CULTURE AT A CROSSROADS:

DIGITAL TRANSFORMATION IN THE AGE OF COVID-19

2020 GLAM DIGITAL TRANSFORMATION
SURVEY FINDINGS

axiell

TABLE OF CONTENTS

INTRODUCTION

Over the last decade, and with growing urgency, museums, libraries, and other cultural institutions have faced questions of how best to showcase their collections in an increasingly digital world. For decades, and even centuries, cultural institutions staked their raison d'être on amassing and physically presenting large holdings of culturally significant assets. But with billions of people experiencing the world around them through smaller and more powerful screens, cultural institutions have experienced the same disruption as nearly every other industry.

In response, some institutions, mostly well-funded, have jumped feet first into digital, with others taking more measured, incremental steps. Out of necessity, others have held out for a future date.
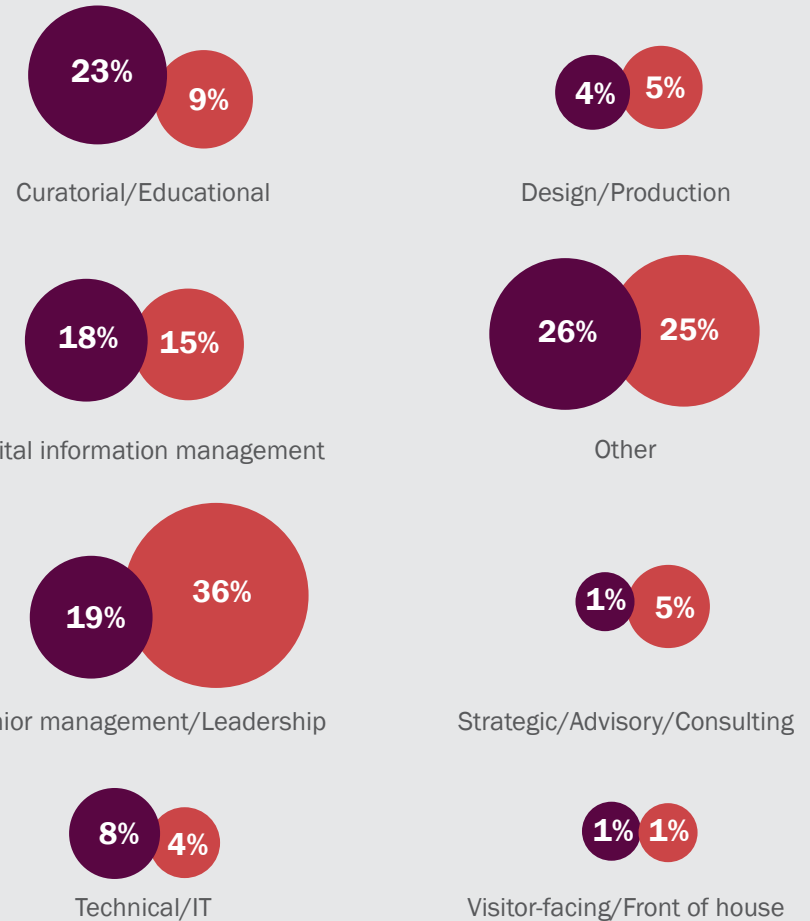
Due to COVID-19, that future date is now.

Drawing on the views of 120 professionals at galleries, libraries, archives, museums and other collections, this report presents a real-time snapshot of cultural institutions as they assess their digital priorities and preferences during one of the most challenging operating environments in the sector's history.

These 120 voices demonstrate an industry that recognizes the growing importance of harnessing digital, but one unsure that its strategies meet the ever-shifting goalposts. With technology evolving at such a speed, it is understandable to feel as though you are falling behind.

But when the world went into lockdown and the existence of cultural institutions was threatened, there came an opportunity to recalibrate and a chance to grow digitally. This recalibration is manifested in the findings of this report.

" Cultural institutions have experienced the same disruption as nearly every other industry. "

• MY ROLE IN MY ORGANIZATION IS PRIMARILY: •

23% **9%**
Curatorial/Educational

4% **5%**
Design/Production

18% **15%**
Digital information management

26% **25%**
Other

19% **36%**
Senior management/Leadership

1% **5%**
Strategic/Advisory/Consulting

8% **4%**
Technical/IT

1% **1%**
Visitor-facing/Front of house

METHODOLOGY REFERENCE FOR SURVEY
120 decision makers took part in our study

● 2020   ● 2016

3

REACTIVE VS. PROACTIVE DIGITAL TRANSFORMATION

The trend towards "all things digital" has accelerated across industries, but it is playing out differently in the cultural sector. With their unique, often massive, physical collections, museums and other cultural institutions haven't faced the same drop in physical patronage as, say, retailers have. Yet at the same time, evolving to meet the preferences of a new generation of digital natives is a safe, long-term solution.

Back in 2016, in a survey conducted in partnership with MuseWeb, Axiell asked decision makers and staff at a variety of cultural institutions the same set of questions about digital priorities, strategies, investments, and execution.

The survey found a cultural sector aware of the opportunities and threats posed by digital, accompanied by varying degrees of readiness to play by its rules. In 2016, for example, nearly 50% of respondents said their organization's digital strategy was either still in development or not a priority.

Fast forward to today and the 2020 iteration of this survey, where the response to that same question might come as a surprise. In this year's survey, conducted in July 2020 through the teeth of the global COVID-19 pandemic, a full 58% of respondents described their institution's digital strategies as either "still in development" or "still to come," **a 48 percent increase from 2016**.

• **OUR ORGANIZATION'S STRATEGY IS** (check all that apply): •
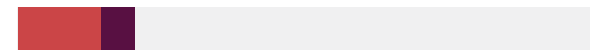
Distinct but related to the institutional strategy

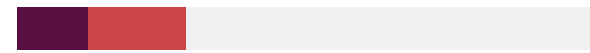Integrated into our institutional strategy
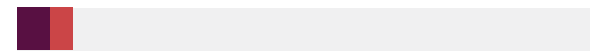
+48%
from 2016 to 2020

Still in development/to come

Not a priority for the institution

Referenced regularly by digital and other practitioners on staff

Lying forgotten and ignored in some drawer
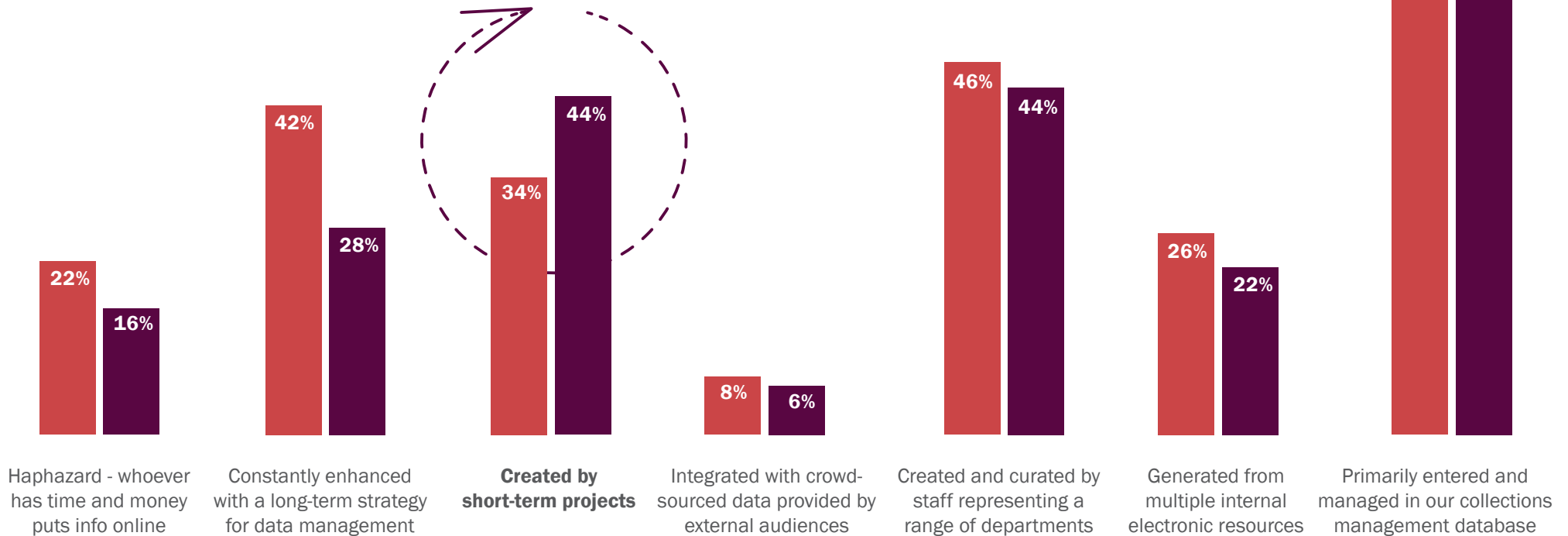
● 2020   ● 2016

Yet it would be a mistake to infer this means digital initiatives aren't moving forward. Rather, cultural institutions are finding that developing and implementing a digital strategy isn't a matter of "one and done." In fact, the deeper cultural organizations get into digital, the more opportunities they uncover to broaden their work – and its impact.

That said, COVID-19 is clearly forcing the issue, with many survey respondents this year citing the ad-hoc nature of their digital effort. 2020 respondents note that content for their collection is "created in bursts and driven by short-term projects," dependent on cyclical funding – a reality for many – rather than part of a structural, strategic embrace of digital at their institution.

• OUR CONTENT FOR THE COLLECTION IS (check all that apply)**: •**

2020   2016

|	2016	2020
Haphazard - whoever has time and money puts info online	22%	16%
Constantly enhanced with a long-term strategy for data management	42%	28%
Created by short-term projects	34%	44%
Integrated with crowd-sourced data provided by external audiences	8%	6%
Created and curated by staff representing a range of departments	46%	44%
Generated from multiple internal electronic resources	26%	22%
Primarily entered and managed in our collections management database	91%	88%

This sense of cultural institutions being reactive vs. proactive in their digital transformation initiatives is underscored in the current survey. We saw a decrease in the percentage of respondents identifying their institutions as innovation "trailblazers" – less than one-third – versus more than two-thirds of respondents who disagreed or were unsure. Additionally, survey respondents showed a decrease in agreement that their organization is supportive when there is grant money, as well as a decrease in those who say they strongly disagree that their organization is risk averse.

> " *We saw a decrease in the percentage of respondents identifying their institutions as innovation "trailblazers" – less than one-third – versus more than two-thirds of respondents who disagreed or were unsure.* "
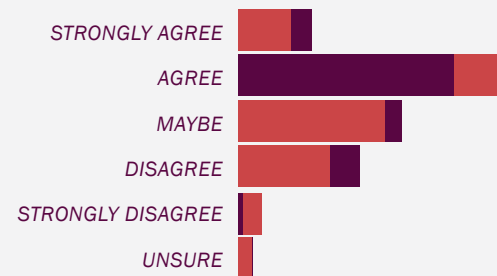
These responses demonstrate a general increase among professionals who feel they and their institutions are in a state of constant flux. We also noted another trend here: little middle ground. Responses accrued at either end of the spectrum suggesting polarization and a strong emotional response to the survey question.

With emotions running high during the pandemic, and change a daily and sometimes hourly constant, it's not surprising to see feelings of uncertainty displayed in the survey responses. Yet there's hope – and power – in numbers. We're in this together, united in our efforts to innovate, share ideas, and subvert the more harmful economic effects of the pandemic.
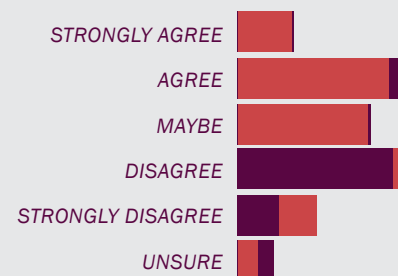
• WHEN ALLOCATING OUR RESOURCES, OUR ORGANIZATION IS: •

● 2020   ● 2016

STRONGLY AGREE
AGREE
MAYBE
DISAGREE
STRONGLY DISAGREE
UNSURE
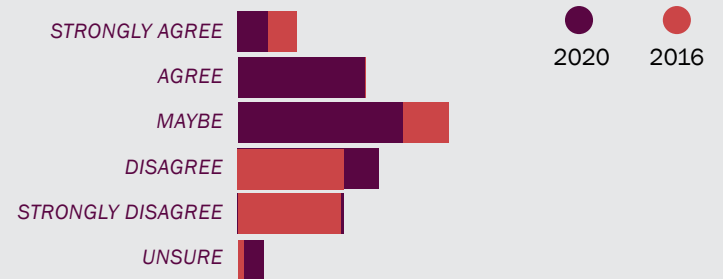
Innovative and will invest significant resources to launch engagements where we are trailblazers

STRONGLY AGREE
AGREE
MAYBE
DISAGREE
STRONGLY DISAGREE
UNSURE

Supportive, but only when experiences are grant funded

STRONGLY AGREE
AGREE
MAYBE
DISAGREE
STRONGLY DISAGREE
UNSURE

Risk averse and commits resources only when presented with proof that other sites have been successful

DIGITAL STRATEGY: A SHIFT FROM 'RELEVANCE' TO 'RESILIENCE'

In the four years since our last survey, questions surrounding digital transformation have shifted from ones of "relevance" – as in, "if we don't embrace digital, will we still *matter*?" – to "resilience" – i.e., "if we don't embrace digital, will we *survive*?"

For example, in its May 2020 report, "Museums around the World in the Face of COVID-19," UNESCO examined the health of museums as the pandemic began to take its toll on the global economy, citing that **90%** of these institutions, or more than **85,000** of them worldwide, had to close temporarily. Worse yet, the agency projected that **more than 10% would not reopen.**

And those that have reopened are struggling. In "America's Art Museums Are in Crisis," the Washington Post finds: "The Museum of Fine Arts in Houston, the first major American art museum to reopen in late May, estimates that its earned revenue... will be down 30 percent.... Since the Cleveland Museum of Art reopened June 30, it has attracted just one-quarter of the visitors it had during the same period last year. The Met estimates it will lose $150 million in revenue from last March through next June."

Europe is in the same boat. The Network of European Museum Organisations (NEMO) found in its Survey on the Impact of the COVID-19 Situation on Museums in Europe that "some museums, especially the larger museums and the museums in touristic areas, have reported a **loss of income of 75-80%, with weekly losses adding up to hundreds of thousands of Euros.**"

Yet against this dark backdrop, there are points of light.

Since the cultural sector is a driver of public wellbeing (more on this later) and economic growth, government and funding bodies quickly responded with COVID relief grants. For example, the UK Government's Cultural Recovery Fund is expected to help "the cultural sector return to pre-COVID levels of growth earlier than expected."

A plethora of advice has surfaced from industry bodies about ways to turn digital initiatives into revenue drivers. CultureConnect hosted a webinar entitled "Revenue Generation For Your Museum During Coronavirus" which demonstrates how strategies from the private sector can help make digital initiatives more profitable.

For example, the Mattatuck Museum in Connecticut brought their revenue-generating April Murder Mystery Event online. They charged $10 to $15 per participant for the Virtual Murder Mystery and gathered over 150 guests from twenty-four states and two countries.
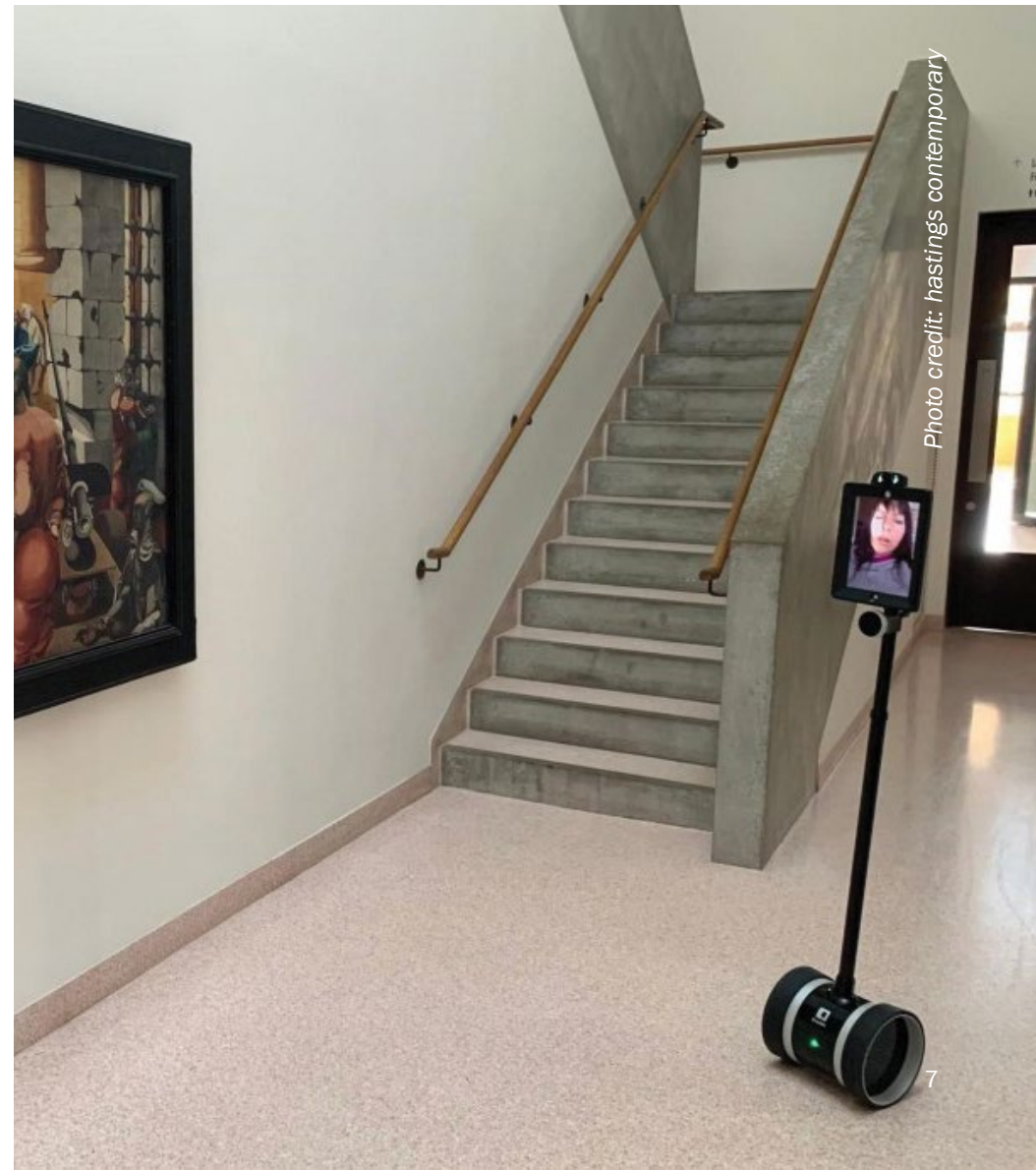

Photo credit: hastings contemporary

COVID-19, THE GREAT DIGITAL ACCELERATOR

Digital innovation has played a key role in keeping many cultural institutions active during national lockdowns. As cultural stewards, these institutions picked up the mantle to address a public starved for connection, socialization, and educational opportunities while in isolation. They accomplished this while threats of furlough and closure loomed.

WORKING REMOTELY

There would be no digital engagement without the staff and infrastructure to support it. Axiell issued a separate customer survey in May 2020 assessing the effects of a cultural sector working from home.

67% of respondents had experienced or were experiencing short term or temporary staff reductions, and 13% permanent staff reductions.

• HAS YOUR INSTITUTION BEEN IMPACTED BY ANY OF THE FOLLOWING? •

| 13%	67%	59%
Permanent staff reductions	Short term/temporary staff reductions	Other cost reduction methods
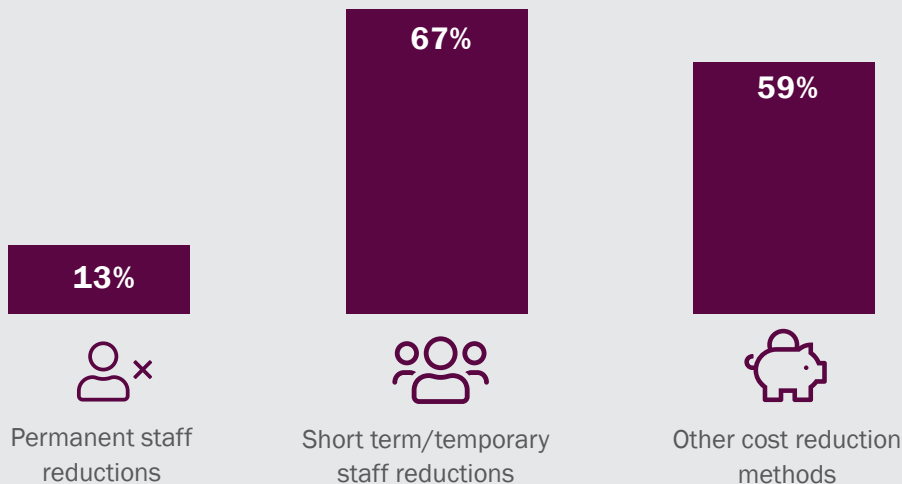
However, in the early weeks of lockdown almost 80% of Axiell customers could access their collections management system (CMS) software remotely and continue working from home.
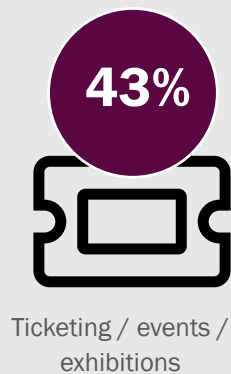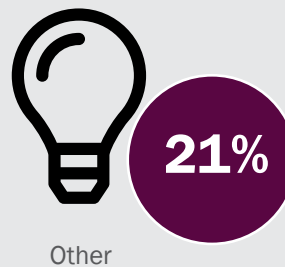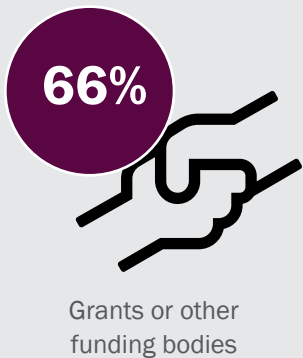
Other responses – found in our Ultimate Museum Grant Guide (Fall 2020) – reinforced the importance of government and grant funding at a time when ticketing revenue streams were drying up.

• ARE YOU CURRENTLY ABLE TO ACCESS YOUR CMS SOFTWARE REMOTELY? •

YES 77%	NO 23%

79%

Government funding

53%

Donations
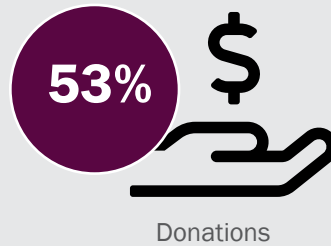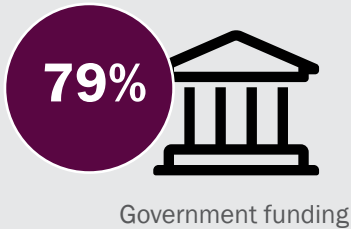
• WHICH FUNDING STREAMS ARE
YOUR ORGANISATION DEPENDENT ON? •

66%

Grants or other
funding bodies

21%

Other

43%

Ticketing / events /
exhibitions

PUBLIC ENGAGEMENT

Culture supports wellbeing by providing public commons, building community, fostering socialization, and giving context to our lived experiences. The Heritage Alliance's 2020 Report, "Heritage, Health and Wellbeing," affirms that heritage organisations support physical and mental health, create community cohesion, and teach new skills to individuals at risk of social exclusion.

During the pandemic, the need for these supports intensified, and cultural institutions took up the charge even while facing restricted resources, personal grief, and the uncomfortable pressure of rapidly heightened digital requirements. Though our survey results demonstrate some institutionalized discomfort with digital transfor-mationand feelings of unpreparedness, the sector's response to the pandemic has been nothing short of heroic.

For example, NEMO, in its earlier-cited survey, found 4 out of 5 museums increased their digital services during the pandemic to reach new or existing audiences, with nearly half of respondents stating their museum is now providing one or more new online services. These new offerings don't have to be difficult, costly, or time-consuming to launch. They can be as simple as posting a collection's objects on social media, offering a virtual tour, or hosting a live-streamed educational seminar. Additionally, 2 out of 5 museums reported an increase in online visits, ranging between 10 to 150%.

" *4 out of 5 museums increased their*

digital services during the pandemic

to reach new or existing audiences **"**

These findings are echoed in the 2020 Axiell/MuseWeb survey, where a full 60% of respondents affirmed their cultural institution is investing in remote museum experiences due to COVID. With the public shut out of attending cultural institutions in person, the call to digital engagement has never been clearer or more pressing.

In fact, over 60% of respondents said "investing in digitizing our collection" is of the highest priority, an increase over 2016, with most other priority areas down from the 2016 mark. With physical access to collections so restricted throughout 2020, it is perhaps no surprise that digitization has accelerated. Also unsurprisingly, improving the physical space was seen as less of a priority for investment.

Additionally, the two highest priority areas for 2020 in terms of investments for the future were **digitizing our content** and **remote museum experiences due to COVID, such as distance learning and virtual programs** (a new question in this year's survey).

In its report, UNESCO identifies several categories of digital-forward initiatives that museums, libraries and archives have embraced throughout the pandemic. We'll highlight the top three:

① **Use of previously digitized sources:** "Many institutions have taken advantage of the digitization and digital communications work done on existing collections (online collections, 360-degree tours, virtual museums, online publications, digital exhibitions) to showcase them more effectively.

② **Digitization of planned activities during the months of lockdown:** Many museums took previously scheduled events and exhibitions and made them interactive digital visits.

③ **Increased activity on social media:** "A number of institutions made the most of lockdown to develop their social media activities (Facebook, Twitter, Instagram) or launch a YouTube or SoundCloud Channel.
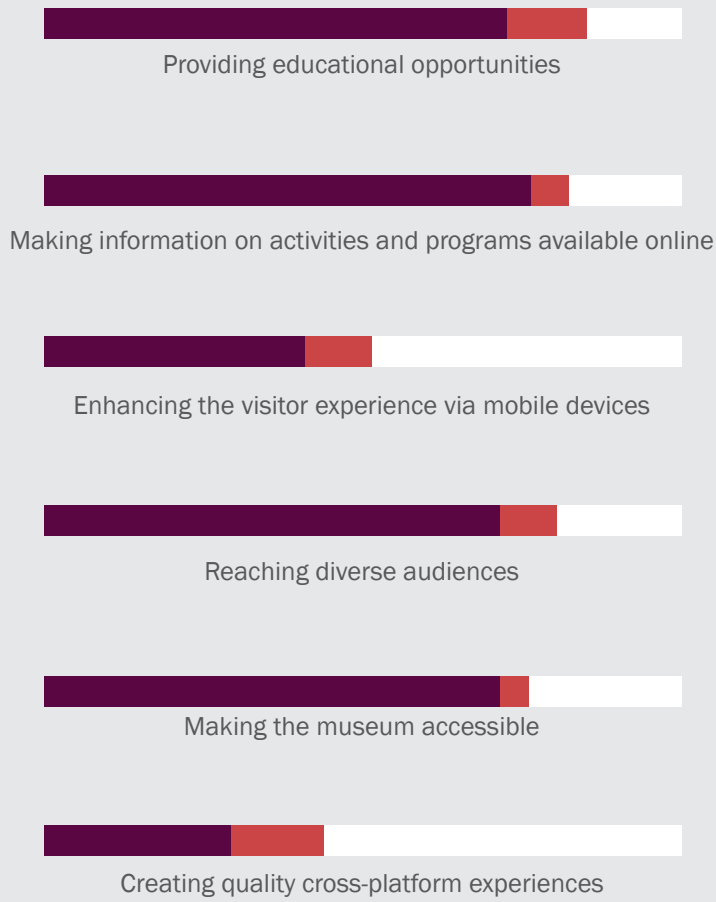
Institutions that were further along in their digital transformation prior to COVID found it easier to adapt to the pandemic and engage their patrons online. That said, some smaller institutions were able to be nimble and adapt quickly to new ways of working, utilizing low cost tools such as social media. And quite often, the collection was at the core of these activities.

If necessity is the mother of invention, then much of that invention needs to be digital. 2020 has proved conclusively that digital is no longer "a nice to have." It has become an essential capability for responding to crises, uncertainty and change – and for reaching audiences around the corner and all over the world, which has only grown in importance.

RECALIBRATION

• OUR PRIORITIES FOR AUDIENCE ENGAGEMENT INCLUDE (check all that apply): •

Providing educational opportunities

Making information on activities and programs available online

Enhancing the visitor experience via mobile devices

Reaching diverse audiences

Making the museum accessible

Creating quality cross-platform experiences

● 2020   ● 2016

When we issued this survey in 2016, we categorized six audience-engagement priorities. In 2020, with the same categories in place, we see an across-the-board decrease in the selection of each option.

What can this decrease mean? We think it is a sign the industry is recalibrating. The needs of audiences have changed dramatically during 2020, and institutions are having to rethink how best to meet them.

Collaborative digital engagement mechanisms such as distance learning, virtual tours/exhibits, and public access have played a central, strategic role in providing continued service during the pandemic. Interactivity and sustainability have emerged as forerunning trends for digital.

Cultural institutions offer boundless and inherent value to society. And though digital transformation means reflecting and evolving, it doesn't mean abandoning core values and a core purpose of educating and enriching the lives of our communities. We're seeing the sector recalibrate to address those values and purposes through digital.

A big part of this recalibration effort hinges on listening. Doing this right requires understanding the needs and behaviours of the audience. This was clearly on display during the pandemic, with many organisations directly soliciting public input on what services they should provide.

As a great example of this, during the pandemic, the UK National Theatre responded to lockdown and digital demand by repurposing their YouTube channel from a marketing mechanism into a platform for public service and engagement.

They launched "National Theatre at Home" – a project to make theatre productions available to home viewers through YouTube. This approach was successful in several ways: it provided a place to host content, it provided a democratic channel through which to talk and engage with audiences, and it provided a way to bring people together. Viewership soared, with over 15 million people tuning in to National Theatre at Home in only 16 weeks.

Let's take a closer look at how other institutions are embracing digital and collaborating with their communities.

DIGITAL IN ACTION: CASE STUDIES FROM AROUND THE GLOBE

GEOLOGISCHE BUNDESANSTALT, AUSTRIA

AN ONLINE GOLDMINE OF GEOLOGICAL DATA

Situated in a beautiful neighborhood in the heart of old Vienna, Geologische Bundes-anstalt (GBA) is known as the geological conscience of Austria. The library is crammed with more than 350,000 yellowing books, hand-drawn maps, letters, journals and theses, some pre-dating 1849, the year the Geological Survey of Austria was founded.

GBA is the second-oldest geological institution in the world, yet in many ways the most modern. Its new database system gives geologists and scientists all over the world direct online access to gems of geological history.

For more on how GBA is bringing its three-centuries-history of geological riches into the digital age, read An Online Goldmine of Geological History.

"*It may sound crazy that we still collect everything in paper form, but unlike floppy disks, tapes and CDs, paper is impervious to the passage of time,*" *said Thomas Hofman, dedicated librarian in charge of GBA's outward flow of information.* "*So when we scan the material and make it searchable in detail in our system via the Internet, we have the perfect symbiosis of old and new.*"

ROYAL ACADEMY OF ARTS, UK

**USING SOCIAL MEDIA TO RAISE SPIRITS AND PUBLIC PROFILES**

Social media – a largely free mechanism for building community, spreading awareness, and capturing attention – was the obvious path forward to continue engaging audiences during lockdown. Adam Koszary, the "Museum World's King of Memes" is known for his viral heritage posts. As the Royal Academy's social media editor, Koszary has spent lockdown engaging social followers with topical jokes and artistic challenges. From March to August 2020, this approach grew the Royal Academy's social media following by tens of thousands.

Koszary warns that simply posting images of an institution's collection is not enough. Social media is more than a sharing platform. It is a storytelling machine that draws from an intricate web of modern culture, public discourse and referential humour (memes).

In an industry that has a reputation for academic formality, institutions like the Royal Academy subvert this perception by leveraging social media as a source of levity and a mechanism for public inclusion. In an interview with the New York Times, Koszary notes that "arts and heritage can't possibly fix coronavirus, but we can try and do something to help the sadness and fear."

> ❝ *... arts and heritage can't possibly fix coronavirus, but we can try and do something to help the sadness and fear.* ❞

Read the full New York Times article, Museum World's King of Memes Brings Humor to Lockdown.
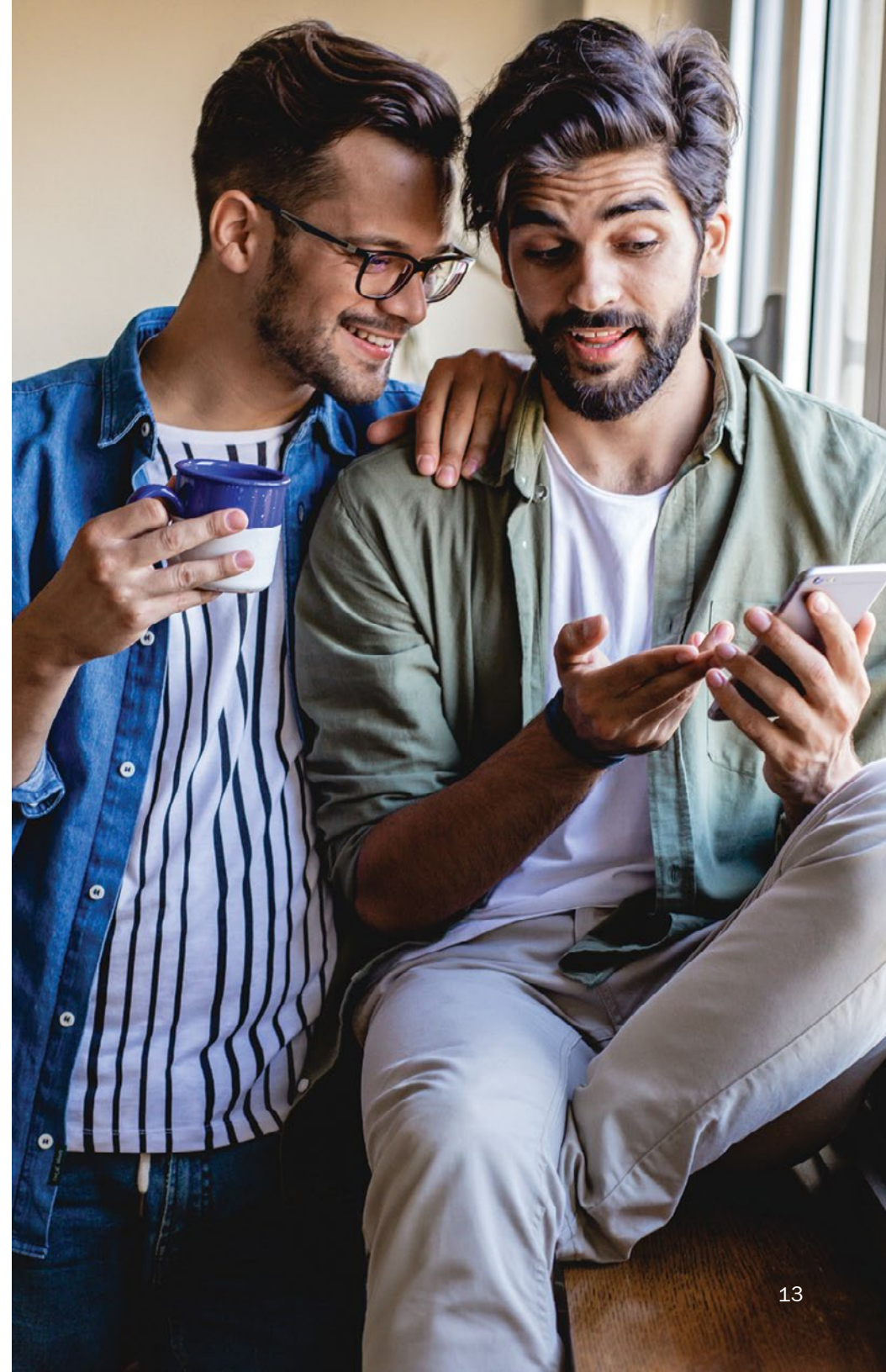
WILTSHIRE MUSEUM, UK

EVOKING REMINISCENCE THROUGH YOUTUBE VIDEOS

In April, during the pandemic, the Wiltshire Museum began publishing free videos to help inspire reminiscence at home. Reminiscence therapy stimulates the senses – taste, touch, sight, smell, and sound – to evoke memories for those with recall difficulties including dementia. Therapists or care partners often use objects to bring forth reminiscence.

In pre-pandemic times, the Wiltshire Museum ran reminiscence sessions with their Handling Collection where audiences could interact with the objects in person. Their Reminiscence at Home program seeks to continue servicing their community online, through YouTube.

With her soothing voice and delightful commentary, Community Curator, Sarah Gregson, produces 3 to 5-minute-long videos that feature objects from the 1940's, 50's and 60's. The videos have inspired viewers to send in photos of their own evocative objects to expand the reach and impact of the program.

> " *Reminiscence therapy stimulates the senses – taste, touch, sight, smell, and sound – to evoke memories for those with recall difficulties including dementia.* "

BELL MUSEUM, USA

MOBILE GUIDE MAKES REOPENING MORE ACCESSIBLE AND IMMERSIVE

When the Bell Museum, Minnesota's official natural history museum and planetarium, celebrated its grand reopening in a new building on the University of Minnesota's St. Paul campus, it did so using a newly launched mobile guide. The mobile guide proved key in serving a wide variety of visitors, providing multi-language content for Spanish, Hmong, and Somali-speaking guests as well as accessible tours for those with low vision or no vision.

Each stop on the tour's 36 points of interest features audio narration, a transcript, and beautiful way-finding images of the exhibit spaces. Every image also includes alt-text, and the design meets accessibility standards from font type to color selection.

In addition to distributing the mobile guide to visitors on their own devices as a web app or through the App Store or Google Play, the Bell Museum also published the mobile guide in offline mode on iPods for visitors to borrow as needed.

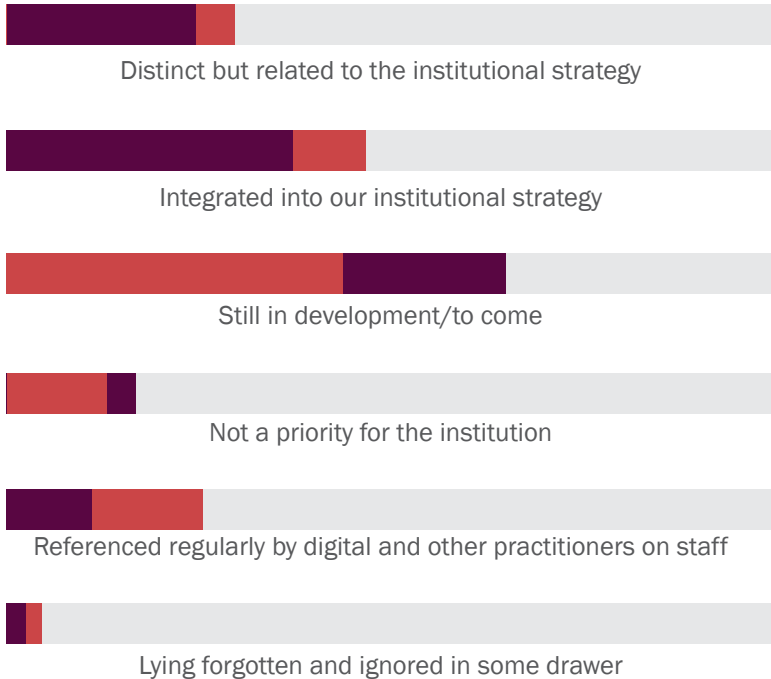# THIS YEAR'S SURVEY DATA: WHO WE TALKED TO AND WHAT THEY TOLD US

Surveys remain a useful, unobtrusive way to tap the insights of an audience at scale. In comparison to the "State of Digital Transformation" survey we conducted in 2016, the percentage of respondents in curatorial and digital information management roles grew in 2020, while those identifying themselves in senior management roles decreased.

This change could account for the single-digit-percentage dip among those feeling their organization's digital strategy is integrated into their institutional strategy and also explain the more dramatic decline in respondents confirming that digital strategy is "referenced regularly by digital and other practitioners on staff."
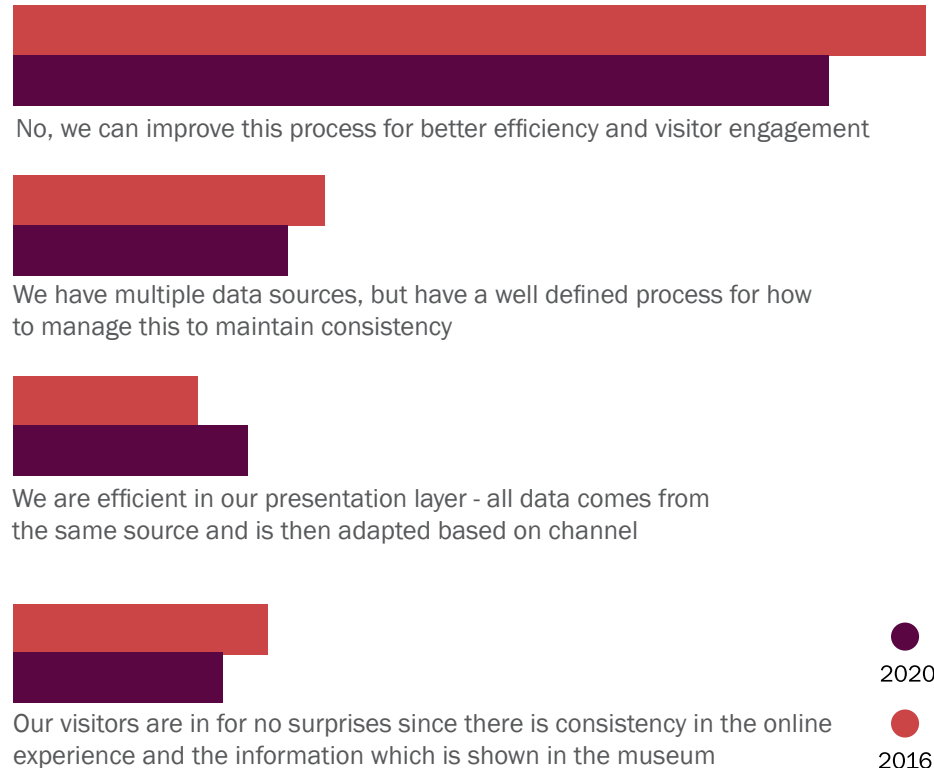
What didn't change is more surprising. Answers to many of the questions assessing the state of a museum's, library's, or archive's digital progress split into the same divide as four years ago, with some organizations just starting their digital journey, the majority somewhere on their way, and a few leaders farther along.

This is telling. Most cultural institutions know that digital is important and will play a strategic role in their audience-engagement strategies of the future. Perhaps this is why respondents report an increase in efficiency of content presentation.

• OUR ORGANIZATION'S DIGITAL STRAGEGY IS (check all that apply): •

Distinct but related to the institutional strategy

Integrated into our institutional strategy

Still in development/to come

Not a priority for the institution

Referenced regularly by digital and other practitioners on staff

Lying forgotten and ignored in some drawer

• OUR PRIORITIES FOR AUDIENCE ENGAGEMENT INCLUDE (check all that apply): •

No, we can improve this process for better efficiency and visitor engagement

We have multiple data sources, but have a well defined process for how to manage this to maintain consistency

We are efficient in our presentation layer - all data comes from the same source and is then adapted based on channel

Our visitors are in for no surprises since there is consistency in the online experience and the information which is shown in the museum

2020
2016

16

With the acknowledgement that digital is a necessity for the future, perhaps cultural institutions are laying down a foundation for digital transformation to pave the way for future innovation. Solid documentation practices and a digitization plan are a necessary first step. Cultivating robust CMS data and clear priorities about what content to digitize makes the following steps, such as publishing collections online, integrating with other tools and sharing data, easier and more effective.
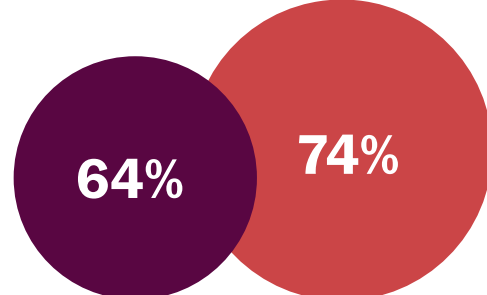
• **OUR MUSEUM HAS A STRATEGY FOR HOW WE WORK WITH DIGITAL MEDIA AND IMAGES** (check all that apply): •
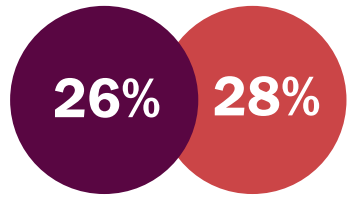
24% **16%**
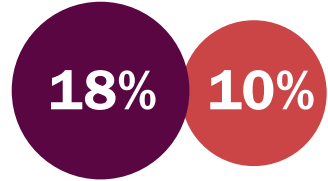I do not know
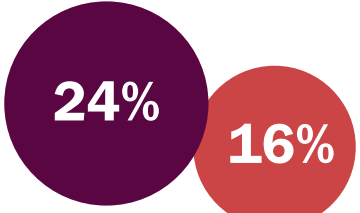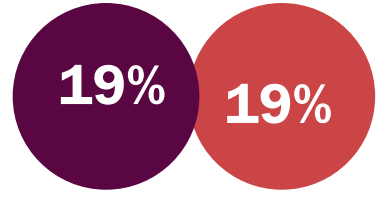
19% **19%**
We have a distinct strategy for managing metadata and adhere to industry standards

64% **74%**
We have multiple data sources for digital media and images

26% **28%**
All departments leverage the same data source for digital media and images

18% **10%**
It is a smooth process for us to enrich the data for our digital media and share it online

● 2020   ● 2016

17

A FUNNY THING HAPPENED ON THE WAY TO MOBILITY

While we live in an increasingly mobile world, cultural institutions are proceeding with some caution. In this year's survey, we found a 70% decrease in the number of respondents saying smart phones and tablets are a "core part" of their digital strategy.

This is in keeping with an influential post by Colleen Dilenschneidert, "Musing on a Mobile App for Your Cultural Organization? Read This First," last updated in 2019, which found, among other things: "...that more people used mobile applications offsite than onsite if they used them at all – an interesting finding as most cultural organization applications were built to be used to enhance the onsite experience."

Vendors such as CultureConnect, recently acquired by Axiell, are more bullish. In "Busting 3 Common Myths about Digital," the mobile-application leader counters that successfully launching mobile apps, kiosks, and other interactive digital projects doesn't need to be expensive or require great tech savvy and ongoing maintenance. With the right platform, connecting with audiences onsite, online and through their personal devices can be a simple, quick-to-deploy virtual programming initiative with an enticing ROI.

• IN THE MUSEUM, WE LEVERAGE TECHNOLOGY SUCH AS SMARTPHONES & TABLET PC'S TO ENGAGE OUR VISITORS
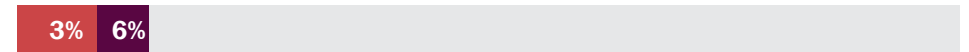(check all that apply): •

● 2020   ● 2016

70% decrease between 2016 & 2020

9% | 30%
This is a core part of our digital strategy

32% | 42%
We have not started yet
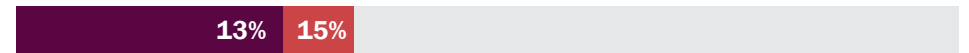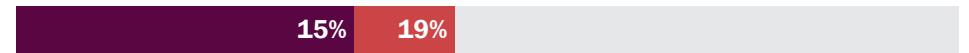
3% | 6%
We are satisfied with our solutions and see no need for development

35% | 36%
We are increasing our investment to ensure that visitors can use their own device

13% | 15%
The visitors will get the best experience by using one of our guided tours on a rented device for a complete experience

15% | 19%
The guide is contextual: the visitors can interact with the exhibition information screens and actions taken by the visitor impact the experience

20% | 26%
Yes, visitors can use their own device as a complete guide

18

DIGITAL TRANSFORMATION: A PATH FORWARD

With so much data suggesting that COVID has spurred new digital activity, including UNESCO's finding of 600+ such examples (in earlier-cited report), it's easy for some cultural institutions to feel like they are on the outside looking in. If you are such an institution, don't despair. As our survey has shown, you are not alone. More importantly, help, including in the form of grants, is widely available for wherever you are in your digital journey.

WHERE ARE YOU NOW IN YOUR DIGITAL TRANSFORMATION JOURNEY, AND HOW CAN YOU ADVANCE TO THE NEXT STAGE?

In Where Does Your Company Fall on the Digital Transformation Spectrum, cloud services provider OBT maps out stages in digital transformation. Using this framework, cultural institutions can see where they are on their current journey and, more importantly, how they can move forward.

Again, for those of you who haven't taken the digital plunge, take heart. The more organizations "learn by doing" with digital, the less they are seeing themselves as "trailblazers" and more as "open minded" to digital possibilities. That could easily be you by the time of our next survey!

RIGID

DEFINITION: You continue to operate with legacy systems and processes.

FAST FACTS FROM AXIELL 2020 SURVEY: 58% of respondents indicated their organization's digital strategy is still in development/to come – that's up from 37% in 2016 – a 57% increase

RIGID → EXPERIMENTAL: Acknowledge that digital transformation is a necessary disruption.

EXPERIMENTAL

DEFINITION: You are not afraid to dabble in digital.

FAST FACTS FROM AXIELL 2020 SURVEY: 38% of respondents indicated that content for the collection is created in bursts and driven by short-term projects. 24% said content is constantly enhanced with a long-term strategy for data management. These numbers were 27% and 35% respectively in 2016 showing less planned and more sporadic content creation.

EXPERIMENTAL → INTENTIONAL: Concretely align objectives of digital initiatives with larger organizational goals. An ROI case like this one we created for a CMS can build off data from experimental initiatives and explain potential benefits of scaling digital efforts.

INTENTIONAL

DEFINITION: You are beginning to accept and embrace digital, adopting a process for getting there.

FAST FACTS FROM AXIELL 2020 SURVEY: 20% of respondents indicate they are efficient in their content presentation with data coming from the same source and adapted based on channel. That number increased from 14% in 2016. In addition, 55% of respondents are prioritizing investment in digitizing their collection, up from 49% in 2016.

INTENTIONAL → STRATEGIC: Collaborate with other groups and share outcomes to scale up successes. Can something you tried work for another group or department? Can you host an internal webinar describing your outcomes? Can you add a 5-minute recap to the next company meeting? How can you generate interest internally in your successes and create ripple effects across the organization and enhance digital adoption?

STRATEGIC

DEFINITION: You are living digitally.

FAST FACTS FROM AXIELL 2020 SURVEY: Only 10% of respondents said their organization's digital strategy is referenced regularly by digital and other practitioners on staff. That's down from 22% in 2016, a 55% drop.

STRATEGIC → DEDICATED: Create sustainable innovation. We had less managers participate in the survey this year. For staff on a lower rung of the organizational hierarchy, it can feel daunting or out of reach to make digital a dedicated part of the institution. Create buy-in by highlighting the foundation created in the previous phases.

DEDICATED

DEFINITION: You have institutionalized digital with dedicated teams.

FAST FACTS FROM AXIELL 2020 SURVEY: In 2016, 9% of respondents said it was a smooth process to enrich the data for their digital media and share it online. That number has climbed to 16% in 2020, a 78% increase.

DEDICATED → FLUID: Adopt an agile frame of mind and build with/choose flexible solutions as the framework for your digital infrastructure. As our survey results show, organizations constantly need to rearrange priorities based on a myriad of internal and external influences. Once you've got a good handle on what works for your organization, you'll have a greater foundation from which to embrace constant change and evolution.

FLUID

DEFINITION: You have developed a thriving digital innovation culture.

FAST FACTS FROM AXIELL 2020 SURVEY: Almost 50% of respondents agreed or strongly agreed that their organization was only supportive in allocating resources to new initiatives if the project is grant funded, suggesting a fluidity to taking on digital projects when resources become available. Also, 50% of respondents also agree or strongly agree that they are in a constant state of flux with resources that are unpredictable.

FLUID → MASTERS OF THE UNIVERSE: You get the picture.

CONCLUSION

Axiell, with the ongoing help of MuseWeb, has now conducted several surveys on digital transformation in the cultural sector. Each has shown that museums, galleries, libraries, and archives are making progress in their digital efforts without a majority going "all in" on their digital futures. Rather, the sector conforms to the innovation leader/laggard dichotomy found in most industries.

> **"** *Each has shown that museums, galleries, libraries, and archives are making progress in their digital efforts without a majority going "all in" on their digital futures.* **"**

The question then is whether laggards in digital transformation can and should be more correctly categorized as "fast followers," those who learn first from their own successes and failures, and those of others, before accelerating towards their digital futures.

Our hope for the industry is the latter, particularly in light of COVID-19, where the need to meet customers on their own terms is no longer just a "nice to have," but instead essential to near-term survival and long-term prosperity.

But what will happen when COVID-19 runs its course and tourists and crowds return? Won't the unique collections and physical experiences offered by the world's cultural institutions win the day again?

We certainly hope they do.

But museums, libraries, galleries and archives would be mistaken to view this as a binary, either/or proposition. Yes, people crave physical access and connection – there will always be an audience for well-put-together live exhibitions.

Yet a growing generation of potential museum goers, the industry's prospects, like to consume media and information digitally. Offering this generation an engaging, immersive cultural experience across physical and digital channels needs to be our sector's bullseye, both for seeding interest in the amazing vistas cultural institutions offer and converting that interest into ongoing patronage through electrifying delivery.

axiell

Thanks to MuseWeb for collaborating with us on this report.

Request more info
If you'd like to learn more about Axiell and the solutions we offer, please get in touch:

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