

**IT and Digital Content Audit of Arts Council England
North West's Regularly Funded Organisations**



**Prepared for: ARTS COUNCIL ENGLAND,
NORTH WEST (ACE NW)**

By: Arts Magnet



**(Questionnaire data collated and analysed by
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Final Report

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1. Overview

FOREWORD, by Michael Eakin, Executive Director, Arts Council England, North West.

In all areas of enterprise, businesses are investing in information technology (IT), new media and digital content to be competitive. This is as important for arts organisations as any other, as they seek to open up new markets, present their work in innovative ways, and widen their engagement with the public.

Fascinating new possibilities have emerged for the role of the artist and the nature of the arts because of the impact of digitisation and new technologies. The very process of creation, collaboration and co-production is transformed by technology, which is making it possible for more people than ever before to make and distribute their work. Working creatively, and sharing that work, is now available to more people than ever before..

And the technology also offers new scope for the consumption of arts and cultural material. Live attendance and participation in the arts will always carry special immediacy and value and can never be wholly replaced by the electronic experience. However research shows that people want to engage with the arts in new ways, both as audiences and participants. New technology is revolutionising how we learn about the arts, experience the arts, engage with the arts, and disseminate the arts.

In commissioning this IT and Digital Content audit, Arts Council England North West wanted to measure where we are as a sector in relation to IT and ensure that we maximise the opportunity this technology offers us. The Audit has been run in partnership with Arts Magnet, the digital development agency for the arts sector in the North West (NW). The results of the audit are contained in this report. Many thanks to the 80% of all North West Regularly Funded Organisations (RFOs) who responded. We now have a clear picture of where we are at in relation to this topic, and look forward to using this information to support the sector in its future strategies for the use of IT in meeting its artistic, audience, and business aspirations.

Executive Summary

The IT and Digital Content Audit took place between January and March 2006. The aim of the audit was to interrogate arts organisations' e-business and digital content capability. The audit was cross-art form, 80% of Arts Council England North West's (ACE NW) regularly funded organisations (RFOs) responded. Artistic directors, marketing and IT staff were all questioned to ensure an accurate representation of each organisation.

2 years ago, Arts Magnet measured a smaller, representative sample of the NW's arts sector. Attitudes towards, and capability around IT and digital content recorded then provide a starting level benchmark. This audit proves that as a sector our attitudes have progressed: we have moved on culturally from two years ago:

- Many artistic directors now have ambition and a sense of excitement about developing digital content around their core artistic practice. 100% of artistic directors of visual arts organisations stated that the creation of digital content around artistic activity fitted into their artistic vision. 76% of performing arts RFOs reported the same commitment.
- Marketing departments have channelled effort and funds towards developing websites and e-communications – 95% of organisations now have a web presence.
- The NW's biggest arts organisations have their own IT support staff. Smaller organisations have a relatively high level of general staff IT capability, with younger staff in particular increasing this capability.
- RFOs are investing in IT in terms of the efficiencies it offers for administrative functions.

Simultaneously, there is evidence that the reality is that:

- the ambitions communicated by artistic directors are not backed up by allocation of funds – only 35% of RFOs have funding set aside for the creation of digital content;
- IT and digital content's potential for engaging and developing audiences, selling, distributing and creating digital art are far from realised;
- digital content projects happen in isolation;
- the visual arts sector is significantly better at distributing digital content (92% of visual arts organisations' websites display images of art; only 29% of performing arts websites also had this function);

- arts organisations do not know the profile and in many cases, the numbers, of their virtual visitors;
- IT and digital content creation training is, at best, *ad hoc*; and
- only 12.5% of the RFOs in the North West (14 organisations) offer any online ticketing - all of these being performing arts organisations.

The main barriers to IT and digital content development reported were:

- funding (80% organisations reported this); and
- staff skills (70+%).

Lack of knowledge, resources, and budget take the blame for low capacity.

There is also a general sense that the sector lacks the nerve to “go for it” digitally. As one interviewed artistic director put it:

We're inbetweeny – semi developed in everything. Website, online ticketing, e-marketing. It seems we're lacking the nerve to go for it entirely. When do you take the leap?

Compounding this is the arts sector's trait to compare only with each other. Few organisations communicated understanding that other creative industries/leisure sector digital developments – and audiences' reaction to them – might be comparable.

The overall picture that has emerged is one of thwarted aspiration: ideas in place are not limited by imagination or lack of ambition, but by a lack of inclusion in formal strategic documentation; budgets and capacity planning; and organisational development thinking.

As the detailed results and analysis reveal, below, there are big gaps between aspiration and actual current and planned capability and capacity.

INTRODUCTION, by Hannah Rudman, Director, Arts Magnet.

Technology is ubiquitous, but what about art?

Art *should* be ubiquitous! Everyone should care about the arts. Everybody's lives should be enhanced by the chance to experience great art. Why? Because interacting with great art produces that moment of inspiration that makes us care about art and creativity. It helps us experience what it means to be human on a deeper level and encourages us to develop our own imaginations. However, currently in the general public's experience, it is technology that is ubiquitous and art that is rare.

I believe that making art accessible for everyone is achievable. It is possible to inspire everybody about the value of the arts, and excite them about their own creativity and imaginations. But people need to receive these messages in relevant and appropriate ways to them. Our communication and socialisation "ecologies" are changing, but our basic human needs aren't: we will still want in our lives cultural vibrancy from excellent artistic products.

The emergence of new technologies and the prevalent nature of digital devices gives the arts a channel to be ubiquitous:

- The falling cost of hardware and bandwidth has increased user demand for "rich" (or multimedia/multisensory) content. Most existing content providers have pitched in at the lowest common denominator level (football, porn), but this isn't what all users are looking for. As one NW Artistic Director duly noted during the interviews for this audit:

If the content's rubbish then the digital content is rubbish.

- Relevant and appropriate content is far more attractive to the user. In venue and as core activity, arts organisations naturally produce rich content that is both relevant and appropriate.
- As a sector, we make good content – lets make good digital content then, because in this world of ever-expanding content, quality and relevance will be the differentiator.

Existing audiences and young, potential audiences in the early 21st century

The impact of technology has changed the way that 21st century society works and plays – IT has changed the way that we gather information,

communicate and consume. 21st century consumers are setting the pace of the need for businesses to engage with IT. Our existing arts audiences are very much a part of this driving force.

Attitudes and opportunities towards creativity have also changed, especially for young people: our potential audiences.

- Think how easy it now is to use a computer toolkit to “be creative” at a semi-professional level, despite having no formal training or years of apprenticeship to hone your skills. Its relatively easy now to design your own website; create your own playlist; photo slideshow; DVD of home movies. Individual lives are artistically enriched through creative actions or curative choices. No longer does this enrichment happen solely through the actions/mediation of arts organisations in individual lives.
- By their technological, cultural and emotional choices, young audiences are what new media consultant David Doherty has coined “cookie monsters”¹. Young people expect technology to give them access to all kinds of art and experience without any respect for property rights or payment. Free use of technology is emerging an informal collective amongst teenagers. Are young people ‘stealing’ this content, or are they logically concluding that interactive media demands economic models that aren’t based on scarcity and property?

The arts sector has the opportunity NOW to respond to existing audiences and attract new and young audiences by producing high quality digital content that complements - with integrity - the live/venue-based experience. There is an essential job for the arts here: to promote and inspire; to showcase skill; provide the best examples of good design; as well as provide access to artist-generated content for users to “mash-up” into their own creations.

There are business and audience development challenges that have come about because of the impact of technology on 21st century life. The time to address these challenges is now: we can grasp the current opportunities to develop, and so ensure we keep up with other sectors who all compete for our audiences’ leisure time/spending money.

Considering digital content development and e-business practices as part of overall business strategies provides the arts sector with opportunities to:

¹ Referenced by Pat Kane in *The Play Ethic*, Macmillan 2004.

- retain existing 21st century audiences, whose new ways of communicating; learning; gathering information; and creating can be served by our sector;
- attract potential new / young audiences through our digital content's quality and relevance;
- be part of emerging income-generating digital content creating markets;
- build strategic alliances with other creative industries who are also currently looking at new models of digital content co-production²; and
- effectively be part of fast-growing global digital networks

We have the opportunity now to renew and revitalise our own sector economy by embracing e-business and digital content.

But more importantly, we have the opportunity to renew and revitalise society as a whole, by proving that art is a key part of our new digital landscape and will therefore continue to be a relevant and appropriate source of inspiration and challenge in the 21st century.

And so to the regional IT and digital content audit: over 2005/6 there have been numerous national calls for action on IT development directed at the creative and cultural industries by thinkers and writers concerned with sector capability and development. (These are listed at the end of this report in the Bibliography of Further Research). The aim of report is to provide clear and accurate information on current IT and digital content capacity; and a basic indication of the integration of new technologies and digital content within artistic and operational practices.

Only by knowing where we are at can we begin to consider where we should go.

² E.g. Broadcasters, who are currently considering how they can co-produce locally relevant digital content with community groups.

METHODOLOGY

The audit had two phases, firstly gathering quantitative information on every RFO's current ICT and new media capacity. The second phase involved interrogation of a representative selection of RFO's with the aim of understanding the place of IT and digital content in their organisational culture.

A steering group of stakeholders oversaw the development of each phase of the audit the analysis and the report, including representatives from:

- The Northwest Culture Observatory
- Creative Industries Agency reps
- Manchester Digital Development Agency
- Arts About Manchester
- Arts Magnet
- Arts Council NW

Phase 1 – Information gathering on current capacity.

Aim:

The first phase of the audit involved the gathering of quantitative information on the RFOs' current ICT and new media capacity by means of an online audit

Morris Hargreaves McIntyre in consultation with Arts Magnet and the Steering Group designed three online surveys to capture this information; one to be completed by Artistic Directors, one by Marketing staff and one by IT staff, or the staff responsible for the roles and responsibilities implied by these job titles. The surveys can be viewed at:

<http://www.lateralthinkers.com/mhm/artistic.htm>

<http://www.lateralthinkers.com/mhm/itstaff.htm>

<http://www.lateralthinkers.com/mhm/marketing.htm>

The questionnaires were piloted by a sample group of RFOs, and their comments on accessibility, data protection and relevance integrated prior to wider release. In addition to the online versions, hard copies of the questionnaires were mailed to every RFO together with a covering letter from Michael Eakin, Chief Executive of ACE North West and an

information sheet of Frequently Asked Questions (FAQs). This approach gave organisations the option to either complete the audit online or fill in a paper copy.

Collation and Analysis

The information was collated via SNAP e-survey software (completed paper copies were uploaded), and Morris Hargreaves McIntyre worked to analyse and summarize findings.

Phase 2 – Depth Interviews: new technologies, digital content and organisational culture.

Aim:

To develop an understanding – at the broadest level - of the level of current impact of new technologies and digital content within the organisational cultures of NW RFO's.

Methodology:

We selected a representative group of RFO's (different art forms, locations, sizes and funding levels) to participate in an interview. Interviews were conducted with the organisations' Artistic Director or Chief Executive by phone by Arts Magnet. Anonymity was guaranteed, and interviews were recorded for archiving and note taking.

Feedback on the methodology

Whilst we tried to ensure a “belt and braces” approach to giving advice about how to fill in the questionnaire, a few smaller RFOs felt the guidance was not particularly appropriate to them in its tone and scale.

Response Rates and Final Sample

There are 116 RFOs operating within the North West region, covering the performing arts, visual arts, literature and external relations and development. The numbers of organisations working in each of these sectors is included in Table 1. The table also shows the make-up of the RFO sector in the North West and the composition of the sample on which the data reported on in this document is based; it also includes the response rates for each type of organisation and for the RFOs overall.

Table 1: RFOs in the North West region

	No. of RFOs by type	% of RFOs by type	No. Returns by type	% of Returns by type	% of total RFO Response
Performing Arts	67	58%	46	52%	69%
Visual Arts	19	16%	16	18%	84%
Literature	7	6%	6	7%	86%
External Relations & Development	23	20%	21	24%	91%
Total	116 ³	100%	89	100%	77% ⁴

As the table shows, 89 of the 116 RFOs completed at least one part of the audit (Artistic Director, Marketing or IT), with most organisations completing all three. There was some variation in response rates between the different types of RFOs; 21 of the 67 (31%) performing arts organisations did not submit a return compared to a 9% non-return from RFOs involved in external relations and development. As a result, performing arts organisations are marginally under-represented in the final sample (52% cf. 58%). However, for the purpose of analysis, the steering group agreed that the final sample of 89 RFOs would provide a sufficiently representative picture of the current situation within the North West.

³ Current RFOs not included in this survey were 6 local council-based arts development departments, and 3 organisations whose RFO status ends in April 2006.

⁴ 4 organisations returned questionnaires late, so their results are not included in this response rate. There were 93 returns in total – 80%.

Results and Analysis

Strategic approaches to IT

A starting point for assessing an organisation's commitment to embedding IT and new media into all aspects of its operation is the existence of a formal, written IT strategy.

70% of the Chief Executives/Artistic Directors interviewed communicated that considering strategic development of new technologies/digital content happens at the highest levels within NW arts organisations. Whilst some discussed playing a leading role and are the primary developers and facilitators of discussion about new technologies, others facilitate their senior management teams' discussions and suggestions. Even in small organisations, artistic directors report that new technologies are considered at strategic level. Despite these aspirational discussions taking place at the appropriate management level, one of the most significant findings of this audit is that 78% of the RFOs in the North West don't have a written IT strategy; visual arts organisations (40%) were more likely than their performing arts counterparts (17%) to have formalised a strategic approach to the deployment of IT within their organisation. However, only 26% of visual arts organisations and 2% of performing arts organisation have a written IT strategy that encompasses artistic as well as administrative functions.

There are some RFOs where the creation of digital content is inappropriate to the creative process, and a conscious decision has been made not to use IT for artistic functions.

Creative digital content is not artistically interesting to us

The nature of our work is by definition fleeting, transient and short-lived – the process of creating digital add-ons would appear to be over labour intensive and at odds with the nature of the work

Contact between the audience and our work is largely spontaneous – something they come across in the street

It is not a significant artistic media that we can use in our work, which is a live, direct experience

Other organisations assume that the profile of their audience means that they wouldn't be interested in digital work:

Our audience are rather elderly, and they don't demand technology. I don't think they use computers, or digital content.

A lot of our audience are older – don't use the technology

Our audience is mainly aged under 10, and children tend to accept whatever is put in front of them. We have no plans to radically upgrade.

Although, as will be demonstrated later, organisations actually know very little about who is accessing their online content.

We're not exactly sure – there is little information crossing over from our website into our database.

In most cases, consideration of how IT may be involved in, or enhance the creative/artistic process remains an ad hoc process, limited by funding, IT skill levels and the availability of staff. Whilst the RFOs all make some use of IT and new media, their adoption of IT and its attendant functions is more reactive than pro-active, more tactical than strategic.

6 of the arts organisations interviewed had existing audiences consisting of a very broad cross-section of a local population. These audiences were considered loyal, so arts organisations had not conducted market research to see whether it was the website, brochure or direct invitations that brought existing audiences back.

Other organisations interviewed expressed the usual desire to attract new young and culturally diverse audiences. For this purpose:

New technologies are vastly underused. Audiences should be getting more info before and after the show as well.

Anecdotally, and looking at our website's basic statistics, we know that first time visitors want more content available online.

Online booking makes things easier for new audiences.

In general terms, the use of IT for administrative functions is universal; its potential for engaging and developing audiences, selling, distributing and creating digital art far from realised.

IT Capacity

73 of the 89 RFOs audited returned data on both staff numbers and the number of computers at their organisation. At these 73 venues, there were 868 computers to 967 staff, a ratio of 0.9:1.

The RFOs participating in the audit ranged in size from one member of staff to over 120 and whilst larger organisations were more likely to have IT staff, overall only 14% of the RFOs had dedicated IT personnel. Though only 14% of RFOs have specialist IT staff, 26% have resources in-house to maintain their IT systems, suggesting that responsibility for IT is incorporated either formally or informally into the roles of other staff within the organisations. Given the lack of IT staff, it might be expected that there is a commitment to developing the IT skills of other staff; however only half of the RFOs (56%) make provision for IT training either through internal or external courses or via online resources, books or CDs.

The lack of specialist IT staff, means that many RFOs are dependent on external contractors for maintenance and technical support (46%) and for developing their websites; 68% of RFOs are dependent to some extent on external staff designing new pages for their websites. However, they have achieved a greater degree of self-sufficiency in terms of adding or updating website content with only 38% using external staff to achieve this.

Artistic directors and IT staff were asked to compare their organisation's use of IT and new media against that of their peers. 13% of IT staff thought their organisation more advanced than their peers in their use of IT; 19% of artistic directors believed their organisation to be making more artistic use of IT and new media. In some cases, this advancement is due to the inherent IT or new media remit of the organisation:

This is our area of expertise and drives our artistic vision and curatorial policy

We have an international remit and the web is our primary recruitment and advertising tool

In other cases it is driven by individual staff members' interest in technology:

The Artistic Director and Technical Manager have a genuine interest in digital content

In some instances, organisations genuinely felt that they were the 'innovators' or early adopters amongst their peers, others that they didn't have to be particularly well advanced to be 'ahead of the game' in the sector.

Most disability arts organisations are under-funded, so it doesn't take much to do more.

We have a website – not all rural touring schemes do!

Barriers to IT

Artistic directors, marketing and IT staff were asked to identify the barriers to the development of IT at their organisations. Across all three areas of operation, a lack of funding was identified as the main barrier to development by more than 80% of staff. Lack of staff time (70%+) was also seen as a major problem in extending an organisation's IT capabilities. There is also a clearly identified IT skills gap within the RFOs, though this is more likely to be seen as a barrier by artistic directors (64%) than by IT staff (49%). A lack of knowledge and understanding of IT is regarded as much less of a barrier (~25%), although almost 20% of IT staff felt that the full potential of IT isn't recognised or acknowledged within their organisation.

Interviews proved that with the exception of the NWs larger organisations, very little structure is in place to measure IT and digital content skills and to ensure that staff have IT training needs met. Training and development is at best ad hoc, meaning that the relevance and up-to-date-ness of any younger staff members' inherent skills is only ever decreasing. The larger organisations and those that are also funded by the local councils have the scope to be able to offer more in depth appraisal and training needs reviews. However, training is provided on a reactive, rather than proactive basis.

IT Activity

In analysing the results of the IT and Digital Content Audit, we will look at organisations' use of IT and new media in **four** different areas of their operation:

- Administration
- Sales and marketing

- Distribution of work
- Creation of artistic content

Administration

RFOs are investing in IT at least in terms of the efficiencies it offers for administrative functions. More than three quarters of the RFOs in the North West have broadband Internet connections, less than 10% are still dependent on dial-up access. Most are using the latest operating systems, Windows XP and Mac OSX on Windows and Mac platforms respectively. All the RFOs are using word processing (100%) and spreadsheet (99%) software such as Word and Excel and the vast majority (93%) are also using database software (Access, FileMaker). Specialist accounting and finance software packages such as Sage and MYOB are also widely used although only one in five organisations use specialist project management software such as MS Project to manage and plan the allocation of resources.

In terms of investment, a quarter of RFOs are planning exceptional expenditure on software and hardware over the next three years. There is some investment planned for podcasting, video conferencing, web-casting and online ticketing but most of this investment in the first instance is to upgrade existing systems and software rather than to support major new developments in IT and new media capability.

Sales and Marketing

To provide a context for this section of analysis, let us first consider audiences' current access to the Internet and estimated levels of consumption.

Markets and Audiences

In December 2005, there were an estimated 1 billion people using the Internet worldwide; put another way, one in every six people in the world now uses the Internet. Since 2000, the number of global Internet users has grown by 182%. The Middle East has experienced the largest percentage growth (454%) with 18.2 million people in this region now online.

Within Europe, the number of users has grown by 176% since 2000 to 290 million people, representing a penetration into the population of 36%. Internet users in Europe account for 28.5% of the worldwide market, with North America accounting for 22.2% and Asia 35.7%

In the UK, where the number of users now stands at 37.8 million (145% growth since 2000), 63% penetration of the population has been achieved. Within the European Union, only Denmark, Sweden and the Netherlands have achieved higher penetration rates.

In the North West, the proportion of households with home access to the Internet has increased from 9% to 46% (1.3 million households) between 1998-9 and 2003-4. In 2004-05, the National Statistics Omnibus Survey estimated that 57% of adults in the North West (approximately 3.1 million people) now have Internet access.

Internet Access Amongst Arts Attenders

Traditionally, arts audiences have been drawn from the higher income ABC1 socio-economic groups, and whilst audience development and social-inclusion initiatives have sought to make the arts more accessible to C2DEs, arts attenders are still more likely to be ABC1s. Given the greater likelihood of ABC1s to have Internet access, not surprisingly, the level of access amongst arts attenders is typically 10-20% higher than that in the population.

Following the trends observed in the population as a whole, the proportion of arts attenders with Internet access has also increased significantly in the past five years. In 2001, a population survey carried out in the South West of Scotland showed that 49% of current and potential arts attenders had Internet access. A similar survey carried out in the North East of Scotland in 2004 found that 72% of the current and potential audience had access to the Internet. Research carried out by Morris Hargreaves McIntyre in October-December 2005 amongst museum and art gallery attenders in Manchester showed that more than 80% were now online.

A report published in 2002 on young peoples' use of ICT suggests that the next generation of arts attenders, having grown up with computers and the Internet as part of their daily life, will be confident technology users with high expectations of what the Internet can deliver. The challenge for arts organisations will be to satisfy the needs of this new, technologically savvy audience. This is not to say that older arts attenders, who are now increasingly familiar with technology in their working lives and outside of the workplace won't have equally high expectations.

Design

Most organisations appear to be undertaking a degree of graphic design (77%) and desktop publishing (46%) in-house. The majority (77%) are also producing PDF (Portable Document Format) files that are viewable and printable on any platform, enabling them to share and distribute information, particularly online.

Websites

Almost all (95%) of the RFOs audited have a web presence; a third of these RFOs have been online for at least six years. Most RFOs don't host their own websites, 68% of RFOs websites are hosted externally. Few of the RFOs are entirely self-sufficient when it comes to designing and updating website content, only 22% design AND update their sites without any external assistance. This may be due to lack of specialist IT staff or skills gap amongst other staff but lack of autonomy may cause problems with website development.

We don't have an IT specialist on the staff. We have had disappointing experiences of working with web designers and maintaining the website.

The websites of almost two thirds of the audited RFOs have undergone major re-developments since they were launched and a similar proportion have further re-developments planned over the next three years. In terms of development, a greater proportion of visual arts organisations (91%) are planning changes compared to 66% of performing arts organisations. It seems therefore that that RFOs are investing in their online capability but are they doing this strategically?

Only 35% of the RFOs with websites were able to return figures on the number of hits recorded on their site during the last financial year; less than one in five (19%) monitored the number of users to their sites during this time. Almost half the RFOs surveyed don't gather any information on how visitors to their websites are using them. All this means that the organisations have no knowledge of how visitors are navigating through the sites, how many people are accessing the site, which pages are popular, how many are downloading files, how many are listening to audio and watching video. If there is no information on current use, what is the basis for planning future developments?

82% of RFOs don't have data on the profile of virtual visitors – they don't know if their sites are attracting potential as well as existing audiences, if they are attracting a younger audience through their online presence. This lack of 'market information' or intelligence is not just an online phenomenon, 67% of RFOs don't have data on their 'actual' visitors either.

Interviewed organisations who have recently been through an Arts Council England led stabilisation or recovery process reported plans for new marketing manager posts; and the development of marketing strategies being produced once the staff team had been expanded.

We need new staff to come and work out exactly who the audience are.

e-mailing Lists and SMS

The audit indicates that to date, most of the RFOs websites have developed as static electronic sources of information: 93% of websites include background information on the organisation, 75% have information about the venue. Most (92%) of the visual arts organisations display images of art, though only 29% of performing arts websites do so.

The majority of the RFOs websites have a function enabling visitors to contact the organisation, though at present, visitors to RFO sites can only sign-up to a mailing list on 57% of the websites. This is planned as

one of the main areas of development for the RFOs sites, with a further 30% of RFOs intending to introduce this function.

RFO sites presently offer little opportunity for audiences to communicate with each other online, only 16% have discussion forums. Again a significant number of RFOs (34%) are planning to introduce discussion forums on to their sites.

Through the development of mailing lists and forums, there is clearly a move towards using websites as a means for RFOs to start building relationships and developing a dialogue with their audience.

Only one in three of the RFOs have consulted their audiences to explore what their audiences actually expect or want in terms of digital communication. Despite not having a measure of what audiences want in terms of SMS or e-mail communication, 90% of RFOs are collecting audiences' e-mail addresses and 58% are gathering audiences' mobile numbers. 72% of RFOs have built an e-mailing list of individuals with at least some segmentation, 43% of the RFOs with an e-mailing list allow members to choose the information that they want to receive. In addition, 67% of the RFOs differentiate the messages that they send to different parts of the list. However, it is not possible to determine from the audit if this differentiation extends further than the areas of interest indicated by members when they joined the list.

The two main functions of the e-mail communication is the mailing of information about individual shows (91%) and to invite members to events (64%). Again, it is not possible to determine from the audit if this information is simply an electronic version of marketing print or whether it includes additional digital elements. Electronic communication with audiences mainly takes the form of e-mail (81%), although organisations are also developing and distributing e-flyers (52%) and newsletters (57%). Interviews revealed mixed attitudes - based on anecdotal evidence rather than fact from market research - about whether or not electronic communication was worth investing in:

I think that audiences' expectation will be raised over the next few years as IPTV is offered, and people get better content via mobile.

It's part of this age group's [13-30] expectations – it's a massive part of their social life and work.

We prefer to build personal relationships with our local audience.

Most audience members want the paper flyer. Our younger audience want info by text message.

Our email news shots have been ineffective.

No one has suggested doing more than the leaflet, which they're happy with.

Only 6 people sent in their email address, requested via a slip in a brochure mailshot of 1500.

Arts Magnet's 2004 research into the online capability of the NW demographic and arts audiences showed a surprisingly high general level of connectedness (57%) amongst all age groups, with information gathering habits becoming more common via digital devices. However, interviews proved that the current activity provided for this connected general NW population is limited: arts organisations that *do* have up-to-date market research on who their audiences are only aspiring to make the e-services and digital content available that *they* consider appropriate for their particular audience demographic. For example, organisations serving a younger demographic made creative content around certain shows and events available online, and marketed events via SMS; organisations serving a 40 yrs + demographic tended to just provide email newsletter content that they felt, anecdotally, was suitable.

Rather than finding out how digitally capable our audiences actually are and asking them what digital content they want from us; we're making assumptions about our audiences' technology levels, and giving them content that we think they should receive according to those assumptions.

Interactivity

In terms of providing audiences or visitors with a means to engage more interactively with their sites, only a few of the RFO websites provide visitors with either an option to watch video (14%) or listen to audio (22%). The audit does not provide any detail on the nature of these digital elements, but they could include samples of audio or video developed as 'tasters' for audiences to listen or watch a performance or event before making the decision to attend. Two recent surveys carried out by Morris Hargreaves McIntyre indicate that there is a clear demand for this type of function among existing arts audiences. 60% of attenders at contemporary music festivals in Scotland said that they'd visit a website to listen to a sound clip of an artist who they would then go to see perform live at the festival itself, 54% of current attenders at the Royal Northern College of Music also said they'd like to be able to listen to a performance online before making the decision to attend.

Online audio may also include podcasts of performances, though some organisations expressly stated that they didn't want to develop this aspect of their websites, preferring only to provide audiences with 'studio quality' recordings. This area of development may also be restricted to a certain extent by legal and copyright limitations.

When asked about the development of their websites, many organisations expressed an aim or desire for their sites to be more 'interactive'. Data on the proposed development of RFO websites indicate that many are intending to achieve this interactivity through the inclusion of audio or video content on their sites. 41% of RFOs are planning to introduce video and 39% intend to add audio to their sites.

The main priorities for website development amongst artistic directors is the incorporation of interactive content, either standalone artistic interactive content (33%) or interactive content linked to artistic activity (34%). Despite having plans to develop their websites, particularly the interactive elements, only 35% of RFOs have as yet identified specific funds to implement these developments. Funding for the proposed developments, though not specifically earmarked as yet, will be drawn from a number of funding streams including core funds (51%), project funds (62%), partnership (31%) and sponsorship (17%).

From the interviews, there were clear indications of aspiration at artistic director level to provide a level of new technology-generated interactivity for the audience, both with the functions of the organisations' business (e-marketing; e-ticketing; digital customer relationship management); and their art. For 20% of organisations, particularly those concentrating on contemporary practice, or those with young audiences: producing digital content designed to encourage high levels of virtual interactivity "seems natural", and was "no conscious decision at all".

Distribution

Use of the Internet as a means of distributing art is limited, only 14% of RFO websites have downloadable audio files and only 5% currently include downloadable video. Whether organisations view the distribution of art in this way as a means to an end or as an end in itself, very few are using, or planning to use the Internet as a means of delivering their work to a wider audience. Only 17% of RFO are planning to include downloadable audio on their sites and just 6% have plans to include downloadable video in the future.

Online retailing activity is low, particularly given the growth in downloadable music sales that has taken place since Apple launched the iTunes Music Store in 2003. In three years, over one billion tracks have been sold through iTunes, with Apple's success prompting Amazon and Google to plan the launch of their own music stores. This growth is not reflected in the extent of RFOs activity in online sales, either for ticketing or for sales of audio, video, art or other merchandise.

Only 12.5% of the RFOs in the North West (14 organisations) offer any online ticketing - all of these being performing arts organisations. However, these organisations only represent 27% of all the performing arts RFOs in the North West. The audit does not include a detailed breakdown of this online ticketing activity i.e. whether venues have computerised ticketing systems and online real-time ticketing that is integrated with their box office or simply provide an allocation of tickets for a ticket agent such as Ticketmaster to sell tickets over the Internet.

More detail on online ticketing activity is included in a *Feasibility Study into Integrated Online Ticketing in Greater Manchester* carried out by Beth Aplin and Roger Tomlinson in 2005. Their report found that only five member organisations of Arts About Manchester were managing online ticketing direct from their own systems. In the study, enabling venues to achieve 'real-time' ticketing was cited as the first step in achieving integrated online ticketing in the region. One year on from their research, organisations providing online ticketing remain the exception rather than the norm in the North West.

Creation of art

There is clearly a strong commitment amongst RFOs to produce digital art – 82% of artistic directors stated that the creation of digital content around artistic activity fitted in to the artistic vision for their organisation. This figure included 100% of visual arts organisations but only 76% of performing arts RFOs. This commitment is reinforced by the belief that audiences are interested in engaging with digital content created around an organisation's artistic activity:

Our audience will and can come together after interacting with the art form and each other online.

From page impressions, more audience are looking at what we are doing online than are attending events.

Technology development is needed for the development of the global artist network. Looking ahead, we need to be able to format content into different languages.

The commitment to the development of digital art however is not backed up by the allocation of funds within the RFOs. Only 36% of RFOs have funding set aside for the creation of digital content. Despite, or possibly because of the funding restrictions, more than 50% of RFOs have developed partnerships with other organisations or artists to help them develop digital content.

Lack of a budget allocation may also account for the fact that despite 82% of artistic director being committed to developing digital art, only 47% of RFOs are currently creating digital content around core artistic practice and 56% are using digital content to support elements of their programme. There is clearly a gap between commitment levels and actual activity within the RFOs that could be related to a funding, staffing and knowledge shortfalls but may also in some part be related to the priority given to IT and digital content within the RFOs.

Interviews corroborated these results. Arts organisations have in general identified that they need to be able to provide 21st century-appropriate marketing, sales channels and content. 70% talked in detail about great digital content or e-marketing ideas that they COULD develop. Organisations with young members of staff in particular have well-developed ideas, and ideas that are appropriate to the particular art form. The ideas are mentioned in strategic planning documents, but funds are not necessarily put aside to develop them.

These younger members of staff, or staff with a particular interest/high level of skill in new technologies have responsibilities for considering new technology development within their job descriptions. Conversely, SMT and chief execs/artistic directors do not. One explanation for this might be that younger people have grown up with new technologies around them, and therefore naturally have a higher level of skill and awareness that they can bring to a post. Arts organisations are building their IT awareness and skill base by accident of their younger staff's inherent skills.

In general, the new technology and digital content plays SOME role within the output of the NWs arts organisations. However, most organisations have strength or a large amount of activity in just ONE area, rather than a spread of strength across all areas. The table below shows quotes from artistic directors interviewed discussing the levels of

new technology (hardware, software, equipment) and digital content in the different areas of their organisations:

Table 2: Current activity reported in interviews

Department or area of work	Current use of new technology?	Current use of Digital Content?
Artistic and Creative output	<p>“Use a lot of video technology, digital content in the work that we make. Also work received has a high percentage of new technology demand”.</p> <p>“Forums on website”.</p> <p>“Some new technologies used in artists’ residencies in studios”.</p> <p>“Much recording, and co-producing digital radio/music work with YP via new digital recording equipment”.</p> <p>“We have a central bank of data that is built on a bespoke access database, held on a server, so accessible remotely. This helps the whole of the organisation: it shows where we are up to with budgets; programming; and it runs the schedule”.</p>	<p>“Really have an expansive view about how digital content can be defined as part of the creation of artistic work”.</p> <p>“Digital discussion tools used to shape the creative output and artistic direction”.</p> <p>“Digital content is co-produced with workshop attendees.”</p> <p>“Some interactive content (downloadable)”.</p> <p>“We’re not interested in technology for the sake of it”.</p> <p>“We don’t initiate digital content as a receiving house. Reliant on “suppliers” for digital content we could use.”</p> <p>“The website has been used as a virtual exhibition space – a tour around the spaces”</p> <p>“We’re going to</p>

	<p>“The drop in the cost of technology has allowed us to create our own record label. The web has enabled better distribution – direct sales and via affiliates.”</p> <p>“Digital recording of music that is created has been done for a while”.</p>	<p>produce “video diaries”: video projects which will be projected as an “introduction” to the live work, before the live performance on the main stage.”</p> <p>We have some digitised archive materials, but no interpretation or contextual information around it”,</p> <p>“We have produced some digital work – a DVD was put out with a catalogue. It included the video installations, critics discussing, and artists introducing the work.”</p>
<p>Sales and Marketing</p>	<p>“Not much demand from touring companies – they tend to play it safe by assuming that the venue might not be able to execute new technology based work or marketing.”</p> <p>“We have captured some info and emails from our booking system”.</p> <p>“Straight listings and info. Have done some experiments with texting audiences – we are trying to develop a text mailing list.”</p>	<p>“We’re in a state of transition with the current website. Has been used to provide a web based experience, a feeling of the organisation.”</p> <p>“Virtual tour, marketing the programming”.</p>

	<p>“We have an online booking system which they are just beginning to use to its full potential.”</p> <p>“We make some SMS contact with our audience, but otherwise all events are small (workshops). Tickets are sold manually – we take small amounts of cash for workshops, so no credit card transactions or data capture in place. Postal mailing lists allow for some targeted mailings.”</p> <p>“We have an E-box office, but mainly informational website. Direct email shots can link recipients to tracks of our recordings on the website.”</p> <p>“Our online shop increased sales by 50% in 6 weeks”.</p>	
Education	<p>“New technology requirements are different on a project by project basis, often its brought in by touring companies.”</p> <p>“All our workshops involve new</p>	<p>“Some shows have had an educational element that was digital content based”.</p> <p>“Our educational workshops produce digital content”.</p> <p>“An educational interactive CD ROM is</p>

	<p>technology.”</p> <p>“Education Dept have worked with Arts Magnet to make an online game”. We didn’t buy the technology equipment though.”</p> <p>“Digitise teachers packs for wider distribution.”</p>	<p>being planned”.</p> <p>“We use digital content in our education department for specific projects, but not much on the website.”</p> <p>“Some education content is available for download, but we do want to develop the education work to have a higher level digital content.”</p> <p>“Our curatorial content is available online.”</p>
Administration	<p>“We’re part of the local council, so we have well developed technology. We use <i>Artifax</i> room and event booking system, and have an intranet.”</p> <p>“We use MS Office applications to share resources and organise.”</p> <p>“Our development department use software to track giving habits, library uses <i>Sibelius</i> software to prepare parts from the score, etc.”</p> <p>“We have standard office computer systems, some</p>	<p>“We have an in-house part-time archivist who makes digital video and DVD records of our work.”</p>

	databases, and the internet is used for research especially.”	
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Most organisations interviewed have one department (or area of work within a smaller organisation – creative output; sales and marketing; education; or administration) that is the strongest. This is usually because the organisation’s new technology “champion” works particularly in this area; however all organisations expressed the desire to ensure that their approach to new technologies and digital content was integrated across all departments. One artistic director summed up how the sector seems:

We’re inbetweeny – semi developed in everything. Website, online ticketing, e-marketing. It seems we’re lacking the nerve to go for it entirely. When do you take the leap?

Other reasons for arts organisations being only semi-committed or partially bought in to developing new technologies and digital content given by artistic directors in interviews were:

...there’s no research that proves the tipping point of new technology has happened amongst arts audiences.

Even the most technologically advanced organisations – those funded to be the digital and 21st C flagships – still send out paper brochures. If the Joneses aren’t doing it, why should the Smiths?!

Organisations who had ACE positive interactions with ACE officers about IT/digital content investment have done more work, and applied for money to develop content and experiment with technologies. About half the interviewees mentioned that support from ACE officers has helped them feel that their strategic contemplation, and planning development in this area is worthwhile for their arts organisation.

Headline Conclusions

With the regional average being slightly less than one computer per staff member, in general terms, the use of IT for administrative functions is universal. But its potential for engaging and developing audiences, selling, distributing and creating digital art are far from realised. Adoption is reactive rather than proactive, once the need is proven.

Over 80% of RFOs reported the main barrier to IT and digital content development as being funding. Over the next year, exceptional expenditure on IT is planned by RFOs, but the investment is to upgrade existing systems and software rather than to support major new developments in IT and new media capability. Exceptional expenditure is not planned to cover the production costs of digital content (staff time, digital rights management, recording, publishing, etc.).

The visual arts sector is doing slightly better than the performing arts at having a strategic approach to IT deployment and significantly better at distributing digital content (92% of visual arts organisations' websites display images of art; only 29% of performing arts websites do so – this statistic has the caveat that performing arts organisations perhaps want to show off their interactive live content in an interactive digital format - video/audio clip – and this is more complicated and expensive to achieve than presenting images).

100% of artistic directors of visual arts organisations stated that the creation of digital content around artistic activity fitted into their artistic vision. 76% of performing arts RFOs reported the same commitment. However this commitment is not backed up by allocation of funds – only 36% of RFOs have funding set aside for the creation of digital content.

Some organisations do not consider digital content relevant at all; others assume that audiences will not be interested; but in most cases there is evidence of consideration of digital content.

Digital content projects happen in isolation; e-business skills and knowledge are built up in some departments in some organisations, but this rarely cross-fertilises across the whole organisation.

Levels of IT and digital content creating skills amongst staff in smaller organisations are actually quite high. Interviews proved that the NW's RFOs are encouraging internal discussion and expansive and imaginative thinking around how best to development digital content. Younger staff in particular, are bringing their life experience to the arts organisation that they work at, and are applying their innate knowledge

about what people want to do with digital content to the art forms they work within. How the sector ensures that

- this knowledge does not grow stale; and
- the knowledge and ideas are listened to, adopted across the organisation and given budget and wings to grow

are amongst the challenges that this report reveals.

Many arts organisations feel that their IT and digital content capabilities are semi-developed in all areas of activity (artistic/creative output; sales and marketing; education; administration).

Artistic directors talked of “lacking the nerve” to make any further leap, and many felt that there was no evidence that a “tipping point” had been reached (no arts organisations they can look to as early e-business or digital content adopters, so no proof that audiences may respond).

It is a vicious circle where organisations want to look to early adopters for proof of a new way of working, but don’t want to risk stretching already tight budgets to be the early adopters themselves. Organisations are too afraid to be the first to make the leap.

Our mainly older audience will change habits over time, but haven’t yet, so no pressure to make the change.

As artists become more interested in commenting about the new technology that is in our lives, then they’ll start reflecting it in their shows: that’s when we as the art venue will need to react.

The arts have remained an introverted sector, rarely looking outside to the commercial world or elsewhere for comparison; inspiration; or new practices. This reticence to look outside the sector for comparables has caused elements of sector bad practice. For example, let us consider our sector’s lack of website and email newsletter interactivity. People living in the 21st century expect personalisation and dialogue from the organisations they engage with. (Think about how e-newsletters from airlines promote flights from airports local to you; how The Guardian or BBC online allow you to choose which areas of content you would like emails sent from them to contain). The arts sector – which prides itself on modernity and relevance, and where people expect a debate and to be challenged – is generally providing digital resources that can not be personalized: they do not communicate openness and responsiveness to customer (audience) preference.

With less than 1 in 5 organisations measuring the number of users on their site over the last financial year, and 82% of RFO's being without data on the profile of their virtual visitors, improving low levels of visitor data collection and the quality of the research on expectations would also help the sector become more intelligent about providing what audiences need, perhaps even what they want. (Rather than go into further detail here in this report on the position of the arts in relation to personalisation, please refer to John Knell's extensive and recently published report, "Personalisation in the Arts"⁵).

The lack of response within the sector to "go for it" digitally can also be blamed on this self-perpetuating situation: arts organisations tend to compare between themselves rather than against other sectors. So when no one organisation can be seen to be taking the lead, or proving that "making the leap" is worthwhile, everyone else assumes its too risky.

Interviewees suggested a few ideas that might help alleviate this situation. One artistic director thought that a fund for solely website development would give confidence to people, and prove that trends are going in that way: so much so that activity in this area would be underpinned by a fund.

The audit has revealed that there are a number of organisations who would like to be a part of any new initiatives for new tech/digital content development; and who would be prepared to collaborate with other organisations to share resources. At least five of the NW organisations interviewed expressed enough interest to be part of a pilot project that aimed to help organisations develop IT and digital content capacity.

Overall, the data points to there being a lack of formal strategic planning in relation to RFOs' IT and digital content creation capability. Although the artistic directors interviewed reported that these matters are discussed at strategic and senior levels, strategic documentation does not as a matter of ordinary practice, formally report verbal plans. Boards, trustees and funders are not made formally aware of the importance of IT and digital content aspirations in plans (development and funding plans do not contain adequate capacity and budgets to achieve them).

⁵ Commissioned by ACE national office, 2006.

APPENDICES

APPENDIX A: Raw data output from questionnaires

Artistic Director Questionnaire

Q2 Year Established		
Base		83
		100.00%
	Less than 5 years	3
		3.60%
	5-10 years	19
		22.90%
	11-20 years	24
		28.90%
	21-30 years	20
		24.10%
	More than 30 years	17
		20.50%
Q7 Does your organisation have a written IT strategy?		
Base		83
		100.00%
	Yes, only for administrative functions	11
		13.30%
	Yes, only for artistic functions	2
		2.40%
	Yes, for administrative and artistic functions	5
		6.00%
	No	64
		77.10%
	No response	1
		1.20%
Q8 Does producing creative digital content around artistic activity fit into your artistic vision?		
Base		83
		100.00%
	Yes	68
		81.90%
	No - why?	9
		10.80%
	Not sure - why?	5
		6.00%
	Not applicable	1
		1.20%
Q9 Do you think your audiences would be interested in digital content around your artistic activity?		
Base		83
		100.00%
	Yes	69
		83.10%
	No - why?	1
		1.20%
	Not sure - why?	9
		10.80%
	Not applicable	2
		2.40%
	No response	2
		2.40%
Q10 Is funding put aside for creative digital content?		
Base		83
		100.00%
	Yes - how much?	28
		33.70%
	No	52
		62.70%
	No response	3
		3.60%

Q11 Do any other arts organisations/artists help you/partner you to develop digital work?		
Base		83
		100.00%
	Yes - who?	41
		49.40%
	No	38
		45.80%
	No response	4
		4.80%
Q12 Is any digital content created around core artistic practice/		
Base		83
		100.00%
	Yes - what?	35
		42.20%
	No	40
		48.20%
	No response	8
		9.60%
Q13 Is digital content developed to support elements of your artistic programme?		
Base		83
		100.00%
	Yes	44
		53.00%
	No	35
		42.20%
	No response	4
		4.80%
Q15 What are the barriers to the development of IT at your organisation?		
Base		83
		100.00%
	There are no barriers	2
		2.40%
	Funding	76
		91.60%
	Lack of staff time	64
		77.10%
	Lack of staff skills	52
		62.70%
	Lack of knowledge/understanding	21
		25.30%
	Lack of interest	2
		2.40%
	Other - please specify below	1
		1.20%
Q16 What content do you have on your website?		
Base		83
		100.00%
	No response	11
		13.30%
	Overview of venue	40
		48.20%
	Special projects	59
		71.10%
	Stand alone artistic interactive content	13
		15.70%
	Education/community projects	43
		51.80%
	Interactive content linked to artistic activity	16
		19.30%
	Information about events and activities	70
		84.30%
	Information about past events	57
		68.70%
	Other	16
		19.30%

Q16 What content do you have planned on your website?		
Base		83
		100.00%
	No response	39
		47.00%
	Overview of venue	9
		10.80%
	Special projects	12
		14.50%
	Stand alone artistic interactive content	29
		34.90%
	Education/community projects	19
		22.90%
	Interactive content linked to artistic activity	29
		34.90%
	Information about events and activities	7
		8.40%
	Information about past events	10
		12.00%
	Other	10
		12.00%
Q16 What content will exist in the future?		
Base		83
		100.00%
	No response	3
		3.60%
	Overview of venue	49
		59.00%
	Special projects	71
		85.50%
	Stand alone artistic interactive content	42
		50.60%
	Education/community projects	62
		74.70%
	Interactive content linked to artistic activity	45
		54.20%
	Information about events and activities	77
		92.80%
	Information about past events	67
		80.70%
	Other	26
		31.30%
Q17 Have you identified funds to implement these developments?		
Base		83
		100.00%
	Yes	30
		36.10%
	No	34
		41.00%
	Not making developments	8
		9.60%
	No response	11
		13.30%
Q18 How will these developments be funded?		
Base		64
		100.00%
	Core funds	33
		51.60%
	Project funds	39
		60.90%
	Partnership/In kind	20
		31.30%
	Sponsorship	11
		17.20%
	Other - please specify	8
		12.50%
	No response	5
		7.80%

Q19 Do you have access to the necessary skills/experience ayour organisation to implement these developments?		
Base		64
		100.00%
	Yes, in-house	27
		42.20%
	Yes, through partnership/in kind	14
		21.90%
	Yes, subcontracted	34
		53.10%
	No	10
		15.60%
	No response	2
		3.10%
Q20 In comparison with others in your sector, do you think your organisation is ...		
Base		83
		100.00%
	Makes more artistic use of IT/multimedia/digital content - why?	15
		18.10%
	Makes similar artistic use of IT/multimedia/digital content	38
		45.80%
	Makes less artistic use of IT/multimedia/digital content - why?	23
		27.70%
	No response	7
		8.40%

Marketing Staff Questionnaire

Q3 Do you have a website?		
Base		81
		100.00%
	Yes	76
		93.80%
	No	5
		6.20%
Q5 When was your website launched?		
Base		76
		100.00%
	2005-2006	6
		7.90%
	2004-2000	39
		51.30%
	Before 2000	23
		30.30%
	No response	8
		10.50%
Q6 Has your website undergone major re-development?		
Base		76
		100.00%
	Yes	47
		61.80%
	No	29
		38.20%
Q7 When was your website re-launched?		
Base		47
		100.00%
	2005-2006	16
		34.00%
	2004-2000	24
		51.10%
	No response	7
		14.90%
Q8 Are there any any MAJOR re-developments planned?		
Base		76
		100.00%
	Yes - what?	50
		65.80%
	No	22
		28.90%
	No response	4
		5.30%
Q10 Is digital content developed to support elements of your programme?		
Base		81
		100.00%
	Yes	49
		60.50%
	No	28
		34.60%
	No response	4
		4.90%

Q11 What are the barriers to the development of IT at your organisation?		
Base		81
		100.00%
	There are no barriers	4
		4.90%
	Funding	71
		87.70%
	Lack of staff time	67
		82.70%
	Lack of staff skills	43
		53.10%
	Lack of knowledge/understanding	22
		27.20%
	Lack of interest	1
		1.20%
	Other - please specify below	3
		3.70%
Q12 What are the existing functions on your website?		
Base		76
		100.00%
	No response	4
		5.30%
	Sign-up to mailing list	42
		55.30%
	Listen to audio	16
		21.10%
	Watch video	10
		13.20%
	Participate in forums	12
		15.80%
	Download documents	50
		65.80%
	Download audio	10
		13.20%
	Download video	4
		5.30%
	Purchase audio	5
		6.60%
	Purchase video	6
		7.90%
	Purchase tickets	11
		14.50%
	View art	35
		46.10%
	Download art	6
		7.90%
	Purchase art	8
		10.50%
	Purchase art	16
		21.10%
	Venue information	55
		72.40%
	Education resources	26
		34.20%
	Background info	67
		88.20%
	Contact us	69
		90.80%

Q12 What functions are planned?		
Base		76
		100.00%
	No response	24
		31.60%
	Sign-up to mailing list	24
		31.60%
	Listen to audio	30
		39.50%
	Watch video	31
		40.80%
	Participate in forums	25
		32.90%
	Download documents	7
		9.20%
	Download audio	13
		17.10%
	Download video	5
		6.60%
	Purchase audio	5
		6.60%
	Purchase video	4
		5.30%
	Purchase tickets	6
		7.90%
	View art	6
		7.90%
	Download art	4
		5.30%
	Purchase art	1
		1.30%
	Purchase art	14
		18.40%
	Venue information	4
		5.30%
	Education resources	14
		18.40%
	Background info	3
		3.90%
	Contact us	5
		6.60%
Q13 Do you have ticketed events?		
Base		81
		100.00%
	Yes	39
		48.10%
	No	42
		51.90%
Q15 Do you have plans to upgrade or change your ticketing system in the next 12 months?		
Base		39
		100.00%
	Yes	9
		23.10%
	No	25
		64.10%
	No response	5
		12.80%
Q19 Do you charge a booking fee for online bookings?		
Base		11
		100.00%
	Yes - how much?	9
		81.80%
	No	2
		18.20%

Q21 Do you collect information on how visitors use the site?		
Base		76
		100.00%
	Yes - through WebStats	31
		40.80%
	Yes - through audience surveys	11
		14.50%
	No	36
		47.40%
	No response	3
		3.90%
Q22 Do you collect information on the profile of visitors to your website?		
Base		76
		100.00%
	Yes - through online surveys	8
		10.50%
	Yes - through other audience surveys	9
		11.80%
	No	59
		77.60%
	No response	4
		5.20%
Q23 Do you have comparable information on the profile of actual visitors?		
Base		76
		100.00%
	Yes	23
		30.30%
	No	46
		60.50%
	No response	7
		9.20%
Q25 Have you surveyed your audiences to test if they would like to hear from you via digital device		
Base		81
		100.00%
	Yes	29
		35.80%
	No	48
		59.30%
	No response	4
		5.00%
Q26 Would you be willing to share data on consumption and attitude to e-communications?		
Base		29
		100.00%
	Yes	16
		55.20%
	No	11
		37.90%
	No response	2
		6.90%
Q27 Do you collect e-mail addresses and mobile numbers from your customers?		
Base		81
		100.00%
	Yes, routinely collect e-mail addresses	48
		59.30%
	Yes, sometimes collect e-mail addresses	25
		30.90%
	Yes, routinely collect mobile numbers	13
		16.00%
	Yes, sometimes collect mobile numbers	34
		42.00%
	Don't collect e-mail	7
		8.60%
	Don't collect mobile numbers	17
		21.00%
	No response	1
		1.20%

Q28 Does your organisation have an e-mailing list of individuals?		
Base		81
		100.00%
	Yes	58
		71.60%
	No	23
		28.40%
Q30 Can people on the mailing list choose what they want to receive?		
Base		58
		100.00%
	Yes	25
		43.10%
	No	30
		51.70%
	No response	3
		5.20%
Q31 Do you send different messages to different sections?		
Base		58
		100.00%
	Yes	39
		67.20%
	No	16
		27.60%
	No response	3
		5.20%
Q32 Which of the following is sent to contact on the list?		
Base		58
		100.00%
	e-mail	47
		81.00%
	e-flyer	30
		51.70%
	Newsletter	33
		56.90%
	Other	6
		10.30%
	No response	2
		3.40%
Q33 How is the e-mail delivered?		
Base		58
		100.00%
	Plain text	37
		63.80%
	html	36
		62.10%
	Link to webpage	17
		29.30%
	No response	2
		3.40%
Q34 What information is included in the e-mails which you send?		
Base		58
		100.00%
	Information on individual shows	53
		91.40%
	Information on similar shows	19
		32.80%
	Information on a full season	20
		34.50%
	Invitation to events	37
		63.80%
	Ticket offers	22
		37.90%
	No response	1
		1.70%

IT Staff Questionnaire

Q3 How many computers do you have?		
Base		80
		100.00%
	One	3
		3.80%
	Two or three	15
		18.80%
	Four to six	23
		28.70%
	Seven to 10	17
		21.30%
	11 to 25	11
		13.80%
	26-50	5
		6.30%
	51-100	2
		2.50%
	More than 100	1
		1.30%
	No response	3
		3.80%
Q4 What is the average age of your computers		
Base		80
		100.00%
	One	2
		2.50%
	Two	12
		15.00%
	Three	8
		10.00%
	Four	3
		3.80%
	More than five	2
		2.50%
	No response	53
		66.30%
Q5 Do you have any exceptional expenditure on hardware planned over the next 3		
Base		80
		100.00%
	Yes - what?	22
		27.50%
	No	57
		71.30%
	No response	1
		1.30%

Q6 What type of Internet connection(s) do you have?		
Base		80
		100.00%
	Dial-up	6
		7.50%
	ISDN	8
		10.00%
	1Mb Broadband	16
		20.00%
	2 Mb Broadband	36
		45.00%
	4 Mb Broadband	7
		8.80%
	Other - specify below	10
		12.50%
	No response	4
		5.00%
Q7 How widespread is broadband through the organisation?		
Base		80
		100.00%
	For box office	4
		5.00%
	For all administrative users	25
		31.30%
	For all users	58
		72.50%
	For customers (via wifi or public computer terminals)	5
		6.30%
	No response	3
		3.80%
Q8 Which of the following operating systems do you use?		
Base		80
		100.00%
	Windows XP	61
		76.30%
	Windows 2000	18
		22.50%
	Windows 98	10
		12.50%
	Mac OS X	37
		46.30%
	Mac OS9	12
		15.00%
	Linux	2
		2.50%
	Other - specify below	7
		8.80%
	No response	1
		1.30%

Q9 Which of the following types of software do you use?		
Base		80
		100.00%
e-mail browsers e.g. Outlook, Entourage		78
		97.50%
Word processing e.g. Word		80
		100.00%
Spreadsheets e.g. Excel		79
		98.80%
Database e.g. Access, FileMaker		74
		92.50%
Accounting & Finance e.g. sage, MYOB, Dosh		57
		71.30%
Project management e.g. Microsoft Project		16
		20.00%
Presentations e.g. PowerPoint		61
		76.30%
Desktop publishing e.g. InDesign, QuarkXpress		37
		46.30%
Graphic design e.g. Illustrator, Photoshop		63
		78.80%
PDF production e.g. Adobe Acrobat		62
		77.50%
Web design e.g. FrontPage, Dreamweaver		35
		43.80%
Web browser e.g. Explorer, Safari, Firefox		61
		76.30%
Photo library e.g. iPhoto		35
		43.80%
Video editing e.g. iMovie, Avid, Final Cut		37
		46.30%
Sound editing e.g.		24
		30.00%
FTP software e.g. Fetch		21
		26.30%
Media Players e.g. RealPlayer, WMP, iTunes		65
		81.30%
Q10 Do you have any exceptional expenditure on software planned over the next		
Base		80
		100.00%
Yes - what?		21
		26.30%
No		56
		70.00%
No response		3
		3.80%
Q11 Do you host your own website?		
Base		80
		100.00%
Yes		26
		32.50%
No		52
		65.00%
No response		2
		2.50%

Q12 Is your website database driven?		
Base		80
		100.00%
	Yes	25
		31.30%
	No	49
		61.30%
	No response	6
		7.50%
Q13 Do you have a Content Management System (CMS)?		
Base		80
		100.00%
	Yes	24
		30.00%
	No	29
		36.30%
	Don't know	24
		30.00%
	No response	3
		3.80%
Q16 Who is responsible for designing new pages for your website?		
Base		80
		100.00%
	Internal staff only	23
		28.70%
	External staff only	14
		17.50%
	Combination	40
		50.00%
	No response	3
		3.80%
Q17 Who is responsible for adding or updating content on your website?		
Base		80
		100.00%
	Internal staff only	45
		56.30%
	External staff only	5
		6.30%
	Combination	25
		31.30%
	No response	5
		6.30%
Q18 Do you have dedicated IT staff employed at your organisation?		
Base		80
		100.00%
	Yes	11
		13.80%
	No	69
		86.30%

Q20 Do you have a maintenance and technical support contract?		
Base		80
		100.00%
	Yes	36
		45.00%
	No, have resources in-house	23
		28.70%
	No - why?	21
		26.30%
Q21 Do you itemise your IT costs in your accounts?		
Base		80
		100.00%
	Yes	37
		46.30%
	No	41
		51.20%
	No response	2
		2.50%
Q23 Do you expect next year's expenditure on IT to be ...		
Base		80
		100.00%
	Significantly higher	11
		13.80%
	Slightly higher	18
		22.50%
	About the same	29
		36.30%
	Slightly lower	6
		7.50%
	Significantly lower	12
		15.00%
	No response	4
		5.00%
Q24 Which of the following does your organisation do? [Please...		
Base		80
		100.00%
	Internal IT training courses	17
		21.30%
	External IT training courses	30
		37.50%
	Training using online resources/books/CDs	23
		28.70%
	None of these	33
		41.30%
	No response	5
		6.30%
Q27 In comparison with others in your sector, do you think of...		
Base		80
		100.00%
	More technically advanced - why? [Please explain below]	10
		12.50%
	Equally technically advanced	50
		62.50%
	Less technically advanced - why? [Please explain below]	17
		21.30%
	No response	3
		3.80%

Q28 Which of the following statements BEST describes your org...		
Base		80
		100.00%
	Staff have good IT skills	22
		27.50%
	Some staff have IT skills gaps	42
		52.50%
	Many staff have IT skills gaps	15
		18.80%
	No response	1
		1.30%
Q29 What are the barriers to the development of IT at your organisation?		
Base		80
		100.00%
	There are no barriers	5
		6.30%
	Funding	69
		86.30%
	Lack of staff time	57
		71.30%
	Lack of staff skills	38
		47.50%
	Lack of knowledge/understanding	21
		26.30%
	Internal resistance	5
		6.30%
	Full potential of IT isn't recognised	14
		17.50%
	Other - please specify below	2
		2.50%
	No response	1
		1.30%

APPENDIX B: Success stories from arts organisations using new technology and digital content

Audience changing the way they buy tickets



Alan MacGregor, Marketing Director, The Lowry shared the following statistics:

- £42,000 worth of online ticketing sales in first fortnight (12% of BO)
- 61% were first timers, compared to only 32% first timers on via phone
- *mylowry* has 10,000 subscribers - over a third of existing audiences chose e-content over brochures

New audience, interacting only virtually



2004-2005, Watershed, Bristol:

- 400,000 audience through their doors
- 1.4m total audience
- 1.9 TB data downloaded: many audience experience art and Watershed OUTWITH venue
- Video podcasting content via iTunes

Audience changing the way they gather information



Last year we noticed a significant change in the way people find out about what we do. Traffic on our website increased by 230% to 2.5m hits per year.

Dave Moutrey, Director, Cornerhouse.

Arts organisations changing their marketing mix with digital content

- Pilot Theatre video podcasting trailers – via their website and via the iTunes store. www.pilot-theatre.com
- KQED video podcast, a weekly update/tour of what's on in the galleries around the Boston area
- Welsh National Opera are the first European Opera Company to create music and video downloads from recording their live performances. Says Carlo Rizzi, WNO's Music Director:

The Flying Dutchman downloads are part of a wider strategy to bring something extra to all our audiences – the regular opera goer who might want a memento of a great evening out in the theatre, or a newcomer who is intrigued to try something new, but wants a taster of what to expect. We are also really interested to see whether this will reach a younger audience.⁶

They also significantly support their administrative functions online, such as Press and PR, and fundraising (an online auction).
www.wno.org.uk

Arts organisations using digital content to enhance their distribution capacity

Many thanks to the audit interviewees for their recommendations of exemplar online resources within their art form, which help make up this list.

London Symphony Orchestra (LSO)

<http://www.lso.co.uk>

⁶ Reported in *Arts Professional*, Issue 117 13 March 2006.

LSO have invested a lot in their own record label, and as a result, have been very successful through e-commerce.

Tate

<http://www.tate.org.uk/servlet/BrowseGroup?cgroupid=99999995>

Tate host a large part of their collection as digital images online. These are described and tagged, as well as viewable on the “lightbox”, allowing users a close up and detailed experience they wouldn’t even get in the gallery, due to restrictions on how close an audience member can actually get to the work. To give free access to all, and to give “better than the naked eye” experience of the artwork through high resolution pictures which can be zoomed in on to see detail gives the Tate a fantastic educational resource, available globally.

The Poetry Society

<http://www.poetrysociety.org.uk/places/archive.htm>

The superb resource of the Poetry Archive - poems and recordings of them being read aloud – is available online for anyone prepared to sign up for online membership.

Show Studio

<http://www.showstudio.com>

Show Studio is an online fashion broadcasting project committed to showing the process of creativity – from conception to completion. Their work recording this creative process is entirely website based, but the project generates work through crossing art form boundaries and blending all sorts of digital files (eg. moving image and photography). This project shows the ways in which a website can be a centre for diverse creative activity.

Arts organisations using digital content to enhance their artistic output

Check out these great pieces of interactive digital content produced by arts organisations working in partnership with digital artists and digital industries companies commissioned by Arts Magnet.

Load the Lorry

Turn on your speakers! Help the Hallé Orchestra's orchestra manager pack up the instruments and unload them at the Bridgewater Hall - your listening skills will be required!

www.arts-mag.net/halle

Design your own SuperCity

Redesign the cities of the North! Design your own Supercity gives budding designers from ages 5 and over the chance to redesign the skyline in Liverpool, Manchester, Barnsley or Hull (originally part of the Will Alsop exhibition at Urbis).

<http://www.urbis.org.uk/general.asp?f=0&page=197>

Monstermaker

Students from Beaver Road Primary School, Didsbury, working with artist Rupert Griffiths created hundreds of Rorschach inkblots to be the basis of this live installation and online laboratory.

www.monstermaker.org.uk and www.arts-mag.net then type "monstermaker" into key word search box

Manchester Arts Venue 3DVRs

Tour around the Cornerhouse Cinema, Contact Cinema and Urbis - on your computer! Look out for the hidden interactive elements embedded in the tours, designed by digital multimedia artist Bart Izoard.

www.arts-mag.net then type "VR" into key word search box

e-attachment to Romantic Detachment

Grizedale Arts enhanced their *Romantic Detachment* project with this e-attachment by artist Garratt Phelan. It works as a fantastic web cartoon in it's own right, as well as a clever insightful story reflecting the journey and creation of Romantic Detachment. Rather than being "drawn by computer", this is an ink animated cartoon being experimented with as a piece of interactive digital content.

www.arts-mag.net then type in "Romantic" in the key word search box.

CityTraces

Contact Theatre, working with Graham Clayton-Chance and Juliet Ellis, created CityTraces, an eerie and powerful piece of web theatre to compliment their 2004 show, *Manchester*. CityTraces acted as an epilogue to *Manchester*, carrying the story on where the on stage version left off, and was also a prologue to the show's revival and development last autumn.

www.arts-mag.net/citytraces

Many shows that Contact Theatre produces in venue have high levels of new technology and digital content within them, reflecting the expectations of their 13-30 yr old audience. *Perfect*, a new play by Kate O'Reilly produced at Contact in 2004, had a major new technology element devised and embedded in the play during the rehearsal process. Participants of the Perfectly Unreal workshops were trained in computer generated animation, and their work became part of the set design. A show-specific "intrigue website" was set up to attract audiences. Via a game-like experience, users could design their own computer generated "Perfect Partner" (one of the themes of the show). The website worked as a straight-forward marketing mechanism for the show, but was also available online for a while after the end of the run for audiences to enter into dialogue, feeding back on their experiences. <http://www.contact-theatre.org>

Skid 180

Skid 180, a high energy multimedia theatre co-production between Arena Theatre Company and Contact Theatre is showing at Contact Theatre in Manchester 1-13 May 2006. Fusing video art, sound, poetry and live BMX action with a set design constructed of ramps and multiple screens, a contemporary urban fairytale about Manchester's BMX scene will unfold. The show has also made the most of current web phenomenon, MySpace, creating a marketing webpage for free. <http://www.myspace.com/SKID180>

APPENDIX C: Bibliography of further research

Gaby Porter+Associates' original *Arts on the Web Feasibility Study*, commissioned by ACE NW, 2002⁷.

- Shows low levels of technology uptake, and suggests a pilot of central services (Arts Magnet borne from this pilot).

www.arts-mag.net Market Research Report by Morris Hargreaves McIntyre, commissioned by Arts Magnet, 2004⁸

- Outlines levels of online connectivity in the NW and amongst NW arts attenders. Measured capability of RFO websites in relation to digital content. Also captured a picture of plans RFOs had for their websites for the following year. Comparing this research with the current IT audit, in 2004, only 4 out of 20 (20%) organisations had any level of digital content on their website. This figure, generated from measuring a limited number of organisations in Manchester can not be directly compared to the current level of 36%, as the current level was measured across the region. However, the figure is indicative of a slow rise in levels of digital content being produced.

Feasibility Study into Integrated Online Ticketing in Greater Manchester, by Roger Tomlinson and Beth Aplin, 2006 (commissioned by Arts about Manchester and Marketing Manchester)⁹.

Capturing Cultural Value¹⁰, 2004 and Cultural Value and the Crisis of Legitimacy¹¹, 2006 by John Holden of DEMOS

- new methodologies suggested for assessing cultural value via measuring community interaction and involvement in a number of different ways (including digital).

Personalisation in the Arts by John Knell - recently commissioned report by ACE National Office's 21st C arts organisations department (expected publication April 2006¹²).

Britain's Creativity Challenge¹³ by Charles Leadbeater, 2005.

⁷ Please contact Arts Magnet for a copy of this report.

⁸ *Ibid.*

⁹ Please contact Arts About Manchester for a copy of this report.

¹⁰ Available for download on an Open Access licence:
<http://www.demos.co.uk/catalogue/culturalvalue/>

¹¹ Available for download on an Open Access licence:
<http://www.demos.co.uk/catalogue/culturallegitimacy/>

¹² Via <http://www.artscouncil.org>

- notes that sector development concentrates on management and leadership skills, but calls for support for encouraging the sector to grasp new technologies:

Organisations that are not equipped to adapt to new technologies will find it harder to compete. Those that work with technologies confidently and creatively are more likely to open up new markets and create new services.

¹³ Skills for Business Series, A Creative and Cultural Skills Publication, 2005, available for download from:
<http://www.ccskills.org.uk/media/cms/documents/pdf/Creativity%20Challenge.pdf>.