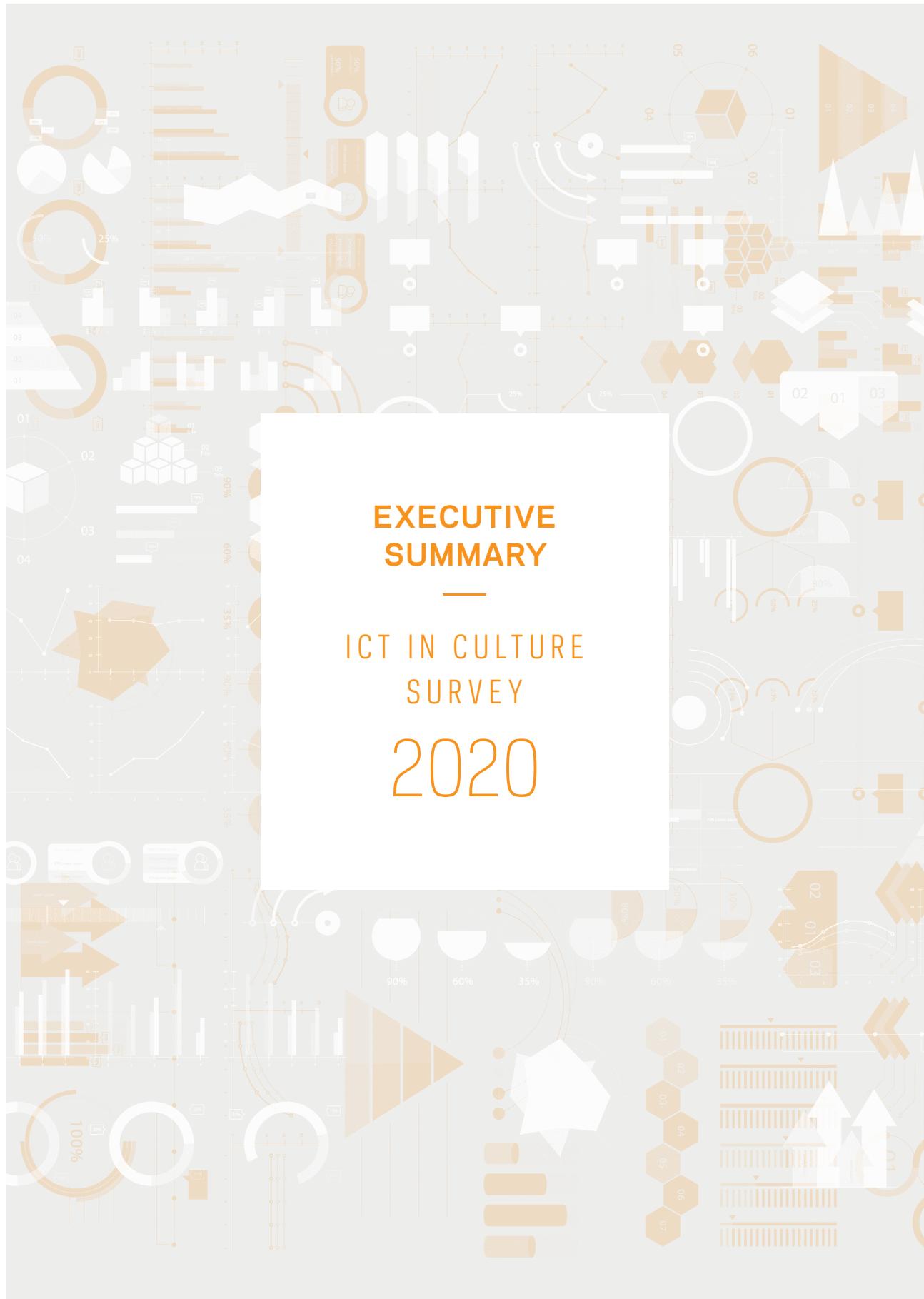


EXECUTIVE SUMMARY

ICT IN CULTURE SURVEY

2020



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Executive Summary

ICT in Culture 2020

In its third edition, the ICT in Culture survey was conducted between February and August 2020, covering the period when the first cases of COVID-19 in Brazil emerged and the health crisis was established, leading to the suspension of in-person activities and the closure of cultural facilities because of social distancing measures. Although the indicators were not designed to evaluate the impacts of the pandemic, the survey's results indicate the extent of ICT access, use, and appropriation in Brazilian cultural facilities in the period. Therefore, the data offers a detailed diagnosis of the existing institutional conditions in facing the challenges that were accentuated by the pandemic, and the need to migrate numerous activities to the digital environment.

Profile of institutions

In 2020, municipal governments were the main source of funding for most cultural facilities, with the exception of heritage sites and cinemas, whose resources were mainly donations from individuals and the sale of products or services, respectively. The annual revenue range of most institutions was up to BRL 50,000, with the exception of cinemas, which had higher average revenue, considering the 2019 fiscal year.

The survey results also pointed to low use of technology for fundraising: Less than 10% of institutions raised funds via websites, platforms or social networks, or even crowdfunding campaigns/websites, among all types of cultural facilities.

Most of those responsible for the institutions had completed tertiary education or graduate studies. Despite the high level of education, most had no specific training in cultural management and in technology use in cultural management. Even though about half of the managers of culture points (55%), theaters (50%) and museums (47%) had training in cultural management, less than one-third reported having received training on the use of technology in cultural management, regardless of the type of facility. A slightly higher proportion was found only among culture points (41%).

THE RESULTS OF THE ICT IN CULTURE 2020 SURVEY POINT TO THE NEED FOR INVESTMENT IN TECHNOLOGICAL INFRASTRUCTURE AND CONNECTIVITY IN CULTURAL INSTITUTIONS

ICT infrastructure

The results of the ICT in Culture 2020 survey point to the need for investments in technological infrastructure and connectivity in cultural

institutions. The proportion of those that did not use computers or the Internet in the 12 months prior to the survey was higher among heritage sites, libraries, and museums. Within the reasons given for not using the Internet, lack of infrastructure for Internet access in the region was mentioned by 15% of those responsible for libraries and 11% of those responsible for heritage sites and museums. The high cost of connection was indicated by 14% of heritage sites, 10% of museums, and 9% of libraries.

The availability of computers and the Internet for public use stood out among archives, libraries, and culture points (Chart 1). About half of these institutions had infrastructure that allowed the population to access digital technologies. The presence of Wi-Fi networks and free public access increased

among libraries and museums. This increase, especially among libraries, may have been the result of the closure of more precarious institutions and those in more remote locations – a change in the universe of existing libraries, rather than an improvement in their connectivity. Compared to the survey's historical series, among museums, there was also an increase in the use of mobile phones for work purposes (from 48% in 2016 to 63% in 2020).

ICT usage

The survey's historical series has shown an increase in the use of telephone or videoconference via the Internet in most types of cultural facilities investigated. Among e-government activities, emphasis goes to those related to financial and management practices, whether to search for information about and participate in calls for proposals to collect government resources, or to search for information about and pay taxes and fees online.

Offering online services, information or assistance to the public was widespread, but activities more focused on offering access to remote services directly through ICT remained underexplored (Chart 2). The sale of products or services over the Internet was considerable only among cinemas (58%), but even among these, online ticket sales or bookings did not reach one-third of institutions (31%). Carrying out online workshops or formative programs was also incipient in 2020, reaching just over one-fifth of archives (23%) and culture points (21%).

Cultural facilities continued to be more present on the Internet through online platforms or social networks than on their own or third-party websites, or on mobile phone or tablet applications (Chart 3). This presence varied depending on the profile of the institutions and their degree of Internet use.

This edition of the survey highlighted the expansion of the presence of museums on social networks, with 56% of institutions (compared to 48% in 2018). This was reflected in the greater proportions of all activities related to public relationships on these platforms, such as publicizing collections, projects or services (49%). Publicizing cultural programming and posting pictures of activities carried out were quite widespread on social networks, but publicizing video or audio recordings of these activities was less common.

The resources offered on the websites continued to focus on the publication of basic informational content to attract the public, such as institutional information (address, contact and opening hours), programming, and news about the institution. In turn, it was much less common for all types of cultural facilities to offer activities and services online, such as virtual visits, or live video streaming, despite an increase in the provision of streaming tools, especially among archives (23%), theaters (18%), and museums (9%).

Digital collections

The creation and dissemination of digital collections continue to be challenges for Brazilian cultural institutions. Although almost all of them had quite diverse collections, digitization was an incipient practice, with most institutions having digitized less than half of the items in their collections. The digitization of a portion of the materials was carried out by most archives (84%), museums (68%), culture points (66%), and heritage sites (57%). This did not necessarily correspond to the availability of the digitized collection to the public, and its availability on the Internet was even less common (Chart 4). Public access to these materials was most common at the

THE CREATION AND
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CONTINUE TO BE
CHALLENGES FOR
BRAZILIAN CULTURAL
INSTITUTIONS

CHART 1

CULTURAL FACILITIES BY COMPUTER AND INTERNET USE AND AVAILABILITY TO THE PUBLIC (2020)

Total number of cultural facilities (%)

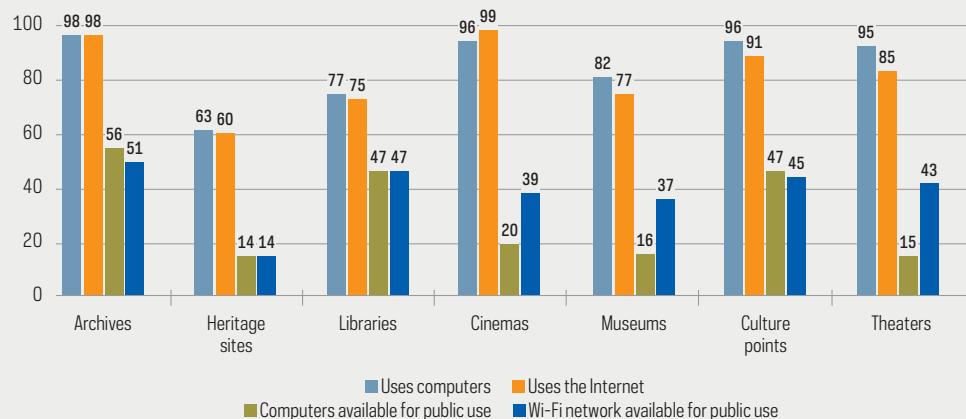
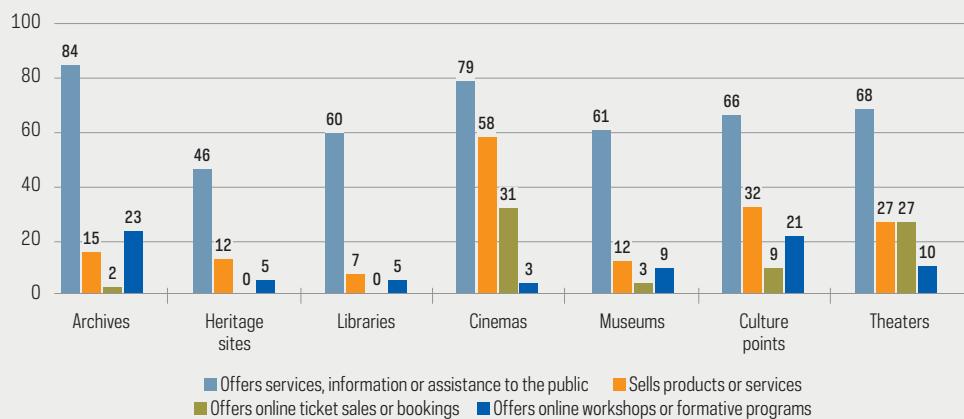


CHART 2

CULTURAL FACILITIES BY ONLINE ACTIVITIES CARRIED OUT AND SERVICES OFFERED ON THE INTERNET (2020)

Total number of cultural facilities (%)



60%

of heritage sites used the Internet

47%

of libraries offered free public Wi-Fi Internet access

27%

of theaters offered online ticket sales or booking services

21%

of culture points offered online workshops or formative programs

places where the institutions operated, and not remotely by digital means, such as on platforms or social networks, websites of the institutions or other institutions, or even in repositories of digital collections. Lack of funding, lack of qualified teams, and lack of hosting or storage capacity for digitized materials were among the most mentioned difficulties with digitizing collections.

Most of those responsible for archives, libraries, and museums declared that, in the processes for organizing collections, they used cataloguing rules, metadata standards, and standard language for the organization of objects. However, the provision of online collection catalogues or listings for consultation was carried out by only 33% of archives, 15% of museums, and 12% of libraries. Most managers of these institutions indicated that they had collection items that fell under public domain status, available for open use license or protected by copyrights managed by the institution, which was not reflected in the availability of these materials on the Internet.

Survey methodology

The aim of the ICT in Culture survey is to map ICT infrastructure, use, and appropriation in Brazilian cultural facilities. In 2020, the survey interviewed 2,193 managers responsible for archives, heritage sites, libraries, cinemas, museums, culture points, and theaters, who were randomly selected based on existing official records. Data collection was carried out between February and August 2020 using computer-assisted telephone interviews (CATI). The results of the ICT in Culture survey, including tables of estimates, totals, and margins of error, are available on the website <https://cetic.br>. The methodological report and the data collection report are available both in book format and on the website.

Barriers to ICT use

The level of ICT use and appropriation by Brazilian cultural facilities was related to financial conditions, technology management, and staff training in institutions. The results of the ICT in Culture 2020 survey pointed to low presence of IT areas or departments and a low number of institutions that hired IT services, which reached 50% only among cinemas. Likewise, training teams to develop or improve computer and Internet skills was reduced: just over one-third of archives and cinemas offered internal training, and about one-fifth of them paid for external courses, which was even less common among the other types of facilities. Among the most common difficulties mentioned by the managers of the institutions regarding ICT use were lack of financial resources to invest in technology and lack of training for teams to use computers and the Internet. These are barriers to be considered relative to the supply of goods and services and the development of activities in the digital environment, demands that have been amplified as a result of the COVID-19 pandemic.



CHART 3

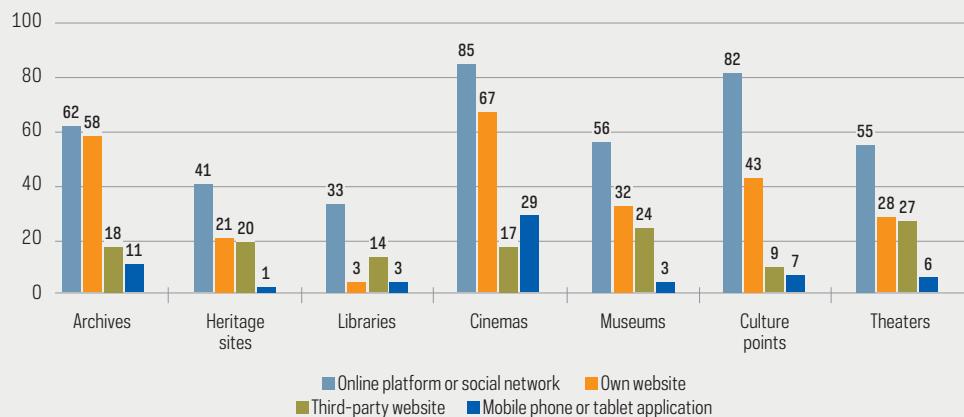
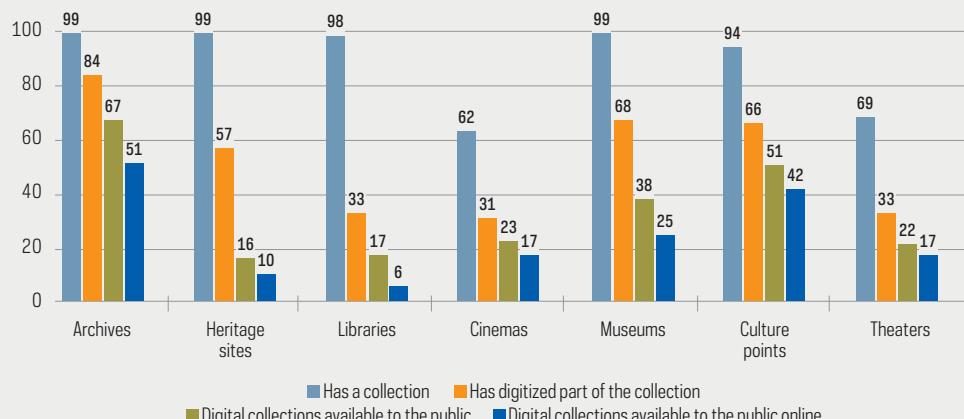
CULTURAL FACILITIES BY INTERNET PRESENCE (2020)*Total number of cultural facilities (%)*

CHART 4

CULTURAL FACILITIES BY PRESENCE, DIGITIZATION, AVAILABILITY OF DIGITIZED COLLECTIONS TO THE PUBLIC, AND ONLINE AVAILABILITY (2020)*Total number of cultural facilities (%)*



ABOUT CETIC.br

The Regional Center for Studies on the Development of the Information Society, a department of NIC.br, is responsible for producing indicators and statistics on the access and use of the Internet in Brazil, disseminating analyzes and periodic information on the Internet development in the country. Cetic.br is a Regional Study Center, under the auspices of UNESCO. More information at <http://www.cetic.br/>.



ABOUT NIC.br

The Brazilian Network Information Center – NIC.br (<http://www.nic.br/>) is a non-profit civil entity, which in addition to implementing the decisions and projects of the Brazilian Internet Steering Committee, has among its attributions: coordinate the registration of domain names – Registro.br (<http://www.registro.br/>), study, address and handle security incidents in Brazil – CERT.br (<http://www.cert.br/>), study and research network technologies and operations – CEPTRO.br (<http://www.ceptro.br/>), produce indicators on information and communication technologies – Cetic.br (<http://www.cetic.br/>), implement and operate Internet Exchange Points – IX.br (<http://ix.br/>), enable the participation of the Brazilian community in the global development of the Web and support the formulation of public policies – Ceweb.br (<http://www.ceweb.br>), and host the Brazilian W3C office (<http://www.w3c.br>).



ABOUT CGI.br

The Brazilian Internet Steering Committee, responsible for establishing strategic guidelines related to the use and development of the Internet in Brazil, coordinates and integrates all Internet service initiatives in the country, promoting technical quality, innovation and dissemination of the services offered. Based on the principles of multistakeholderism and transparency, CGI.br represents a democratic Internet governance model, internationally praised, in which all sectors of society participate equitable in the decision-making. One of its formulations is the 10 Principles for the Governance and Use of the Internet in Brazil (<http://www.cgi.br/principios>). More information at <http://www.cgi.br/>.



Access complete data from the survey

The full publication and survey results are available on the **Cetic.br** website, including the tables of proportions, totals and margins of error.

