

Mobile survey

May 2012

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Goals

- To establish a multi-country museum study to assess how cultural organisations are using mobile technology to:
 - Extend audience reach
 - Increase visitor engagement and participation
 - Provide potential new revenue channels
- To provide insight into how mobile strategies are evolving.
- To provide intelligence to inform the development of museums' short and long-term mobile plans.

Methodology

- The study was carried out in February and March 2012 through an online survey.
- The survey was sent to MA members via email.
- In total 471 surveys were collected from MA members, representing more than 386 museums.
- A free place at the 2012 MA Conference was offered to members as a survey incentive.

Respondent profile

Museum role

- Curatorial 31%
- Education 18%
- CEO/Director 10%
- Visitor services 9%
- PR/Marketing 8%
- Volunteer 7%
- IT/Web 6%
- Interpretation 6%
- Trustee 3%
- Visitor research 1%

Museum type

- National 14%
- Local authority 33%
- Independent 28%
- Volunteer 5%
- Historic site 7%

Museum visitors

- Under 50K: 44%
- 50K to 100K: 12%
- 101K to 250K: 6%
- 250K to 500K: 11%
- Over 500k: 28%

Executive summary

Overall, respondents are enthusiastic about how mobile technology can increase engagement among visitors and introduce their brands and collections to a wider audience on and off-site.

- Nearly half of UK museum respondents offer mobile platforms
 - 9% only offer traditional museum-provided mobile devices.
 - 14% offer both traditional museum-provided mobile devices and new mobile features, such as QR codes and smartphone apps.
 - 23% only offer new mobile features.

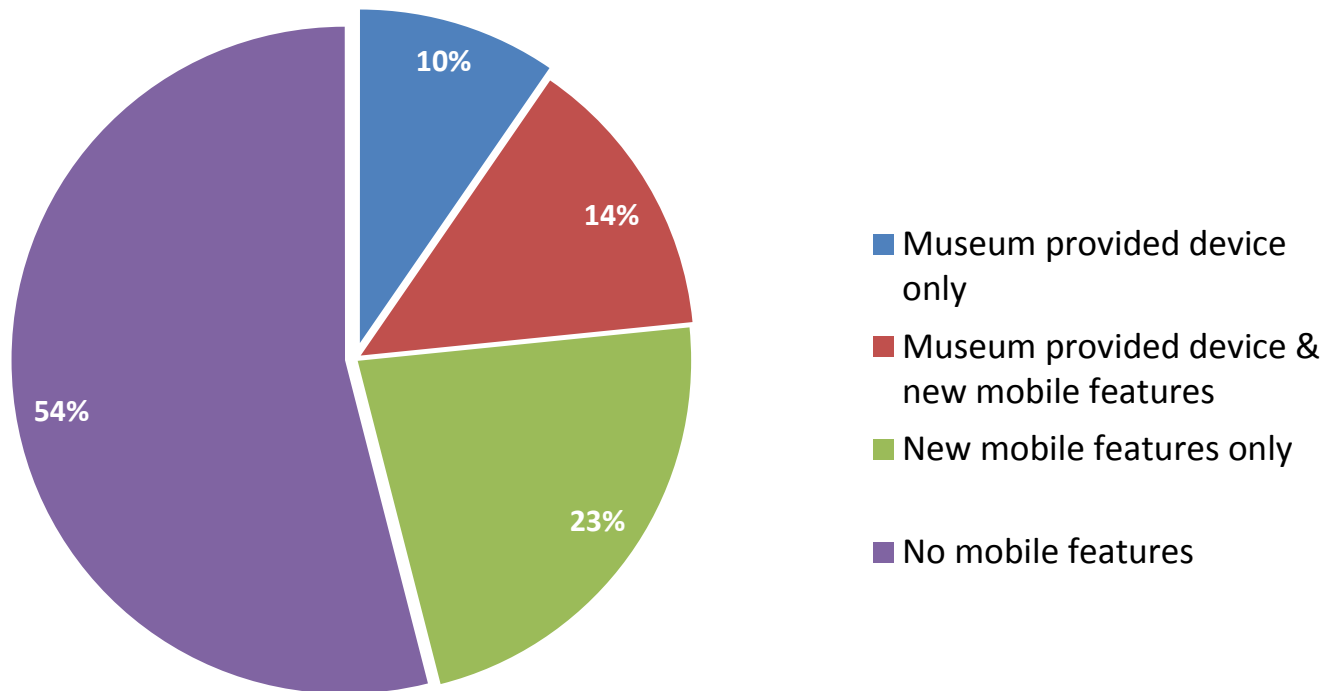
Executive summary

- The most popular new mobile feature among respondents require visitors to use their own mobile device.
 - QR codes (22%) top the list of mobile features used in respondent museums, followed by museum-provided audio tours (18%) and smartphone apps (12%).
- Although visitor engagement is an essential goal of mobile programmes, marketing and visitor demand are important secondary goals.
 - Museums who already offer newer mobile technology to visitors are more likely to want to take advantage of the full potential of mobile.
- Half of museum respondents do not offer any mobile features, citing the lack of dedicated budget, limited resources and knowledge as reasons.

Executive summary

- Knowledge about mobile technology is a key factor in increasing mobile technology adoption across the sector.
- Despite the many barriers facing mobile technology adoption the future of mobile in museums is bright.
 - One quarter of respondents not currently offering mobile plan to introduce a mobile feature in 2012.
 - Half of respondent museums already offering mobile plan a new mobile launch and two thirds plan to expand existing mobile features in 2012.
- Further usage of visitors' personal devices is expected to explode in 2012.
 - Although about half of respondents believe usage of museum-provided devices will grow in the next 12 months, the vast majority see the usage of visitor mobile devices increasing in 2012.

Nearly half of museums offer mobile

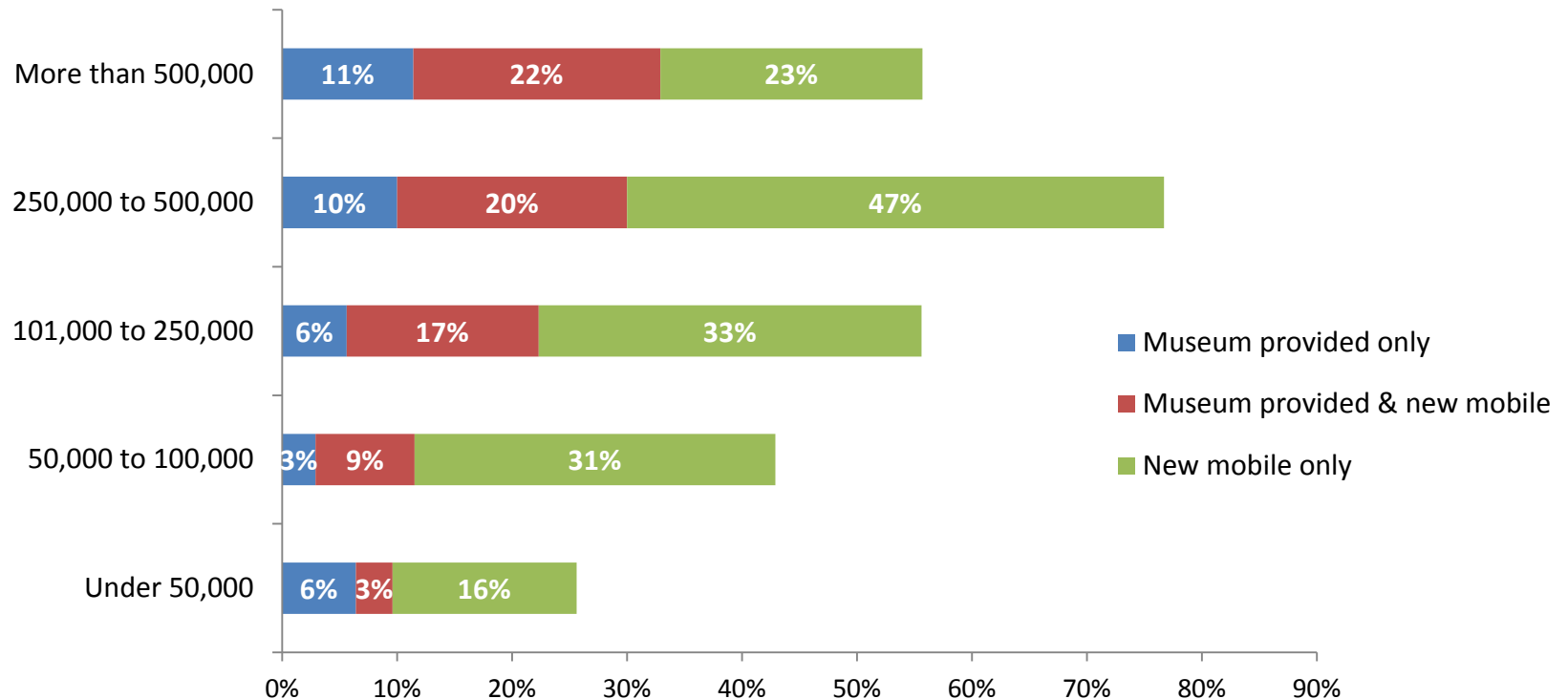


Q. What mobile technologies does your museum currently provide to visitors? (Mobile technologies include handheld devices provided by the museum or visitors' personal devices, such as mobile phones, which enable access to the museum, its collections, or other forms of engagement.)

Size doesn't matter for mobile application

While museum-provided mobile platforms vary depending on visitor numbers, new mobile features are not directly related to museum size.

Visitor figures: mobile features

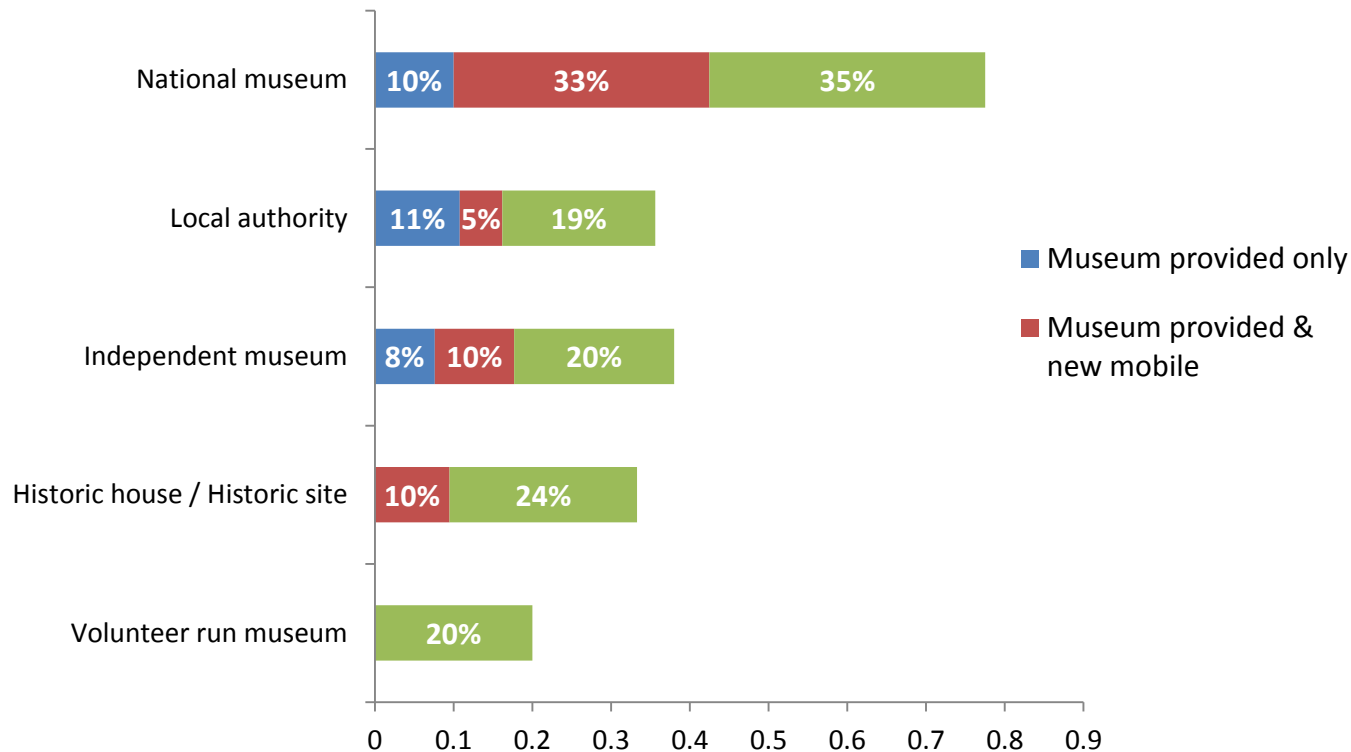


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Mobile is offered across museums categories

One in five non-national museums offer some level of new mobile features

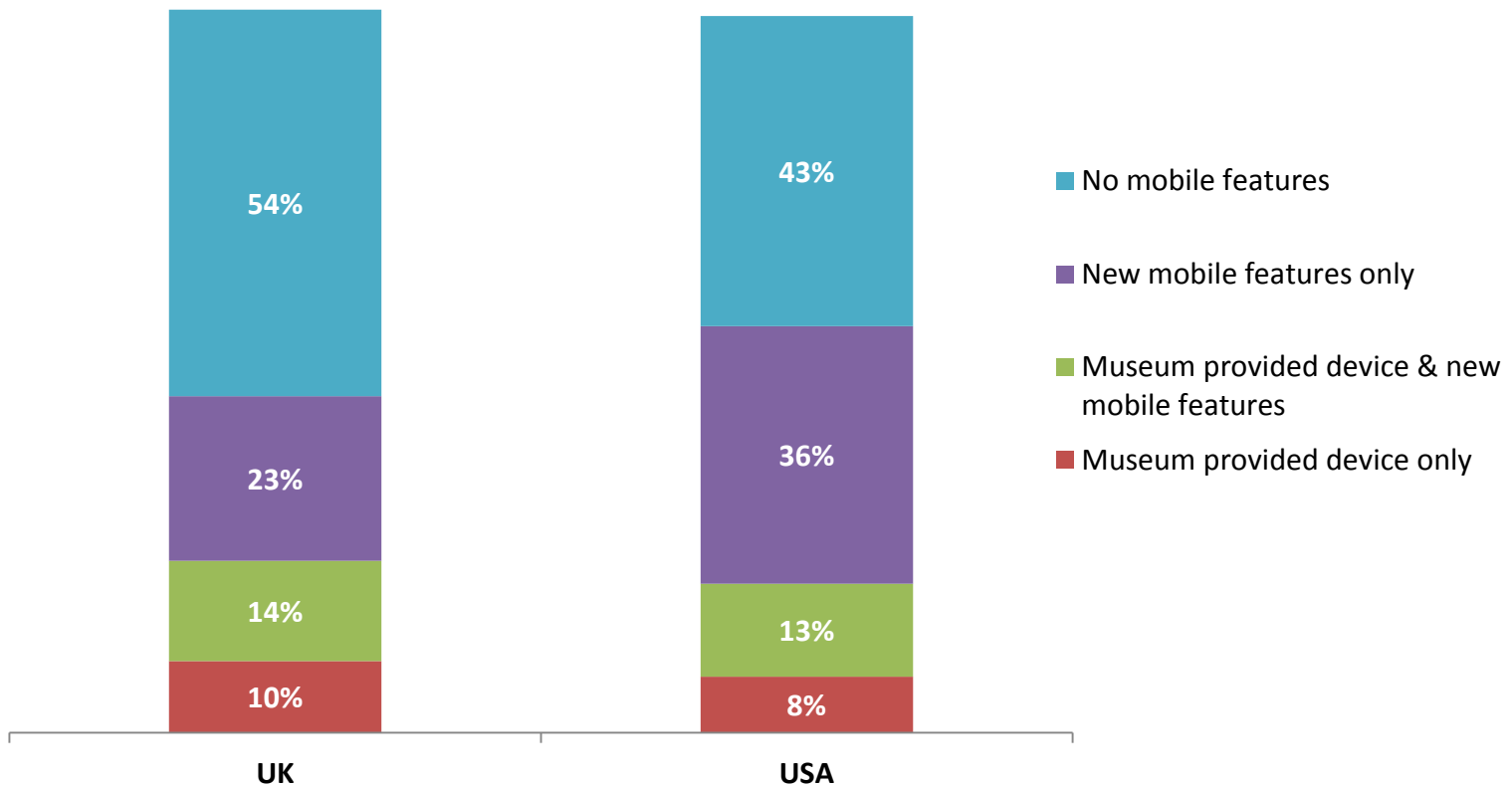
Visitor traffic by mobile features



Q. What mobile technologies does your museum currently provide to visitors? (Mobile technologies include handheld devices provided by the museum or visitors' personal devices, such as mobile phones, which enable access to the museum, its collections, or other forms of engagement.)

UK and US have similar levels of mobile adoption

Although UK and US museums have similar level of museum provided devices, the US is further ahead in new mobile features.

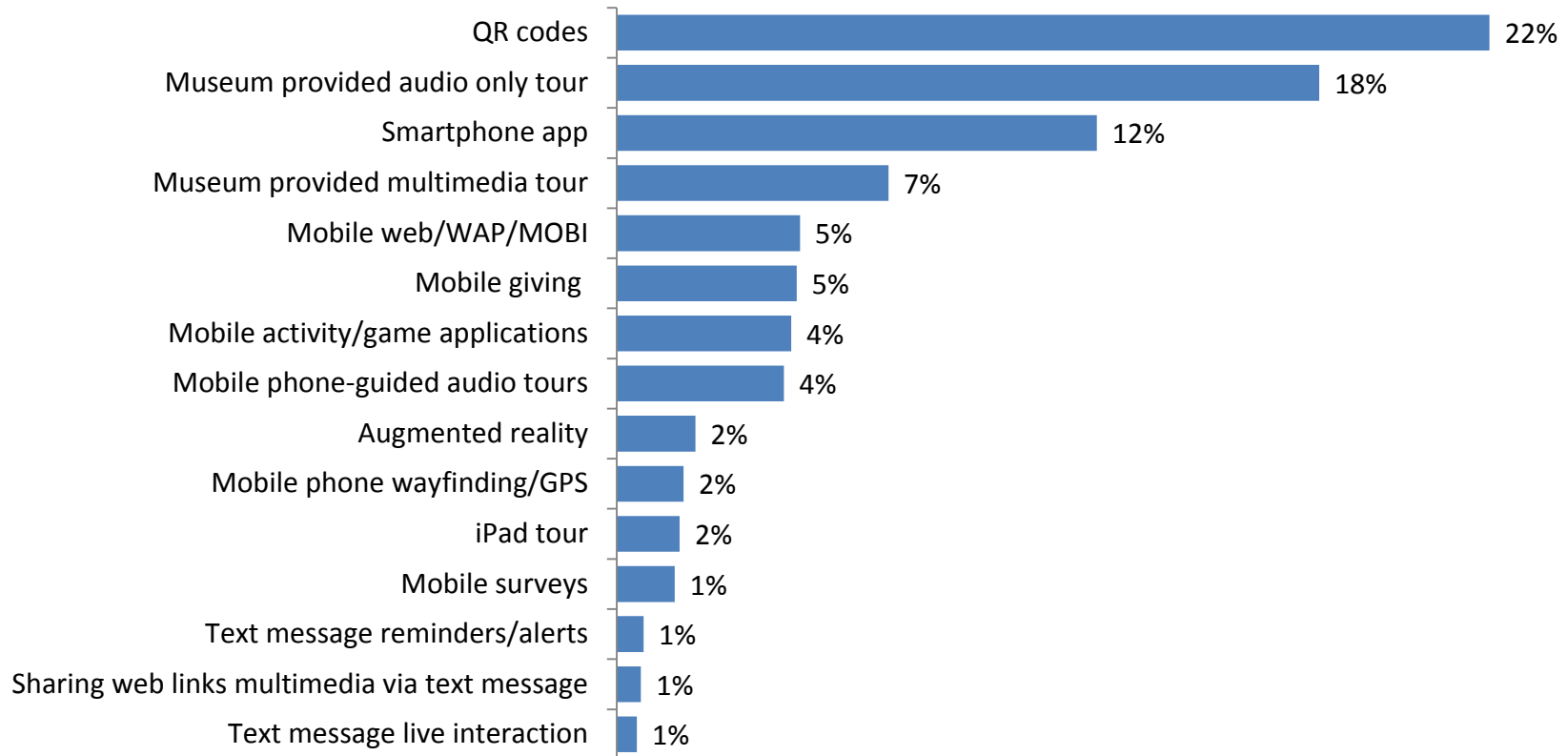


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QR codes top the UK museum mobile list

QR codes are the most popular mobile feature among UK museums, followed by traditional audio tours and smartphone apps.

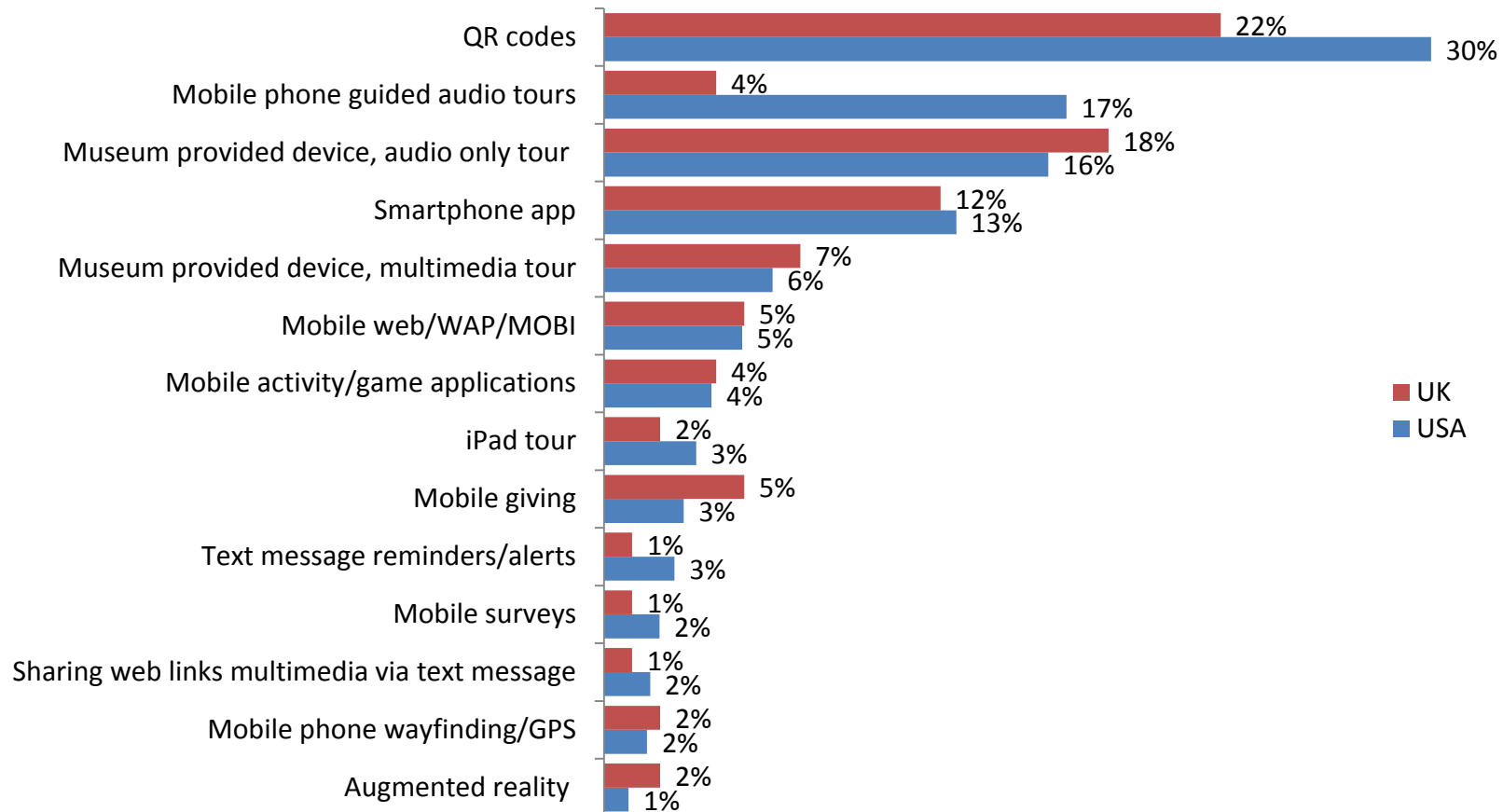
2012 UK museums' mobile offerings



Q. What mobile technologies does your museum currently provide to visitors? (Mobile technologies include handheld devices provided by the museum or visitors' personal devices, such as mobile phones, which enable access to the museum, its collections, or other forms of engagement.)

US museums are more likely to offer QR codes and mobile phone audio tours than UK peers

UK museums are slightly more likely to offer audio tours and mobile giving.

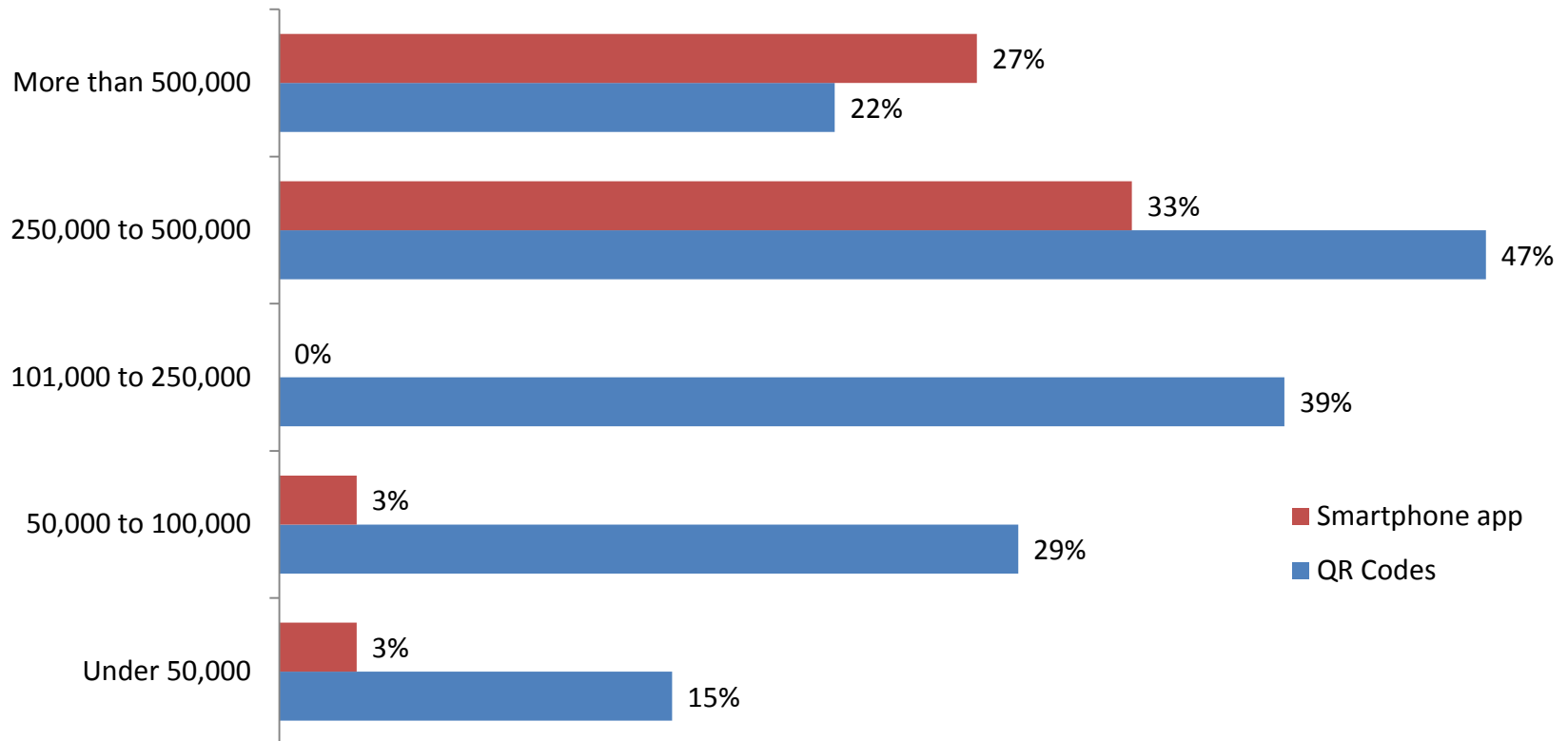


Q. What mobile technologies does your museum currently provide to visitors? (Mobile technologies include handheld devices provided by the museum or visitors' personal devices, such as mobile phones, which enable access to the museum, its collections, or other forms of engagement.)

QR codes are most likely mobile feature offered by mid-sized UK museums

Unlike smartphone apps, QR codes appeal across small and mid-size museums.

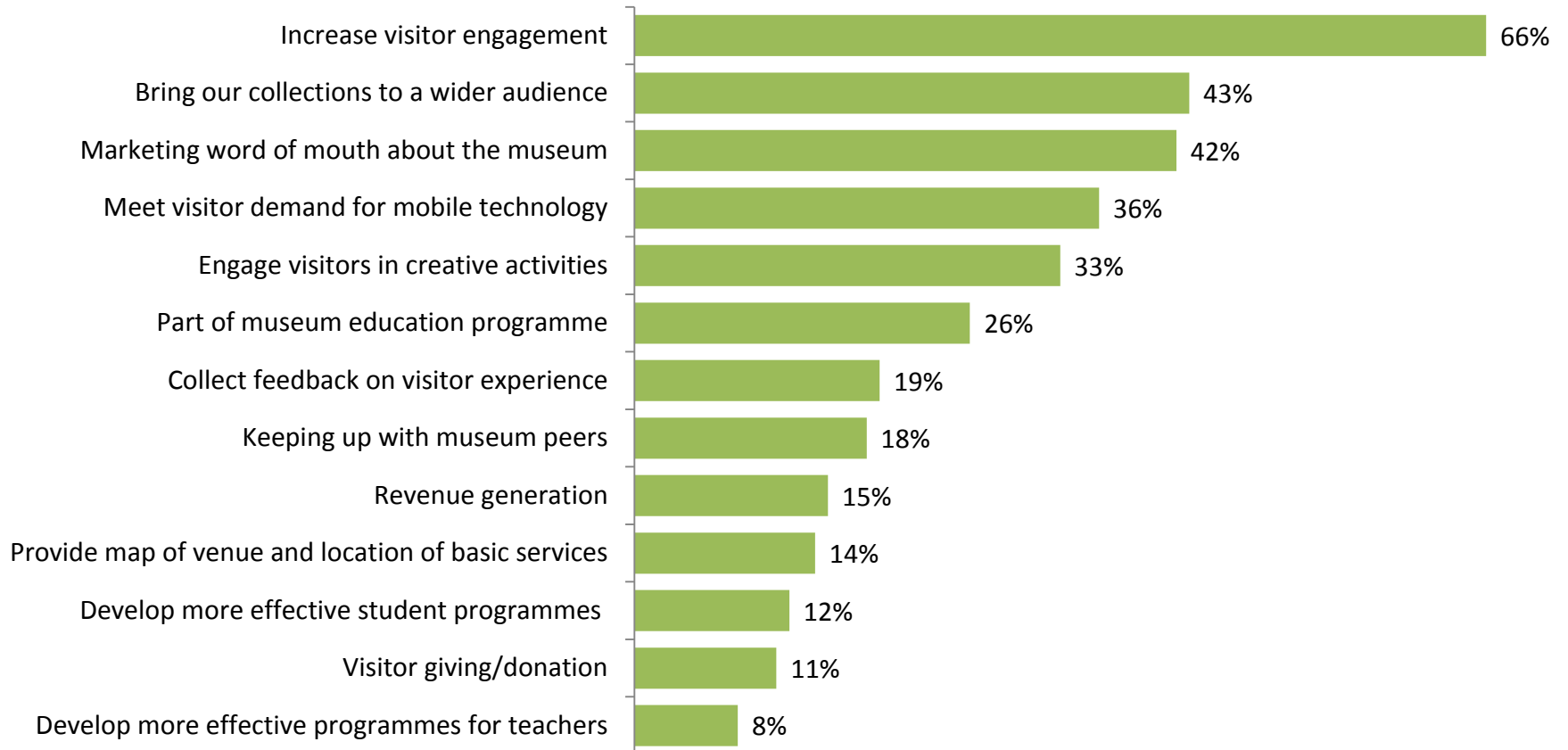
Visitor numbers: mobile feature



Q. What mobile technologies does your museum currently provide to visitors? (Mobile technologies include handheld devices provided by the museum or visitors' personal devices, such as mobile phones, which enable access to the museum, its collections, or other forms of engagement.)

Increased engagement is a key mobile goal in UK

Goals of mobile programmes



Q. What are the goals of your mobile programmes? (Select all that apply)

Museums offering new mobile features are more likely to take full advantage of the potential of mobile

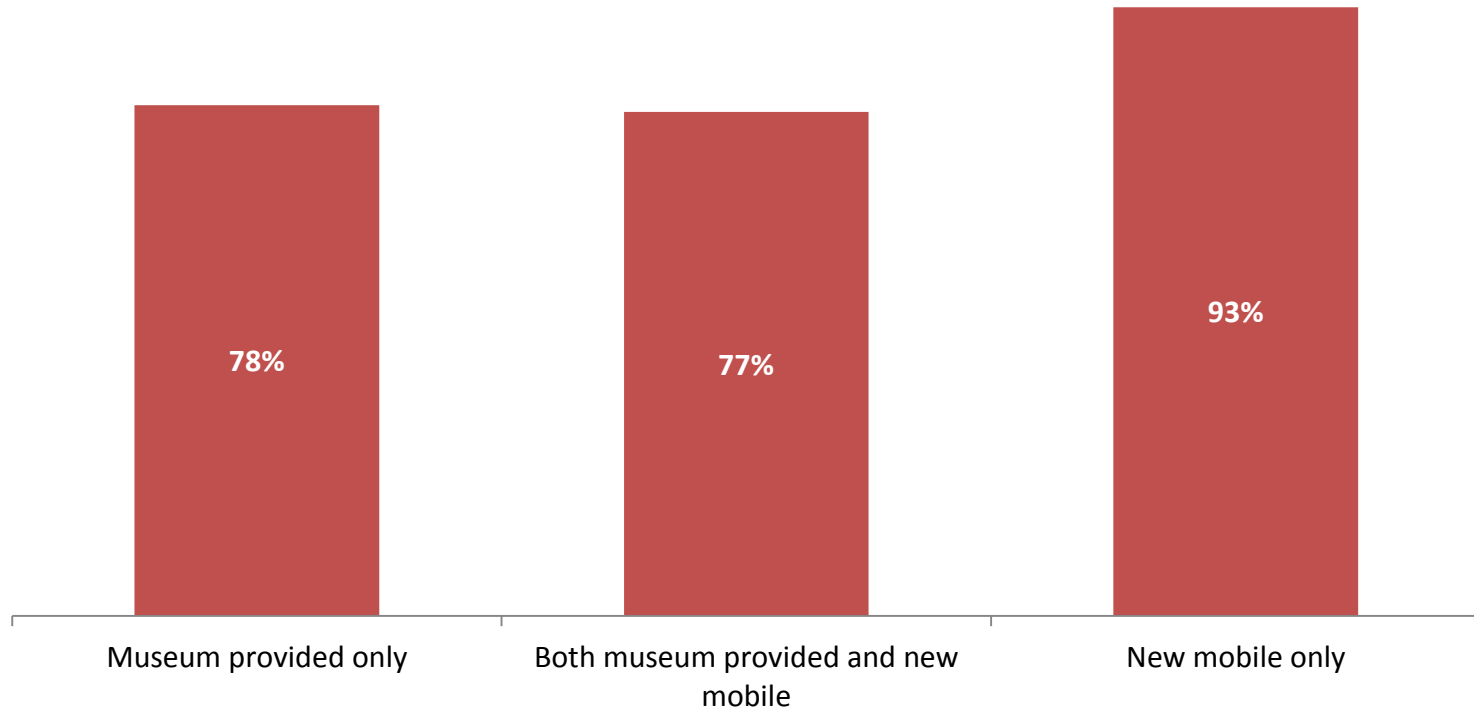
Mobile goals	Museum-provided only	Both museum-provided and new mobile	New mobile only
Increase visitor engagement	60%	81%	70%
Bring collections/programmes to a wider audience	17%	57%	46%
Marketing/word-of-mouth about the museum	14%	51%	45%
Meet visitor demand for mobile technology	29%	48%	41%
Engage visitors in creative activities	24%	36%	35%
Part of museum education programme	33%	35%	22%
Collect feedback on visitor experience	10%	25%	21%
Provide map of venue and location of services	5%	21%	17%
Revenue generation	17%	23%	9%

Q. What are the goals of your mobile programmes? (Select all that apply)

The majority of museums manage their mobile programmes in-house

New mobile only museums are more likely to manage their mobile programmes in-house.

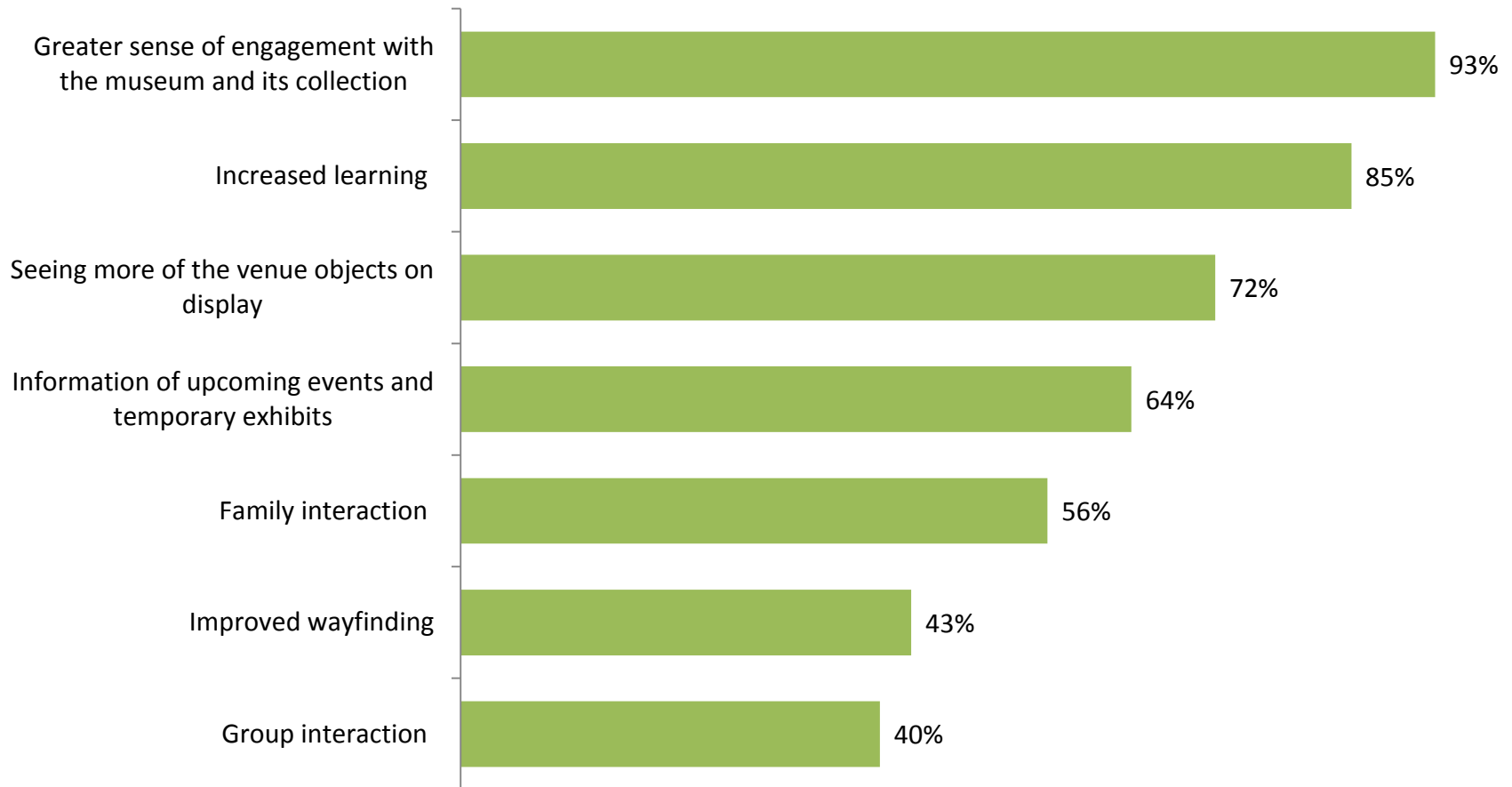
Percentage of mobile programmes managed in-house



Q. What percentage of your mobile programme resources are managed in-house

Ultimate mobile outcomes focus on “depth and breath”

Ultimate mobile programme outcomes

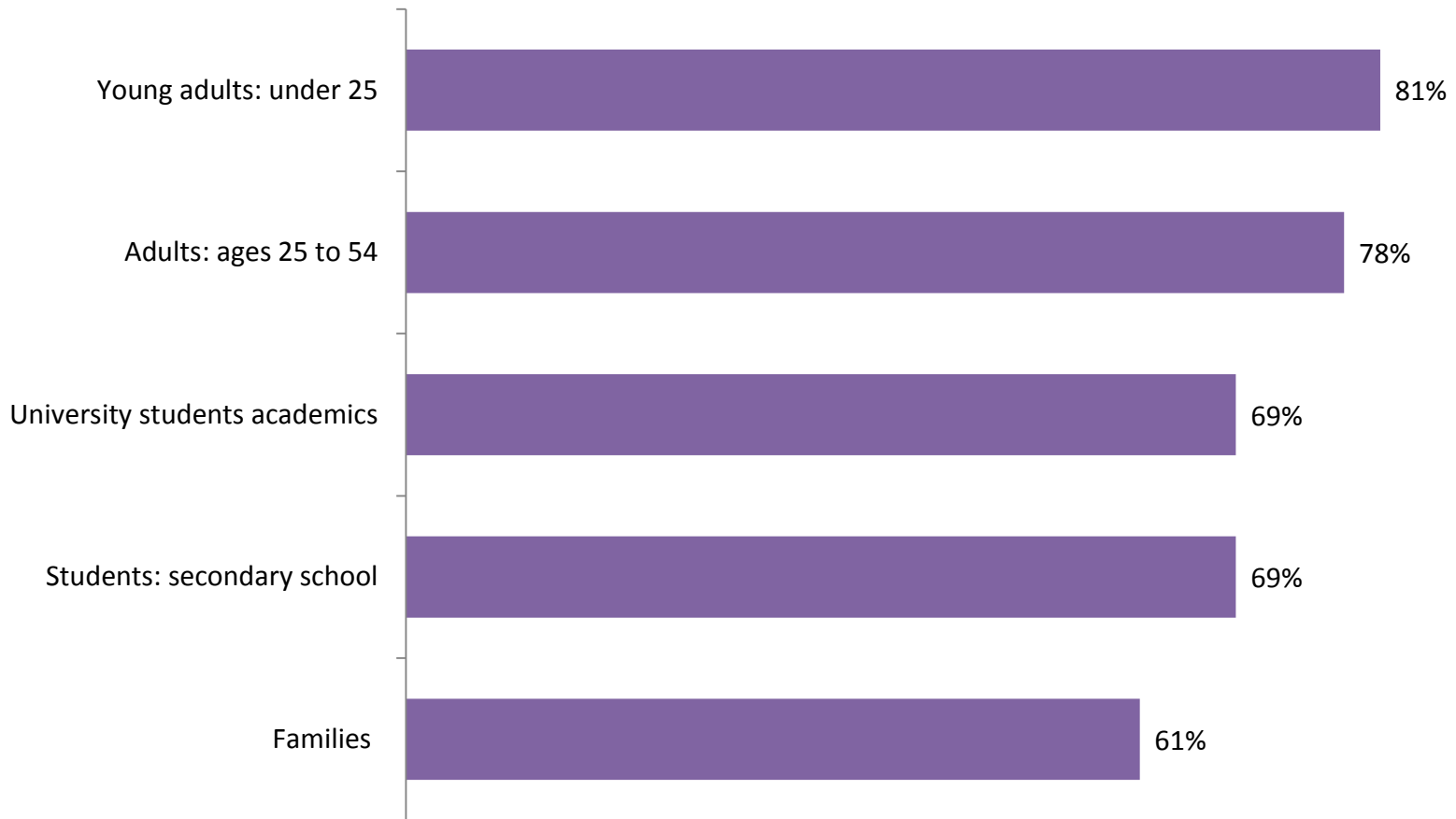


Q. Ultimately, what would you want your visitors to do/get out of mobile programme(s)/future mobile programme(s)? (Select all that apply)

Mobile programmes target general audiences

Families are also an important target audience.

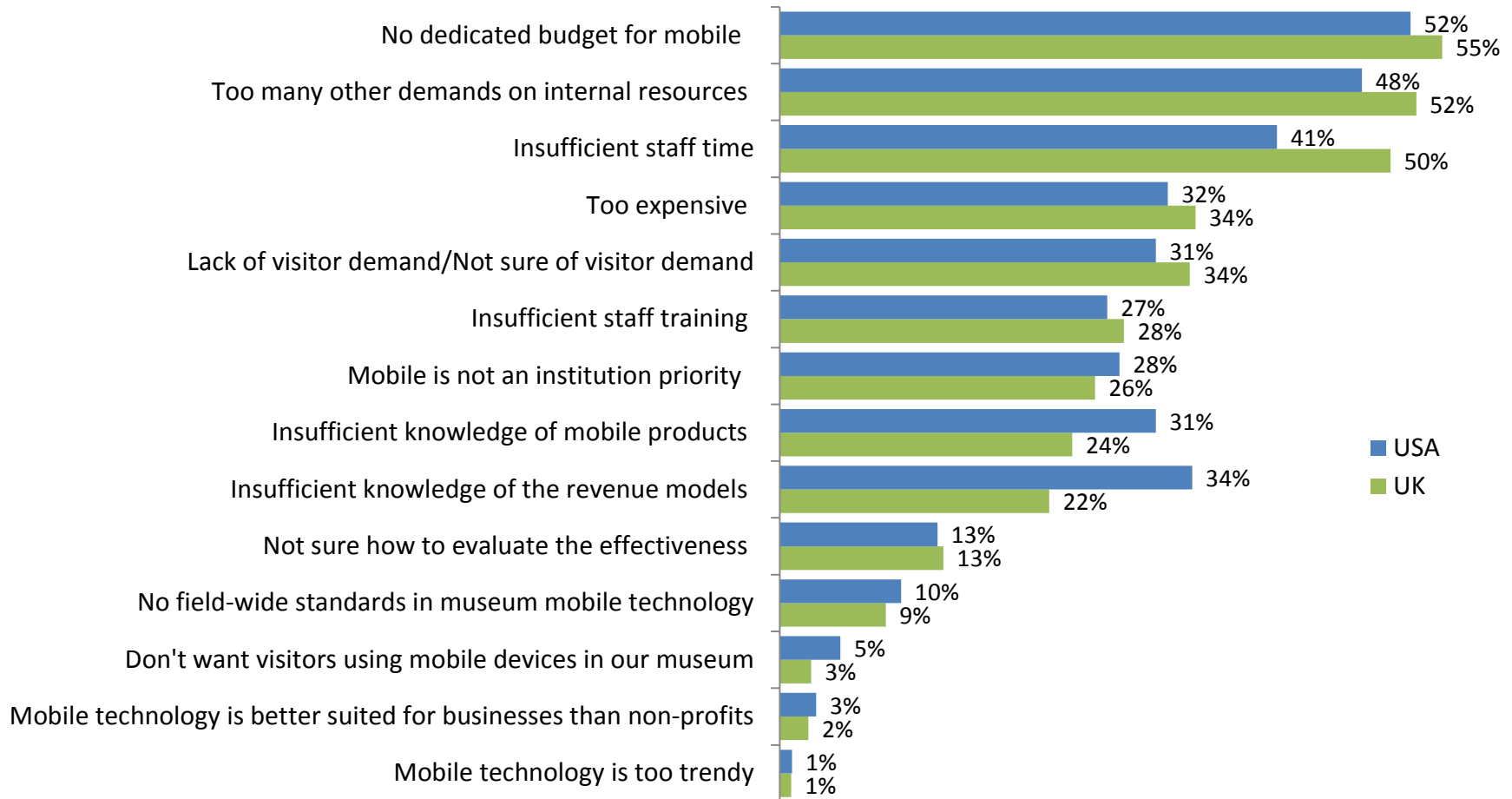
Target audience



Q. What demographic groups would you most like to target with mobile technology programme(s)? (Select all that apply)

Lack of dedicated budget and limited resources barriers for museums not offering mobile features

UK versus US

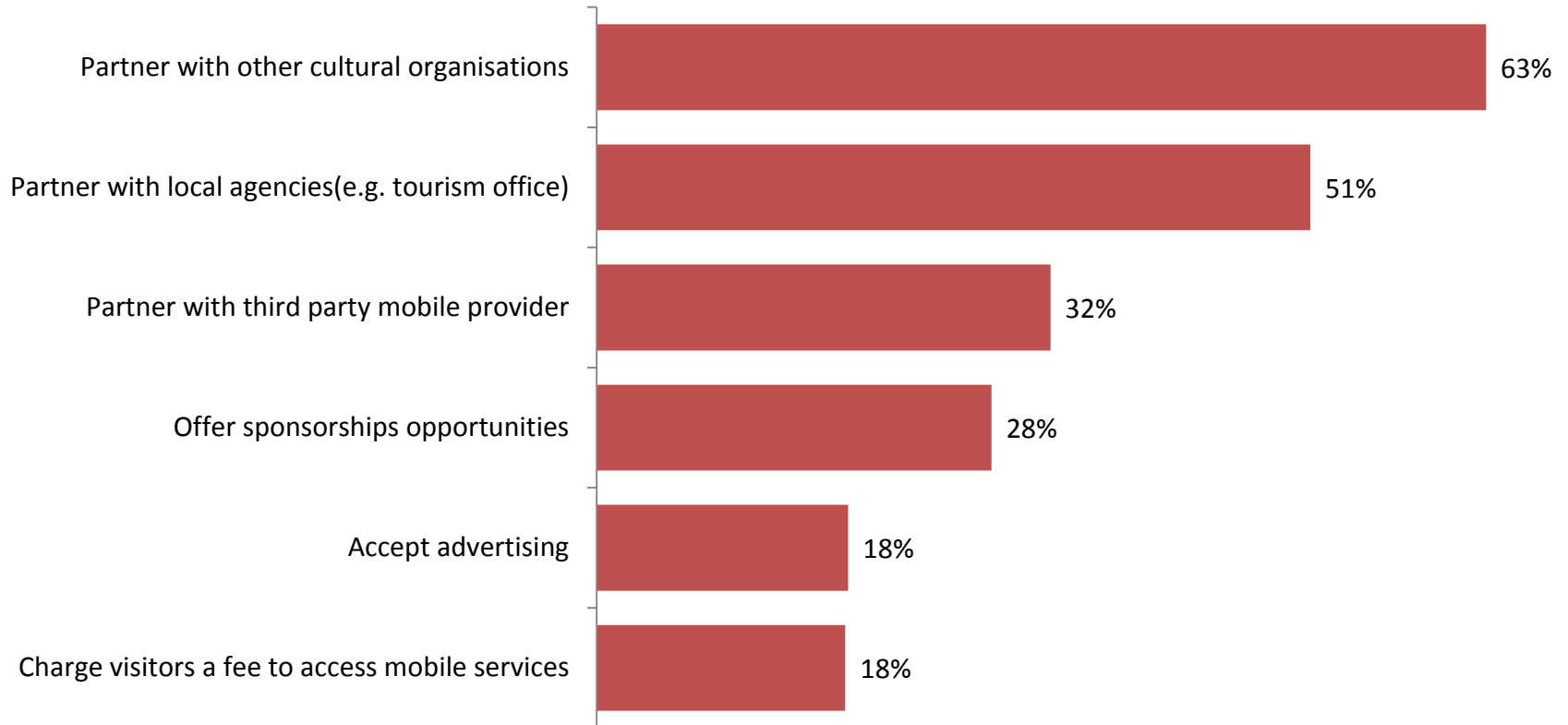


Q. What are the primary reason(s) why your organisation does not offer or use mobile technologies? (Select all that apply)

Partnerships important to support mobile programmes

Few museums see charging or advertising as effective tactics for supporting mobile programmes.

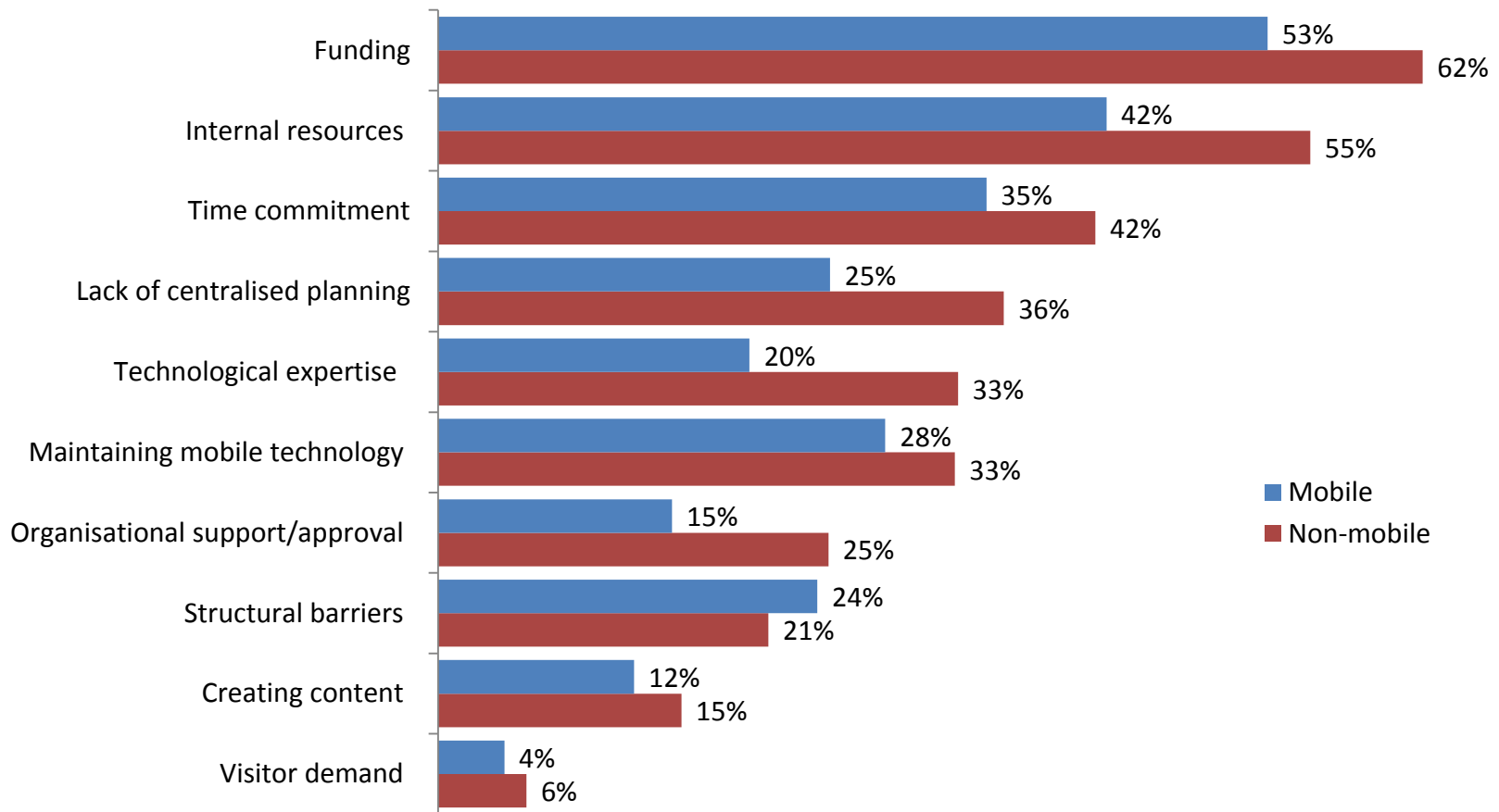
Initiatives to support mobile programmes among museums already offering mobile (% very/somewhat likely)



Q. How likely is your institution to do the following to support its current or potential mobile initiatives/programmes?

Key mobile challenges for museums include funding and internal resources

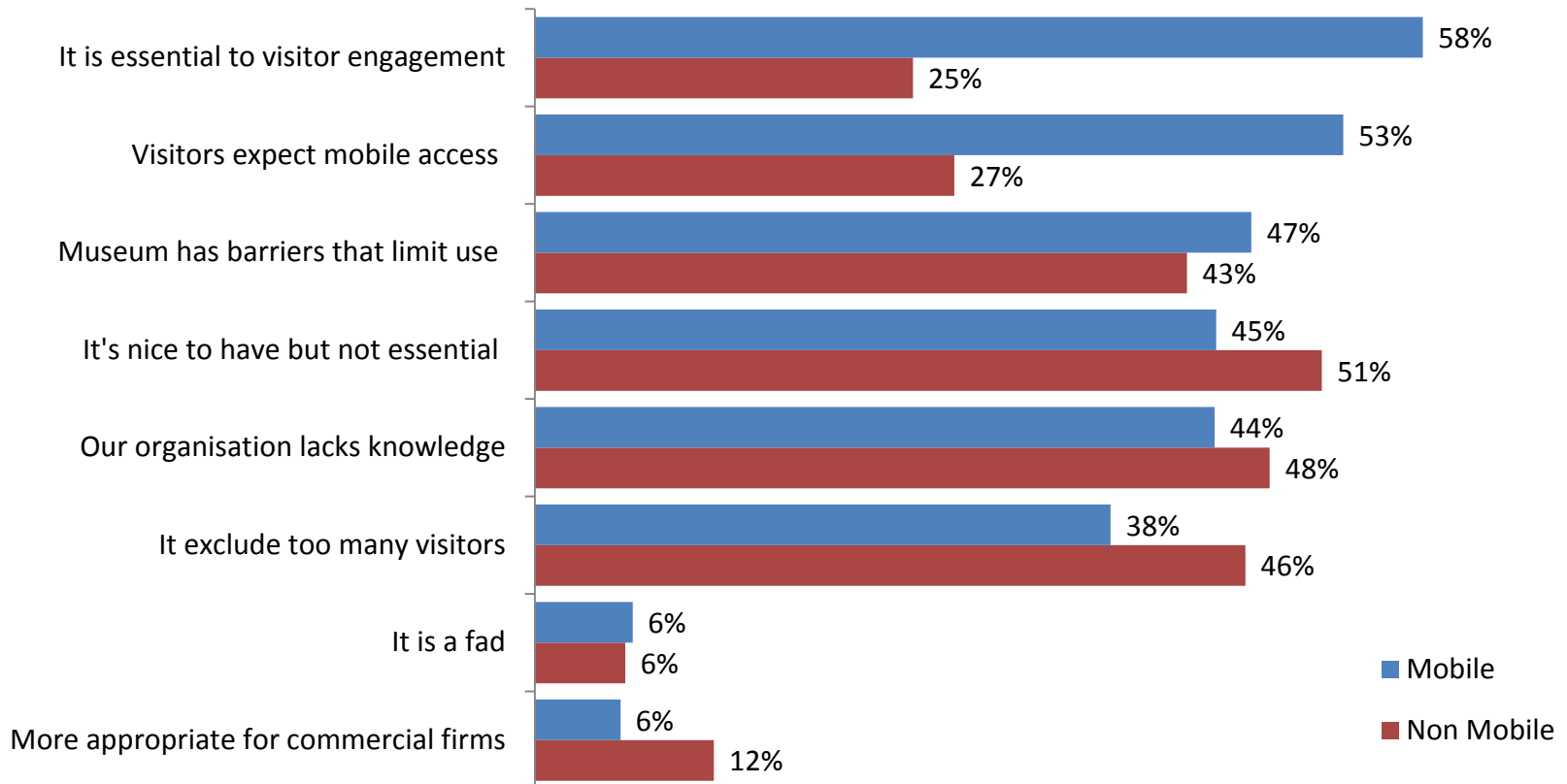
Mobile challenges



Q. How would you rate the following potential challenges to implementing mobile technologies in your museum?

Although views vary on mobile technology, few believe it is a fad or inappropriate for the cultural sector

Views on mobile technology in museums

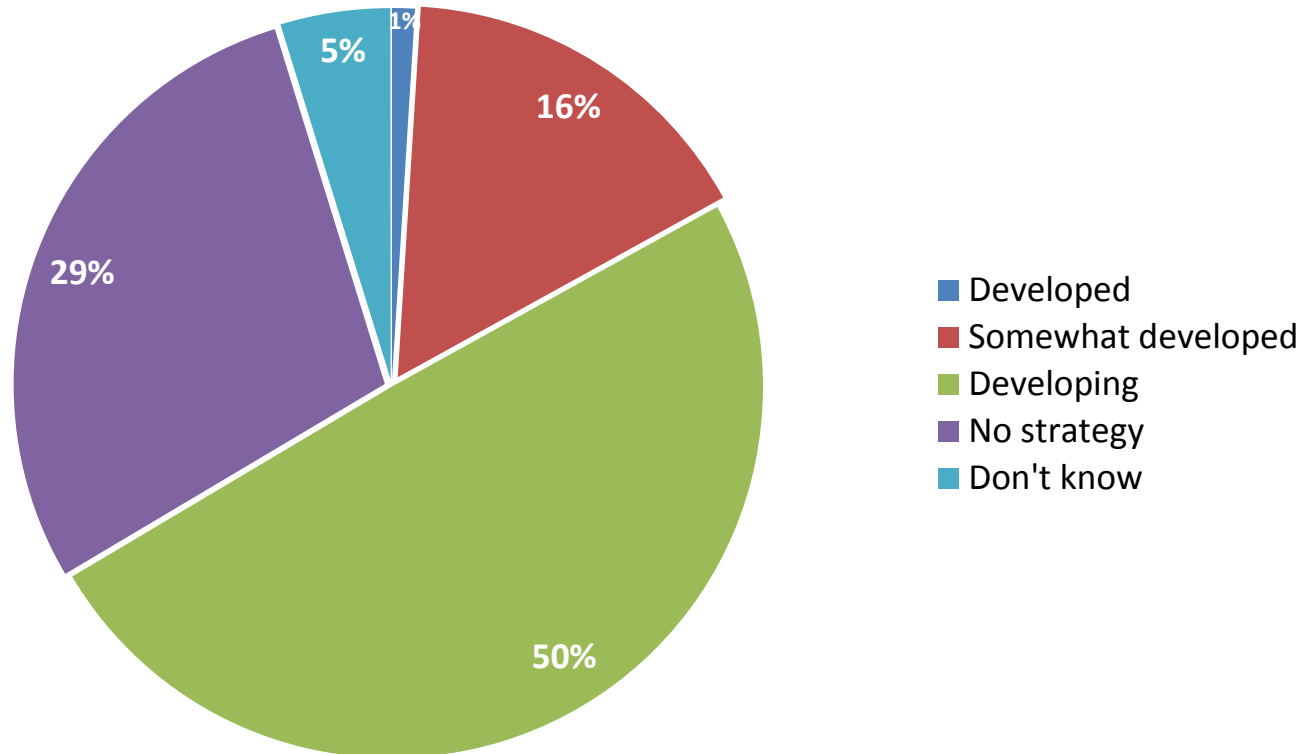


Q. Do you agree or disagree with the following statements?

Majority of UK museums already offering mobile are still developing strategies

Very few UK museums characterise their mobile strategy as developed.

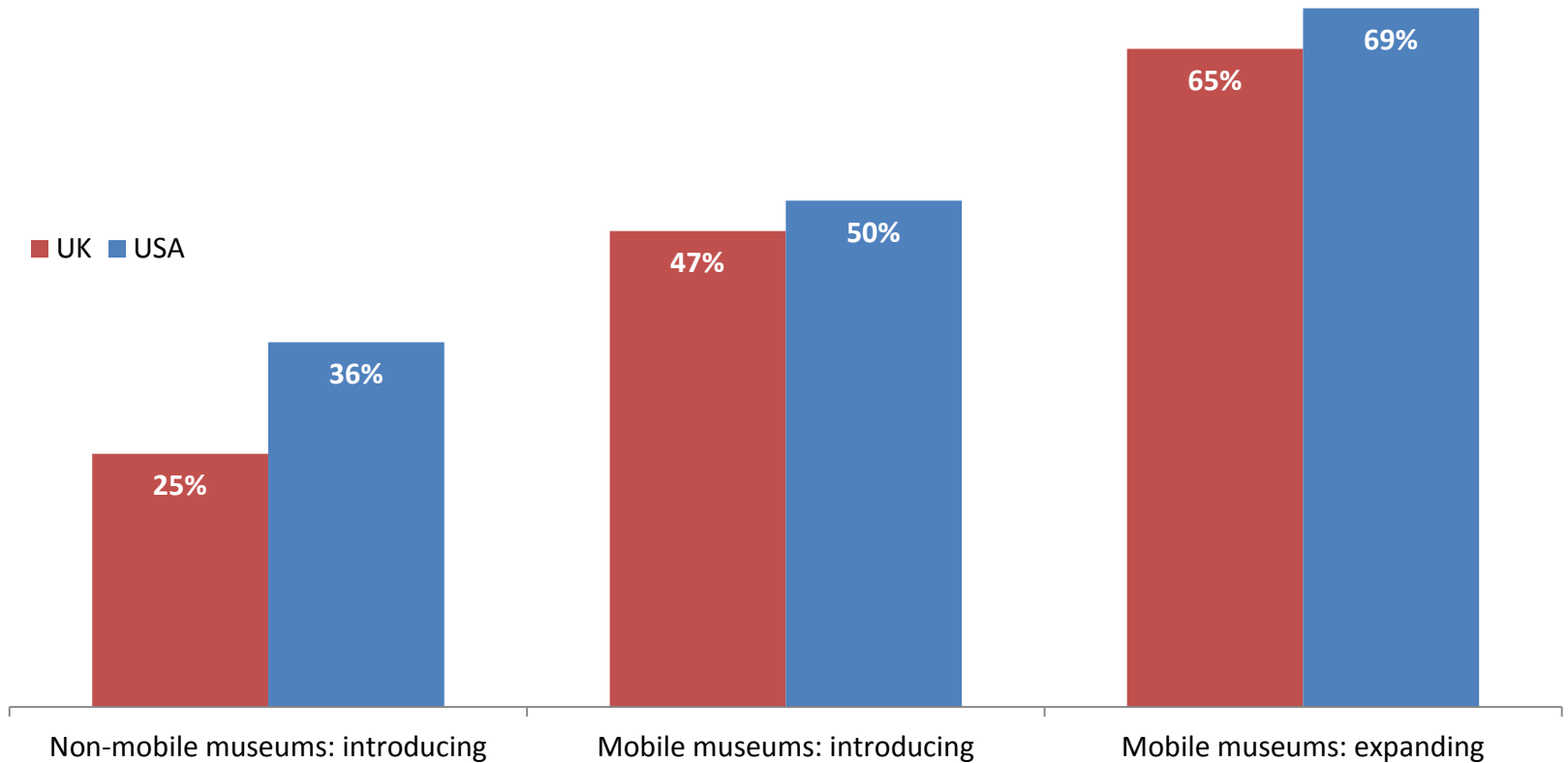
Status of mobile technology strategy



Q. How would you characterise your organisation's mobile programme strategy?

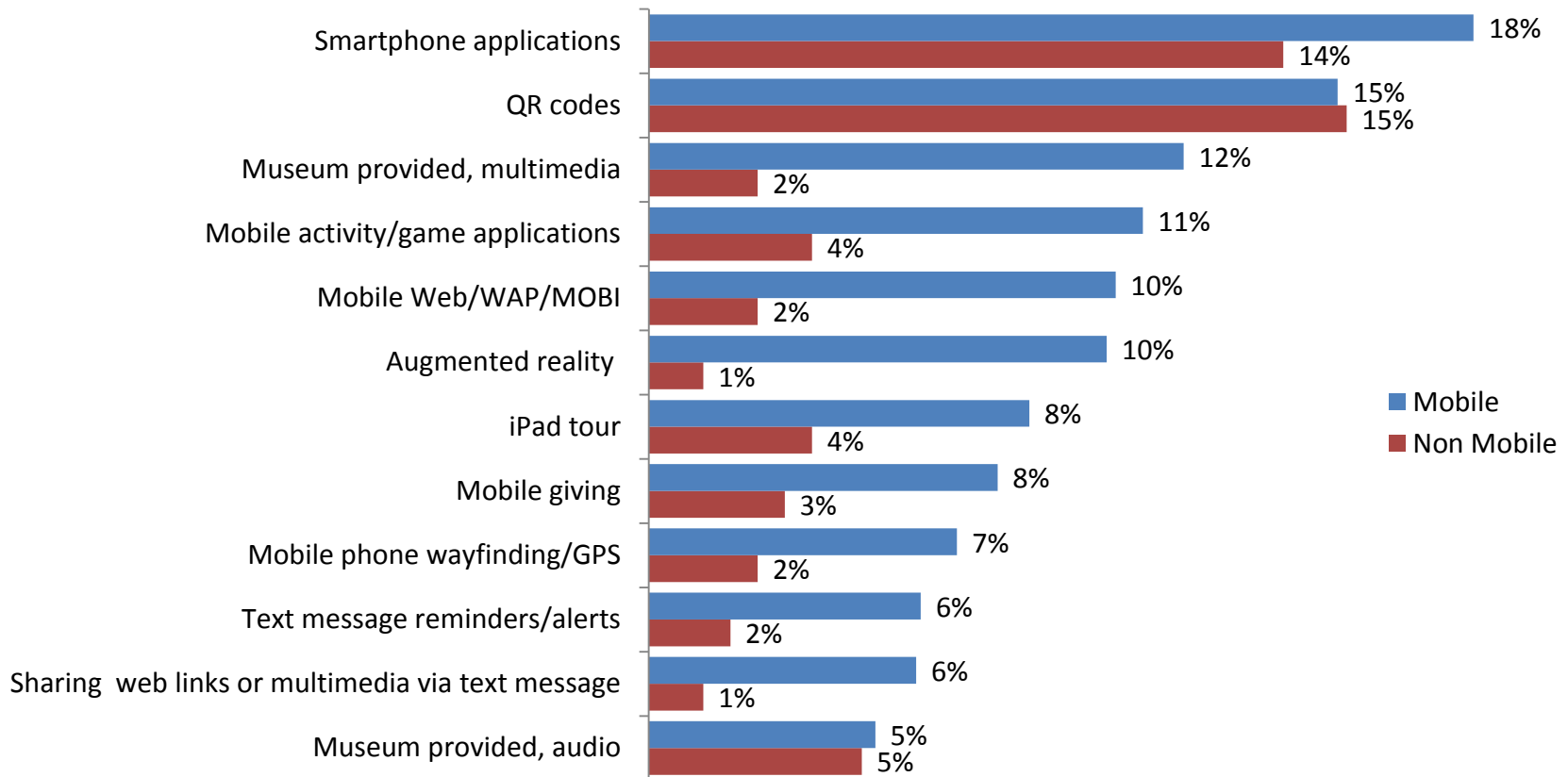
Museums' mobile future is bright

25% of UK museums without any mobile features plan to introduce mobile in 2012. Half of museums already offering mobile plan a new mobile launch while two thirds plan to expand existing mobile features in 2012.



Smartphone apps and QR codes top the list of 2012 new mobile introductions

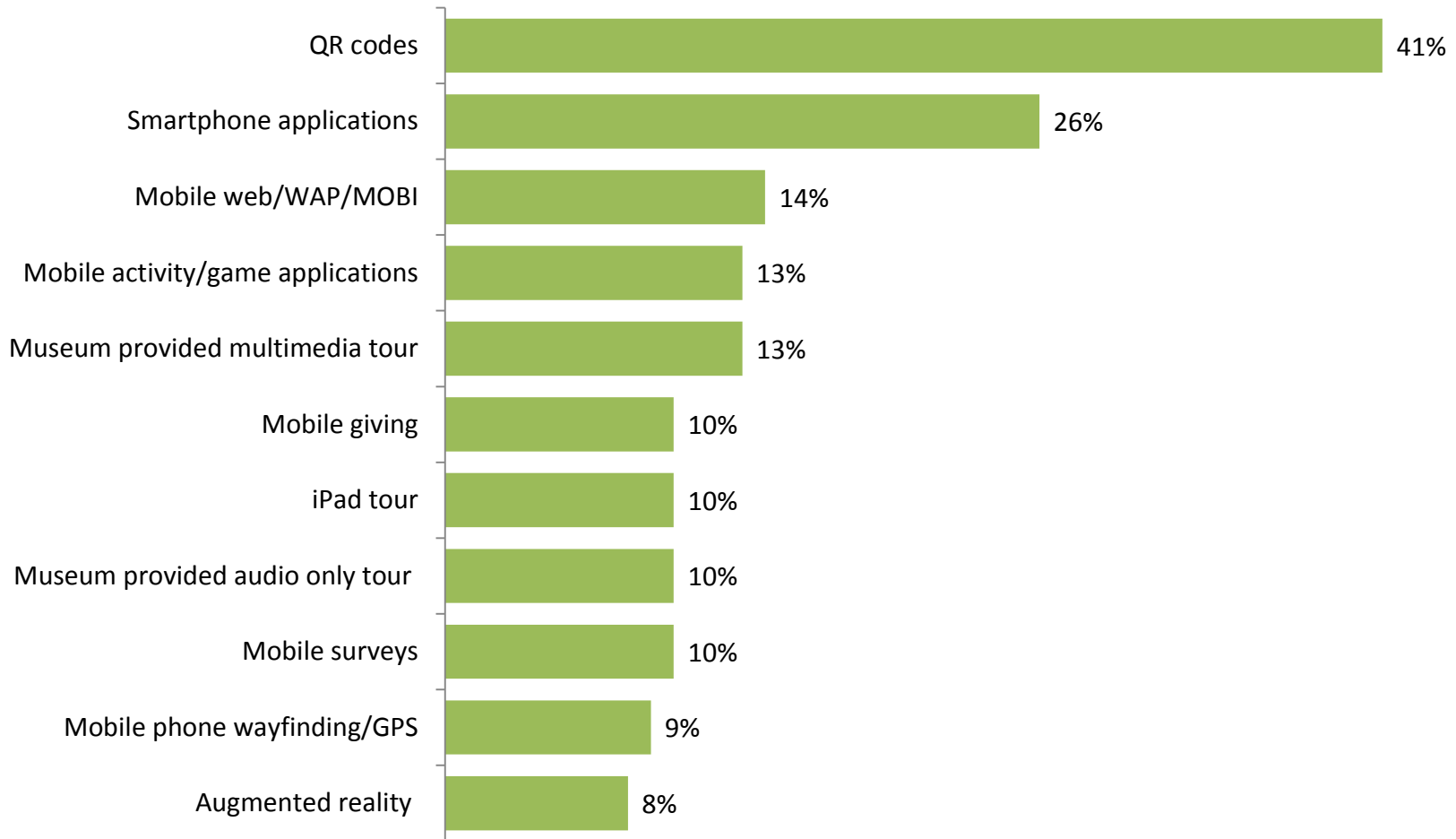
New mobile introductions



Q. Which of the following mobile platforms and/or features are you planning on introducing or expanding at your institution by the end of 2012?

QR codes top 2012 expansion plans

2012 feature expansions among UK museums offering mobile



Q. Which of the following mobile platforms and/or features are you planning on introducing or expanding at your institution by the end of 2012?

2012 mobile museum forecast

Overall, new mobile platform introductions in 2012 are forecasted to grow fastest in the UK and US among museums already offering mobile

Mobile platform introduction forecast

