Combined Arts

One hundred and forty-eight Combined 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 Combined Arts sector is using technology to support its work.[1]

Importance of digital technology

Most important for →	Marketing
Least important for →	Distribution and exhibition

Overall, Combined Arts organisations are slightly less likely than the sector overall to consider digital technology to be essential/important for five out of the six business areas tested in the Digital Culture survey. The only business area where more Combined Arts organisations perceive digital to be important compared to the sector as a whole is marketing (91 per cent of Combined Arts organisations consider digital essential/important here vs 88 per cent of the sector overall).[2]

As in previous years, and in line with the sector overall, the areas where the most Combined Arts organisations perceive digital technology to be essential/important are marketing followed by preserving and archiving and operations.

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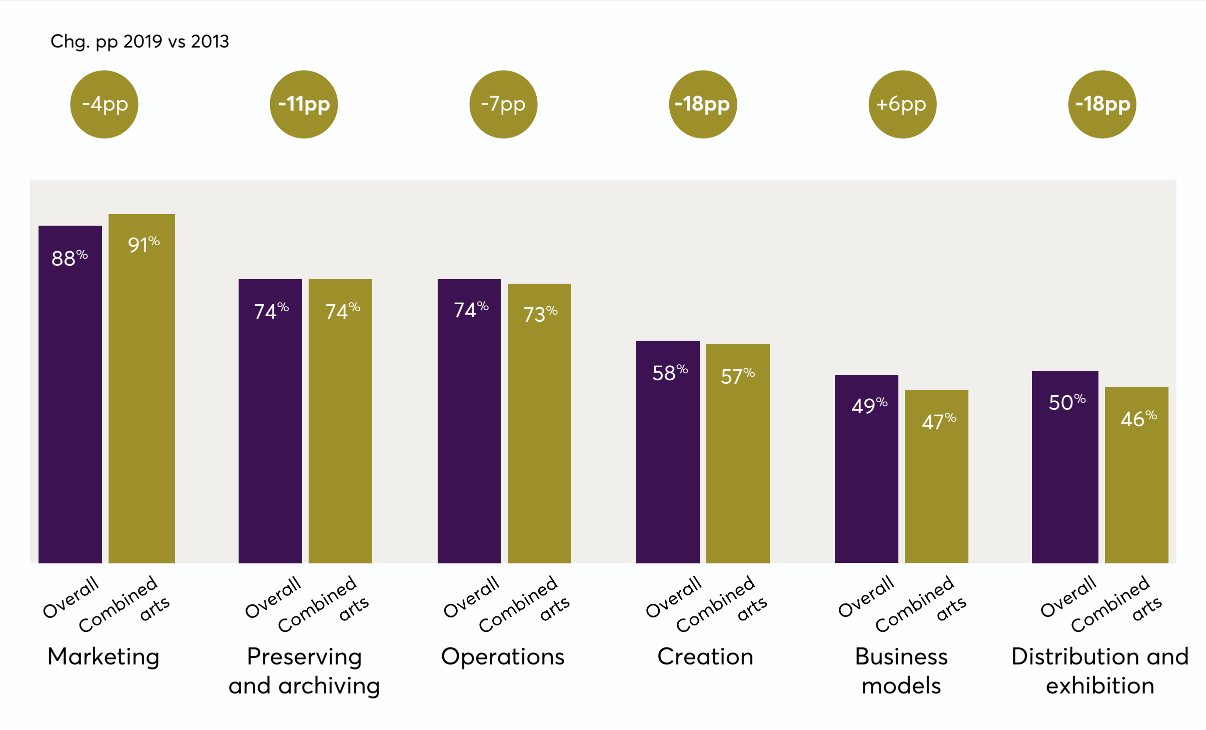
Figure 1: Importance of digital (essential/important) to different areas – whole sector vs Combined Arts, 2019



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.

Base: 2019 – all respondents (n = 1,113), 2019 – Combined Arts organisations (n = 146); 2013 – Combined Arts organisations (n = 99).

Since 2013, perceptions among Combined Arts organisations of digital being essential/important for marketing, business models and operations have remained relatively stable. However, perceptions of digital being essential/important for creation, distribution and exhibition and preserving and archiving have trended notably downwards over the same period.

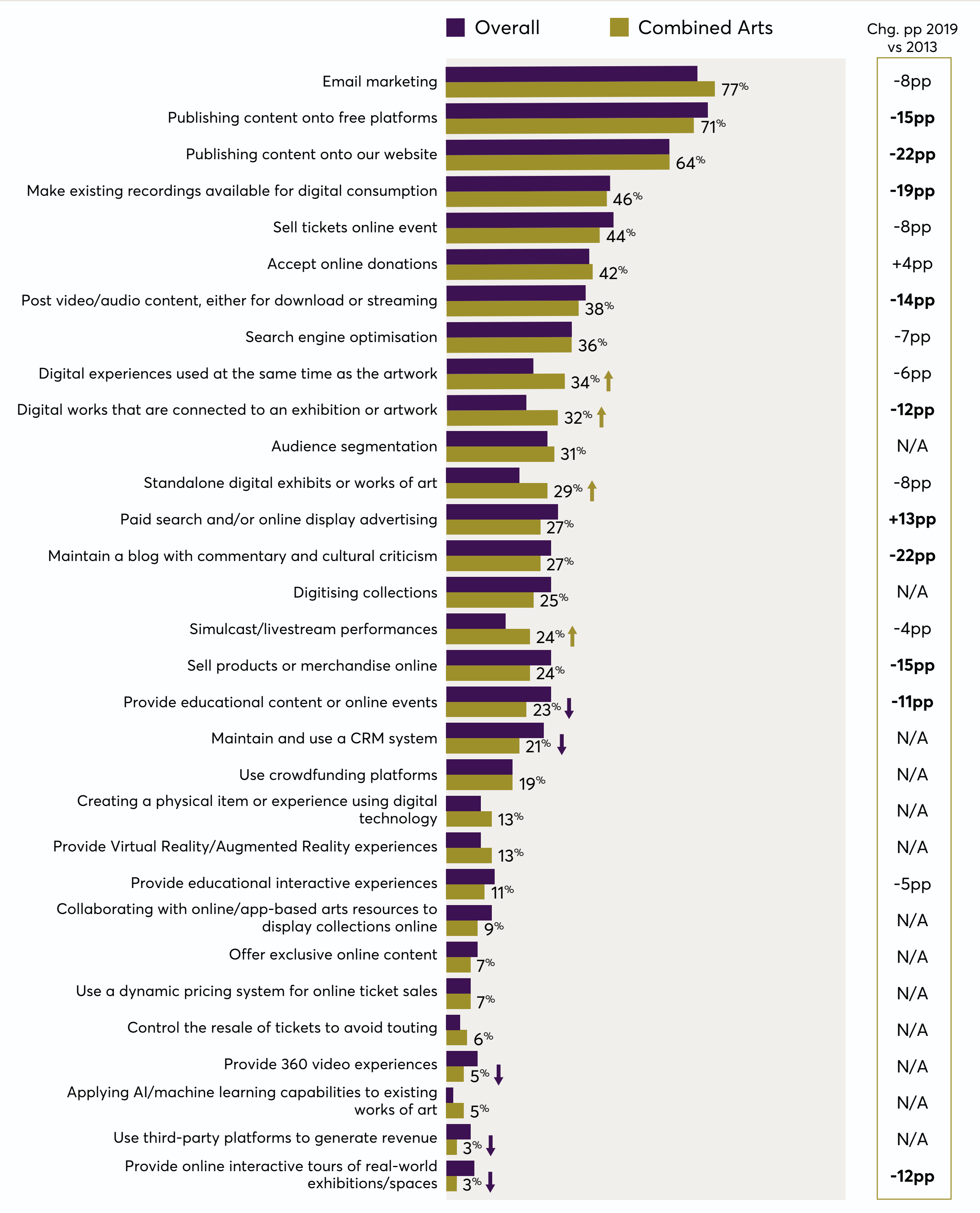
Digital activities

Top digital activities →	Email marketing, publishing content on free platforms and our own website
More likely than other other artforms to do… →	Digital experiences used at the same time as the artwork, digital works connected to an exhibition/artwork, standalone digital exhibits/works of art

Combined Arts organisations on average carry out the same number of digital activities as the sector as a whole; both average eight digital activity types.[3] Combined Arts organisations are significantly more likely than the sector overall to do four of the thirty-one activities listed: digital experiences used at the same time as the artwork (34 per cent of Combined Arts organisations do this vs 25 per cent of the sector), digital works connected to an exhibition or artwork (32 per cent vs 23 per cent), standalone digital exhibits or works of art (29 per cent vs 21 per cent) and simulcasting/livestreaming performances (24 per cent vs 17 per cent). Conversely, Combined Arts organisations are less likely than the sector overall to provide educational content or online events (23 per cent vs 30 per cent) or maintain and use a CRM system (21 per cent vs 28 per cent).[4]

Compared to 2013, the average number of digital activity types that Combined Arts organisations do has fallen from 10.3 to 8.3. Most activity types tested in the survey have declined amongst Combined Arts organisations since 2013. Only two activity types have trended upwards over this period: paid search and/or display advertising (14 per cent of Combined Arts organisations did this in 2013 vs 27 per cent in 2019) and accepting online donations (38 per cent vs 42 per cent).[5] For context, the sector overall has also seen a decline in most digital activities over this period. As with Combined Arts, paid search and/or display advertising and accepting online donations are the only two activities where the sector overall has seen a marked growth since 2013.

Figure 2: Digital activity types for Combined Arts 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 – Combined Arts organisations (n = 148); 2013 – Combined Arts organisations (n = 99).

Combined Arts organisations are slightly ahead of the sector overall in terms of having a mobile-optimised web presence: 78 per cent of Combined Arts organisations have a mobile-optimised web presence versus 73 per cent for the sector.[6] In line with the sector, this proportion has increased substantially over time from just 44 per cent of Combined Arts organisations in 2013.[7]

Combined Arts organisations are similar to the overall sector in terms of their usage of social media platforms. On average, both Combined Arts organisations and the sector use four out of the fifteen platforms listed in the survey. Facebook remains the most popular platform (91 per cent of Combined Arts organisations have an active profile vs 92 per cent of the sector). Following this are Twitter (78 per cent Combined Arts vs 83 per cent sector) and Instagram (67 per cent vs 65 per cent).[8]

Combined Arts organisations undertake on average the same number of data-driven activities as the sector overall: 4.3 out of the fifteen options listed. The most notable difference compared to the sector overall is that Combined Arts organisations are more likely to use data to inform the process of developing/commissioning creative works (34 per cent of Combined Arts organisations do this vs 25 per cent of the sector).[9]

Since 2013, Combined Arts organisations have become significantly less likely to use data to inform the process of new commercial products or services (31 per cent in 2013 vs 13 per cent now).[10] This data-led activity has also declined amongst the sector overall since 2013.

The positive impact of digital

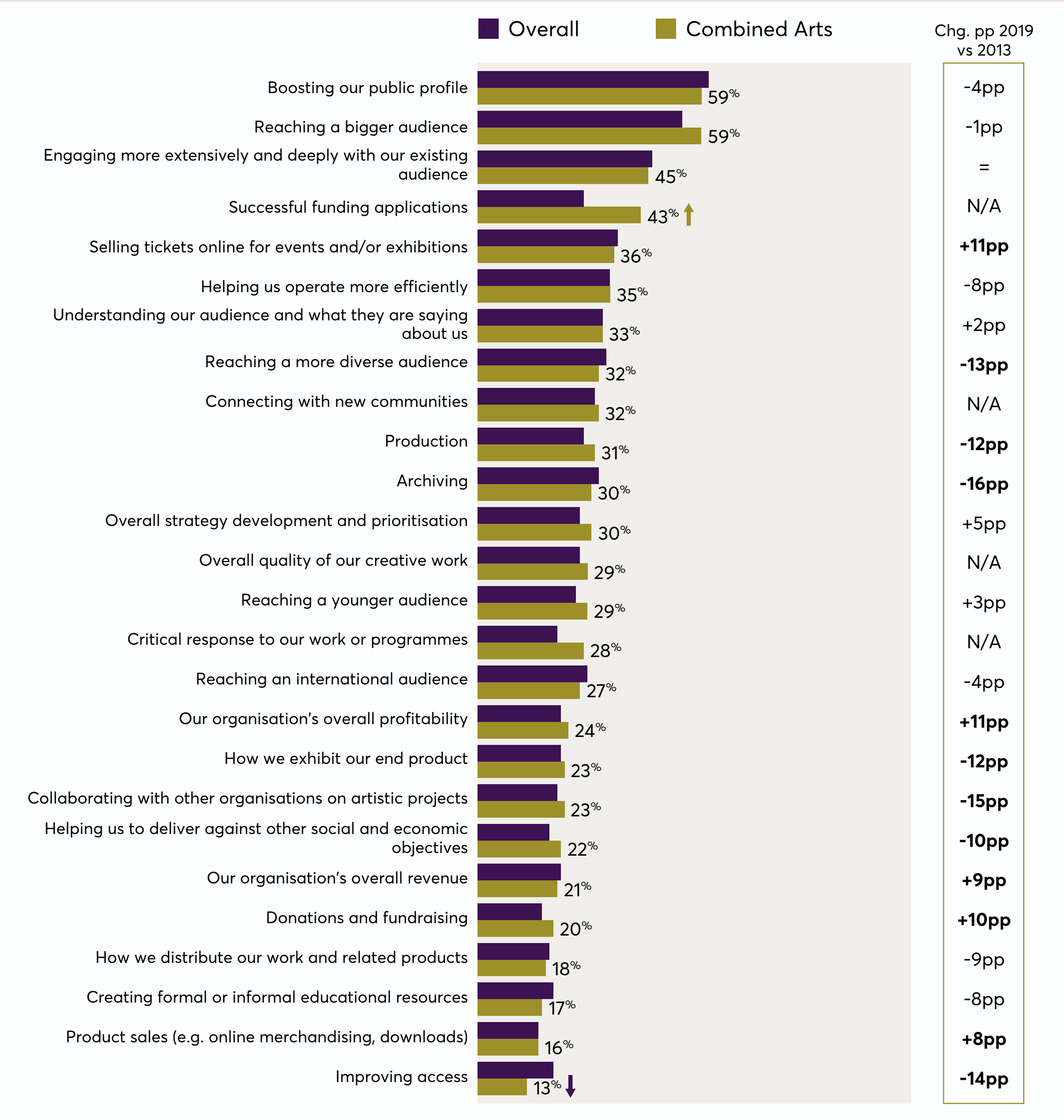
Proportion seeing major/fairly major positive impacts overall ➔	66 per cent (vs 67 per cent for the whole sector)
Main area of positive impact ➔	Boosting public profile

In the Digital Culture survey, organisations were asked about the impact of digital technology on their organisation's ability to fulfil its mission successfully. Overall, 66 per cent of Combined Arts organisations report a major or fairly major positive impact on their ability to carry out their mission, similar to the sector average of 67 per cent. This proportion has declined from 78 per cent of Combined Arts organisations and 73 per cent of the sector in 2014 (the first time this question was asked).[11]

Across most of the twenty-six business areas listed in the survey, Combined Arts organisations report similar levels of major positive impact as the sector overall. However, a significantly higher proportion of Combined Arts organisations report major positive impact in one area: successful funding applications (43 per cent of Combined Arts organisations report this vs 28 per cent of the sector overall).[12]

Compared to 2013, proportionately fewer Combined Arts organisations report major positive impact across the majority of business areas tested in the survey. The areas where the decline is most notable are archiving (46 per cent of Combined Arts organisations reported a major positive impact in 2013 vs 30 per cent in 2019) and collaborating with other organisations on exhibitions or artistic projects (38 per cent vs 23 per cent).[13]

Figure 3: Proportion of Combined Arts organisations reporting a major positive impact of digital technology on business areas (Combined 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 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.

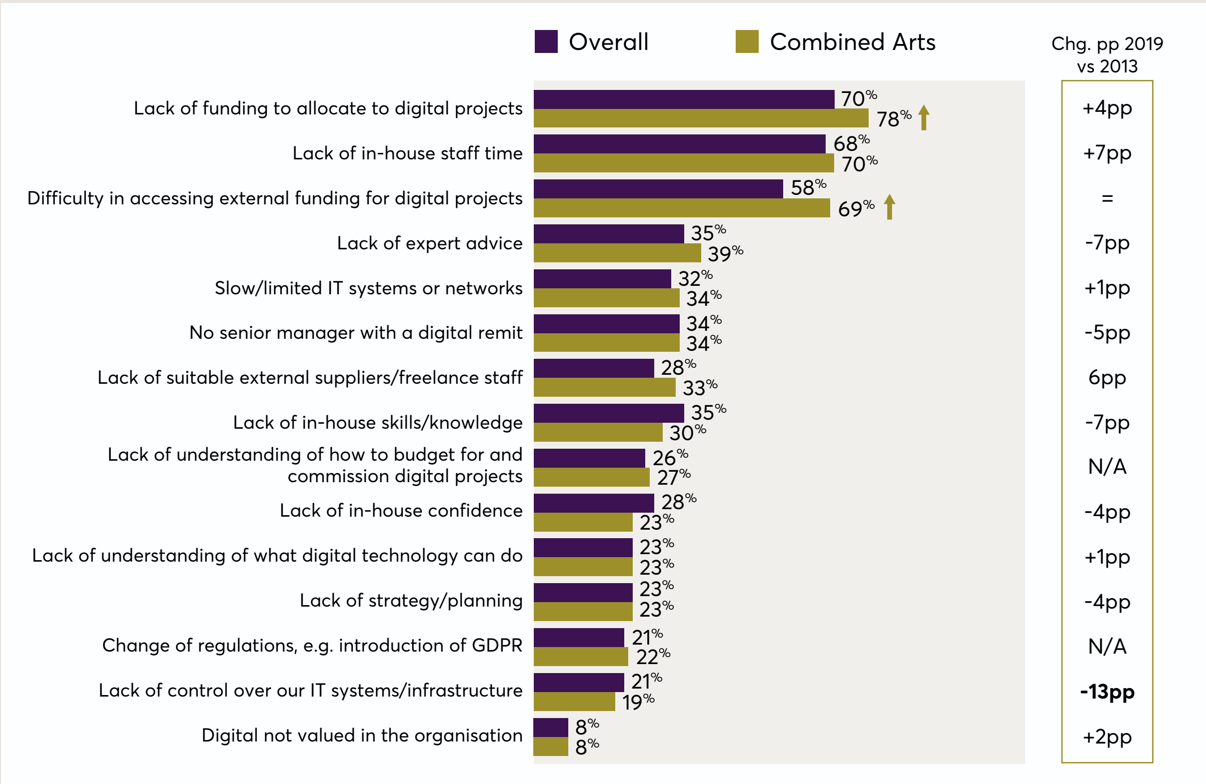
Base: 2019 – all respondents (n = 997), 2019 – Combined Arts organisations (n = 125); 2013 – Combined Arts organisations (n = 99).

Management factors

Biggest barrier →	Lack of funding to allocate to digital projects

In line with the sector overall, Combined Arts organisations perceive the main barriers hindering their ability to fulfil their digital ambitions to be lack of funding to allocate to digital projects (78 per cent amongst Combined Arts organisations vs 70 per cent for the sector), lack of in-house staff time (70 per cent vs 68 per cent) and difficulty in accessing external funding for digital projects (69 per cent vs 58 per cent). These figures indicate that lack of access to funding to support digital aspirations is more of an issue for Combined Arts organisations than it is across the sector overall.[14]

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

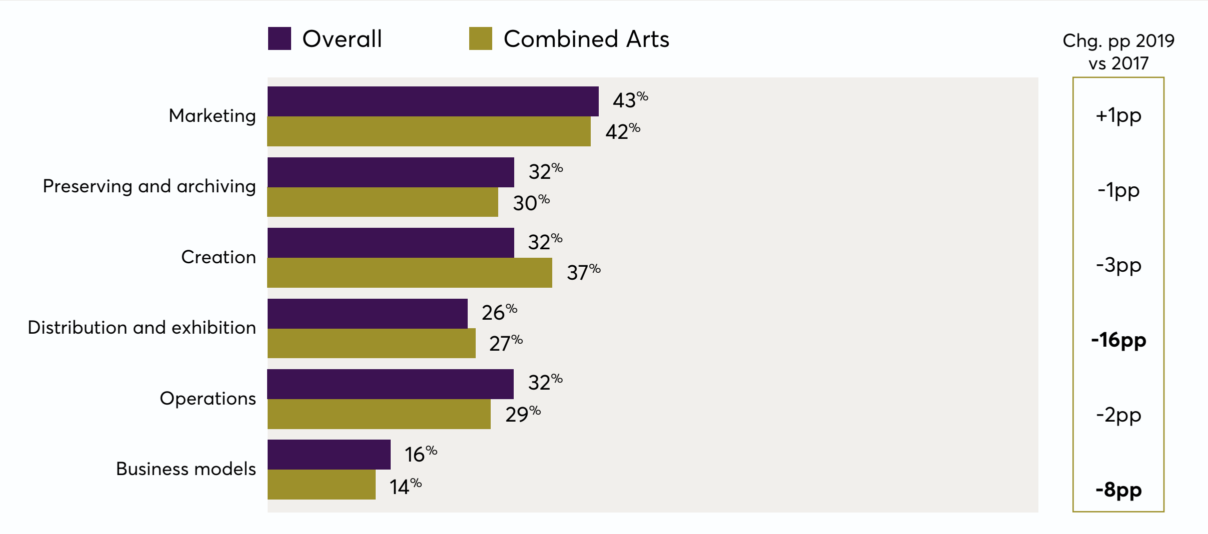


To what extent do you see each of the following as barriers to achieving your organisation's aspirations for digital technology? 'Chg. pp' = Change in percentage points. Statistically significant changes 2013–2019 (at a 95 per cent confidence level) highlighted in bold. Arrows show statistically significant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

Base: 2019 – all respondents (n = 976), 2019 – Combined Arts organisations (n = 123); 2013 – Combined Arts organisations (n = 95).

Across five out of six digital skills areas tested in the survey, Combined Arts organisations report similar levels of advanced skills compared to the sector overall. There is one digital skills area where Combined Arts organisations notably exceed the sector: creation (37 per cent among Combined Arts organisations vs 32 per cent of the sector). In line with the sector overall, a higher proportion of Combined Arts organisations report advanced digital skills in marketing than in any other area (42 per cent of Combined Arts organisations vs 43 per cent of the sector).[15]

Figure 5: Proportion of Combined 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. N/A is stated where question was not asked in 2013.

Base: 2019 – all organisations (n = 965), 2019 – Combined Arts organisations (n = 122); 2017 – Combined Arts organisations (n = 144).

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.

In nine of the eleven areas listed, a lower proportion of Combined Arts organisations report feeling well-served compared to the sector overall. The areas of greatest difference are digital marketing (56 per cent of Combined Arts organisations feel well-served vs 66 per cent of the sector), project management (18 per cent vs 25 per cent) and digital archiving (36 per cent vs 43 per cent).[16]

Compared to 2013, the proportion of Combined Arts organisations that say they are well-served for their needs has fallen in ten of the eleven business areas. The largest falls have been in project management (36 per cent of Combined Arts organisations felt well-served for their needs in this area in 2013 vs 18 per cent in 2019) and digital marketing (71 per cent in 2013 vs 56 per cent in 2019).[17]

Endnotes

1. Please note, our sample size of Combined Arts organisations (n = 148), 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 – Combined Arts organisations (n = 146).
3. 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 – Combined Arts organisations (n = 148).
4. Q12. Base: 2019 – all respondents (n = 1,134), 2019 – Combined Arts organisations (n = 148).
5. Q12. Base: Combined Arts organisations in the following years: 2013 (n = 99), 2019 (n = 148).
6. Q23. Does your organisation currently have a web presence that is optimised for mobile devices? Base: 2019 – all organisations (n = 1,003), 2019 – Combined Arts organisations (n = 126).
7. Q23. Base: 2013 – Combined Arts organisations (n = 99).
8. 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 – Combined Arts organisations (n = 133).
9. 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 – Combined Arts organisations (n = 134).
10. Q16. Base: Combined Arts organisations in the following years: 2013 (n = 97), 2019 (n = 134).
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 – Combined Arts organisations (n = 125); 2014 – Combined Arts 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 – Combined Arts organisations (n = 125).
13. Q28. Base: Combined Arts organisations in the following years: 2013 (n = 99), 2019 (n = 125).
14. 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 – Combined Arts organisations (n = 123).
15. 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 – Combined Arts organisations (n = 122).
16. 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 – Combined Arts organisations (n = 123).
17. Q45. Base: Combined Arts organisations in the following years: 2013 (n = 97), 2019 (n = 123).

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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