ACSOL GUIDE TO DIGITAL SKILLS

Culture, Arts and Entertainment Skills
International Analysis

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Background

Research into the changing digital skills needs in the Arts and Culture workforce, and how they may have been impacted by the COVID Pandemic has been undertaken by the international partners in the ACSOL Project.

An online questionnaire was distributed to people working in the sector via both partner prompts/newsletters and direct emails to organisations in the sector. This collected data on digital skills within the workforce (defined as the ability to use information and communication technologies effectively to achieve work objectives), their growing importance in light of the pandemic and experiences of digital skills learning and training and individual perceptions of digital skills and e-learning.

The survey covered a cross section of staff employed within the sector - including owners, managers, freelancers, administrators, technicians etc. The results per country varied but enough were received to allow reliable analysis, with the exception of Italy where results were quite low, so we need to be careful about comparisons. Responses were primarily from a mixture of employees, managers and owners. We also attracted a reasonable level of response from freelancers. The nature of the questions asked – and the subject matter of the questions -remained consistent. However national surveys did modify some questions where this was needed, and in the UK, following advice from trade unions, the questions were very slightly re-worded for those self-identifying as employees and freelancers.

Guidance Recommendations for the Triple Helix Groups

This Guide pulls together the findings from the International ACSOL Surveys exploring the impact of COVID on the digital skills needs in the Arts and Culture sector. Each partner country will be delivering three sessions with employers, education providers and workforce representatives to examine these findings – most importantly those form their own country – and making recommendations for what kinds of training materials or approaches to training need greater focus. Our project will, ultimately also deliver new training materials (e-Learning Modules or similar).

Having examined the findings in detail we can make the following recommendations for the Triple Helix Groups:

1. When sense checking the national findings with your Helix Groups you will need to outline how the survey was distributed and the numbers and nature of the respondents (owners vs employees etc.
2. Job Vacancy data is interesting for the different partner countries. As expected there is a drop in most adverts in the various sub-sectors though with some evidence that roles such as photographers and more specialist roles working virtually showed increases.
3. Job adverts also demonstrated that the extent to which digital skills are requested within job adverts varies considerably. Project staff looking to work with these results should sense-check these with their Helix groups to confirm what skills are asked for and why, or why not. It could be that some countries make major assumptions around digital skills levels and focus far more on professional skills and softer skills.
4. The surveys were successful at targeting smaller employers – and we need to ensure their voice is also heard in the Helix Groups.
5. Establishing differing impacts on Fields of Activity will be important as respondent countries varied considerably in this regard. Though respondents were in the sector – it is a large sector and making sure new materials meet the real need and not just in a limited area of the sector is important.
6. In terms of how workers and managers use digital skills – the numbers using digital skills for core elements of their work such as management and communication are really surprisingly small. There is a persistently small group who do not use digital skills at all in their work. Given this, it is unsurprising how many do not use digital techniques for performance. Logically we need to look at why this is and what sectoral materials to open up the potential of the digital world need to be developed.
7. Where respondents are using digital skills and techniques – the rate of customer satisfaction seems reassuringly high. This should encourage others to seek greater adoption.
8. COVID has, unsurprisingly, encouraged or pushed most organisations in the sector to do more via digital means. Logically therefore there are a great deal of early and relatively new adopters of technology who may be willing to learn more and do more. The challenge will be the smaller numbers who despite COVID impacting on the way they work, have not made the shift. It could be that we need to reflect this ins the kinds of materials we develop for the sector.
9. We identified some very real skills needs in the sector. Basic digital skills may well be a concern for the sector – as 21% of respondents saying that at least a quarter of their employees lacked basic digital skills and that this was worst in smaller employers and amongst older workers. There are also real barriers with time and finance to enable training in digital skills. Again we need to consider therefore how we target materials and what format will work best.

10. Looking at the kinds of materials and digital activities respondents wished to engage in is useful as it could guide the modules we propose to develop. These could include: Posting video/audio content; providing educational content or online events for schools and other audiences; Conduct simulcast/livestream performances; Search engine optimisation.
11. Online learning experiences were broadly very positive – but some countries – notably Romania had less experience of this and so the market for our modules may be lower and this needs reflection.

What do we learn from Job Adverts?

Annex 2 of this report includes the results of detailed (2021) analysis by the University of Milano-Bicocca of the skills visible in online job adverts in partner countries in the Arts and Culture sector (and the Care Sector – but this is dealt with in a separate report).

Analysis of this reveals different approaches to job adverts in partner countries. The project looked for digital skills, professional skills and transversal (employability/soft) skills.

In Spain, digital skills account for 37% of skills requested in job adverts from Spain with professional and transversal skills also well-represented. In Romania, digital skills are not present at all and transversal are the most commonly present. Similarly in Italy transversal skills are the most commonly requested (approximately 50%) followed by professional skills and 19% of skills are digital ones. Professional skills account for almost half in Germany, followed by digital skills and smaller amounts of transversal skills. This pattern is repeated in the UK with a slightly higher concentration of professional skills (likely to be sectoral ones).

We also looked at the type of digital skills found in the adverts – whether they were relatively basic skills, technical skills, applied and management informatic skills or information brokerage skills. Interestingly, in all countries apart from Romania it was information brokerage skills that dominated with only basic digital skills also always present. In Romania, digital skills were not asked for. Applied and management information skills were well represented only in UK and Germany.

In Annex 3 of this report we present the results of further analysis on trends and changes to job adverts in the Arts and Culture sector (plus as before the Care Sector – dealt with in a separate report). These compare results from pre-Covid (2019) to Covid (2020) and unsurprisingly we see some major changes.

In Romania we see a 40% drop in job adverts in the sector and the only sub-sectors with an increase in adverts are in association with broadcasting and 'other arts teachers' which may reflect the new demand for online teaching.

In Germany the drop is slightly smaller (20%) with major drops in adverts for people engaged in theatre, film, visual artists and musicians. There was a small increase in the demand for photographers.

In Italy we also see a drop of around 20% with most roles in the sector impacted to a similar degree – apart from increases in adverts for actors, photographers and creative and performing artists 'not elsewhere classified' – this last category quite possibly picking up the arrival of more virtual/digital roles in the sector.

In the UK we see a relatively small drop in adverts in Creative arts and entertainment activities and a considerably larger one in libraries, archives and museums (nearly 50%) (only the UK also asked for this sub-sector). Most subsectors see a drop, though again with photographers as an outlier.

In Spain, we see a considerable (30%) drop in job adverts though notably the sub sector - creative and performing artists 'not elsewhere classified' – again shows a marked increase – again indicating that this is possibly picking up the arrival of more virtual/digital roles in the sector.

Survey Respondents

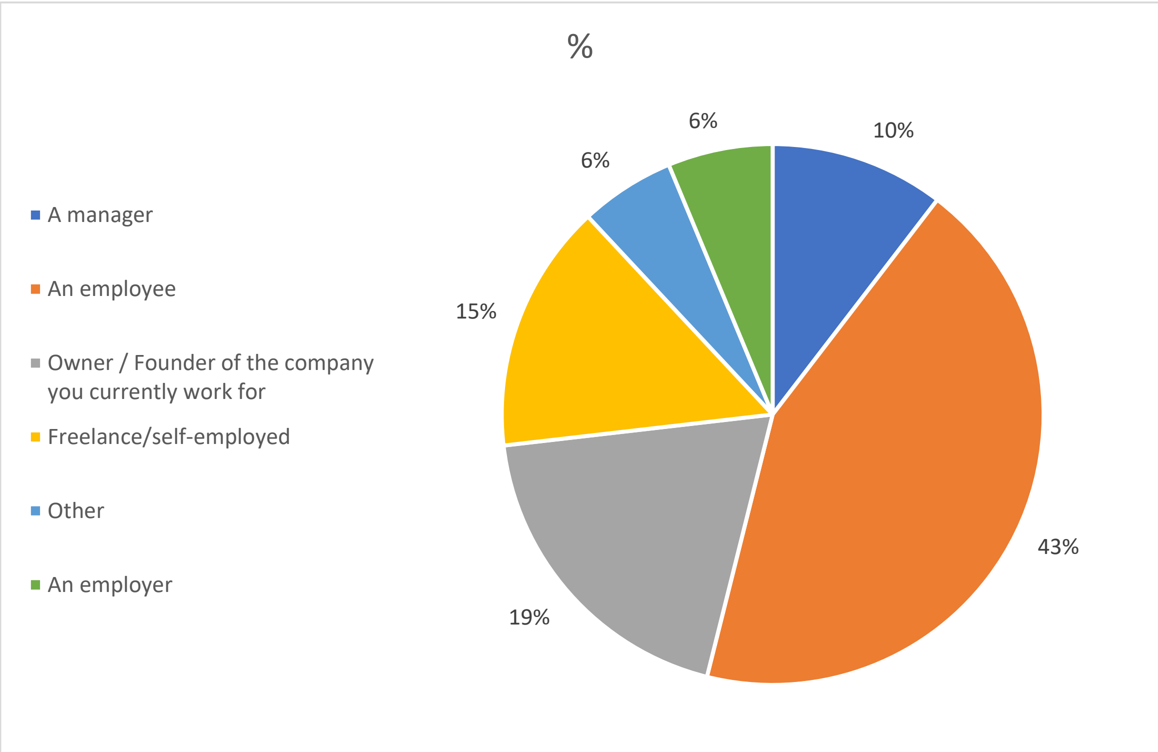
Between the five participating countries, a total of 846 survey responses were received, ranging from 326 in Germany to just 21 in Italy:

- Germany - 326 responses
- Italy - 21 responses
- Spain - 151 responses
- Romania - 124 responses
- Great Britain - 224 responses

Figure 1 shows that of the 846 completed responses, 10% were managers within their organisation, while the largest group was employees, accounting for 43% of all responses. Owners / founders of the businesses they were working in accounted for a further 19%, while freelancers made up 15% of responses, the majority of which were self-employed artists.

There are clear differences shown in the employment structures of the different European countries (Annex 1). Especially in Germany, the share of respondents working as an employee is very high compared to the other investigated countries, ranging at 71%. Noteworthy is also the share of employers in Romania, which with 22% is the highest share in the countries of interest. Other than that, different employment types are equally mixed throughout the different countries.

Figure 1: Responses by Employment Status *(Based on 846 completed responses)*



In terms of size of organisation, Figure 2 shows that the majority of respondents were employed in small enterprises. Just under 20% were one-person organisations, over a third (36%) were in organisations with less than 10 employees, and a further 23% in organisations with 10-50 employees. Just 8% were in large organisations with more than 250 employees. This reflects the nature of the sector and its dominance by small enterprises.

Concerning the number of employees in the different organizations, there are a lot of international similarities (Figure3). The share of participants working in a one-man-company is similarly high in Great Britain, Romania, and Spain, ranging between 21 and 26%. Moreover, the share of respondents working in small organizations up to ten persons is relatively high in Spain and Great Britain (around 48% in both countries) compared to the other countries. In Germany and Italy, bigger organizations with more than 250 employees are more widespread than in the other participating countries.

Figure 2: Responses by Size of Organisation *(Based on 778 completed responses)*

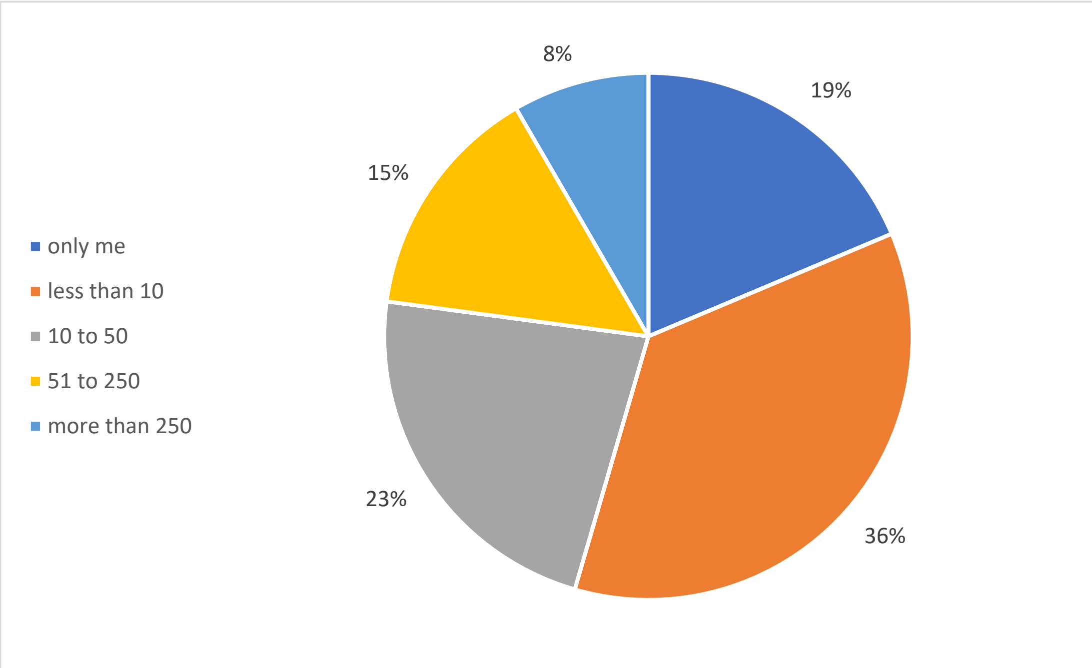


Figure 3. Size of organisations responding *(Based on 778 completed responses)*

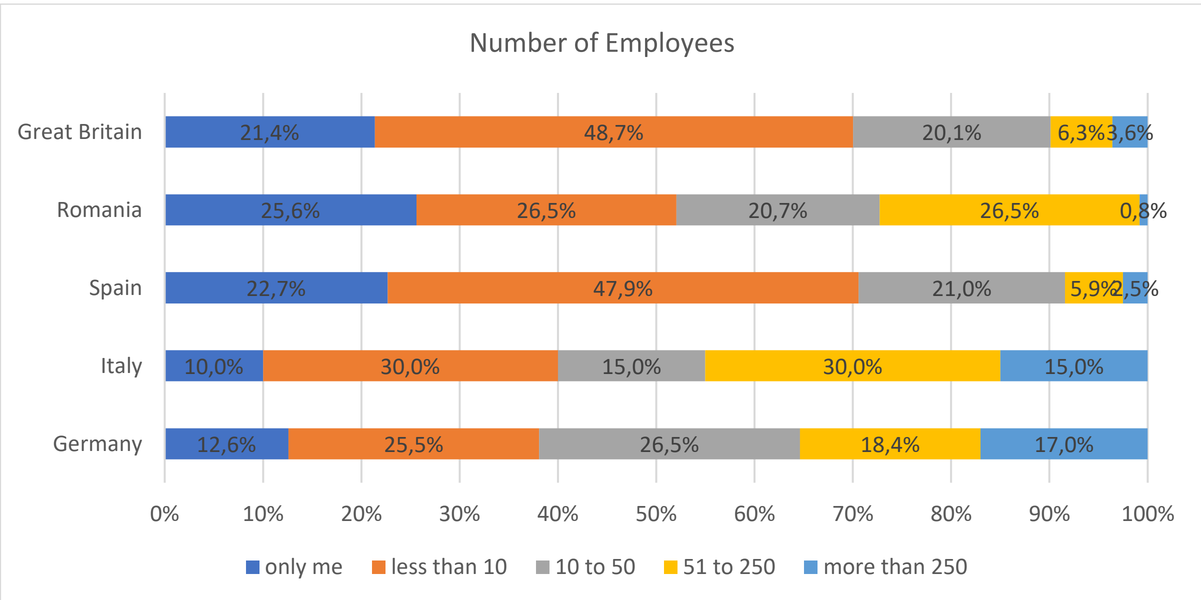


Figure 4 shows that almost half respondents were in well-established enterprises that had been in existence for over 20 years, a further 21% had been operating since the 2000s, with just 3% having been established since the pandemic began. In Germany, where the question was worded differently, similar results were returned, with 87% of organisations having been established for more than 20 years with less than 2% having been established in the last five years.

Figure 3: Length of time operating in this field of business *(Based on 436 completed responses, not including Germany)*

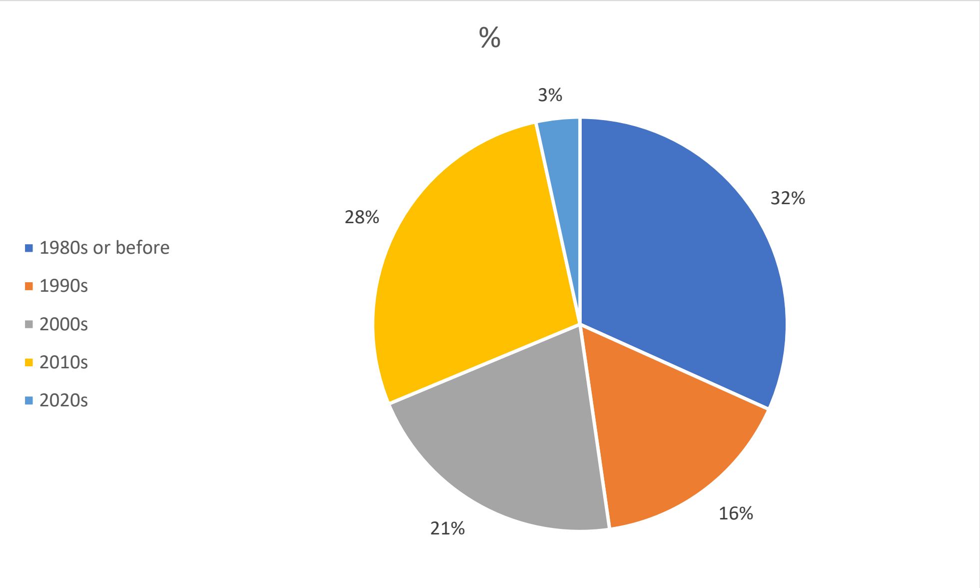
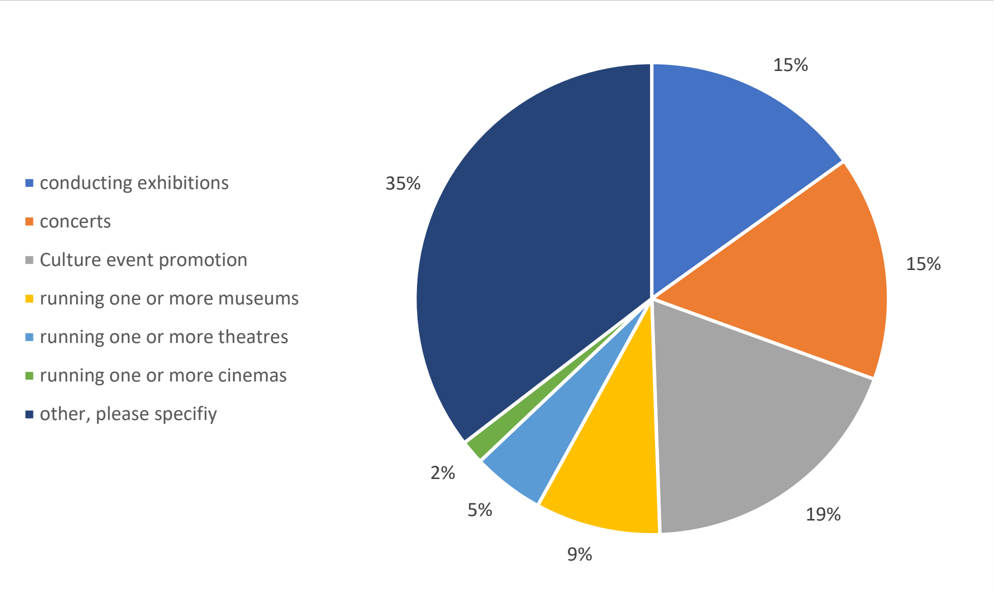


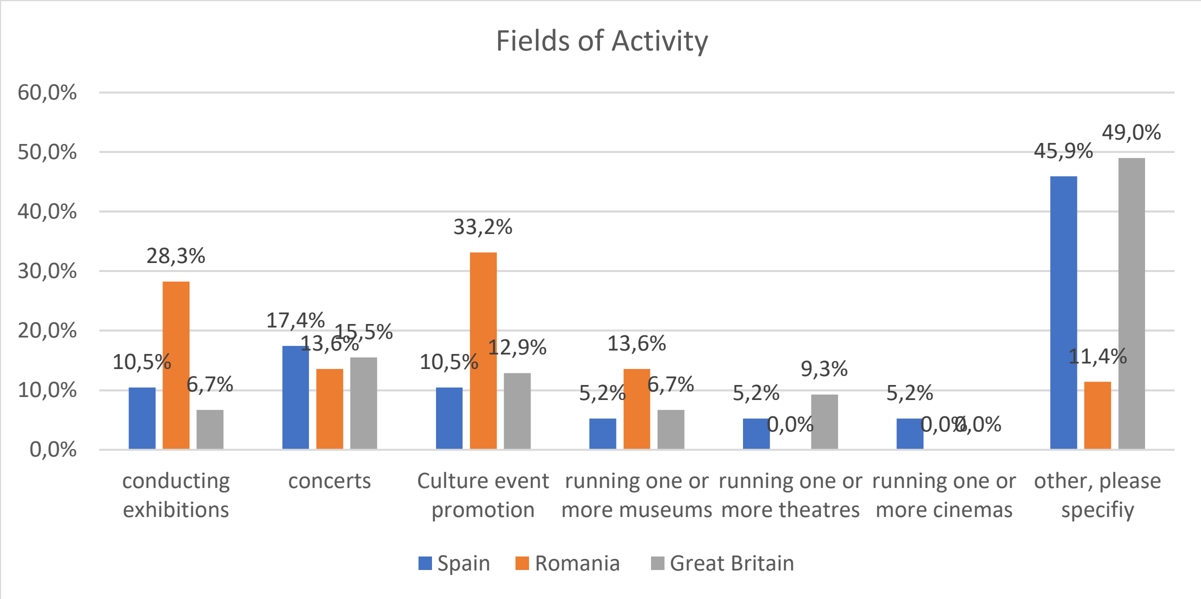
Figure 4 shows that just over half of all respondents classified the main activity of their organisation as 'other' suggesting a range of activities that didn't fit neatly into the categories provided. 'Other' responses included theatrical companies, artists, literature developers, training suppliers, dance schools and broadcasters.

Figure 4: Which field organisations are working in *(Based on 550 completed responses, not including Germany or Italy)*



This question was categorised differently in both Germany and Italy, and the results for those countries are shown in Figure 5 and Table 1 below.

Figure 5. Fields of Activity



Respondents were also asked, in which fields they work. While the Spanish and the British data is quite similar in many points, the Romanian values stand out. Most of the Romanian respondents work in culture event promotion (33,15%) or conduct exhibitions (28,26%). Meanwhile most of the Spanish and British respondents does not work in any of the given categories. Germany and Italy chose to use different categories in their questionnaires. Most respondents from Germany work in libraries and archives (23%), the performing arts sector (22%), and theatres or other artistic facilities (16%). Many respondents from Italy work in fields that support artistic representations (31%), in recreation and entertainment (22%) and other fields which are not fitting the given categories (26%).

Table 1: Which field organisations are working in *(Germany and Italy results)*

Germany	No.	%	Italy	No.	%
Performing arts and related services (e.g. production and performance of plays, operas, concerts, dance and other stage performances/activities of directors, producers, stage designers, stagehands, lighting technicians)	88	22%	Artistic representations	2	9%
Fine arts (e.g. artistic activities such as sculpting, painting, drawing, engraving, restoration, writing)	31	8%	Support activities for artistic representations	7	30%
Theatre, concert hall, other facility for artistic performances	62	16%	Management of artistic structures	0	0%
Activities in the field of words (e.g. journalistic activities, author, editor)	5	1%	Artistic and literary creations	1	4%
Activities in the field of music (e.g. musician, composer, conductor)	39	10%	Activities of libraries and archives	1	4%
Museum	54	14%	Management of historical places and monuments and similar attractions	1	4%
Libraries and archives (documentation and information activities of all kinds)	91	23%	Recreation and entertainment	5	22%
Historic Site/Buildings	6	2%	Other (specify)	6	26%
Botanical or zoological garden	14	4%	**Total**	**23**	**100%**
Galleries and exhibitions	9	2%			
Total	**399**	**100%**			

Survey Results

Use of Digital Technologies

Figure 6 shows the extent to which survey respondents (from Spain, Romania and Great Britain) use technology for different purposes, with the most frequently cited uses being:

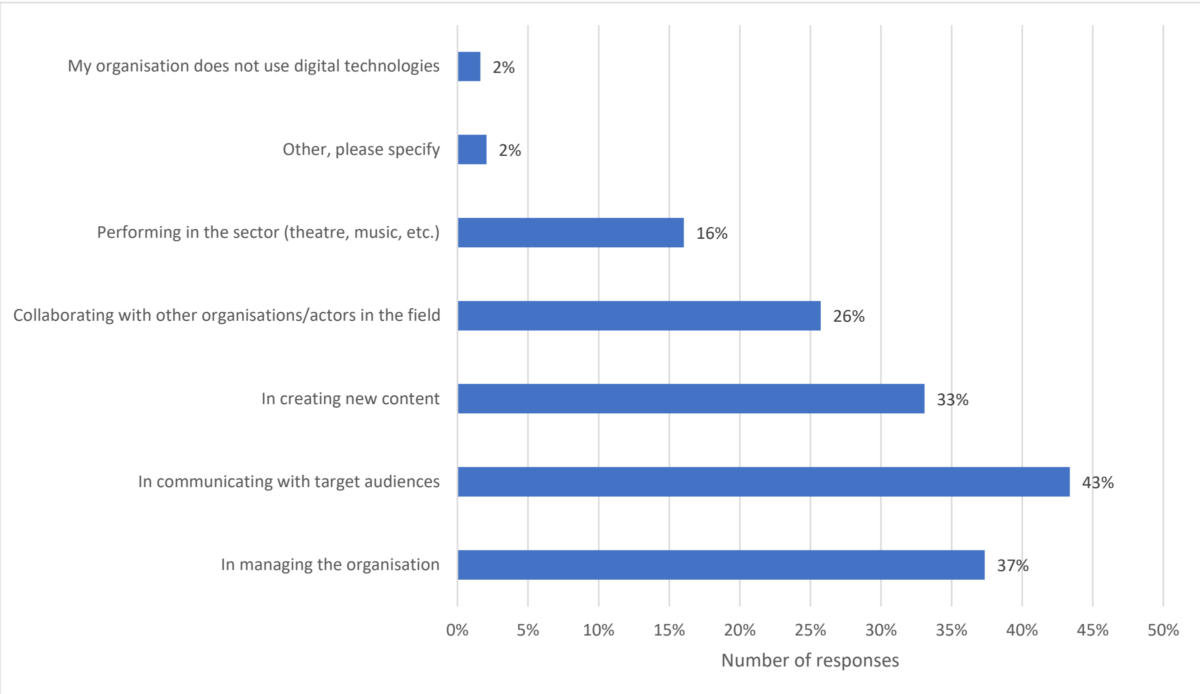
- In communicating with target audiences – 43% of respondents
- In managing the organisation – 37%
- In creating new content – 33%

Just under half use digital technology for collaborating with other organisations/actors in the field, while a third use it for performing.

98% of respondents used digital technology in some way, with just 2% not using digital at all.

Whilst this reflects a high level of adoption across the sector for generic use of digital media (communications and administration) there seems to be scope for increasing this – including in areas related to the delivery of service and performance.

Figure 6: Use of Digital Technologies (*Base: 680 responses. Respondents could select more than one answer. Doesn't include Germany or Italy*)



Organizations show differences in the fields in which they use digital technologies. A high number of Spanish participants are using digital technologies for management purposes (35%), which is significantly more than in Romania and Spain. Also, it is noteworthy that almost 10% of the Spanish respondents answered that they do not use digital technologies at all. This number is significantly lower in all other countries. Participants from Great Britain (20,4%) and Romania (23,9%) are using digital technologies to create new content more than those from Spain (12,6%) and Germany (14%). Germany and Italy again chose different categories than the rest.

Most respondents (at least 86%) find that digital skills are important or as in the Italian terminology useful at the moment. A slight difference can be seen in the British data. Only 42,2% think that digital skills are very important, while in Romania and Spain the shares lie at around 62%.

Although the answer categories were slightly different in the German and Italian questionnaires, similar results emerged in that communication with audiences, internal management and content creation were again among the business activities where digital skills were most frequently used (see Table 2).

Table 2: Areas in which the organisation makes use of digital technologies *(Germany and Italy results)*

Germany	**No.**	**%**	**Italy**	**No.**	**%**
creating new content	198	61%	Management	9	43%
internal cooperation	218	67%	Communication area with the public	6	29%
external cooperation	212	65%	Provision of services (e.g. online booking and ticket sales, virtual tours, remote participation in performances, concerts, events)	7	33%
performing in the sector (theatre, music, etc.)	100	31%	For coordination with different artists	5	24%
sharing content	199	61%	Coordination with other organizations in the sector	7	33%
communication with target audiences	200	61%	Communication and content area: creation of new digital content	8	38%
managing the organisation	233	71%	Coordination with technical services	2	10%
other, please specify	28	9%	We do not adopt digital technologies	2	10%
Total	**326**		To date we do not adopt digital technologies but we are planning to do so	1	5%
			Other	1	5%
			Total	**21**	

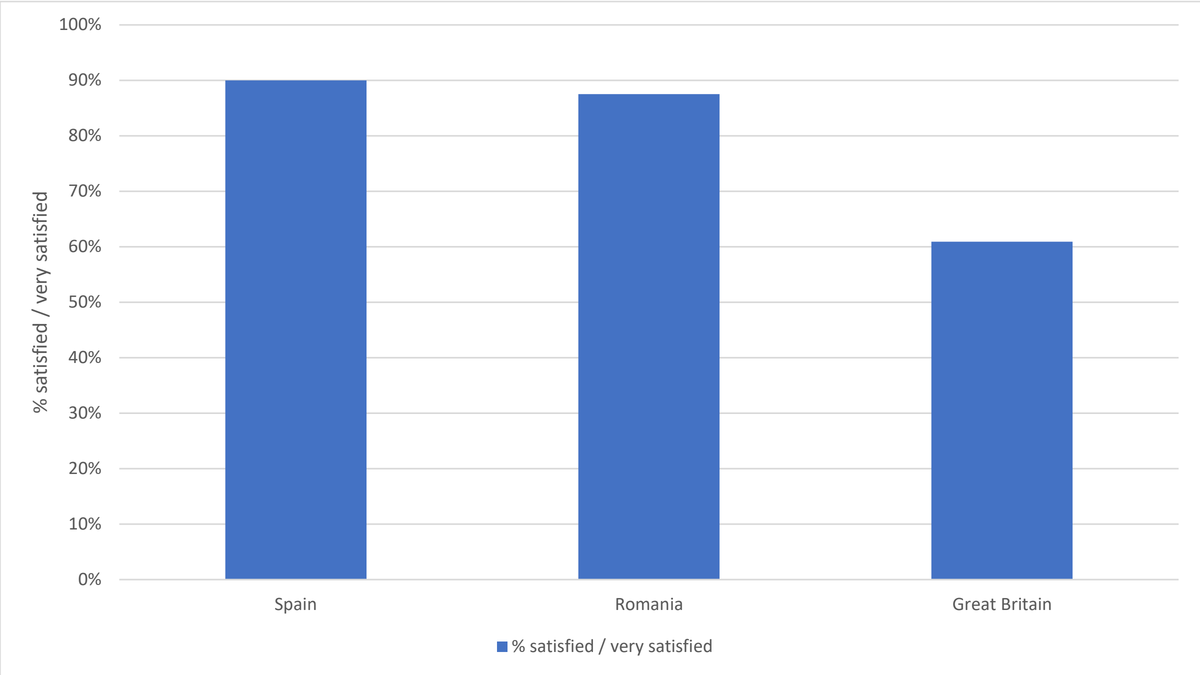
Customer Satisfaction

Respondents were asked how about their perception of how satisfied customers are with the digital services provided.

Figure 7 shows that around just 60% of respondents in Great Britain thought that customers were satisfied, compared to 88% in Romania and 90% in Spain (no data for Germany or Italy).

Given the nature of the sector, the high levels of satisfaction with digital services provided by respondents seems positive and relatively reassuring.

Figure 7: Perceived customer satisfaction of digital service offering



Digital skills – growing importance over time

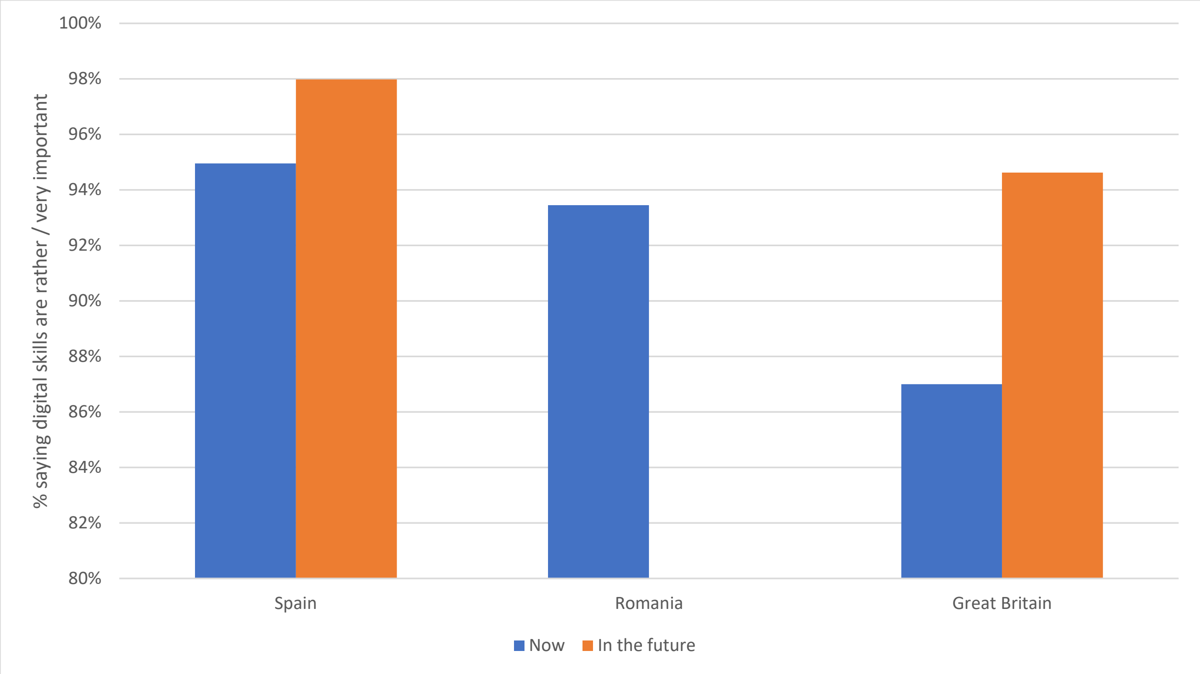
Figure 8 shows how important respondents think digital skills are, both presently and in the future. It shows that there is a broad consensus that digital skills are already crucial to the arts and cultural sector and will only become more important in the future.

In Great Britain, at present, 87% of respondents thought digital skills are very or extremely important, a figure that rises to 95% when looking to the future.

In Spain, the corresponding figures were 95%, rising to 98%.

At present, 93% of respondents in Romania think digital skills are very / extremely important (no data presented for Germany or Italy).

Figure 8: Importance of digital skills, now and in the future *(Base: 223 responses)*



Pandemic Impact on Digital Skills

All countries reported that the pandemic had impacted on the majority of organisations in terms of adoption of digital tools and / or technologies to deploy working tasks in the organisation in general.

Figure 9 shows that digital technology has seen an increase in use across several areas of arts and cultural organisations' activities, with communication (both internally and with clients) being among the most frequently cited area of increased use, typically at around two thirds of respondents.

Around half of respondents in Germany, Italy and Spain stated that they were using digital more for creating new content, lower than in Romania and Great Britain (at 67-68%). Are two thirds were collaborating more with others in the same field, other than in Spain (48%).

Increasing digital use for management / administration was less common (typically at just under half of respondents), as was performing in the sector, although this was lower in Germany and Spain at 32-34%.

It is actually the higher figures here that are something of a surprise. Most sectors would have anticipated using digital even more for communications, collaboration and perhaps new content as a result of the Pandemic, than seems to be the case here.

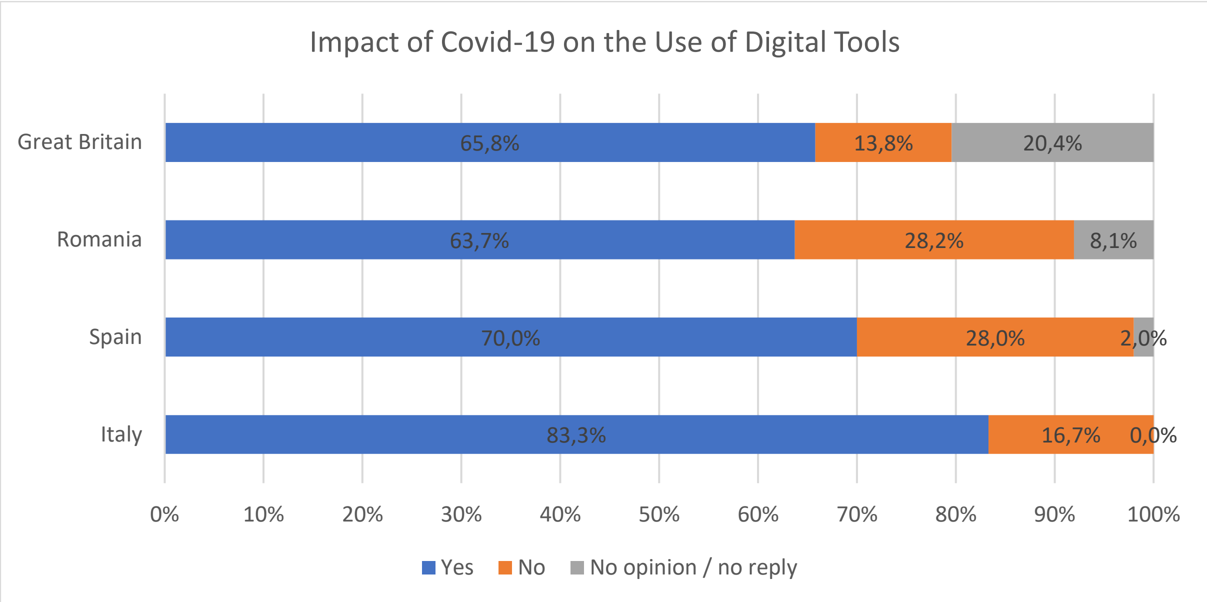
Table 3: Areas where digital skills are being used more since pandemic (%)

Area of Use	Germany	Italy	Spain	Romania	Great Britain
Management	40%	67%	42%	46%	53%
Communication (internal / with colleagues)	65%	65%	53%	63%	67%
Communication (with clients and stakeholders)	-	76%	65%	77%	68%
In creating new content	51%	56%	51%	68%	67%

Collaborating with other organisations/people in the field	-	67%	48%	63%	65%
Performing in the sector (theatre, music, etc.)	32%	56%	34%	52%	61%
Other	63%	-	45%	42%	32%

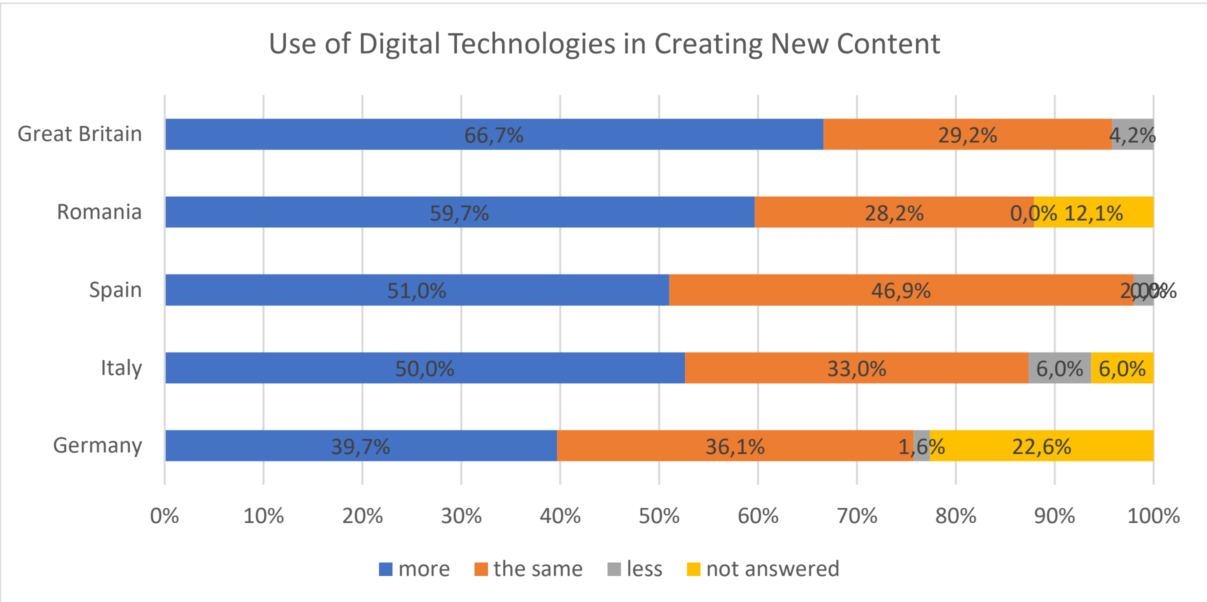
Figure 9 illustrates COVID impact on the use of digital tools

Most respondents, at least 63,7%, state that the Covid-19 pandemic had an impact on the use of digital tools and/or technologies in the deployment of working tasks in their organization (Figure 9.).



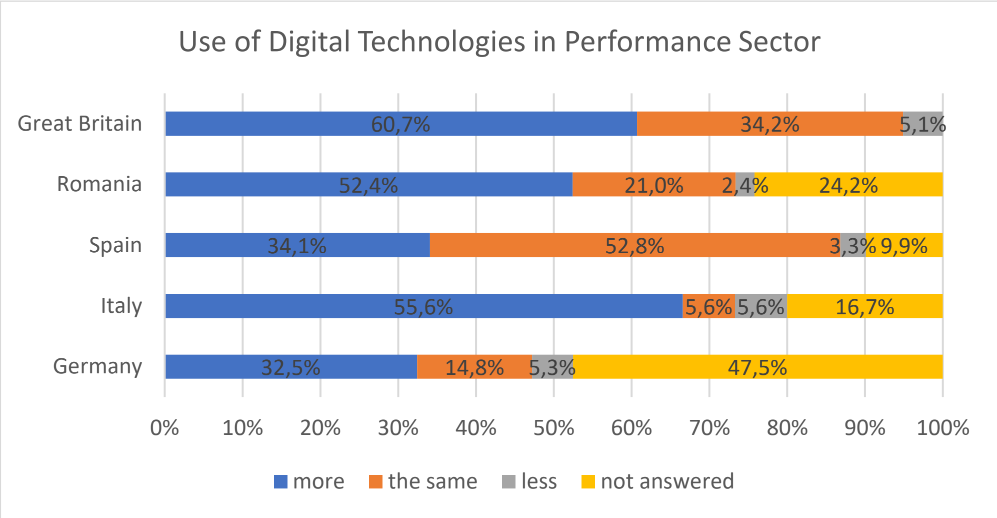
Organizations also show differences in the usage of digital technologies to create new content (Figure 10.). While in Great Britain, two thirds of the respondents use more digital technologies to create new content, only 39,67% do that in Germany.

Figure 10. Use of digital technologies to develop new content



Especially in Spain, the usage of digital technologies in the performance sector stayed the same. However, the shift to a usage of more digital technologies is similar in Great Britain, Romania, and Italy, where it ranges between 52 and 61% (Figure 11).

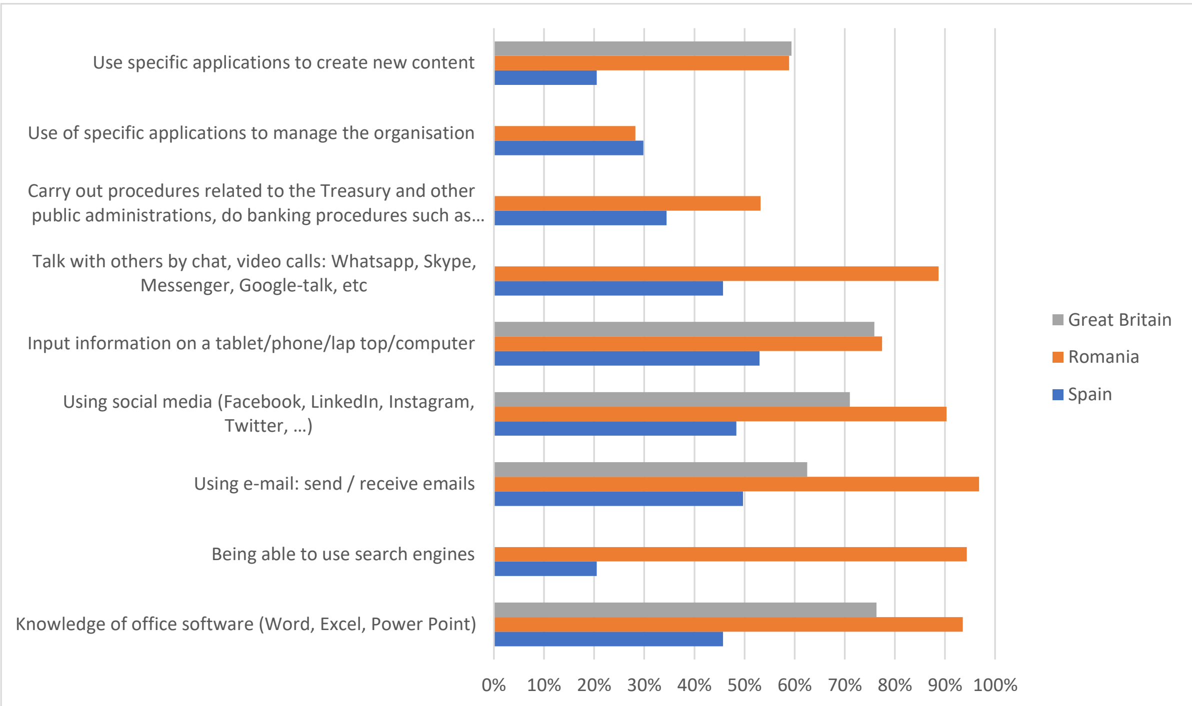
Figure 11. Use of Digital Technologies in Performance



Digital Skills needed for employment in the sector

Figure 12 shows that, unsurprisingly, use of ICT hardware and standard office software are the most common areas of use of digital skills, with the majority of respondents citing both these areas of use. Use of social media was also very common. From the data supplied, survey results suggest that digital skills are most in need in Romania, with lower requirements in Spain.

Figure 12: Digital skills most needed to perform the organisation's daily operations (%) *(No data for Germany or Italy)*



Basic/Essential Digital Skills – Employer Size and Employee Age

Basic digital skills may well be a concern for the sector – as 21% of respondents (no data for Germany) saying that at least a quarter of their employees lacked basic digital skills (defined as being able to use search engines; using communication tools - send / receive emails - talk with friends and family by virtual chat, video calls - Whatsapp, Skype, Messenger, Google-talk etc).

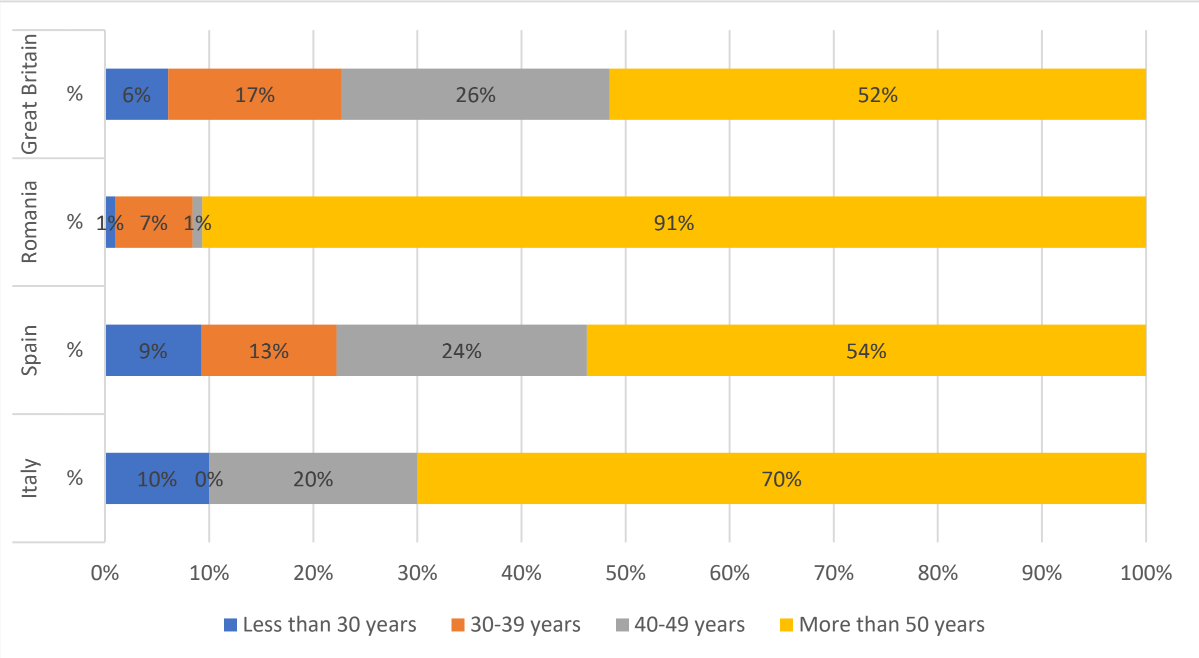
There was some variation by country, with this level being 14% in Spain and 16% in Great Britain, rising to 28% in Romania and 46% in Italy (although this is based on a very small sample of responses).

9% actually stated that more than three quarters of their employees lacked these basic digital skills. Again this was lower than average in Spain (3%) and highest in Romania (16%).

Detailed data analysis for Great Britain showed that those with the highest proportion of employees lacking basic skills were mainly small organisations. Delivering skills to smaller employees has always been more problematic than to larger ones. Suggesting that this maybe a problem that will be difficult to tackle across the sector.

Respondents were also asked about the predominant age range of employees in the organisation that they perceive do not have this same range of basic digital skills. Figure 9 shows that respondents thought that older workers over the age of 50 were the age group most perceived to be lacking skills, accounting for 70% of respondents across Italy, Spain, Romania and Great Britain, with a particularly high percentage reported in Romania (91%)

Figure 13: Perceptions of predominant age group where basic digital skills are lacking (%) *(No data for Germany)*



Staff Development and Digital Skills

Excluding Germany, 64% of all organisations with employees stated they were involved in the development of their staff's digital skills, with in house training being the most common form of involvement (39%), while 17% said they had used external trainers. These figures are high and indicate a sector that is actively developing new digital competences.

By country, employers arranging training was higher in Great Britain (73%) and Spain (72%), than in Romania (48%) and Italy (43%).

Barriers to Improving Digital Skills

In terms of the barriers encountered in attempting to improve digital skills, the key issues identified were a lack time and funding, as shown in the table (Table 4) below. Clear areas for potential action are to address the lack of expert advice and in-house knowledge – quite possibly through better signposting as many training opportunities do exist.

Table 4: Barriers encountered in acquiring digital skills (%) *(Base, all respondents)*

Barrier	% Agreeing / Strongly Agreeing
Lack of time	64%
Lack of in-house staff time	62%
Lack of funding to allocate to digital	57%
Difficulty in accessing external funding for digital projects	56%
No senior manager with a digital remit	50%
Lack of strategy and planning	47%
Lack of IT-expert advice	47%
Slow/limited IT systems/networks	45%
Lack of understanding of how to budget digital projects	41%
Lack of in-house knowledge	41%
Lack of understanding what digital technologies can do	37%
Lack of technical control over your own IT systems/networks	36%
Lack of suitable external IT knowledge suppliers	30%
Lack of in-house IT competence	27%
Digital not valued in organisation	21%

Table 5 below shows how extensive these barriers were across each of the participating countries.

Table 5: Barriers encountered in acquiring digital skills by Country (% agreeing / strongly agreeing) *(Base, all respondents)*

Barrier	Germany	Italy	Spain	Romania	Great Britain
Lack of funding to allocate to digital	54%	88%	61%	54%	65%
Lack of in-house staff time	66%	73%	69%	40%	70%
Difficulty in accessing external funding for digital projects	54%	91%	61%	45%	64%
No senior manager with a digital remit	61%	82%	41%	26%	41%
Lack of in-house knowledge	51%	57%	25%	22%	40%
Slow/limited IT systems/networks	55%	58%	30%	32%	37%
Lack of IT-expert advice	54%	-	56%	27%	38%
Lack of suitable external IT knowledge suppliers	34%	-	30%	26%	22%
Lack of in-house IT competence	25%	-	40%	24%	27%
Lack of technical control over your own IT systems/networks	43%	-	32%	28%	28%
Lack of strategy and planning	56%	77%	52%	21%	40%
Lack of understanding what digital technologies can do	44%	43%	42%	20%	30%
Digital not valued in organisation	26%	36%	9%	23%	10%
Lack of understanding of how to budget digital projects	43%	67%	61%	25%	38%
Lack of time	67%	62%	78%	44%	67%

Note: This question was posed as a simple yes / no question in Italy, rather than an extent of agreeing.

In terms of what would have been most helpful in overcoming these barriers, financial aid from the State was regarded as being the biggest help, cited by 61% of respondents. Collaboration with other people and organisations in the same field was only slightly lower at 60%, with networking, in order to raise awareness of potential sources of technical and managerial support, mentioned by 58%.

By country, respondents from Great Britain were generally less likely to agree that any of the options stated would have helped address barriers to digital, compared to other countries.

Table 6: Options that would have helped in addressing the barriers to digital take up during the pandemic (% agreeing) *(Base, all respondents)*

Country	Collaboration with other organisations in the same field	Financial aid from the State	Networking. in order to raise awareness of potential sources for technical and managerial support
Germany	58%	49%	49%
Italy	73%	87%	87%
Spain	75%	88%	87%
Romania	78%	76%	90%
Great Britain	33%	59%	43%
All	**60%**	**61%**	**58%**

Respondents' views on Digital Skills and Responsibilities for their Acquisition

Only a fraction of respondents (5%) do not use digital skills in their work and see no need to develop them post-Pandemic. More than half of respondents stated that it is the responsibility of individuals to develop their own skills though 82% cited it was the responsibility of organisations to provide employees with new skills. The majority therefore agree that both have a key role here. Though the difference between the figures does point to an industry recognition that the role of the employer is particularly pivotal here.

At least 47,8% of the respondents in all countries that included this statement in their questionnaire agree that it is the responsibility of the employees to acquire new skills. Nevertheless, an even bigger number of respondents (at least 75%) also agrees on the statement that it is the responsibility of the organization to provide their staff with new skills.

While participants from Great Britain, Romania and Spain feel confident to master newly needed digital skills, the respondents from Italy seem to feel the exact opposite.

Table 7: Agreement with statements regarding digital skills (%) *(Base, 393 respondents)*

Statement	% Agreeing / Strongly Agreeing
Once the pandemic is over, there will be no more need for digital skills in my work	5%
Digital skills are here to stay	94%
It is the responsibility of individuals to acquire new skills	54%
It is the responsibility of organisations to provide staff with new skills	82%
Freelancers and the self-employed need support from external training providers	70%

Note: No data for Germany

Between countries, the levels of agreement with each statement were very consistent.

New Digital Systems and Processes

In terms of new digital systems and processes that are likely to be introduced as a result of the pandemic (Table 3), by far the most commonly planned new activity is the posting of video / audio content for downloading or streaming, cited by 35% of respondents. Educational content was the second most common response, at around 30%. Less than 20% said they were planning to accept online donations, and the use of crowdfunding platforms was much less common at just 10%.

The sector is clearly learning from the Pandemic and has plans to modify how it works. There is a really large spread of activity with a focus on online content and using digital to reach audiences.

Table 8: As a result of the COVID-19 pandemic, are you planning to implement new or additional digital systems and / or processes? (%) *(Base. All respondents)*

System / Process	**%**
Post video/audio content. either for download or streaming	35%
Provide educational content or online events for schools and other audiences	30%
Conduct simulcast/livestream performances and events	25%
Search engine optimisation	24%
Accept online donations	17%
Digital experiences designed to be used alongside and at the same time as the artwork or exhibitions (e.g. apps or interactive games)	14%
Sell products or merchandise online	11%
Maintain a blog with commentary and cultural criticism	11%
Provide educational interactive experience (including games) for schools and other audiences	11%
Digital works that are connected to an exhibition or artwork. but that offer a distinct experience rather than a recreation of the real-world equivalent	10%
Use crowdfunding platforms to raise money for new projects	10%
Offer exclusive online content as an incentive to encourage people to take up membership of your institution	9%
Other	1%

By country, results suggest that plans to implement new / additional digital aspects to operations were generally lower in Germany than the other participating nations, particularly with regard to posting video / audio content, accepting online donations and use of crowdfunding.

Table 9 shows that there is a broad consensus that the pandemic has led to an increased need for digital skills and that it will be necessary to adapt to new digital skills requirements. Confidence that they could adapt to new digital skills requirement was not universal (at just under 70% of respondents), but this increased to well over 80% of respondents in the context of receiving further training.

Nearly 10% felt that they did not feel confident that they could master newly needed digital skills – and this is a potential audience for future ACSOL work. Almost all respondents were confident that with support they could adapt to new digital requirements.

Table 9: Agreement / Disagreement with statements regarding changes in digital skills needs (% of respondents) *(Base. All Respondents)*

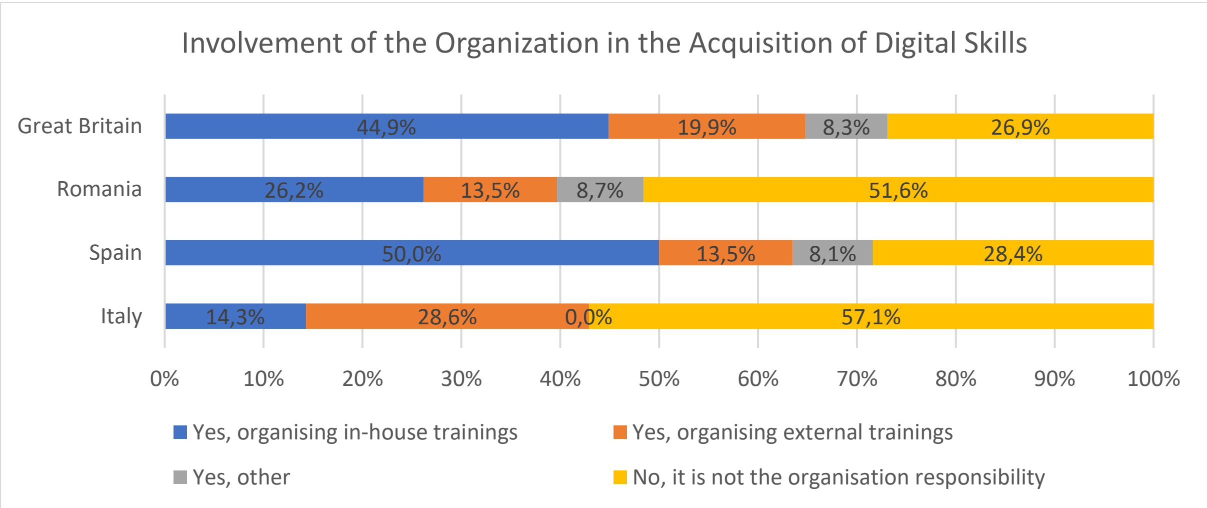
	Italy	Spain	Romania	Great Britain	All (except Germany)

I feel confident that I will be able to master newly needed digital skills					
Agree	20%	83%	99%	89%	89%
Disagree	80%	18%	1%	12%	11%
I will be able to adapt to new requirements with the help of further trainings					
Agree	100%	94%	97%	94%	95%
Disagree	0%	6%	3%	6%	5%
It will not be necessary to adapt to new digital skills requirements. since my work will turn back to normal after the pandemic					
Agree	7%	10%	15%	8%	10%
Disagree	93%	90%	85%	92%	90%
I have not seen any alteration in the digital skills requirement due to the pandemic					
Agree	15%	15%	27%	10%	16%
Disagree	85%	85%	73%	90%	84%

Digital Skills of the Members of Respondents Organizations

Respondents were asked at what level their organization was involved in the "development" and/or in fostering the adoption of digital skills within its members (Figure 14). In Italy and Romania, a high number of respondents (57,1% and 51,59%) thinks that this is not within their organization's responsibility. Also, compared to Great Britain and Spain, less respondents received in-house trainings. Around half of the respondents from those two countries received such training.

Figure 14. Involvement in Digital Skills



Barriers acquiring new digital skills

The participants were asked which barriers they face when it comes to the acquisition of new digital skills. In some cases, similarities can be seen (Figures 15,16 and 17). Most of the respondents of the above questions agreed that there is a lack of funding to allocate digital technologies. When it comes to the lack of in-house staff time, also at least 57,9 % agree that this is a barrier in the acquisition of new skills. Only in Romania, experiences seem to be different.

Figure 15 Lack of funding

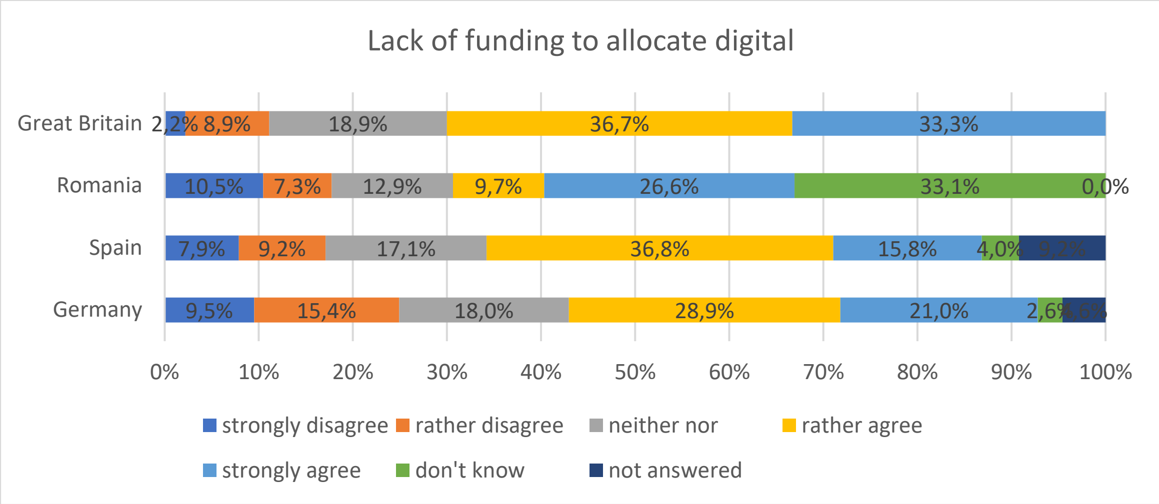
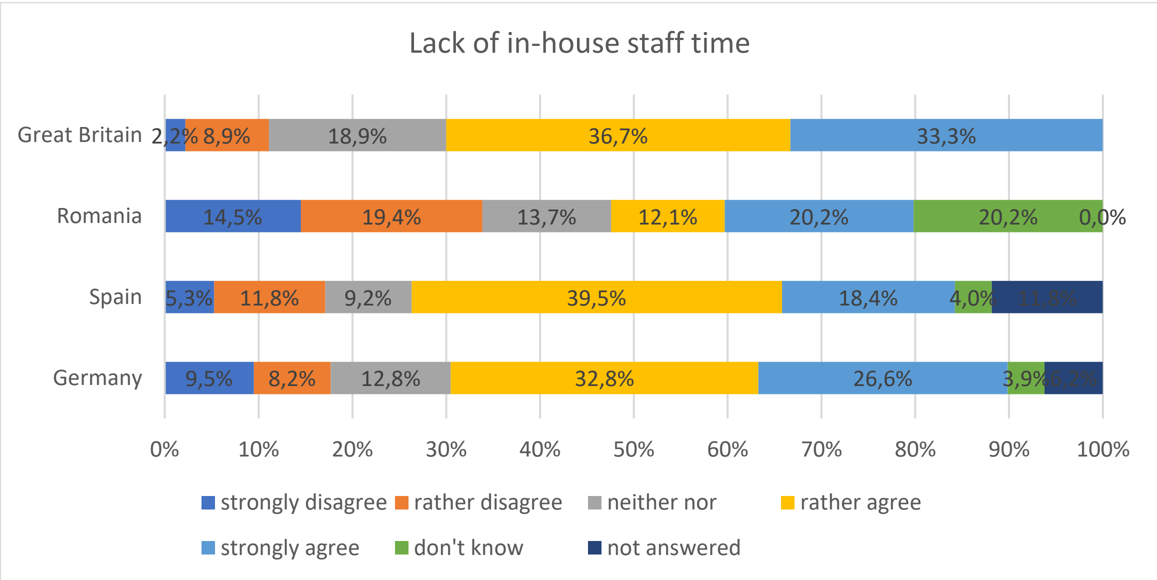
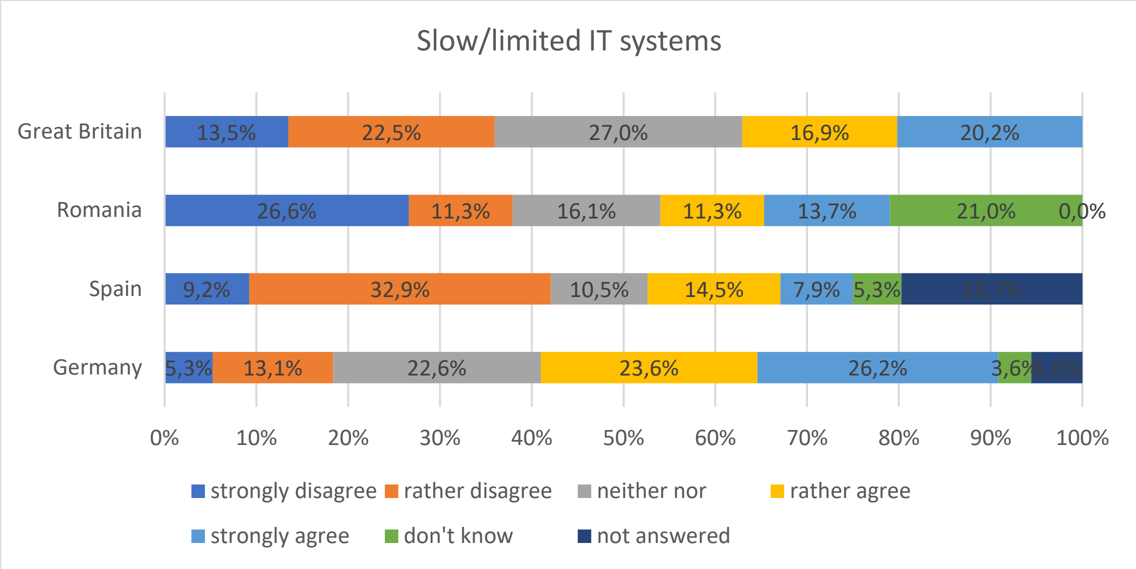


Figure 16. Lack of in-house staff time



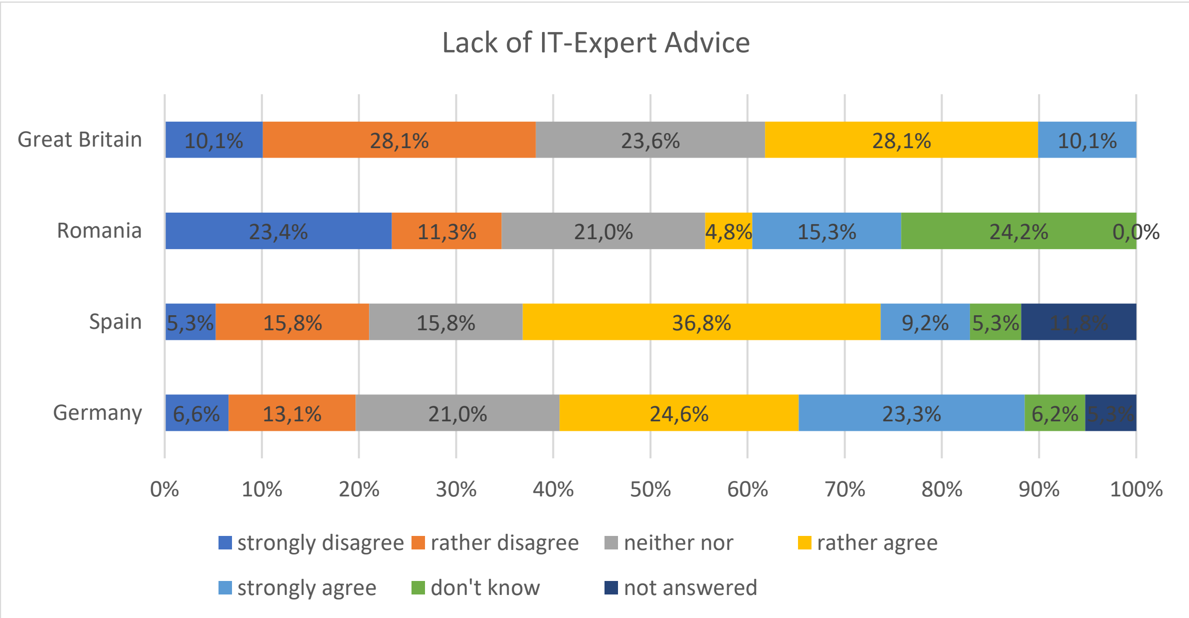
While around 40% of the participants from Spain and Romania disagree that slow or limited IT systems are a barrier for them, especially respondents from Germany seem to face a challenge when it comes to It systems. Over 50% of the German participants agree that slow IT systems are a barrier for the acquisition of new digital skills (Figure 17).

Figure 17 Slow/limited IT systems



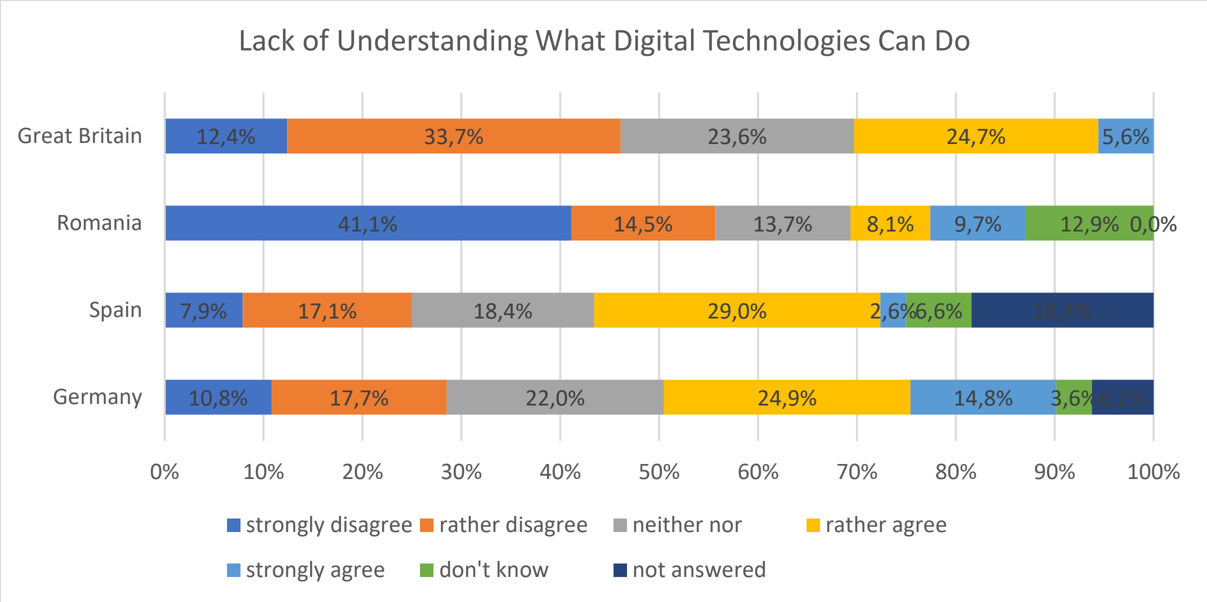
When it comes to the lack of IT-expert advice, the experience of Romanian respondents again differs from the rest. British respondents are ambivalent on that issue, while 47,9% of the German respondents and 46% of the Spanish respondents agree that the lack of IT-expert advice is a barrier for them (Figure 18).

Figure 18 Lack of IT-Expert advice



When it comes to the lack of understanding what digital technologies can do, most Romanian respondents disagree that this is a barrier to the acquisition of new digital skills. 41,1% even strongly disagree. Also British respondents mainly disagree that this a barrier for them, while there are more German respondents (39,7%) that agree that the lack of understanding what digital technologies can do is a challenge they face.

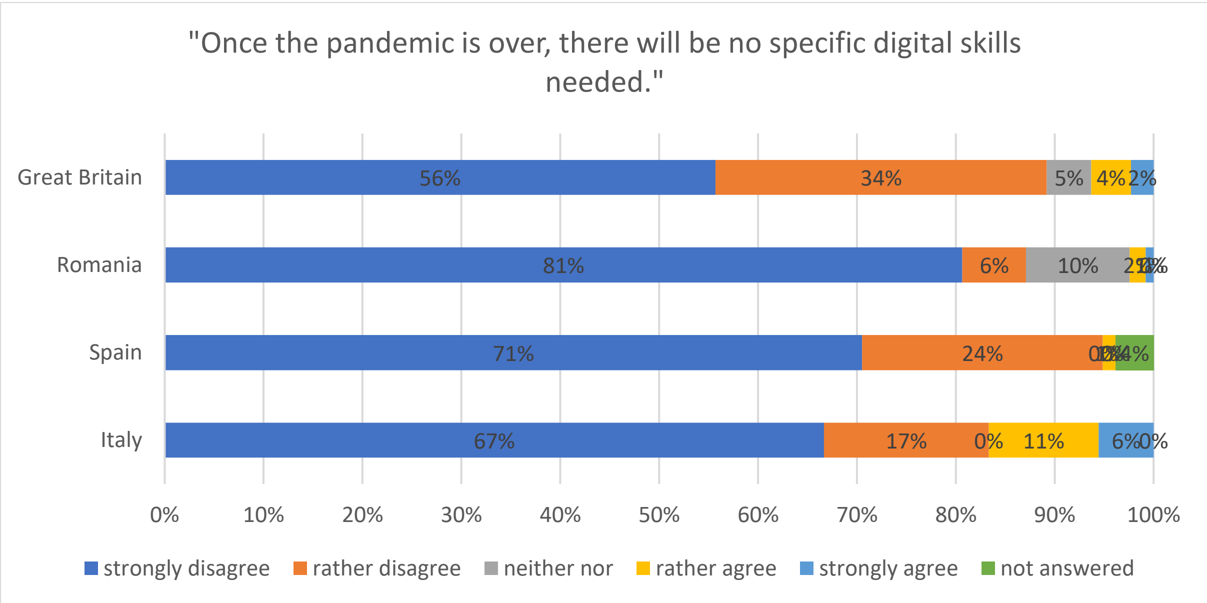
Figure 19. Lack of understanding of what digital technologies can do



Statements on Post-Pandemic Digital Skills

Many of the respondents, at least 84%, disagree on the statement that there will be no specific digital skills needed after the pandemic (Figure 20).

Figure 20. Statement on Post Pandemic Digital Needs



Participation in Training and E-learning

Across Great Britain, Spain and Romania around 70% of respondents reported some form of training activity in their organisation:

- Provision of in-house trainings - 22%
- Provision of opportunities for further education (external) - 16%

- Provision of time slots for self-study - 17%
- Other - 15%

In house training was most likely to be offered in Great Britain, with self-study opportunities the most commonly cited in Romania.

The proportion of respondents undertaking training who had undertaken some form of e-learning was as follows:

- Great Britain - 67%
- Spain - 75%
- Romania - 23%

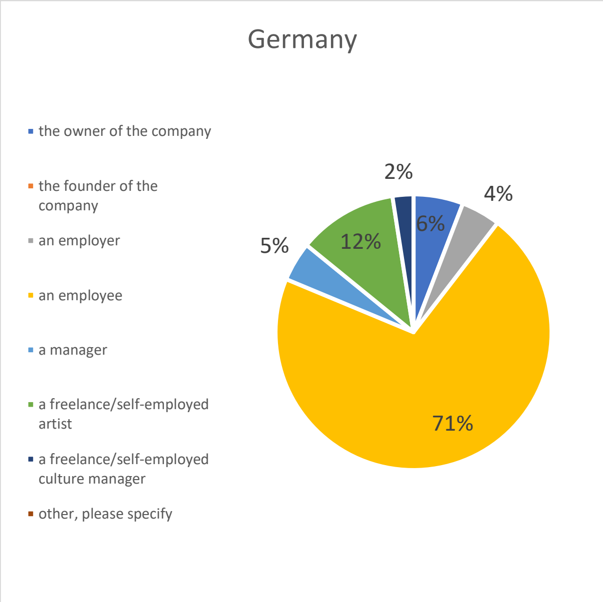
Experiences of e-learning were overwhelmingly positive across all participating countries:

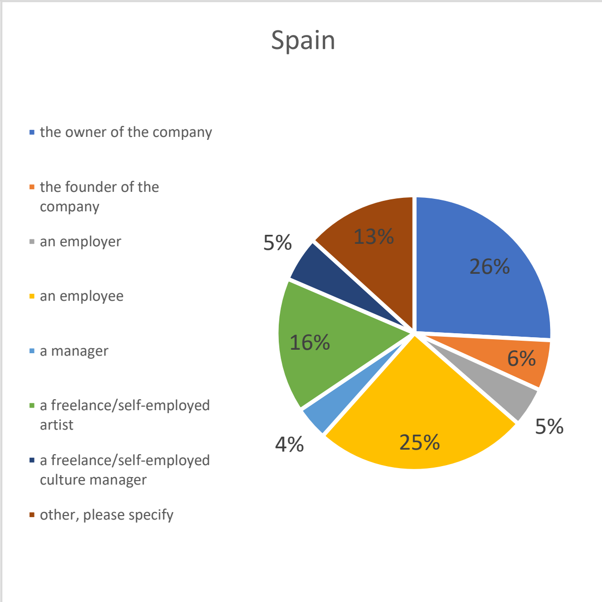
- Great Britain - 80%
- Spain - 76%
- Romania - 69%
- Italy - 75%

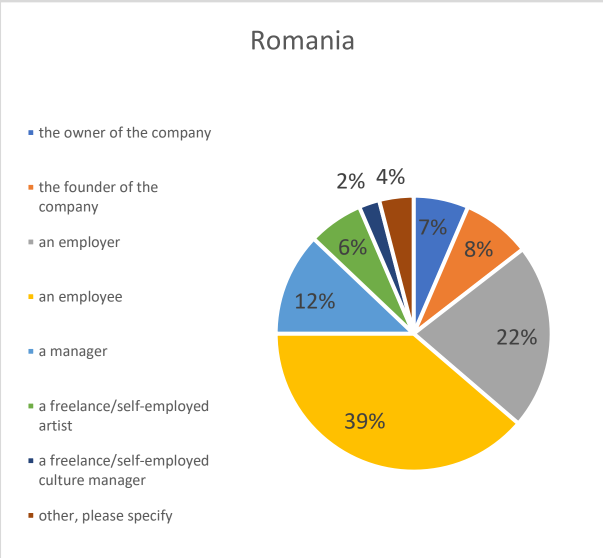
Of those respondents from organisations who had made use of e-learning, unsurprisingly given the generally positive experiences reported, the majority stated they felt that e-learning was useful for their organisation:

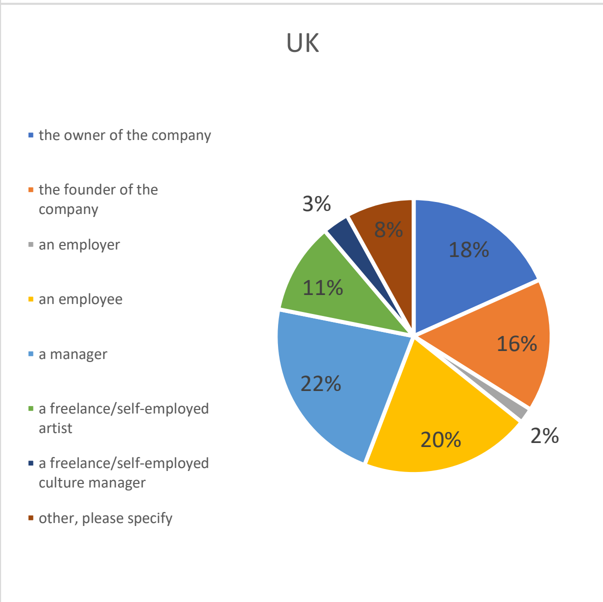
- Great Britain - 96%
- Spain - 94%
- Romania - 82%
- Italy - 86%

Annex 1. Role and Position of the Respondents



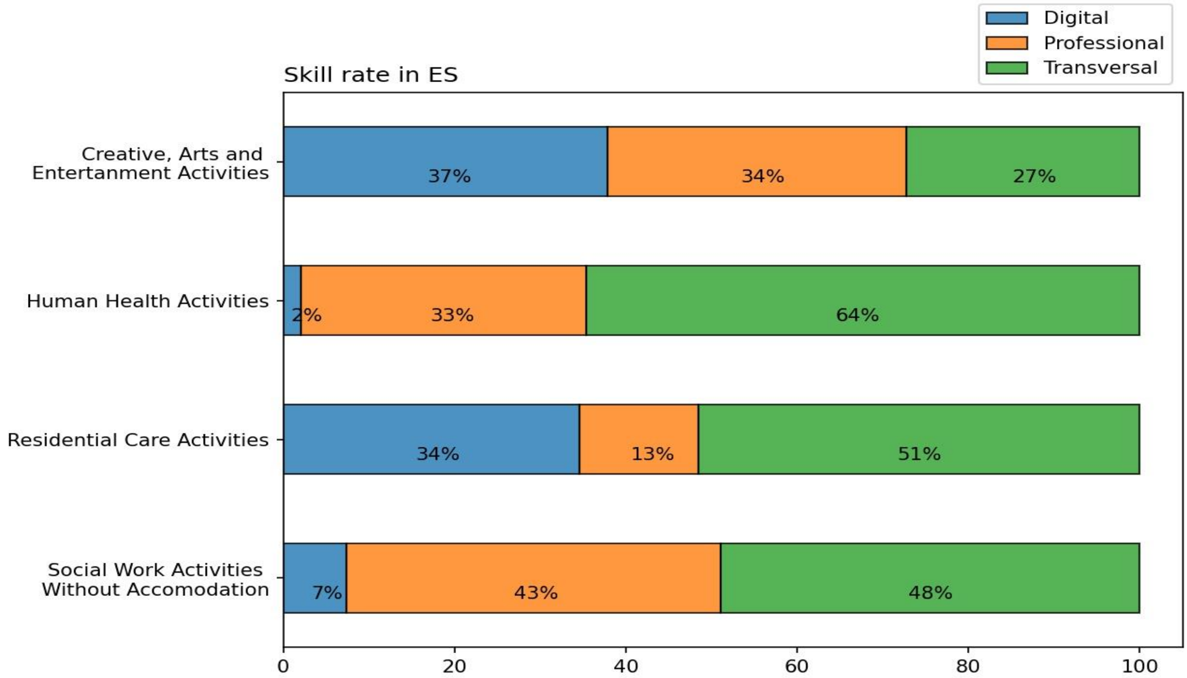


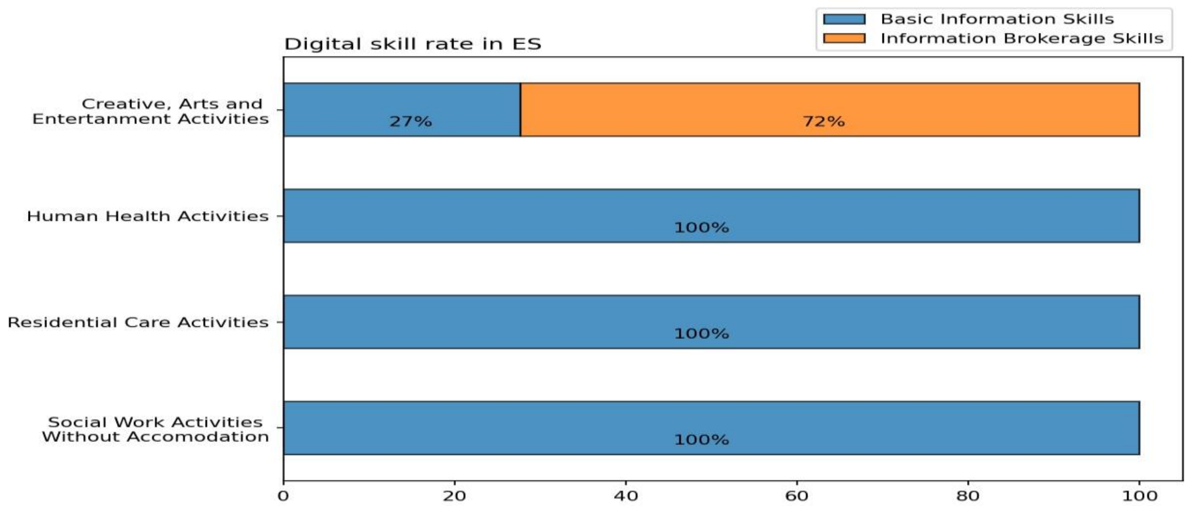




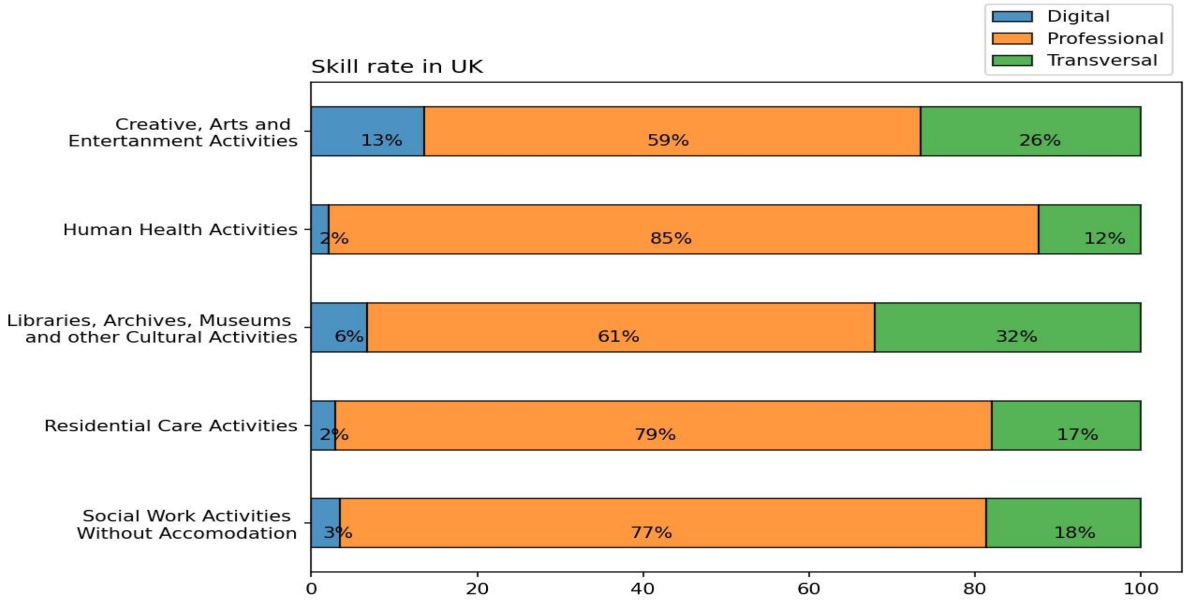
Annex 2. Skill Rates in partner Countries in Care and Arts and Culture Sectors

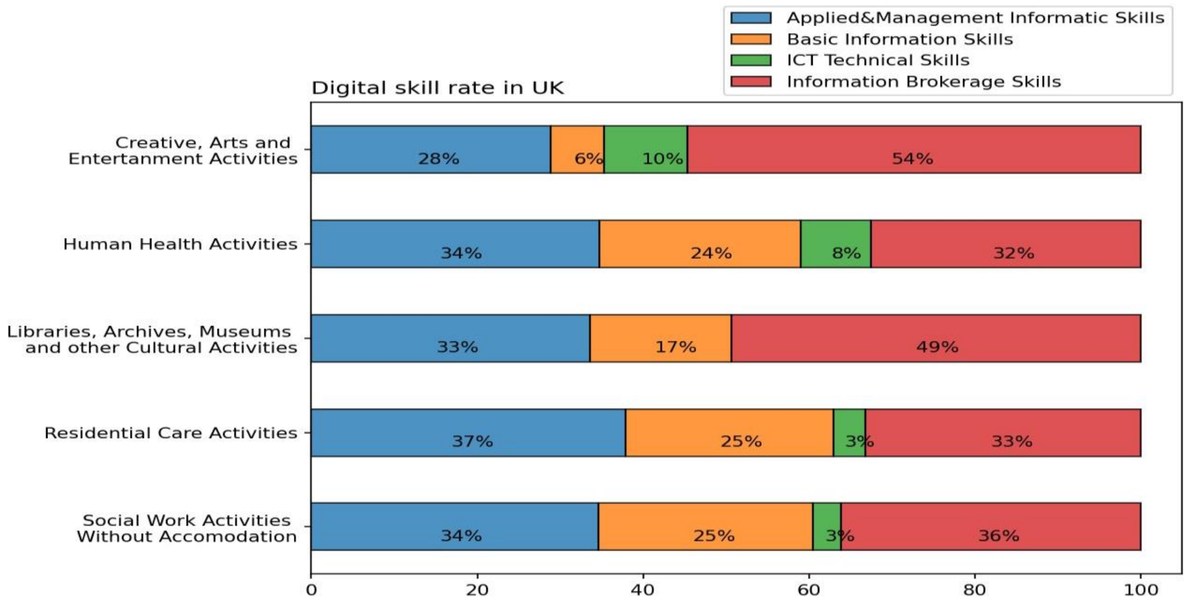
Findings for Spain



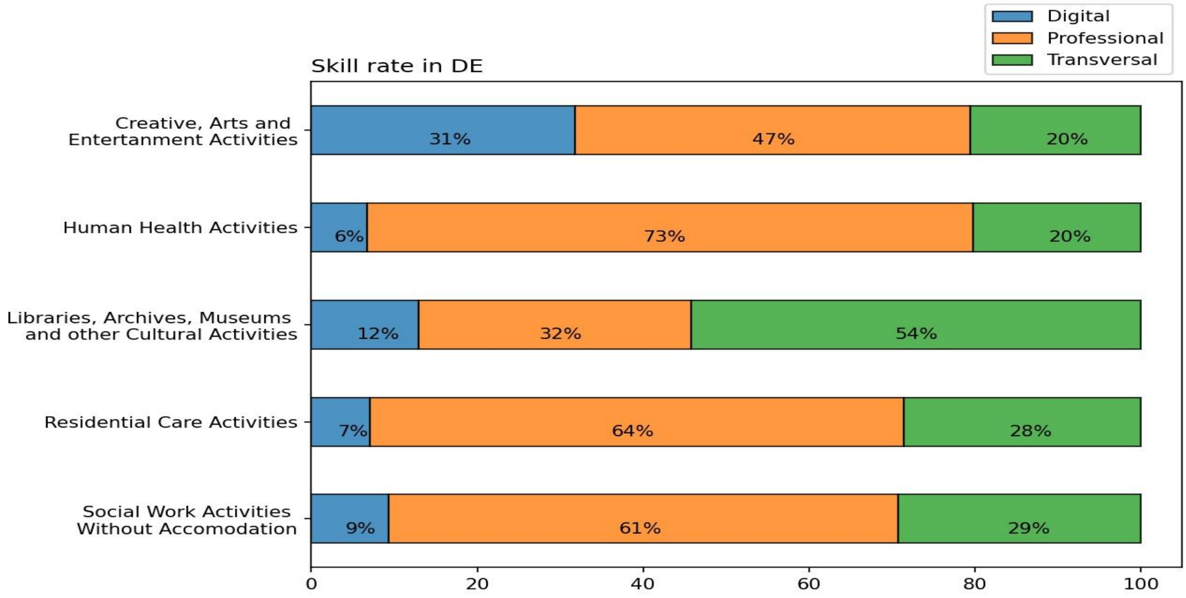


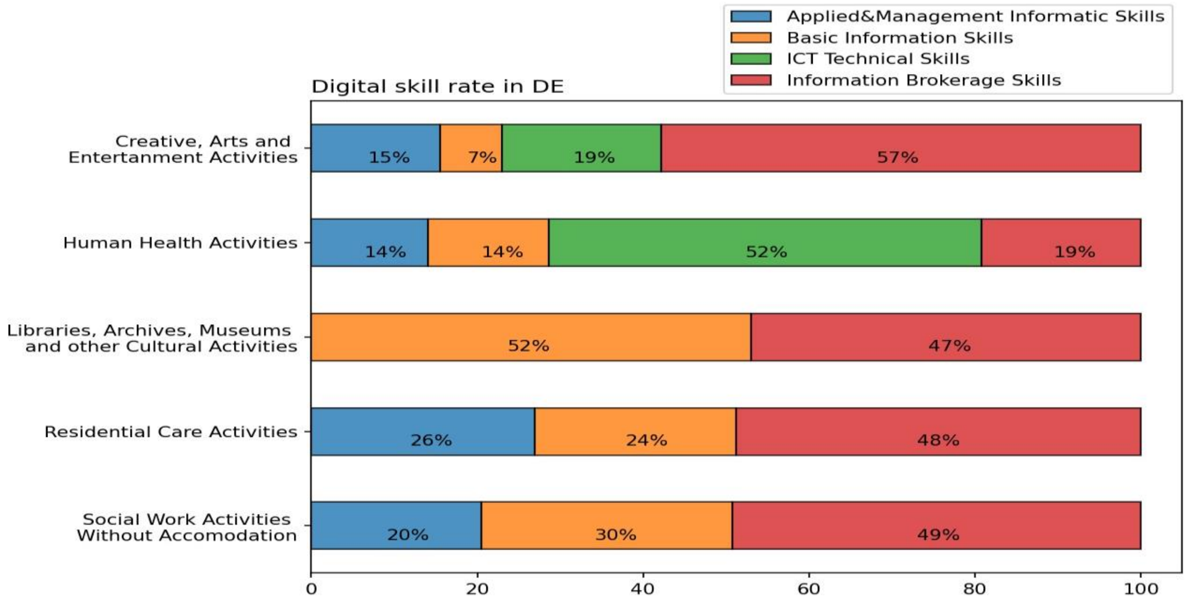
Findings for UK



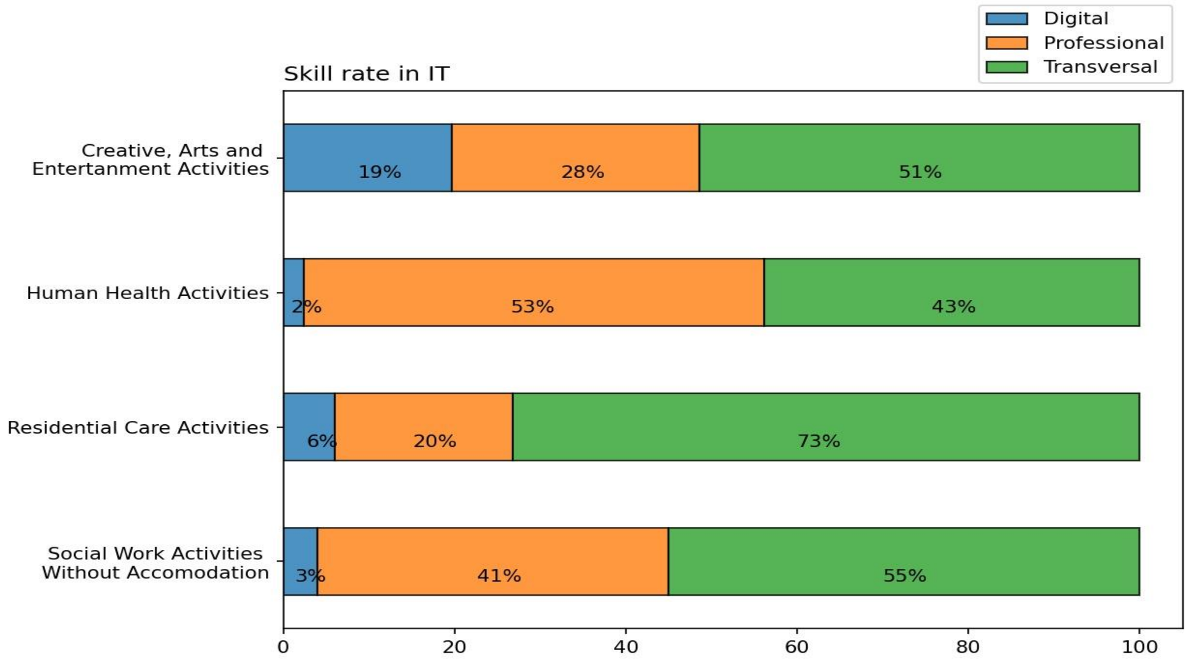


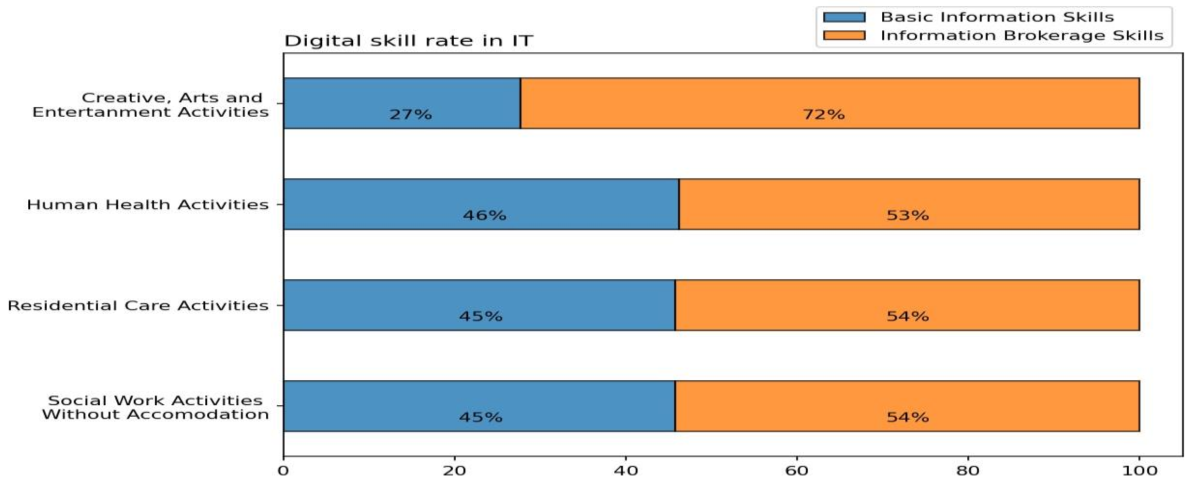
Findings for Germany



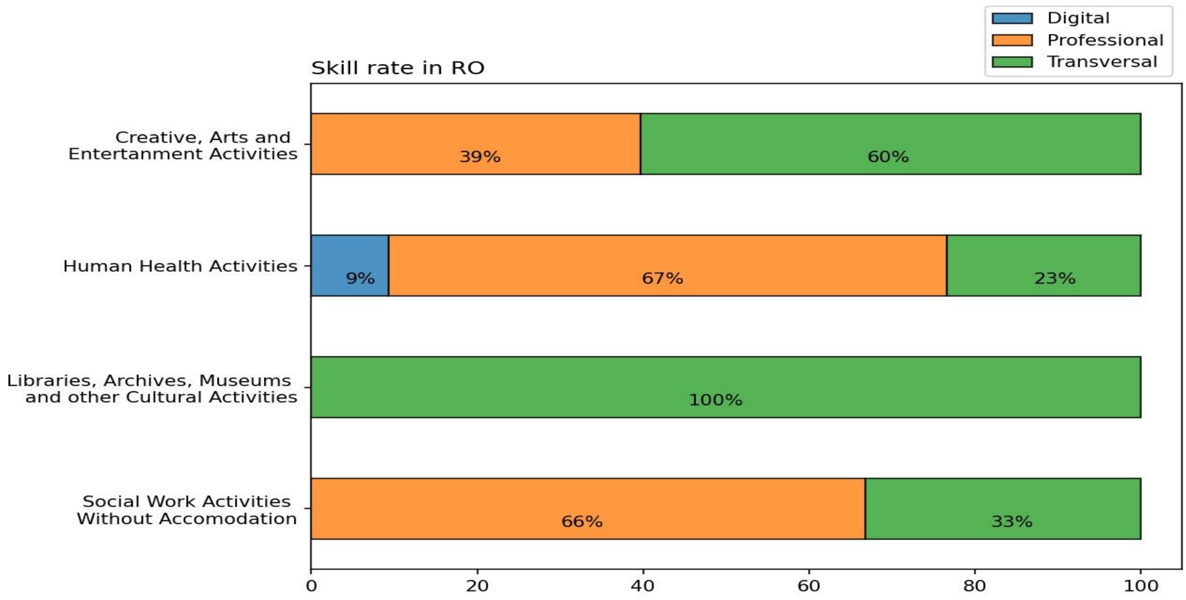


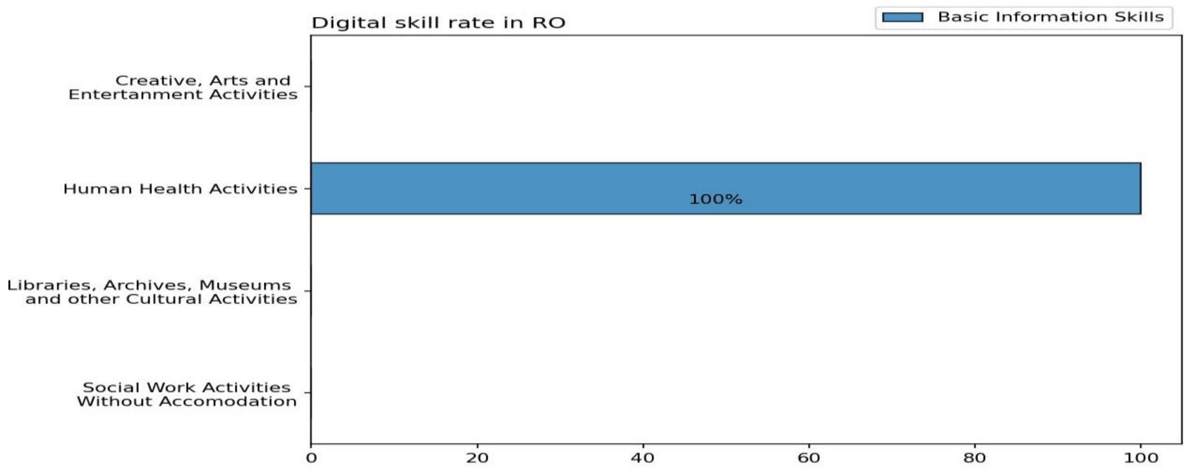
Findings from Italy





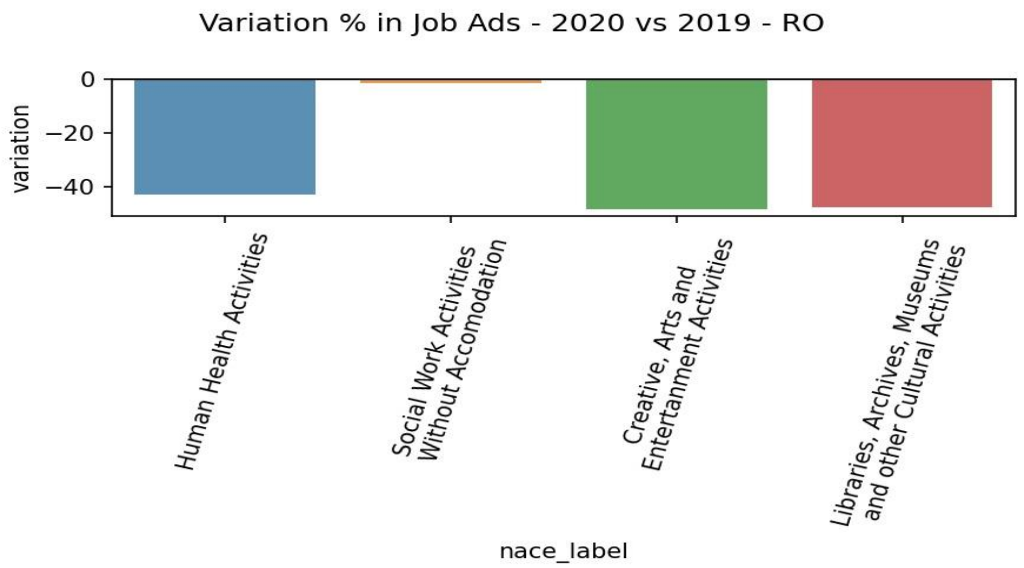
Findings from Romania

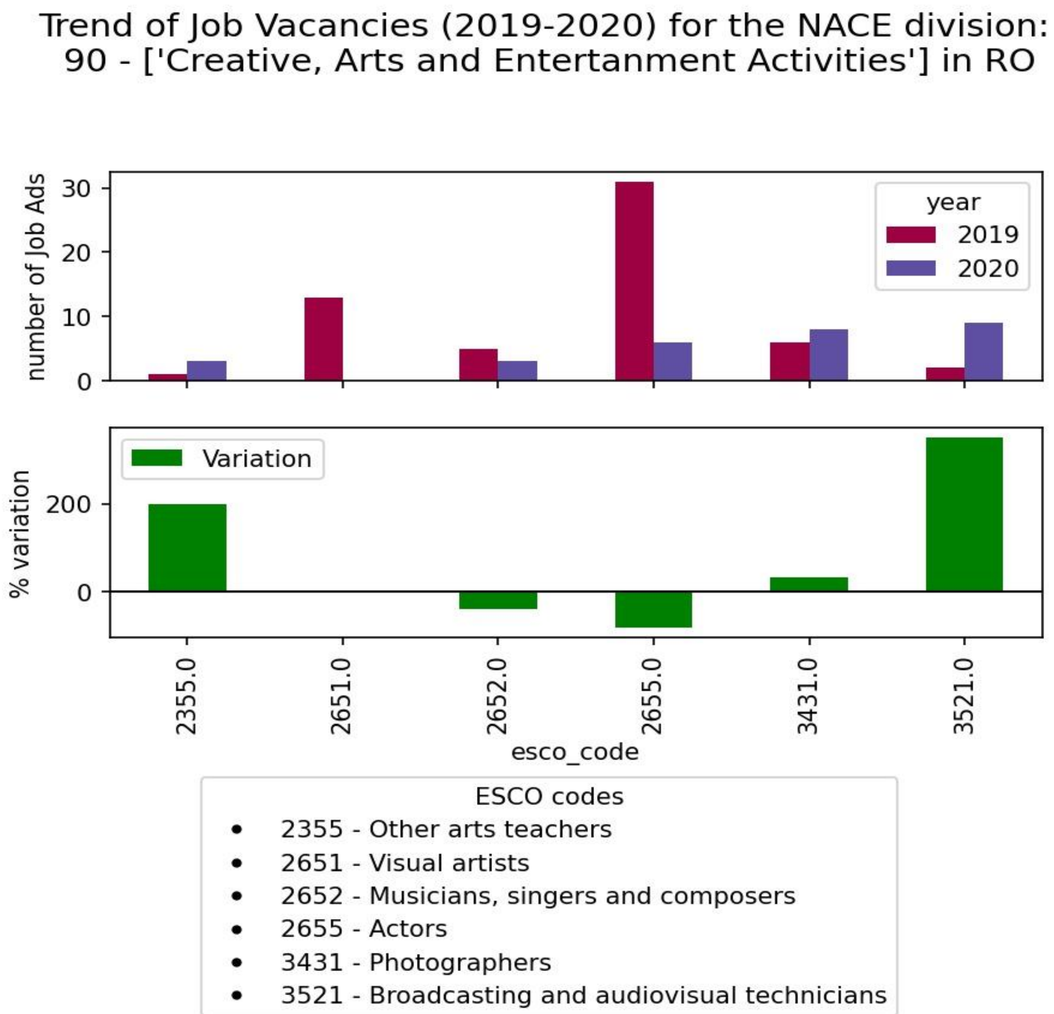


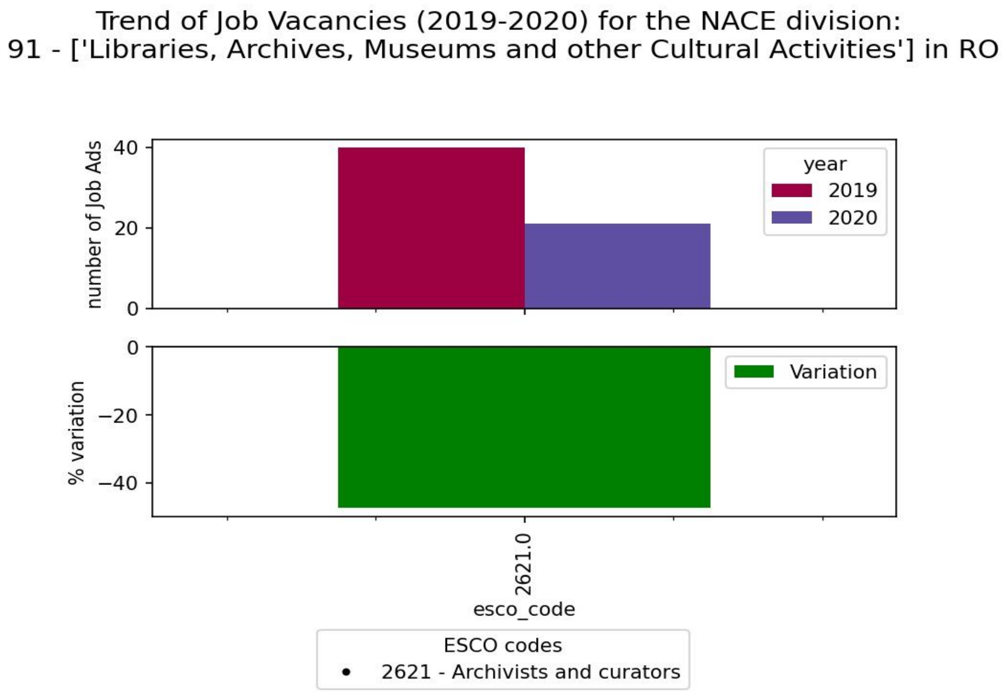


Annex 3. Trends in Job Adverts

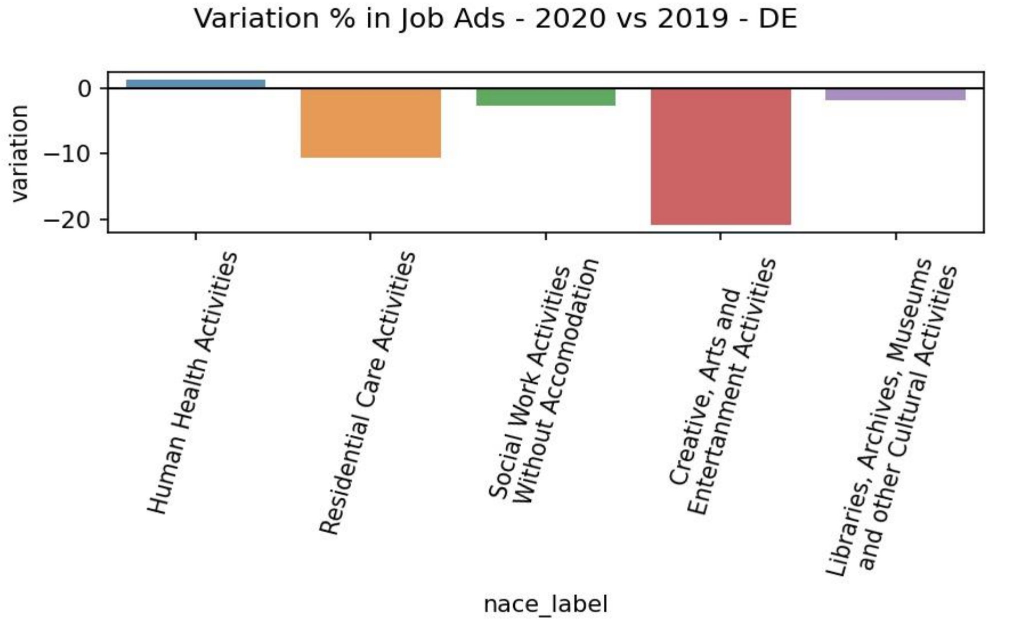
Findings from Romania

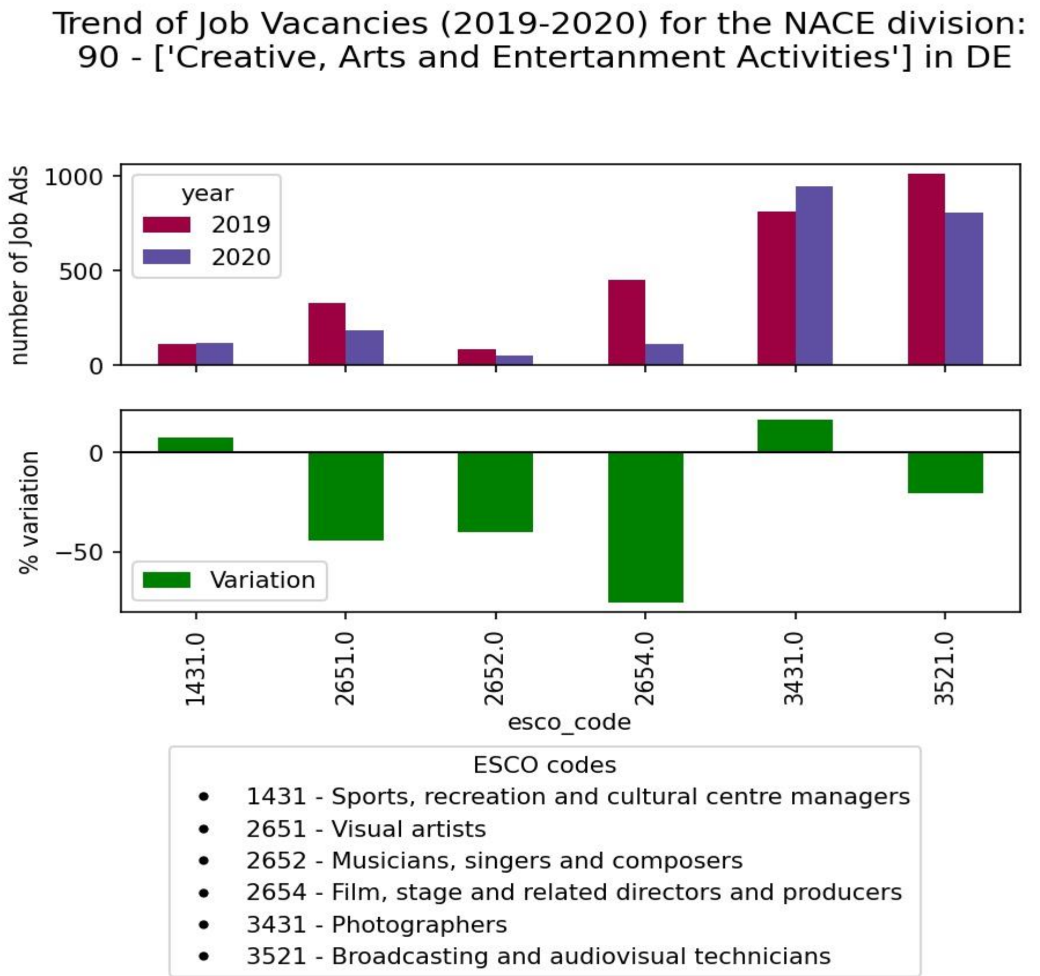


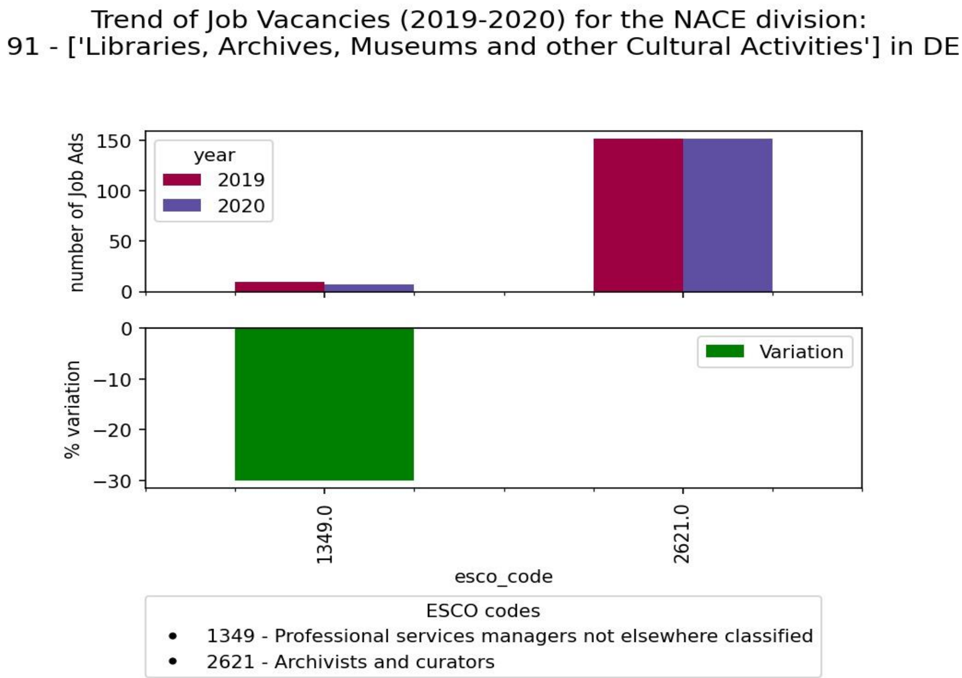



Trend of Job Vacancies (2019-2020) for the NACE division:
91 - ['Libraries, Archives, Museums and other Cultural Activities'] in RO
number of Job Ads
0
20
40
year
2019
2020
% variation
0
−20
−40
Variation
2621.0
esco_code
ESCO codes
2621 - Archivists and curators

Findings from Germany

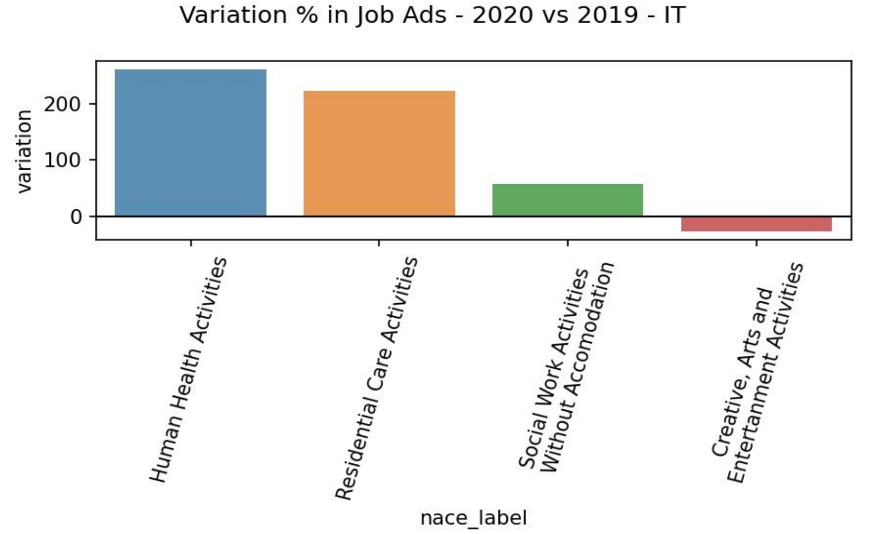


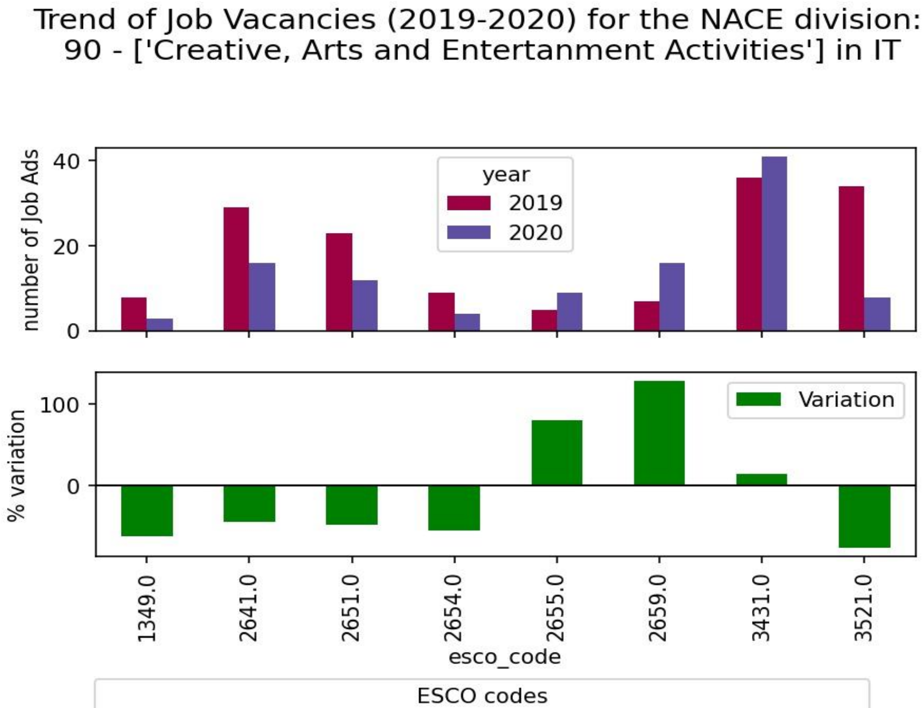




Trend of Job Vacancies (2019-2020) for the NACE division:
91 - ['Libraries, Archives, Museums and other Cultural Activities'] in DE
number of Job Ads
150
100
50
0
year
2019
2020
% variation
0
−10
−20
−30
Variation
1349.0
2621.0
esco_code
ESCO codes
1349 - Professional services managers not elsewhere classified
2621 - Archivists and curators

Findings from Italy

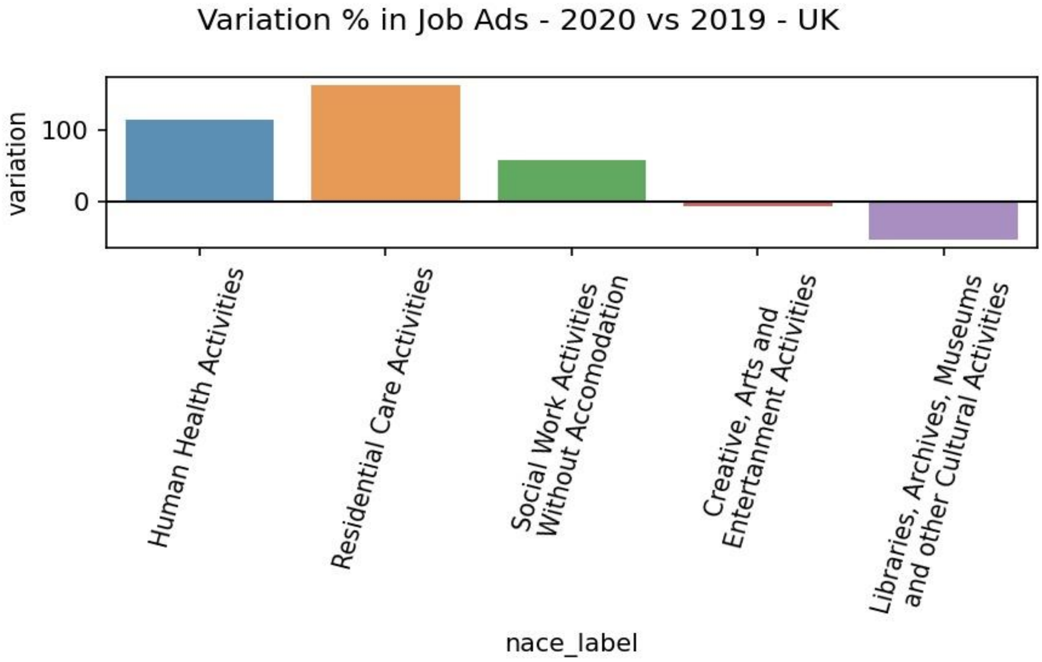


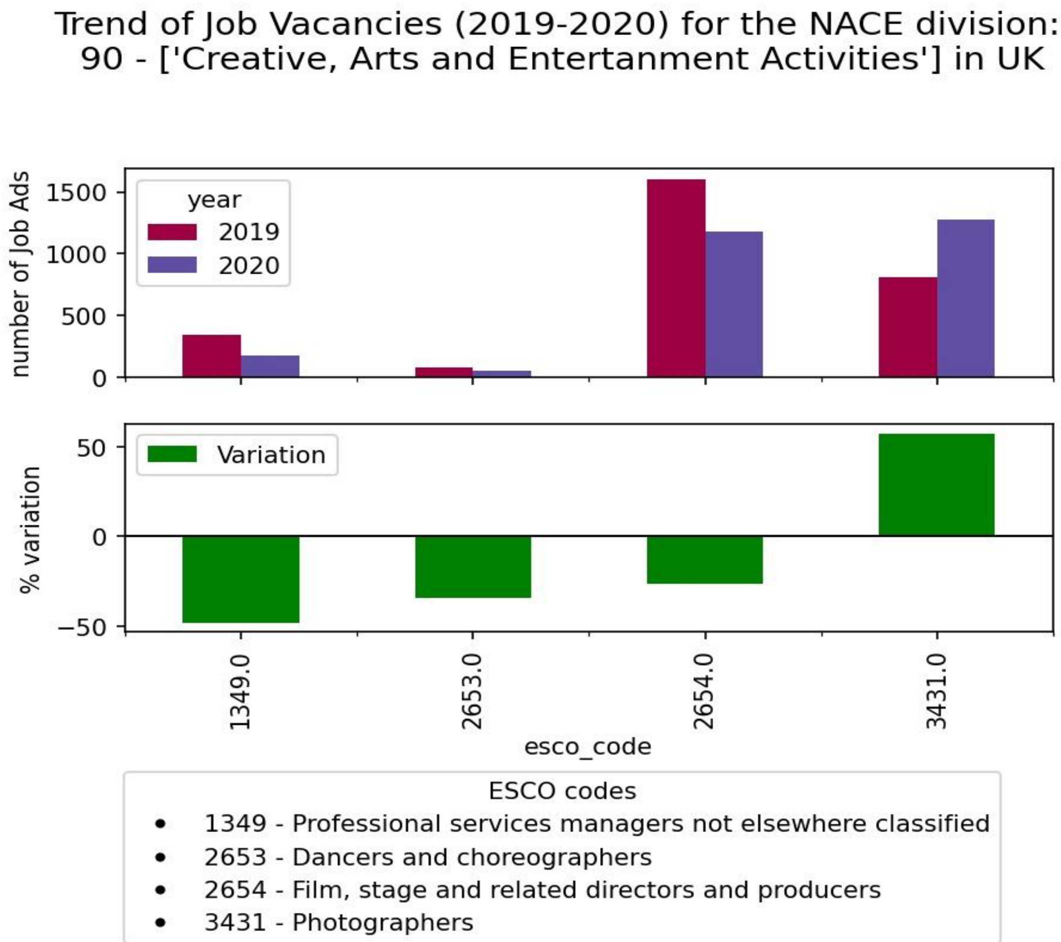


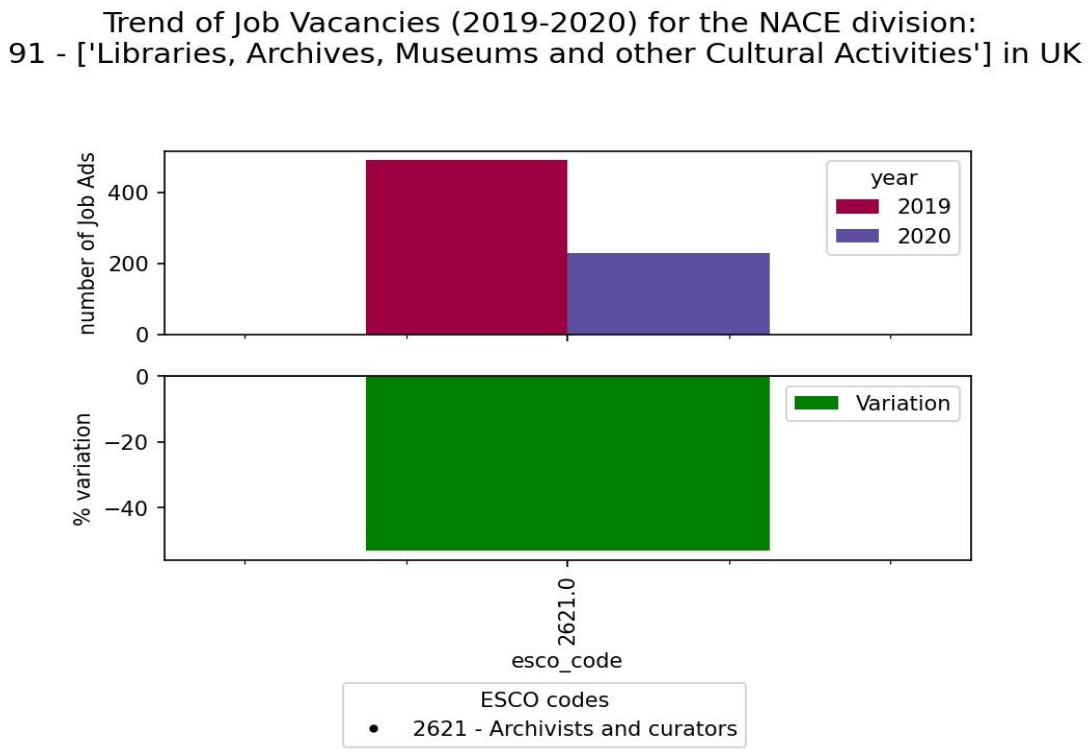
ESCO codes

- 1349 - Professional services managers not elsewhere classified
- 2641 - Authors and related writers
- 2651 - Visual artists
- 2654 - Film, stage and related directors and producers
- 2655 - Actors
- 2659 - Creative and performing artists not elsewhere classified
- 3431 - Photographers
- 3521 - Broadcasting and audiovisual technicians

Findings from the UK






Trend of Job Vacancies (2019-2020) for the NACE division:
91 - ['Libraries, Archives, Museums and other Cultural Activities'] in UK
number of Job Ads
400
200
0
year
2019
2020
% variation
0
−20
−40
Variation
2621.0
esco_code
ESCO codes
2621 - Archivists and curators

Findings from Spain