

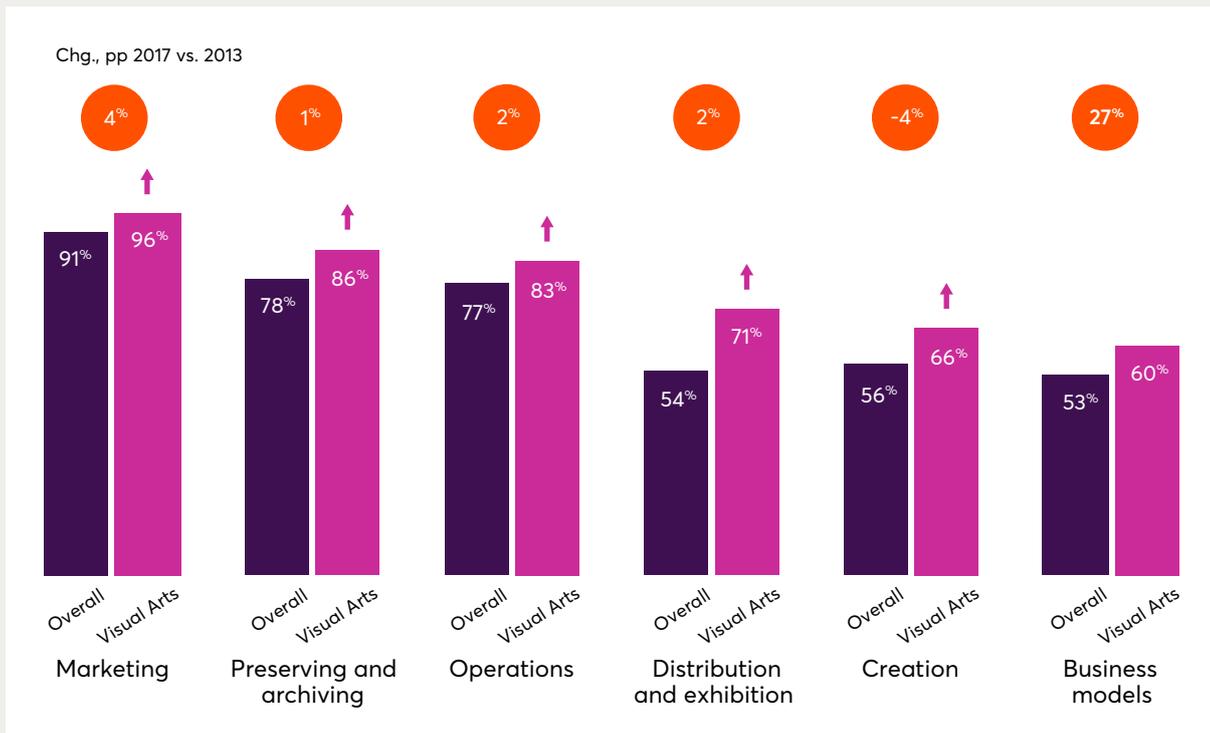
## Visual Arts

One hundred and ninety nine Visual 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 Visual Arts sector is using technology to support its work.

### Importance of digital technology

In line with previous years, more Visual Arts organisations place importance on digital, across all organisational functions, than the whole sector. Marketing and preserving and archiving continue to be the areas in which digital is seen as important by most Visual Arts organisations, closely followed by operations (see Figure 1). Business models remains the area in which fewest organisation see digital as important.

Figure 1: Importance of digital to different business areas (whole sector vs. Visual 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.

2017: Visual Arts n=194, Whole sector n=1,391, 2013: Visual Arts n=152.

However, business models is the only area where, proportionately, the importance of digital technology has significantly increased since 2013.<sup>1</sup> This increase can be seen across all scales of Visual Arts organisation. In 2013, significantly more large Visual Arts organisations (i.e. defined by turnover)<sup>2</sup> said digital technologies were important for business models (58 per cent) than did medium-sized (36 per cent) and small organisations (24 per cent). There is now less of a gap. In 2017, 52 per cent of small organisations, 73 per cent of medium-sized organisations and 69 per cent of large Visual Arts organisations say digital technologies are important for business models.<sup>3</sup>

## Digital activities

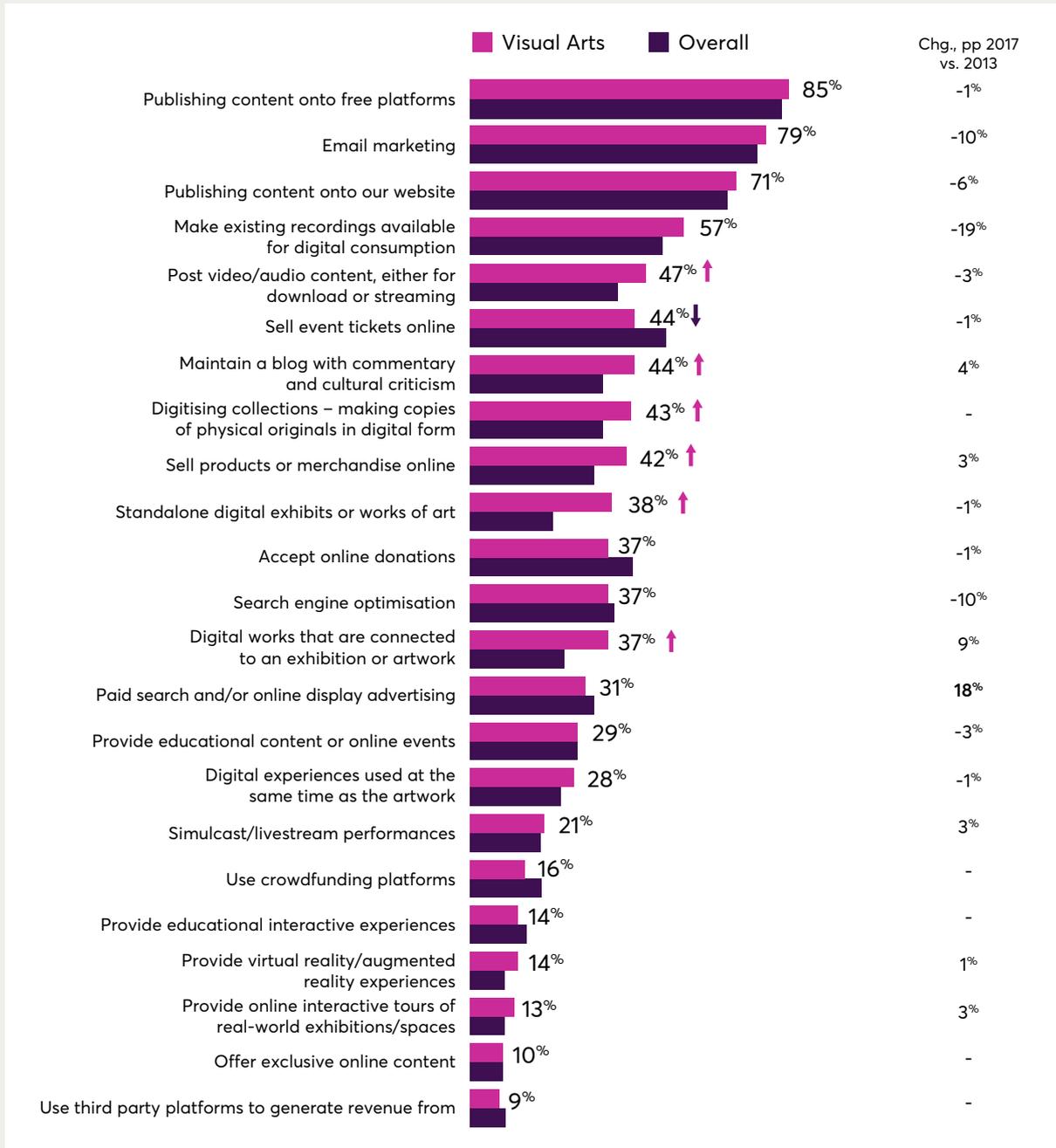
<p><b>Top digital activities</b></p>	<p>Publishing content onto free platforms, email marketing and publishing content onto own website</p>
<p><b>More likely than other other artforms to...</b></p>	<p>Create standalone digital exhibits or works of art; create digital works that are connected to an exhibition or artwork; and maintain a blog with commentary and cultural criticism</p>

In comparison to other art and cultural forms, Visual Arts organisations are the most digitally diverse, averaging more types of digital activity than any other artform. On average, they engage in 9.0 different types of digital activity compared to 8.2 for the sector as a whole.<sup>4</sup> This is particularly true for larger Visual Arts organisations, who average 12 different types of digital activity. Medium sized Visual Arts organisations do 9.5; and small Visual Arts organisations do 7.9, which places them more on a par with the sector as a whole.

Visual Arts organisations are notably ahead of the sector average in terms of: standalone digital exhibits or works of art (38 per cent vs. 22 per cent sector average), digital works connected to an exhibition or artwork (37 per cent vs. 25 per cent), selling products or merchandise online (42 per cent vs. 33 per cent), posting video/audio content for download or streaming (47 per cent vs. 39 per cent) and digitising collections (43 per cent vs. 35 per cent).<sup>5</sup>

Compared to 2013, significantly more Visual Arts organisations engage in paid search and/or online display advertising (31 per cent vs. 13 per cent in 2013).<sup>6</sup> However, there has been a decline in the number of Visual Arts organisations engaged in making existing recordings available for digital consumption (57 per cent vs 76 per cent in 2013).

Figure 2: Digital activities for Visual Arts organisations 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: Visual Arts n=199, Whole sector n = 1,424; 2013: Visual Arts n=152.

When it comes to mobile, Visual Arts organisations are slightly ahead of the sector as a whole, although not significantly so, with 73 per cent having a mobile-optimised web presence (vs. 69 per cent for the whole sector). Visual Arts organisations have also seen a significant increase in mobile optimisation over time, from 40 per cent in 2013 to 73 per cent in 2017.<sup>7</sup> As over 60 per cent of UK online time (for consumers generally) is now spent on mobile, arts and culture organisations that are not yet optimised for mobile should recognise this as a priority.<sup>8</sup>

Visual Arts organisations are broadly similar to the rest of the sector in their use of social media, with Facebook (90 per cent) and Twitter (86 per cent) being the most used social media platforms. They are significantly more likely than the sector as a whole, though, to use Instagram (69 per cent vs 48 per cent) and Vimeo (35 per cent vs. 27 per cent for the whole sector).<sup>9</sup>

Visual Arts organisations are more likely than any other artforms to use data for six out of the 11 data-driven activities we asked about. These mostly relate to audience engagement or to developing their strategy. For example, 48 per cent of Visual Arts organisations report that they use data to identify and engage with their most valuable audience members (compared to 41 per cent among the whole sector) and 55 per cent use data to inform the broader strategic direction of their company (compared to 43 per cent among the whole sector).<sup>10</sup>

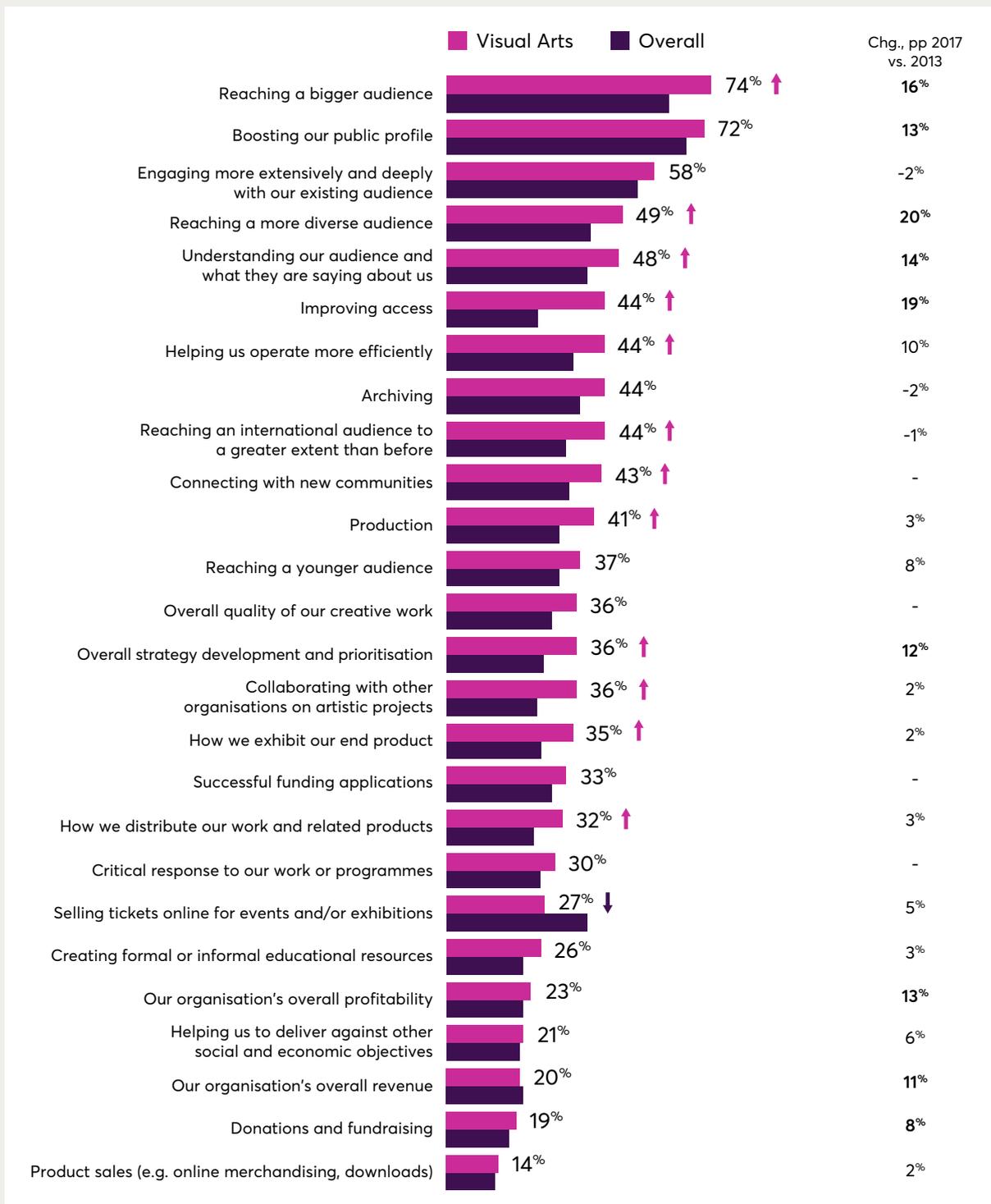
## The impact of digital

Proportion seeing major/ fairly major impacts overall	86 per cent (vs. 70 per cent for the whole sector)
Main area of impact	Reaching a bigger audience

Overall, Visual Arts is the artform with the highest proportion of organisations that report a positive impact from digital on their ability to carry out their mission (86 per cent), significantly above the sector average of 70 per cent.<sup>11</sup> Large, medium and small Visual Arts organisations all attribute a similar level of impact to digital for fulfilling their overall mission (87 per cent, 92 per cent and 82 per cent respectively).

Visual Arts organisations report significantly higher levels of impact for nearly half of the areas tracked. The largest differences relate to audience development and engagement. The number of Visual Arts organisations experiencing impact in these areas has risen significantly since 2013 (see Figure 3).<sup>12</sup>

Figure 3: The impact of digital technology on business areas (Visual Arts organisations 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: Visual Arts n=176, Whole sector n=1,239; 2013: Visual Arts n=152.

In some areas, significantly more medium-sized Visual Arts organisations report major impact than did small Visual Arts organisations. For example, 60 per cent of medium-sized organisations say digital has had a major impact on reaching a more diverse audience, compared to 37 per cent of small organisations.

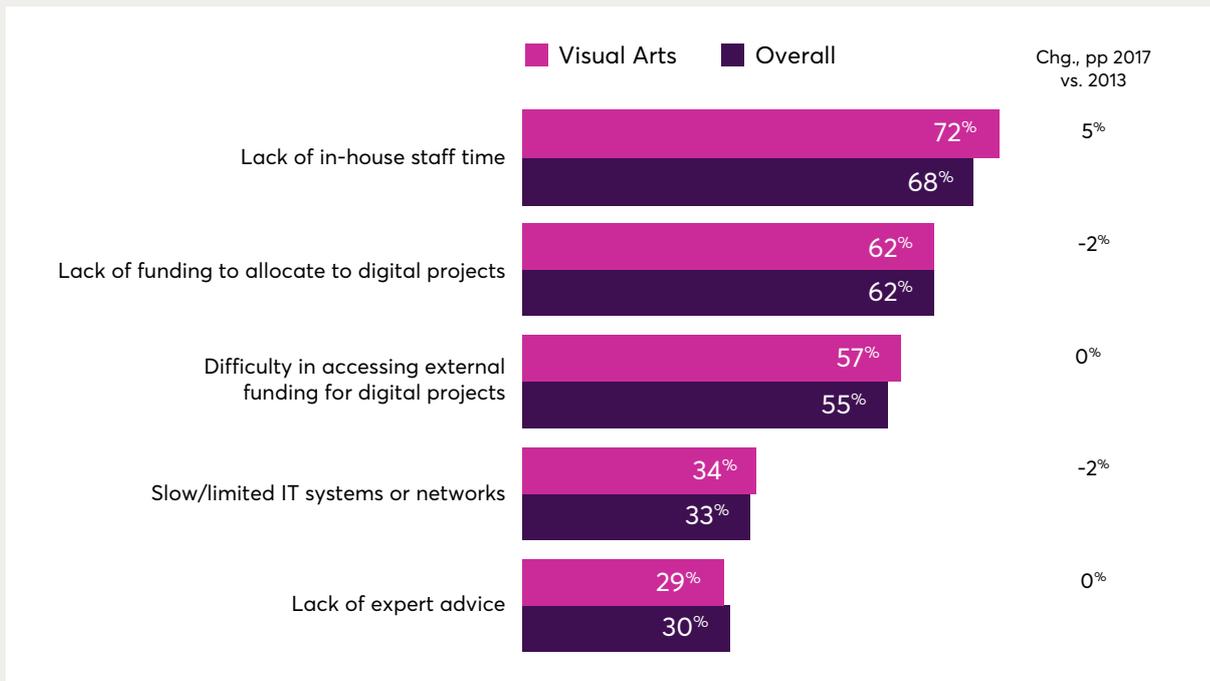
Overall though, the gap between large and small Visual Arts organisations appears to be closing. Since 2013, significantly fewer large Visual Arts organisations have reported digital having a major impact across three impact areas: engaging more extensively with our existing audience (75 per cent in 2013 to 42 per cent in 2017); production (49 per cent in 2013 and 27 per cent in 2017); and how we exhibit our end product (42 per cent in 2013 and 16 per cent in 2017), whilst more small Visual Arts organisations have reported digital having a major impact across five areas: reaching a more diverse audience (19 per cent in 2013 and 46 per cent in 2017); our organisation's overall revenue (5 per cent in 2013 and 18 per cent in 2017); our organisation's overall profitability (8 per cent in 2013 and 24 per cent in 2017); overall strategy development and prioritisation (19 per cent in 2013 and 40 per cent in 2017); and improving access (13 per cent in 2013 and 41 per cent in 2017).

## Management factors

<b>Biggest barrier</b>	Lack of in-house staff time
<b>Biggest skills gap</b>	Database management/CRM

In line with the rest of the sector, Visual Arts organisations say the most significant barriers to realising their digital ambitions continue to be lack of time and resources.<sup>13</sup> There have been no significant reductions or increases in the barriers faced by Visual Arts organisations since 2013.

Figure 4: Top 5 Barriers felt by Visual Arts organisations (Visual Arts organisations vs. whole sector, 2017)

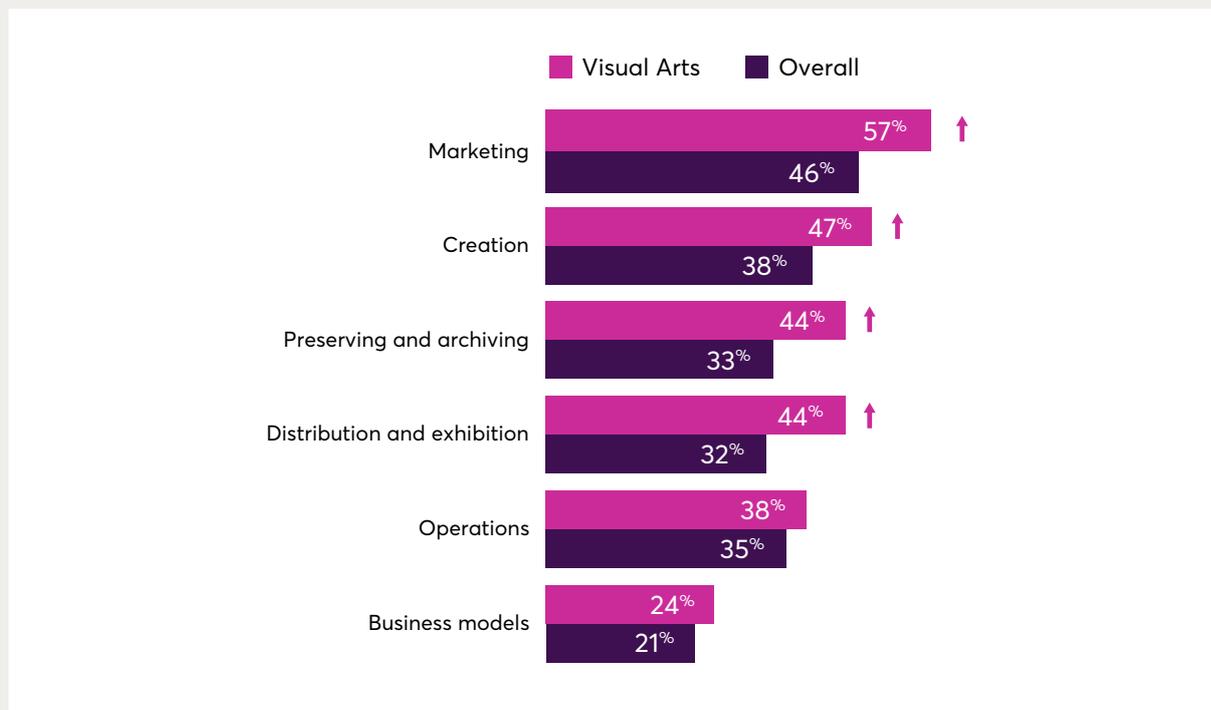


To what extent do you see each of the following as barriers to achieving your organisation's aspirations for digital technology?

2017: Visual Arts n=170, Whole sector n=1,200; 2013: Visual Arts n=151.

In terms of their digital skills profile, more Visual Arts organisations report having advanced skills in comparison to their peers across marketing, creation, preserving and archiving and distribution and exhibition, compared to the wider sector.<sup>14</sup> Visual Arts organisations feel their most advanced skills are across marketing and creation, whilst their least advanced skills are across business models.

Figure 5: Proportion that report their organisation to have above average digital skills – 6-10 out of 10 - compared to their peers (Visual 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: Visual Arts n=170, Whole sector n=1,187.

When it comes to specific skill areas tracked, Visual Arts organisations tend to be slightly ahead of or in line with the rest of the sector. For example, they feel most well-served for digital marketing, with 75 per cent of Visual Arts organisations reporting this. This is slightly ahead of the sector as a whole, but not significantly so (69 per cent). This is followed by digital production (55 per cent vs 48 per cent) and multimedia/website design (both 50 per cent).

Since 2013, more Visual Arts organisations are reporting being well-served across digital production (55 per cent vs 43 per cent in 2013) and data analysis (38 per cent vs 26 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'. 2017: Visual Arts n = 193, 2013: Visual Arts n = 152.
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: Visual Arts under £100,000 n = 89, Visual Arts £100k – £499,999 n = 54, Visual Arts £500k+ n = 41; 2013: Visual Arts under £100,000 n = 43, Visual Arts £100k – £499,999 n = 57, Visual Arts £500k+ n =43.
4. 2017: Visual Arts n = 189, Whole sector n = 1,353.
5. 2017: Visual Arts n = 189, Whole sector n = 1,353.
6. 2017: Whole sector n = 1,245, Visual Arts n = 177, 2013: Visual Arts n = 152.
7. ComScore MMX Multi-Platform, January 2017.
8. 2017: Visual Arts n = 185, Whole sector n = 1,291.
9. 2017: Whole sector n = 1,298, Visual Arts n = 185.
10. 2017: Visual Arts n = 176, Whole sector n = 1,234.
11. 2017: Visual Arts n = 176, 2013: Visual Arts n = 152.
12. 2017: Visual Arts n = 170, Whole sector n = 1,200.
13. 2017: Visual Arts n = 170, Whole sector n = 1,187.
14. 2017: Visual Arts n = 170, Whole sector n = 1,193, 2013: Visual Arts n =152.

## Learn more about the 2017 Digital Culture survey findings

For a better understanding of how Visual 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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