Digital audiences: engagement with arts and culture online

1 Executive summary

1.1 Introduction

Every day millions of Britons engage with the arts and cultural sector through digital media.[1] This engagement comes in many forms and is in a constant state of evolution, driven by technological change. Five years ago, mobile phones were for texts and calls and Facebook barely existed. Today, a quarter of us have a smartphone through which we can listen to a song, or watch a trailer for an artistic performance.[2] Over 40,000 people track the Royal Opera House, and over 58,000 the British Museum, through Facebook; while FACT in Liverpool has 7,000 Twitter followers.

However, this research represents the first time that this online engagement with arts and culture in England has been captured and quantified.

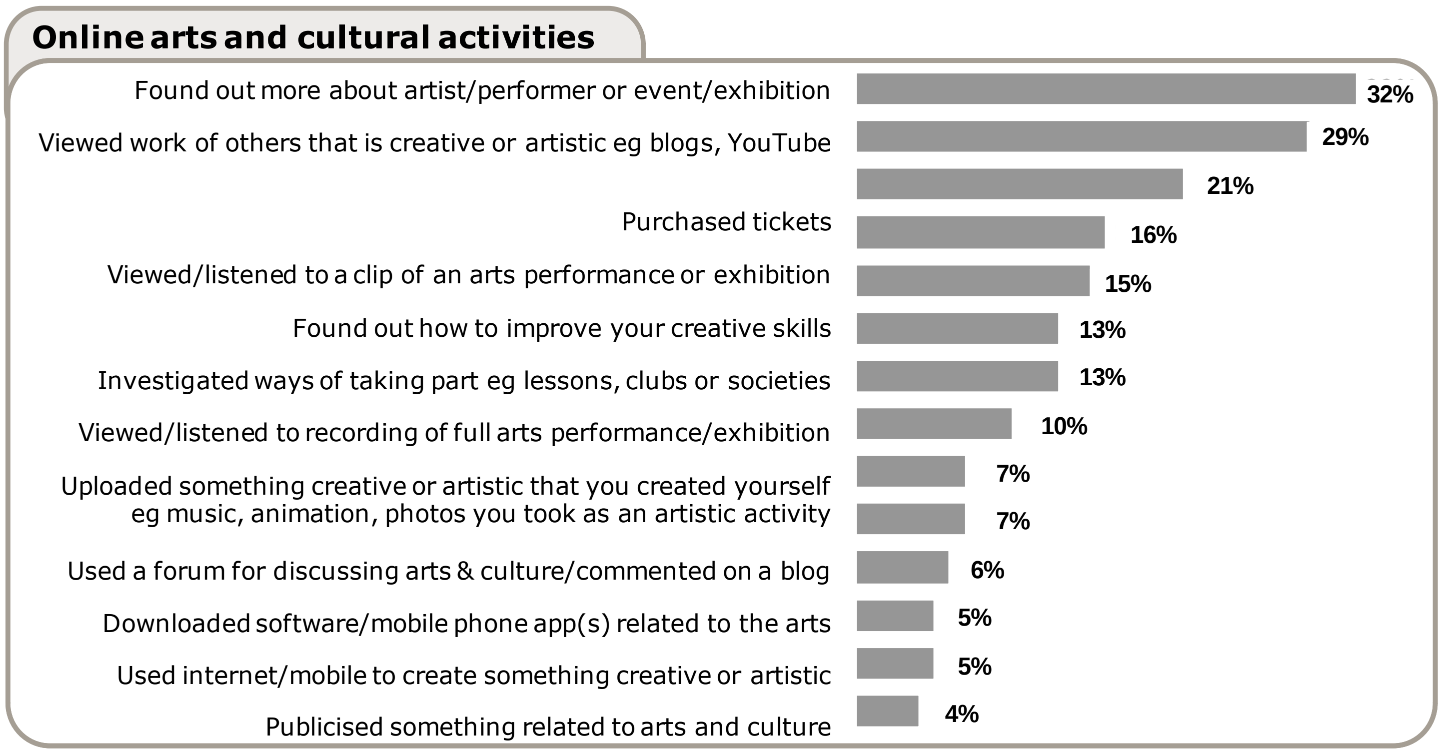
1.2 Overview of key findings

The findings in this report confirm that engaging with the arts through digital media is now a mainstream activity. Crucially, this engagement augments, rather than replaces, the live experience. Just as live music has grown stronger in the era of iTunes, so people still want shared, live experiences in other arts and cultural genres. However, this is not to demote the internet to the role of marketing channel: a significant minority of us use the internet to consume, share and create artistic content.

Specifically, our survey of a 2000-strong sample of the English adult online population finds that:

1. **Over half of the online population (53%) have used the internet to engage with the arts and cultural sector in the last 12 months:**
   - The most common activities centre around discovery of information about a live event or artist/performer (33%) and ticketing (20%)
   - Other key activities include watching or listening to a clip of an arts performance or exhibition (16%), whilst a further 8% had watched or listened to a full arts performance
   - 6% say they have used the internet to "create something artistic" in the past 12 months.

Exhibit 1: Online engagement with arts and culture in past 12 months



Base: English online population (n=2000)

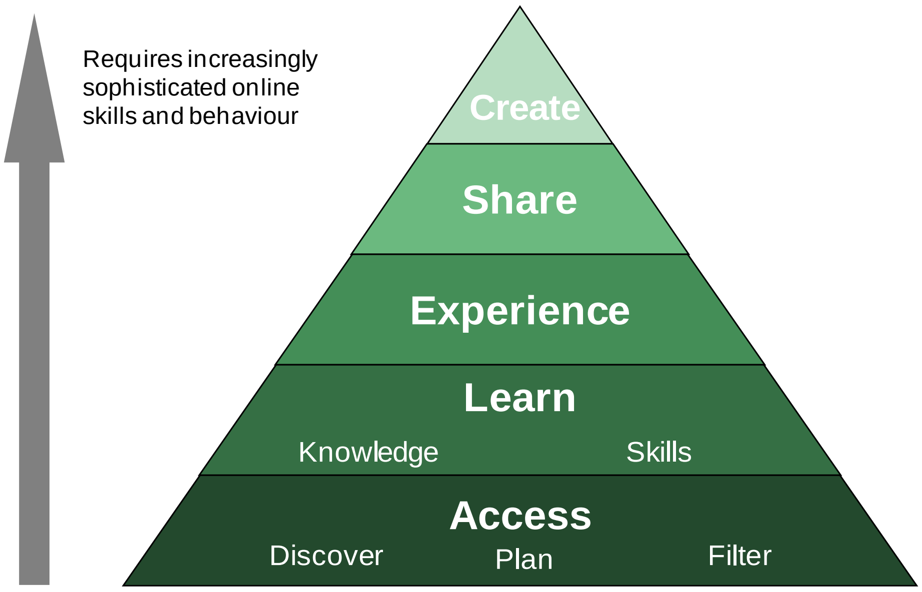
[1] This research was commissioned by Arts Council England, in partnership with Museums, Libraries and Archives Council (MLA) and Arts & Business. 'Arts and culture' refers to the breadth of organisations and activities represented by those bodies

[2] comScore, *Smartphone penetration data*, January 2010

2. Interaction with arts and cultural content in digital environments can be classified into five main categories: access, learn, experience, share and create:

- Access: discovering what's on, filtering opportunities and planning attendance or participation
- Learn: acquiring new skills and knowledge (for example, finding out more about the life of an artist)
- Experience: experiencing the full creative or artistic work online
- Sharing: using the internet to share content, experiences and opinions
- Create: use of the internet to assist with the creative process itself.

Exhibit 2: Benefits classification framework for online engagement with arts and culture



Note: Based on combined analysis of quantitative and qualitative research data.

3. People currently use digital media primarily as a complement to, rather than a substitute for, the live experience:

- The most prevalent online activities are those that support access to live events. This is also where the greatest proportion of people can see potential going forward
- People who watch/listen to online clips indicate that they are (in the main) doing so in order to sample, filter and decide what events or shows to see live
- Most people perceive the live offline experience as being superior to the online.

4. Music is the genre showing the highest level of online engagement – however, opportunities for other cultural genres remain strong:

- Of those who had viewed an online clip of an arts event, 81% had viewed a music clip. Dance (30%) and theatre (27%) were the next highest, followed by visual arts (19%)
- However, there appear to be clear opportunities for other genres: for example, 56% of museums fans and 47% of those interested in archives would like to take a virtual tour of the institution they were visiting online
- Similarly, five minute performance/exhibition clips appealed to nearly half of those with an interest in visual arts and 41% of dance fans, whilst 44% of dance fans said they would take a virtual tour backstage.

5. **Social media – and in particular Facebook – has become a major tool for discovering as well as sharing information about arts and culture, second only to organic search through Google and other search engines:**

    - Over half of the online population use social networking sites at least once a month – of these, around a quarter said they shared information on arts or cultural events with friends at least weekly
    - A further 15% of regular social networking users comment weekly on arts or cultural events whilst attending/watching.

6. **Brands are really important for audiences in discovering and filtering content online:**

    - In general, people feel they need credible assistance from trusted cultural brands such as the National Trust and British Museum to help them decide which experiences to look into
    - These trusted brands are particularly important for older audience members who tend to be concerned about online security
    - In addition, aggregator sites from trusted brands such as Guardian.co.uk, Time Out and View London play a key role - around half (54%) agree that they 'prefer to use websites that have information from a range of sources and about a range of organisations'

7. **People who engage with arts and cultural content online tend to participate in the arts through live events as well** - suggesting that digital media is more valuable as a means of reaching out to audiences that are already culturally engaged:

    - Only 1% of the online population have engaged in arts and culture solely online (with no offline attendance or participation) in the past 12 months
    - Attitudinally, those who can see the potential for digital media in arts and culture tend to be those who already enjoy arts and culture.

8. **People fall into five distinct segments based on their behaviour and attitudes to the arts and digital media. Three of these segments are of particular interest to arts and cultural organisations:**

    - **Confident core (29%):** Mainstream internet users, comfortable performing a range of tasks online, including purchasing tickets and using social and rich media. They have an active interest in the arts and culture and regularly attend or participate in live arts and cultural activities. This segment sees the internet as its primary channel for discovering, filtering, planning and buying tickets to live events
    - **Late adopters (21%):** Show relatively low confidence online – they will use email, Google and a few trusted sites. They may book tickets online, but social media and the mobile internet remain a mystery. This segment claims an active interest in the arts and culture although in practice they attend once in a while
    - **Leading edge (11%):** Technophiles, displaying 'early adopter' behaviour such as regular mobile internet access and downloading creative software. Passionate about arts and culture and very participative. Avid users of social media to arrange or share/comment on an arts experience. High expectations (as a result of their engagement with the most sophisticated forms of digital entertainment) can limit their satisfaction with current online arts and cultural experiences.

1.3 Strategic implications for the sector

The findings from this report clearly show that the internet is changing the way we consume, share and create arts and cultural content and experiences.

As a result of these changes, arts and cultural organisations are faced with a dizzying array of opportunities for broadening and deepening their engagement with their audiences. The internet is a marketing and audience development tool, but also a core platform for booking tickets, distributing content and delivering immersive, participative arts experiences (be that a Twitter book club, a location based mobile app guiding us through an exhibition, or something entirely different).

However, this research also shows that the direct revenue opportunities associated with many of these opportunities can be limited. Although exciting, the internet can represent additional cost without any guarantee of additional revenue: arts organisations will need to strike a balance between ambition and pragmatism when deciding where to invest their money in digital media.

One area of investment which can yield clear financial returns is marketing and audience development. The internet is a key route to finding out what is on and then filtering and planning attendance at live events. Arts organisations that are skilled in digital marketing will (all other things being equal) see more people through their doors than ones that rely on a brochureware website and email newsletters.

Equally, it is important not to relegate the internet to the role of marketing channel. Our respondents saw the internet first and foremost as augmenting the live experience rather than replacing it, but this did not just mean providing listings and e-ticketing. The Leading edge segment welcome and already use the (sadly few) genuinely immersive and participative arts and cultural experiences that are already available online. This report confirms that there is an appetite for the sector to innovate and create a new generation of experiences that take advantage of some of the internet's unique characteristics – however challenging that may be given the current economic climate.

The opportunities are exciting, but they do represent an additional cost. Arts organisations will need to strike a balance between ambition and pragmatism when deciding where to invest their money in digital media, especially as the current business models do not guarantee additional direct revenue.