Literature

Fifty Literature 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 Literature sector is using technology to support its work.[1]

Importance of digital technology

Most important for →	Marketing
Least important for →	Creation

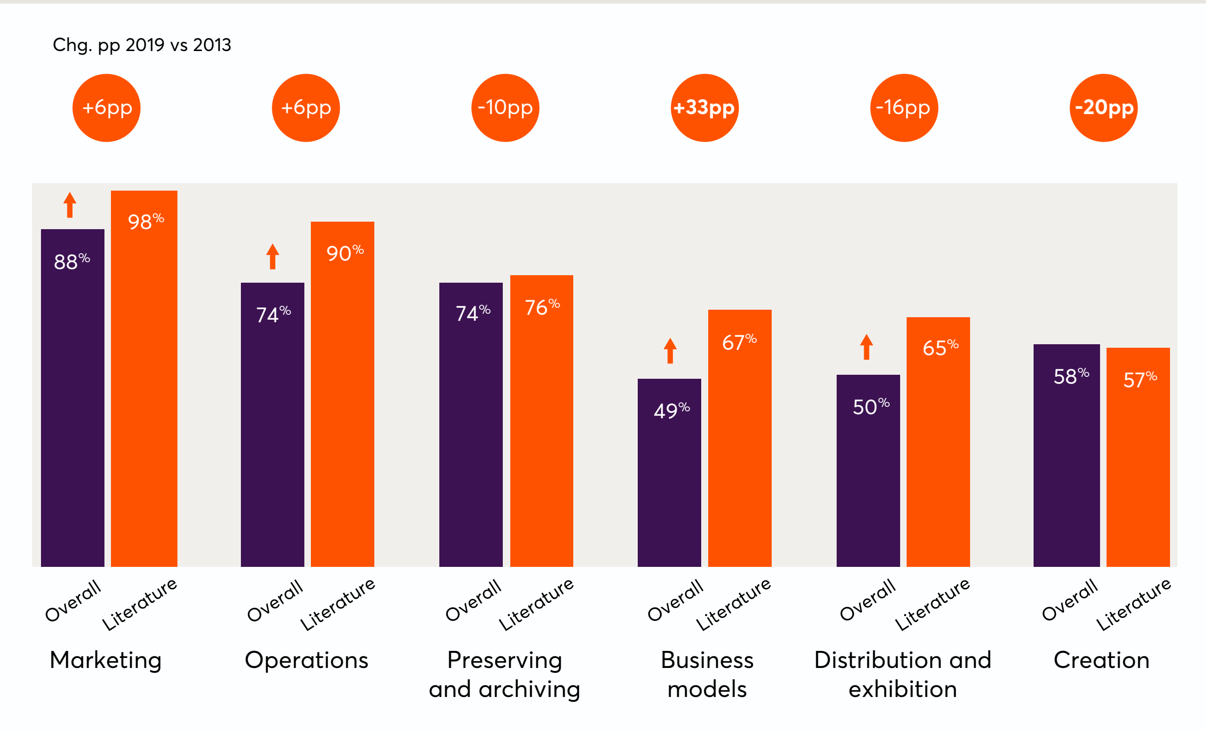
The Digital Culture survey findings suggest that Literature organisations tend to place more importance on digital technology than does the sector overall. This is most evident in relation to business models, where 67 per cent of Literature organisations perceive digital to be essential/important vs 49 per cent for the sector overall, and for operations (90 per cent of Literature organisations vs 74 per cent of the sector).

The only business area where Literature organisations perceive digital to be less essential/ important than the sector overall is creation (57 per cent of Literature organisations vs 58 per cent for the sector overall).[2]

Since 2013, the proportion of Literature organisations who perceive digital to be essential/important has fallen in three business areas: creation (77 per cent of Literature organisations perceived this to be the case in 2013 vs 57 per cent in 2019), distribution and exhibition (81 per cent in 2013 vs 65 per cent in 2019) and preserving and archiving (86 per cent in 2013 vs 76 per cent in 2019). Conversely three areas have seen an increase since 2013: business models (34 per cent of Literature organisations perceived digital to be essential/important in this area in 2013 vs 67 per cent in 2019), marketing (92 per cent in 2013 vs 98 per cent in 2019) and operations (84 per cent in 2013 vs 90 per cent in 2019).[3]

There are also three business areas in which the gap between Literature organisations and the sector overall has widened since 2013, such that Literature is now exceeding the sector average by a bigger margin. These are business models (no difference from the sector overall in 2013 vs 18 percentage points in 2019) marketing (1 percentage point in 2013 vs 10 percentage points in 2019), and operations (4 percentage points in 2013 vs 16 percentage points in 2019).[4]

Figure 1: Importance of digital (essential/important) to different areas – whole sector vs Literature, 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 = 1,110), 2019 – Literature organisations (n = 50); 2013 – Literature organisations (n = 54).

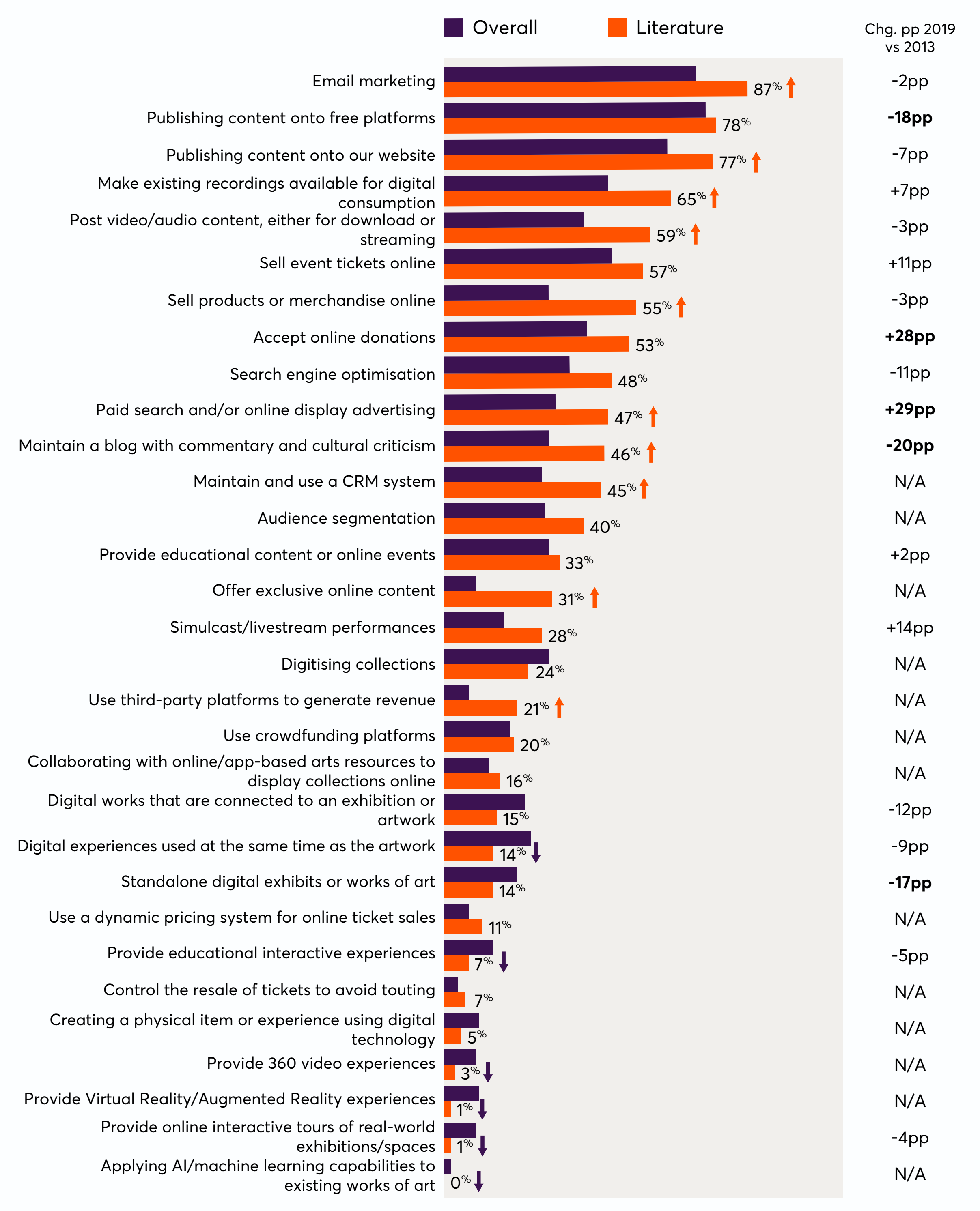
Digital activities

Top digital activities →	Email marketing and publishing content on free platforms and our own website
More likely than other other artforms to do… →	Sell products or merchandise online, offer exclusive online content and post video/audio content for download or streaming

On average, Literature organisations are more digitally active than the sector overall, doing ten different types of digital activity compared to 8.2 amongst the sector overall.[5] The activity types where there is the most difference between Literature organisations and the sector are selling products or merchandise online (55 per cent of Literature organisations do this vs 30 per cent of the sector overall), offering exclusive online content as an incentive to take up membership (31 per cent vs 9 per cent), and posting video/audio content for download or streaming (59 per cent vs 40 per cent). Literature organisations are less likely than the sector overall to engage in some other digital activity types, such as digital experiences designed to be used alongside and at the same time as the artwork or exhibition (14 per cent vs 25 per cent).[6]

There are five activity types that have increased amongst Literature organisations since 2013. The largest increases are simulcast/livestream performances (28 per cent in 2019 vs 14 per cent in 2013), paid search/online display advertising (47 per cent in 2019 vs 18 per cent in 2013) and accepting online donations (53 per cent in 2019 vs 25 per cent in 2013). Conversely, eleven activity types have declined, with the biggest decline being maintaining a blog with commentary and cultural criticism (66 per cent in 2013 vs 46 per cent in 2019).[7]

Figure 2: Digital activity types for Literature organisations vs overall 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 – Literature organisations (n = 50); 2013 – Literature organisations (n = 54).

When it comes to optimisation for mobile, Literature organisations are on par with the overall sector, with 71 per cent saying they have a mobile-optimised web presence versus 73 per cent for the sector overall.[8]

Literature organisations are also using the same number of social media platforms (4.2 on average amongst both Literature organisations and the sector overall).[9]

Of the fifteen social media platforms listed in the survey, the most popular among Literature organisations are Facebook (91 per cent vs 92 per cent in the sector overall) and Twitter (89 per cent vs 83 per cent). Since 2017 the popularity of Instagram has grown significantly, and it has now overtaken YouTube as the third most popular social media platform amongst Literature organisations (70 per cent of Literature organisations use Instagram in 2019, vs 40 per cent in 2017, whilst 60 per cent of Literature organisations use YouTube in 2019 vs 55 per cent in 2013). The substantial growth in Instagram use is mirrored across the sector overall.[10]

Literature organisations on average do 4.7 of the data-led activities tested in the survey – a similar number to the sector overall (4.3). However, compared to the sector overall, there are three data-led activities that Literature organisations are significantly more likely to do, these are: use data to inform the broader strategic direction of our organisation (53 per cent of Literature organisations vs 41 per cent of the sector), use data to understand our audience better (54 per cent vs 43 per cent) and use audience data to create a CRM system (30 per cent vs 20 per cent).[11]

While the average number of data-led activities that Literature organisations engage in has increased slightly since 2013, from 4.2 to 4.7, some data activities are less prevalent now than in 2013. For example, the proportion of Literature organisations that use data to identify and engage with our most valuable audience members has declined significantly, from 59 per cent in 2013 to 36 per cent in 2019. On the other hand, the proportion who use data to understand our audience better has significantly increased (54 per cent in 2019 vs 38 per cent in 2013).[12]

The positive impact of digital

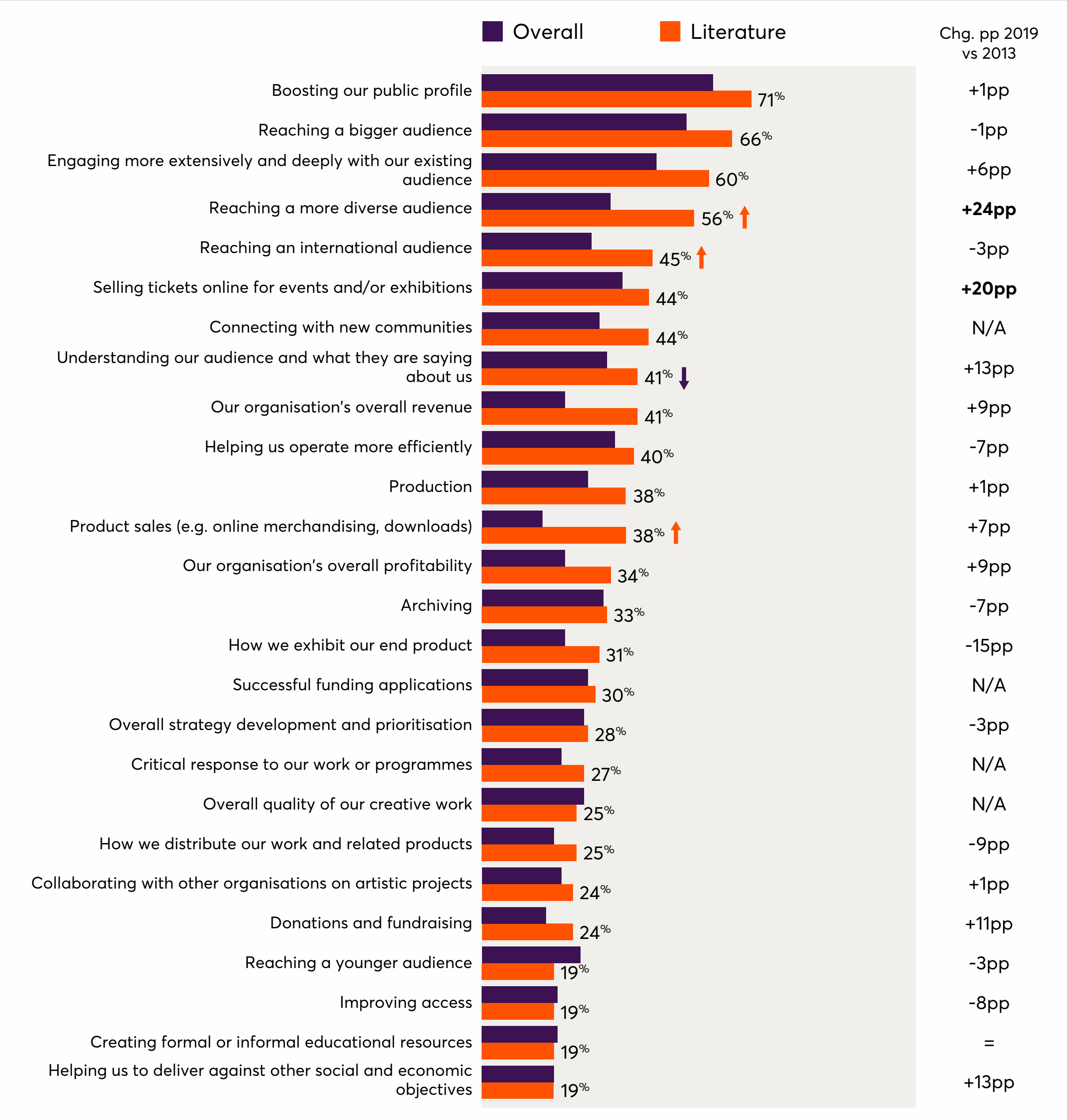
Proportion seeing major/fairly major positive impacts overall →	89 per cent (vs 67 per cent for the whole sector)
Main area of positive impact →	Boosting public profile

In the Digital Culture survey, organisations were asked how great an impact they felt digital technology had on their organisation's ability to fulfil its mission successfully. Overall, 89 per cent of Literature organisations report a major or fairly major positive impact on their ability to carry out their mission (scoring four or five on a five-point scale). This is significantly higher than the sector average of 67 per cent and is an increase of 10 percentage points since 2014 (when this question was first asked).[13]

In comparison with the sector overall, Literature organisations report higher levels of major positive impact in twenty-three out of the twenty-six impact areas asked about (see Figure 3). The disparity is greatest for reaching a more diverse audience (56 per cent of Literature organisations vs 32 per cent amongst the sector overall report a major positive impact in this area), our organisation's overall revenue (41 per cent vs 22 per cent) and product sales (38 per cent vs 16 per cent).[14]

Compared to 2013, significantly more Literature organisations report a major positive impact now from digital on reaching a more diverse audience (56 per cent in 2019 vs 32 per cent in 2013) and selling tickets online (44 per cent in 2019 vs 24 per cent in 2013). The greatest fall in the perceived positive impact of digital since 2013 has been for how we exhibit our end product (31 per cent in 2019 vs 46 per cent in 2013).[15]

Figure 3: Proportion of Literature organisations reporting a major positive impact of digital technology on business areas (Literature 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 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 = 997), 2019 – Literature organisations (n = 44); 2013 – Literature organisations (n = 54).

Management factors

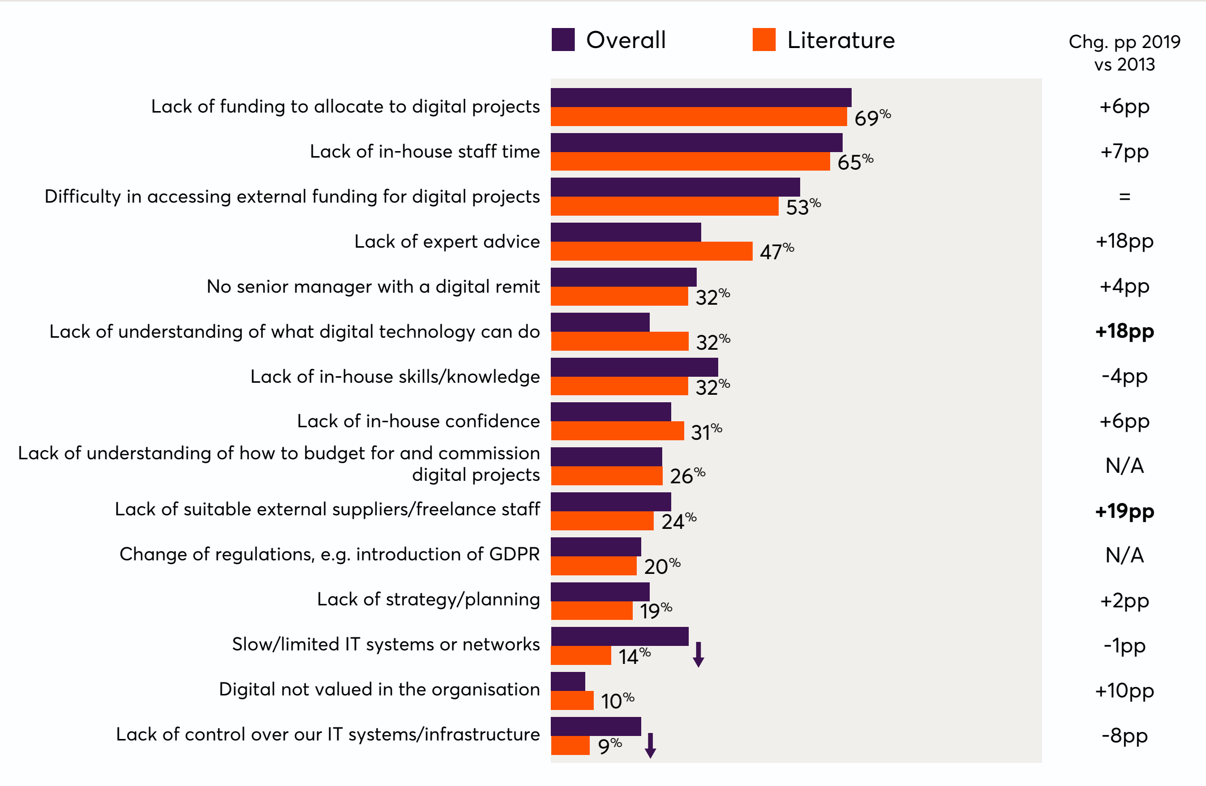
Biggest barrier →	Lack of funding to allocate to digital projects

In line with the sector overall, Literature organisations perceive a lack of funding as the most prevalent barrier to their digital ambitions (69 per cent amongst Literature organisations vs 70 per cent for the sector overall), followed by a lack of in-house staff time (65 per cent vs 68 per cent). These have remained persistent barriers but have increased in prevalence for Literature organisations since 2013 – lack of funding has risen from 63 per cent in 2013 to 69 percent in 2019, whilst lack of in-house staff time has increased from 58 per cent to 65 per cent.[16]

On the other hand, Literature organisations are significantly less likely than the sector overall to report that IT issues present barriers to achieving their digital ambitions. In particular, they are less likely to cite lack of control over our IT systems/infrastructure (9 per cent among Literature organisations vs 21 per cent of the sector overall) and slow/limited IT systems (14 per cent among Literature organisations vs 32 per cent of the sector overall) as barriers.[17]

Compared to 2013, there are three barriers that Literature organisations are now much more likely to report. These are a lack of suitable external suppliers/freelance staff (24 per cent in 2019 vs 5 per cent in 2013), lack of expert advice (47 per cent in 2019 vs 29 per cent in 2013) and a lack of understanding of what digital technology can do (32 per cent in 2019 vs 14 per cent in 2013).[18]

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



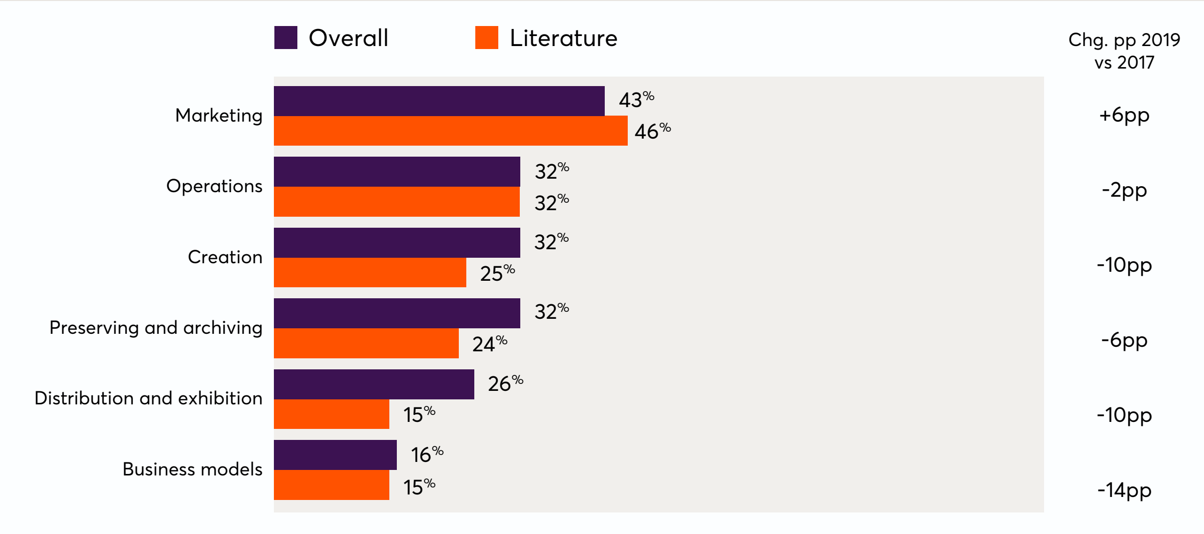
To what extent do you see each of the following as barriers to achieving your organisation's aspirations for digital technology? 'Chg. pp' = Change in percentage points. Statistically significant changes 2013–2019 (at a 95 per cent confidence level) highlighted in bold. N/A is stated where question was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

Base: 2019 – all respondents (n = 976), 2019 – Literature organisations (n = 44); 2013 – Literature organisations (n = 53).

Literature organisations in 2019 are less likely to report advanced skills in digital technology than the sector overall. The greatest difference is in distribution and exhibition, where only 15 per cent of Literature organisations claim to have advanced skills versus 26 per cent for the sector overall.[19]

Compared to 2017 (the first time this question was asked), perceptions of having advanced skills have fallen across most business areas amongst Literature organisations. The only area that has seen an increase reported in advanced skills is marketing (46 per cent in 2019 vs 40 per cent in 2017).[20] However, the sector as a whole has reported a fall in having advanced digital skills across all business areas, including marketing, which suggests that Literature organisations may be leading the sector in this area.

Figure 5: Proportion that report their organisation to have advanced digital skills (six–ten out of ten) compared to their peers (Literature 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 – Literature organisations (n = 44).

Since 2013, the Digital Culture survey has also asked organisations to look at a list of skills and capabilities in eleven key digital technology areas, rating each one according to whether they feel well-served or under-served for their needs in this area. This takes account of external options as well as internal resources, so feeling 'well-served' may involve having sufficient in-house skills or could be achieved through accessing external skills or expertise.

As in previous years, perceptions of Literature organisations being well-served for their needs are in line with the sector overall. There are no skills areas where significantly more or significantly fewer Literature organisations report being well-served, compared to the sector.[21]

Reflecting the wider sector, Literature organisations are most likely to report being under-served for their needs in data analysis (56 per cent of Literature organisations vs 39 per cent of the wider sector say they are under-served), user interface design and user testing (48 per cent vs 39 per cent), and database management/CRM (47 per cent vs 37 per cent).[22]

Endnotes

1. Please note, our sample size of Literature organisations (n = 50), allows for a margin of error of +/- 14 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 – Literature organisations (n = 50), all organisations – 2019 (n = 1,110).
3. Q10. Base: 2013 – Literature organisations (n = 54), 2019 – Literature organisations (n = 50).
4. Q10. Base: 2013 – Literature organisations (n = 54), 2019 – Literature organisations (n = 50); 2013 – all organisations (n = 891); 2019 – all organisations (n = 1,110).
5. Q12. Now thinking about your organisation's digital activities, please indicate which of the following your organisation currently does. Base: 2019 – Literature (n = 50), whole sector (n = 1,134).
6. Q12. Base: 2019 – all respondents (n = 1,134), 2019 – Literature organisations (n = 50).
7. Q12. Base: 2013 – Literature organisations (n = 54), 2019 – Literature organisations (n = 50).
8. Q23. Does your organisation currently have a web presence that is optimised for mobile devices? Base: 2019 – Literature organisations (n = 50), 2019 – all organisations (n = 1,134).
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 – Literature organisations (n = 45).
10. Q18. Base: 2019 – all respondents (n = 1,029), 2019 – Literature organisations (n = 45); 2013 – Literature organisations (n = 54).
11. 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 – Literature organisations (n = 45).
12. Q16. Base: 2019 – Literature organisations (n = 45), 2013 – Literature organisations (n = 52).
13. 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 – Literature organisations (n = 44); 2014 – Literature organisations (n = 58).
14. 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 – Literature organisations (n = 44).
15. Q28. Base: Literature organisations in the following years: 2013 (n = 54), 2019 (n = 44).
16. 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 respondents (n = 976); Literature organisations in the following years: 2013 (n = 53), 2019 (n = 44).
17. Q37. Base: 2019 – all respondents (n = 976), 2019 – Literature organisations (n = 44).
18. Q37. Base: Literature organisations in the following years: 2013 (n = 53), 2019 (n = 44).
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 – Literature organisations (n = 44).
20. Q67. Base: Literature organisations in the following years: 2017 (n = 79), 2019 (n = 44).
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 respondents (n = 970), 2019 – Literature organisations (n = 44).
22. Q45. Base: 2019 – all respondents (n = 970), 2019 = Literature organisations (n = 44).

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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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