Canada Council for the Arts

The Arts in a Digital World

Thematic Report

5. Barriers and Summary of Observations

Survey Data Report

February 2017

Prepared by

Nordicity

Prepared for

Canada Council for the Arts

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Thematic Report

5. Barriers and Summary of Observations

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1. Background

The Canada Council for the Arts' (Canada Council) has undertaken an initiative to understand how artists and arts organizations are adapting to creating, disseminating and making a living from the arts in a digital world. As part of that ongoing investigation, the Canada Council engaged Nordicity to conduct a survey of artists and arts organizations in Canada.

The data presented in this report is principally derived from the results of an online survey administered to Canadian artists and arts organization between May and July of 2016 – with many survey questions referring to respondents' activity in the last year. As they interact with digital technologies in different ways, separate questionnaires were administered to arts organizations and artists.

Overall, the survey gathered responses from 908 arts organizations and 2680 artists. This response represents about 25% of all arts organization and 23% of all (known) artists in Canada. While it is not possible to estimate a margin of error for arts organizations (as they do not adhere to a normal distribution), Nordicity estimates that the sample of artists is accurate to within 2% (19 times of 20).

The results of this research are divided into the following thematic reports:

- **Report 1**: introduces the research methodology and provides an overview of the respondents;
- **Report 2**: outlines respondents' overall use of technology;
- **Report 3**: details how digital tools are used at different stages of the creative process;
- **Report 4**: explores how respondents use data and perceive the return on investment of technology; and,
- **Report 5**: summarizes barriers to adoption and key observations.

Throughout the reports, data is presented with a number of top-line data filters, which are described below:

For arts organizations:	For artists:
▪ Respondents self-identified level of overall comfort with digital technologies as either "high comfort" and "low comfort;"	▪ Respondents self-identified level of overall comfort with digital technologies as either "high comfort" and "low comfort;"
▪ Size of organization is defined in terms of annual operating budget such that organizations with an annual operating budget of more than $250,000 are considered "large," and the remainder are considered "small;"	▪ Career stage categorizes artists practicing for fewer than ten years as "early career" and all others "late career;"
▪ Artistic discipline (where possible).	▪ Artistic discipline (where possible).

2. Barriers to Success

This thematic report summarizes the barriers to success identified by arts organizations and individual artists then concludes with a series of observations synthesizing the findings of the preceding thematic reports. Artists and organizations across all disciplines viewed access to various forms of funding, ranging from project funding to funding for technology upgrades, as the greatest barrier to success. **Following funding concerns, both groups indicated that use of staff time and the cost and pace of change represent significant challenges**. There were few significant

variations by discipline although organizations were more likely to focus on professional development than individual artists. From an equity perspective, survey results suggest that **access to digital technology that in preferred languages or accessible formats and with adequate broadband are not major barriers for the majority of survey respondents.**

2.1 Artists vs. Organizations

Key Findings

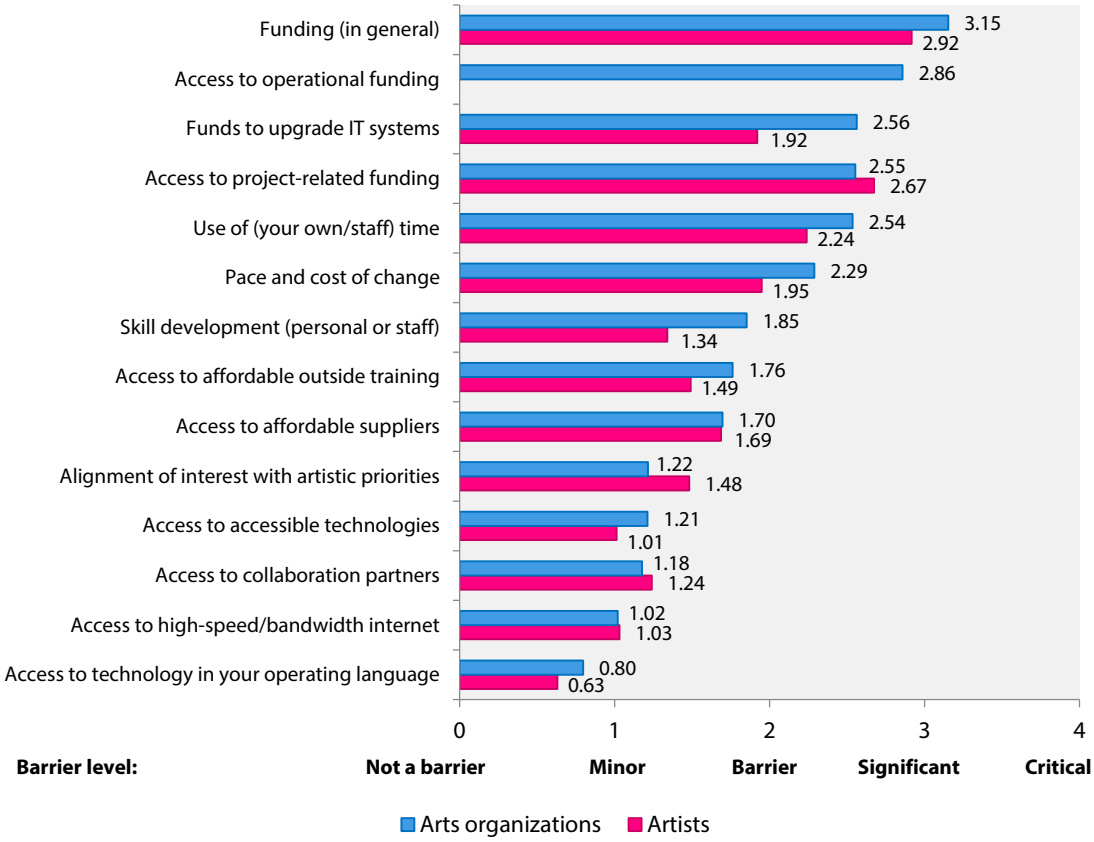
- Access to funding is the greatest barrier for artists and organizations
- Outside of funding, time management and cost and pace of change are significant barriers for both groups.
- Organizations perceive skills development and upgrades to IT systems as greater barriers than artists. This finding is even more pronounced among organizations that are smaller or less digitally comfortable.

With the exception of access to operational funding, artists and organizations were asked to categorize the same list of potential barriers, ranging from pace and cost of change to access to accessible technologies.

The following table compares the average scores reported by arts organizations and artists for each barrier to success. For both artists and arts organizations, access to different kinds of funding was the most significant barrier. While artists identified general funding and project funding as their biggest barriers, organizations emphasized general funding and operational funding.

Apart from funding concerns, artists and organizations both indicated that use of time and cost and pace of change are significant barriers. In contrast, the greatest difference between artists and organizations can be seen in funds to upgrade IT systems and skill development. In both cases, organizations were substantially more like to rank these factors as barriers.

Figure 1: Barriers to success (arts organizations and artists)[1]



n=3,074
source: Nordicity Arts in a Digital World survey (2016)

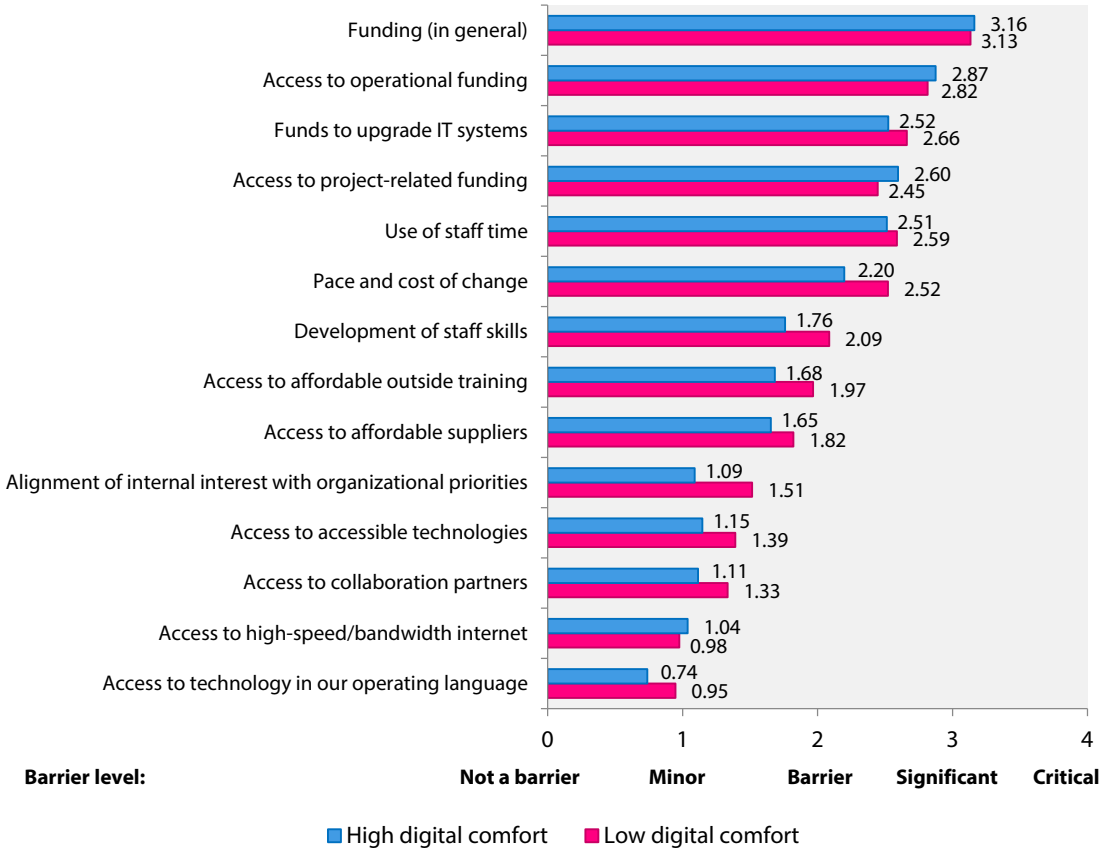
As can be seen above, the top three barriers for arts organizations are funding (in general), access to operational funding, and funds to upgrade IT systems. The bottom three barriers were access to technology in their operating language, access to high-speed internet, and access to collaboration partners.

The top three barriers for artists are funding (in general), project-related funding, and artists' use of time. The bottom three barriers were access to high speed internet, access to accessible technologies, and access to technology in artists' operating language. From an equity perspective, the latter finding is positive as it suggests that most artists are able to use digital tools in the format most appropriate to them.

The figure below shows that art organizations with low digital comfort are more likely than digitally comfortable organizations to cite development of staff skills, pace and cost of change, and funds to upgrade IT systems as barriers to success.

[1] Note that artists are not eligible for operational funding.

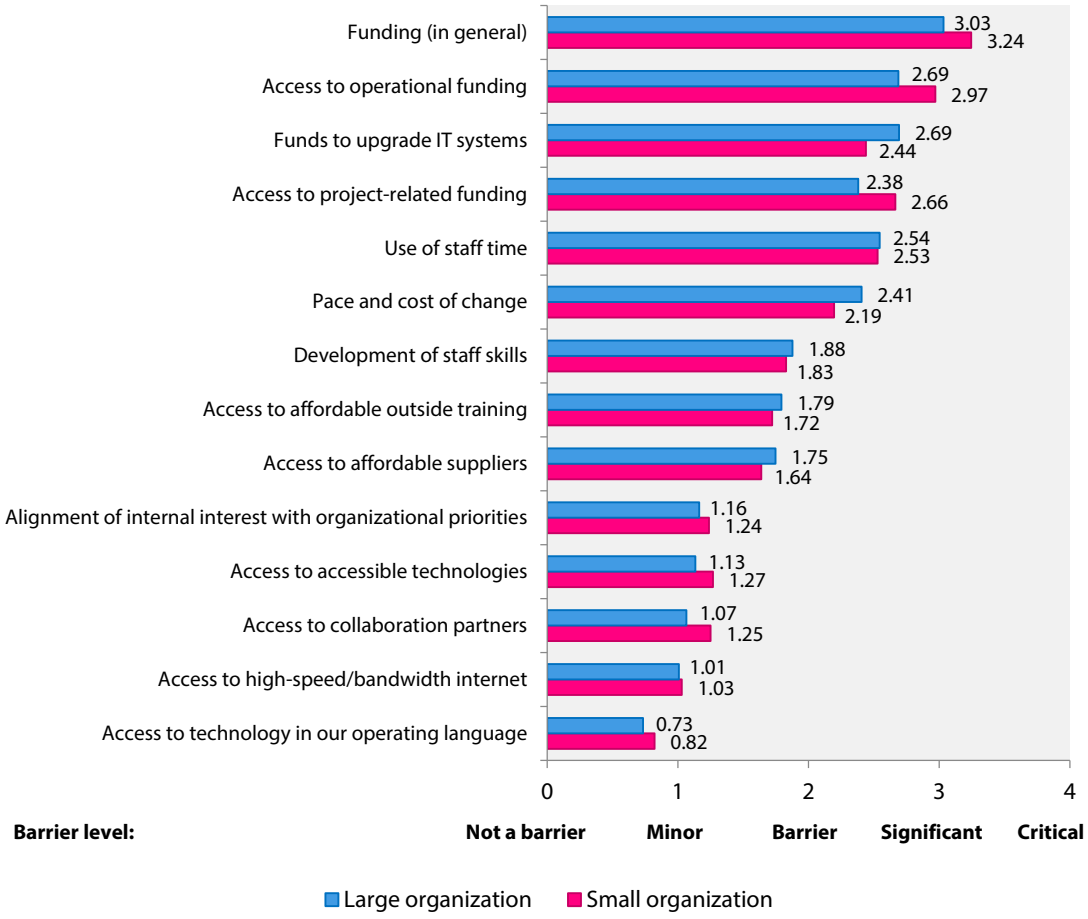
Figure 2: Barriers to success, by digital comfort (art organizations)



n=819
source: Nordicity Arts in a Digital World survey (2016)

The table below shows that large organizations are more likely than their smaller counterparts to be challenged by pace and cost of change, use of staff time and funds to upgrade IT systems. Small organizations, in contrast, more often cite funding-related issues as their most significant barriers to success.

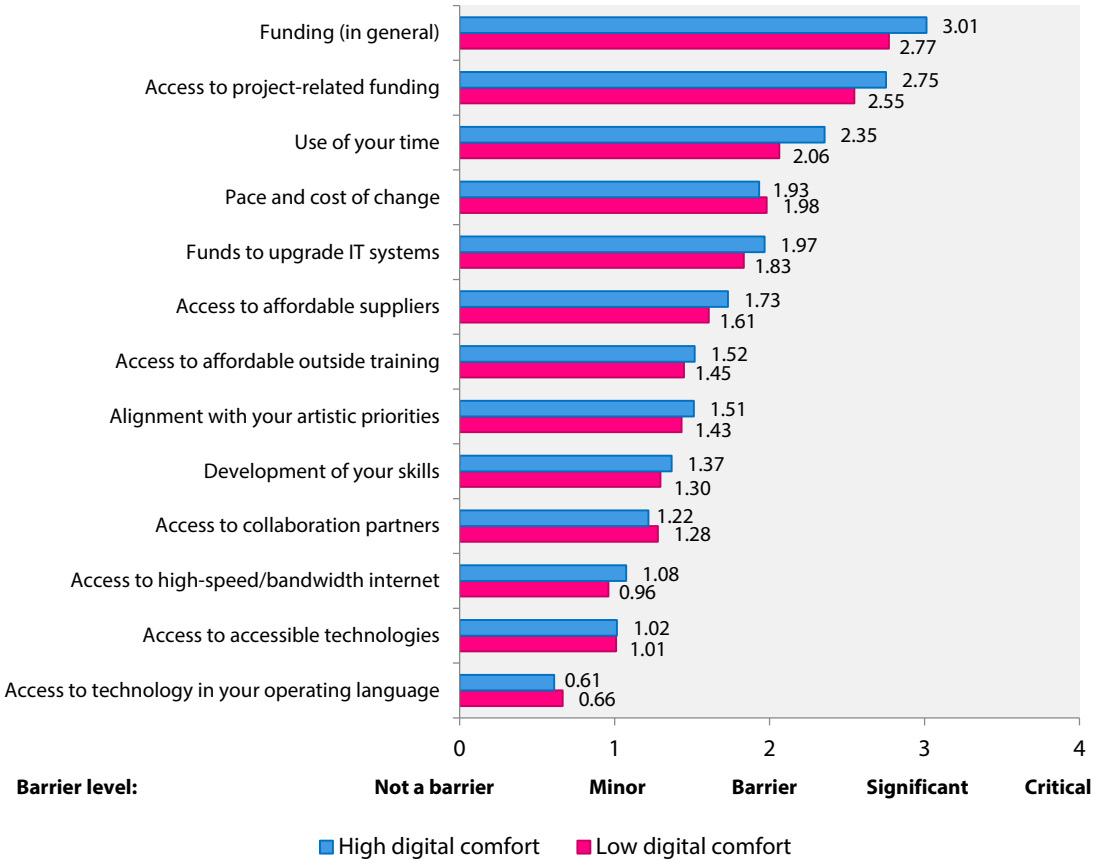
Figure 3: Barriers to success, by organization size (art organizations)



n=872
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows artists' responses broken out by their level of digital comfort. While artists' responses in both groups are similar, digitally comfortable artists are slightly more likely than their less digitally comfortable counterparts to cite the cost of upgrading IT systems as a more important barrier than cost and pace of change.

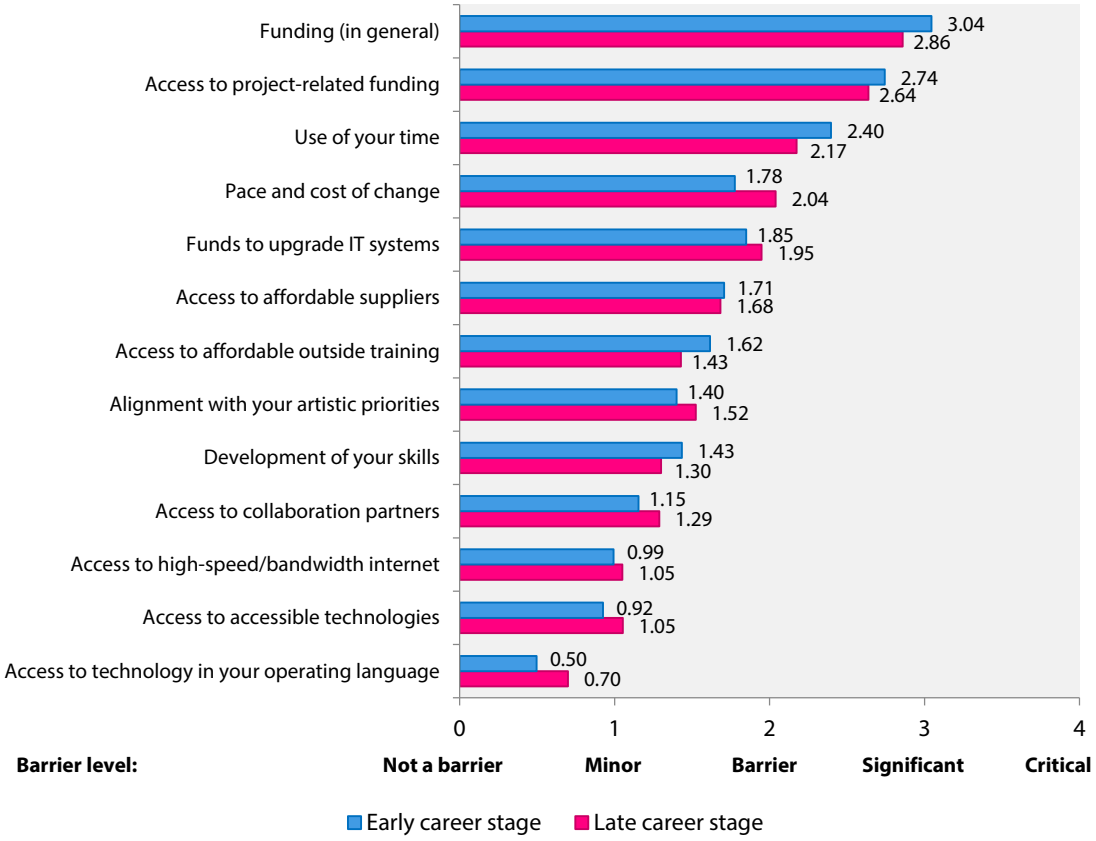
Figure 4: Barriers to success, by digital comfort (artists)



n=2,180
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows that late career stage artists are more likely than less established artists to identify pace and cost of change and funds to upgrade IT systems as significant barriers. As with more digitally comfortable artists, those in the earlier stage of their career are more likely to rank funds to upgrade IT systems as a more significant barrier than cost and pace of change.

Figure 5: Barriers to success, by career stage (artists)



n=2,158
source: Nordicity Arts in a Digital World survey (2016)

2.2 By Discipline

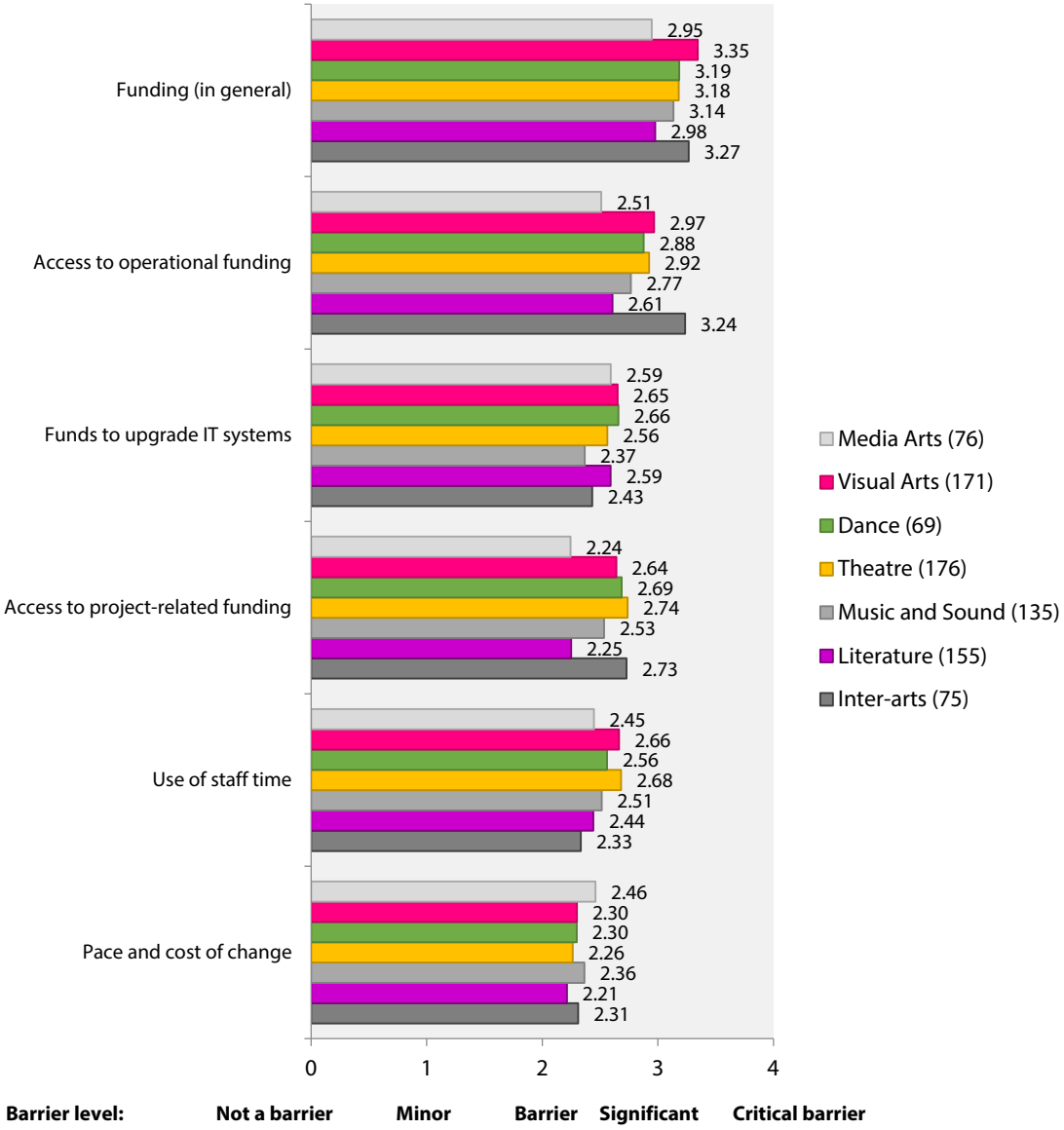
Key Findings

- Apart from different kinds of funding, use of staff time and the pace and cost of change are the top barriers for artists and arts organizations across all disciplines.
- Use of staff time is a greater issue for visual arts and theatre organizations while pace and cost of change is more of an issue media arts and music and sound organizations.
- Among individuals, dancers generally view all factors as a greater barrier, while literary artists deemphasize the challenges they face.

When broken down by discipline, data about barrier to success reveals differences among organizations and between artists. The following chart shows the top six barriers for arts organizations broken out by discipline. Inter-arts and visual arts organizations are notable for their emphasis on funding issues. Dance and visual arts organizations are slightly more likely than other

organizations to identify the costs of IT upgrades as a significant barrier. Theatre organizations were more likely than other organizations to emphasize project-related funding and use of staff time.

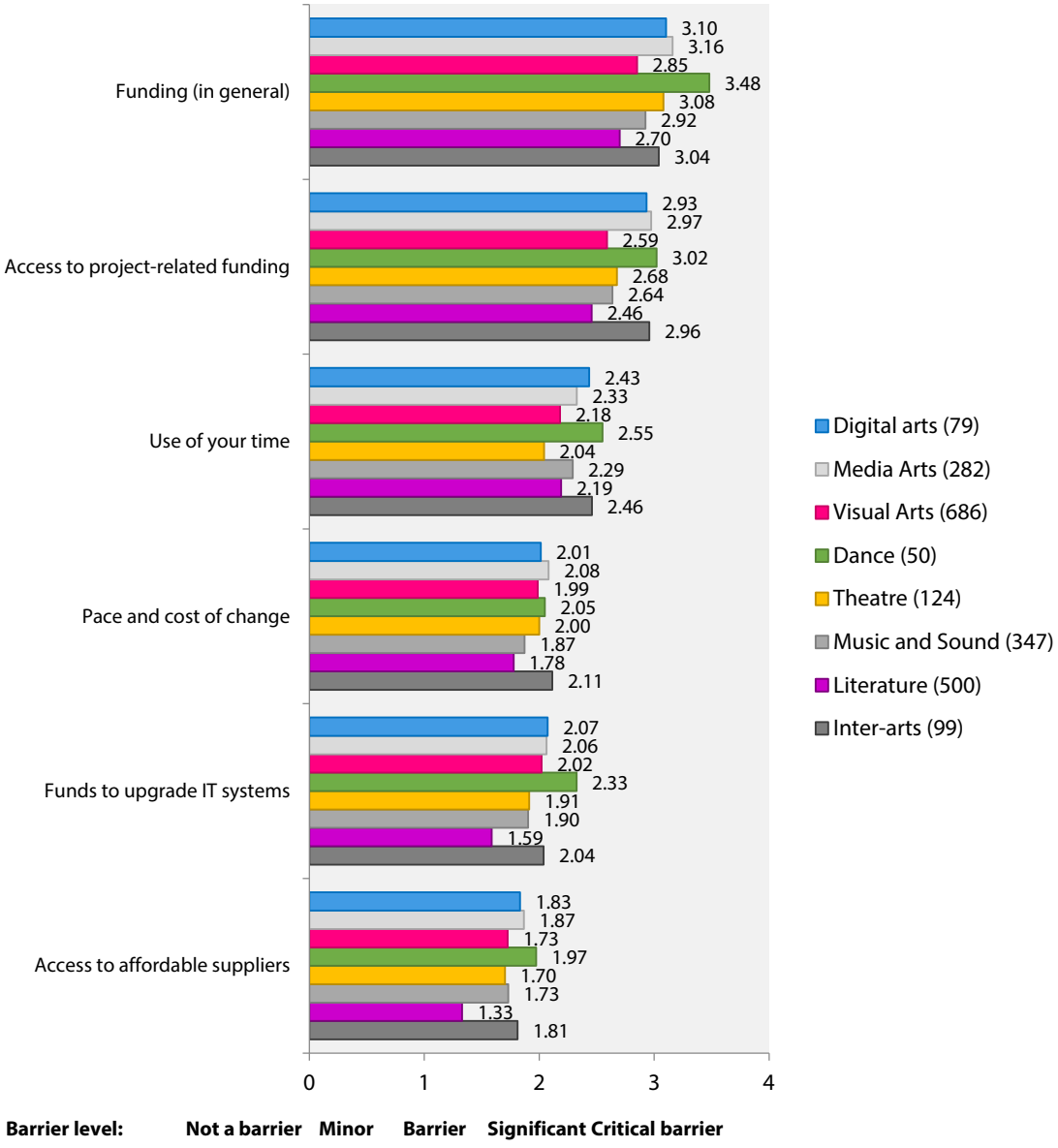
Figure 6: Top six barriers to success, by discipline (arts organizations)



n=857
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows the top six barriers to success for artists broken out by discipline. While artists' priorities are quite similar across all eight disciplines, it is interesting to note that some disciplines show a stronger reaction across all barriers than others. For example, dance practitioners generally perceive all barriers as more significant, whereas literature practitioners tend to view all barriers as less significant.

Figure 7: Top six barriers to success, by discipline (artists)



n=2,167
source: Nordicity Arts in a Digital World survey (2016)

3. Summary of Observations

Overall

Artists with a low level of digital comfort exhibit a significant drop in their usage of tools that are less widely used overall. This finding is intuitively consistent with the adoption rates reported among

artists with low levels of digital comfort in Thematic Report 2. Survey results suggest that artists with a low level of digital comfort are unlikely to adopt technologies until their peers have also done so.

Artists

Those artists reporting a low level of digital comfort are significantly less likely than their more comfortable peers to use technologies that are less widely used overall. In many cases, there is little variation between groups for the most common tool but usage among less comfortable artists drops off for other technologies.

Arts and Digital Tools

Digital technologies are most often employed to enhance discoverability and dissemination, with social media and websites as the prevalent tools for all survey respondents. Among both organizations and artists, websites and social media were identified as the top ways to help audiences discover content. In much the same way, individuals as well as organizations emphasized the importance of social media for connecting with peers. The fact that social media was ranked as the most common tool for collaborating with both the public and other artists reinforces this finding.

In addition to similarities across user groups, survey results also show that different tools are used for the same reasons. For instance, organizations cited promotion of upcoming events and shows as the primary purpose of both websites and social media. Although there is consensus on the importance of technology to discoverability, variations in website features show that different disciplines share their work in ways that are most appropriate to their chosen art form. As a result, dance and theatre organizations are most likely to host video on their websites while literature organizations are the most common users of blogs.

Although more than half of survey respondents reported using digital sales platforms, only 27% of organizations and 21% of individuals made more than half of their sales through online channels.

Data Use

Both groups are more likely to collect data from websites and social media platforms that online sales tools. Specifically, while 41% of organizations and 22% of artists collect sales and dissemination data, 64% of organizations and 43% of artists collect website data. These findings reflect the generally lower use of digital sales tools in comparison to other technologies.

Regardless of data source or respondent group, by far the most common use of data is for marketing and audience development strategies.

Return on Investment and Satisfaction

Organizations reported on the cost of digital tools and revealed that, on average, just over one third (37%) of their total operating budgets goes towards technology. To be more specific, an average 10.6% of operating budgets is spent on websites and social media combined. Interestingly, although smaller organizations spent proportionately more on digital tools than large organizations, they were also more likely to anticipate future investments in technology. Organizations and artists generally reported high levels of satisfaction with websites and both also indicated future investment in this tool.