mtm

National Portfolio Organisations

Three hundred and sixty two of the 663 National Portfolio Organisations (NPOs) participated in the Digital Culture Survey 2017 of how arts and cultural organisations in England use digital technology. They include organisations of different sizes and artforms from across England, giving us a detailed picture of how NPOs are using technology to support their work

NPOs tend to be larger organisations than the sector norm (i.e. have a turnover of over £500k). Larger organisations tend to ascribe more importance to digital, and report more activities and greater positive impact. However, even when we compare larger NPOs to larger organisations in the sector as a whole, we find that NPOs still tend to be more engaged in digital, carrying out more types of digital activity and experiencing greater impact.

Importance of digital technology

Top digital activities	Marketing, operations
More likely than others to…	Distribution and exhibition, creation

Looking across different organisational functions, the areas that the highest proportion of NPOs say that digital is important for are marketing and operations, whilst fewer NPOs attribute importance to creation and to distribution and exhibition.

Compared to the wider arts and cultural sector, NPOs are significantly more likely to say that all organisational functions are important except preserving and archiving, which is slightly higher than the sector average, but not significantly so (see Figure 1). This is particularly true for operations, which has seen consistently high levels since 2013, and for business models, which is the only area for which digital technology has significantly gained in importance since 2013.

nesta

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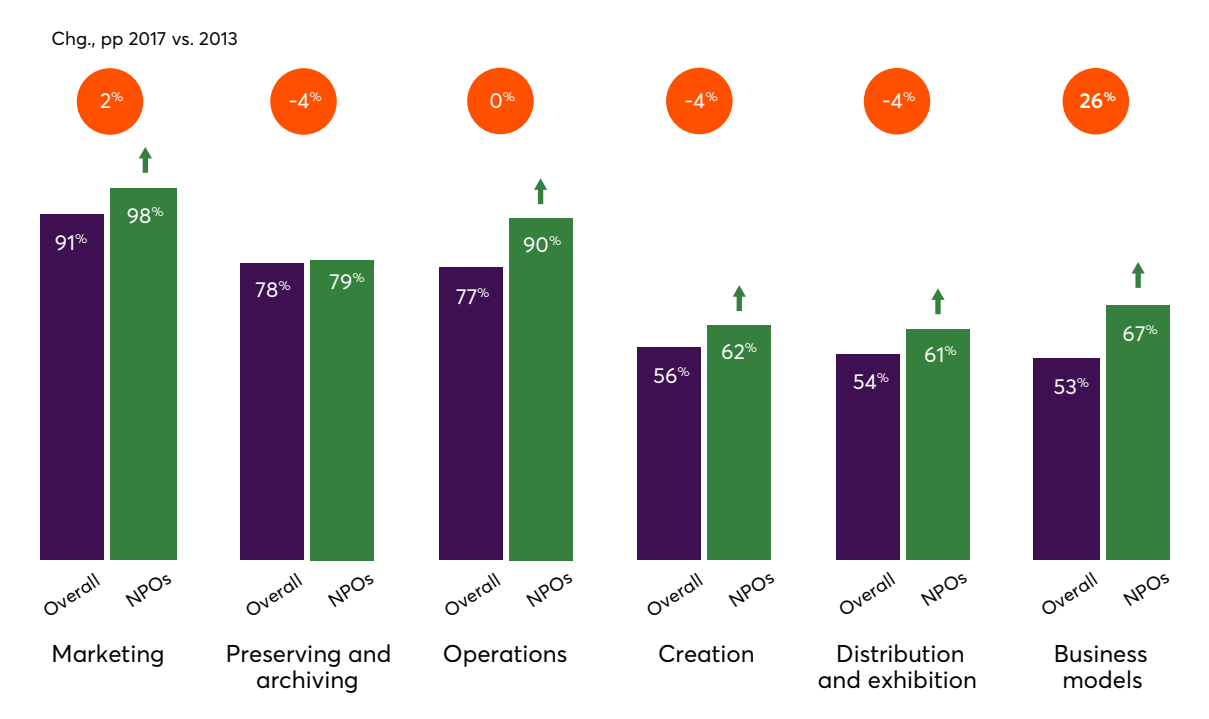
Figure 1: Importance of digital to different activity areas (whole sector vs. NPOs, 2017)



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.

2017: NPOs n=359, Whole sector n=1,391, 2013: NPOs n=391.

Digital activities

Top digital activities	Email marketing, and publishing content on free platforms and on our own website
More likely than others to…	Simulcast/livestream performances, accept online donations and sell event tickets online

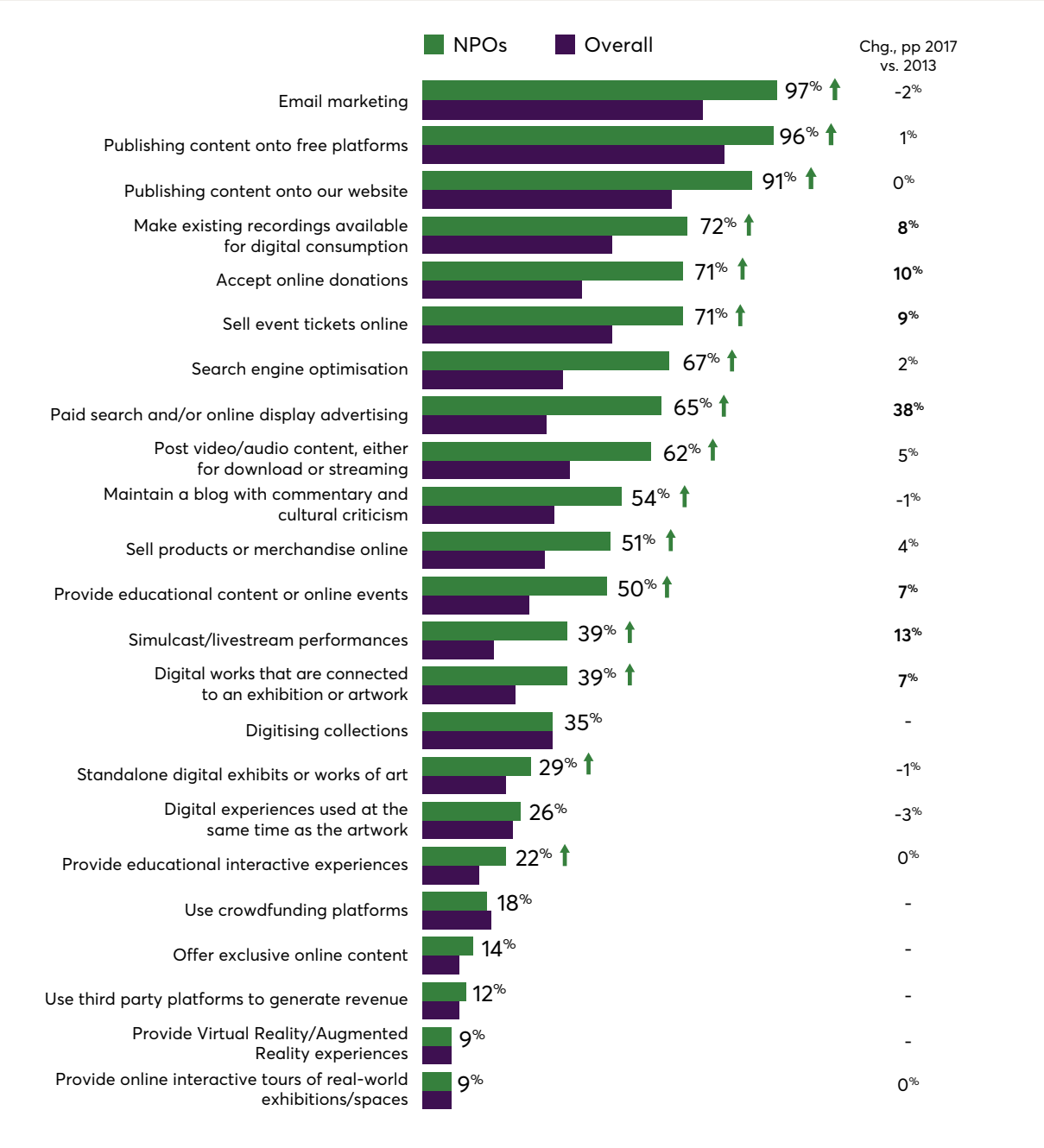
NPOs tend to be more digitally diverse compared to the sector as a whole, engaging in a significantly greater range of activities. On average, they do 11 different types of activity compared to 7.8 among the sector as a whole.[1]

NPOs are significantly more likely than the sector average to do 16 out of the 23 activities asked about (see Figure 2). The biggest areas of difference are: paid search or online display advertising; search engine optimisation; accepting online donations; posting video/

audio content for download or streaming; publishing content onto their own website, email marketing; making existing recordings available for digital consumption; selling products or merchandise online; and simulcasting/livestreaming.

Seven activity areas have seen significant growth since 2013. Paid search (up 38 per cent) and simulcasting/livestreaming (up 13 per cent) have increased the most, followed by two areas related to revenue generation - accepting online donations (up 10 per cent) and selling event tickets online (up 9 per cent).

Figure 2: Digital activities for NPOs 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: NPOs n=362, Whole sector n = 1,424; 2013: NPOs n=391.

When it comes to mobile, NPOs are significantly ahead of the wider arts and cultural sector. Eighty-two per cent of NPOs now have a mobile-optimised web presence compared to the 69 per cent sector average, and this has increased significantly since 2013 (from 46 per cent).[2] Over 60 per cent of UK online time (for consumers generally) is now spent on mobile, and so, arts and cultural organisations that are not yet optimised for mobile should recognise this as a priority.[3]

The most popular social platforms used by NPOs are the same as for the wider sector, however, NPOs are significantly more likely to use them. Facebook and Twitter are used ubiquitously by the NPOs who participated in the survey (100 per cent for Facebook and 99 per cent for Twitter, compared to 92 per cent for Facebook and 85 per cent for Twitter among the whole sector). Instagram is the third most popular platform for NPOs (79 per cent vs 48 per cent in the whole sector), followed by YouTube (77 per cent vs 50 per cent in the whole sector).

Significantly more NPOs are doing all of the data-driven activities asked about in the Digital Culture Survey, compared to the sector average. For example, 96 per cent of NPOs use audience/visitor contact details to send out newsletters, (e.g. by email), compared to 76 per cent of the whole sector. Seventy-eight per cent of NPOs use data to understand our audience better through data analysis, segmentation and/or profiling, compared to 46 per cent of the sector and 77 per cent of NPOs use data to develop our online strategy, (e.g. investment and social media presence), compared to 43 per cent of the sector.

A significantly higher proportion of NPOs are doing three of the 11 data-driven activities asked about, compared to 2013. These are using data to understand our audience better through data analysis, segmentation and/or profiling (78 per cent vs 68 per cent in 2013), using data to develop our online strategy, (e.g. investment and social media presence (77 per cent vs 69 per cent in 2013) and using data to inform the process of developing/commissioning creative art works, events or exhibitions (33 per cent vs 25 per cent in 2013). Over the same period, uptake of individual data activities in the whole sector has broadly stood still or retreated slightly.

The impact of digital

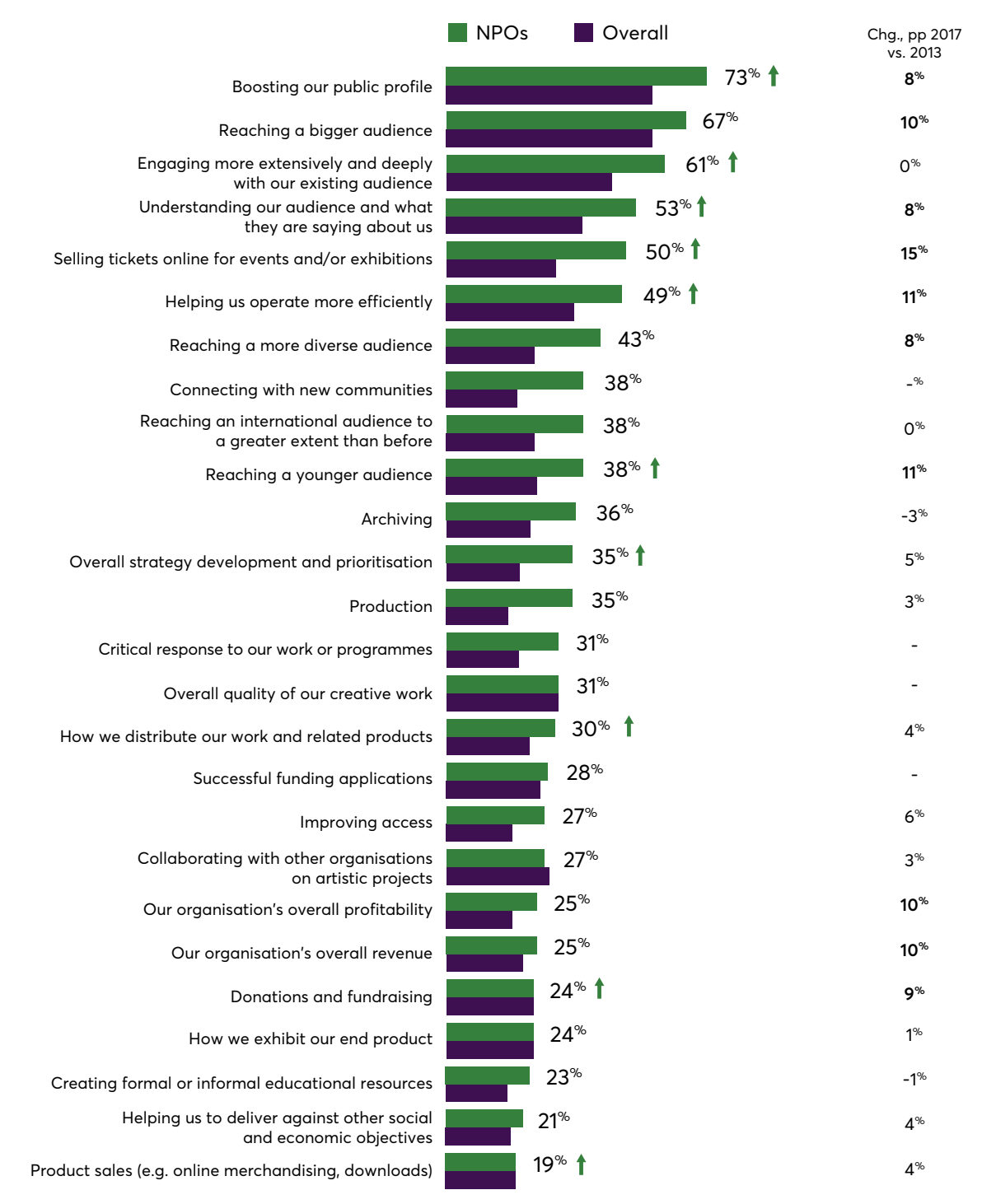
Proportion seeing major/ fairly major impacts overall	79 per cent (vs. 70 per cent for the whole sector
Main area of impact	Boosting public profile

Overall, 79 per cent of NPOs report a major or fairly major positive impact from digital, which is significantly above the sector average of 70 per cent.[4] NPOs also report significantly higher levels of impact than the rest of the sector across ten of the 26 impact areas (see Figure 3). The largest differences are across understanding our audience and what they are saying about us, helping us operate more efficiently, and selling tickets online.

Since 2013, the proportion of NPOs reporting positive impact in ten of the areas asked about has increased significantly. These include audience development areas, such as boosting our public profile, reaching a bigger audience, understanding our audience and what they are saying about us, reaching a more diverse audience, and reaching a younger audience. More NPOs also report positive impact from their business models and

operations activities, for example selling tickets online, helping us operate more efficiently, our organisation's overall profitability, our organisation's overall revenue, and donations and fundraising.

Figure 3: The impact of digital on activity areas - NPOs 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.

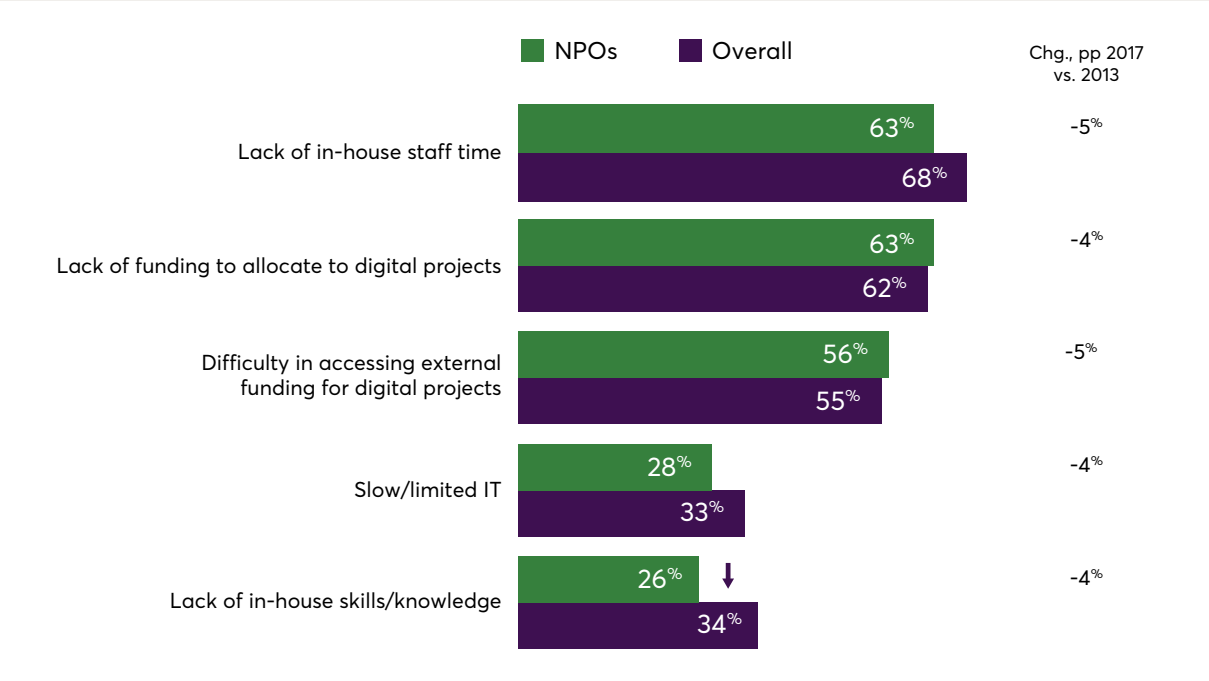
2017: NPOs n=346, Whole sector n=1,239; 2013: NPOs n=391.

Management factors

In line with the wider arts and cultural sector, NPOs cite lack of time and funding as the main barriers to their digital ambitions (see Figure 4). They are significantly less likely than the sector as a whole, though, to report barriers in 11 out of the 14 areas asked about. These include: lack of in-house skills and knowledge (13 per cent vs. 24 per cent sector average); lack of expert advice (19 per cent vs. 30 per cent); lack of control over our IT systems/infrastructure (18 per cent vs. 24 per cent); no senior manager with a digital remit (24 per cent vs. 32 per cent); lack of strategy/planning (9 per cent vs. 18 per cent); lack of understanding of what digital technology can do (13 per cent vs. 21 per cent); and lack of understanding of how to budget for and commission digital projects with existing resources (20 per cent vs. 27 per cent).

Since 2013, four of the barriers asked about are significantly less common; lack of understanding of what digital technology can do (13 per cent vs. 19 per cent in 2013), lack of strategy/planning (9 per cent vs. 15 per cent), lack of expert advice (19 per cent vs. 29 per cent), and lack of suitable external suppliers/freelance staff (13 per cent vs. 19 per cent). All of the top five barriers are now reported to be less prevalent amongst NPOs than they were in 2013, albeit none of them have seen a statistically significant decline.

Figure 4: Top 5 Barriers felt by NPOs vs. whole sector, 2017

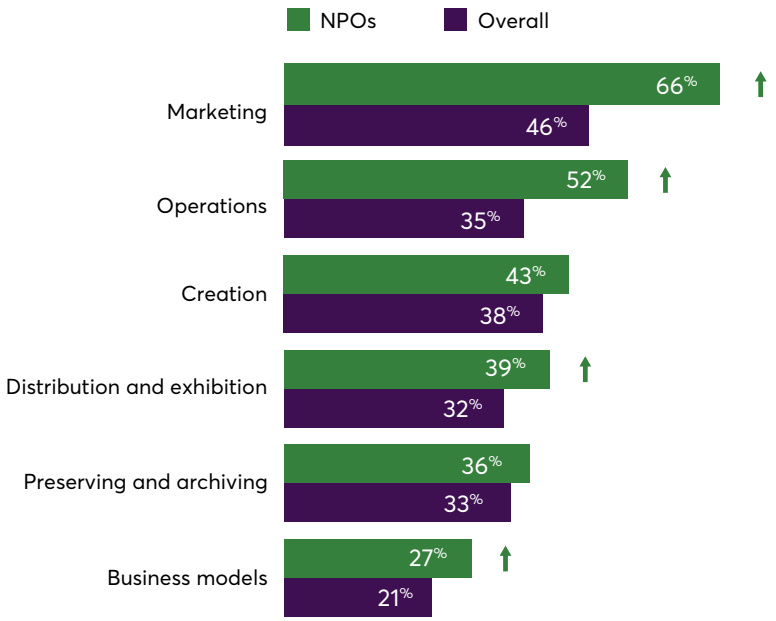


To what extent do you see each of the following as barriers to achieving your organisation's aspirations for digital technology?

2017: NPOs n=344, Whole sector n=1,200; 2013: NPOs n=386.

In comparison to their peers, NPOs see themselves as having above average skills across all business areas, significantly so for four areas: marketing, operations, distribution and exhibition, and business models (see Figure 5).

Figure 5: Proportion that report their organisation to have above average digital skills – 6-10 out of 10 - compared to their peers (NPOs 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: NPOs n=344, Whole sector n=1,187.

Significantly more NPOs report being well-served for 11 out of the 14 skill areas asked about, compared to the sector average. The biggest gaps can be seen for digital strategy and planning (61 per cent vs 38 per cent for whole sector); data analysis (53 per cent vs 34 per cent for whole sector) and database management/customer relationship management (CRM) (48 per cent vs 30 per cent for whole sector). More NPOs report being well-served for digital marketing than any other skill area (85 per cent), again being significantly ahead of the sector average (69 per cent).

Since 2013, there has been a significant increase in the number of NPOs reporting being well-served for rights clearance, from 23 per cent in 2013 to 29 per cent in 2017. There have been no other significant increases or declines over this time. The gap between NPOs and the sector has remained stable overtime, with the overall sector only reporting two significant movements since then.

Endnotes

1. 2017: NPO n=362, Whole sector n=1,424.
2. 2017: NPO n = 346, Whole sector n = 1,245; 2013 NPO n = 389.
3. ComScore MMX Multi-Platform, January 2017.
4. 2017: NPO n = 346, Whole sector n = 1,234.

Learn more about the 2017 Digital Culture survey findings

For a better understanding of how NPOs 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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