Mobile In Museums Study — 2012

A Survey of American Alliance of Museums (US) and Museums Association (UK) Members
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INTRODUCTION AND PROJECT GOALS
After the success of the first Mobile In Museums Study in 2011, Fusion Research + Analytics was pleased to partner once again with AAM on this 2012 survey. Our goal was to present a year-over-year view how museums use mobile technology to engage, educate and entertain their visitors, and then offer some guidance for future strategic development of short- and long-range mobile plans.

As US museums continue to embrace new mobile technologies, it’s important to keep in mind that American museums are part of a global museum community. The opportunity was ripe to work with colleagues around the world. We are therefore delighted to have expanded this year’s study to include the UK’s Museums Association, to provide a truly international view.

The resulting multi-country study goes even further to describe and explain how cultural organizations are using mobile technology to extend audience reach and provide potential new revenue channels.
Fusion Research + Analytics was commissioned by the American Alliance of Museums and the Museums Association to carry out this research. Fusion conducted the first survey of this kind in 2011 among AAM members.

Additional support for the analysis of these research findings, and especially to assess uses and attitudes towards mobile technology, was generously provided by Guide By Cell (www.guidebycell.com).
About AAM:
The American Alliance of Museums’ mission is to strengthen museums through leadership, advocacy, collaboration and service. The Alliance has been bringing museums together since 1906, helping to develop standards and best practices, gathering and sharing knowledge, and providing advocacy on issues of concern to the entire museum community.

About the MA:
The Museums Association is a membership organisation for everyone working in museums, galleries and heritage in the UK, with a mission to enhance the value of museums to society by sharing knowledge, developing skills, inspiring innovation, and providing leadership. The MA is the oldest museums association in the world, established in 1889 to guard the interests of museums and galleries.
METHODOLOGY
Survey Methodology

- The 2012 Mobile in Museums Study was fielded in January and February 2012 via an online survey.

- The survey was sent via e-mail to the entire population of AAM members.

- In total 1,037 surveys were collected from AAM members, representing 740 individual museums.

- The survey was conducted in the UK at the same time, yielding 471 responses (representing 386 individual museums) from Museums Association members, to create an international comparative study.
## Survey Respondent Profile

<table>
<thead>
<tr>
<th>Museum Role</th>
<th>Museum Type</th>
<th>Museum Traffic (On-site)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Curatorial 22%</td>
<td>• Art museum 35%</td>
<td>• Under 50,000 47%</td>
</tr>
<tr>
<td>• CEO/Director 22%</td>
<td>• History museum 22%</td>
<td>• 50,000 to 99,999 16%</td>
</tr>
<tr>
<td>• Education 20%</td>
<td>• General museum 12%</td>
<td>• 100,000 to 249,999 17%</td>
</tr>
<tr>
<td>• PR/Marketing 10%</td>
<td>• Historic house/site 9%</td>
<td>• 250,000 to 499,999 8%</td>
</tr>
<tr>
<td>• IT/Web 5%</td>
<td>• Specialized museum 7%</td>
<td>• 500,000+ 12%</td>
</tr>
<tr>
<td>• Interpretation 5%</td>
<td>• Science &amp; technology 5%</td>
<td></td>
</tr>
<tr>
<td>• Development 4%</td>
<td>• Natural history 5%</td>
<td></td>
</tr>
<tr>
<td>• Board Member 4%</td>
<td>• Children’s museum 3%</td>
<td></td>
</tr>
<tr>
<td>• Visitor services 2%</td>
<td>• Other 3%</td>
<td></td>
</tr>
<tr>
<td>• COO 2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Membership 1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• CFO 1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Research 1%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
EXECUTIVE SUMMARY
Executive Summary

- Nearly half (44%) of the US adult (18+) population owns a smartphone.*
- Internationally, smartphone growth rates from 2011-to-2012 grew fastest in the UK (70%) followed by the US (42%) and France (41%).
- A large majority of US and UK smartphone owners use their phones for non-talk activities including: taking pictures or video, browsing the Internet and looking up directions/maps.
- Americans have an average of 29 apps on their smartphones; about one-third of these apps were purchased.
- Not surprisingly, younger adults (18-29: 58%) are most likely to own a smartphone.

*Source: Our Mobile Planet (http://www.thinkwithgoogle.com/mobileplanet/en/).
Overall, AAM member museums are enthusiastic about mobile technology and how it can increase engagement among visitors and introduce their institutions/collections to a wider audience on- and off-site.

More than half of US museums offer mobile platforms
- 8% of museums offer only traditional museum-provided mobile devices.
- 13% of museums offer both traditional museum-provided mobile devices and new mobile features (e.g., QR Codes).
- 36% of museums offer only new mobile features (i.e., “bring your own device”).

New mobile features have the promise to make the benefits of mobile available to any museum, regardless of size.
The most popular new mobile features offered by AAM member museums require visitors to use their own mobile devices.

- Overall, QR Codes (30%) are the most popular US museum mobile feature, followed by mobile phone guided tours (17%) and the traditional museum-provided audio tour (16%).

Although visitor engagement is the primary goal of most mobile programs, marketing and visitor demand are important secondary goals.

- Importantly, museums that have employed newer mobile technology features are more likely to want to take advantage of the full potential benefits of mobile.

Despite the growth of mobile technology in museums, about four in ten museums do not offer any mobile features, citing the lack of dedicated budgets, limited resources and limited knowledge as key reasons.
Knowledge about mobile technology is a key factor in increasing mobile technology adoption across the sector.

“Increasing knowledge of mobile technologies and the benefits of using such media among museum managers is key to adoption” – AAM Member survey respondent

Despite the many barriers facing mobile technology adoption, the future of mobile in museums is bright.

One third of non-mobile museums planned to introduce a mobile feature in 2012.

Half of mobile museums planned a new mobile launch and two thirds planned to expand existing mobile features in 2012.

The trend of visitors using their own mobile devices is expected to explode in 2012 and beyond.

Although less than half of AAM members believe that the use of museum-provided devices will grow in the next 12 months, the vast majority see the usage of visitors’ mobile devices increasing in 2012.
2012: GLOBAL TRENDS IN MOBILE ADOPTION
Global Adoption Trends

Smartphone Penetration

UK: 51% (70% growth)
USA: 44% (42% growth)
Spain: 44% (33% growth)
France: 38% (41% growth)
Italy: 28% (17% growth)

Source: Our Mobile Planet (May 2012) research was commissioned by Google and conducted by Ipsos MediaCT in partnership with the Mobile Marketing Association and the Interactive Advertising Bureau (http://www.thinkwithgoogle.com/mobileplanet/en/).
## Global Adoption Trends

### Smartphone Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>USA</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Took a photo or video</td>
<td>77%</td>
<td>78%</td>
</tr>
<tr>
<td>Browsed the Internet</td>
<td>73%</td>
<td>76%</td>
</tr>
<tr>
<td>Looked up directions/used a map</td>
<td>69%</td>
<td>62%</td>
</tr>
<tr>
<td>Downloaded mobile content</td>
<td>55%</td>
<td></td>
</tr>
<tr>
<td>Watched videos on video sharing site</td>
<td>54%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Source: Our Mobile Planet
Global Adoption Trends

**Smartphone Apps**

- Currently on smartphone: 29
- Used in last 30 days: 12
- Purchased in app store: 9

*About one-third of all apps are purchased*

Source: Our Mobile Planet
Global Adoption Trends

Smartphone Ownership Demographics

Source: Our Mobile Planet
2012: MOBILE TECHNOLOGY IN MUSEUMS
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: Estimates based on individual museum responses.
Museums of All Sizes Have Mobile-Only Applications

- A majority of museums with more than 50K on-site visitors are using new mobile only technology.

**Visitor Traffic by Type of Mobile Museum**

- **500,000+**: 12% Museum-provided only, 31% Museum-provided & new mobile, 47% New mobile only
- **250,000 to 499,999**: 11% Museum-provided only, 30% Museum-provided & new mobile, 34% New mobile only
- **100,000 to 249,999**: 12% Museum-provided only, 17% Museum-provided & new mobile, 46% New mobile only
- **50,000 to 99,999**: 14% Museum-provided only, 10% Museum-provided & new mobile, 47% New mobile only
- **Under 50,000**: 6% Museum-provided only, 27% New mobile only

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: Estimates based on individual museum responses.
Museums of All Types Offer Mobile Technologies

- Although art museums have traditionally been at the forefront of mobile offerings, natural history and science/technology museums/centers, among others, are also using new mobile technology to engage visitors.

**Mobile Segments and Museum Types**

<table>
<thead>
<tr>
<th>Museum Type</th>
<th>Museum-provided only</th>
<th>Museum-provided &amp; new mobile</th>
<th>New mobile only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Art museum</td>
<td>13%</td>
<td>22%</td>
<td>35%</td>
</tr>
<tr>
<td>Historic house/Historic site</td>
<td>12%</td>
<td>8%</td>
<td>35%</td>
</tr>
<tr>
<td>Specialized museum</td>
<td>13%</td>
<td>4%</td>
<td>28%</td>
</tr>
<tr>
<td>Natural history/Anthropology museum</td>
<td>9%</td>
<td>9%</td>
<td>51%</td>
</tr>
<tr>
<td>Science and/or technology museum</td>
<td>6%</td>
<td>15%</td>
<td>48%</td>
</tr>
<tr>
<td>History museum/Historical society</td>
<td>6%</td>
<td>0%</td>
<td>30%</td>
</tr>
<tr>
<td>Children's or youth museum</td>
<td></td>
<td></td>
<td>44%</td>
</tr>
</tbody>
</table>

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: Estimates based on individual museum responses.
Museums in the US and UK Have Similar Levels of Mobile Adoption

- Although US and UK museums have similar levels of museum-provided devices, the US is ahead in the number of museums providing “new mobile features only”
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.)

**QR Codes Top the US Museum Mobile List**

- QR Codes are the most popular museum mobile feature in the US, followed by mobile phone guided tours and the traditional museum-provided audio tour.

<table>
<thead>
<tr>
<th>Mobile Offerings</th>
<th>Museum-provided</th>
<th>New mobile</th>
</tr>
</thead>
<tbody>
<tr>
<td>QR Codes</td>
<td>6%</td>
<td>30%</td>
</tr>
<tr>
<td>Mobile phone guided audio tours</td>
<td>16%</td>
<td>17%</td>
</tr>
<tr>
<td>Museum-provided device, audio-only tour</td>
<td>13%</td>
<td>16%</td>
</tr>
<tr>
<td>Smartphone app</td>
<td>6%</td>
<td>13%</td>
</tr>
<tr>
<td>Museum-provided device, multimedia tour</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Mobile Web</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Mobile activity/game applications</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>iPad tour</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Mobile Giving</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Text Message reminders/alerts</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Mobile surveys/polling</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Sharing web links-multimedia via text</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Mobile phone wayfinding/GPS</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Augmented reality</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
US Museums Are More Likely to Offer QR Codes and Mobile Phone Audio Tours than UK Museums

- UK Museums are slightly more likely to offer museum-provided audio-only devices and Mobile Giving.

**2012 UK and US Museums Mobile Offerings**

- QR Codes
- Mobile phone guided audio tours
- Museum-provided device, audio-only tour
- Smartphone app
- Museum-provided device, multimedia tour
- Mobile Web/WAP/MOBI
- Mobile activity/game applications
- iPad tour
- Mobile Giving
- Text Message reminders/alerts
- Mobile surveys/polling
- Sharing web links/multimedia via text
- Mobile phone wayfinding/GPS
- Augmented reality

[Bar chart showing the comparison between UK and US museum mobile offerings.]

FUSION
RESEARCH + ANALYTICS
More than half of US Museums Are Already Mobile

Driven by the adoption of new mobile features, the number of US museums that provide mobile services increased by more than one third from 2011 to 2012.

2011 vs 2012: Growth in Mobile Museums in the US

2011: 42%
2012: 57%

36%
2011 to 2012: Which Mobile Features Grew the Most?

- QR Codes, iPad tours and smartphone apps grew the fastest in the US in 2012.
- Traditional audio guides declined by one-fifth in 2012.

<table>
<thead>
<tr>
<th>Mobile Feature</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>QR Codes</td>
<td>800%</td>
</tr>
<tr>
<td>iPad tour</td>
<td>200%</td>
</tr>
<tr>
<td>Smartphone app</td>
<td>151%</td>
</tr>
<tr>
<td>Mobile Web</td>
<td>146%</td>
</tr>
<tr>
<td>Museum-provided multimedia tour</td>
<td>50%</td>
</tr>
<tr>
<td>Cell phone guided audio tours</td>
<td>0%</td>
</tr>
<tr>
<td>Text message reminders/alerts</td>
<td>0%</td>
</tr>
<tr>
<td>Mobile activity/game applications</td>
<td>0%</td>
</tr>
<tr>
<td>Mobile Giving</td>
<td>0%</td>
</tr>
<tr>
<td>Museum-provided audio tour</td>
<td>-21%</td>
</tr>
</tbody>
</table>

* Percent of museums that offer mobile features in 2012.
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: Estimates based on individual museum responses.

QR Codes Are Most Common At Mid-Sized Museums

<table>
<thead>
<tr>
<th>Size by Mobile Feature</th>
<th>Smartphone app (%)</th>
<th>QR Codes (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>500,000+</td>
<td>36</td>
<td>49</td>
</tr>
<tr>
<td>250,000 to 499,999</td>
<td>19</td>
<td>38</td>
</tr>
<tr>
<td>100,000 to 249,999</td>
<td>17</td>
<td>41</td>
</tr>
<tr>
<td>50,000 to 99,999</td>
<td>13</td>
<td>42</td>
</tr>
<tr>
<td>Under 50,000</td>
<td>5</td>
<td>19</td>
</tr>
</tbody>
</table>
Visitors are coming to museums equipped with their own mobile devices:

- “In a recent study we found that 74% of our visitors brought a mobile device with them. Fifty nine percent of [these visitors] had iPhones, followed...by Android (25%).” Stephanie Pau – MoMA, NY

However, few are using their personal devices to access museum content:

- “QR Codes are as close to a standard as there is [for museums] and they are device agnostic. But uptake of QR Codes is still very low. [So] the jury remains out on [how effective] QR Codes are.” Hugh Wallace – National Museums of Scotland
- “We have used QR Codes for temporary exhibits and plan to use QR Codes for a ‘London Games Trail’ this summer. Usage in the past has been low – so it will be interesting to see if visitor usage increases this summer.” Matthew Cock – British Museum
Marketing and visitor demand are important secondary goals for mobile technology in museums – but generating revenue is considered much less important.
Museums that Understand the Potential of Mobile are More Likely to Offer New Mobile Features

<table>
<thead>
<tr>
<th>Mobile Goals</th>
<th>Traditional museum-provided guide only</th>
<th>Both museum-provided guide and new mobile features</th>
<th>New mobile features only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase visitor engagement</td>
<td>90%</td>
<td>94%</td>
<td>83%</td>
</tr>
<tr>
<td>Meet visitor demand for mobile technology</td>
<td>25%</td>
<td>59%</td>
<td>49%</td>
</tr>
<tr>
<td>Bring our collections to a wider audience than visitors</td>
<td>27%</td>
<td>56%</td>
<td>46%</td>
</tr>
<tr>
<td>Engage visitors in creative activities</td>
<td>22%</td>
<td>53%</td>
<td>46%</td>
</tr>
<tr>
<td>Marketing/word of mouth about the museum</td>
<td>24%</td>
<td>40%</td>
<td>54%</td>
</tr>
<tr>
<td>Keeping up with museum peers</td>
<td>23%</td>
<td>34%</td>
<td>27%</td>
</tr>
<tr>
<td>Visitor giving/donation</td>
<td>6%</td>
<td>13%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Q. What are the goals of your mobile programs? (Select all that apply)
A Majority of Museums Manage their Mobile Programs In-house

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

Q. What percentage of your mobile program resources are managed in-house?
Annual Mobile Program Budgets Are Small - So Museums Embrace a “DIY” Approach

- Most UK and US museums have limited mobile budgets, motivating them to adopt a do-it-yourself approach

**Mobile Program Annual Budgets**

United Kingdom (£)

- 4% More than 50K
- 13% 11K to 49K
- 83% Less than 10K

United States ($)

- 9% More than 50K
- 12% 11K to 49K
- 79% Less than 10K

Q. What is your approximate mobile program annual budget?
Q. Ultimately, what would you want your visitors to do/get out of mobile program(s)/future mobile program(s)? (Select all that apply.)

Museums Want Mobile Technology to Help Their Visitors Learn, Engage and Be Aware of Upcoming Events

**Mobile Program Outcomes**

- Greater sense of engagement with the museum (94%)
- Increased learning (88%)
- Information of upcoming events and exhibits (65%)
- Seeing more of the venue/objects on display (57%)
- Family interaction (50%)
- Improved wayfinding (43%)
- Group interaction (38%)
Families are an important mobile audience target; students are more important than teachers.

**Mobile Program Audience Targets**

- Adults aged 25-54: 80%
- Young adults: under 25: 77%
- Students: High School: 67%
- Families: 65%
- Teachers: 58%
Important Components for Developing a Mobile Strategy

Important components cited by AAM members for developing a mobile strategy include: establishing a vision, obtaining organizational buy-in and understanding the mobile development process.

Vision:

- “Most important thing is leadership and an internal champion.”
- “Developing a shared vision for goals for a mobile technology plan and realistic expectations.”
- “Cart before the horse: Some staff are very eager to employ technology without developing institutional, creative and interpretive goals or creating content.”
- “Because my organization is an historical landmark (and quite old), I feel that we need so much support to convince ‘the powers that be’ why we need it versus asking why shouldn't we have it?”
Important Components for Developing a Mobile Strategy (cont.)

■ **Buy-in:**
  - “The most important factor in whether or not a museum can implement a successful mobile campaign is the degree of support from the top level of the institution.”
  - “Buy-in from all staff on the importance and possibilities of our mobile offerings, resulting in engagement and participation from all levels of staff.”

■ **Understanding the mobile process:**
  - “Convincing staff that mobile is not 1) just another burden/task, 2) a trendy fad, 3) technically too difficult to learn.”
  - “Differences in development philosophies – rapid, iterative releases work for mobile technology, but don't fit with our exhibition development process and standards.”
  - “Educating staff – our Director is a self-proclaimed Luddite.”
NON-MOBILE MUSEUMS
Barriers to Becoming Mobile

- Budget
- Resources
- Knowledge
- Expensive
- No-standards
- Do-not-use-in-museum
- No-training
- No-time
- Too-trendy
- Not-a-priority

Fusion Research + Analytics
Lack of Dedicated Budget and Limited Resources Restrain Mobile Growth in Both the US and UK

<table>
<thead>
<tr>
<th>Reason</th>
<th>Non-Mobile Museums</th>
</tr>
</thead>
<tbody>
<tr>
<td>No dedicated budget for mobile</td>
<td>60%</td>
</tr>
<tr>
<td>Too many other demands on internal resources</td>
<td>50%</td>
</tr>
<tr>
<td>Insufficient staff time</td>
<td>40%</td>
</tr>
<tr>
<td>Too expensive</td>
<td>30%</td>
</tr>
<tr>
<td>Lack of visitor demand</td>
<td>20%</td>
</tr>
<tr>
<td>Insufficient staff training</td>
<td>10%</td>
</tr>
<tr>
<td>Mobile is not an institution priority</td>
<td>50%</td>
</tr>
<tr>
<td>Insufficient knowledge of mobile products</td>
<td>40%</td>
</tr>
<tr>
<td>Insufficient knowledge of the revenue models</td>
<td>30%</td>
</tr>
<tr>
<td>Not sure how to evaluate the effectiveness</td>
<td>20%</td>
</tr>
<tr>
<td>No field-wide standards for mobile technology</td>
<td>10%</td>
</tr>
<tr>
<td>Don’t want visitors using mobile devices on-site</td>
<td>50%</td>
</tr>
<tr>
<td>Mobile technology is better suited for..</td>
<td>40%</td>
</tr>
<tr>
<td>Mobile technology is too trendy</td>
<td>30%</td>
</tr>
</tbody>
</table>

Q. What are the primary reason(s) why your organization does not offer or use mobile technologies? (Select all that apply.)
Few museums see fees or advertising as effective tactics for supporting mobile programs.

Initiatives To Support Mobile Programs: Mobile Museums Only (% Very/Somewhat Likely)

- Partner with local agencies (e.g. tourism office): 51%
- Partner with other cultural organizations: 50%
- Offer sponsorship opportunities: 36%
- Partner with third party mobile provider: 30%
- Accept advertising: 15%
- Charge visitors a fee to access mobile services: 10%
A Lack of Knowledge of Mobile Platforms Also Limits Mobile Adoption in the US

- Staff at Non-Mobile Museums possess less knowledge about mobile technology

**Percent Knowledge of Key Mobile Platforms**

- QR Codes: Mobile 55%, Non-Mobile 26%
- Smartphone app: Mobile 51%, Non-Mobile 36%
- iPad tour: Mobile 31%, Non-Mobile 20%
- Mobile giving: Mobile 21%, Non-Mobile 17%
- Augmented reality: Mobile 15%, Non-Mobile 8%

Q. What is your personal knowledge of the following mobile platforms, features and revenue models?
KEY MOBILE CHALLENGES
Mobile Challenges in 2012
Funding and Resources are Challenges for Everyone — Mobile and Non-Mobile Museums Alike

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

- Many of the mobile challenges cited by AAM members involved management issues:
  - “Difference of opinion and internal functional areas and how to support new technologies.”
  - “Finding appropriate uses of the technology that are more than just a fad – determining what ‘needs’ to be mobile.”
  - “Hierarchical management structure.”
  - “Increasing knowledge of mobile technologies and the benefits of using such media amongst museum managers is key to adoption.”
  - “IT systems and attitudes of colleagues in central IT who don’t understand our visitors needs.”
  - “Older generations of staff do not see/understand platforms and potential benefits.”
Respondents Agree that Mobile Technology in Museums is Here to Stay...But Don’t Always Concur on its Significance

Views on Mobile Technology in Museums
(% Very/Somewhat Agree)

- Mobile platforms are essential to visitor engagement strategy: 57% (Mobile), 28% (Non-Mobile)
- Our visitors expect access to mobile services: 56% (Mobile), 24% (Non-Mobile)
- Our venue has structural barriers that constrain mobile technologies: 46% (Mobile), 39% (Non-Mobile)
- Our organization sees the need but lacks the knowledge to implement: 53% (Mobile), 45% (Non-Mobile)
- Mobile technology programs are nice to have but are not essential: 45% (Mobile), 30% (Non-Mobile)
- Mobile technologies exclude too many visitors: 35% (Mobile), 27% (Non-Mobile)
- Mobile technology is a fad: 5% (Mobile), 4% (Non-Mobile)
- Are more for commercial firms: 7% (Mobile), 4% (Non-Mobile)

Q. Do you agree or disagree with the following statements?
Despite the strong growth in the number of consumers and museums using mobile technology, little has changed in the sector’s strategic development efforts.
THE MOBILE FUTURE: 2012 AND BEYOND
The Future of Mobile for Museums is Bright

- US non-mobile museums plan to introduce new mobile features at a slightly faster pace than their UK peers – about one-third planned to introduce a new mobile platform in 2012.
- Half of all mobile museums planned a new mobile launch and two-thirds planned to expand existing mobile features in 2012.
Smartphone Apps, iPad Tours and QR Codes Topped the List of New Mobile Technologies for 2012

New Mobile Feature Introductions

- Smartphone app: 24% (Mobile), 14% (Non-Mobile)
- iPad tour: 15% (Mobile), 6% (Non-Mobile)
- QR Codes: 19% (Mobile), 13% (Non-Mobile)
- Cell phone guided audio tours: 15% (Mobile), 12% (Non-Mobile)
- Mobile Giving: 12% (Mobile), 7% (Non-Mobile)
- Wayfinding/GPS: 11% (Mobile), 8% (Non-Mobile)
- Mobile Web: 11% (Mobile), 7% (Non-Mobile)
- Mobile activity/game applications: 11% (Mobile), 5% (Non-Mobile)
- Mobile surveys/polling: 11% (Mobile), 5% (Non-Mobile)
- Museum-provided multimedia tour: 10% (Mobile), 5% (Non-Mobile)
- Text Message reminders/alerts: 8% (Mobile), 4% (Non-Mobile)
- Sharing web links or multimedia via text: 7% (Mobile), 4% (Non-Mobile)
- Augmented reality: 6% (Mobile), 1% (Non-Mobile)
- Museum-provided device audio only tour: 5% (Mobile), 8% (Non-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?
QR Codes and Smartphone Apps Topped the Expansion List for Current Mobile Museums

**2012 Feature Expansions**
(Among Mobile Museums Only)

<table>
<thead>
<tr>
<th>Feature</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>QR Codes</td>
<td>39%</td>
</tr>
<tr>
<td>Smartphone app</td>
<td>21%</td>
</tr>
<tr>
<td>Cell phone guided audio tours</td>
<td>19%</td>
</tr>
<tr>
<td>Mobile Web/WAP/MOBI</td>
<td>14%</td>
</tr>
<tr>
<td>Museum provided device multimedia tour</td>
<td>14%</td>
</tr>
<tr>
<td>Museum provided device audio only tour</td>
<td>11%</td>
</tr>
<tr>
<td>Mobile surveys/polling</td>
<td>11%</td>
</tr>
<tr>
<td>iPad tour</td>
<td>10%</td>
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<td>Wayfinding/GPS</td>
<td>8%</td>
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<tr>
<td>Sharing web links or multimedia via text message</td>
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</tr>
<tr>
<td>Mobile Giving</td>
<td>6%</td>
</tr>
<tr>
<td>Text Message reminders</td>
<td>6%</td>
</tr>
<tr>
<td>Augmented reality</td>
<td>4%</td>
</tr>
</tbody>
</table>

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?
AAM Members Expect Visitors to Use Museum-Provided Devices More in the Year Ahead

About one third of non-mobile and nearly half of mobile museums believe usage of museum provided devices will grow in the next 12 months.

Visitor Usage of Museum Provided Devices In Next 12 months

- Increase: 45% (non-mobile), 30% (mobile)
- Stay the same: 27% (non-mobile), 27% (mobile)
- Decrease: 5% (non-mobile), 9% (mobile)
- Don't know/Not sure: 32% (non-mobile), 19% (mobile)

Q. Do you think visitor demand over the next 12 months, for museum provided mobile devices, will...
But ... They Expect Visitors to Use Their Own Devices Even More!

- A large majority of both non-mobile and mobile museums see usage of visitors’ personal devices increasing in the next 12 months.

Visitor Usage of Personal Devices to Access Content In Next 12 months

<table>
<thead>
<tr>
<th></th>
<th>Non-Mobile</th>
<th>Mobile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase</td>
<td>61%</td>
<td>77%</td>
</tr>
<tr>
<td>Stay the same</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Decrease</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Don't know/Not sure</td>
<td>22%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Q. Do you think visitor demand over the next 12 months, to access museum content on their own mobile devices (smartphones, tablets, etc.) will...
MOBILE FORECAST
Overall, Fusion forecasts that today’s Mobile museums in the US and UK will also take the lead in introducing new mobile platforms.

2012 Mobile Platform Introduction Forecast*

- Non-Mobile museums:
  - 18% (UK)
  - 25% (US)

- Mobile museums:
  - 33% (UK)
  - 35% (US)
Your Guide to Using the News in this Report

<table>
<thead>
<tr>
<th>Develop (or refine) a mobile strategy that makes sense for visitors</th>
<th>• A majority of museums do not have a mobile strategy. Forward thinking museums must integrate mobile into their visitor engagement strategy to keep pace with visitor expectations.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anticipate and measure the impact of museum mobile initiatives</td>
<td>• To build your mobile business case, you need to measure the overall impact of your mobile initiatives.</td>
</tr>
<tr>
<td>Define a mobile road map for the next 12 to 18 months</td>
<td>• Your visitors/users and peers are changing all the time – so don’t be complacent.</td>
</tr>
<tr>
<td>Don’t be left behind</td>
<td>• Just do it. Consumer expectations and innovations in mobile technology are moving rapidly.</td>
</tr>
</tbody>
</table>
## Contact Information

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Email</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matthew Petrie</td>
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<td><a href="http://www.museumsassociation.org">www.museumsassociation.org</a></td>
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