills in relation to operations (39 per cent vs 32 per cent) and business models (20 per cent vs 16 per cent) (see Figure 5). On the other hand, only 25 per cent of Music organisations report having advanced digital skills in creation compared to 32 per cent of the sector overall.[16]

Compared to 2017 (when this question was first asked), fewer Music organisations report having advanced digital skills across four out of the six areas listed. This is slightly more positive than for the sector overall, where a proportional decline in advanced digital skills has been reported across all six areas. The largest decrease reported by Music organisations is for creation (32 per cent in 2017 vs 25 per cent in 2019).[17]

Figure 5: Proportion that report their organisation to have advanced digital skills (six–ten out of ten) compared to their peers (Music vs whole sector, 2019)

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.

Base: 2019 – all respondents (n = 965), 2019 – Music organisations (n = 173).

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 in each area. This takes account of external options as well as internal resources; feeling 'well-served' may involve having sufficient in-house skills or could be achieved through accessing skills or expertise externally.

In common with the sector overall, the two skills areas where most Music organisations feel well-served for their needs are digital marketing (65 per cent vs 66 per cent of overall sector) and multimedia/website design (47 per cent vs 51 per cent). However, since 2013 the proportion of Music organisations who report feeling well-served for their needs has decreased in both of these areas (from 67 per cent in 2013 to 65 per cent in 2019 for digital marketing and from 72 per cent in 2013 to 47 per cent in 2019 for multimedia website design).[18]

Endnotes

1. Please note, our sample size of Music organisations (n = 203), allows for a margin of error of +/- 7 per cent at a 95 per cent confidence level. Please see the main report for details of our calculations of statistical significance.

2. Q10. How important is digital technology to your organisation overall, at the present time, in each of the following areas? Base: 2019 – Music organisations (n = 199), all organisations – 2019 (n = 1,113).

3. Q10. Base: 2013 – Music organisations (n = 121), 2019 – Music organisations (n = 199); all organisations – 2019 (n = 1,113), all organisations – 2013 (n = 891).

4. Q10. Base: 2013 – Music organisations (n = 121), 2019 – Music organisations (n = 199).

5. Q12. Now thinking about your organisation's digital activities, please indicate which of the following your organisation currently does. Base: 2019 – Music organisations (n = 203), 2019 – whole sector (n=1,134)

6. Q12. Base: 2019 – all respondents (n = 1,134), 2019 – Music organisations (n = 203).

7. Q12. Base: 2013 – Music organisations (n = 121), 2019 – Music organisations (n = 203).

8. Q23. Does your organisation currently have a web presence that is optimised for mobile devices? Base: 2013 – Music organisations (n = 121), 2019 – Music organisations (n = 181); 2013 – all organisations (n = 887), 2019 – all organisations (n = 1,003).

9. Q18. On which, if any, of the following social networks/websites does your organisation currently have a regularly active profile? Base: 2019 – all respondents (n = 1,029), 2019 – Music organisations (n = 188); 2017 – Music organisations (n = 211).

10. 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 do you do? Base: 2019 – Music organisations (n = 188), 2013 – Music organisations (n = 120).

11. Q35. Overall, how great an impact do you feel digital technology has had on your organisation's ability to fulfil its mission effectively? Answer scale: five-point scale from no impact at all (1) to major impact (5). Base: 2019 – all respondents (n = 994), 2019 – Music organisations (n = 180); 2014 – Music organisations (n = 132).

12. Q28. Thinking back over the past twelve months, would you say your organisation's use of the internet and digital technology has had a major positive impact, a minor positive impact, or no positive impact at all on each of the following? Answer scale: three-point scale from no positive impact at all (1) to major positive impact (3). Base: 2019 – all respondents (n = 997), 2019 – Music organisations (n = 180).

13. Q28. Base: Music organisations in the following years: 2013 (n = 121), 2019 (n = 180).

14. Q37. To what extent do you see each of the following as barriers to achieving your organisation's aspirations for digital technology? Base: Music organisations in the following years: 2013 (n = 121), 2019 (n = 175).

15. Q37. Base: Music organisations in the following years: 2013 (n = 121), 2019 (n = 175).

16. 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 – Music organisations (n = 173).

17. Q67. Base: Music organisations in the following years: 2017 (n = 196), 2019 (n = 173).

18. 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 respondents (n = 969), 2019 – Music organisations (n = 174); 2013 – Music organisations (n = 121).

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.

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.

Between 2018 and 2022, we will invest £1.45 billion of public money from government and an estimated £860 million from the National Lottery to help create these experiences for as many people as possible across the country.
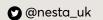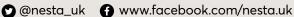
nesta

Nesta is an innovation foundation. For us, innovation means turning bold ideas into reality and changing lives for the better.

We use our expertise, skills and funding in areas where there are big challenges facing society.

Nesta is based in the UK and supported by a financial endowment. We work with partners around the globe to bring bold ideas to life to change the world for good.