Digital audiences: Engagement with arts and culture online

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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.

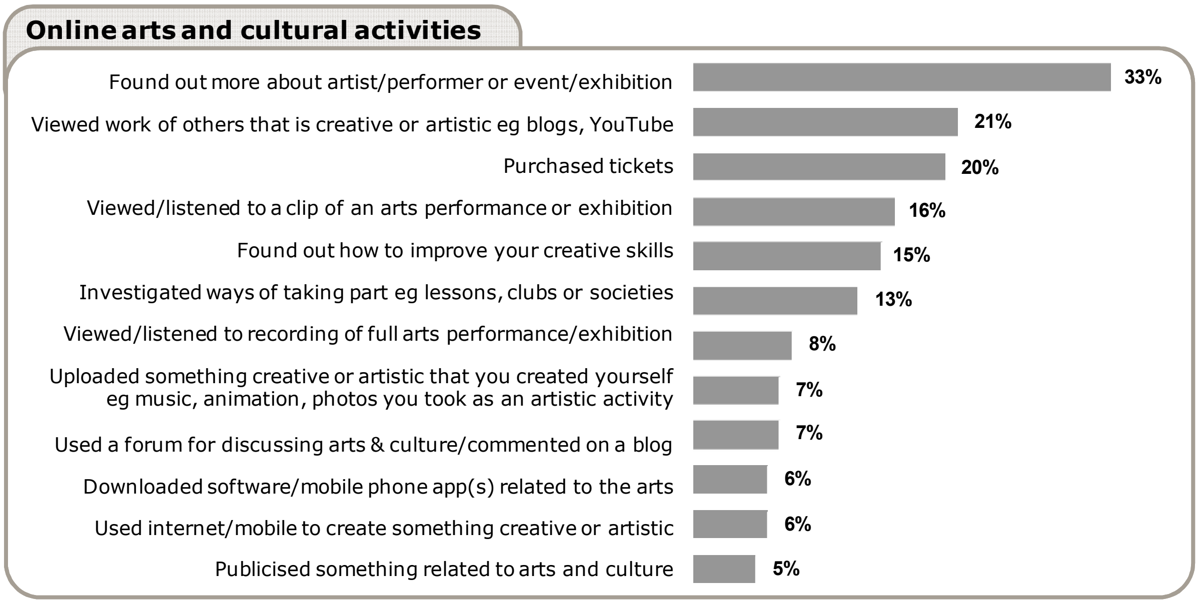
1.2 Overview of key findings

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

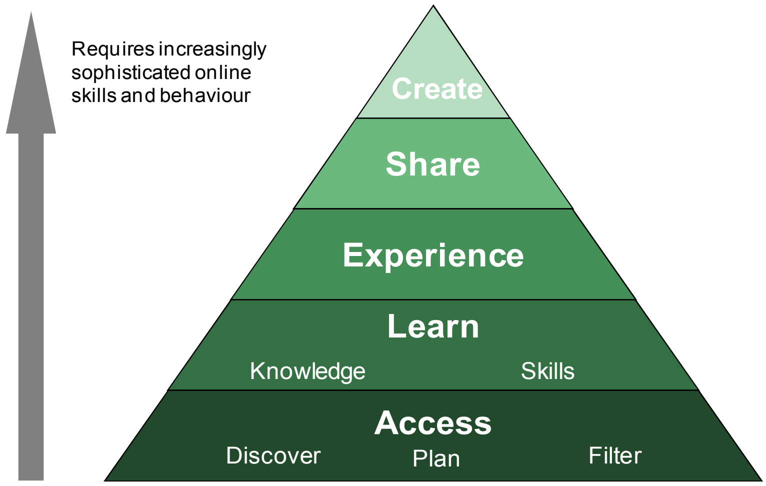


Base: English online population (n=2000)

[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 Jan 2010 Smartphone penetration

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.

2 Introduction

Digital media technologies are affecting every aspect of our society, economy and culture. Arts and cultural organisations can now connect with the public in new ways, bringing them into a closer relationship with culture and creating new ways for them to take part.

A great deal is already known about how the public is engaging with digital technology through the work of Ofcom and OxIS.[3] There is a large amount of information available on attendance and participation in arts and cultural activities through the Department for Culture, Media and Sport's Taking Part Survey.[4] Yet, to date, little has been known about the relationship between these two areas – notably about how people engage with the arts and culture online, and how online content can encourage physical attendance/participation.

Previous research by the Arts Council began to fill this insight gap by exploring qualitatively how the public perceives and interacts with the arts in the digital space.[5] This current research builds on that work, conducting a quantitative survey of 2,000 people, and some further qualitative research, to explore and quantify people's engagement with (and attitudes towards) digital technology, their engagement with (and attitudes towards) arts and culture and, crucially, the overlap between the two. The current research also builds on previous research which analysed the online presences of the organisations receiving regular funding from Arts Council England, by providing insight into the extent to which publicly funded arts and cultural organisations are meeting the expectations of the online audience.[6]

A key aim of this research is to generate insights into how can arts and cultural organisations use digital technology to deepen existing relationships with their audiences. The research has looked at whether it is possible to identify distinct groupings or segments of people in terms of their attitudes towards digital technology and towards arts and culture, and considers the implications of differing audience needs.

Section 3 of this report outlines the methodology and some qualifications regarding scope and applications. Sections 4 and 5 describe the findings on arts and cultural interests, online behaviour and how people engage online with arts and culture at present. Section 6 moves on to understand drivers and barriers to online engagement with arts and culture. Section 7 describes five broad groupings of the online population (based on a segmentation analysis) and explains their differing needs with respect to online engagement in arts and culture. Section 8 highlights implications for the sector and policy makers. The appendix gives further detail on the agencies that conducted, and commissioned, this research, and further data supporting the report.

[3] *The communications market 2010*, Ofcom, 2010; Dutton, WH, Helsper, EJ. and Gerber, MM, 2009. Oxford: Oxford Internet Institute, University of Oxford

[4] *Taking part: The national survey of culture, leisure and sport adult and child report 2009/10 London*, Department for Culture, Media and Sport (Involving Arts Council England, English Heritage, MLA, Sport England, 2010

[5] *Consuming digital arts: understanding of and engagement with arts in the digital arena amongst the general public*, Synovate 2009. London: Arts Council England

[6] *Digital content snapshot: A detailed mapping of online presences maintained by Arts Council England's regularly funded organisations*, MTM London, 2009. London: Arts Council England

3 The research approach

3.1 The research methods

The quantitative findings outlined in this report are based on an online survey of 2,000 adults aged 16+, representing the English adult online population.[7] The research focused on the online population because the internet (accessed through mobile and computer) was the key digital technology to offer potential for arts and culture organisations to develop their audience engagement at the time of research.

The sample for the survey was drawn from a consumer access panel.[8] It is recognised that skews are possible when working with online panels, such as in demographics and media use (variables relevant to the research issue at hand).[9] A quota control system was established during fieldwork, and weights were applied to the resulting data, to ensure that the recruited sample reflected the online English population.[10]

One key aspect of the research conducted was a segmentation analysis of the sample, to see whether it was possible to identify distinct groupings or segments of people on the basis of their attitudes towards digital technology and towards arts and culture. Firstly, a factor analysis identified correlated attitudinal variables and developed independent factors or dimensions. Cluster analysis then assigned individuals to distinct groups depending on their answers to the factored variables (see profiling data in Appendix 9.3).

Finally we conducted qualitative research into the characteristics and motivations of several of the groups identified by the segmentation analysis. For each of three segments, a 90 minute group discussion was held, moderated by an expert qualitative researcher. Each group contained eight members of the public who were recruited as representative of the segment via a detailed screening questionnaire (additional detail on the qualitative research approach is in exhibit 29).

3.2 Questionnaire design and piloting

The questionnaire was designed by drawing on a range of previous surveys including Taking Part and Ofcom and OxIS surveys.[11] It was also informed by previous research by Arts Council England (2009)[12] and Leadbeater (2009).[13] The questionnaire was piloted with six members of the public using face-to-face interviews conducted by a senior quantitative researcher. These interviews were ‘semi-structured’: there was a discussion around the respondents’ interpretations of the questions and answers, to allow the researcher to adapt the wording slightly and so improve the questionnaire design.

Additionally, a test launch took place: 10% of the target sample size for the project was achieved as a final ‘pilot’ exercise. The interim data was analysed to ensure the quality of responses received (the test launch was successful, so that the data from this 10% test sample is included in the final data set).

3.3 Qualifications and data interpretation

The scope of the project has been across England only, and focuses only on the online population (which includes those accessing the internet through computers and through mobile phones).

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[7] The focus was on England due to the statutory responsibility of the Arts Council as the national development body for the arts in England

[8] Toluna

[9] Helsper, EJ & Eynon, R, ‘Digital natives: where is the evidence?’, in *British Educational Research Journal* 36(3): 503-520, 2009.

[10] Specifically, the quota controls were based on: age, gender, region, socio-economic grade, digital TV in the household, level of internet use, mobile internet use, regular social networking use, viewing on demand content online. The source of the online population profile used for quota targets was the 2009 report on UK adults’ media literacy (London: Ofcom). See Appendix 9.3 for details, as well as comparison with the nationally representative Taking Part survey

[11] *Taking part: The national survey of culture, leisure and sport adult and child report 2008/09*, Department for Culture, Media and Sport, 2009. London: DCMS; *The communications market 2010*, Ofcom, 2010; Dutton, WH, Helsper, EJ and Gerber, MM. *Oxford internet survey 2009 report: The internet in Britain*, 2009. Oxford: Oxford Internet Institute, University of Oxford

[12] *Consuming digital arts: understanding of and engagement with arts in the digital arena amongst the general public,* Synovate, 2009

[13] Leadbeater, C, ‘The art of with’, 2009

On a sample of 2,000 respondents, the confidence limits for an observed percentage (often thought of as the margin of error) are within + or – 2% (at the 95% confidence level). A look-up table of confidence limits is included in Appendix 9.3.

It has been highlighted throughout this report when differences between subgroups of the sample (for example, males and females) are great enough that they are deemed to be statistically significant (at greater than or equal to the 95% confidence level) – in other words, that the probability of such a difference occurring by chance is quite negligible.

Where the quantitative research data compares different subgroups, reference is often made to the 'average' or 'index': the average of the total online population that the research has sampled.

Percentages in this report are based on weighted data, yet the base sizes quoted are the unweighted base sizes (i.e. the actual number of respondents providing answers).

3.4 Use of this project's segmentation analysis

This project has included an audience segmentation conducted on an attitudinal basis. This was always intended to be different to, and sit alongside, the existing Arts Council segmentation of cultural audiences, *Audience Insight.*[14] The intention is not to replace that segmentation, but to provide an additional lens through which cultural organisations can understand audience behaviour and more effectively plan to meet their needs.

It should also be noted that the existing Arts Council segmentation is designed to provide local-level data, which is not possible from the data that forms the basis of this report.

[14] Information on this can be found at www.artscouncil.org.uk/audienceinsight

4 Introducing the research sample

This chapter outlines the profile of the quantitative research respondents focusing on three areas: demographic characteristics, level of engagement in arts and culture and internet usage.

Key findings from this section:

- The internet plays a major part in peoples' leisure time and there are high levels of capability and confidence in using online technologies
- Significant amounts of online activities are now conducted using mobile phones – the growth of mobile internet has the potential to transform peoples' behaviour
- Many of the online activities that could have relevance for arts and cultural organisations are now extremely widespread across a range of market sectors including communication, information searching, shopping and viewing creative work
- The online population is very culturally engaged: nine in ten attended or participated in a live arts or cultural event in the past 12 months
- Interests are varied:
  - 77% are interested in music and 68% read for pleasure while at the more niche end of the cultural spectrum, 18% are interested in archives
  - 42% have attended libraries and 40% have attended museums or galleries in the past 12 months, whilst only 5% have attended archives/record offices and 5% have participated in performance arts.

4.1 Demographic profile

The Digital Audiences research sample represents the online population, and is therefore slightly younger and more affluent than the overall English population. Quota controls set on fieldwork, and weighting of the resulting data, ensured that the sample profile matched available data about the wider population.[15]

Ofcom found that 72% of adults in England had internet access at home in 2009.[16] Thus, the Digital Audiences research sample is representative of that 72%.

Exhibit 3: Demographic profile of Digital Audiences sample

Gender	Male	52%
	Female	48%
Age	16-24	16%
	25-34	22%
	35-44	23%
	45-54	17%
	55-64	12%
	65+	9%

Region	North	26%
	Midlands	31%
	South	43%
Working status	Working	59%
	Housewife/carer	8%
	Student	8%
	Retired	13%

Base: English online population (n=2000)

[15] See previous section, and also Appendix 9.3

[16] Ofcom Communications Market, 2009. Nations and Regions – England. London: Ofcom

4.2 Arts and cultural interests

Of the sample, 92% claimed to be ‘interested’ in at least one of the list of arts and cultural areas we presented to them (see first column of exhibit 4 below). Around 90% had actively engaged in the past 12 months, through either:

- Attendance at a live arts event, museum, archive or library (76%; see second column)
- Or, participating in some kind of arts and cultural activity (81%; see third column).

These levels of engagement are extremely similar to those seen in the Taking Part data for those respondents who have internet access at home (see Appendix 9.2). From Taking Part, it is clear that the online population tend to be more highly engaged with arts and culture than the non-online population.

Exhibit 4: Arts and cultural interests and activities over the past 12 months (P12M)

Interested in		Attended in P12M		Participated in P12M	
Music	77%	Library	42%	Literature	72%
Museums	56%	Museum or gallery	40%	Reading	68%
Theatre	45%	Performance arts	36%	Written stories/plays	8%
Libraries	39%	Play/drama	19%	Written poems	7%
Dance	28%	Other theatre performance	19%	Written a blog	7%
Literature	25%	Street arts or circus	12%	Visual arts	31%
Visual arts	22%	Contemporary music	31%	Crafts	15%
Archives	18%	Live rock/indie gig	17%	Painting, drawing, printmaking, sculpture	14%
		Live pop performance	15%	Photography	12%
		Music festival	9%	Creating original artwork/animation on computer	9%
		Live urban performance	5%	Made film/video	4%
		Visual arts	25%	Music	19%
		Exhibition/collection of art, photography or sculpture	17%	Played instrument for oneself	13%
		Public art display or installation	10%	Composed music	5%
		Craft exhibition	9%	Sang to an audience	5%
		Video/electronic art event	4%	Played instrument to others	5%
		Combined arts events	16%	Remixed music	4%
		Carnival	12%	Dance	8%
		Culturally specific festival	6%	Other	7%
		Dance	16%	Ballet	2%
		Other event/performance	9%	Performance arts	5%

Interested in (cont.)		Attended in P12M (cont.)		Participated in P12M (cont.)	
		Ballet	4%	Play/musical/opera	4%
		Contemporary dance	4%	Street arts	2%
		African/South Asian/Chinese dance	4%	Combined arts (carnival/ festival)	5%
		Traditional music	14%		
		Classical music	8%		
		Opera/operetta	6%		
		Jazz	5%		
		Literature event	5%		
		Archive/record office	5%		
Any of the above	**92%**	**Any of the above**	**76%**	**Any of the above**	**81%**
		Any attendance or participation			**90%**

Base: English online population (n=2000); question text and lists of activities were based on Taking Part

4.2.1 Attitudes towards arts and culture

Just under one quarter (23%) of the English online population consider themselves 'passionate about arts and culture' and one third (33%) 'would like to be more involved with arts and culture'.

At the other end of the spectrum there is a disengaged group (23%) who believe that 'people like me don't get involved with arts and culture'. More people agreed with this statement than claimed 'no interest' in the specific arts and cultural forms presented in exhibit 4. This can be explained by the use of the phrase 'arts and culture' in the second question, which may be a label that feels removed from some people's day-to-day experiences. [17]

Attitudes demonstrate familiar patterns across different demographic groups.[18] Those most likely to feel 'passionate' about arts and culture tend to be younger (31% of 16-34 year olds versus 23% of the whole sample), more educated (30% of those with higher education qualifications), with a leaning towards being female (26% versus 20%). Those who are least 'passionate' tend to be of a lower social grade (15% of grades C2DEs), with lower household income (20% of those earning <£20,000 per annum) and of a lower educational level (9% of those whose educational attainment is less than five GCSE/O levels at grades A-C).

Many members of the population are keen on learning about subjects that interest them:

- 76% 'enjoy finding out about topics/subjects of interest (e.g. bird watching, WWII, fashion)'
- 51% 'enjoy finding out about my family history'
- 51% 'enjoy finding out about the things that I collect'.

The desire to find out about topics/subjects of interest is significantly more prevalent among those of higher educational backgrounds (81%) and social grade ABC1 (79%). Family history appeals more to females

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[17] Supported by the previous qualitative research: *Consuming digital arts: understanding of and engagement with arts in the digital arena amongst the general public*, Synovate, 2009. London: Arts Council England
[18] Statistically significant differences (at 95% confidence level)

(55% versus 47% of males), whilst information about collectibles appeals more to males (55% versus 46% of females).[19]

4.3 Internet and technology use

To fully introduce the research sample, this section provides an up-to-date snapshot of attitudes and behaviours with respect to internet usage today.

4.3.1 Confidence and enjoyment of digital technology

Most people enjoy using new technology, with 61% agreeing that they 'love new technology' and only 10% disagreeing. A smaller number claim to 'stay up-to-date with cutting-edge technology' (34% agree) which is to be expected, given established theory about adoption patterns for new products.[20]

Most people feel 'confident in doing a wide range of things online, e.g. emailing, uploading photos, downloading music etc' (79%). Only 7% disagree with this statement.

This confidence with online activities is more prevalent amongst the younger respondents (86% of 16-34 year olds) and males (82% versus 76% of females), with a notable social grade effect as well (ABC1s are significantly more likely to agree that they are confident than C2DE respondents: 83% versus 73%).[21]

Although fewer people are confident in their mobile phone abilities, 54% still agree that they are 'confident doing a wide range of things on my mobile phone, e.g. calling, texting, taking photos, accessing the internet', whereas 24% disagree.

Mobile phones are equally accessible to men and women, and those of differing educational and social backgrounds. However, there is a striking age-related trend: 16-34 year olds are over three times more likely to label themselves as 'confident' with mobile phone technology than the over 55 year old age group (76% compared with 22%).[22]

4.3.2 Dominance of the internet in leisure time

The internet is now the media space where people spend the most leisure time (even longer than watching TV). The following are weekly averages for estimated time spent, across the sample of 2,000:

- 25 hours: Online leisure time
- 12 hours: Watching TV (apart from sport and movies)
- 4 hours: Watching movies on TV
- 4 hours: Playing video games
- 3 hours Watching DVDs/Blu-rays
- 3 hours: Watching sport on TV

Additionally, the majority find the internet 'important' (although the nature and degree of this attachment varies across user types), as this quote from qualitative research illustrates:

> *'When I haven't got the internet I just feel completely lost… it's scary how much you rely on it…'*
> *18-24 year old*

[19] Statistically significant differences (at 95% confidence level)
[20] Bohlen, Beal and Rogers, *Validity of the concept of stages in the adoption process*,1957
[21] Statistically significant differences (at 95% confidence level)
[22] Statistically significant differences (at 95% confidence level)

4.3.3 Mobile internet access is not yet mainstream but has begun to change behaviour

Of the respondents, 52% believe that they have a mobile phone capable of accessing the internet (likely to be underestimated due to some people not having full awareness of their phone's capabilities). Around two thirds of those who have the capabilities access the internet on their mobile phone, which represents 34% of the English online population.[23]

Within this subgroup of people using their mobile phones to access the internet, around one quarter use their mobile internet on a daily basis.[24]

Consumers who use the mobile internet on a daily basis regularly report that it has transformed the way they behave and think:

> *'I'm always connected to the internet because of my phone' 18-24 year old*
>
> *'Once you get an iPhone it changes how you think… you use it for a lot more things' 25-44 year old*

4.3.4 Prevalence of online information searching and communication

Use of the internet for information searching is widespread among the online population (80%), as is online shopping (75%).

Exhibit 5 shows a range of online activities that are conducted regularly in leisure time, the proportion of people conducting these activities using a computer (including laptops), and the proportion of people conducting these activities using their mobile phone. [25]

Exhibit 5: Online activities engaged in regularly during leisure time

Activities conducted regularly online	Total (computer/ mobile)	Using the internet on a computer	Using a mobile phone [26]
Emailing	87%	86%	14%
Searching for information	80%	78%	14%
Shopping/buying goods or services	75%	75%	5%
Visiting specific websites of interest	71%	71%	9%
Finances (e.g. banking, paying bills)	63%	62%	4%
News/newspaper websites	56%	56%	9%
Social networking sites (e.g. Facebook, Twitter, Bebo, etc)	45%	44%	12%
Watching/listening to on demand content (e.g. on BBC iPlayer, 4oD, ITV player, Demand Five etc)	33%	32%	3%
Instant messaging	33%	31%	8%
Selling goods (e.g. eBay)	32%	31%	3%
Viewing the work of others (e.g. blogs, YouTube)	31%	31%	3%
Watching/listening to live TV/radio	29%	28%	4%

[23] Since the Digital Audiences research sample represents the 72% of the total English population who are online, this equates to approximately 25% of the total population

[24] This is 9% of the total research sample, which equates to approximately 6% of the total English population.

[25] Question was 'What do you regularly use the internet for in your spare time when using the Internet on your PC/laptop?' and '…on your mobile phone?' In other words, regularly was self-defined. The question continued: 'When thinking about your answers, please consider your personal leisure time only and do not include any time you may spend as part of any paid work, academic study or any activities organised by a school.'

[26] The final column presents data regarding activities conducted using a mobile phone. This part of the question was only asked of those respondents who had previously indicated that they use the internet on their mobile phone. The results are provided as percentages of the entire online population to enable comparability across columns

Activities conducted regularly online (cont.)	Total (computer/ mobile)	Using the internet on a computer	Using a mobile phone
Video/computer games	28%	27%	3%
Streaming/downloading music (e.g. iTunes, podcasts, Spotify)	25%	24%	3%
Telephone calls (e.g. Skype)	18%	17%	n/a
Learning how to do something (e.g. playing guitar)	14%	14%	2%
Researching your family tree	12%	12%	1%
Reading/downloading ebooks	11%	10%	2%
Creating, uploading or sharing content (e.g. YouTube, blogging, Flickr)	10%	10%	2%

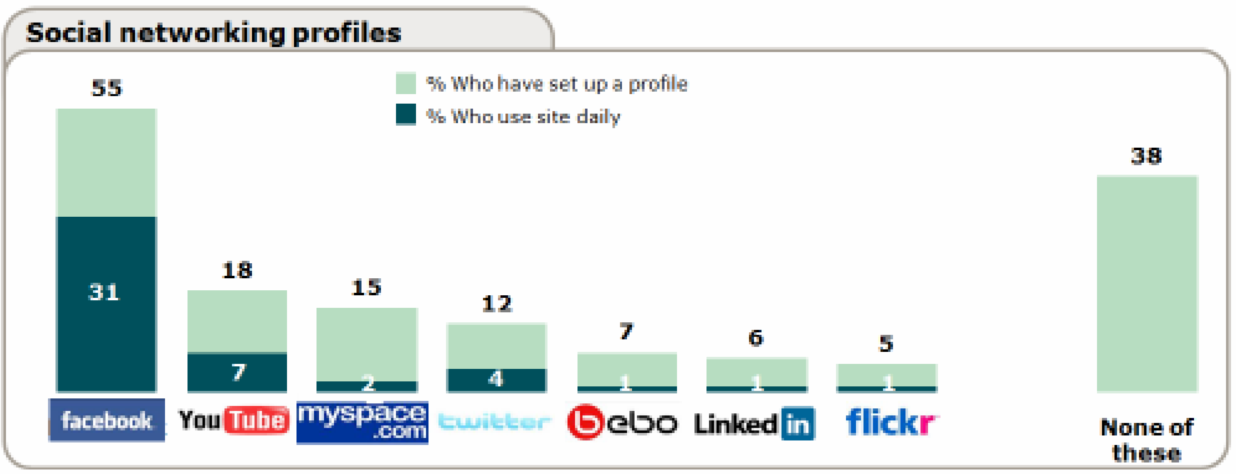
Base: English online population (n=2000). Note: Question was "What do you regularly use the internet for in your spare time when using the internet on your PC/laptop?" and "…on your mobile phone?"

Among the activities conducted using the mobile phone, the most common include social networking, email and information searching. Engagement with these activities via mobile phone skews heavily towards the 16-24 age group. The young profile and rapid growth of this behaviour in recent years suggests mobile internet use will continue to grow and become mainstream within a few years.

The vast majority of the online population now regularly communicate online in their leisure time: 87% by email, 45% by social networking and 33% by instant messaging.

62% have set up a profile (or registered) with at least one of the social networking sites shown in the exhibit below.[27] The figure rises to 84% of 16-34 year olds having set up a profile, compared to 35% of over 55 year olds.

Exhibit 6: Prevalence of using major social networking sites



Base: English online population (n=2000)

[27] The exhibit does not show all the sites presented in the questionnaire. Also asked were Blogspot (2% set up a profile), Ning (1%), Tumblr (1%) and three sites where less than 1% had set up a profile, resulting in a total of 62% who have set up a profile with at least one site

5 Measuring online engagement with arts and culture

Key findings from this section:

- Over half (53%) of the online population have used the internet to engage with arts and culture in the past 12 months. This rate is higher among young adults
- A significant minority (18%) of the online population have chosen to use the internet on their mobile phone to engage with arts and culture (much higher among younger people)
- Those engaged in arts and culture online are also engaged in arts and culture offline. There is great potential for cross-promoting and cross-fertilising audiences
- Digital engagement appears to complement and reinforce live engagement rather than act as a substitute
- Currently, online activity is mostly focused on searching for information (about artists/performers and events), with search engines the most common method of discovery
- 16% of people report viewing/listening to clips online, whilst 8% report viewing full performances/exhibitions online
- Importantly, people's desire to view arts and cultural content (such as clips and virtual tours) across all genres is much greater than actual levels of consumption, suggesting that there may be untapped demand
- Music tends to lead the way in online consumption (perhaps reflecting greater supply in this art form), although there is also a smaller amount of consumption for other genres such as theatre and dance
- Ticket purchasing online is now fairly mainstream behaviour (20%) and is the only prevalent type of online activity involving financial transactions at present
- People regularly share information about arts and cultural content or events through social networks (predominantly Facebook and Twitter), suggesting these sites are now a key marketing channel.

5.1 Audiences can see the potential for digital technology to enhance their enjoyment of the arts

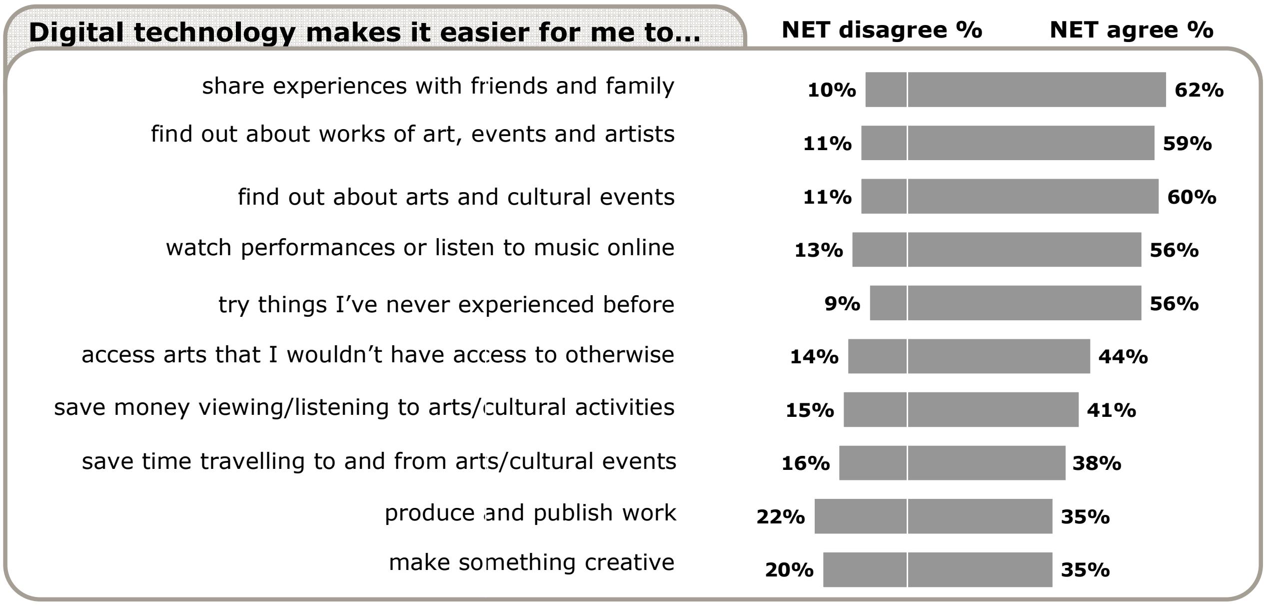
Most respondents could see a role for digital technology in facilitating their sharing of and access to arts and culture (see exhibit 7 below).

The perceived benefits of digital technology are strongest around marketing and discovering information.[28] This may reflect the nature of content available on websites currently supplied by arts and cultural organisations.[29]

[28] Respondents to the question illustrated in exhibit 7 were instructed to consider the phrase 'digital technology' to mean 'such as the internet, mobile phones and other digital media'. They are therefore likely to have considered the use of mobile phones for calls and texts as well as mobile internet, and will certainly be referring to email, social networking and probably also the use of digital TV and DAB radio

[29] *Digital content snapshot: A detailed mapping of online presences maintained by Arts Council England's regularly funded organisations*, MTM London, 2009. London: Arts Council England

Exhibit 7: Views regarding the benefits of digital technology for arts and cultural engagement



Base: English online population (n=2000).[30]

5.2 Prevalence of existing online engagement

Just over half (53%) of the online population use the internet to complement their live engagement with arts and culture. This rises to 62% among the 16-34 year old age group.

The most common activity is to find out information, which is consistent across age groups (see exhibit 8 below). Most of the other activities listed in the exhibit below are significantly more prevalent among the 16-34 year old age group (see Appendix 9.4 for a version of exhibit 8 split by age group).

Less common (but still significant) areas of activity include consumption of audio-visual content, uploading or creating content or publicising views and information.

Music is the art form for which clips are most commonly viewed online - 81% of those who have viewed/listened to online clips have done so with respect to music (unweighted base is 341 respondents). It is likely that the majority of this behaviour relates to contemporary music (although the survey did not record that degree of granularity) and that most of the clips are viewed from YouTube (which is responsible for over half of all video clips viewed in the UK as of November 2010).[31]

The art forms next most associated with online clips are dance (30% of those 341 respondents who have viewed/listened to online clips) and theatre (27%), followed by visual arts (19%), literary performances such as poetry or book readings (11%) and exhibitions (10%).

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[30] Note: figures are a 'net' of the top two and bottom two boxes from a five point scale. Middle box 'Neither agree not disagree' is not shown: hence, figures in each row in the exhibit do not add to 100%

[31] Comscore Media Metrix, November 2010

Exhibit 8: Online activities with respect to arts and culture

Activities conducted online in the past 12 months (P12M)	Total (computer and/or mobile)	Conducted activity using the internet on a computer	Conducted activity using a mobile phone[32]
Found out more about artist/performer or event/exhibition	33%	31%	3%
Viewed the work of others that is specifically creative or artistic (e.g. reading blogs, watching YouTube)	21%	20%	3%
Purchased tickets	20%	20%	1%
Watched or listened to a clip of a recording of an arts performance/exhibition	16%	15%	3%
Found out how to improve your creative skills	15%	14%	2%
Investigated ways of taking part in arts and culture (e.g. lessons, classes, clubs or societies)	13%	12%	2%
Watched or listened to a recording of a full arts performance/exhibition	8%	7%	2%
Uploaded something creative or artistic that you created yourself (e.g. music or animation you created yourself, photos you took as an artistic activity)	7%	6%	1%
Used a forum for discussing or sharing arts and culture or commented on a blog	7%	6%	1%
Downloaded software or mobile phone apps related to the arts	6%	6%	2%
Actually use the internet or your mobile phone to create something creative or artistic	6%	5%	2%
Publicised something related to arts and culture	5%	4%	1%

Base: English online population (n=2000)
Note: Question was 'Please indicate whether you have done any of the following using the internet within the past 12 months?' and, for relevant respondents, '… on your mobile phone within the past 12 months?'

Music is also the most popular art form for viewing/listening to full recordings online: 86% of the un-weighted base of 162 respondents who have viewed/listened to a full recording online have done so with respect to music. This is followed by dance (36%), theatre (28%), visual arts (22%), exhibitions (18%) and literary performances such as poetry or book readings (12%).

In addition to representing actual usage and therefore providing an indication of demand, this data is also an indicator of the nature of current supply by arts and cultural organisations. For example, online clips and recordings are much more widely available for music than for other genres. Were other genres to more commonly embrace online clips and recordings, it is possible that audiences could increase.

[32] The final column presents data regarding activities conducted using a mobile phone. This part of the question was only asked of those respondents who had previously indicated that they use the internet on their mobile phone. The results are provided as percentages of the entire online population to enable comparability across columns

5.2.1 Mobile internet activities

Accessing arts and cultural content through mobile phones is much less prevalent than accessing through computers. This is to be expected given the current penetration of mobile internet use (seen earlier in 4.3.3). The usage seen in exhibit 8 is almost exclusively confined to the 16-34 year old age group, because of their greater confidence with using mobile phones for a greater range of functions and their higher likelihood of having a mobile phone with this capability.

Ticket purchasing is much less common on mobile internet than on a computer, reflecting security concerns, low user confidence and limitations in mobile sites. Watching/listening to live performances and uploading creative or artistic content is also relatively less common on mobile phones, probably due to costs of network data charges, limited technical capability of many mobile phones, and smaller screens that can potentially limit user enjoyment.

There are two additional activities that can only be conducted via mobile phones, and they illustrate the increased convenience and immediacy of mobile internet access. Of those who use the internet on their mobile (n=792)[33]:

- 9% 'used GPS on your mobile phone to get arts and cultural listings in your area' (which equates to 3% of the whole sample)
- 6% 'tweeted whilst watching a live performance' (which equates to 2% of the whole sample).

Whilst these proportions are relatively small, take-up is likely to grow rapidly. These mobile features provide an exciting marketing opportunity due to their ability to offer people information that is location and occasion specific.

5.2.2 Online-only engagement in arts and culture

Just 1% of the English online population claim to have engaged with arts and culture online in the past 12 months but say they have not attended any live events/venues or otherwise participated in live arts and culture in the past 12 months.

This subgroup is too small to profile in detail, but their online activities include watching/listening to five minute clips, viewing the creative work of others and looking for information online. As we will see further in section 6, there is no indication from this research that the preferred mode of arts and cultural engagement is shifting from live to online, so we do not expect to see this group growing dramatically even as more and more people begin to engage online. Instead, the very small size of this group reinforces the idea that online engagement with arts and culture offers opportunities to broaden offline engagement rather than substitute for it.

5.3 Finding information about arts and culture online

When asked 'How do you go about finding new arts and culture related websites?' the vast majority (85%) selected the response 'Google':

> *'If you've got a computer, it's the easiest way to find out what's on' 45-65 year old*

1% of respondents mentioned a range of alternative providers such as Yahoo, Ask.com and Bing.

Recommendations from friends or family were the second most common route for discovering arts and culture related websites (37%), which (like Google) is consistent across all subgroups of the sample.

Other routes are 'following links from arts or cultural websites you are already on' (18%) and 'following adverts on social networking sites, e.g. Facebook' (14%). There are significant variations by age for both these routes: following links from other arts or cultural websites becomes more common with increasing age

[33] Unweighted base

(22% of over 55 year olds), whereas the use of links from social networking sites is more common among the younger age groups (25% of 16-34 year olds).[34]

5.4 Use of social networks

Social networking has now become a major tool for discovering and sharing information about arts and culture, as shown in the exhibit below, based on the 55% of the online population that claimed monthly use of one of the sites shown in exhibit 6.

Exhibit 9: Frequency of conducting social networking activities

General social networking activity (as a comparison point)	Daily	Weekly	Monthly	Less often	Never
Status update	19%	28%	15%	30%	9%
Activity relating to arts and culture					
Share information on arts or cultural events with friends	5%	19%	15%	24%	37%
Look for information or offers about an arts or cultural event	4%	14%	15%	23%	45%
Comment on an arts or cultural event whilst attending/watching it	3%	12%	11%	20%	54%
Look for information on an artist or artwork after you've been to an arts or cultural event	3%	12%	15%	23%	47%
Share your experiences of an arts or cultural event (e.g. uploading a photo or video or commenting on an event)	3%	11%	18%	23%	45%
Organise an arts or cultural event with a friend	2%	10%	10%	23%	56%
Become a fan of an arts or cultural organisation	2%	11%	15%	24%	47%
Participate in an arts or cultural event	2%	10%	12%	22%	54%

Base: Those using social networking sites at least once a month (n=1089).
Note: Question was 'Please indicate, for each of the following activities, approximately how often you do them on any of the social networking sites you mentioned. By arts or cultural event we are referring to live music, theatre, exhibitions, etc'

Two thirds of regular social network users share information on arts and culture through social networks at least once a month (this equates to 34% of the total online population). Nearly one quarter do so at least weekly, whilst a quarter also claim to become a fan of an arts or cultural organisation at least once a month.

All of these behaviours are most common among the 16-34 year old age group. Weekly status updating rises from 47% to 61% and weekly sharing of information on arts and cultural events rises from 24% to 30% amongst 16-34 year olds.[35] Prevalence declines with age but there are also some people in the 55+ age group who conduct some of these social networking behaviours. A full table by age group is included in Appendix 9.4.

These findings suggest that social networking sites provide a significant boost to awareness of arts or cultural events, both by enabling passive discovery of information that other people are posting and also by enabling an active search for information. Much of the social networking site activity described in exhibit 9 takes the form of personal recommendations, received from those in a person's network (with whom there is presumably some kind of personal connection), and therefore represent a valuable form of brand advocacy.

[34] Significantly different across age groups, at the 95% confidence level
[35] Statistically significant differences (at 95% confidence level)

Whilst it is difficult to forecast the extent to which social networking in its current form will be common in the future, it is clear that today's social networkers are experiencing benefits that will affect their future expectations from communications platforms.

5.5 Online spend on arts, cultural and creative activities

Most of the online population do not spend money online on arts, cultural and creative activities, apart from ticket purchasing (see 6.8 for more about people's *propensity* to pay). Ticketing tends to take place either with agencies (57% of the unweighted base of 427 respondents that have purchased tickets online using either a computer or mobile phone), or direct from the arts or cultural organisation providing the performance/event (77% of the 427 respondents).

The data on spend levels should be taken as a 'rough guide' only: the sample sizes for spenders for most activities were too small to be robust and a retrospective estimation of a whole year's spend may not result in accurate estimates.[36]

Exhibit 10: Claimed online arts and cultural spend in past 12 months (using a computer)

Online arts/cultural/creative activity	Proportion of online population that have conducted activity via computer in P12M	Proportion of those who have conducted this activity who have actually spent money	Mean average annual spend of those people that claim to have spent money
Purchase tickets online for artistic/cultural events	20%	92%	£111 (typically £20-50)
View/listen to clip of recorded arts performance/exhibition	15%	14%	£25 (typically £1-10)
View/listen to entire recorded arts performance/exhibition	7%	28%	£44 (typically £1-10)
Download creative software/tools/apps	6%	52%	£70 (typically £1-50)
Upload creative content	6%	31%	£46 (typically £1-10)
Create art online	5%	38%	£44 (typically £1-10)

Base: English online population (n=2000)/Those who have participated in activity/Those who have actually spent money (varies for each activity)

Clips of recorded arts performances or exhibitions are likely to be sourced free of charge, with only 14% of the population that view/listen to these on the computer actually paying for them (see exhibit 10 below). Not all of these 14% will pay for every clip they access, so the actual proportion of clips paid for is likely to be lower than 14%. The majority of the non-paid audio-visual consumption is likely to be on YouTube and

[36] Respondents were asked about their level of spend on online activities relating to arts and culture, based on the activities they had conducted in the past 12 months (from exhibit 8). For example, respondents were asked 'On average, how much do you spend per year (in £s) viewing or listening to entire recorded arts performances or exhibitions on your PC/laptop? If you only view free content, please enter '0'. Do not include your monthly internet/telephone subscription fee.'

potentially Facebook (now the third biggest video site, according to comScore's 2010 results).[37] It is highly likely that the paid consumption is predominantly made up of purchases on iTunes, although the sample was not sufficiently granular to capture this.

Spend tends to be higher for those making arts and cultural purchases on a computer rather than a mobile phone. Presumably, this effect arises through a combination of available site functionality (i.e. mobile sites facilitating easy payment options are not yet widely available), perceived/actual safety and process familiarity. It is likely that those spending money via their mobile phone are also spending via a computer.

Exhibit 11: Claimed online arts and cultural spend in past 12 months (using a mobile phone)

Online arts/cultural/creative activity	Proportion of online population that have conducted activity via mobile in P12M	Proportion of those who have conducted this activity who have actually spent money	Mean average annual spend, of those people that claim to have spent money
Purchase tickets online for artistic/cultural events	1%	87%	£73 (typically £1-50)
View/listen to clip of recorded arts performance/exhibition	3%	59%	£27 (typically £1-20)
View/listen to entire recorded arts performance/exhibition	2%	68%	£41 (typically £1-10)
Download creative software/ tools/apps	2%	58%	£71 (typically £1-10)
Create art online	2%	54%	£25 (typically £1-10)

Base: English online population (n=2000)/Those who have participated in activity/Those who have actually spent money (varies for each activity)

5.6 Appeal of key online applications and functionality

The figures in exhibit 12 indicate which online features were regarded as most relevant to each art form. There is a caveat: it can be difficult for the uninitiated audience member to fully understand or imagine the benefits of a feature they have not seen, experienced or, perhaps, even heard of before.

[37] comScore US Online Video Rankings, 2010

Exhibit 12: Interest in key online functions for each genre, among those interested in that genre[38]

% of the population interested in this form of arts and culture:	Music	Museums	Theatre	Libraries	Dance	Literature	Visual arts	Archives
	77%	56%	45%	39%	28%	26%	22%	18%
Base size for remaining rows:	n=1536	n=1115	n=898	n=782	n=550	n=510	n=434	n=356
Viewing 5 min clip of a performance	39%	-	35%	-	41%	31%	47%	-
Viewing an entire recording of a performance	37%	-	32%	-	31%	29%	39%	-
Viewing a live performance as it happens	38%	-	30%	-	33%	24%	38%	-
Learning about an exhibition / object/what is available	-	69%	-	74%	-	-	-	59%
Taking a virtual tour e.g. round the exhibits/backstage etc	32%	56%	38%	33%	32%	30%	44%	47%
Learning about performance / learning how to do something (per clip/20 min lesson)	30%	34%	34%	-	40%	33%	42%	48%
Phone apps to provide you with location based info	16%	13%	14%	-	11%	11%	18%	9%
Subscribing to a regular service e.g. download exclusive performances (1 hr a month)	9%	9%	9%	-	10%	11%	11%	13%

Base: Those interested in each type of art or culture (n=variable and listed at each column heading).
Notes: Darker shaded figures indicate the forms of art or culture with relatively high levels of interest for each type of online function.
A blank cell indicates that the feature was not tested for that genre.

Taking each genre in turn:

Music: Viewing recorded or live musical performances online are crucial, whilst interactive features such as music lessons and back-stage tours also perform well. Phone apps generate a relatively high interest, presumably because many musical performances are sufficiently accessible and affordable that it would be possible for people to make a relatively spontaneous decision to visit something close by.

Museums: Over two thirds of those who are interested in museums said that they would be interested in learning more online about an exhibition or object, whilst over half were interested in a virtual tour.

Theatre: Virtual tours generate the most interest, chiefly in order to improve understanding of what goes on behind the scenes. Over a third of those interested in theatre said that 'Viewing a five minute clip of a performance' and 'learning more about a performance or learning how to do something' was of interest.

Libraries: Three quarters of those with an interest in libraries would like to be able to learn more online about what is available at the library (e.g. exhibitions, literary events, music etc), whilst one third were interested in the possibility of virtual tours (e.g. round the library). Additionally, there is clear demand for libraries to provide both live and digital literature-based opportunities.

Dance: Dance fans responded positively towards the opportunity to view dance clips and performances online (especially clips, with 41% of the potential dance audience interested). 'Learning more about a performance or learning how to do something' with respect to dance is also attractive (40%).

[38] Question was 'We are now going to provide a few examples of the how the arts and digital technology do or could work together. Please highlight which of the following you would be interested in …for music… for theatre… ' etc (repeated for each artform the respondent is interested in)

Literature: Those with an interest in literature and literary performances are less sure about the relevance of the suggested online features, even though this audience is highly engaged with arts and culture online. The features generating most interest levels were ‘learning more about a performance or learning how to do something’ and ‘viewing a five minute clip of a performance’.

Visual arts: The audience for visual arts exhibits the highest levels of interest in the suggested online functions. The most appealing new online feature within visual arts is ‘watching a five minute clip’ and very high interest levels are also seen for ‘learning more about a performance or learning how to do something’ and ‘taking a virtual tour’.

Archives: This audience has the highest interest level for ‘learning how to do something’ (presumably relating to how best to use an archive’s content and services) and ‘subscribing to a regular service’, and a relatively high interest in ‘learning more about an exhibition or object’.

6 Understanding motivations and barriers to online engagement with arts and culture

Key findings from this section:

- People's interaction with arts and cultural content in digital environments can be classified into five main categories: access, learn, experience, share and create
- 'Access' covers a range of activities centred on the discovery of new information, filtering (i.e. making decisions about what appeals) and planning which arts and cultural events or activities to engage in
- The other four categories of activity – learn, experience, share, create – tend to be less common but reflect deeper (and therefore potentially more valuable) levels of engagement than the 'access' areas of activity and require increasingly sophisticated online skills
- 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'
- Experiencing arts and culture through live (offline) engagement remains the aspiration and online experiences are clearly 'second best' or 'back-up'
- However, online interaction does offer exciting opportunities to share content, experiences and opinions (primarily through social media)
- There is a broad expectation that online content will be free, but some willingness to pay for content perceived as high value and exclusive

6.1 Introduction

This chapter explores the drivers of people's engagement with the arts online and the barriers to further engagement. It provides arts and cultural organisations with a framework for thinking about the experiences, content and functionality they should offer in order to better meet their audience's needs.

6.2 A framework of the benefits that may be enjoyed from online engagement

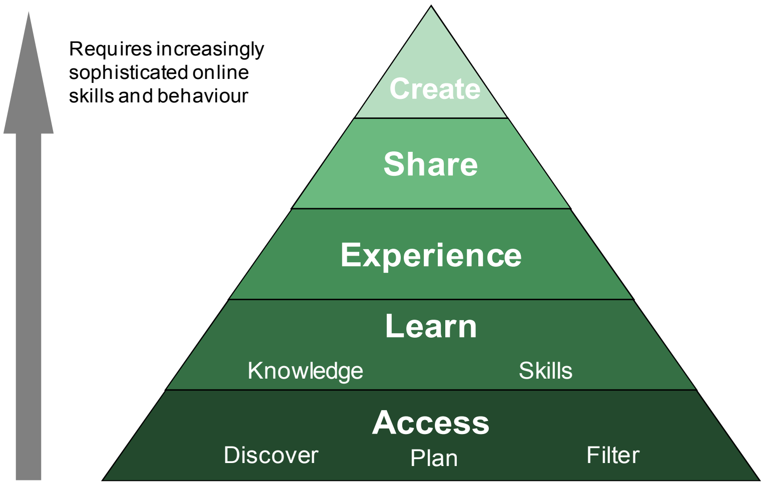
People's interaction with arts and cultural content in digital environments can be classified into five main categories:[39]

1. **Access** covers a range of activities centred around discovering what's on, filtering opportunities and planning attendance or participation (for example, purchasing tickets, arranging to meet friends)
2. **Learn** refers to a range of activities with an educational purpose – for example, finding out more about the life of an artist or improving creative skills (through an online dancing tutorial)
3. **Experience** refers to an activity where the user is experiencing the full creative or artistic work online. This is distinct from viewing a clip as part of the 'access' process as the individual has chosen to take the experience itself online
4. **Share** refers to the use of digital media to share content, experiences and opinions
5. **Create** involves the use of the internet to assist with the creative process itself.

[39] The framework builds on earlier qualitative research: *Consuming digital arts: understanding of and engagement with arts in the digital arena amongst the general public*, Synovate, 2009. London: Arts Council England)

These activities can be mapped in terms of the proportion of people who engage in them and the depth of engagement that they represent, with access at the bottom of the pyramid and create at the top. The top levels in the pyramid tend to require more sophisticated internet skills, behaviour and equipment.

Exhibit 13: Benefits classification framework for online engagement with arts and culture



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

6.3 Understanding access activities

6.3.1 Using the internet to discover information

The internet is now one of the main channels for discovering information about arts and cultural events and organisations – for many it is ***the*** primary channel.

At a high level discovering information can be divided into two categories: active and passive (effectively the inverse to push and pull marketing).

People actively set out to discover information through a range of tools:

- **Search engines:** the dominant means of active discovery, even across older age groups:

  'I was surprised at how easy it was to Google "theatres in local area". If I hadn't gone online, I wouldn't have found out those were on' 45-65 year old

- **Known websites:** some respondents described bookmarking their favourite arts or cultural sites and visiting them regularly for up-to-date information (examples included Guardian, BBC, Tate Online, Time Out London, Days Out Guide)

- **Phone apps:** the Time Out London iPhone app, which enables users to identify places of cultural interest to visit within a set radius, was used by some focus group attendees and had strong appeal

Passive consumption of information directed at the audience tends to involve offline marketing or emails:

- **E-marketing:** most respondents in the qualitative phase described receiving emails from either arts or cultural organisations, or ticket agencies that covered arts or cultural events. There is a general willingness to subscribe to emails from known organisations provided the information is relevant and the frequency is appropriate.

Social networking sites can enable both active and passive discovery of arts and cultural information. For example:

- **Facebook:** users come across arts and cultural information in status updates, comments and messages, but also actively join groups in order to keep up-to-date (although there is a considerable resistance among Facebook users to being too heavily 'marketed to')

- **Twitter:** qualitative respondents described this as an acceptable platform for brand-led marketing messages as well as enabling them to take recommendations from the tweets of people they are following
- **Following links from social networking sites** is now second only to Google as a route to new arts and cultural websites for young adults (see section 5.3).

6.3.2 Filtering and planning

Respondents in both the quantitative and qualitative stages described a process of reviewing and filtering information about arts and cultural events/content, in order to 'get a feel for something' that they might have wanted to attend live or might want to attend in the future.

Nearly one fifth of survey respondents had watched or listened to a clip of an arts or cultural performance/exhibition in the past 12 months. In the main, the reasons they gave for watching a clip map to the filtering and planning activities:[40]

- 61% to get a feel for something you haven't got time to see/haven't got a ticket for
- 52% to keep up to date with what's out there
- 51% to check out something you're thinking of going to
- 39% to revisit something you went to.

One focus group attendee described the process of viewing a clip to support decision making as follows:

> *'If you're thinking about going to see a play like Warhorse, or even going to a gallery it's good to get a taster of what it would be like…just like watching a trailer to decide if you want to watch a film'*
> *25-44 year old*

Other content that can play a key role in the filtering and planning process includes:

- **Synopses** that provide clear and compelling summaries of what the event or experience will offer
- **Audience reviews and ratings** create both interest and credibility. There was much discussion of popular websites from other sectors, such as Tripadvisor, IMDB or Rotten Tomatoes, where audience views online are seen as useful evidence to support decision-making
- **Virtual tours:** in order to get a sense of what the live experience would be like
- **Evidence of value for money:** Cost is a major influence on decision making, so pricing information is a vital component of online content. Some people look for discounts or offers, which can clearly be influential when deciding whether to attend an event.

6.3.3 The importance of trusted brands

In the quantitative research 20% agreed with the statement 'I don't know where to go online to find out about arts and cultural experiences'. Qualitative exploration of the issue suggests that many people lack the confidence in their artistic knowledge and tastes to navigate their way through the bewildering array of brands and choices available online.

Search engines are a typical starting point for all types of query, from searches for a given artist or organisation through to a more generic "what's on Friday night" search. However, search engines will naturally produce the most popular sites in their search results:

> *'It's always the top 10 theatre shows… if you want to step a level above the mainstream and find good arts, there's nowhere to go' 25-44 year old*

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[40] Combined data from those who have viewed/listened to online clips using a computer, and using a mobile phone

As a result, respondents emphasised the importance of trusted national cultural brands such as the British Museum and the National Trust, as well as trusted regional cultural brands, in helping them navigate the online space. This is particularly important for older audience members who tend to have serious concerns about online security.

In addition, aggregator and listings websites offered by trusted brands were cited as a key tool in discovering and filtering information. Around half (54%) agree that they 'prefer to use websites that have information from a range of sources and about a range of organisations'. Focus group respondents described using (and often bookmarking) a range of sites that offer credible advice on arts and cultural events, including national cross-platform brands such as Time Out and Guardian.co.uk and predominantly online brands such as Lastminute.com. Regional sites, including regional newspapers and sites such as View London, were also regularly cited.

These sites are particularly important in helping people find events or organisations that are a little off the beaten track, so are key partners and tools for smaller and medium-sized organisations.

Qualitative research respondents also welcomed email newsletters from aggregator sites – providing they were well written and relevant – as an alternative to receiving newsletters from multiple providers.

However, whilst aggregator sites are used extensively for discovering arts and cultural information, there was a clear consensus that many have shortcomings. In particular, many are not arts and cultural specialists and are also seen as too mainstream. The few that do exist specifically for the sector were not known to the qualitative research participants:

> *'I get emails from Ticketmaster every day but they don't advertise museums and exhibitions' 18-24 year old*

In addition, the existing sites are not perceived as delivering customisable, relevant and comprehensive information. The 'ideal' aggregator is one that can be trusted to conduct some of the filtering 'behind the scenes' based on user input in the customisation stage and ongoing profiling through analysis of user behaviour. Amazon and iTunes were cited as examples of trusted aggregators that provide genuinely useful recommendations based on content that the user has already indicated they enjoy.

6.4 Understanding learning activities

6.4.1 Increasing knowledge

Respondents report regularly using online content to increase their knowledge of their subjects of interest, hence heightening their enjoyment and deepening their engagement. Learning is the area where the most people can see the appeal in the online features that were suggested to them in the quantitative survey (see exhibit 12).

Learning activities are often closely allied to attending a live experience of some kind, for example:

- Finding out about artists, performers, composers, authors:

  > *'Before I go to the Alan Ayckbourn theatre in Scarborough, I like to read up on the actors and what they've done before and why they have been pulled into the project' 45-64 year old*

- Finding out about the historical or cultural context in which the artwork was created
- Investigating the story or reading the music
- Reading critiques, reviews and interpretations to understand informed opinion of the artwork
- Understanding the contents or layout of the exhibition or archive:

  > *'When you get a mailshot about an exhibition, you can go online to find out more about what it includes' 45-64 year old*
  >
  > *'I looked at the website for the Van Gogh museum in Amsterdam, before I went, because I knew I'd only have a few hours there and so I got the best out of the trip' 45-64 year old*

More highly educated individuals were more likely to appreciate the value in further learning online.

6.4.2 Improving artistic and creative skills

Of the English online population, 15% have already used the internet to 'improve creative skills' in the past 12 months (see exhibit 8) and there is considerable audience interest in online features that help with 'learning how to do something' (exhibit 12).

The qualitative respondents assumed that online tutorials (usually by video) are the most effective tool for improving skills. Examples of successful tutorials cited by respondents included how to take a good photo, five tips on how to buy antiques, opera for beginners and five things to look for when viewing Renaissance art.

Examples of dance tutorials on the Strictly Come Dancing website appealed to respondents and was identified as a good example of effective arts and culture crossover with a mainstream brand:

> *'It makes it more accessible I think, because it's a programme you know and everyone watches it' 18-24 year old*

Audience opinions were that online tutorials have great potential to engage and provide value, but they need to be produced to a very high standard:

> *'If they're done well they can be really good, but there's so many of them already and a lot are rubbish' 25-44 year old*

Some suggestions emerged during the qualitative research for successful online tutorials:

- From a recognised brand, or presented by a well-known personality
- Concise and clear
- High-quality production
- Tailored to the viewer's existing skills level
- Offering scope to progress skills
- Easy to find by searching and easy to access.

6.5 Experiencing the full creative or artistic work online

Exhibit 8 showed that 8% had watched/listened to a recording of a full arts performance/exhibition online. The top reasons given for viewing/listening to online recordings of full performances or exhibitions show that they tend to be used as an alternative route to enjoying arts and culture if the barriers to attending a live experience are too great, as seen in the estimates below (based on the 162 people who have viewed or listened to a full performance online on their computer in the past 12 months):

- 42% because the tickets cost too much
- 40% because you couldn't get tickets
- 38% because you didn't have time to go to a live event
- 30% because you were unable to get to the venue
- 15% I attended the live event as well
- 14% because the online experience would offer more than the live experience.

This is supported by the 44% who agreed that digital technology 'makes it easier for me to access arts and cultural events that I wouldn't be able to get to otherwise' (from exhibit 7).

In the minority of cases where it was felt that the online experience would offer more than the live experience, the reasons given include having an improved view of the action, the opportunity to see behind the scenes or extra content and when the content/experience itself was made for online (i.e., some forms of digital art).

The qualitative research largely confirmed the survey findings and added extra colour, with respondents saying they would consider viewing a performance online in the following circumstances:

- If the performance is streamed live, when there would have been no opportunity to attend live
- If the performance is an exclusive one, that would have been unavailable any other way
- If the live event tickets are sold out or very expensive, as it is assumed that an online experience would be priced more cheaply
- As an experiment, to gain confidence in the type of art or culture or in using the technology:

  'If it was a concert that you really wanted to see, but it had sold out and you could watch it live online, that would be good. You could maybe read people's comments about it at the same time' 18-24 year old

Similarly, respondents said they would explore an exhibition online in a range of different circumstances:

- Revisiting after the live experience of attending, to return to favourite parts or to fill in any gaps
- As an extension of studies, especially for the younger audience members
- If the exhibition tickets are sold out or very expensive.

Exhibit 12 showed that there was considerable interest in online features that enable arts and cultural experiences online. For example, 56% of those interested in museums would be interested in taking a virtual tour (47% for those interested in archives and 44% for those interested in visual arts). An iPhone app providing a virtual tour for a museum or gallery received very strong positive reactions from qualitative research respondents, as a good example of online complementing the offline experience:

'It's like your own personal guide, that would be excellent' 25-44 year old

'It's a really nice idea…I'm unlikely to have time to find out about an exhibition before I go so this would be appealing' 18-24 year old

6.5.1 Technical barriers to experiencing arts and culture online

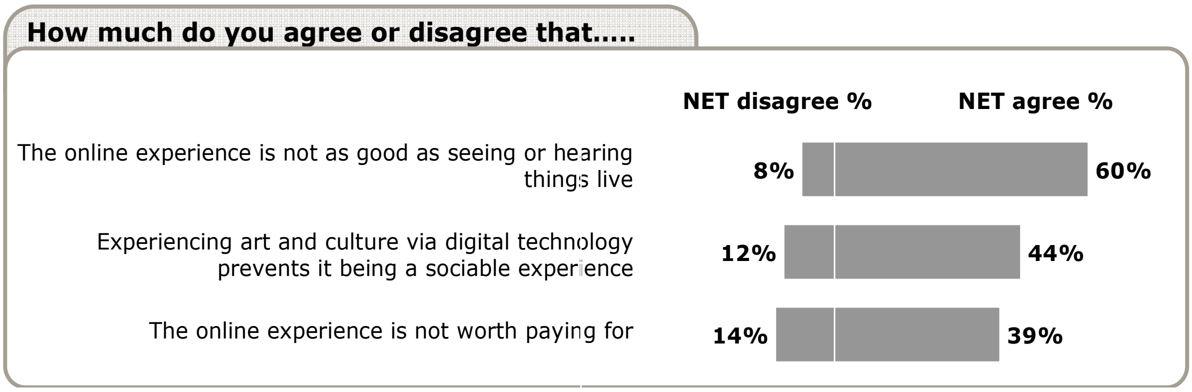
Technical capabilities are only a concern for a minority and are mainly due to perceptions that 'my internet speed or connection is not good enough …' (14% agree) or 'my kit is not good enough…' (11%)… 'to allow me to experience arts and culture online'.

Lack of clarity around illegal downloading and fear over its consequences inhibit behaviour with respect to downloading content or software. The vast majority (95%) were aware that downloading could sometimes be illegal and, of those, 42% confirmed that fear of potential legality issues would definitely stop them from downloading. Furthermore, only 40% believe that it is always clear whether or not it is illegal.

6.5.2 Quality barriers to experiencing arts and culture online

Many people feel that online experiences will be inferior to the live experience. Three fifths agree that they do not expect an online experience of arts or culture to be 'as good as seeing or hearing things live', as seen in exhibit 14.

Exhibit 14: Concerns that the online experience is a reduced one



Base: English online population (n=2000).[41]

When we explored and clarified this concern using qualitative research, the underlying drivers of this perception were that an online experience will not:

- Be as sociable as attending an event with friends: *'You lose the social side of enjoying a show or exhibition with someone else' 25-44 year old*
- Be 'the real thing' and have the same kudos attached: *'It's about the quality of the experience - why would you sit at a laptop by yourself when you can go to the actual gallery?' 18-24 year old*
- Provide the same atmosphere and sense of immersion
- Provide the same sense of anticipation in the run-up to the event.

Positioning online experiences as distinct from the live offer could help to manage audience expectations by ensuring that the two are seen as complementary rather than substitutive. The success of online gaming also provides pointers for arts and cultural organisations seeking immersive and participative ways of engaging their audiences.

6.6 Understanding sharing activities

Many people report that they are perfectly happy enjoying an arts activity on their own (for example, reading or listening to music). Others regard the sociable aspects of arts and cultural activities as a key benefit, and perceive online arts experiences as suffering in comparison to live experiences because they are fundamentally less sociable. It is important to recognise that this varies both by individual and by art form and by experience.

A significant 62% agree that digital technology 'makes it easier for me to share experiences with friends and family'. There are significant differences in behaviour by age group: the 16-34 year old group are more likely to enjoy 'sharing interesting content with friends' (from 45% overall, up to 66% of this age group), and to enjoy group activities.[42] These preferences are typical of the pre-family lifestage when social lives tend to be a high priority.

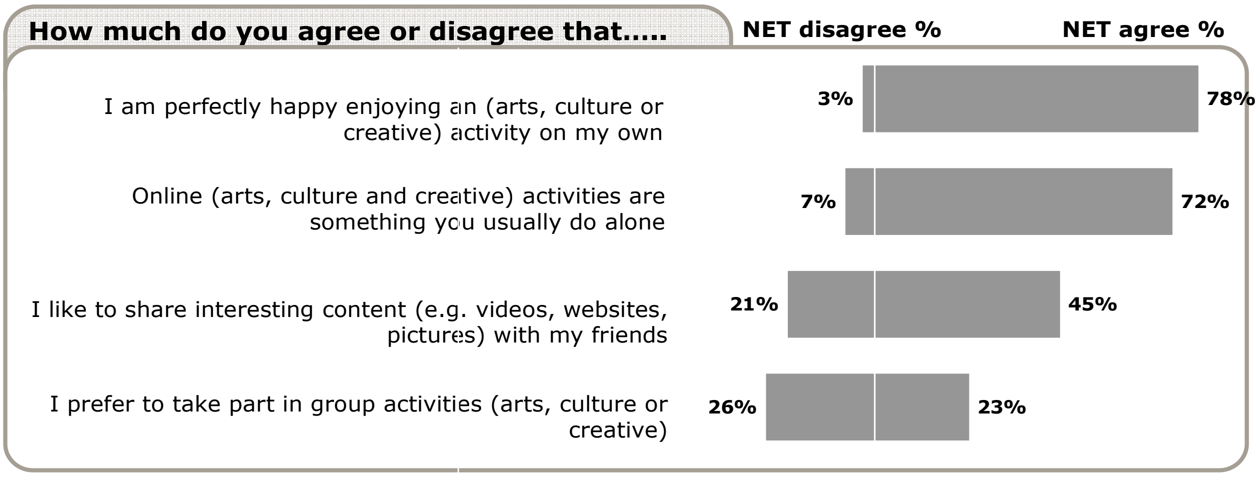
Respondents report a wide range of activities relating to the sharing of views, opinions, ideas, tips and content:

> *'Say you went to the Saatchi gallery and really liked it, you might send a link (of an online video clip) to someone else' 18-24 year old*

[41] Note: figures are a 'net' of the top two and bottom two boxes from a five point scale. Middle box 'Neither agree not disagree' is not shown: hence, figures in the exhibit do not add to 100%
[42] Statistically significant differences (at 95% confidence level)

People share information online about arts and culture in a range of different ways: for example, of those that have publicised something related to arts and culture (n=99), 63% had used social networking sites, 49% had used email and 44% had done so through a website (for example, a blog or forum).

Exhibit 15: Opinions on experiencing arts and culture alone versus in groups



Base: English online population (n=2000)[43]

The qualitative research reinforced the view that for the younger 'Facebook' generation, sharing content, opinions and ideas online was as much a part of day to day life now as making a phone call. Whilst people reported examples of successful online initiatives that draw on the power of social media (such as the One Book, One Twitter global book club launched in May 2010), the general sense was that the sector had a long way to go to tap into people's desire for sociability, atmosphere and immersion by creating 'sociable' online experiences that encourage user interaction.

6.7 Use of the internet to assist with the creative process

Online creation of artistic content is a relatively niche area of activity: 6% of people claimed to have created something online in the past 12 months (from exhibit 8), and 7% have uploaded something creative/artistic that they created themselves (e.g. 'music or animation you created yourself, photos you took as an artistic activity').

Base sizes were too small for detailed analysis, but it seems that much of this activity relates to music, although theatre, dance, visual arts, creative writing, and reviews are also mentioned. Respondents claim to use mobile phones to make music, to take photos and create animation. Computers are used to make music, to research, for graphic design and for website design. People's interpretation of 'creating online' clearly includes the use of the internet in any form that supports the creative process.

There were a small number of qualitative research respondents with personal experience in this area, mostly around the use of the internet to broadcast or share their creative endeavours:

> *'I've created short films and then uploaded them on YouTube' 18-24 year old*

As the means to create and broadcast have become democratised through digital media, increasingly, audiences expect to able to create and edit content themselves with 35% agreeing that 'digital technology makes it easier for me to make something creative' (from exhibit 7). There was considerable interest in 'easy to use' software enabling the creation of photo galleries, movies and music, for example:

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[43] Note: figures are a 'net' of the top two and bottom two boxes from a five point scale. Middle box 'Neither agree not disagree' is not shown: hence, figures in the exhibit do not add to 100%

'If you could have something like Photoshop as an app on your iPhone that would be very interesting' 25-44 year old

Of the 6% that had downloaded creative software or apps in the past 12 months (see exhibit 8), Adobe Photoshop was the top mentioned, followed by 'music-related tools' and other photo tools or drawing tools.

At present however, awareness of or accessibility to creative options are limiting factors.

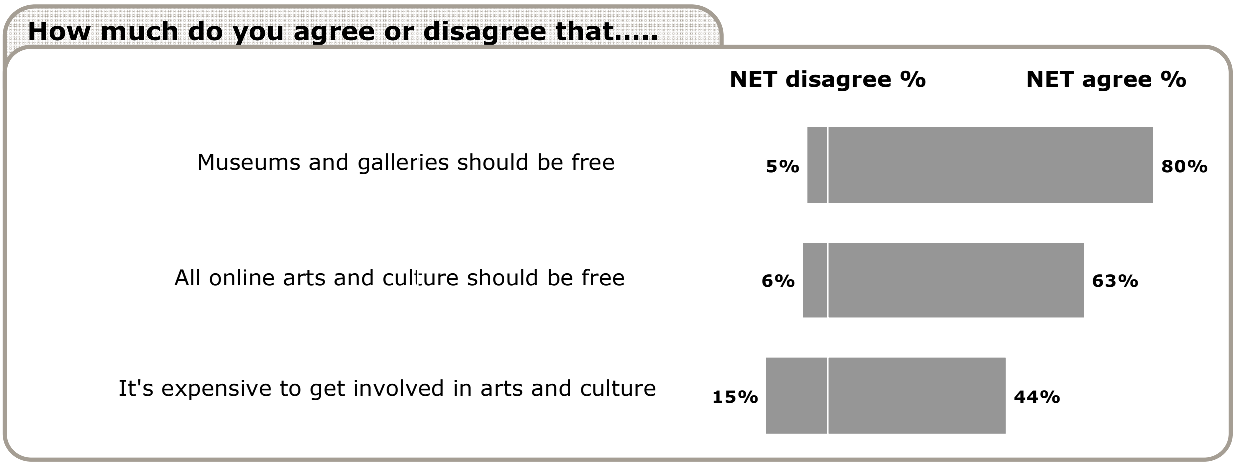
6.8 Willingness to pay

6.8.1 Paid content

The majority of people believe that all online content should be free (net 63% agree), although that view is not quite so widespread as the opinion that physical attendance at museums and galleries should be free (net 80% agree).

Interestingly, it is the over 55 year olds who are significantly more likely to believe that museums and galleries should be free to attend (87%) and the under 34 year olds believe online content should be free (67%), perhaps reflecting the respective past experiences of these two age groups.[44]

Exhibit 16: Opinions on pricing of arts and cultural content



Base: English online population (n=2000)[45]

Despite this, people say they are willing to pay for online content that:

- Offers something extra: tutorials, smartphone apps (e.g. virtual tour guides), sharing one's own creative work online, especially where there is a potential reward of some kind, such as Shootexperience.com:

  'Something good that you can't get elsewhere' 25-44 year old

- Is extremely high value or exclusive: live (versus recorded) video content, expensive or sold out performances, events with a lot of 'buzz' or marketing around them:

  'If you're really into something, you'll pay for it' 25-44 year old

Among the qualitative research respondents, there was some interest in paid-for subscription models relating to information and ticketing if this could provide a consistent 'premium customer' service, such as: priority ticket purchasing to popular events, regular discounts and special offers or exclusive content such as

[44] Statistically significant differences (at 95% confidence level)
[45] Note: figures are a 'net' of the top two and bottom two boxes from a five point scale. Middle box 'Neither agree not disagree' is not shown: hence, figures in the exhibit do not add to 100%

artist interviews or performances. Based on the quantitative results seen in exhibit 17, additional online content should form part of those offers, to maximise their appeal.[46]

6.8.2 Price points

The quantitative research also collected respondent perceptions of what 'fair prices' might be for each genre (shown in exhibit 18 below). This data should not be treated as a reliable indicator of consumer behaviour: in general there are low levels of willingness to pay and it can be difficult for consumers to name a price for something of which they have little experience. Charging prices such as these might not actually result in very high levels of take-up.[47]

Exhibit 17: Perceptions of 'fair prices' for specific online functions, by genre[48]

	Music	Museums	Theatre	Archives	Dance	Literature	Visual arts
Base size for each column:	n=1536	n=1115	n=898	n=356	n=550	n=510	n=434
Viewing 5 min clip of a performance	£3.70	-	£4.12	-	£4.76	£3.64	£3.94
Viewing an entire recording of a performance	£7.40	-	£7.89	-	£7.32	£6.65	£6.94
Viewing a live performance as it happens	£7.11	-	£7.57	-	£7.17	£6.58	£6.57
Learning about an exhibition /object/what is available	-	£3.90	-	£3.65	-	-	-
Taking a virtual tour e.g. round the exhibits/backstage etc	£4.33	£4.47	£4.77	£3.87	£5.12	£4.06	£4.29
Learning about a performance/ learning how to do something (per clip or 20 min lesson)	£5.92	£4.92	£6.20	£4.69	£6.47	£5.36	£6.07
Phone apps to provide you with location based info	£3.85	£3.48	£4.01	£3.04	£4.42	£3.41	£4.02
Subscribing to a regular service e.g. to download exclusive performances (1 hr a month)	£5.67	£4.49	£5.88	£4.68	£5.80	£5.25	£5.40

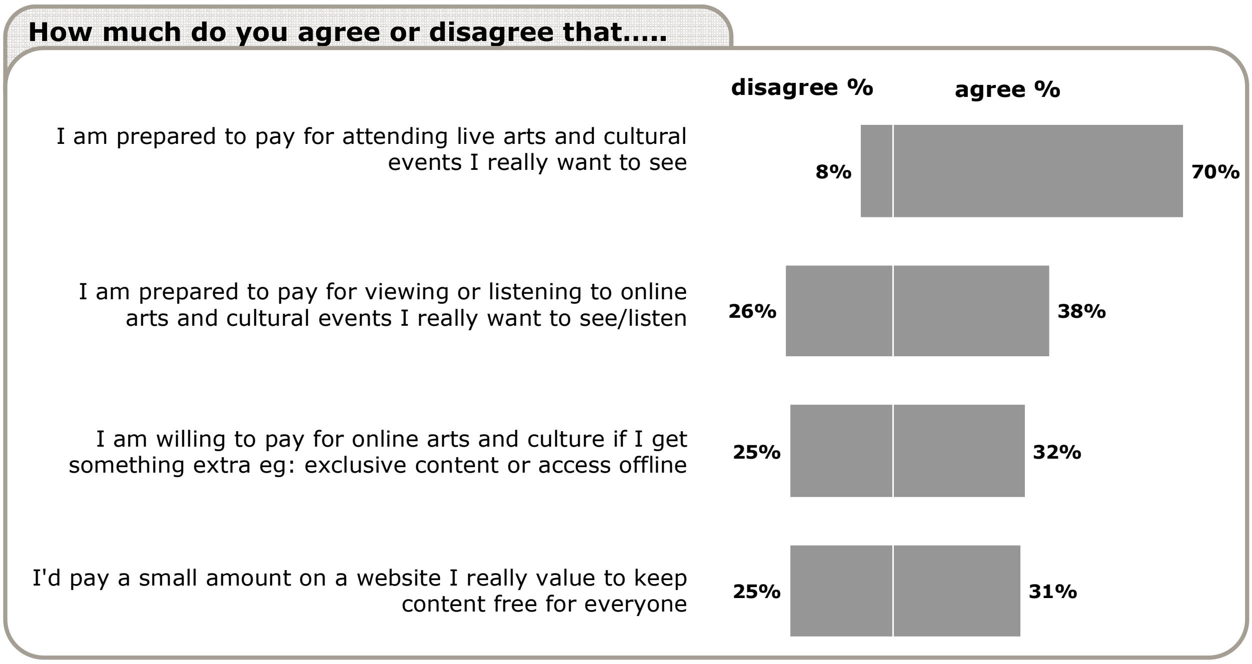
Base: Those interested in each type of art or culture (n=variable and listed at each column heading).
Note: Darker shaded cells indicate the genres with relatively high prices for each type of online function.

6.8.3 Philanthropy

The survey tested people's attitudes to philanthropy and donating online in order to see what other income and fundraising opportunities there may exist online for the cultural sector. There was a minority who claimed they were willing to pay to keep experiences accessible for others. . There is potential to make other philanthropic asks compelling online, but they were not investigated during this survey.

[46] For examples of this type of model, see Liverpool Philharmonic Hall priority booking scheme and British Museum membership
[47] It would always be recommended to conduct further pricing research on specific propositions with the relevant target audience, prior to launching a paid-for online content or service innovation
[48] unless otherwise indicated (eg 'subscribing to…'), prices would be for a single experience/purchase

Exhibit 18: Willingness to pay for arts and cultural content



Base: English online population (n=2000)[49]

[49] Note: figures are a 'net' of the top two and bottom two boxes from a five point scale. Middle box 'Neither agree not disagree' is not shown: hence, figures in the exhibit do not add to 100%

7 Segmenting the digital audience for arts and culture

Key findings from this section:

- 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.
- There were also two segments that should not be seen as priorities: because they have only low levels of interest in arts and culture, and digital technology does not offer a route to increase their engagement.
- This segmentation exercise has highlighted that an interest in arts and culture tends to go hand-in-hand with an interest in digital technology:
  - Digital technology should be seen primarily as a means to reach out to those who are already culturally aware
  - There is no evidence that digital technology in and of itself offers a way to engage people with little or no current interest in arts and culture.

7.1 Introduction to the segmentation

Segmentation is a marketing technique that allocates individual audience members into groups such that all members within a segment are homogeneous, but each segment is distinct. Subsequently, marketing strategies can be tailored to each segment's needs.

This project has employed an attitudinal segmentation that has resulted in five large segments of people. People were grouped according to their answers to a series of questions about their attitudes to arts and culture and digital technology (see exhibit 29 for details of these questions). Demographic and behavioural variables were not used to create the segments but, as one would expect, the segments vary in their demographic and behavioural profiles.

The segments identified in this study could also be characterised as online 'user types'. This perspective reflects their usefulness for developing online content and marketing strategy: arts and cultural organisations can use this Digital Audiences segmentation as a way of understanding how best to use the internet to encourage greater engagement with arts and culture, and these segments or 'user types' can sit alongside the existing segmentation of arts audiences.[50]

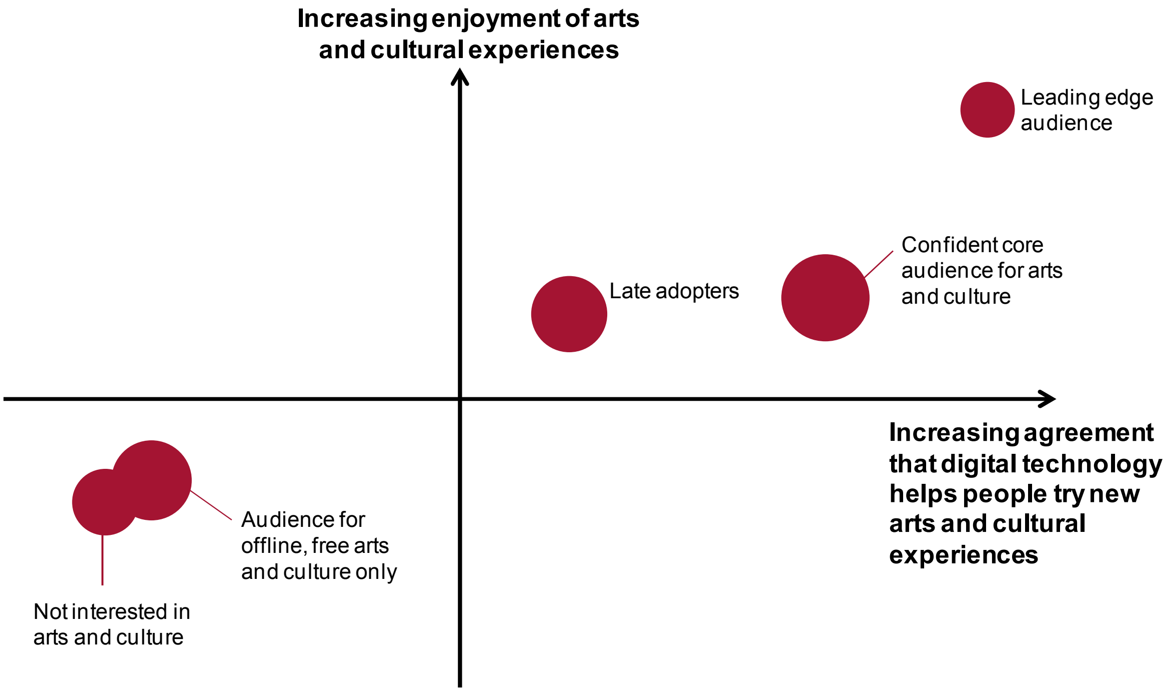
[50] Information on this can be found at www.artscouncil.org.uk/audienceinsight/

7.2 The relationship between interest in arts and culture, and use of the internet

One important finding from this project has been that, broadly speaking, these two dimensions are strongly correlated: the people who are most engaged in arts and culture are also the people who are most advanced in their use of the internet (and other digital technology), and vice versa.

The following two exhibits illustrate this point, by mapping the relative position of the five segments along two dimensions: in each exhibit, the vertical axis refers to increasing engagement with arts and culture, and the horizontal axis refers to increasing engagement with the internet (and other digital technology).

Exhibit 19: Mapping the five segments in terms of attitudinal engagement



Note: This map uses just two examples of the attitudinal questions that have defined these different audience segments, although in fact there were 12 factors developed from 52 questions (see Appendix 9.3).

7.2.1 Prioritising the most relevant segments

The above exhibit shows three segments (top right quadrant) who are both:

- Highly interested in arts and culture, and important audience members... and...
- Highly enthusiastic about how the internet (and other digital technology) can facilitate access to, and enjoyment of, arts and culture.

These three segments represent a majority of the current audience for arts and cultural organisations and offer the greatest potential for development of future audience volumes and for strengthened relationships with arts and cultural organisations via online engagement. They are the segments of most immediate relevance to cultural organisations wishing to strengthen their online offer and should be the focus for digital marketing efforts.

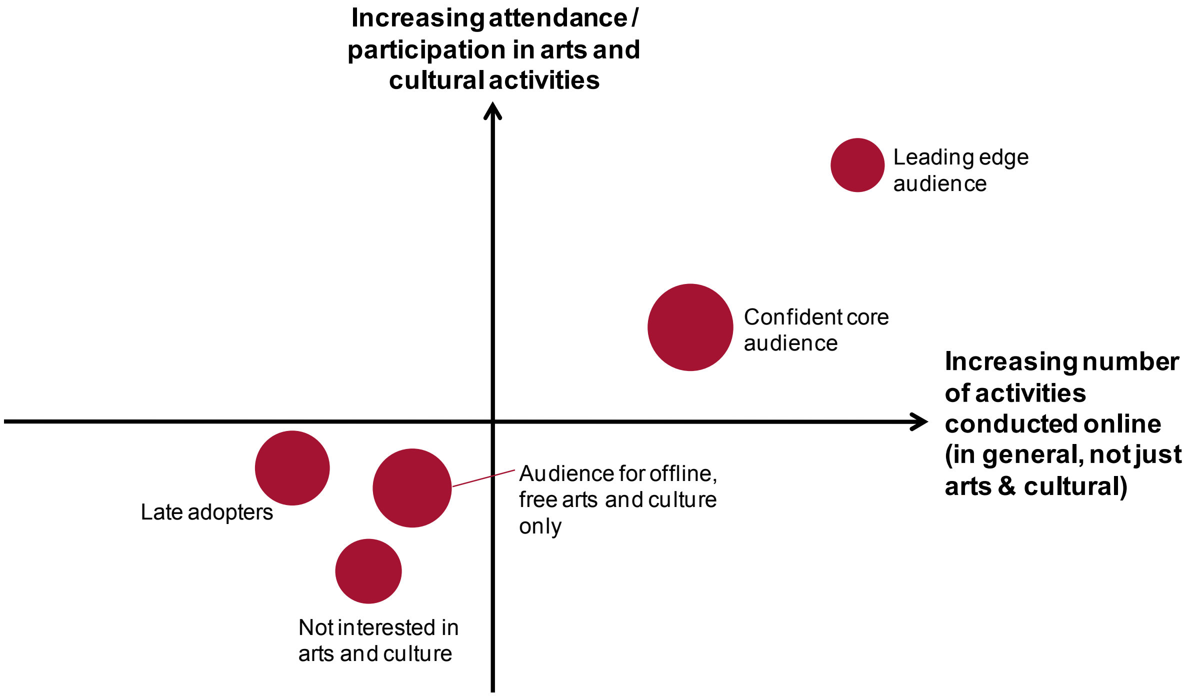
The two segments in the lower left quadrant (Audience for offline, free arts and culture only and Not interested in arts and culture) are not likely to be engaged further in arts and culture through online marketing and content. This is evidenced by a range of measures from the quantitative survey. For example, they do not tend to agree that digital technology can help people try new arts and cultural experiences.

7.2.2 The difference between behaviour and attitudes

It is important to note that one of the three priority segments is not as actively engaged, in terms of current behaviour, as the other two. Late adopters were seen to be similar in their attitudes to the Leading edge and the Confident core audience, (as in the previous exhibit) but tend to lag behind in their current behaviour. For a visual illustration of this point, please compare their position in exhibit 19 with that in exhibit 20.

Compared to the Leading edge and the Confident core audience, Late adopters are limited in the type of online activities they currently perform, reflecting a lower confidence with the internet and with technology generally. They also do not have as many arts and cultural interests, and attend events and participate in activities less frequently. However they remain an important audience segment for many arts and cultural organizations and are relevant to online marketing strategies as they are receptive to marketing messages online if properly targeted.

Exhibit 20: Mapping the five segments in terms of current behaviour



Note: The axes use a scale of the number of different types of activity engaged in (see Appendix 9.3)

7.3 Comparison of Digital Audience segments

The next exhibits aim to provide a brief overview of the key defining characteristics for each of the segments. Data tables supporting these points are available in Appendix 9.3.

Exhibit 21: Profiling based on arts and cultural interests and demographics

Audience segment:	Characteristics:
Leading edge (11%)	• Passionate about arts and culture and likely to be advocates for the sector • Actively participate in arts and cultural activities and in generating new arts content • High levels of attendance at live events, across the widest range of genres • Heavy skew towards the young (typical age is 16 – 34); also more likely to be male, well educated or still studying, and living in a shared house
Confident core (29%)	• Mainstream arts and cultural audiences and the highest spenders on arts and culture • High levels of attendance at live events; the segment most likely to attend museums, galleries, public art displays or installations, and live rock / indie / pop music • Typically aged 16 – 44 years old, with a slight skew towards males, and likely to be of above average education levels and social grade (ABC1)
Late adopters (21%)	• Important audience members for some arts and cultural organisations • Most likely to visit libraries and attend theatre performances other than plays (such as musicals/shows) • Average levels of attendance at most types of events, although they are not likely to participate in arts and cultural activities themselves (the exceptions being reading and crafts) • Older than average (mostly 45+), with a female skew; nearly one quarter are retired and most are married
Low cost, offline arts and culture only (23%)	• Attend libraries, museums and galleries (average levels), but have few other arts and cultural interests or aspirations • Unwilling to pay for arts and culture • Many have not attended any arts and cultural events, or participated in any activities, in the past 12 months • Often single or older people with moderate financial means
Not interested in arts and culture (16%)	• Lowest levels of arts and cultural interests; indeed, few leisure interests generally • Two fifths of this segment have not attended any arts and cultural events, or participated in any activities, in the past 12 months • Lowest household income and education levels

Note: Percentages refer to each segment's portion of the English online population

Exhibit 22: Profiling based on use of the internet and digital technology

Audience segment:	Characteristics:
Leading edge (11%)	• Technophiles displaying 'early adopter' behaviour and high ownership of latest technology • Use internet as their primary platform for communication, information and entertainment • Nearly one quarter use mobile internet daily • Highest use of social networking (lowest use of email): regularly share their plans, views and information on arts and cultural activities • Engage with rich media online: avid computer gamers, regular users of online TV and radio • Typically source arts and cultural content for free (e.g. YouTube, Spotify) • Online behaviours include sharing and creation of arts and cultural content
Confident core (29%)	• Mainstream internet users who are confident with a range of activities online • Use the internet for access to arts and culture (discovery, filtering, planning and ticketing) and to learn about it • Have good quality computer / internet set-up, that supports rich media experiences • Many are daily social networkers, but less likely than the Leading edge to be openly sharing either arts and cultural content or opinions
Late adopters (21%)	• Lowest confidence using the internet and mobile phones, and feel left behind by new technology • Use internet for information searching, emailing and some purchasing, such as tickets: for arts and culture as well as other areas such as holidays • Would engage more with arts and culture online if they felt more confident; welcome technical support / tutorials • Major concerns around security of personal details, and viruses: tend to stick to well-known (offline) brands' websites / emails
Low cost, offline arts and culture only (23%)	• Late adopters of digital technology and have very basic internet use • Unlike the Late adopters segment though, they do not see the benefits of digital technology in terms of increasing access to arts and culture
Not interested in arts and culture (16%)	• Poor technological capabilities (in terms of their technology ownership and platform use) and only conduct basic internet activities

Note: Percentages refer to each segment's portion of the English online population

Finally, the exhibit below provides a brief comparison of the types of online interaction and online marketing that are relevant to each segment. All have been discussed in chapter 6 in more detail. The remaining text in chapter 7 sets out the explanation of these profiles and the data to support this overview can be found in Appendix 9.4.

Exhibit 23: Relevance to each segment of various types of online interaction with arts and culture

Behaviours exhibited:	Audience segment:		
	Leading edge	Confident core	Late adopters
Online creation of arts, cultural or creative content	✓		
Downloading creative software	✓		
Uploading arts, cultural or creative content	✓		
Sharing views via social networking sites (SNS), blogs, etc.	✓		
Sharing links via SNS	✓	✓	
Discovery via SNS	✓	✓	
Online experiences via rich media	✓	✓	
Using content that supports learning outcomes	✓	✓	✓
Online ticket purchase	✓	✓	✓ (If trusted brand's website)
Using content that supports filtering process	✓	✓	✓ (less confidence with rich media)
Planning logistics	✓	✓	✓
Discovery via aggregator sites, email marketing and search engines	✓	✓	✓ (If trusted brand's website)

7.3.1 Encouraging online engagement among Confident core

This segment is mainstream and represents a large (29%) proportion of the English online population:

- **Online strategy should support the key user needs of discovery, filtering, learning, and (to a lesser extent) experience and sharing:**
  - *be discoverable through search engines and social media:* Search engine optimisation (SEO) is crucial as Google is a key tool for discovering new content. In addition, make content readily available across the key social networking sites (especially YouTube and Facebook)
  - *be in the audiences' chosen online spaces:* Have a presence in the online spaces where the Confident Core audience spends most time – including the major listings and aggregator sites mentioned elsewhere in this report, but also the major portals - rather than expecting the audience to seek them out online
  - *consider going mobile:* The Confident core audience has a high adoption of smartphones and strong interest in phone apps that provide local 'what's on' information
  - *whet appetites:* offer opportunities for sampling arts and cultural content and provide plenty of evidence to support decision-making. This user type is interested in video clips, virtual tours, podcasts and other rich media content that can give them a flavour for the live event
  - *be informative and credible:* Enthusiastic about online learning, this user type wishes to use online content to get the best out of their offline arts and cultural engagement by finding out more about artists/performers and events/exhibitions, either before or after attending
  - *encourage sociable experiences:* Interaction with friends and family is key for this user type, both online and offline. Be sure to link with Facebook, Twitter and the key social bookmarking tools. Encourage people to write user-generated content reviews

- Online ticketing is a must. There may also be some limited opportunities for revenue from **paid-for content** if it offers something of real value – the most frequently cited example was a mobile app that supported the live experience, although a few respondents also mentioned live streaming of sought-after performances.

7.3.2 Encouraging online engagement among Late adopters

- **Key differences (compared to the Confident Core audience) to bear in mind for this segment are:**
  - *trusted brands:* often extremely nervous of new sites, this segment uses well-known brands (offline household names) as their hallmark of trustworthiness and will most likely ignore search engine options or e-marketing from unfamiliar sources unless endorsed by a friend/family member or by a trusted brand
  - *aggregators:* will be used if they are trusted offline brands in their own right, but the online-only aggregators are less likely to be trusted
  - *unsolicited online contact*: this user type will ignore emails unless they already have a relationship with the provider. Yet they are very willing to enter correspondence with arts and cultural providers online, as long as they feel comfortable that the dialogue is genuine.
  - *social networking:* used very little, because of lack of trust and appeal; generally, this segment are not likely to publicly share their views, plans or their own content online
  - *user-generated content:* UGC is not a part of daily life for this segment – they prefer professional content from arts and cultural organisations
  - *online security:* reassurances around payment are required, because this user type is very anxious about making online payments or indeed entering any personal details online
  - *rich media:* this segment is much less likely to engage with audio-visual content or other sophisticated content and functionality (e.g. podcasts) due to low skills and low confidence. Make sure the basic content is easily available through text and pictures
  - *enthusiasm to improve skills:* despite their low confidence, this user type is willing to learn how to get more out of the internet, especially when it can help them further their knowledge in the areas of arts and culture they are enthusiastic about. Online tutorials or clear instructions could provide the necessary support, enabling audience members to try viewing clips or taking a virtual tour, for example.

7.3.3 Encouraging online engagement among the Leading edge

- **Key differences (compared to the Confident Core audience) to bear in mind for this segment are:**
  - *mobile internet:* The Leading edge audience regularly access the internet using their mobile phones and are likely to appreciate well designed mobile sites as well as partnerships with listings and discounts they can use via phone apps (eg, vouchercloud). Mobile internet sites are likely to be fruitful locations for links, reviews and ads
  - *immersive experiences:* This segment values immersive experiences such as online gaming and therefore is likely be more open to experimenting with more sophisticated and immersive online arts and cultural experiences – however, they will also have high standards and will be easily disappointed
  - *advocacy and social media:* The Leading edge consumer is an avid user of Facebook and other key social media. They are also passionate about their arts and cultural interests and more likely than the other segments to become an advocate, promoting and publicising events and organisations they are keen on. Arts and cultural organisations should embrace this behaviour by encouraging group attendance, using social media to promote and embedding social media into the experience itself

- *creativity:* The Leading edge are the most likely to be interested in online tools/apps/software with which to create their own artistic or creative content, so organisations that provide such opportunities, or provide inspiration for creativity, can deepen their relationsh*ip with this segment*
- *expectation of free content:* In principle, this segment places a great deal of value on arts and cultural experiences and is willing to pay for online content they really want to see, or that provides something extra. However, in practice, fulfilling these criteria is challenging against a backdrop of free user-generated or unlicensed online content and this user type does have an expectation that any content of interest will be available for free, somewhere, online. Earning revenue online will therefore be a question of providing something unique, something better, something essential, or something that's a 'first'.

8 Implications for arts and cultural organisations

8.1 Strategic implications for the sector

The internet is changing the way we consume, share and create arts content: in 2010 English people of all ages and backgrounds used the internet to view paintings and theatre performances, but also to create and post their own art, including films, music and photos.

Importantly, this engagement augments, rather than replaces, the live experience. Our segmentation clearly shows that leading edge consumers of digital technology also tend to be passionate about the arts and regular attendees at live arts and cultural events. In other words, although engaging with the arts and cultural sector through the internet is now a mainstream activity, this does not appear to be to the detriment of the live experience.

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 and fundamentally new arts experiences. Some of these are still related to a live experience – such as a Twitter book club, or a location based mobile app guiding us through an exhibition. Other experiences may be online only, such as a work of digital art or an online game.

However, this research also shows that the 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 this research suggests can yield financial returns is marketing and audience development. Arts organisations that are skilled in digital marketing – and particularly in areas such as search engine optimization and the use of social (earned) media – will see more people through their doors than ones that rely on an old-school website and the odd email newsletter. The second half of this section discusses the implications for digital marketing strategies in more detail.

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. Our 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 round of cost-cutting.

8.2 Implications for digital marketing strategies

8.2.1 Social media has become a major tool for discovering as well as sharing information about arts and culture, second only to search through Google

An effective search engine optimisation strategy has been crucial for many years now as search engines are one of the primary routes for people discovering information online.

This research confirms what many of the more forward thinking arts and cultural organisations already know – that earned media, predominantly in the form of Facebook and YouTube, has become a central component of any digital marketing strategy.

Marketing through social media sites and platforms requires a diverse array of skills, and as our research shows, is very easy to get wrong. Our respondents were extremely sensitive to being 'marketed to' through these platforms. But our more digitally savvy segments (Leading edge and Confident core) now spend significant portions of their lives on these platforms, and arts organisations are missing an opportunity if they are not there with them, listening, communicating, engaging. Each of these platforms has idiosyncrasies in terms of the content and tone that are appropriate, and also the audiences they attract, and learning how to use them is an art in itself.

8.2.2 Trusted aggregator and listings sites on mobile and fixed internet

Aggregator and listings websites play a key role in providing information on a range of arts and cultural organisations and events, helping people who may lack the knowledge and confidence in their own artistic taste to make full use of search engine results. Importantly, they come in many shapes and sizes: online marketing strategies should take care to work closely with these sites to maximise visibility and quality of information relating to their offer. Key categories of site include:

- **Leisure information/listings aggregators** such as Time Out, View London, lastminute.com, Days Out Guide, bbc.co.uk and the national and local newspapers
- **Ticketing agencies** such as Ticketmaster, See Tickets
- **Mobile phone apps** for local listings or promotions such as vouchercloud and Time Out could raise brand or event salience and encourage audiences to try a live experience. Making an organisation's **website compatible with the major phones** is advisable where the audience is Leading edge, as well as for future proofing an organisation's digital footprint
- **Finally, popular websites in other sectors** are potentially valuable places to have online advertising, reviews, or other additional content (e.g. clips); for the Late adopters this might be newspaper and travel sites, whereas for the Leading edge segment this would include iTunes and Spotify. Effective partnership marketing with brands and websites outside the cultural sector can also play an important role in helping art organisations reach audiences they might not otherwise reach

8.2.3 Three main audience segments, five main categories of interaction

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: each is clearly differentiated from the other in terms of attitudes and behaviour.

The study also reveals five main categories of interaction – access, learn, experience, share, create.

Importantly, arts and cultural organisations should be able to use these segments and five categories of activity as a framework for mapping their audiences requirements and understanding which types of content and functionality are likely to be of most value to which segments of their target audience. This, in turn, should enable them to make more informed decisions about which online content and functionality to invest in.

Key types of content that were regarded as high value by all segments included:

- Clips of performances or exhibitions are already one of the most effective sampling tools, so providing online 'tasters' of offline arts and cultural experience via audio-visual content is a valuable marketing approach and holds great audience appeal
- Virtual tours hold great appeal, although there are few on offer in the market at present
- Audience reviews and ratings; testimonials.

8.2.4 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 live events - this is also where the greatest proportion of people can see potential going forward.

This offers a clue to arts and cultural organisations when developing their online offers. By taking care to position their online experiences as different, rather than a replication of the live offer, organisations could help to manage audience expectations by ensuring that the two are seen as complementary rather than substitutive.

Organisations should consider how they might tap into audiences' desire for sociability, atmosphere and immersion by creating 'sociable' online experiences that encourage user interaction.

8.2.5 Email marketing remains a key tool for our priority segments

Email marketing remains a key channel for direct ongoing communication with all three of our audience segments. Emails from familiar providers are welcomed provided the timing and content are deemed appropriate and relevant (e.g. tailored by region, artform, price, lifestage, etc).

8.2.6 Be realistic about what you can and can't charge for

Although people regularly purchase tickets for live events online, there are relatively few examples (beyond ebooks and music) of people paying for online arts and cultural content and a low willingness to pay unless the experience offered is in high demand and not available through alternative means. Arts and cultural organisations should be cautious when making assumptions about online revenue streams unless they see compelling evidence to the contrary.

9 Appendix

9.1 About MTM London

MTM London is a specialist strategy consultancy that helps media and communications companies to build digital businesses. Its service-offering spans three core disciplines: research and insight, strategy and growth, and training and development.

MTM London has worked extensively across the media, arts and cultural sectors, helping clients to develop digital media strategies and advising on the public service content agenda. Key clients include Channel 4, Ofcom, NESTA (National Endowment for Science, Technology and the Arts), and Arts Council England.

MTM London was founded in November 2005 by Jon Watts, who had previously worked at Spectrum Strategy Consultants for six years, and Richard Ellis, who was a Director at Wheel (now LBi), the UK's leading digital agency.

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9.2 Research commissioners

This research was commissioned by Arts Council England in partnership with Arts & Business and the Museums, Libraries and Archives Council (MLA).

This research is part of the major three-year Digital Opportunities Programme by the Arts Council (one of the organisation's four priorities for 2008-2011), and develops on earlier research conducted in that programme. Building on its work in broadcasting and new media and on the creativity within arts organisations themselves, the Arts Council seeks to help the arts make the most of digital opportunities at a number of levels, including research, strategic innovation and capacity and skills-building.

From the perspective of the museums, libraries and archives sector, past research on participation has tended to focus on physical visits; this current research supports the development of the use of digital technologies to deliver improved access, information and more opportunities for participation in the sector. MLA is committed to helping museums, libraries and archives make full use of the opportunities provided by digital technologies, and ensuring that the sector is at the heart of government digital policies.

Arts & Business is also undertaking a major programme of work exploring collaborations between digital technology, culture and business. Experimenting with businesses can help cultural organisations embrace and embed digital technologies and leverage in business investment by using their digital assets, and also realise new opportunities offered by changes to philanthropy fundraising. The use of digital technology in arts and culture is therefore a key focus for Arts & Business, in order to encourage and facilitate mutually beneficial partnerships that better engage audiences and consumers alike.

The project was managed by a steering group of representatives from the research commissioners and from Ofcom and NESTA, which met at key points throughout the project's lifecycle.

9.3 Additional detail on quantitative research approach

The 'margin of error' of data collected in a research sample can be judged from look-up tables like the one below, which displays confidence limits for a range of different example percentages, from a range of example sample sizes. For example, based on a sample size of 100, an observed percentage of 20% is accurate to within + or – 8%.

Exhibit 24: Confidence limits for a percentage, from a quantitative research sample

Sample size	5% or 95%	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
50	6	9	11	13	14	14
75	5	7	10	11	11	11
100	5	6	8	9	10	10
150	4	5	7	8	8	8
200	3	5	6	7	7	7
300	3	4	5	6	6	6
500	2	3	4	5	5	5
1000	2	2	3	3	3	3

9.3.1 Sample profile

The next exhibits set out the demographic and media usage profile of the Digital Audiences research sample, in comparison to the population information that was used to set fieldwork quota targets.

The profile has also been compared to the annual quantitative research study, Taking Part, using only the subgroup of respondents with internet access at home.[51] As expected, the two samples are almost identical in profile (demographics and arts participation), which helps ensure that findings are comparable. For example, if research users are familiar with the characteristics of a certain art form's audience within Taking Part, it may be assumed that the corresponding audience within the Digital Audiences dataset is comparable. This means that the Digital Audiences research builds helpfully on Taking Part by adding a wider range of data on digital engagement to what is already known about arts and cultural audiences.

Exhibit 25: Demographic profile of Digital Audiences quantitative research sample

Demographic measure		Digital Audiences sample (weighted profile)	Taking Part sample (for comparison only)	Comparable source used to identify appropriate quota levels	
Age	16-24	16%	17%	17%	Ofcom Media Literacy Interim 2009
	25-34	22%	18%	22%	
	35-44	23%	22%	23%	
	45-54	17%	18%	17%	
	55-64	12%	14%	12%	
	65+	9%	10%	9%	

[51] Taking part: The national survey of culture, leisure and sport adult and child report 2008/09, Department for Culture, Media and Sport, 2009. London: DCMS

Demographic measure (cont.)		Digital Audiences sample (weighted profile)	Taking Part sample (for comparison only)	Comparable source used to identify appropriate quota levels	
Gender	Male	52%	51%	52%	Ofcom Technology Tracker Q4 2009
	Female	48%	49%	48%	
Region	North	26%	27%	26%	Calculated from ONS internet access households and individuals 2009 (regional predictions)
	Midlands	31%	30%	30%	
	South	43%	43%	44%	
SEG	AB	31%	n/a	30%	Ofcom Media Literacy Interim 2009
	C1	32%	n/a	33%	
	C2	17%	n/a	17%	
	DE	20%	n/a	20%	

Base: English online population (n=2000)/Taking Part sample with home internet (n=9,949)

Exhibit 26: Media use profile of Digital Audiences quantitative research sample

Demographic measure		Digital Audiences sample	Ofcom media literacy
Mobile internet	Have ever used	34%	27% of UK adults have visited a website via mobile
On demand content	Watch/listen to On Demand content	33%	29%
Social networking	Use SNS at least once per week	46%	34%
Digital TV	Have digital TV	91%	89%

Note: Quotas for Digital Audiences are set higher to allow for rapid growth in this area

Exhibit 27: Comparison of arts attendance behaviour across Digital Audiences and Taking Part

Arts attendance in past 12 months	Digital Audiences	Taking Part 2009
Library	42%	40%
Museum or gallery	40%	48%
Play/drama	19%	24%
Other theatre performances (for example musical, pantomime)	19%	
Live rock/indie gig	17%	
Exhibition or collection of art, photography or sculpture	17%	21%
Live pop music performance	15%	
Carnival	12%	12%
Street arts (art in everyday surroundings like parks, streets or shopping centres) or circus (not animals)	12%	
A public art display or installation (an art work such as sculpture that is outdoors or in a public place)	10%	14%
Attended a music festival	9%	
Other live dance event or performance	9%	5%
Craft exhibition (not crafts market)	9%	12%
Classical music performance	8%	9%
Culturally specific festival (e.g. Mela, Baisakhi, Navratri, rural folk events, Irish/Scottish/Welsh events, wassailing)	6%	4%
Opera/operetta	6%	4%
Event connected with books or writing	5%	4%
Jazz music performance	5%	7%
Live urban music performance (e.g. hip hop/garage/DJ set)	5%	
Archive/record office	5%	4%
Ballet	4%	4%
Contemporary dance	4%	3%
Event which included video or electronic art	4%	5%
African people's dance or South Asian and Chinese dance performance	4%	3%
None of the above	24%	(17%)[52]

Base: English online population (n=2000)/Taking Part sample with home internet (n=9,949). Note that empty cells indicate that Taking Part did not have a comparable measure in the 2008/09 survey.

These figures show the attendance for 'own time' only (i.e. it does not include attendance for reasons of paid work, academic study, or voluntary work). Taking Part data is collected quarterly; these figures use only the data from quarters two to four, because quarter one data could not be analysed by 'own time' only.

[52] This figure is based on attendance in own time or for voluntary work; all other figures in this column are based on attendance in own time only.

9.3.2 Attitudinal measures that defined the segments

A varimax rotated factor analysis was conducted, reducing the 52 attitudinal statements to 12 independent factors. This factor solution was chosen because it produced a pattern of results such that each variable loads highly onto just one factor. The solution explains 65% of the variance in the data; the variance not explained is the detail that is lost by using a subset of factors instead of each question. This process involves a trade off between keeping the detail in the data and reducing it to a more manageable subset for modelling purposes. Factors need to be independent for the cluster analysis to work effectively.

Exhibit 28 lists the attitudinal statements from the questionnaire that loaded onto each of the 12 factors (F1 – 12), ordered in terms of the amount of variance that each factor explains. The names for the factors are not important - they are quickly selected to sum up the most significant statements

Exhibit 28: Attitudinal data driving the segmentation, by Digital Audiences segments

% Agree (net of top two boxes)	Digital Audiences sample	Confident core audience	Late adopters	Leading edge user type
F1 Digital technology facilitates access (14%) Digital technology helps me to…….				
…access arts and cultural events that they wouldn't be able to get to otherwise	44%	54%	51%	68%
…save money viewing or listening to arts and cultural experiences	41%	51%	43%	70%
…save time travelling to and from arts and cultural event	38%	44%	40%	65%
…watch performances or listen to music online	56%	76%	56%	76%
…find out about works of art, events and artists	59%	75%	70%	74%
…find out about arts and cultural events	60%	76%	72%	75%
…try things I've never experienced before	56%	69%	59%	78%
…produce and publish work	35%	54%	23%	65%
…share experiences with friends and family	62%	81%	68%	79%
…make something creative	35%	47%	28%	73%
Digital technology allows more people to be involved in arts and culture	58%	70%	63%	82%
F2 Enjoyment of arts/culture (10%)				
Arts and culture experiences are fun and entertaining	51%	59%	54%	73%
I would like to be more involved with arts and culture	33%	37%	27%	65%
I am passionate about arts and culture	23%	25%	12%	52%
Experiences of arts and culture encourage me to think differently about things	48%	54%	48%	74%
Arts and culture activities or events are a good way of spending time with friends and family	54%	62%	58%	73%
People like me don't get involved in the arts and culture	23%	20%	18%	38%
There are other things besides arts and culture that I prefer to do in my leisure time	54%	59%	56%	61%
I enjoy participating in book groups or other informal discussions about literature	19%	17%	11%	58%

% Agree (net of top two boxes) (cont.)	Digital Audiences sample	Confident core audience	Late adopters	Leading edge user type
F3 Poor technical capability for online arts and culture (6%)				
My kit is not good enough to allow me to experience art and culture online	11%	5%	9%	**49%**
My internet speed or connection is not good enough to allow me to experience art and culture online	14%	8%	14%	**47%**
I've heard bad things from people who've tried to experience art or culture online	6%	1%	1%	**41%**
I've tried arts and cultural experiences online but have had poor experiences	7%	3%	2%	**44%**
I worry that online arts content will replace live experiences	20%	22%	18%	**48%**
F4 Love technology/confident online (6%)				
I stay up to date with cutting edge technology	34%	**55%**	6%	**70%**
I love new technology	61%	**80%**	32%	**89%**
I am confident doing a wide range of things on my mobile phone (e.g. calling, texting, taking photos, accessing the internet)	54%	**77%**	24%	**81%**
I often feel like I'm getting left behind with all this new technology and media	34%	15%	**63%**	**55%**
I am confident in doing a wide range of things online (e.g. emailing, uploading photos, downloading music etc)	79%	**98%**	57%	**98%**
F5 Willingness to pay for arts and culture events/online (5%)				
I am prepared to pay for viewing or listening to online arts and cultural events I really want to see/listen	38%	**56%**	39%	**62%**
I am willing to pay for online arts and culture if I get something extra (e.g. exclusive content or access offline)	31%	**45%**	29%	**67%**
I'd pay a small amount on a website I really value to keep content free for everyone	32%	**43%**	29%	**64%**
I am prepared to pay for attending live arts and cultural events I really want to see	70%	**90%**	**81%**	73%
F6 Lack of confidence in using internet to find arts and culture (4%)				
I don't know which arts and culture sites to trust online	22%	14%	24%	**42%**
I don't know where to go online to find out about arts and cultural experiences	20%	13%	21%	**41%**
It's hard to find quality arts and cultural experiences online	15%	11%	9%	**52%**
F7 Online arts and culture reduces the experience (4%)				
The online experience is not as good as seeing or hearing things live	60%	**80%**	**69%**	64%
Experiencing art and culture via digital technology prevents it being a sociable experience	44%	**54%**	**50%**	**60%**

% Agree (net of top two boxes) (cont.)	Digital Audiences sample	Confident core audience	Late adopters	Leading edge user type
The online experience is far reduced and so not worth paying for	39%	37%	<u>31%</u>	**66%**
F8 Enjoyment of learning about specialist interests (4%)				
I enjoy finding out about topics/subjects of interest to me (e.g. WWII, birdwatching, fashion, etc)	76%	**83%**	**85%**	**88%**
I enjoy finding out about the things that I collect (e.g. music, stamps, etc)	51%	**56%**	55%	**81%**
I enjoy finding out about my family history	51%	50%	55%	**66%**
F9 Actively seek out/use arts and culture websites (3%)				
I prefer to use websites that have information from a range of sources and about a range of organisations/cultural activity	54%	55%	55%	**92%**
I am more likely to access a website/blog/discussion if it is associated with a well known cultural brand	34%	34%	33%	**72%**
I actively seek out new sites to experience or find out about arts and culture	23%	23%	<u>14%</u>	**64%**
F10 Free access to museums/galleries/online arts (3%)				
Museums and galleries should be free	80%	<u>73%</u>	**85%**	**92%**
All online arts and culture should be free	63%	<u>56%</u>	<u>56%</u>	**87%**
F11 How happy alone for arts, culture and creative activities (3%)				
I am perfectly happy enjoying an activity on my own	78%	**89%**	**85%**	**87%**
Online activities are something you usually do alone	72%	**82%**	**82%**	**89%**
I like to share interesting content (e.g. videos, websites, pictures) with my friends	45%	**59%**	<u>26%</u>	**74%**
I prefer to take part in group activities	23%	**28%**	<u>14%</u>	**46%**
F12 Arts and cultural activities are expensive (3%)				
It's expensive to get involved in arts and culture	44%	<u>31%</u>	**55%**	**70%**

Base: English online population (2000)/Each cluster (562, 445, 202)

Note: statistically significant differences at the 95% confidence level are denoted by: figures in bold for those higher than the average (over index), and underlined for those lower than the average (under index).

Exhibit 29: Sample composition of Digital Audiences qualitative research sample

Segment:	Confident core	Late adopters	Leading edge
Fieldwork:	One group of eight	One group of eight	One group of eight
Segment demographics:	50% 16-44, 72% ABC1, 57% male, 60% working and 12% students, no strong regional skews	64% aged 45+, 57% female, 91% white British, no strong regional skews, 46% not working (23% are retired), 19% part time	65% 16-34, 58% male, 25% in London, 31% BME, 18% students and 53% full-time workers
Focus group profile:	25-44, ABC1, mostly male, over half to be working, in London or in same city as segment 3	45-64, mostly female, in a regional city (e.g. Manchester), half not working, min two retired, max two minority ethnic	16-24 and mostly male, in London, at least some to be minority ethnic, half students, half workers

9.4 Additional quantitative research data to support this report

Exhibit 30: Online activities with respect to arts and culture, by age group (see exhibit 8)

Activities conducted online P12M (computer/mobile phone activities combined)	16-34 year olds (n=768)	35-54 year olds (n=803)	55+ year olds (n=429)
Found out more about artist/performer or event/exhibition	35%	30%	31%
Viewed the work of others that is specifically creative or artistic (e.g. reading blogs, watching YouTube)	**31%**	16%	11%
Purchased tickets	22%	21%	18%
Watched or listened to a clip of a recording of an arts performance/exhibition	**21%**	13%	13%
Found out how to improve your creative skills	**22%**	12%	9%
Investigated ways of taking part in arts and culture (e.g. lessons, classes, clubs or societies)	**20%**	9%	7%
Found out more about an arts/culture organisation	**19%**	9%	11%
Watched or listened to a recording of a full arts performance/exhibition	**12%**	6%	5%
Uploaded something creative or artistic that you created yourself (e.g. music or animation you created yourself, photos you took as an artistic activity)	**11%**	6%	3%
Used a forum for discussing or sharing arts and culture or commented on a blog	**11%**	4%	2%
Downloaded software or mobile phone app(s) related to the arts	**10%**	5%	2%
Actually use the internet or your mobile phone to create something creative or artistic	**10%**	4%	2%
Publicised something related to arts and culture	**8%**	3%	2%

Base: All in each age group. Note: statistically significant differences at the 95% confidence level are denoted by: figures in bold for those higher than the average (over index), and underlined for those lower than the average (under index).

Exhibit 31: Mobile phone activities with respect to arts and culture, by age group (see exhibit 10 for data based on the total sample)

Activities conducted online P12M using mobile phone	16-34 year olds (n=378)	35-54 year olds (n=241)	55+ year olds (n=56)
Found out more about artist/performer or event/exhibition	11%	9%	3%
Used GPS on your mobile phone to get arts and cultural listings in your area	**12%**	5%	4%
Viewed the work of others that is specifically creative or artistic (e.g. reading blogs, watching YouTube)	**11%**	6%	0%
Watched or listened to a clip of a recording of an arts performance/exhibition	10%	6%	1%
Found out how to improve your creative skills	**9%**	4%	0%
Found out more about an arts/culture organisation	8%	6%	2%
Watched or listened to a recording of a full arts performance/exhibition	8%	5%	0%
Investigated ways of taking part in arts and culture (e.g. lessons, classes, clubs or societies)	8%	4%	0%
Downloaded software or mobile phone apps related to the arts	7%	4%	0%
Tweeted whilst watching a live performance	**9%**	2%	0%
Actually use the internet or your mobile phone to create something creative or artistic	**8%**	2%	0%
Used a forum for discussing or sharing arts and culture or commented on a blog	**7%**	3%	0%
Uploaded something creative or artistic that you created yourself (e.g. music or animation you created yourself, photos you took as an artistic activity)	5%	3%	0%
Publicised something related to arts and culture	4%	4%	0%
Purchased tickets	4%	3%	0%

Base: All in each age group that had previously indicated they use the internet on their mobile phone

Note: statistically significant differences at the 95% confidence level are denoted by: figures in bold for those higher than the average (over index), and underlined for those lower than the average (under index).

Exhibit 32: Daily frequency of conducting social networking activities, by age group

General social networking activity (as a comparison point)	16-34 year olds (n=578)	35-54 year olds (n=463)	55+ year olds (n=174)
Status update	**24%**	<u>14%</u>	<u>4%</u>
Activity relating to arts and culture			
Share information on arts or cultural events with friends	6%	5%	<u>1%</u>
Look for information or offers about an arts or cultural event	5%	2%	1%
Comment on an arts or cultural event whilst attending/watching it	4%	2%	0%
Look for information on an artist or artwork after you've been to an arts or cultural event	4%	2%	1%
Share your experiences of an arts or cultural event (e.g. uploading a photo or video or commenting on an event)	**5%**	<u>1%</u>	<u>0%</u>
Organise an arts or cultural event with a friend	2%	1%	0%
Become a fan of an arts or cultural organisation	**4%**	<u>1%</u>	0%
Participate in an arts or cultural event	**3%**	<u>0%</u>	0%

Base: All in each age group that had previously indicated they use SNS at least once a month. Note: statistically significant differences at the 95% confidence level are denoted by: figures in bold for those higher than the average (over index), and underlined for those lower than the average (under index).

Exhibit 33: Prevalence of 'ever' conducting social networking activities, by age group

General social networking activity (as a comparison point)	16-34 year olds (n=578)	35-54 year olds (n=463)	55+ year olds (n=174)
Status update	**93%**	91%	<u>83%</u>
Activity relating to arts and culture			
Share information on arts or cultural events with friends	**70%**	<u>57%</u>	<u>44%</u>
Look for information or offers about an arts or cultural event	**62%**	<u>50%</u>	<u>46%</u>
Comment on an arts or cultural event whilst attending/watching it	**55%**	<u>39%</u>	<u>19%</u>
Look for information on an artist or artwork after you've been to an arts or cultural event	**60%**	<u>48%</u>	<u>32%</u>
Share your experiences of an arts or cultural event (e.g. uploading a photo or video or commenting on an event)	**65%**	<u>46%</u>	<u>30%</u>
Organise an arts or cultural event with a friend	**54%**	<u>37%</u>	<u>18%</u>
Become a fan of an arts or cultural organisation	**62%**	<u>47%</u>	<u>25%</u>
Participate in an arts or cultural event	**55%**	<u>37%</u>	<u>19%</u>

Base: All in each age group that had previously indicated they use SNS at least once a month. Note: statistically significant differences at the 95% confidence level are denoted by: figures in bold for those higher than the average (over index), and underlined for those lower than the average (under index).

Exhibit 34: Demographic profile of Digital Audiences segments

Demographic measure		Digital Audiences sample	Confident core audience	Late adopters	Leading edge user type
Age	16-24	16%	**22%**	5%	**27%**
	25-34	22%	**28%**	12%	**38%**
	35-44	23%	22%	20%	22%
	45-54	17%	15%	**27%**	7%
	55-64	12%	9%	**19%**	3%
	65+	9%	3%	**18%**	3%
Gender	Male	52%	**57%**	43%	58%
	Female	48%	43%	**57%**	42%
Region	North	26%	24%	28%	27%
	Midlands	31%	30%	33%	23%
	South	43%	46%	39%	50%
Working status	Working	59%	**63%**	53%	64%
	Housewife/carer	8%	8%	9%	7%
	Student	8%	**12%**	2%	**18%**
	Retired	13%	8%	**23%**	4%
SEG	AB	31%	**35%**	28%	29%
	C1	32%	**36%**	31%	34%
	C2	17%	13%	20%	18%
	DE	20%	15%	20%	18%
Annual household income	<£20,000	30%	24%	33%	29%
	£20,000-39,000	36%	38%	36%	29%
	£40,000-59,999	14%	16%	15%	16%
	>£60,000	8%	**12%**	6%	11%
	Refused	12%	10%	10%	14%
Marital status	Married	44%	39%	56%	41%
	Unmarried in a relationship	20%	25%	15%	20%
	Civil partnership	1%	1%	*	4%

Demographic measure (cont.)	Digital Audiences sample	Confident core audience	Late adopters	Leading edge user type	Demographic measure (cont.)
	Single	24%	28%	14%	33%
	Divorced	6%	4%	8%	2%
	Separated	1%	1%	1%	*
	Widowed	2%	1%	4%	*
	Refused	1%	1%	1%	-

Base: English online population (2000)/Each cluster (562, 445, 202)

Note: statistically significant differences at the 95% confidence level are denoted by: figures in bold for those higher than the average (over index), and underlined for those lower than the average (under index).

Exhibit 35: Arts attendance amongst Digital Audiences segments

Arts attendance	Digital Audiences sample	Confident core audience	Late adopters	Leading edge
Library	42%	46%	**50%**	46%
Museum or gallery	40%	**47%**	42%	43%
Play/drama	19%	21%	20%	24%
Other theatre performances (for example musical, pantomime)	19%	22%	**26%**	17%
Live rock/indie gig	17%	**25%**	<u>12%</u>	**23%**
Exhibition or collection of art, photography or sculpture	17%	**22%**	16%	22%
Live pop music performance	15%	**21%**	12%	18%
Carnival	12%	14%	15%	14%
Street arts (art in everyday surroundings like parks, streets or shopping centres) or circus (not animals)	12%	12%	10%	**20%**
A public art display or installation (an artwork such as sculpture that is outdoors or in a public place)	10%	**14%**	11%	11%
Attended a music festival	9%	**14%**	<u>5%</u>	**19%**
Other live dance event or performance	9%	10%	8%	**17%**
Craft exhibition (not crafts market)	9%	8%	10%	**14%**
Classical music performance	8%	8%	9%	9%
Culturally specific festival (e.g. Mela, Baisakhi, Navratri, rural folk events, Irish/Scottish/Welsh events, wassailing)	6%	**8%**	5%	9%
Opera/operetta	6%	7%	<u>3%</u>	**13%**
Event connected with books or writing	5%	6%	4%	**10%**
Jazz music performance	5%	7%	5%	**12%**
Live urban music performance (e.g. hip hop/garage/DJ set)	5%	**7%**	<u>1%</u>	**12%**

Arts attendance (cont.)	Digital Audiences sample	Confident core audience	Late adopters	Leading edge
Archive/record office	5%	6%	6%	**10%**
Ballet	4%	3%	5%	**10%**
Contemporary dance	4%	5%	3%	**10%**
Event which included video or electronic art	4%	**6%**	<u>1%</u>	**12%**
African people's dance or South Asian and Chinese dance performance	4%	4%	3%	**10%**
None of the above	24%	<u>18%</u>	21%	<u>16%</u>

Base: English online population (2000)/Each cluster (562, 445, 202)

Note: statistically significant differences at the 95% confidence level are denoted by: figures in bold for those higher than the average (over index), and underlined for those lower than the average (under index).

Exhibit 36: Arts participation amongst Digital Audiences segments

Arts participation	Digital Audiences sample	Confident core audience	Late adopters	Leading edge
Reading	68%	**77%**	**77%**	<u>59%</u>
Crafts such as textiles, wood crafts, pottery or jewellery making	15%	16%	18%	17%
Painting, drawing, printmaking or sculpture	14%	15%	11%	**33%**
Played a musical instrument for your own pleasure	13%	**17%**	<u>8%</u>	**20%**
Photography as an artistic activity (not family or holiday)	12%	**15%**	<u>6%</u>	**23%**
Used a computer to create original artworks or animation	9%	**13%**	<u>3%</u>	**19%**
Written any stories or plays, or any other creative writing (off line)	8%	10%	<u>5%</u>	**14%**
Written any poetry (online or offline)	7%	8%	<u>4%</u>	**16%**
Other dance (not for fitness)	7%	8%	5%	**11%**
Written a blog, narrative or any other creative writing online	7%	**10%**	<u>3%</u>	**13%**
Taken part in a carnival or other live festival event (e.g. as a musician, dancer, costume maker or other performer)	5%	5%	<u>2%</u>	**15%**
Composed music (e.g. created your own original music)	5%	**7%**	<u>0%</u>	**13%**
Sang to an audience or rehearsed for a performance (not karaoke)	5%	6%	<u>2%</u>	**10%**
Played a musical instrument to an audience or rehearsed for a performance	5%	5%	<u>1%</u>	**14%**
Made films or videos as an artistic activity (not family or holiday)	4%	**6%**	<u>1%</u>	**8%**
Remixed music	4%	4%	<u>0%</u>	**13%**
Rehearsed or performed in a play, musical or opera	4%	3%	<u>1%</u>	**13%**

Arts participation (cont.)	Digital Audiences sample	Confident core audience	Late adopters	Leading edge
Taken part in street arts (e.g. learned or practiced circus skills)	2%	2%	<u>-</u>	**9%**
Ballet	2%	1%	1%	**6%**
None of the above	19%	<u>13%</u>	<u>14%</u>	<u>11%</u>

Base: English online population (2000)/Each cluster (562, 445, 202)

Note: statistically significant differences at the 95% confidence level are denoted by: figures in bold for those higher than the average (over index), and underlined for those lower than the average (under index).

Exhibit 37: Technology at home: Digital Audiences segments

Access to technology	Digital Audiences	Confident core	Late adopters	Leading edge
Broadband internet connection	91%	92%	93%	<u>84%</u>
Laptop/notebook computer	71%	**81%**	<u>61%</u>	**79%**
Desktop computer	70%	70%	70%	68%
WiFi Internet connection (wireless)	53%	**65%**	<u>44%</u>	59%
HD TV	46%	**51%**	<u>38%</u>	50%
Digital television recorder/Sky+/Virgin+	42%	**50%**	<u>35%</u>	38%
Xbox 360, Wii or PS3	42%	**52%**	<u>30%</u>	**54%**
Smartphone such as Blackberry, iPhone etc that allows you to run software, play media, connect to the internet etc	28%	**37%**	<u>14%</u>	**42%**
Home cinema/surround sound	22%	**26%**	<u>16%</u>	**30%**
Mobile broadband on your computer/laptop (using a USB dongle)	19%	22%	<u>11%</u>	**36%**
Dial-up internet	2%	<u>1%</u>	2%	**6%**

Base: English online population (2000)/Each cluster (562, 445, 202)

Note: statistically significant differences at the 95% confidence level are denoted by: figures in bold for those higher than the average (over index), and underlined for those lower than the average (under index).

Exhibit 38: Online activities: Digital Audiences segments

Online activities undertaken on PC/laptop/mobile	Digital Audiences	Confident core	Late adopters	Leading edge
Emailing	87%	**91%**	90%	<u>78%</u>
Searching for information	80%	**86%**	**86%**	<u>71%</u>
Shopping/buying goods or services	75%	**82%**	**80%**	72%
Visiting specific websites of interest	72%	**82%**	74%	67%
Finances (e.g. banking, paying bills)	63%	**72%**	63%	<u>53%</u>
News/newspaper websites	56%	**63%**	52%	**64%**
Social networking sites (e.g. Facebook, Twitter, Bebo, etc)	45%	**60%**	<u>27%</u>	**62%**
Watching/listening to on demand content (e.g. on BBC iPlayer, 4oD, ITV player, Demand Five etc)	33%	**45%**	22%	39%
Instant messaging (e.g. MSN)	33%	**38%**	<u>18%</u>	**57%**
Selling goods (e.g. eBay)	32%	**38%**	<u>24%</u>	**40%**
Viewing the work of others (e.g. reading blogs, watching YouTube)	31%	**44%**	<u>18%</u>	**42%**
Watching/listening to live TV/radio	29%	**34%**	<u>17%</u>	**46%**
Video/computer games	28%	**37%**	17%	**42%**
Streaming / downloading music (e.g. iTunes, music podcasts, Spotify)	25%	**38%**	13%	**36%**
Photo sharing	22%	**28%**	12%	**42%**
Telephone calls (e.g. Skype)	18%	**19%**	12%	**33%**
Learning how to do something (e.g. playing guitar)	14%	**20%**	8%	**29%**
Researching your family tree	12%	10%	15%	**20%**
Reading/downloading ebooks	11%	12%	3%	**34%**
Creating, uploading or sharing content (e.g. YouTube, blogging, Flickr)	10%	11%	3%	**27%**
Chat rooms	8%	8%	3%	**24%**
Creating, uploading or sharing content that you have created yourself (e.g. YouTube, blogging, Flickr)	8%	11%	1%	**20%**
Blogging	8%	9%	3%	**19%**
Mean hours spent using Internet in leisure time (per day)	3.53	3.64	<u>2.65</u>	**4.42**

Base: English online population (2000)/Each cluster (562, 445, 202)

Note: statistically significant differences at the 95% confidence level are denoted by: figures in bold for those higher than the average (over index), and underlined for those lower than the average (under index).

Exhibit 39: Use of mobile internet: Digital Audiences segments

Mobile internet	Digital Audiences sample	Confident core audience	Late adopters	Leading edge
Access to mobile internet	52%	**66%**	34%	**67%**
Use of mobile internet	34%	**48%**	14%	**63%**
Daily use of mobile internet	9%	14%	1%	**22%**

Base: English online population (2000)/Each cluster (562, 445, 202)

Note: statistically significant differences at the 95% confidence level are denoted by: figures in bold for those higher than the average (over index), and underlined for those lower than the average (under index).

Exhibit 40: Online activities with respect to arts and culture by Digital Audience segments

Activities conducted online P12M (PC/laptop)	Digital Audiences sample	Confident core audience	Late adopters	Leading edge
Found out more about an artist/performer or event/exhibition	31%	**44%**	33%	24%
Looked for information regarding arts/culture events and/or purchased tickets	28%	**37%**	30%	29%
View the work of others that is specifically creative or artistic (e.g. reading blogs, watching YouTube)	20%	**30%**	13%	23%
Watched or listened to a clip of a recording of an arts performance or exhibition	15%	**23%**	12%	18%
Found out how to improve your creative skills	14%	**19%**	9%	**27%**
Found out more about an arts or culture organisation	13%	**17%**	8%	**23%**
Investigated ways of taking part in art and culture (e.g. lessons, classes, clubs and societies)	12%	**16%**	8%	**18%**
Watched or listened to a recording of a full arts performance or exhibition	7%	**10%**	3%	**18%**
Uploaded something creative or artistic that you created yourself (e.g. music or animation you created yourself, photos you took as an artistic activity)	6%	**10%**	3%	**12%**
Downloaded software or mobile phone app(s) related to the arts	6%	**9%**	1%	**15%**
Actually used the internet or your mobile phone to create something creative or artistic	5%	6%	2%	**17%**

Base: English online population (2000)/Each cluster (562, 445, 202)

Note: statistically significant differences at the 95% confidence level are denoted by: figures in bold for those higher than the average (over index), and underlined for those lower than the average (under index).

Exhibit 41: Online activities with respect to arts and culture, by Digital Audience segments

Activities conducted online P12M (mobile phone activities only)	Digital Audiences sample	Confident core audience	Late adopters	Leading edge
Looked for information regarding arts/culture events and/or purchased tickets	11%	11%	7%	**22%**
Found out more about an artist /performer or event/exhibition	10%	9%	8%	**23%**
Used GPS on your mobile phone to get arts and cultural listings in your area	9%	11%	*	**16%**
View the work of others that is specifically creative or artistic (e.g. reading blogs, watching Youtube)	9%	8%	6%	**21%**
Watched or listened to a clip of a recording of an arts performance or exhibition	8%	8%	6%	**17%**
Found out how to improve your creative skills	7%	5%	-	**14%**
Found out more about an arts or culture organisation	7%	7%	2%	**12%**
Watched or listened to a recording of a full arts performance or exhibition	6%	5%	1%	**17%**
Investigated ways of taking part in art and culture (e.g. lessons, classes, clubs and societies)	6%	3%	-	**21%**
Downloaded software or mobile phone apps related to the arts	6%	5%	2%	**15%**
Tweeted whilst watching a live performance	6%	4%	*	**13%**
Actually used the internet or your mobile phone to create something creative or artistic	5%	4%	1%	**15%**
Used a forum for discussing or sharing arts and culture or commented on a blog	5%	1%	1%	**18%**
Played mixed/augmented reality mobile games	5%	3%	-	**11%**

Base: Those that use the internet on their mobile phone (792)/Each cluster (316, 92, 133). Note: statistically significant differences at the 95% confidence level are denoted by: figures in bold for those higher than the average (over index), and underlined for those lower than the average (under index).

Exhibit 42: Mean spend for arts and cultural activities, by Digital Audience segments

Mean spend	Digital Audiences Sample	Confident core audience	Late adopters	Leading edge
Attendance	£89	£124	£92	£104
Participation	£90	£149	£66	£97
Online (PC/laptop/mobile)	£29	£41	£34	£44

Base: English online population (2000)/Each cluster (562, 445, 202)

9.5 References

9.5.1 *URLs of websites mentioned in the report*

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Arts Council England www.artscouncil.org.uk

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Department of Culture, Media and Sport www.culture.gov.uk

Arts & Business www.artsandbusiness.org.uk

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