AMERICAN ASSOCIATION OF MUSEUMS

2011 Mobile Technology Survey

Sponsored by Guide by Cell

Presented by: Fusion Research + Analytics

Research Objectives

- The American Association of Museums commissioned Fusion Research + Analytics to conduct research among its members to assess the use of mobile technology in museums and the attitudes that museum professionals have towards mobile technology. This research was generously supported by Guide by Cell. The core objectives included:

1. Estimating existing and future mobile platform usage
2. Determining the goals that museums have for their mobile programs
3. Key challenges in establishing/running a mobile program
4. Gauging AAM member interest in mobile technology insights and best practices

Survey Methodology

- The AAM Mobile Technology survey was fielded in December 2010 via an online survey tool.
- Invitations to participate in the survey were sent via e-mail to a large cross-section of AAM members – both individual members and representatives of member museums.
- 2,285 AAM members responded, representing more than 1,090 individual museums. The overall response rate was 14%.*
- Geographic distribution:
  - Responses received from museums in all 50 states.
  - California and New York were the two largest states in the response pool (9% and 8%, respectively).
  - Approximately 2% of the responses came from AAM members outside the United States.

* A $1 Amazon download certificate was offered to the first 500 respondents.

Executive Summary

Museums are *enthusiastic about the potential of mobile technology*:

- Overwhelmingly, museums agree that mobile platforms are important to visitor strategy and that mobile technology is here to stay, with less than 5% of respondents agreeing that mobile technology is a "fad."
- Mobile program goals and program management are no longer centered on education departments, but increasingly involve marketing and IT.

Museums are *embracing mobile technology, but face challenges*:

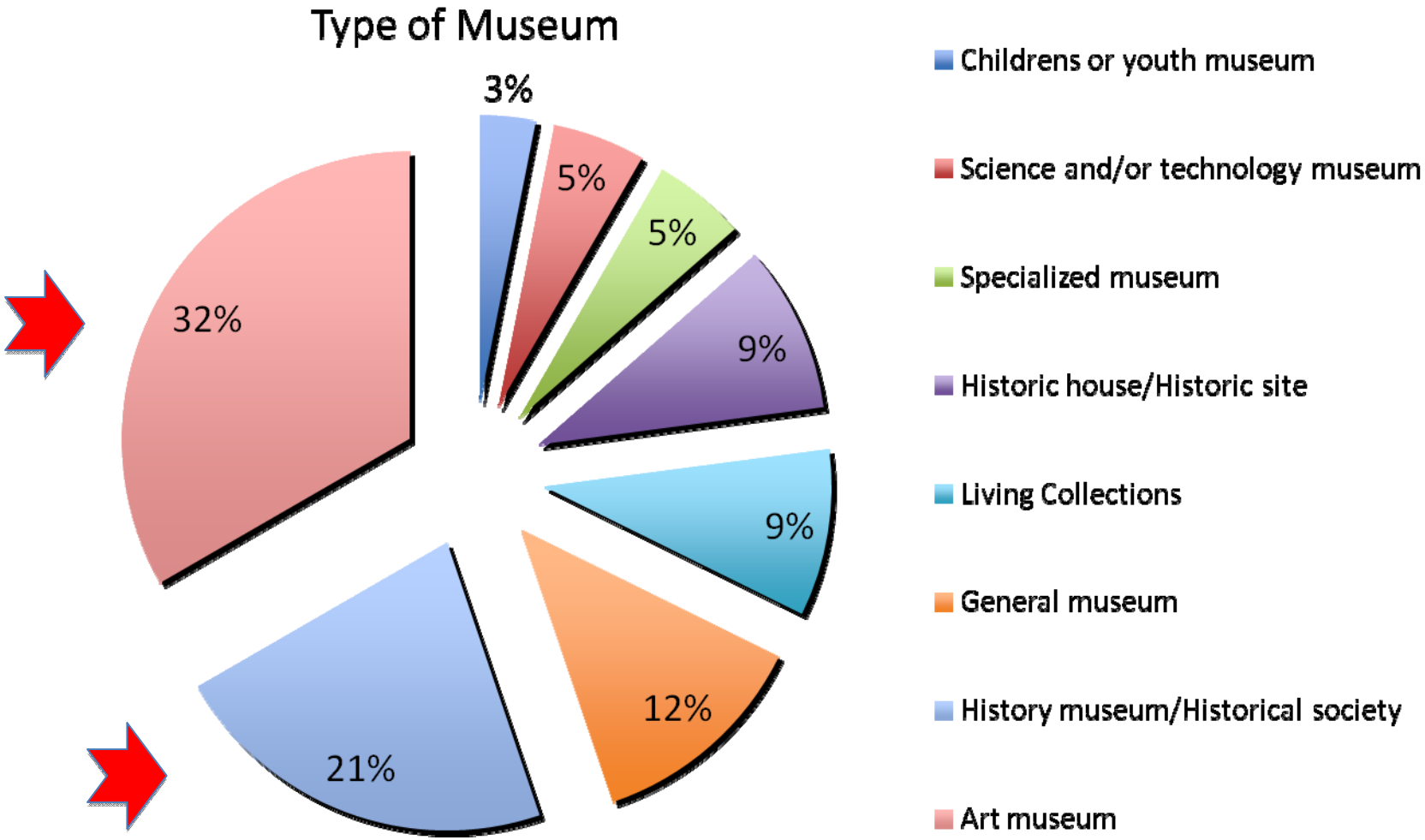
- Despite the impact and promise of mobile technology, *fewer than half* of U.S. museums currently provide visitors with an opportunity to use mobile technology during their visits.
- The biggest challenges for Mobile and Non-Mobile museums alike are funding, knowledge of different mobile platforms, and internal resources. Few list a lack of user/visitor demand as a challenge.

Executive Summary (continued)

Opportunities for a mobile future are ripe:

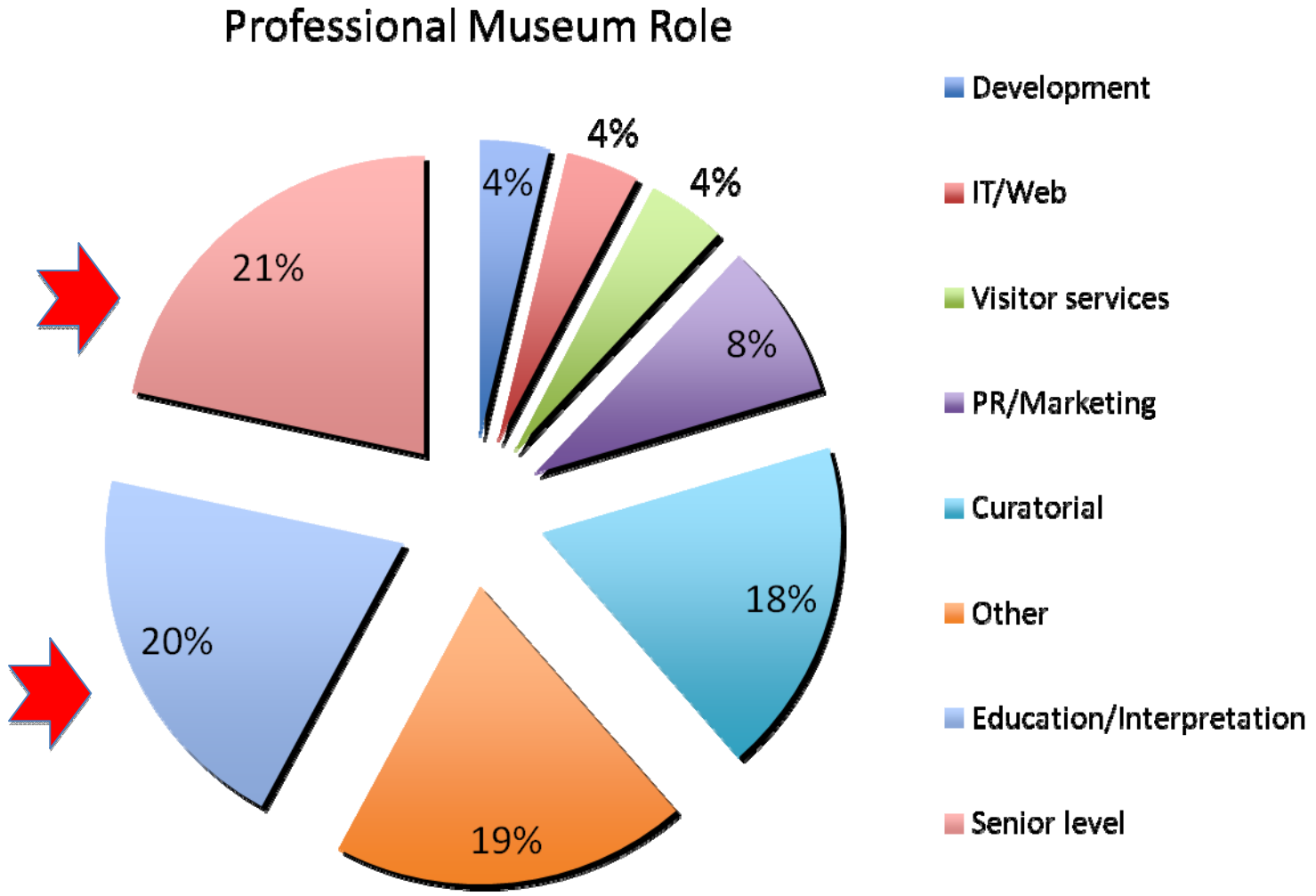
- One third of Mobile and Non-Mobile museums plan to introduce some new mobile technology platform(s) in 2011
  - The fastest growth will be in the area of *Smartphone apps*.
  - One in ten museums also plan to introduce *mobile giving* in the next year.
- However, the majority of mobile technology in museums today is still audio only. Emerging mobile technologies, such as Smartphone apps and multimedia (including augmented reality, QR codes, etc.), are present in less than one in twenty museums. Many museums are still eager to introduce or expand audio applications.
- To fill the knowledge gap about mobile technology, museums are keenly interested in access to industry insights – especially "case studies" and "research on mobile users (visitors)" to help inform mobile program development at their own institutions.

Sample Characteristics (I): Art Museums comprised the largest proportion of the sample followed by History museums/Historical societies.



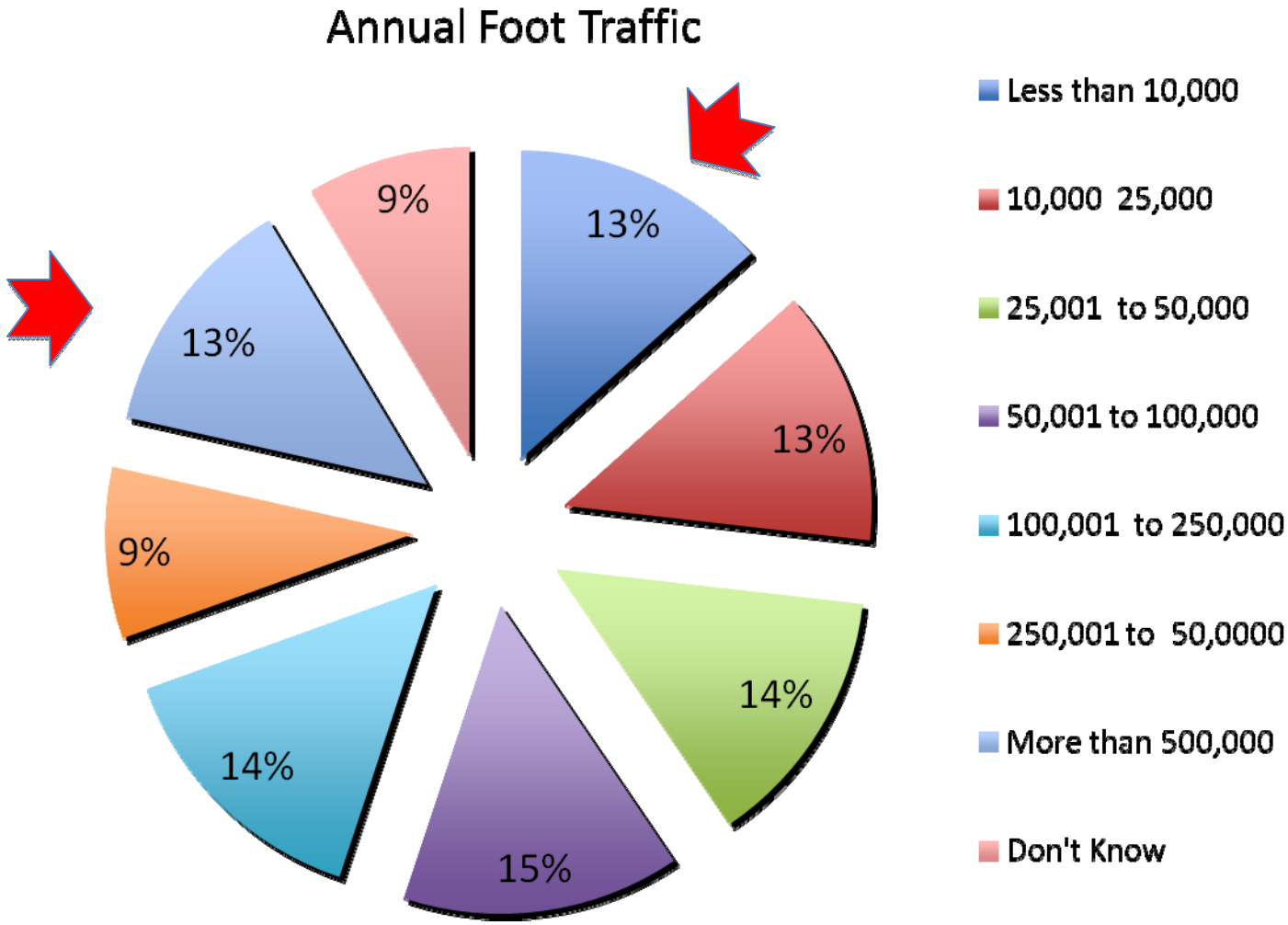
Q. What type of museum do you work for? (If you are a consultant or work for more than one type of museum, please mark the type of museum where you spend the most time.)

Sample Characteristics (II): Respondents represented all of the major professional functions at museums, including Senior level management, Education/Interpretation, and Curatorial staff.



Q. What is your primary professional role?

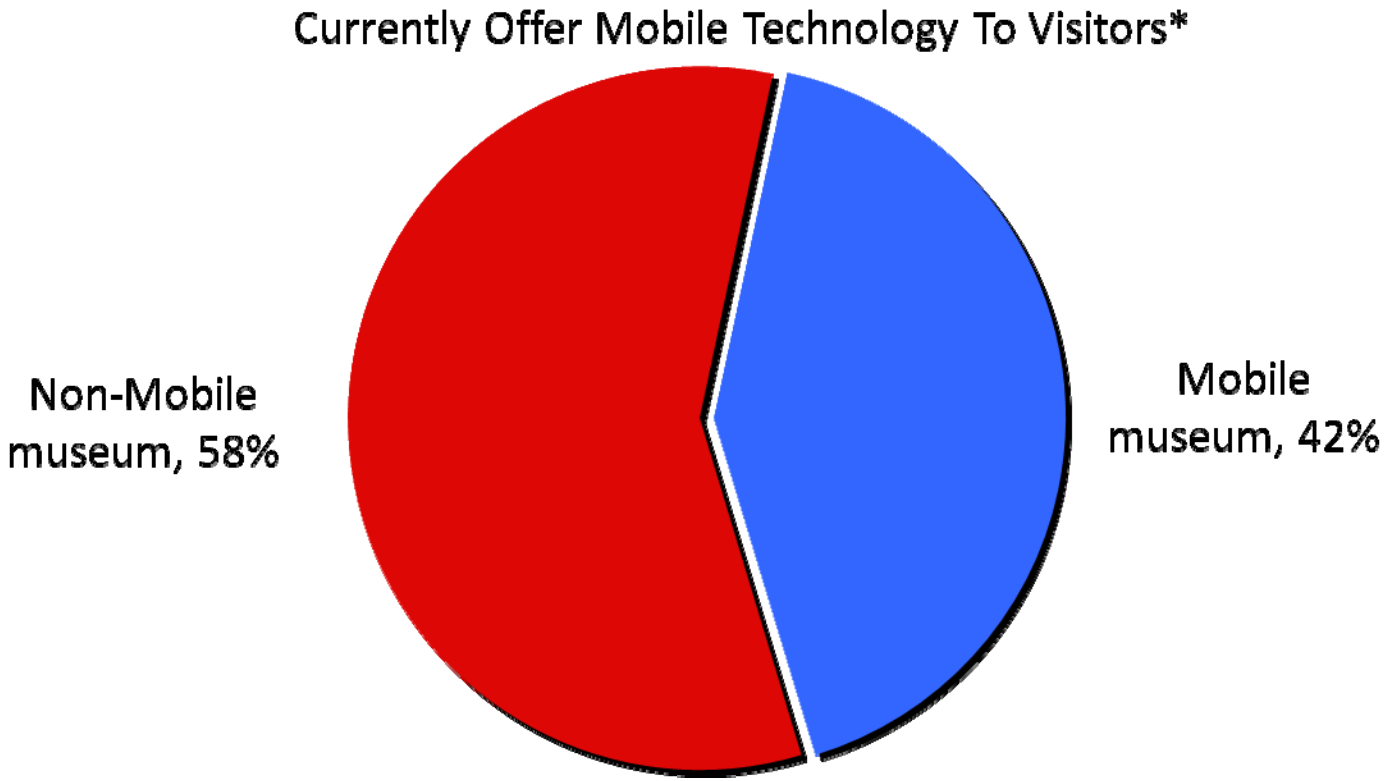
Sample Characteristics (III): The survey respondents represented museums of all sizes, with annual foot traffic (i.e., on-site visits) ranging from under 10,000 to more than 500,000 visitors a year.



Q. Approximately how many on-site visitors did you have last year?

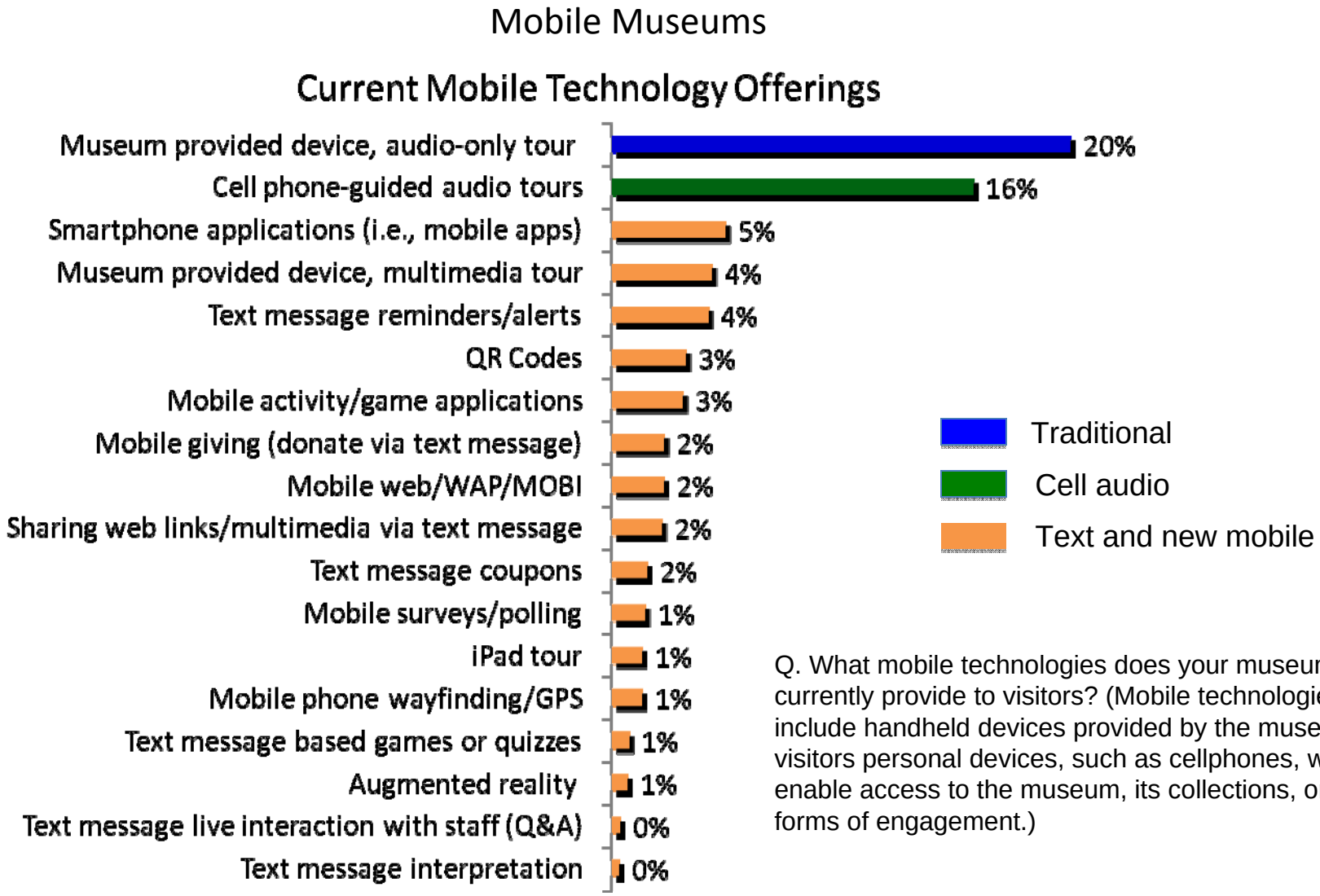
Mobile Technology in Place (I): Overall, fewer than half of AAM member museums currently offer mobile technology experiences for their visitors/users.

This estimate provides a key sector benchmark for the industry as mobile technology continues to proliferate!



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 cellphones, which enable access to the museum, its collections, or other forms of engagement.)
* Note: Estimate is based on individual museum responses

Mobile Technology in Place (II): The most common mobile technologies in museums are audio-only tours on devices provided by museums and cell phone guided tours. Only about one in twenty museums currently have smartphone apps and/or multimedia tours.

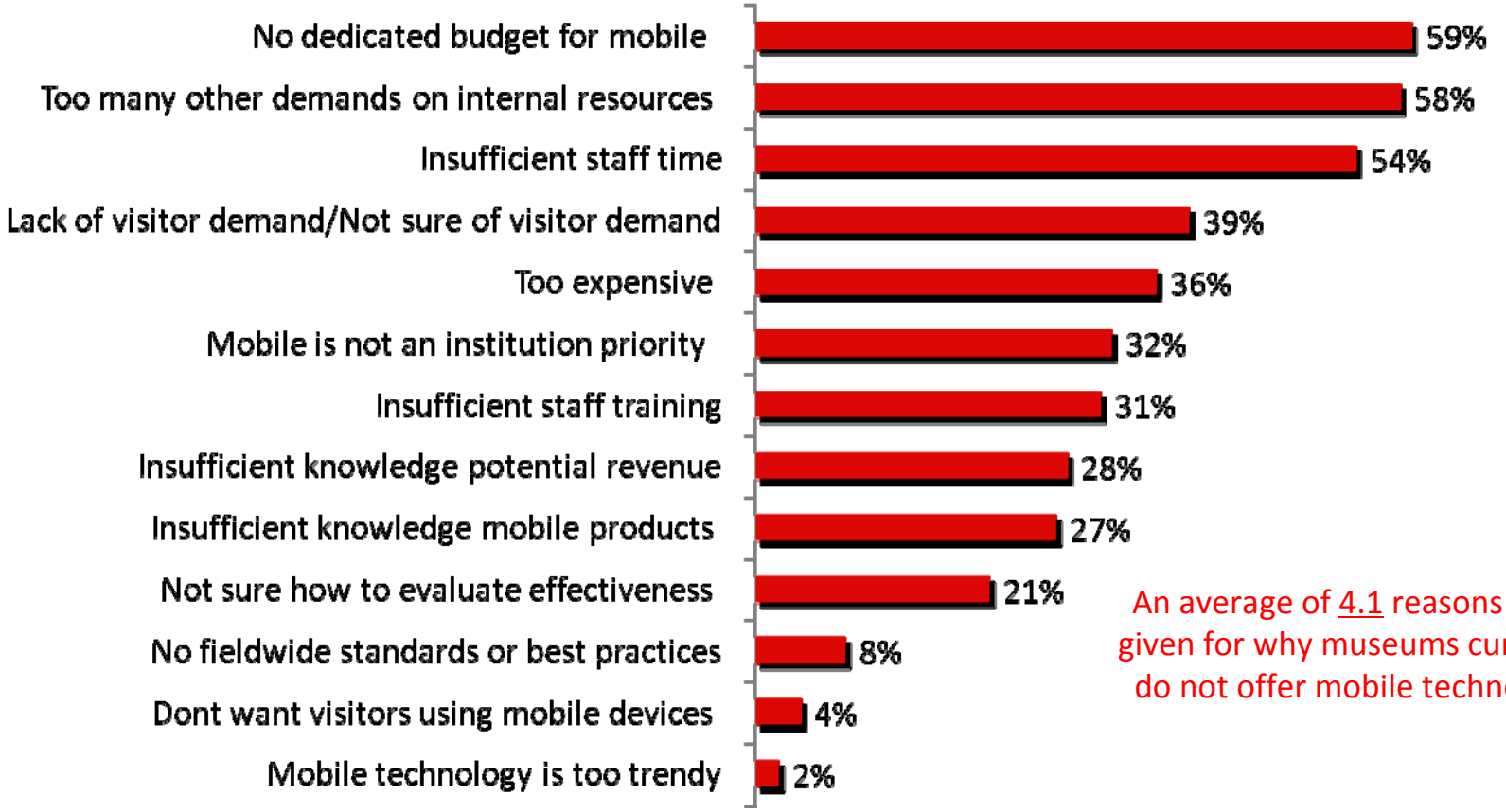


Q. What mobile technologies does your museum currently provide to visitors? (Mobile technologies include handheld devices provided by the museum or visitors personal devices, such as cellphones, which enable access to the museum, its collections, or other forms of engagement.)

Barriers: Budget and staff resources top the reasons why museums don't provide mobile technology experiences for visitors. Secondary reasons include a lack of knowledge about technology products, uncertainty about potential revenue, and insufficient staff training.

Non-Mobile Museums

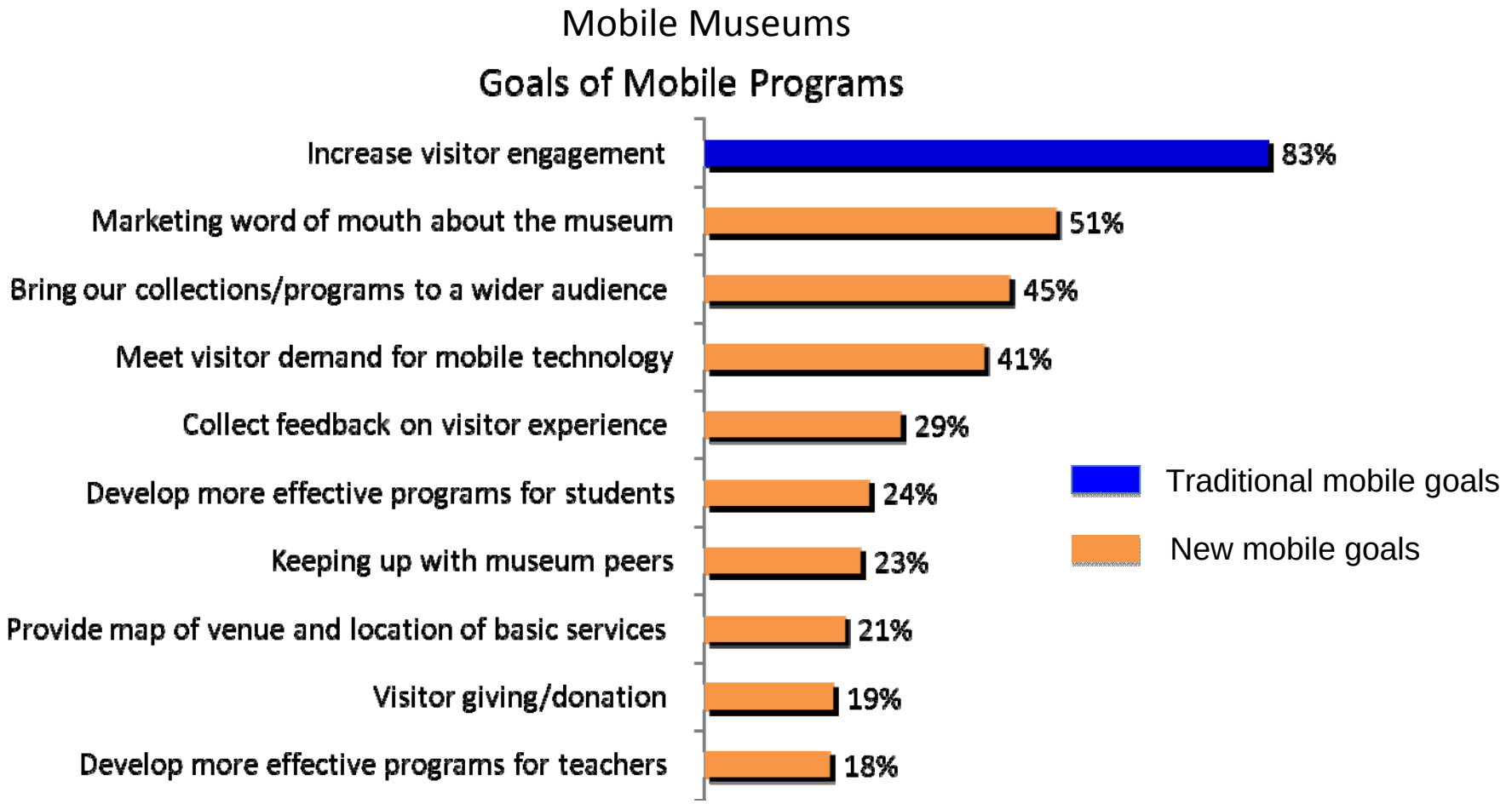
Reasons Why Museums Do Not Offer/Use Mobile Technology



An average of 4.1 reasons were given for why museums currently do not offer mobile technology

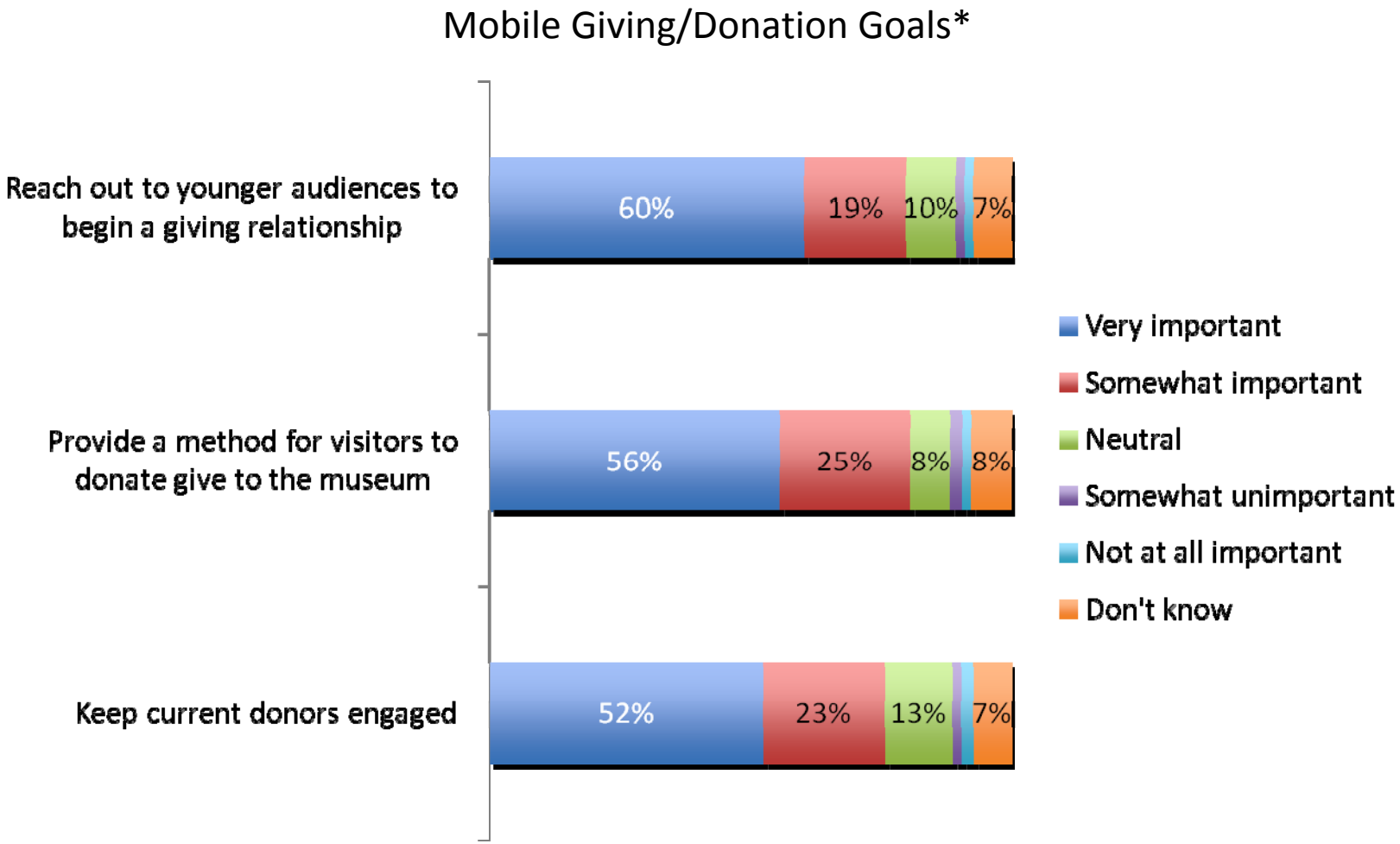
Q. What are the primary reason(s) why your organization does not offer or use mobile technologies? (Select all that apply)

Mobile Technology Goals: "Increased visitor engagement" is the traditional and most common goal of mobile technology programs, but "marketing and word of mouth" and "reaching a wider audience" also ranked highly. Museums see broader potential in today's mobile technology than just learning. The ease of two-way mobile interaction is also driving emerging goals, such as mobile giving/donation.



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

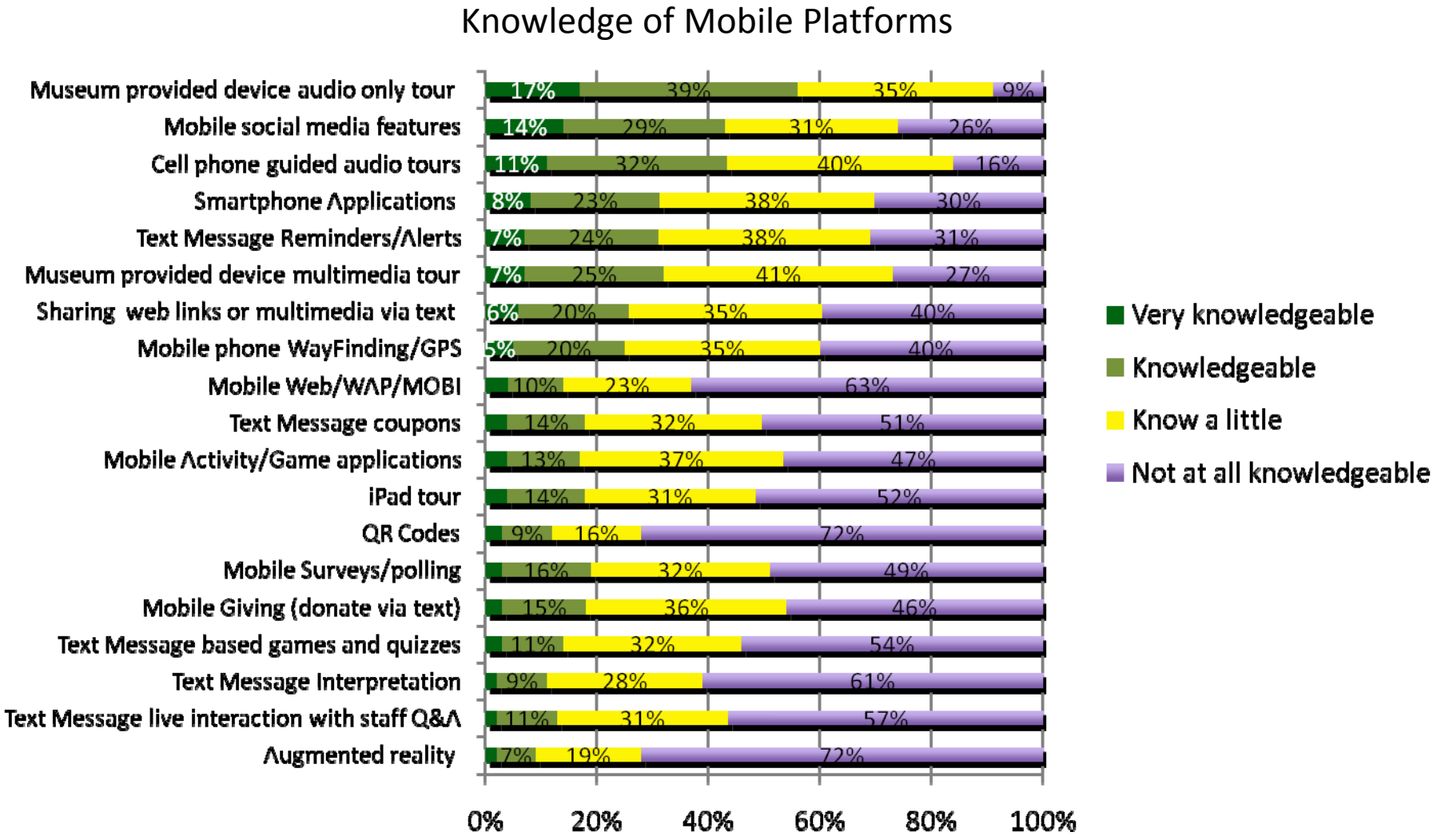
Mobile Giving: Museums that rank Mobile Giving/Donation among their goals also think it is important to "reach out to younger audiences to establish a giving relationship," "provide a method for donating," and "keep current donors engaged." Mobile fundraising is typically seen as part of engagement.



Q. Please rate how important each of the following components are to your giving/donation mobile strategy/goals:

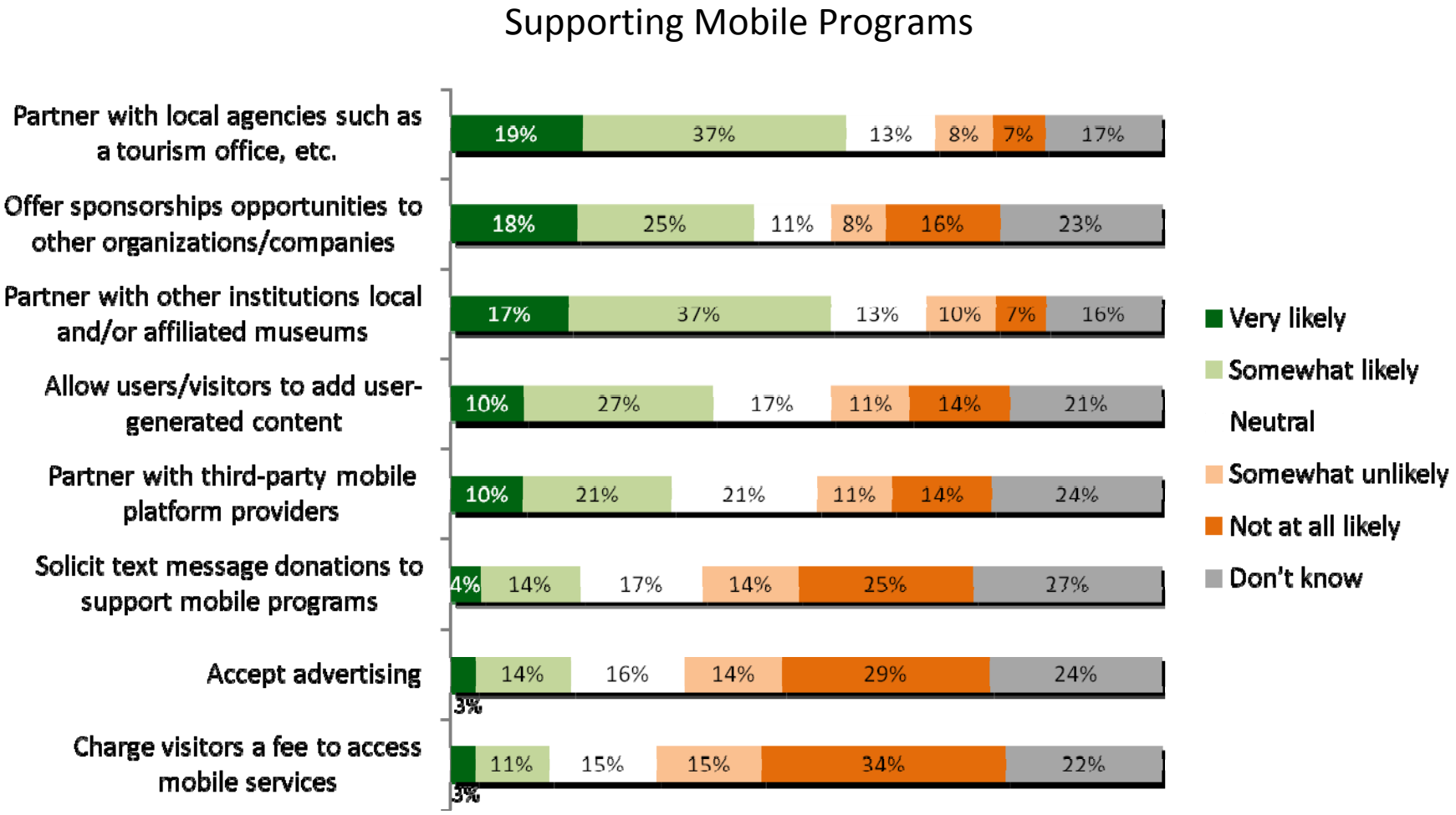
* Among museums that have mobile Giving/Donation goals only.

Mobile Technology Awareness: Respondents knew the most about traditional mobile platforms (such as audio tours) and relatively little about newer technologies (such as augmented reality or interpretation via text messages).



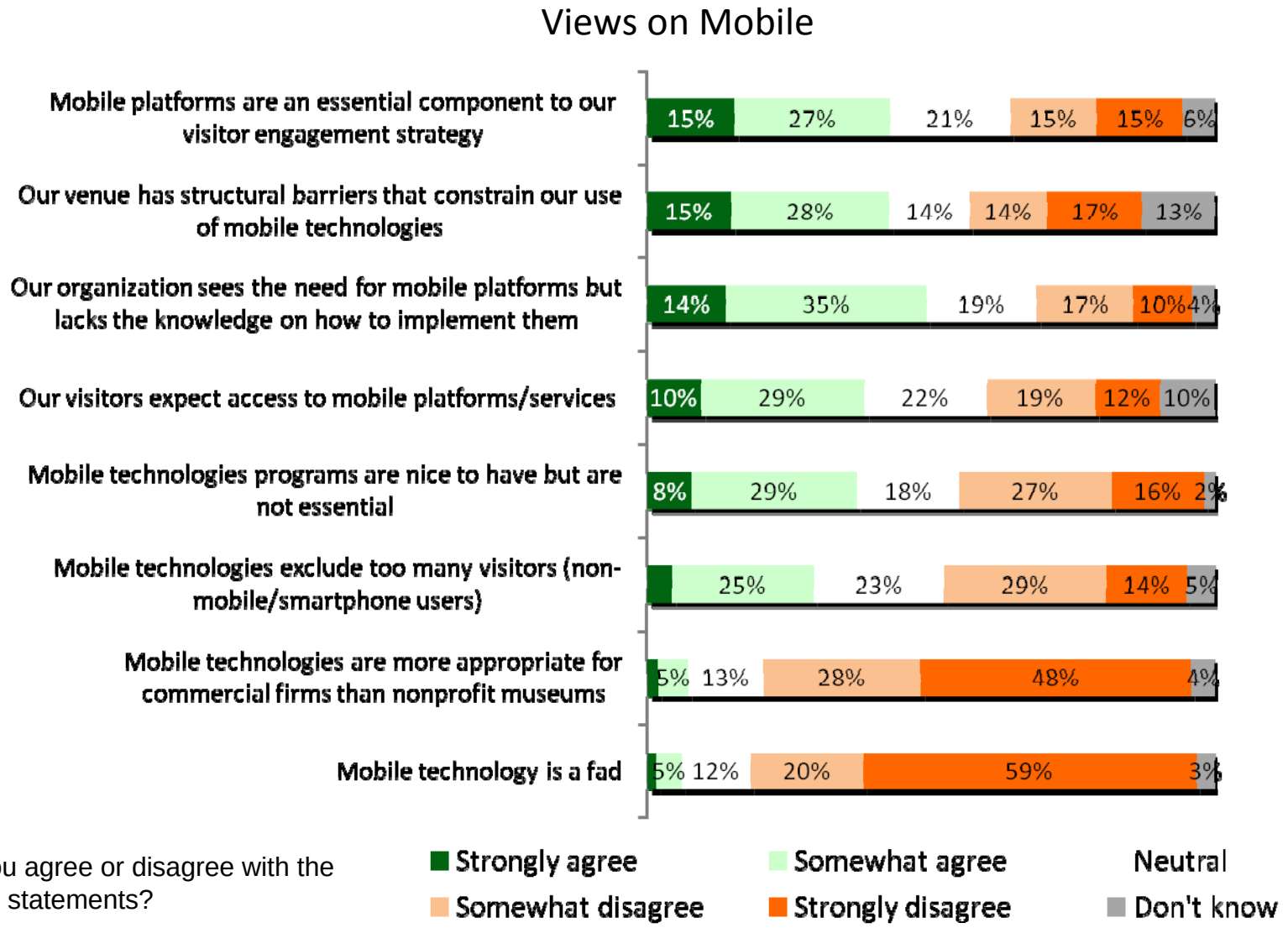
Q. What is your personal knowledge of the following mobile platforms, features and revenue models?

Financial Models: Museums are most likely to turn to sponsorships or partnerships to support mobile programs. Advertising and user fees are not considered likely sources of support.



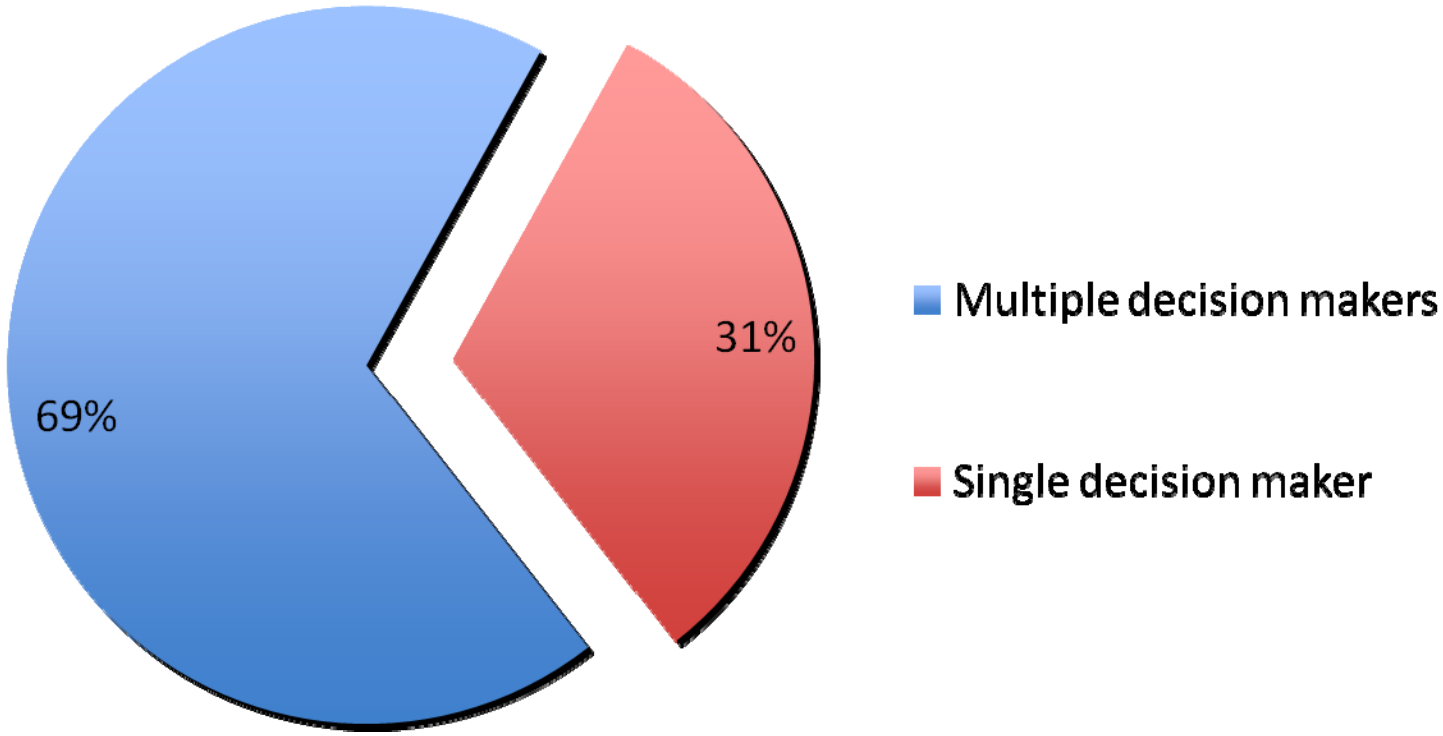
Q. How likely is your institution to do the following to support its current or potential mobile initiatives/programs?

Mobile Technology Here to Stay in Museums: Museums agree that mobile platforms are important to visitor engagement strategy and that mobile technology is here to stay – fewer than 5% say that "mobile technology is a fad."



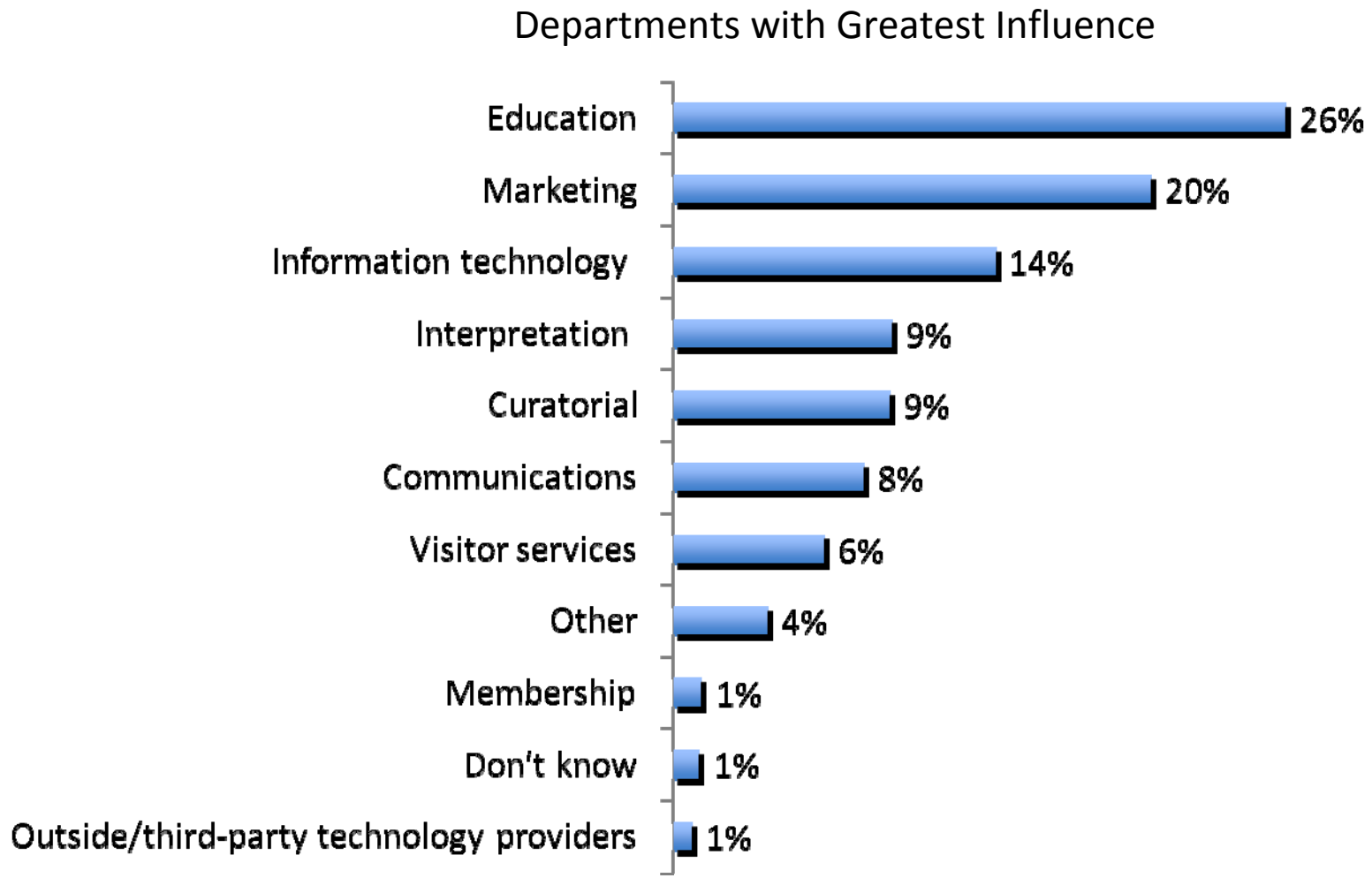
Q. Do you agree or disagree with the following statements?

Who Makes the Decisions about Mobile Technology (I): The majority of museums have multiple departments involved in making decisions about mobile technology in their institution.



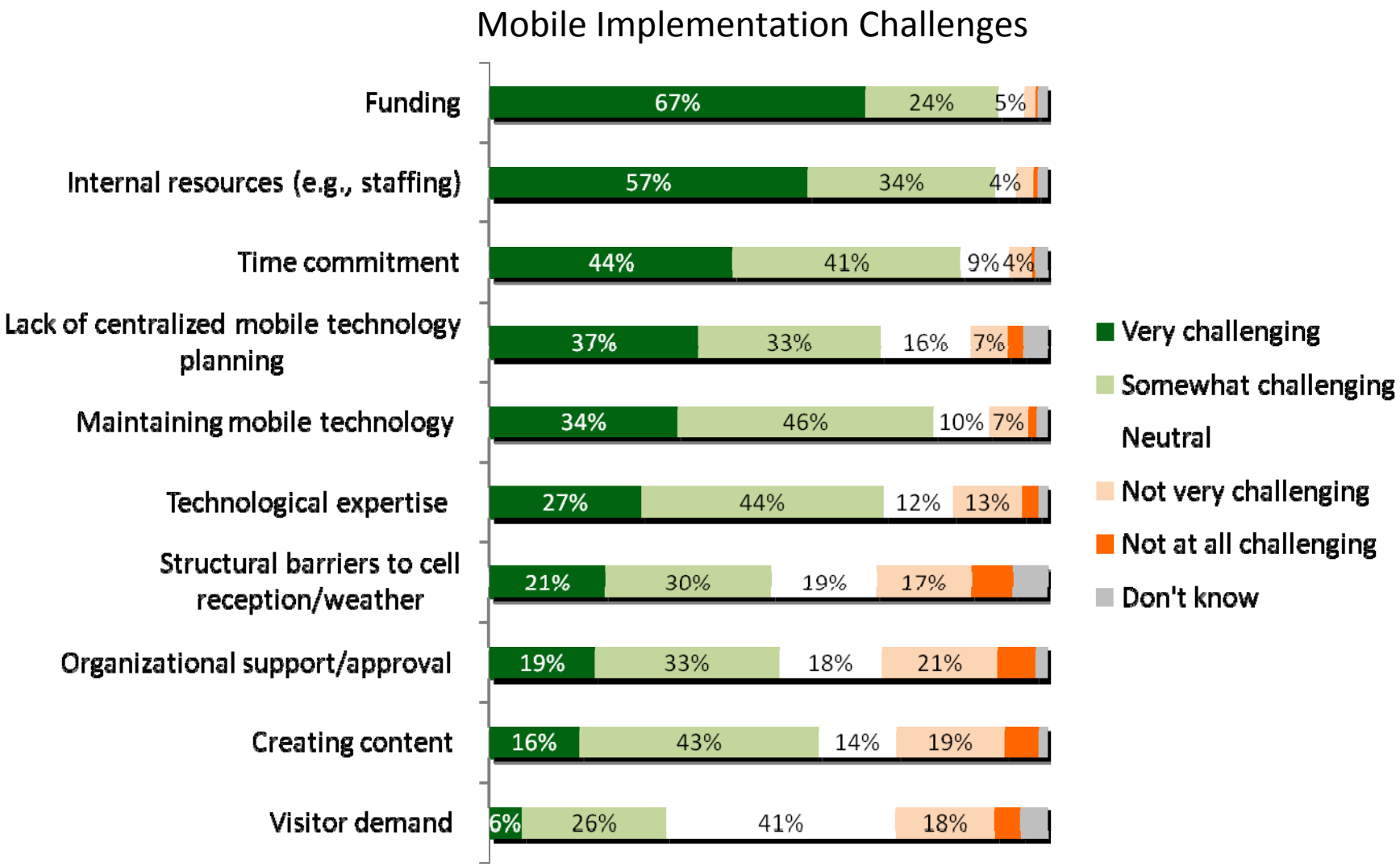
Q. [Is] more than one department ... responsible for your mobile program(s) or potential mobile program(s)?

Who Makes the Decisions about Mobile Technology (II): Museum education departments typically have the most influence on mobile technology decisions, followed by marketing.



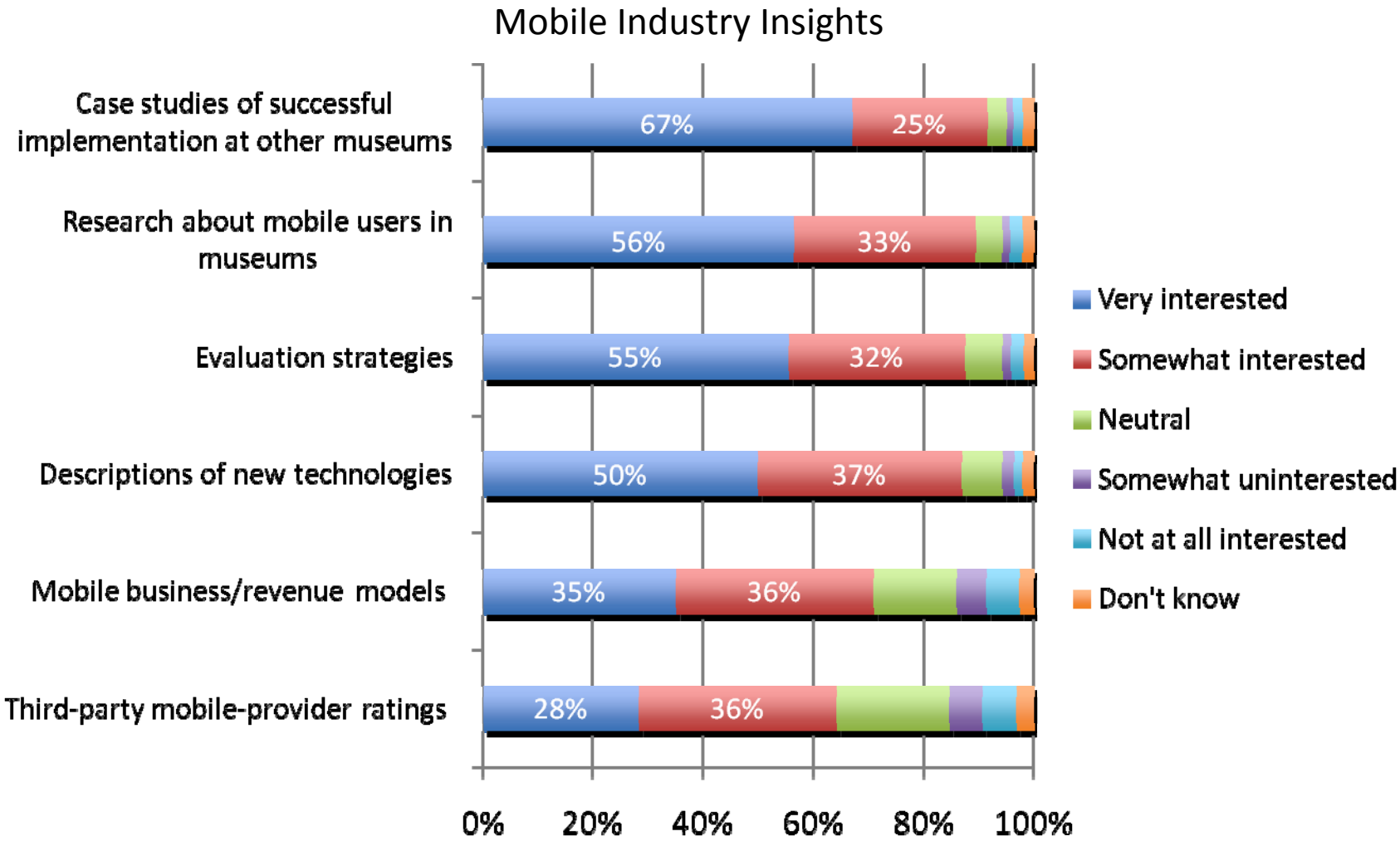
Q. Which one of these departments would you say has the greatest influence on existing and/or potential mobile strategies? (please select only one)

Challenges: When it comes to implementing mobile technology, the biggest challenges for Mobile and Non-Mobile museums alike are funding and internal resources. Very few see a lack of visitor demand as a challenge.



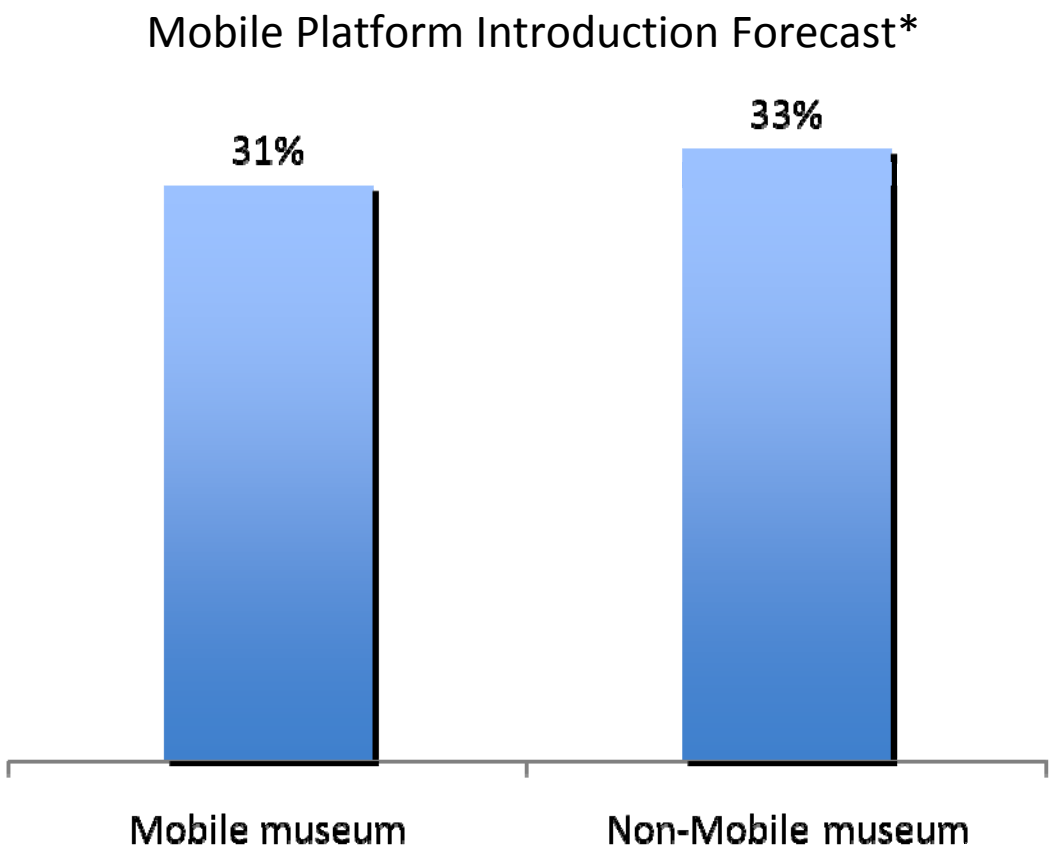
Q. How would you rate the following possible challenges to implementing mobile technologies in your museum?

Seeking Industry Insights: Mobile and Non-Mobile museums are both keenly interested in access to industry insights – especially "case studies" and "research on mobile users" to help inform mobile program development at their own institutions.



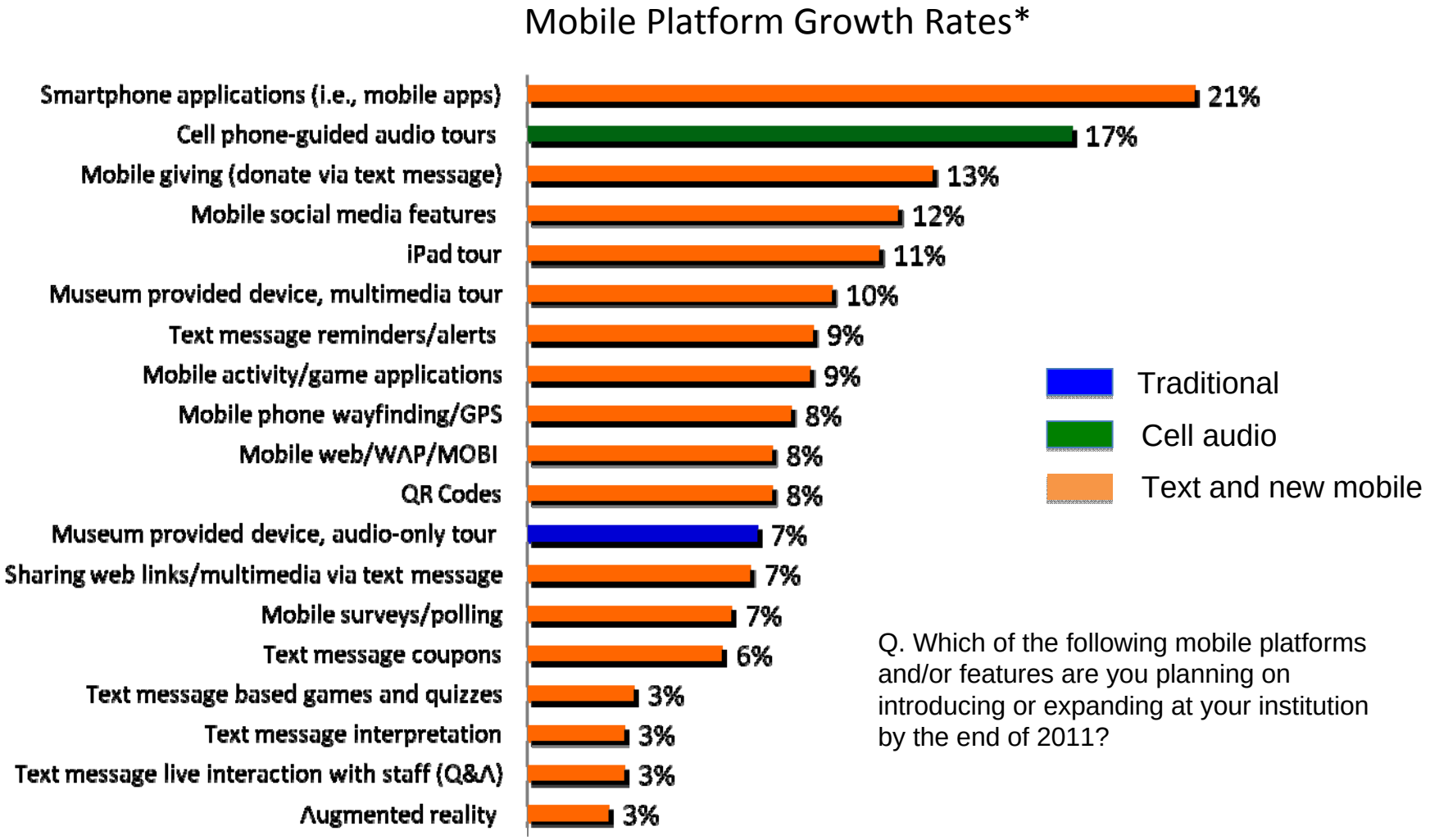
Q. How interested are you in obtaining industry insights about the following mobile issues and developments?

2011 Forecast: Overall, we project that *a third of all museums in the United States will introduce new mobile technology platforms in 2011*. This does not count the expansion of existing platforms at these institutions (such as updating the content of an existing audio tour without introducing new technology).



* Forecasts are based on museum-level responses and have been discounted by 30%.

2011 Forecast: Smartphone apps will experience the fastest growth in 2011, followed closely by cell phone-guided audio tours (already a "traditional" form of mobile technology at museums). We also expect rapid growth in mobile giving.



Q. Which of the following mobile platforms and/or features are you planning on introducing or expanding at your institution by the end of 2011?

* Forecasts are based on museum-level responses and have been discounted by 30%.

About AAM: The American Association of Museums has been bringing museums together since 1906. With more than 18,000 individual, 3,000 institutional and 300 corporate members, AAM is dedicated to ensuring that museums remain a vital part of the American landscape, connecting people with the greatest achievements of the human experience, past, present and future. For more information, visit www.aam-us.org. For more information about this report, contact Dewey Blanton, 202-218-7704, dblanton@aam-us.org.

About Fusion Research + Analytics, LLC: Fusion provides tailored research and strategic audience evaluations for cultural institutions. They start with thorough and innovative research – and then work with clients to understand the tactical and strategic implications of their research insights. For more information about this report and detailed analysis, contact Matthew Petrie, 202-841-5855, m_petrie@fusionanalytics.com.

About Guide by Cell: Guide by Cell is the world's largest provider of interactive mobile technology solutions for cultural institutions and nonprofit organizations. Since 2004, the company has expanded its services to include mobile audio tours, text messaging systems, Smartphone applications and mobile giving campaigns. For more information, visit www.guidebycell.com.

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