Combined Arts

One hundred and seventy Combined Arts organisations 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 Combined Arts sector is using technology to support its work.

Importance of digital technology

Most important for	Marketing, preserving and archiving, operations
Least important for	Business models

Looking across different organisational functions, Combined Arts organisations are very much in line with the wider arts and cultural sector (see Figure 1). Over three-quarters say digital technology is important for their marketing (90 per cent), for preserving and archiving and for operations (both 76 per cent).

Since 2013, the number of Combined Arts organisations that say digital technology is important for creation and for marketing has dropped significantly.

Mirroring the wider sector, Combined Arts organisations have seen an increase in the number of organisations reporting that digital technology is important for business models.[1] However, the increase is not statistically significant and has resulted in Combined Arts now being slightly behind the sector as a whole (50 per cent vs 53 per cent).

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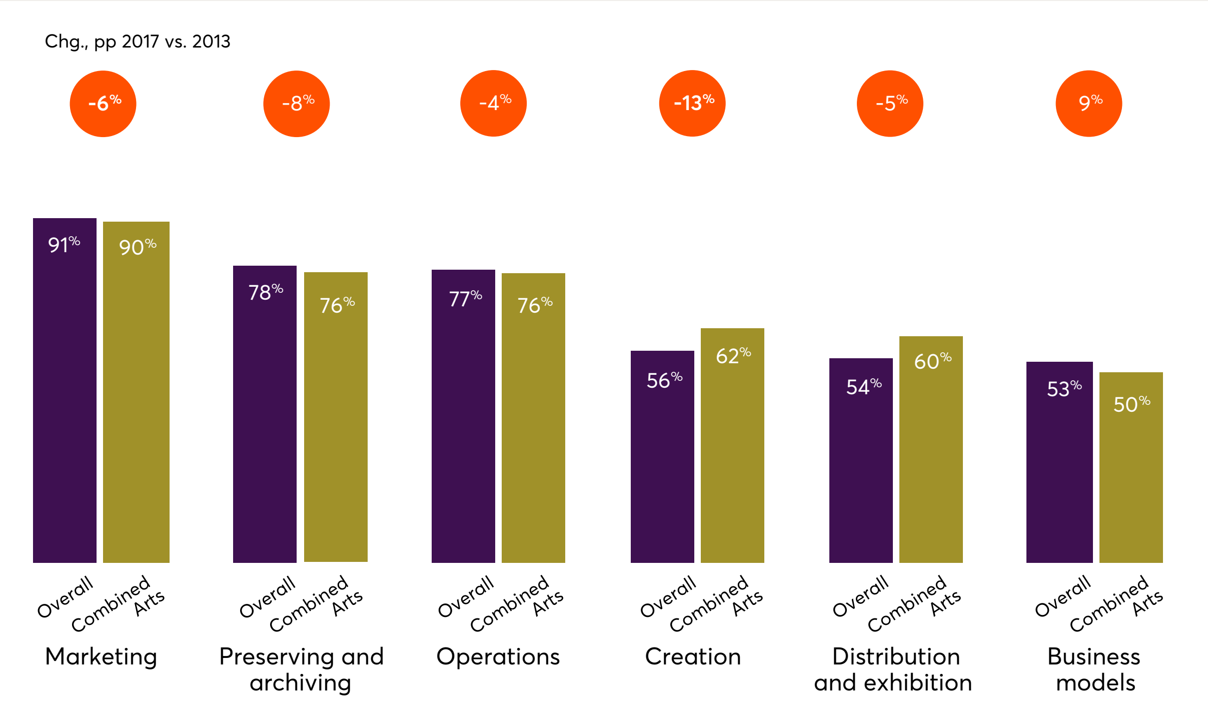
Figure 1: Importance of digital technology to different activity areas (whole sector vs. Combined Arts, 2017)



How important is digital technology to your organisation overall, at the present time, in each of the following areas? Statistically significant changes 2013-2017 (at a 95 per cent confidence level) highlighted in bold. Arrows show statistically significant differences vs whole sector (no significant differences for Combined Arts).

2017: Combined Arts n=170, Overall n=1,391, 2013: Combined Arts n=99.

In terms of scale of organisation (based on turnover),[2] across all organisational functions, large Combined Arts organisations report significantly higher importance levels compared to small Combined Arts organisations, except for preserving and archiving. For example, 90 per cent of large Combined Arts organisations report that digital is important to operations, compared to 73 per cent of small Combined Arts organisations, whilst 70 per cent of large organisations report digital is important to creation, compared to 55 per cent of small Combined Arts organisations. On the other hand, 72 per cent of large Combined Arts organisations report that digital is important to preserving and archiving, compared to 78 per cent of small Combined Arts organisations.

Digital activities

Top digital activities	Email marketing, and publishing content on free platforms and on our own website
More likely than other artforms to…	Publish content onto free platforms, use crowdfunding platforms

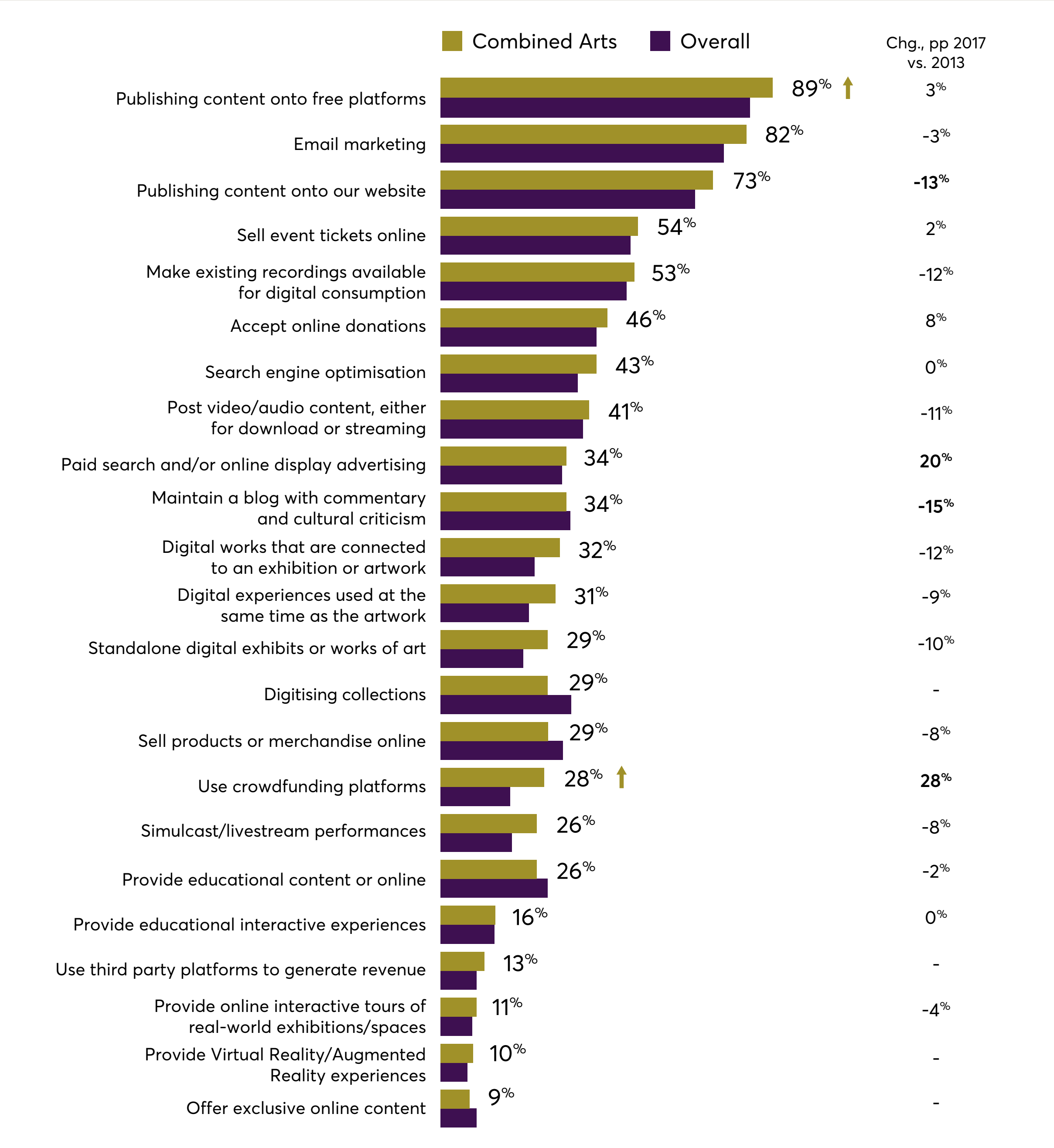
Combined Arts organisations are engaging in a wider range of digital activities than the sector as a whole. On average, they do 8.4 types of digital activity, compared to 7.8 for the whole sector.[3] The number of activities varies by organisation size, with large Combined Arts organisations being the most digitally diverse (11.2 different types of activity), whereas medium-sized Combined Arts organisations do 8.7 different types of digital activity, and this drops down to 7.5 for small organisations.[4]

Overall, Combined Arts organisations mirror the wider sector in terms of their digital activities in all but two areas. They are significantly more likely than the sector as a whole to publish content onto free platforms and to use crowdfunding (see Figure 2).

In comparison to 2013, significantly fewer Combined Arts organisations publish content onto their own website or maintain a blog.

Similar to the wider sector, Combined Arts organisations have seen a surge in the number of organisations engaging in both crowdfunding and paid search or online display advertising.[5]

Figure 2: Digital activities for Combined Arts organisations vs the overall 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: Combined Arts n=171, Whole sector n = 1,424; 2013: Combined Arts n=99.

In line with the sector as a whole, many more Combined Arts organisations have optimised their web presence for mobile, with 70 per cent of Combined Arts organisations (vs 69 per cent for the sector) now having a mobile-optimised web presence compared to only 44 per cent in 2013.[6] Sixty per cent of UK online time (for consumers generally) is now spent on mobile which means organisations that are not optimised for mobile should consider this as a priority.

Combined Arts organisations favour the same social media platforms as the wider arts and cultural sector, with the most popular social platforms being Facebook (94 per cent), Twitter (87 per cent) and YouTube (55 per cent). LinkedIn is the only platform that significantly more Combined Arts organisations use than the sector as a whole (36 per cent vs. 28 per cent).[7]

In line with the wider sector, more Combined Arts organisations are now using Instagram (52 per cent vs. 19 per cent in 2013).[8]

In terms of data-led activities, Combined Arts organisations tend to be in line with the arts and culture sector. The only difference is that significantly fewer Combined Arts organisations report using data to understand our audience better through data analysis, segmentation and/or profiling (39 per cent vs 46 per cent for the sector). As with the wider sector, the most common data-driven activity is using audience/visitor contact details to send out newsletters, (e.g. by email) (71 per cent). There have been no significant changes in the number of Combined Arts organisations undertaking data-led activities since 2013.

The impact of digital

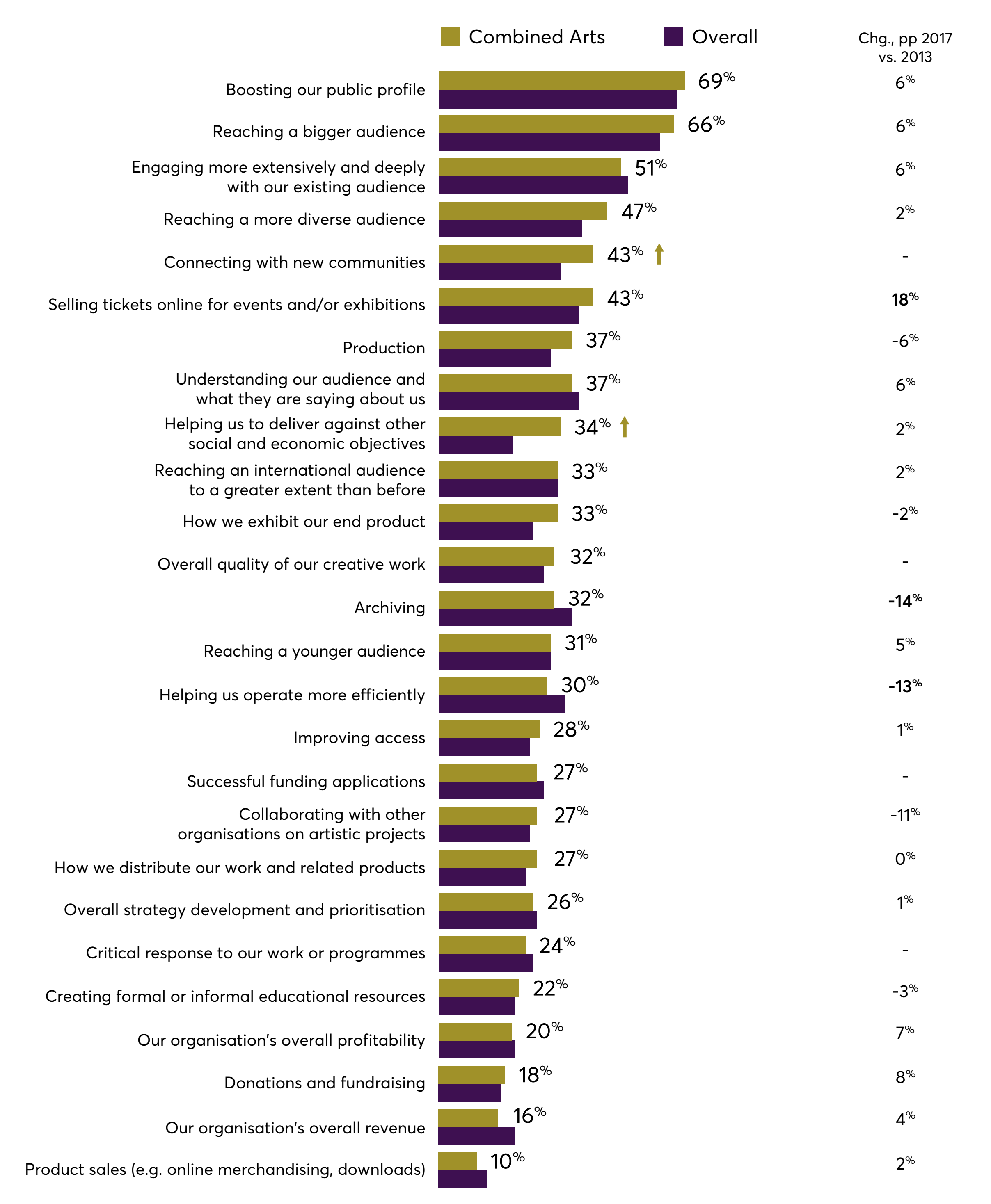
Proportion seeing major/ fairly major impacts overall	69 per cent (vs. 70 per cent for the whole sector)
Main area of impact	Boosting public profile

Overall, 69 per cent of Combined Arts organisations report a positive impact from digital on their ability to carry out their mission, in line with the whole sector (70 per cent).[9]

When it comes to the impact of digital technology on activities, Combined Arts organisations are similar to the wider arts and cultural sector in all but two areas (see Figure 3). Combined Arts organisations are significantly more likely than other artforms to report an impact on helping to deliver against other social and economic objectives and connecting with new communities.

Compared to 2013, a far greater number of Combined Arts organisations report a positive impact from selling tickets online. However, a significantly smaller proportion than previously report a positive impact on helping us to operate more efficiently and on archiving.

Figure 3: The impact of digital technology on business areas (Combined Arts vs. whole sector, 2017)



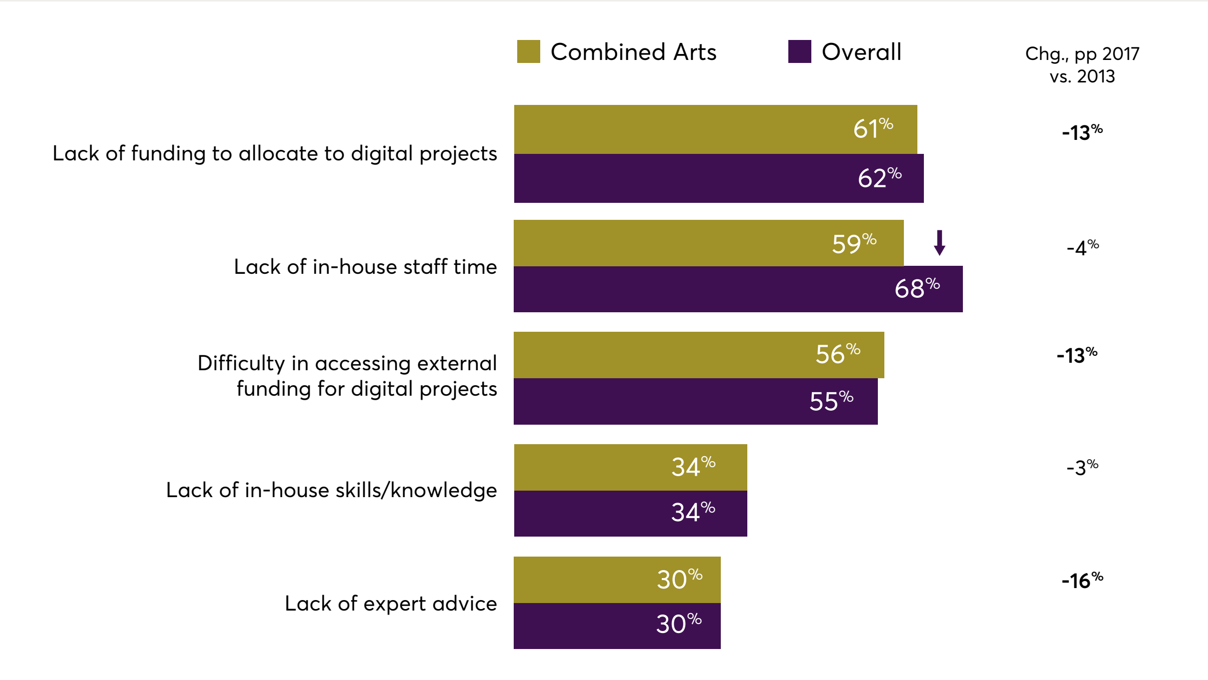
Thinking back over the past 12 months, would you say your organisation's use of the internet and digital technology has had a major positive impact, a minor positive impact, or no positive impact at all on each of the following? Statically significant changes 2013-2017 (at a 95 per cent confidence level)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

2017: Combined Arts n=150, Whole sector n=1,239; 2013: Combined Arts n=99.

Management factors

In line with the wider arts and cultural sector, the most common barriers Combined Arts organisations face to achieving their digital ambitions are a lack of funding for digital projects and lack of time (see Figure 4). In comparison to the sector as a whole, Combined Arts organisations are significantly less likely to identify lack of in-house staff time as a barrier to digital development (59 per cent vs. 68 per cent for the sector as a whole).[10] Overall, barriers appear not to be as widespread for Combined Arts organisations, as there are significant declines across five of the 14 barriers asked about in the Digital Culture survey.

Figure 4: Top five barriers felt by Combined Arts organisations (Combined Arts organisations vs. whole sector, 2017)

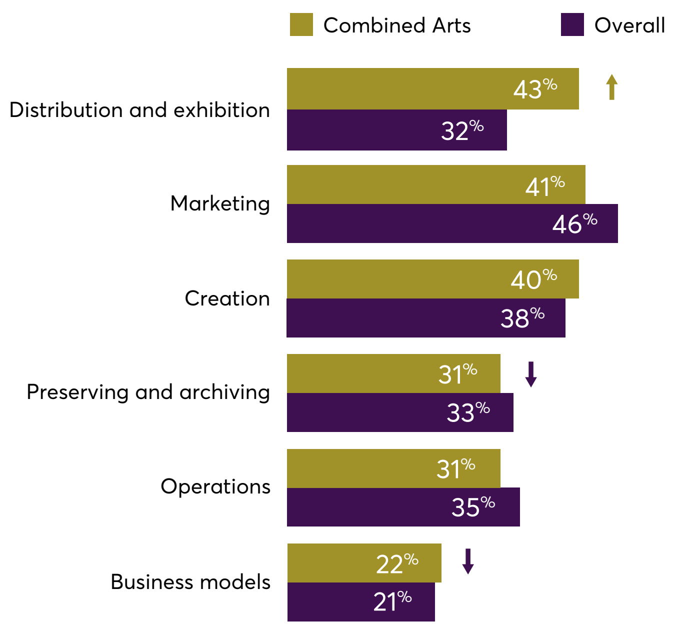


To what extent do you see each of the following as barriers to achieving your organisation's aspirations for digital technology?

2017: Combined Arts n=146, Whole sector n=1,200; 2013: Combined Arts n=95.

With regards to skills, Combined Arts organisations consider themselves broadly similar to their peers in most areas, as shown in Figure 5, except for skills related to distribution and exhibition. However, where most other artforms report marketing as the business area in which their skills are most advanced, Combined Arts organisations feel their skills in distribution and exhibition are the most advanced.

Figure 5: Proportion that report their organisation to have above average digital skills – 6-10 out of 10 - compared to their peers (Combined Arts 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: Combined Arts n=144, Whole sector n=1,187.

Combined Arts organisations appear similar to the arts and culture sector in terms of how well-served they are in specific skills areas. The only exception is database management/ customer relationship management, where they are significantly behind the sector (21 per cent vs 30 per cent). Since 2013, Combined Arts organisations have remained relatively stable in their perceived skills, except for all forms of digital commissioning and partner management, with fewer Combined Arts organisations report being well-served here, compared to 2013 (22 per cent vs 33 per cent in 2013).

Endnotes

1. 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'.
2. 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
3. 2017: Combined Arts n =171, Whole sector n = 1,424
4. 2017: Small Combined Arts organisations n=73, Medium-sized Combined Arts organisations n=56, Large Combined Arts organisations n=40
5. Online display advertising is online advertising that conveys a commercial message visually using text, logos, animations, videos, photographs, or other graphics.
6. 2017: Combined Arts n = 153, Whole sector n = 1,245
7. 2017: Combined Arts n = 158, Whole sector n =1,291
8. 2017: Combined Arts n-=158, 2013: Combined Arts n=99
9. 2017: Combined Arts n = 149, Whole sector n = 1,234
10. 2017: Combined Arts n = 146, Whole sector n = 1,200

Learn more about the 2017 Digital Culture survey findings

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

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