Canada Council for the Arts

The Arts in a Digital World

Thematic Report

3. Artists and Digital Tools

Survey Data Report

February 2017

Prepared by

Nordicity

Prepared for

Canada Council for the Arts

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Thematic Report

3. Artists and Digital Tools

Prepared by Nordicity

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. Arts and Digital Tools

This thematic report examines the role that digital tools play in different aspects of the creative process. Artistic activities are divided into three areas:

1. Creation, research and production;
2. Sales and dissemination; and
3. Marketing and communications.

For each of these areas, the responses of artists and organizations are compared to understand both current practices and the rationale behind different applications of digital technology. In the case of arts organizations, this thematic report also provides an analysis of the role of digital tools in fundraising and management.

Survey results indicate that **websites and social media are essential to both creation and communications for arts organizations and artists.** Along with text tools, websites and social media are the most prevalent tools used for creation, research and development in both groups. Moreover, arts organizations and artists identified event promotion, digital dissemination and discoverability of artworks as the top reasons for using websites as a communications and marketing tool.

In the area of sales and dissemination, a slight majority of arts organizations (57%) and artists (52%) reported using online sales platforms. **Despite similar rates of adoption, revenue trends diverge with 57% of organizations but only 21% of artists indicating that they made more than half of their sales online.** These results may correlate to the use of digital sales tools, which are used by 65% of organizations compared to 42% of individual artists. The use of apps also reveals trends in sales and dissemination. Specifically, of the 61% of organizations that used apps created by others, the second most common use cited was mobile payment.

2.1 Creation, Research and Production

The charts below analyse the role of digital technology in several different phases of the creative process. Results indicate that **text tools, social media and web development tools are the most prevalent technologies used in creation and production for both organizations and artists.** On average, organizations are slightly more likely to collaborate with other creators as well as considerably more likely to collaborate with the public using digital tools. Specifically, 75% of organizations reported collaborating with other creators and 66% reported collaborating with the public. In contrast, although 69% of artists indicated using technology to collaborate with other creators, only 39% said they collaborate with the public.

Both groups were also asked if they create or produce digital-first works of art, referring to content that is created exclusively using digital means and does not have a non-digital counterpart. Unlike for collaboration, artists were significantly more involved in creating digital-first works: **54% of artists create digital-first works, compared with 38% of arts organizations.** In both cases, use of technology correlates with digital comfort.

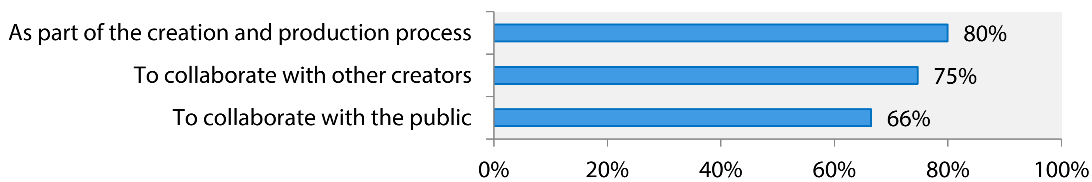
2.1.1 Arts organizations

Key Findings

- The vast majority (80%) of arts organizations (even those with low levels of digital comfort) use technology as part of the creative process.
- The most popular tools for creation and production are text, social media and web creation tools.
- Large organizations are more likely than small organizations to use technology to collaborate with the public, especially through surveys and polling.
- On average, only 38% of organizations create digital-first artworks.

The following chart shows the incidence of use of digital creation tools for creation, collaboration with the public, and collaboration with other creators among arts organizations.

Figure 1: Use of digital creation tools (arts organizations)

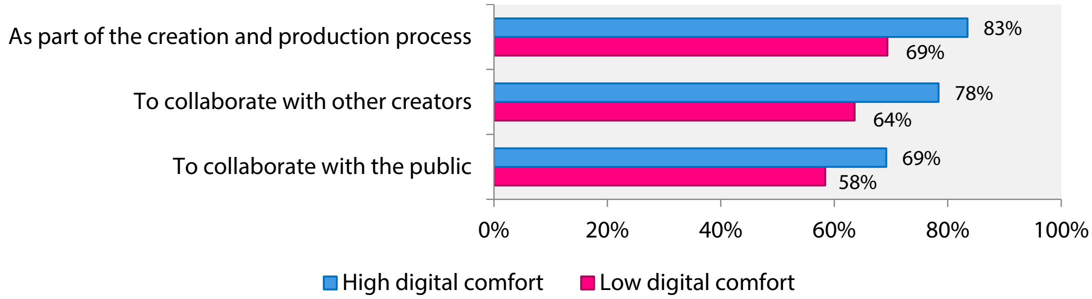


n=705
source: Nordicity Arts in a Digital World survey (2016)

Survey results indicate that most arts organizations use technology in all three areas. On average, 80% of organizations draw on digital as part of the creation and production process. In addition, three quarters of organizations use digital tools to collaborate with other creators and 66% use digital tools to collaborate with the public.

The chart below breaks down the preceding data by organizations' level of digital comfort. Organizations with low digital comfort are less likely to incorporate technology into the creative process however their use of these tools in different activities follows similar trends compared to organizations with higher levels of digital comfort.

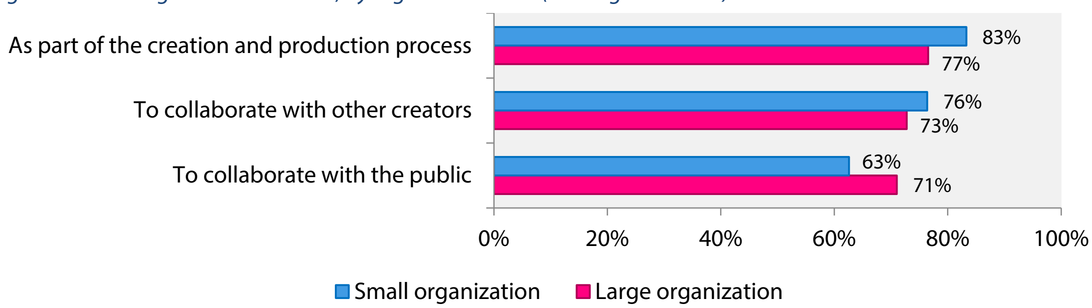
Figure 2: Use of digital creation tools, by digital comfort (arts organizations)



n=705
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows the use of technology in the creative process by organization size. Although larger organizations are less likely to use digital technology for creation, production or collaboration with other creators, they are more likely to use it for collaboration with the public.

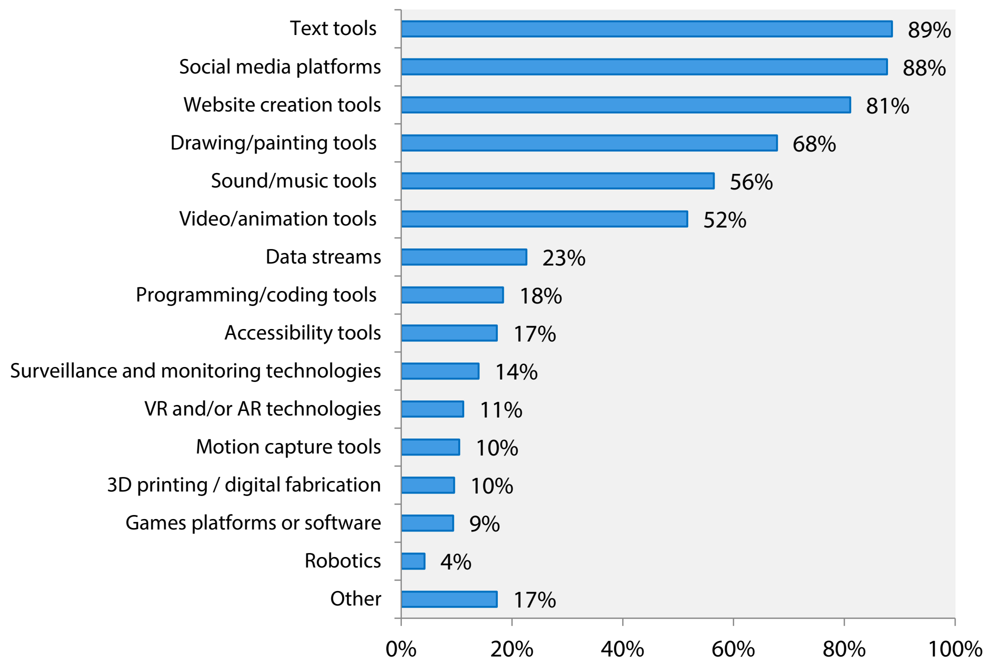
Figure 3: Use of digital creation tools, by organization size (arts organizations)



n=705
source: Nordicity Arts in a Digital World survey (2016)

The chart below illustrates which digital tools arts organizations employ as part of creation and production. Although text tools, social media platforms and website creations tools are the most common technologies, more than half of organizations also use drawing/painting, sound/music, and video/animation tools.

Figure 4: Types of creation and production tools used (arts organizations)

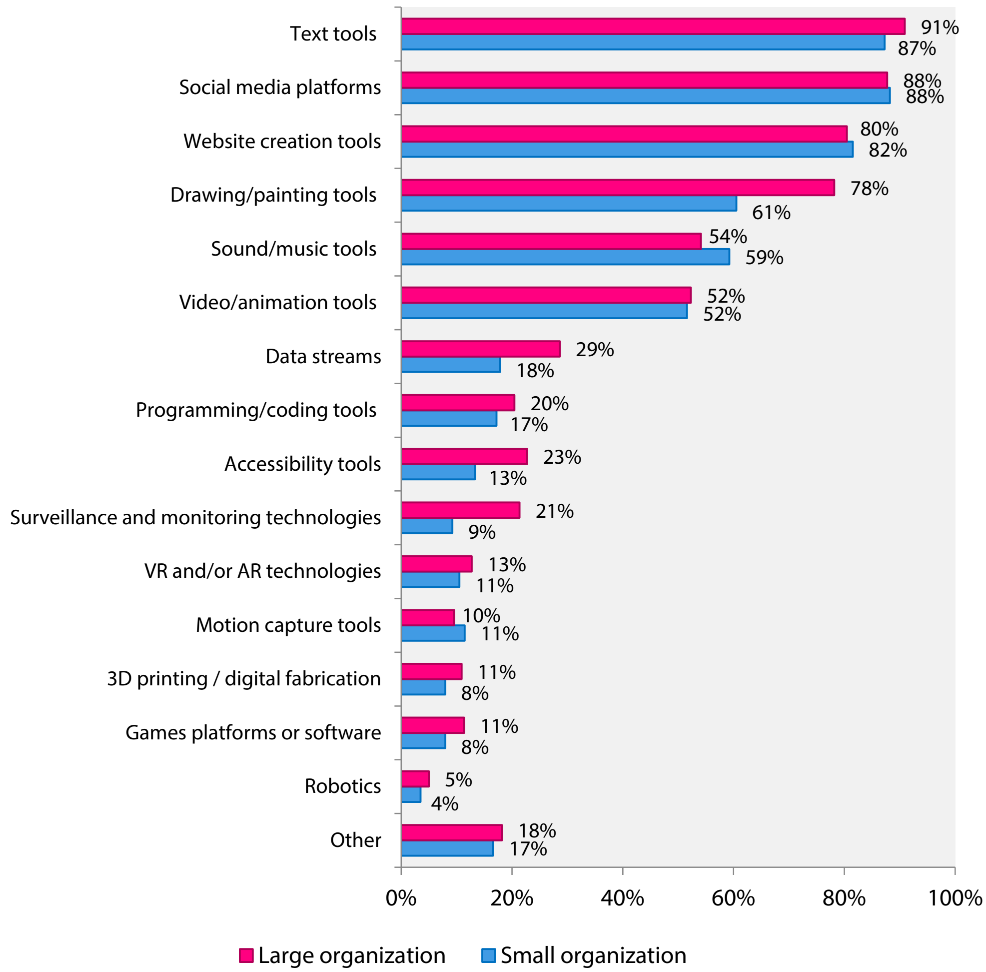


n=544
source: Nordicity Arts in a Digital World survey (2016)

There is no significant variation by level of digital comfort; however, as one would expect, more comfortable organizations are more likely to use tools in all cases.

In contrast, the following chart shows differences by size of organization. In general, large organizations use more digital technologies than small organizations.

Figure 5: Types of digital creation and production tools used, by organization size (arts organizations)

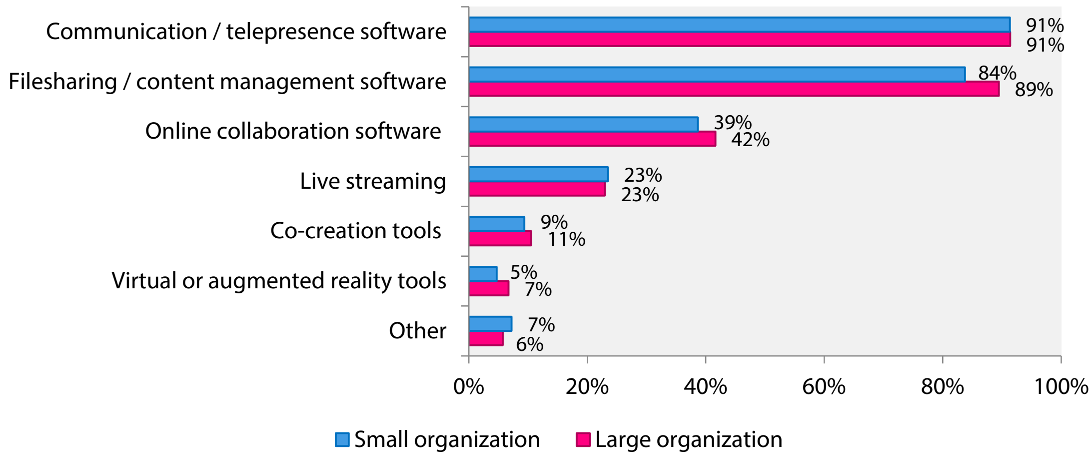


n=544
source: Nordicity Arts in a Digital World survey (2016)

Small organizations are just as likely to use social media platforms and more likely to use web creation tools and sound or music tools. Conversely, organization size has the greatest impact on the use of drawing/painting tools, data streams and surveillance and monitoring technologies. In fact, large organizations (21%) are more than twice as likely to employ surveillance and monitoring compared to small organizations (9%). This finding is logical given that large organizations are more likely to have premises in need of surveillance.

The following chart breaks down the use of different digital tools to collaborate with other creators by organization size.

Figure 6: Types of digital tools used to collaborate with other creators, by organization size (arts organizations)

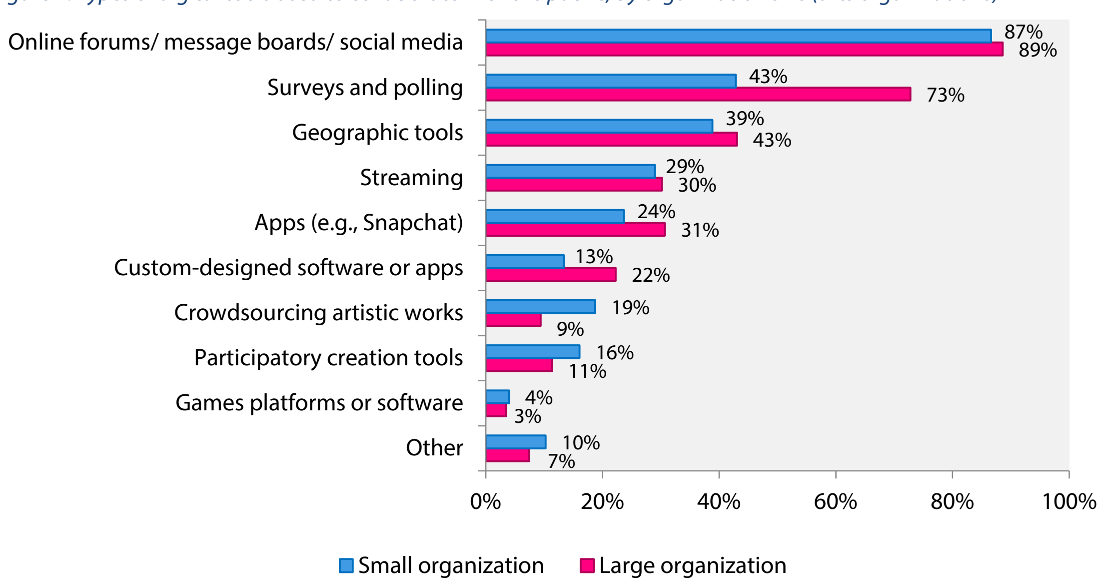


n=495
source: Nordicity Arts in a Digital World survey (2016)

In almost all cases, large organizations use digital tools for collaboration more often than small organizations. The primary exceptions are communications and telepresence software, which are used by 91% of both groups, and live streaming, which is used by 23% of organizations regardless of size.

The following chart illustrates the use of digital tools to collaborate with the public, broken down by organization size. Although not shown, organizations with higher levels of digital comfort were more likely to employ all technologies. Regardless of size or level of comfort, online forums, message boards and social media are the most popular tools for all organizations.

Figure 7: Types of digital tools used to collaborate with the public, by organization size (arts organizations)



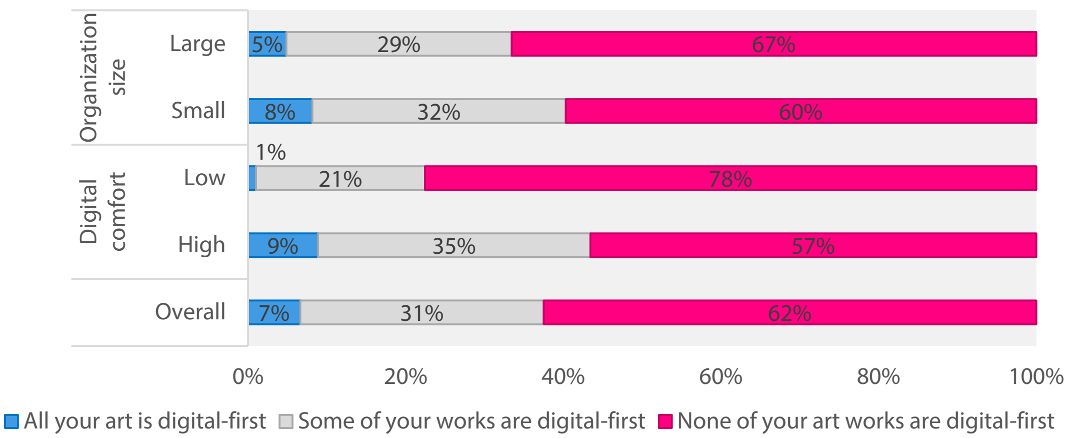
n=495
source: Nordicity Arts in a Digital World survey (2016)

In general, large organizations use more digital tools for collaborating with the public than smaller organizations. The greatest discrepancy by organization size is in the use of surveys and polling. Whereas 73% of large organizations use surveys and polling, less than half (43%) of small organizations do so. This difference could reflect the resources required to conduct a survey or the reach of organizations of varying sizes: a smaller organization may not have enough stakeholders to justify developing a survey.

It is worth noting that small organizations use crowdsourcing, participatory creation tools and video game platforms or software more often than large organizations. In fact, small organizations are more than twice as likely (19%) to crowdsource artistic works than large organizations (9%).

The chart below illustrates the creation of digital-first works of art by organization size as well as level of digital comfort. Overall, the majority of organizations (62%) do not create any digital-first works.

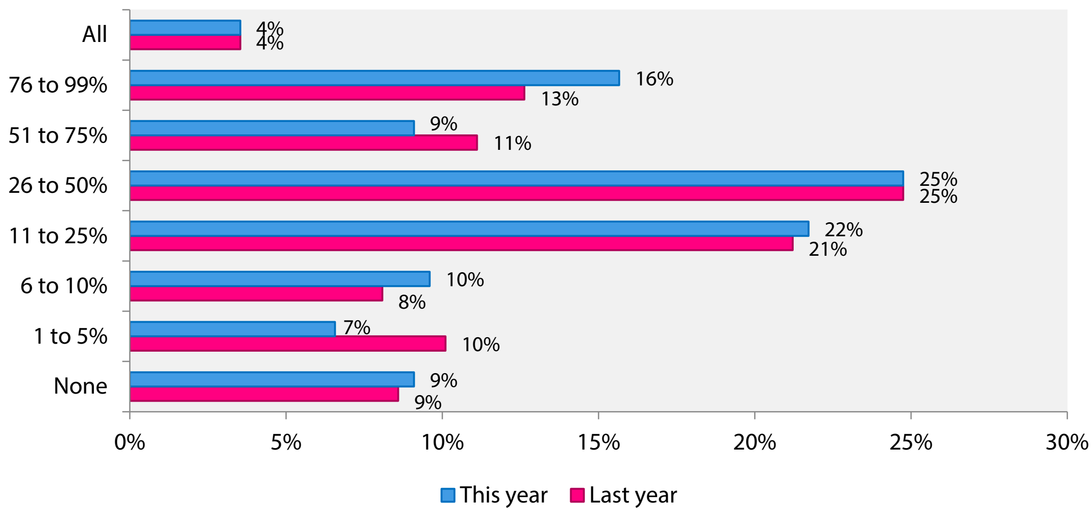
Figure 8: Digital-first works of art, by digital comfort and organization size (arts organizations)



n=693
source: Nordicity Arts in a Digital World survey (2016)

Organizations with a low level of digital comfort are least likely to create digital-first works of art and 78% of them do not create any. Nonetheless, the level of digital-first art making is quite low across the board. Only 44% of digitally comfortable organizations produce any digital-first works. Unlike other trends in the use of technology as part of the creative process, small organizations are more likely than large organizations to create digital-first works.

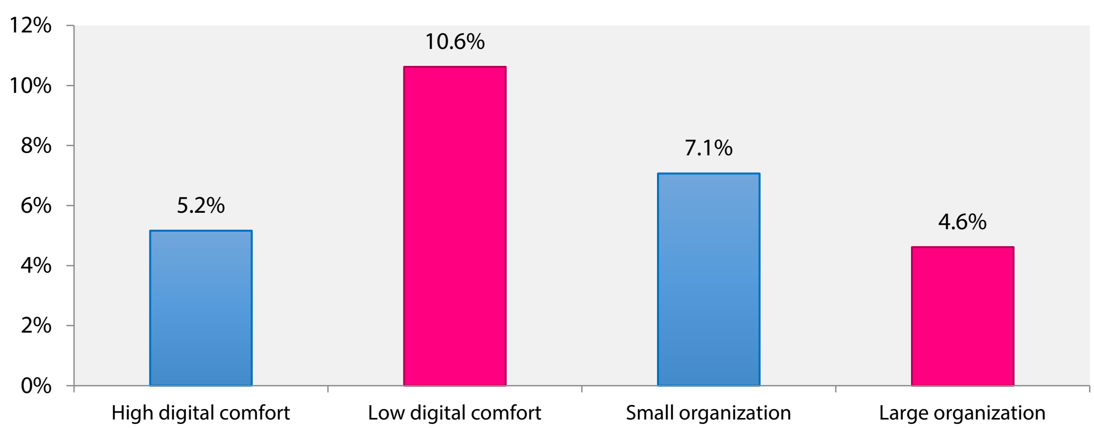
Figure 9: Percentage of art works created using digital tools (arts organizations)



n=198
source: Nordicity Arts in a Digital World survey (2016)

The table below shows that despite a lower level of digital comfort for some organizations, organizations of all types are increasingly using digital technologies to create their artistic works.

Figure 10: Growth in percentage of works created using digital tools, by digital comfort and organization size (arts organizations)



n=198
source: Nordicity Arts in a Digital World survey (2016)

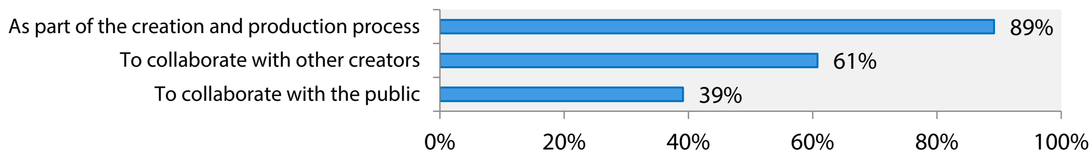
2.1.2 Artists

Key Findings

- 89% of artists use digital tools in the creation and production of artwork.
- The most prevalent technology used in creation and production are text tools, social media and web development tools.
- Although 69% of artists use technology to collaborate with other creators, only 39% use it to collaborate with the public.
- 54% of artists create digital-first works.

As the following figure illustrates, the vast majority of artists (89%) use digital creation tools as part of the creation and production process, however considerably fewer use these tools to collaborate with other creators or the public.

Figure 11: Purpose of digital tools (artists)

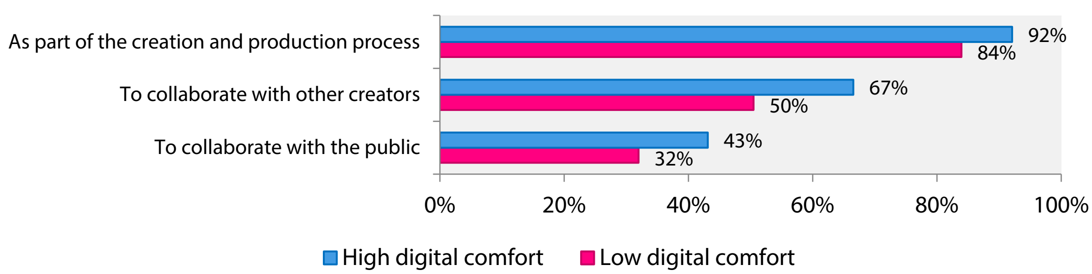


n=2,285
source: Nordicity Arts in a Digital World survey (2016)

In combination, 68% of artists use digital tools for collaborating with either other creators or the public. By extension, about half (52%) of the artists that use digital tools to collaborate with other creators also employ digital tools to collaborate with the public.

The following figure breaks out the preceding information by artists' level of digital comfort.

Figure 12: Purpose of digital tools, by digital comfort (artists)

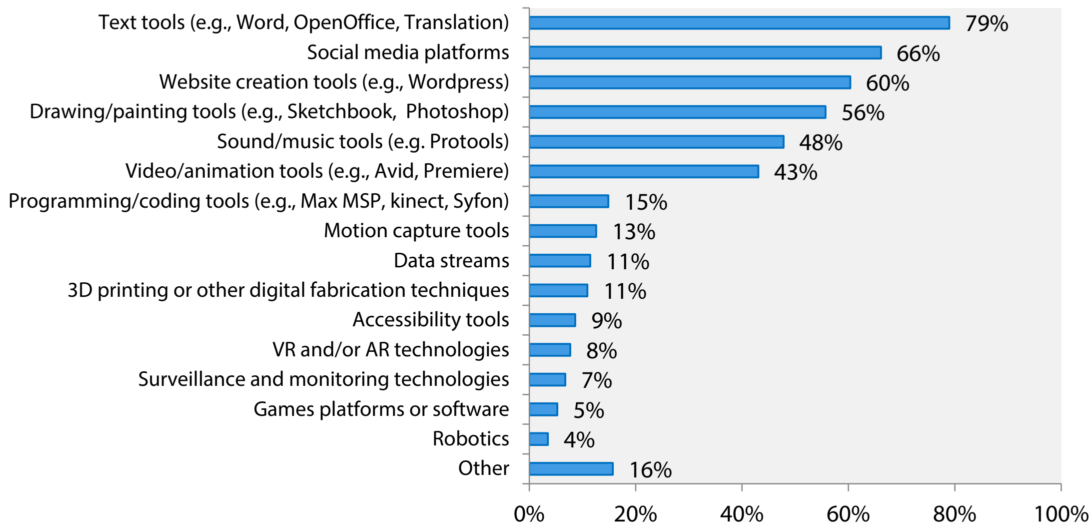


n=2,284
source: Nordicity Arts in a Digital World survey (2016)

As seen above, a strong majority of artists with low digital comfort use digital tools as part of the creation and production process. The greatest difference distinguishing artists with lower levels of digital comfort is the degree to which they use digital tools to collaborate with other creators.

As the following figure shows, text tools are the most commonly used digital creation tools, followed closely by social media platforms and website creation tools. The next most significant type of tools is made up of software with functions that are specific to a particular artistic practice, including drawing/painting, sound/music, and video/animation tools.

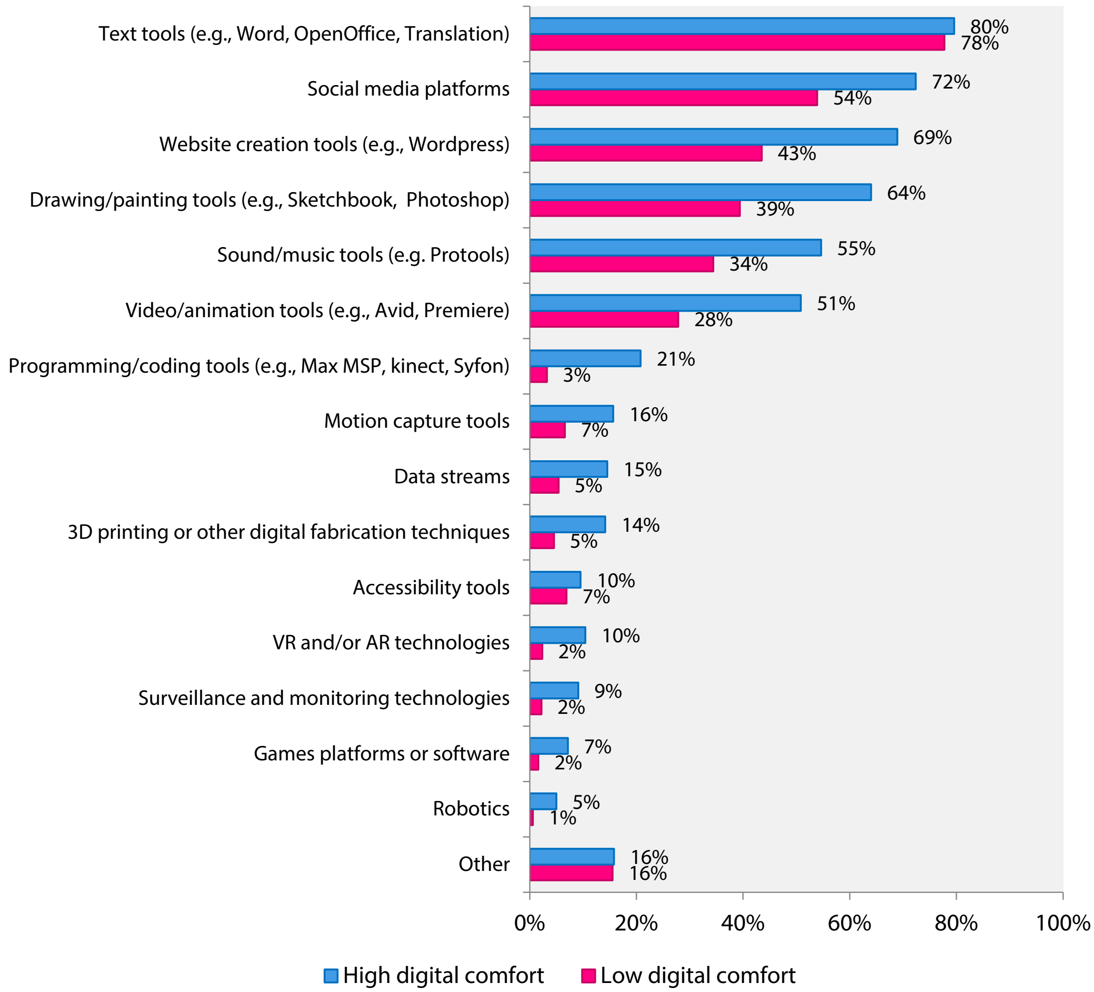
Figure 13: Types of creation/production tools used (artists)



n=2,025
source: Nordicity Arts in a Digital World survey (2016)

The following figure breaks out the preceding information based on artists' level of digital comfort. The most striking feature of this chart is that text tools are used by nearly the same proportions of each group, regardless of their level of comfort with digital tools. All other tools are significantly less likely to be used by those with a low level of digital comfort.

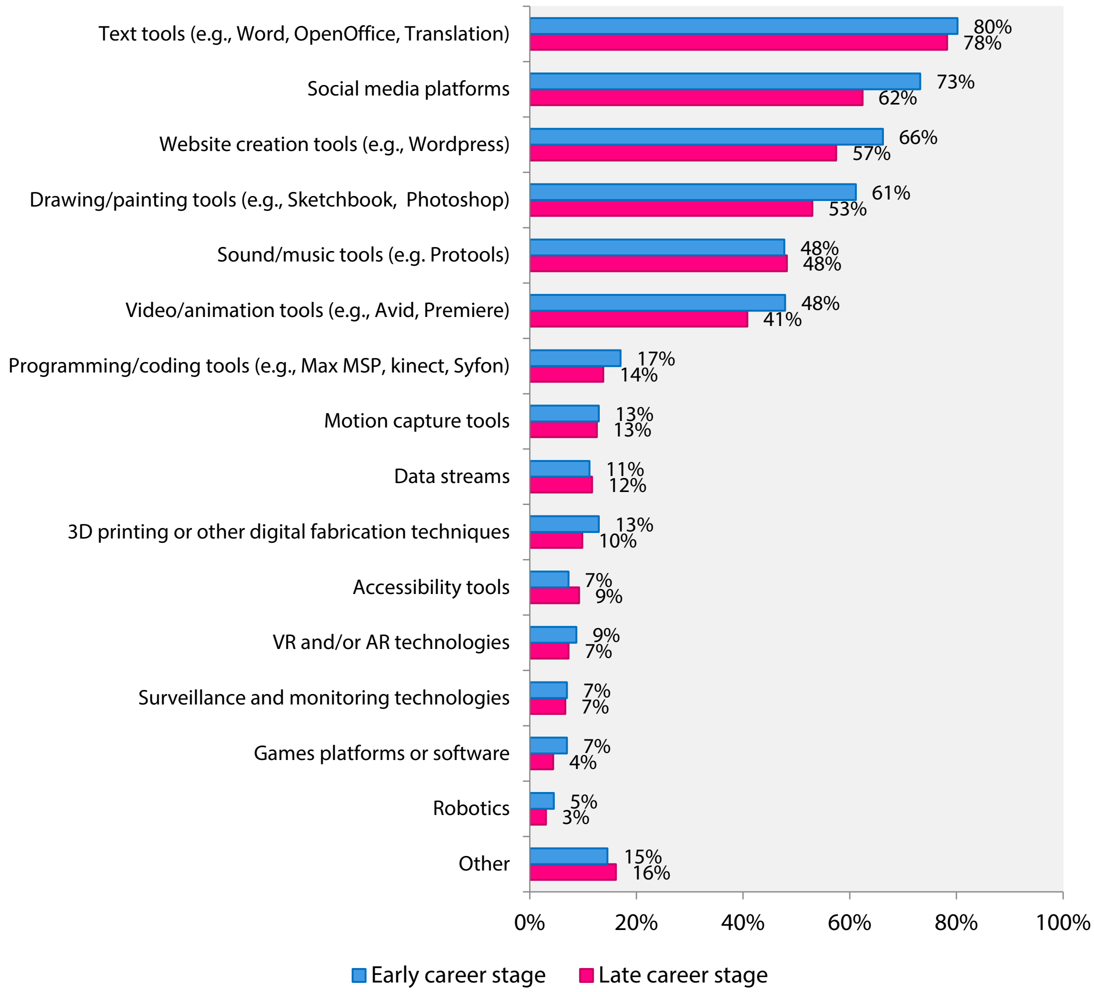
Figure 14: Types of creation/production tools used, by digital comfort (artists)



n=2,025
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows the corresponding difference between early and late career stage artists. Although this breakout is similar to the comparison above, it shows a slightly more prevalent use of some types of software among late-stage artists, including music/sound, data streams, and accessibility tools.

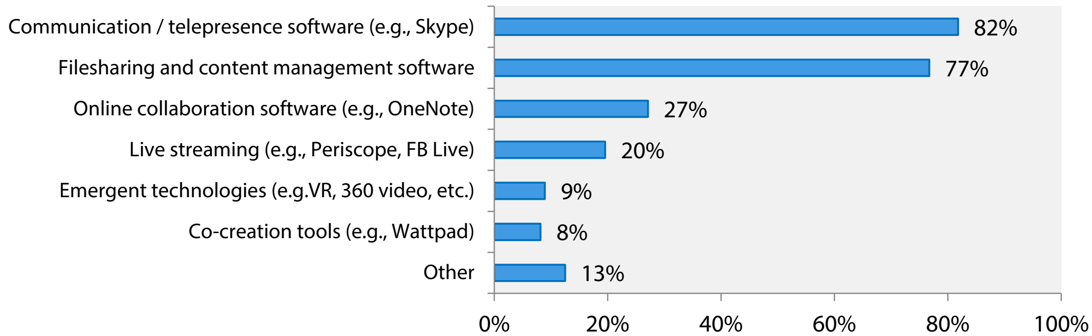
Figure 15: Types of creation/production tools used, by career stage (artists)



n=2,006
source: Nordicity Arts in a Digital World survey (2016). Note that some tools (e.g., video/animation tools) may be discipline-specific.

As the following figure shows, communication/telepresence, filesharing, and content management are the most prevalent types of tools used in collaboration with other artists. Less than half as many artists use online collaboration software, live streaming, emergent technologies or co-creation tools.

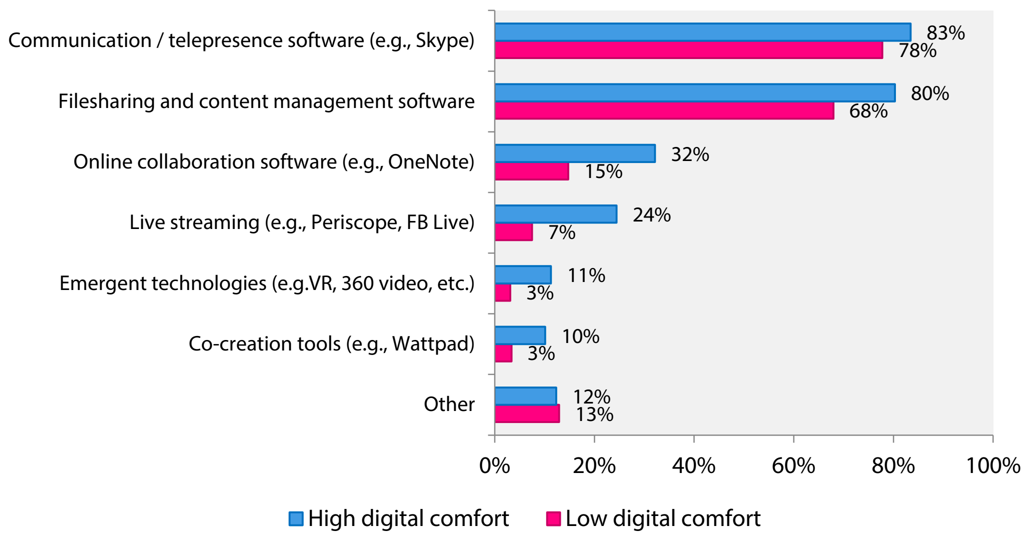
Figure 16: Types of tools used for collaboration with other creators (artists)



n=1,336
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows the use of digital tools for collaboration with other creators by career stage. Although they are slightly less likely to use the three most prevalent tools, artists at a late stage in their careers are more likely to use live streaming, emergent technologies, and co-creation tools than early career stage artists. Although not shown, artists with a lower level of digital comfort simply lagged behind their peers with the greatest gaps seen in the use of online collaboration software, livestreaming and emergent technologies. The contrast in results for artists at different career stage and with different levels of comfort suggests that many established artists are in fact able to use technology for sophisticated purposes.

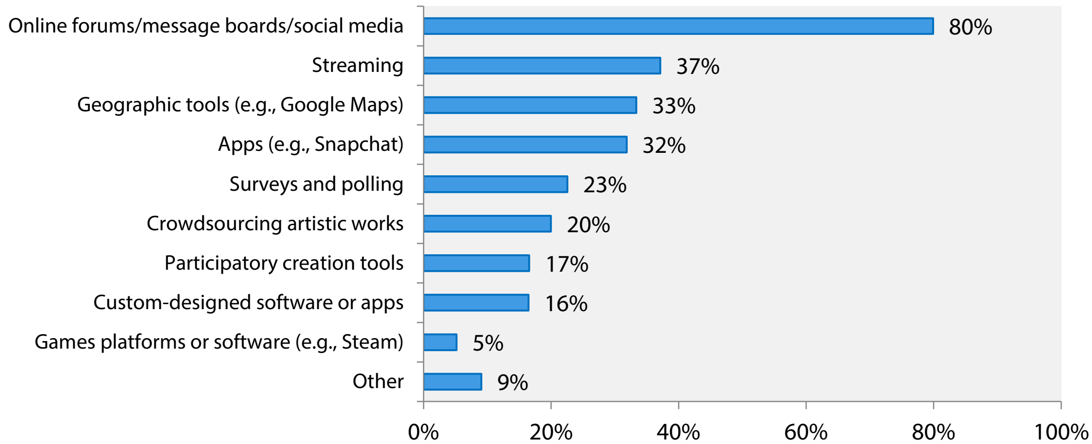
Figure 17: Types of tools used for collaboration with other creators, by career stage (artists)



n=1,322
source: Nordicity Arts in a Digital World survey (2016)

As chart below shows, the most commonly used digital tools to collaborate with the public are online forums, message boards, and social media. These tools are more than twice as common (80%) as the next most prevalent tool, namely streaming (37%).

Figure 18: Types of tools used for collaboration with the public (artists)

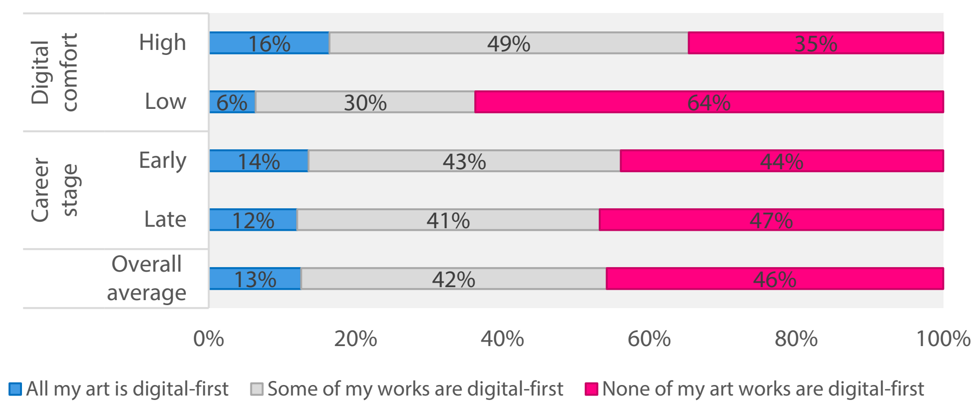


n=851
source: Nordicity Arts in a Digital World survey (2016)

This finding shows that text-based media are some of the most important means for artists to connect and collaborate with the public, which reinforces artists' pervasive use of text editing tools for creation.

The following chart shows that over half of artists (54%) reported creating digital-first works.

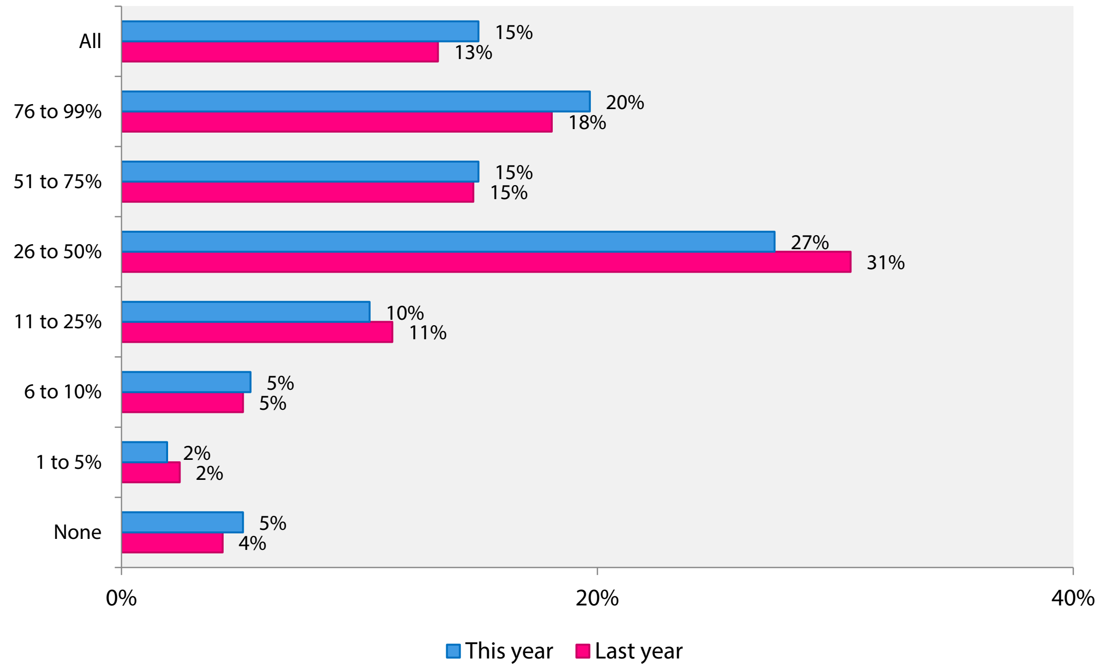
Figure 19: Digital-first works (artists)



n=2,419
source: Nordicity Arts in a Digital World survey (2016)

The following diagram shows how the percentage of artists' works that were created using digital tools changed over the past year.

Figure 20: Percentage of works created using digital tools (artists)

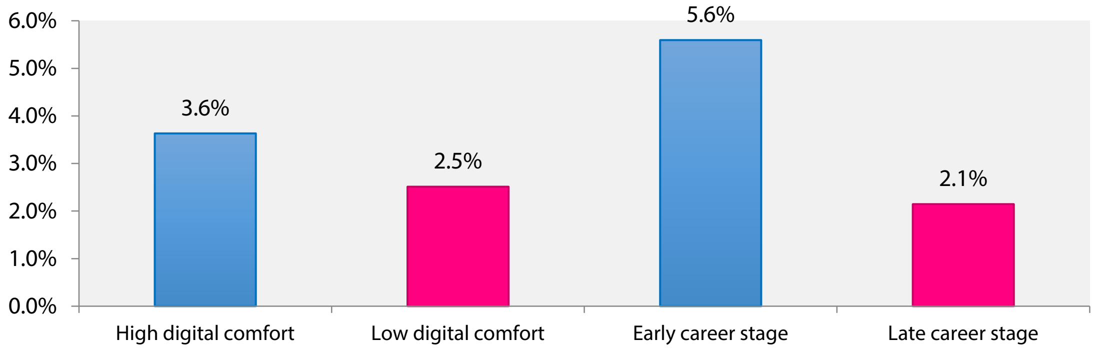


n=940
source: Nordicity Arts in a Digital World survey (2016)

This figure illustrates that there was a modest upward shift from the middle categories (11 to 25% and 26 to 50%), to the higher ones. Aside from some minor changes, artists who reported that less than 10% of their work used digital tools remained constant, representing a 12% share of the population. At the same time, the 11 to 50% group declined by 4%, and the group creating 51% and more of their work with digital tools correspondingly increased by 4%.

While it would be impossible to quantify the exact amount of art produced, given that the sample includes respondents from various disciplines with very different outputs (i.e. there is no common unit to measure circus arts, participatory VR experiences, and paintings), an equal weighting of the above data by artist provides a perspective of how these changes have been distributed across artists of different levels of digital comfort and career stages.

Figure 21: Growth in percentage of works created using digital tools, by digital comfort and career stage (artists)



n=940
source: Nordicity Arts in a Digital World survey (2016)

While these results show a similar trend as that observed in previous comparisons between groups with different levels of digital comfort, the growth in works created using digital tools is notable for being much more pronounced among artists in the early stage of their careers. This is, perhaps, indicative of a recognition among younger artists that their careers are both enhanced by, and dependent upon, their ability to work effectively with technological tools.

2.2 Sales and Dissemination

Artists and arts organizations take advantage of technology to sell and disseminate their work to varying degrees. In most areas, artists' use of digital sales and dissemination echoes that of organizations. **While 57% of arts organizations use digital sales platforms, 51% of artists do as well.** Similarly, 27% of organizations and 21% of individuals reported making more than half of their sales through online channels. The greatest discrepancy was seen in the use of digital dissemination platforms: while 75% of arts organizations used these tools, this figure drops to 53% for artists. However, **social media and website downloads are the most common form of digital dissemination among both groups**. In terms of online payment systems, the majority (65%) of arts organizations use one, while less than half (42%) of arts organizations do so.

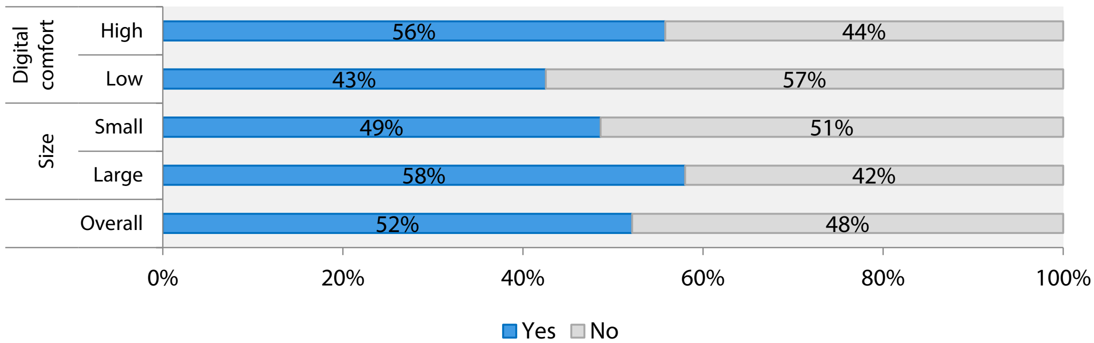
2.2.1 Arts organizations

Key Findings

- 52% of arts organizations use digital sales platforms.
- Digital sales platforms are most prevalent among large organizations while small organizations are more likely to outsource these functions to other websites.
- 27% of organizations reported making more than half of sales through online channels.
- 65% of arts organizations use an online payment system.

As shown in the following chart, more than half (52%) of arts organizations use digital sales platforms. It is worth noting that, unlike in other applications of technology, large organizations are more likely to use digital sales platforms than organizations with a high level of digital comfort.

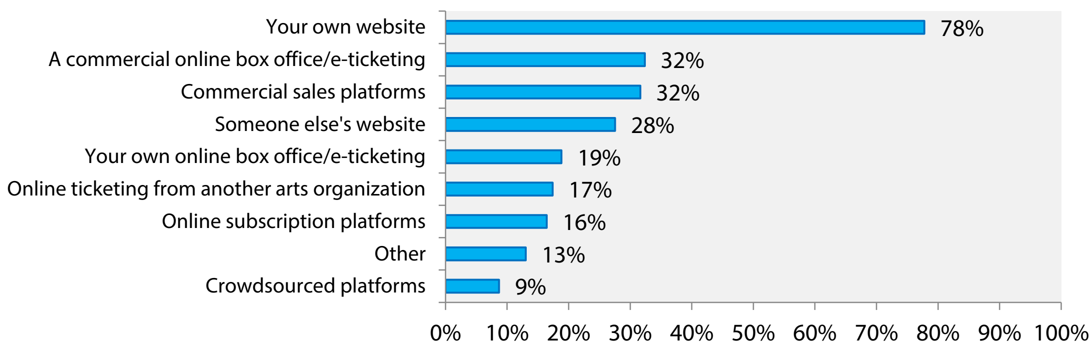
Figure 22: Use of digital sales platforms (arts organizations)



n=775
source: Nordicity Arts in a Digital World survey (2016)

The following chart details the types of digital sales platforms used by arts organizations. Among those organizations that make use of digital sales, more than three-quarters (78%) do so through their own website – while around a third (32%) use commercial online box office services or other commercial sales platforms.

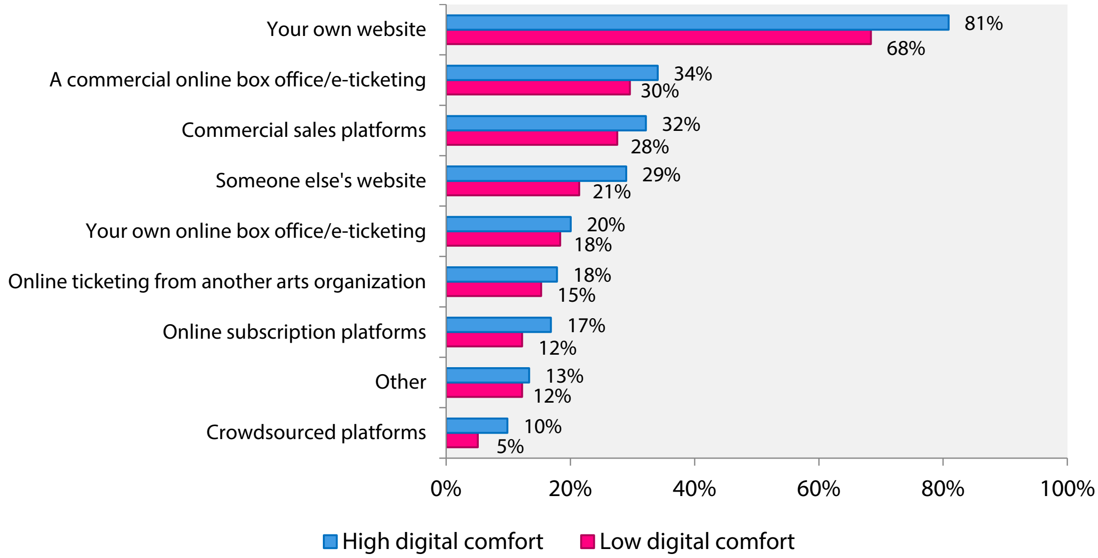
Figure 23: Types of digital sales platforms used (arts organizations)



n=414
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows the type of digital sales platforms used, broken down by level of digital comfort. On average, 78% of all organizations use their own websites. As can be seen below, organizations with lower digital comfort are less likely to use digital sales platforms across the board.

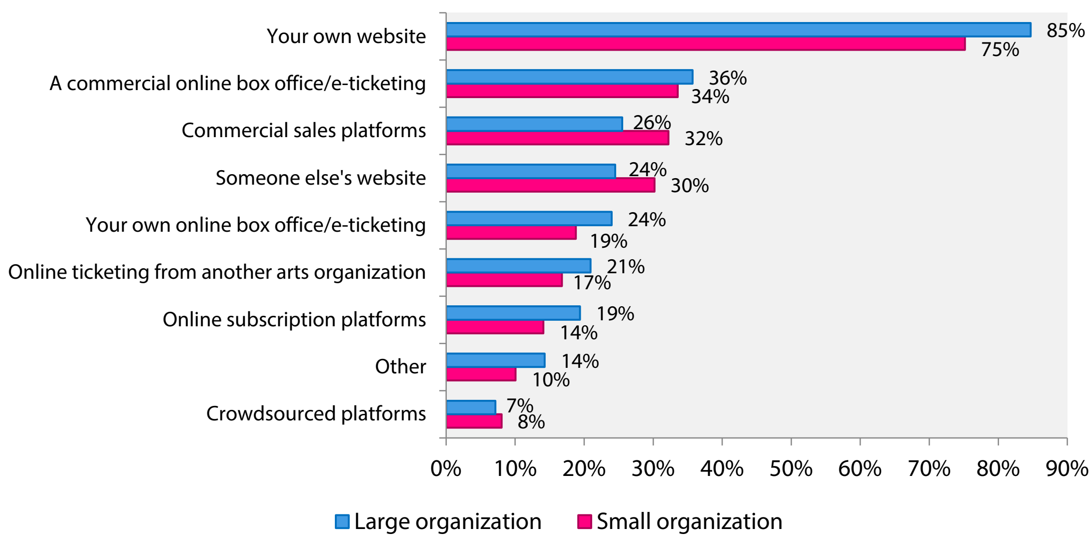
Figure 24: Types of digital sales platforms used, by digital comfort (arts organizations)



n=414
source: Nordicity Arts in a Digital World survey (2016)

This chart analyses digital sales platforms by organization size. Although in general, large organizations are more active users of digital sales platforms and small organizations are significantly more likely to use commercial sales platforms or someone else's websites. This finding indicates that small organizations outsource online sales, perhaps because they do not have the resources to develop these functions on their own.

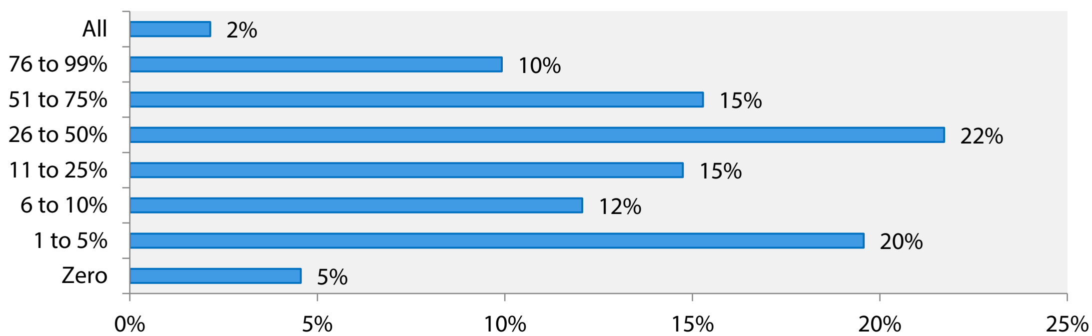
Figure 25: Types of digital sales platforms used, by organization size (arts organizations)



n=414
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows what proportion of organizations sales are conducted online. Slightly more than one quarter (27%) of organizations reported more than half of sales through online channels. Conversely, 25% of organizations indicated that less than 5% of sales happen online.

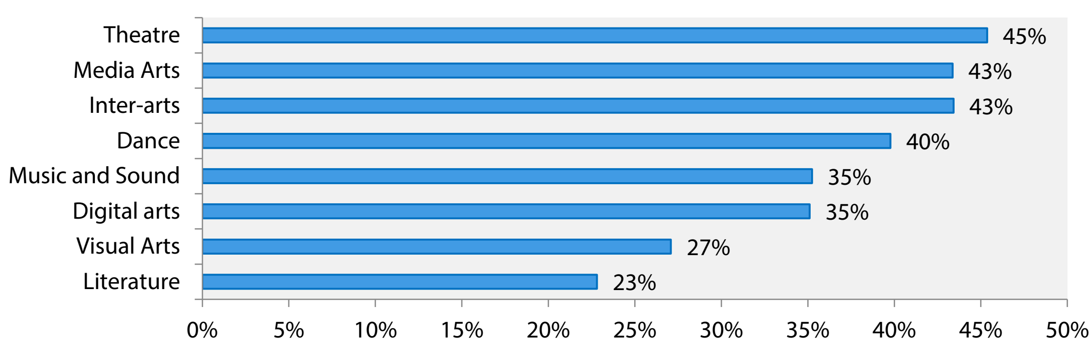
Figure 26: Percentage of total sales through digital channels (arts organization)



n=373
source: Nordicity Arts in a Digital World survey (2016)

The following chart breaks down the percentage of sales occurring through digital channels by discipline. Instead of the full range of responses, each discipline has been reduced to an average, for clarity. Media and inter-arts have high average percentages of online sales – somewhat unexpectedly, so does theatre, which has the highest such average (45%). At the lower end of the scale, visual arts and literature both hover at around a quarter of sales conducted through digital channels, on average.

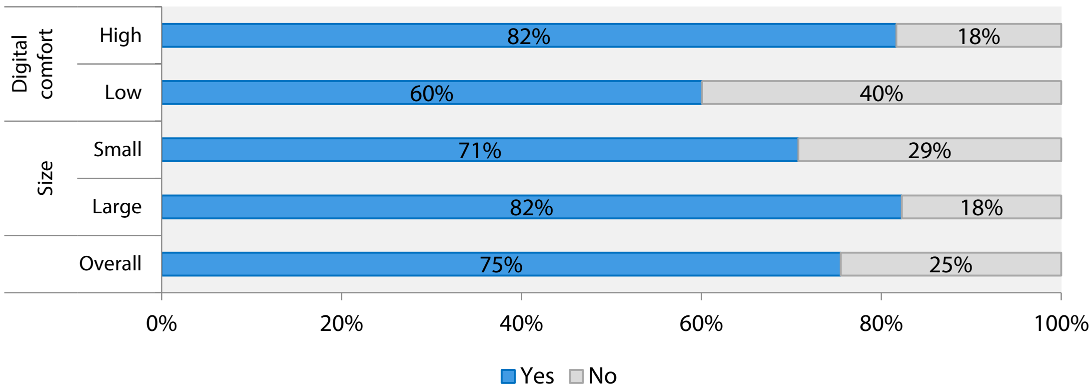
Figure 27: Average percentage of total sales occurring through digital channels, by discipline (arts organizations)



n=373
source: Nordicity Arts in a Digital World survey (2016)

The following chart illustrates the use of digital dissemination platforms. The vast majority (75%) of organizations use these platforms and the fact that even 60% of digitally less comfortable organizations do so confirms the importance of digital dissemination.

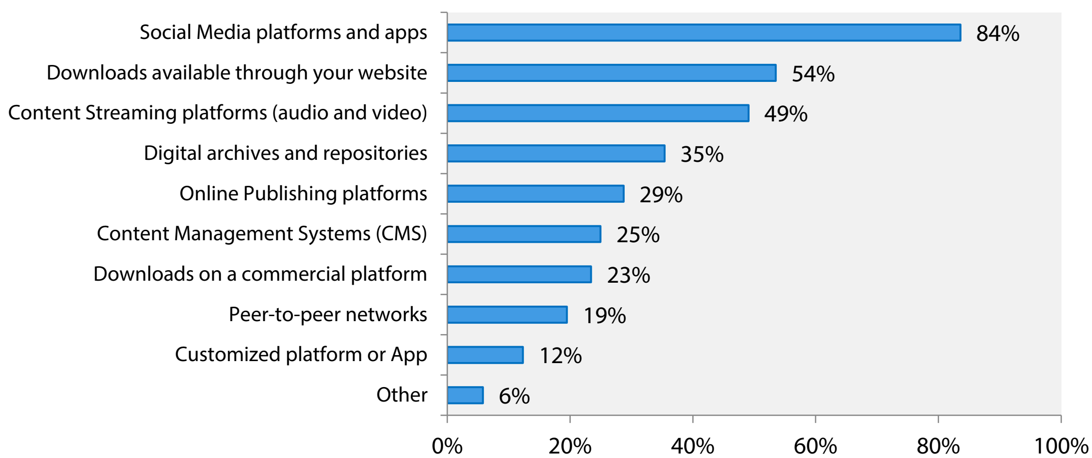
Figure 28: Use of digital dissemination platforms (arts organizations)



n=775
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows the prevalence of different digital dissemination platforms. Social media platforms and apps are the most popular form of digital dissemination while more than half of organizations also make downloads available through their own websites.

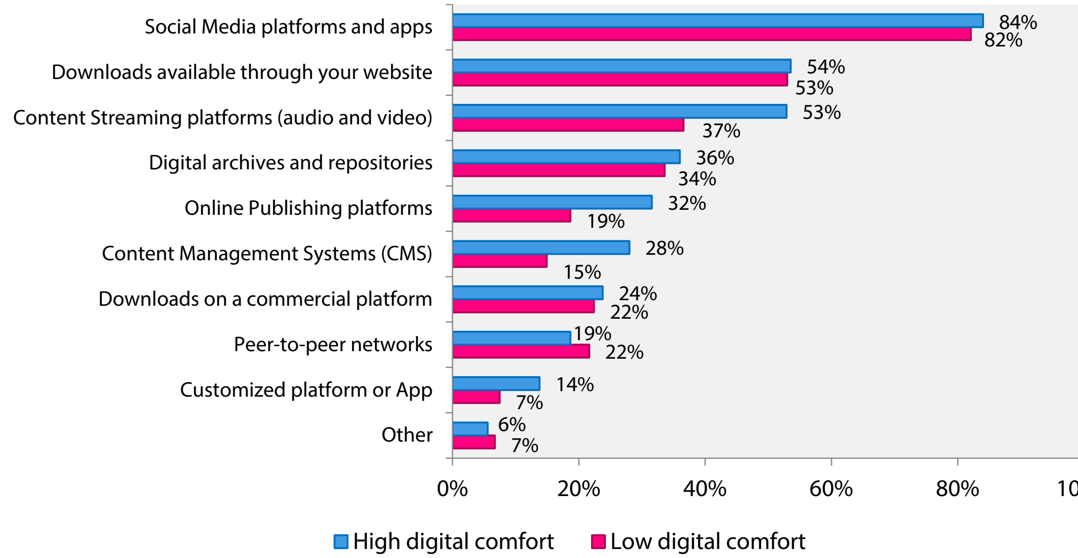
Figure 29: Types of digital dissemination platforms used (arts organizations)



n=489
source: Nordicity Arts in a Digital World survey (2016)

The following chart breaks down the preceding data by level of digital comfort. The greatest discrepancies are in the use of online publishing platforms and content management systems. Conversely, there is very little variation in the top two tools, which indicates that social media and downloads are important to organizations regardless of their level of digital comfort.

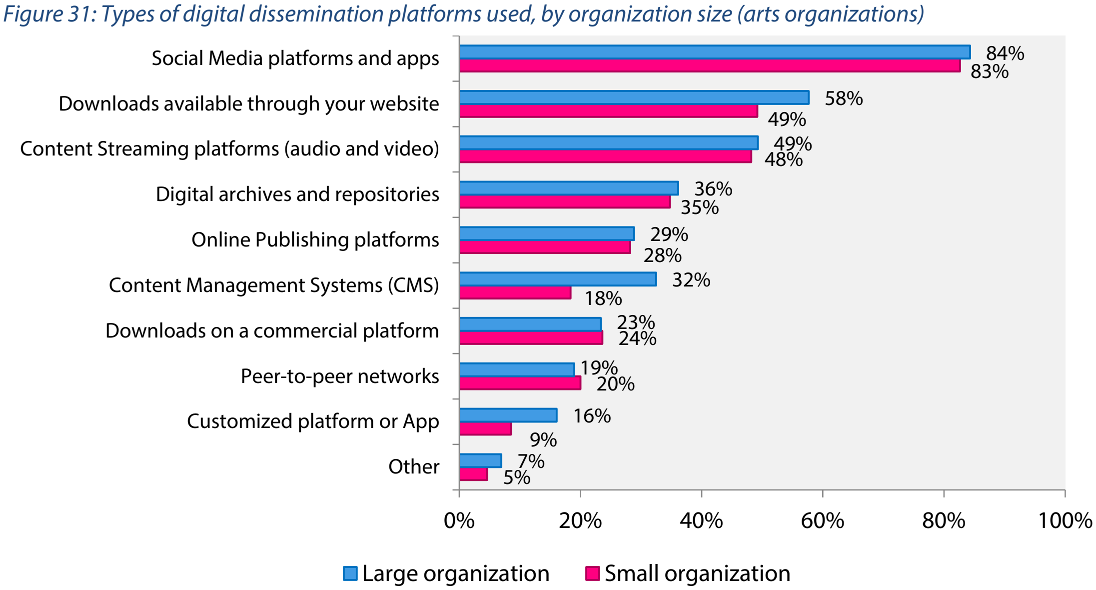
Figure 30: Types of digital dissemination platforms used, by digital comfort level (arts organizations)



n=489
source: Nordicity Arts in a Digital World survey (2016)

When broken down by organization size, small organizations display similar usage trends as large organizations, although at slightly lower levels across the board, with two notable exceptions. Large organizations are considerably more likely to use content management systems than small ones (32% vs. 18%), and also more likely to use custom apps or platforms (16% vs. 9%)

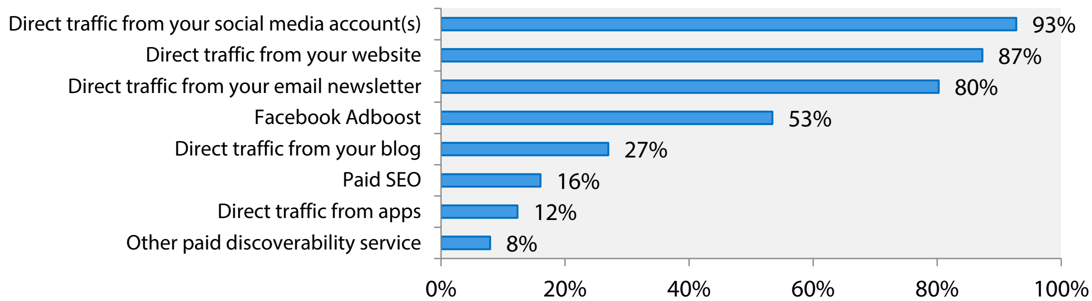
Figure 31: Types of digital dissemination platforms used, by organization size (arts organizations)



n=489
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows the tools that organizations use to help audiences discover content. The most common strategies are direct traffic from social media (93%), their website (87%) and via their email newsletter (80%). At the same time, more than half (53%) of organizations also made use of Facebook Adboost, which is considerably more prevalent than any paid SEO or other discoverability service.

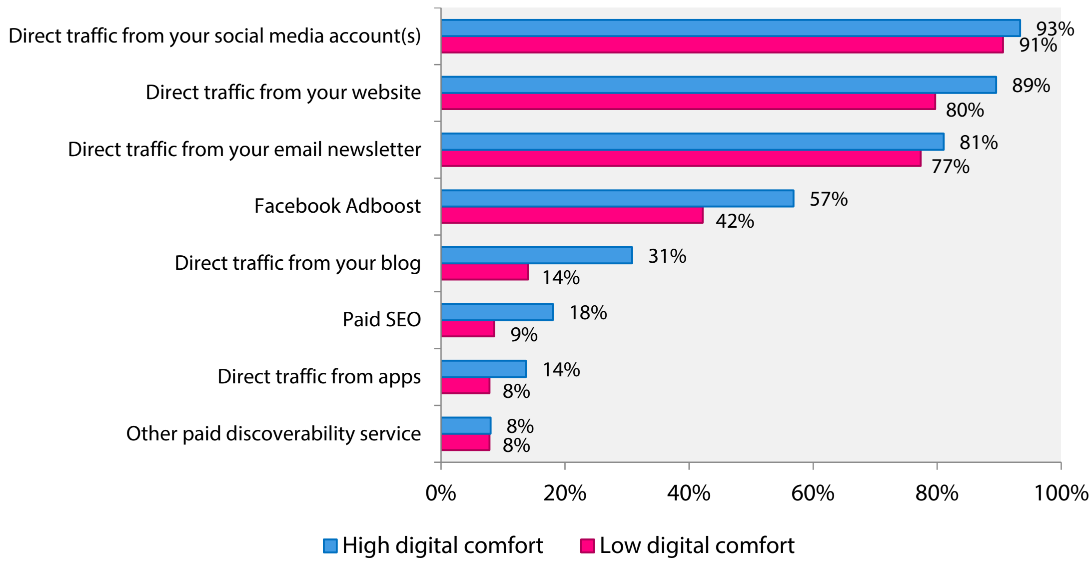
Figure 32: Ways to help audiences discover content (arts organizations)



n=567
source: Nordicity Arts in a Digital World survey (2016)

The chart that follows breaks down the discoverability strategies of organizations by their level of digital comfort. Digitally comfortable organizations are more likely to use Facebook Adboost, paid SEO and direct traffic through a blog to reach new audiences.

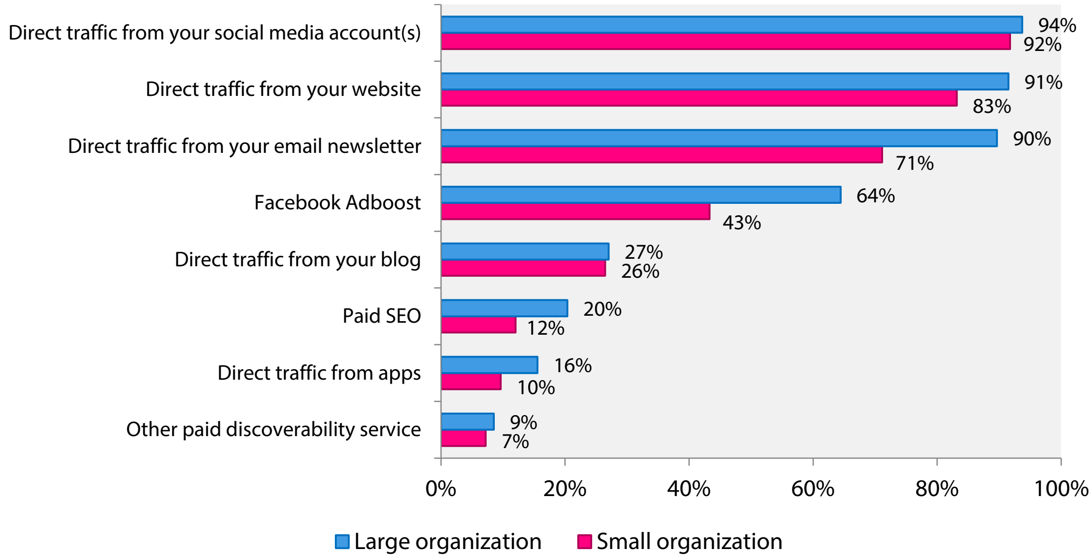
Figure 33: Ways to help audiences discover content, by digital comfort (arts organizations)



n=567
source: Nordicity Arts in a Digital World survey (2016)

When broken out by size, the previous difference in use of blogs disappears, but use of paid SEO and Adboost remain considerably higher than for small organizations. Large organizations are also more likely to use their newsletter to reach out to audiences, possibly because they have more resources available for maintaining an accurate and up-to-date mailing list.

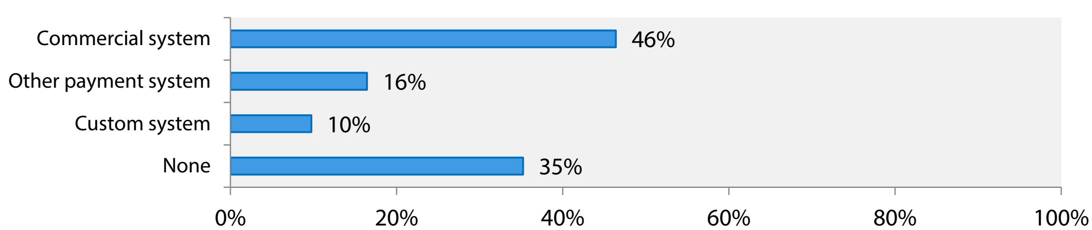
Figure 34: Ways to help audiences discover content, by organization size (arts organizations)



n=567
source: Nordicity Arts in a Digital World survey (2016)

The chart below details the use of online payment systems by arts organizations. 65% of arts organizations use some form of online payment system. Commercial systems such as PayPal are the most popular, employed by 46% of organizations who responded to the survey.

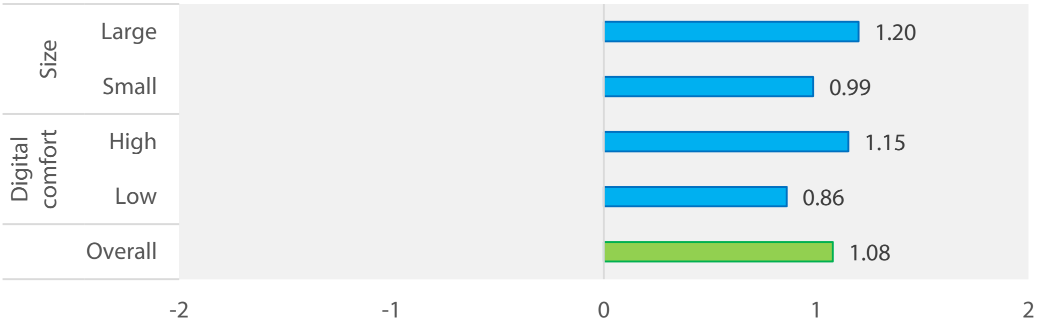
Figure 35: Types of online payment systems used (arts organizations)



n=761
source: Nordicity Arts in a Digital World survey (2016)

The following two charts present the impact of digital technologies on sales and dissemination by digital comfort and organization size. Overall, organizations reported that digital technologies had a somewhat positive impact on sales, on average. Large organizations and digitally comfortable organizations were both slightly above this average, while small and less comfortable ones were slightly below it.

Figure 36: Impact of digital technologies on ability to sell artworks, by organization size and digital comfort (arts organizations)

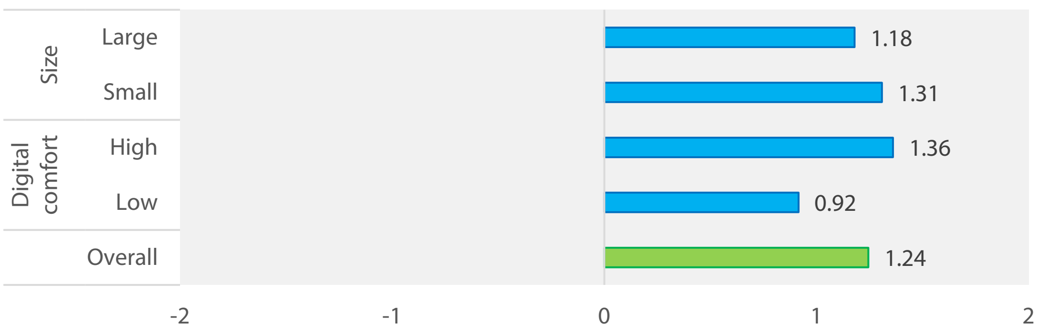


Impact: Significantly negative | Somewhat negative | Little or no impact |Somewhat positive | Significantly positive

n=733
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows that organizations reported that digital technology has a slightly higher impact on dissemination in comparison to sales. In this case, however, smaller organizations perceived a greater impact on dissemination than large ones, while the more digitally comfortable organizations also remained above the overall average.

Figure 37: Impact of digital technologies on ability to disseminate artworks, by organization size and digital comfort (arts organizations)



Impact: Significantly negative | Somewhat negative | Little or no impact | Somewhat positive | Significantly positive

n=757
source: Nordicity Arts in a Digital World survey (2016)

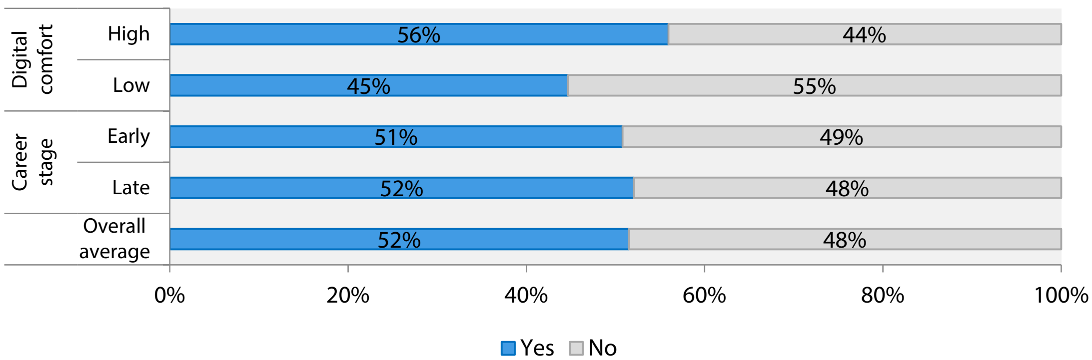
2.2.2 Artists

Key Findings

- 52% of artists use online sales platforms.
- 21% of artists generate more than half of their sales online.
- 53% of artists use digital dissemination platforms.
- 58% of artists do not use any digital payment systems.

As the following chart shows, slightly over half of artists (52%) use online sales platforms for their work. Generally, there is little difference between different comparison groups.

Figure 38: Use of online sales platforms, by digital comfort and career stage (artists)

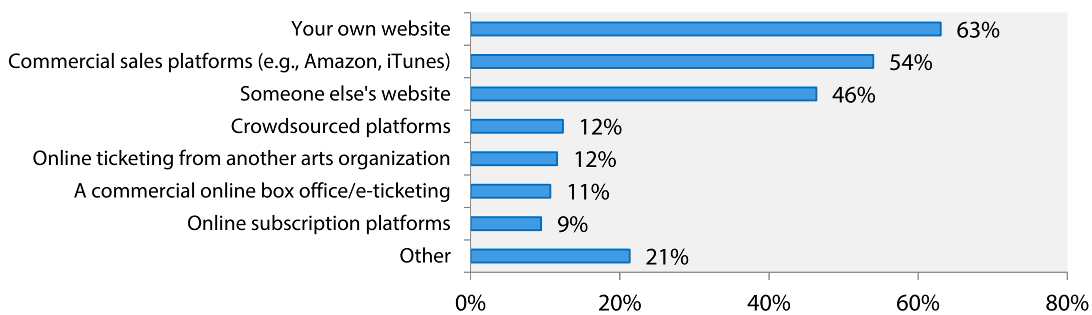


n=2,359
source: Nordicity Arts in a Digital World survey (2016)

While this result is slightly higher among artists who reported a high level of digital comfort, there is little difference between artists at different stages in their career.

The figure below shows that the largest percentage of artists who use various online sales platforms do so through their own website, a commercial sales platform, or someone else's website.

Figure 39: Types of online sales platforms used (artists)

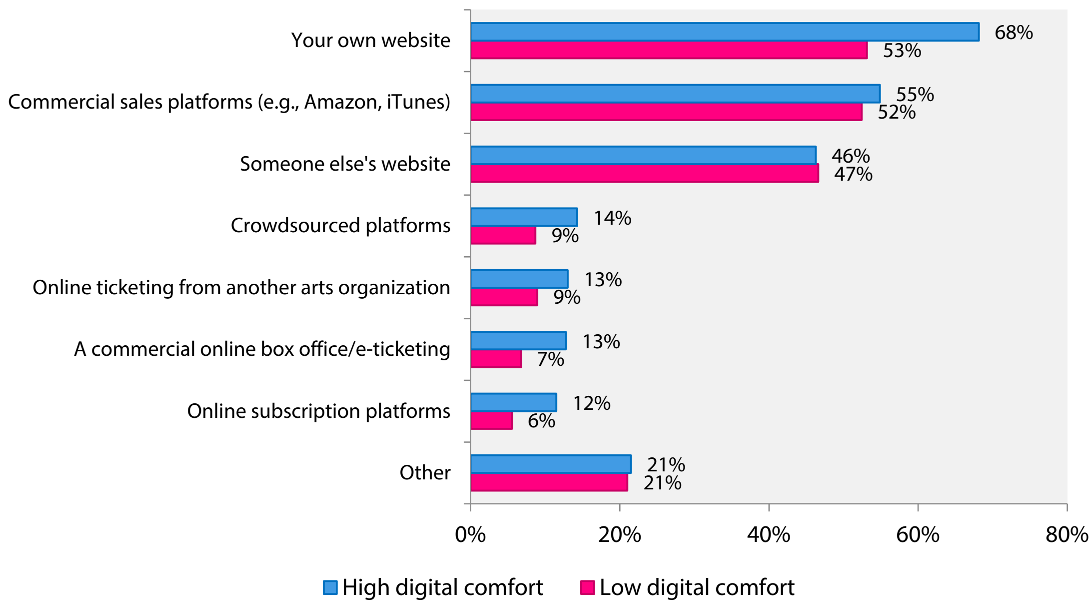


n=1,206
source: Nordicity Arts in a Digital World survey (2016)

While still significant, the other online sales platforms identified above were used by a considerably smaller share of artists overall. This is unsurprising as ticketing and subscription platforms are not equally applicable across artistic disciplines.

The following chart shows that the most significant difference between artists with a low level of digital comfort and their peers occurs in the use of their own website as a sales platform.

Figure 40: Types of online sales platforms used, by digital comfort (artists)

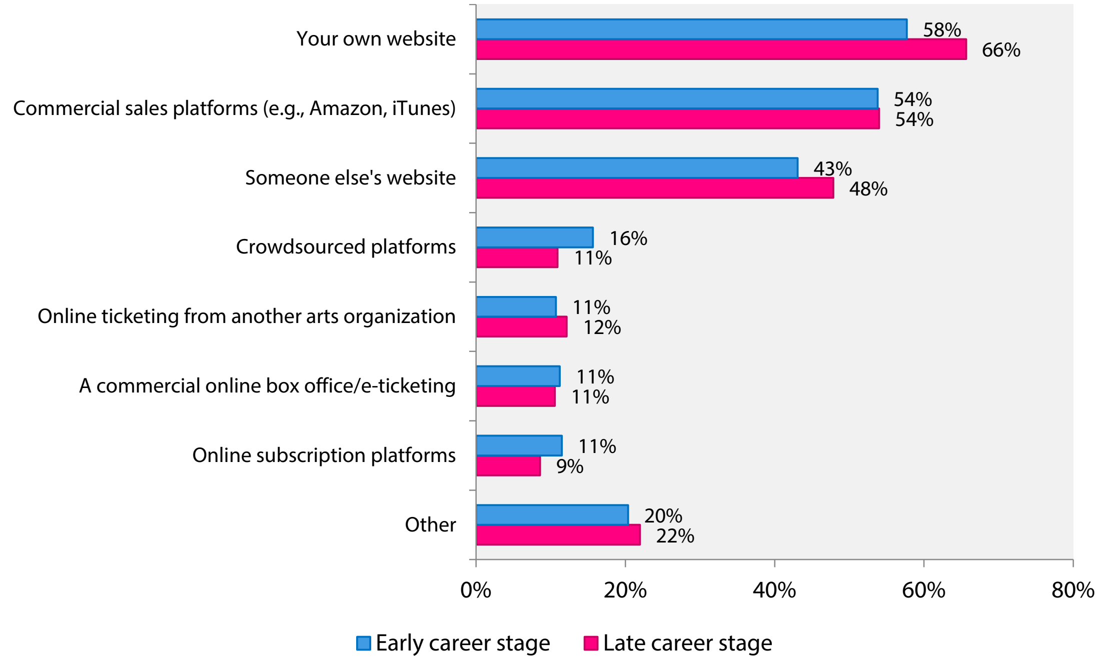


n=1,205
source: Nordicity Arts in a Digital World survey (2016)

The difference described above exceeds the discrepancy between these two groups' use of websites overall. In sum, not only are artists with low digital comfort less likely to have a website at all, those that sell their work online are even less likely to do so through their own website.

As the figure below illustrates, the opposite trend is evident among artists in the later stage of their careers. In this case, late-stage artists are more likely than early stage artists to sell their work on their own website. Since proprietary websites tend to require a more significant investment (of time and/or resources) than social media and online commerce platforms, this result seems intuitive – late stage artists will have had more time to plan, finance and deploy a fully functional e-commerce platform, and even artists with slower technological adoption rates will be further along their adoption curve by the time they are ten or more years into their career.

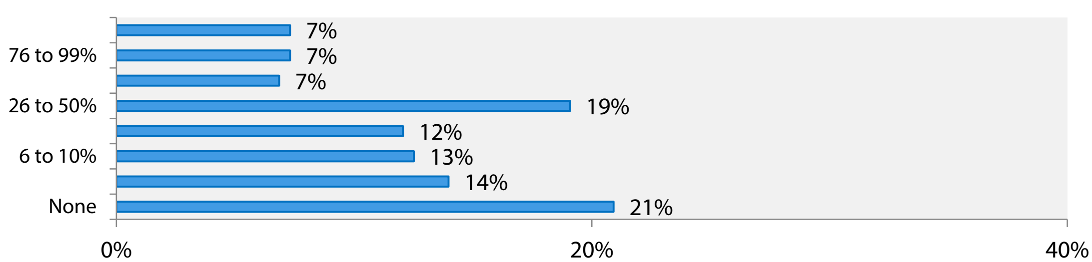
Figure 41: Types of online sales platforms used, by career stage (artists)



n=1,198
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that only 21% of artists generate more than half of their sales through online platforms. Moreover, nearly half of artists (48%) generate less than 10% of their sales online.

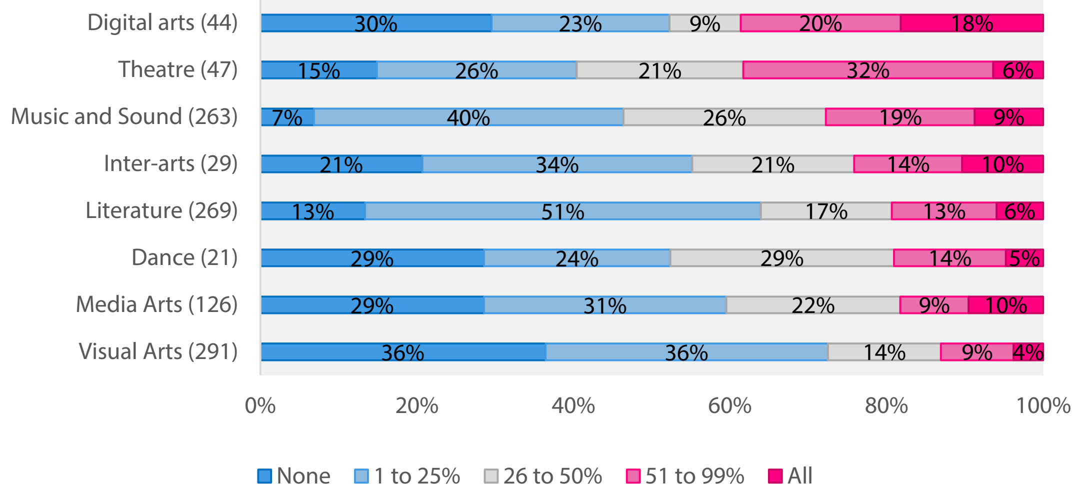
Figure 42: Percentage of sales from online sales platforms (artists)



n=1,096
source: Nordicity Arts in a Digital World survey (2016)

This high level of divergence may reflect differences between how appropriate online sales are to different disciplines. The following chart breaks out these responses by artistic discipline.

Figure 43: Percentage of sales from online sales platforms, by discipline (% of artists working in each discipline) (artists)

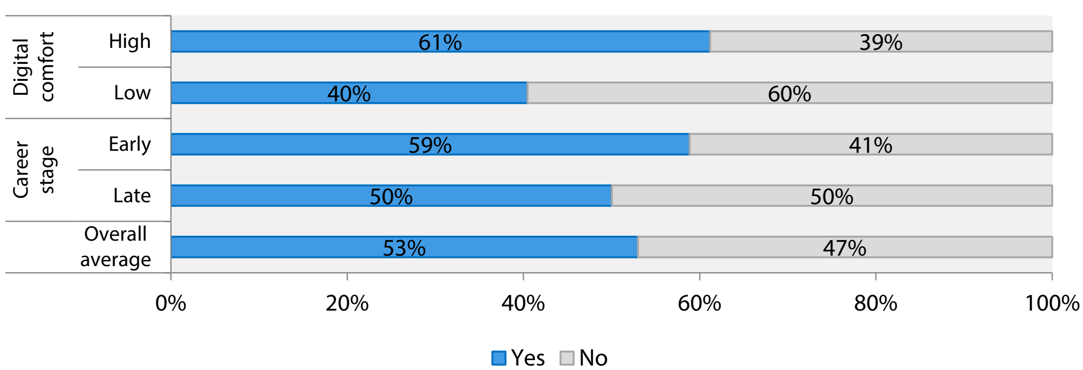


n=1,090
source: Nordicity Arts in a Digital World survey (2016)

As one might expect, digital arts lead the pack in terms of artists that generate more than 50% of their sales through digital platforms, followed closely by music and sound. Music, sound and literature report the lowest proportion of artists earning no revenues from digital platforms. This finding is somewhat expected, given the widespread availability of commercial platforms for sales of digital music formats and e-books. In contrast, such infrastructure seems to be less important to overall sales for visual artists, only 13% of whom report earning more than 50% of sales from online sources.

The following figure shows that over half (53%) of all artists use digital dissemination platforms.

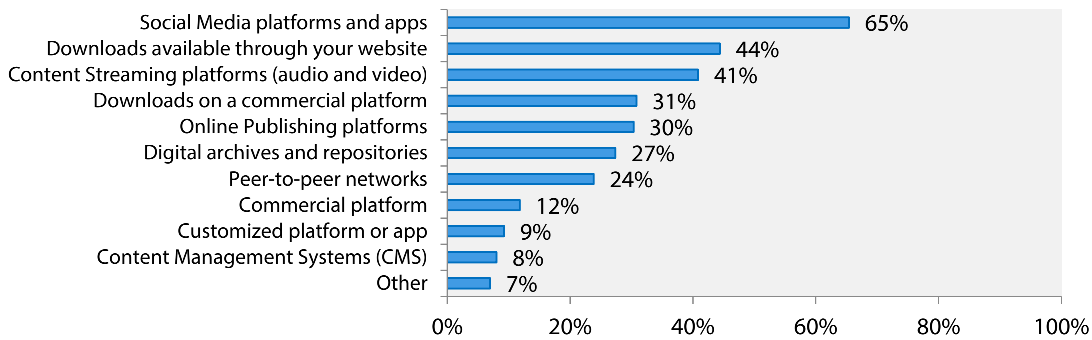
Figure 44: Use of digital dissemination platforms, by organization size and digital comfort (artists)



n=2,342
source: Nordicity Arts in a Digital World survey (2016)

Out of the artists that make use of digital dissemination platforms, the following chart shows the percentage of artists using each type.

Figure 45: Types of digital dissemination platforms used (artists)

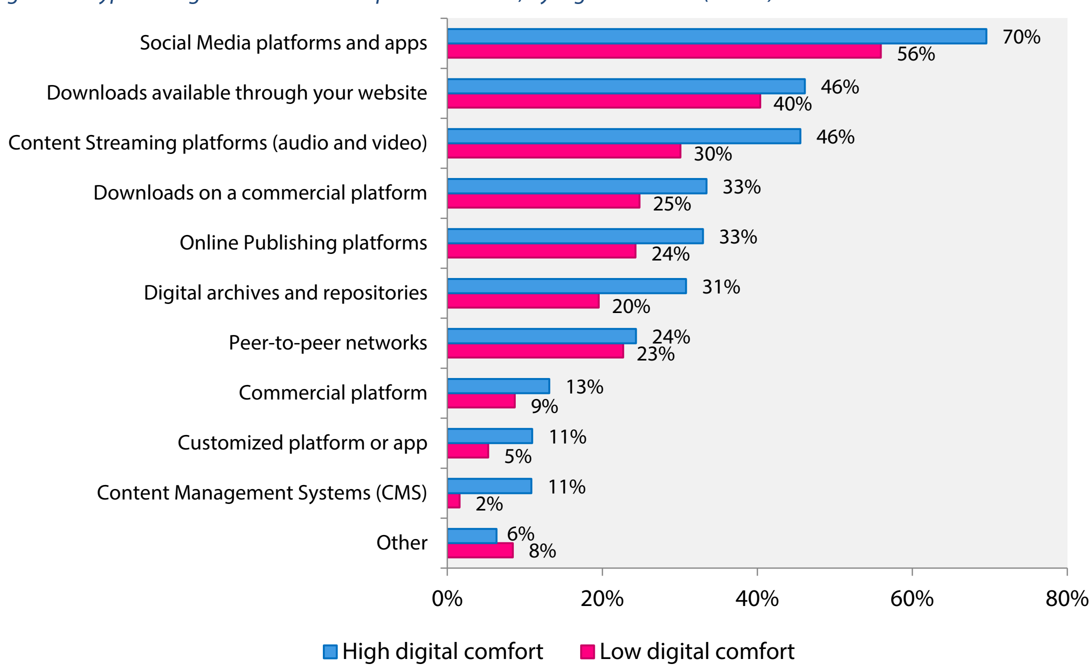


n=1,246
source: Nordicity Arts in a Digital World survey (2016)

Of these dissemination platforms, social media and apps are the dominant platforms, with self-hosted downloads and audio/video streaming following closely.

The chart below breaks out the preceding data by artists' level of digital comfort, showing that those with low digital comfort diverge from their more digitally comfortable counterparts least in the use of downloads through their own website and peer-to-peer networks.

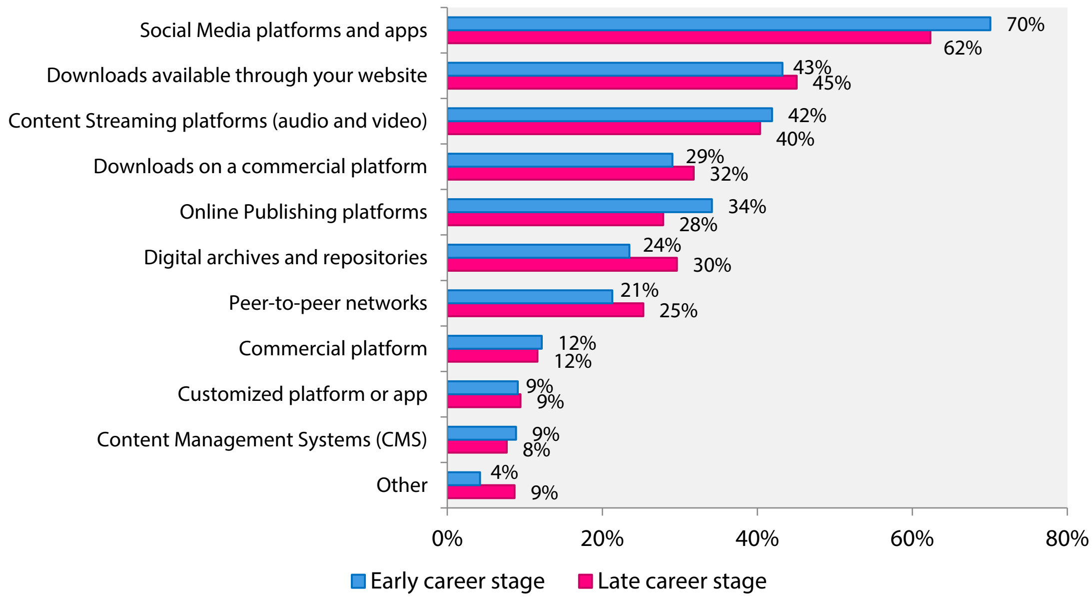
Figure 46: Types of digital dissemination platforms used, by digital comfort (artists)



n=1,246
source: Nordicity Arts in a Digital World survey (2016)

Breaking this data out by career stage, as illustrated in the following chart, it can be seen that late stage artists are more likely to disseminate content through: their own website; a commercial download platform; digital repositories; and peer-to-peer networks. This finding is consistent with the previous observation that established artists are more likely to conduct sales through their own website. Overall, these charts suggest that while more established artists are less likely to use the shared platforms embodied by social media, they tend to make up the shortfall with more fully functional proprietary websites.

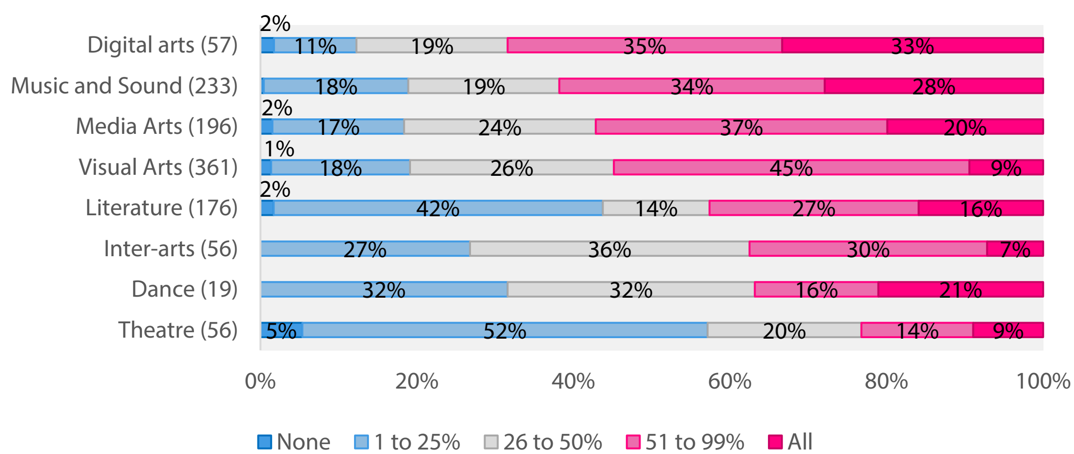
Figure 47: Types of digital dissemination platforms used, by career stage (artists)



n=1,234
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows the percentage of artists working in each discipline that reported disseminating various portions of their content on digital platforms.

Figure 48: Percentage of content appearing on digital platforms, by discipline (% of artists working in each discipline) (artists)

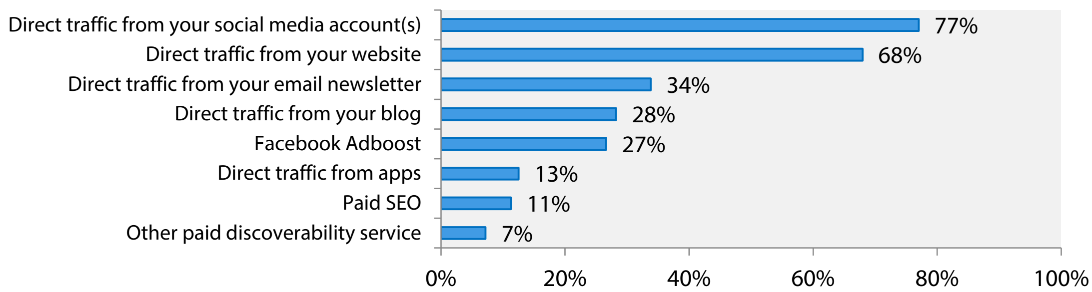


n=1,154
source: Nordicity Arts in a Digital World survey (2016)

Overall, the disciplines with the best online dissemination of their work are digital arts, music and sound, media arts, and visual arts. In each of these disciplines, over half of practitioners reported having over 50% of their content available on digital platforms.

The following chart shows that a majority of artists who use digital dissemination tools help audiences to discover content by directing traffic from their social media accounts and websites.

Figure 49: Ways to help audiences discover content (artists)

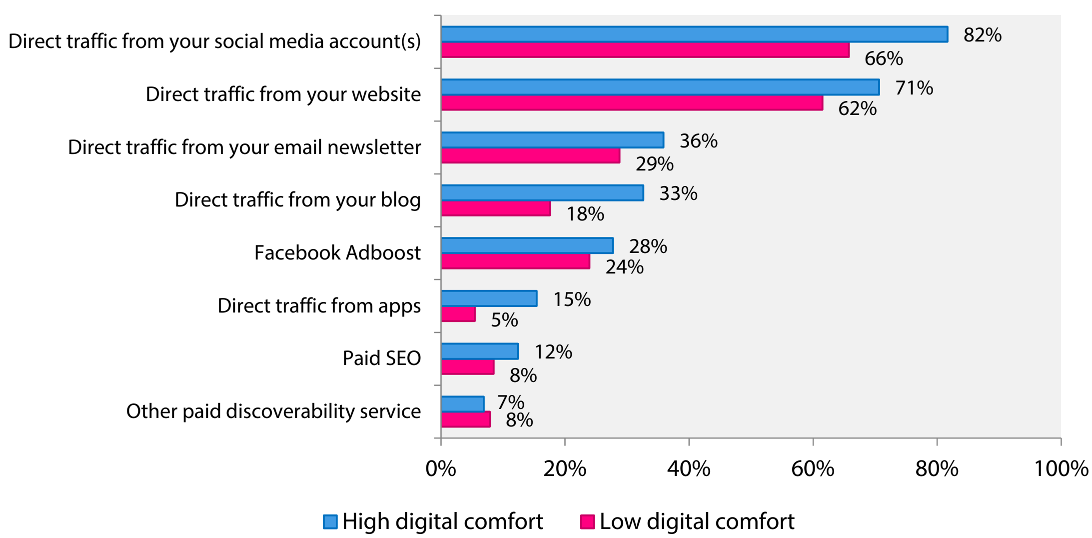


n=1,127
source: Nordicity Arts in a Digital World survey (2016)

Fewer artists overall directed traffic from email newsletters or blogs, however, 82% of the artists that use email newsletters as communication tools reported using this medium to help audiences discover content.

The following figure breaks this information out by artists' digital comfort level.

Figure 50: Ways to help audiences discover content, by digital comfort (artists)

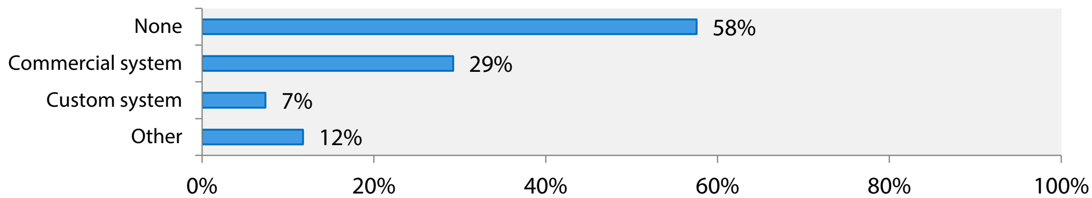


n=1,127
source: Nordicity Arts in a Digital World survey (2016)

Artists in the later stage of their careers are more likely to direct traffic from their email newsletter. This finding corresponds with the previous observation that this group of artists is more likely to use email newsletters.

The figure below shows that the majority of artists do not use online payment systems. Of those who do, commercial online payment systems are the most popular option.

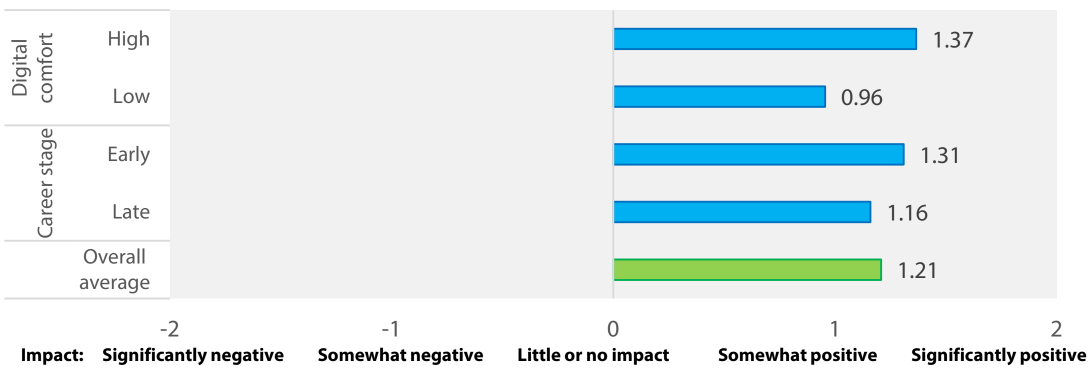
Figure 51: Types of online payment systems used (artists)



n=2,248
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows that digital technologies had an overwhelmingly positive impact on the dissemination of artists' work. In fact, 82% reported that they were satisfied (42%) or very satisfied (40%). Only 1% of artists reported that that digital technologies had a negative impact on dissemination.

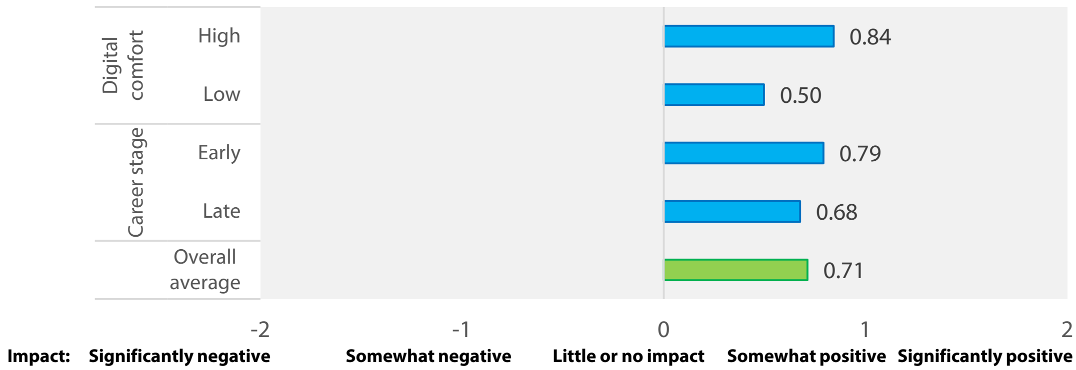
Figure 52: Impact of digital technologies on dissemination of artistic works, by digital comfort and career stage (artists)



n=2,245
source: Nordicity Arts in a Digital World survey (2016)

Overall, artists reported that digital technologies had a positive impact on sales, with 56% reporting a positive impact. Of these responses, 37% were somewhat positive while 19% were significantly positive. Only 3% of artists reported that that digital technologies had a negative impact on sales.

Figure 53: Impact of digital technologies on sales, by digital comfort and career stage (artists)



n=2,257
source: Nordicity Arts in a Digital World survey (2016)

2.3 Marketing and Communications

Artists and organizations were also asked to indicate their use of digital technologies to reach new and existing audiences. **The majority of arts organizations (54%) and artists (63%) spend more than half of communications time on online activities**. Similarly, 58% of organizations and 69% of artists maintain their own websites. According to organizations, the top purpose of having a website is promoting events and shows, followed by discoverability and dissemination. In contrast, individual artists prioritize discoverability and dissemination ahead of promoting events and shows. Both groups are engaged in social media, with Facebook being the most popular platform. In fact, **99% of organizations and 94% of individuals are active on Facebook**. In both cases, Twitter use lags by a significant margin.

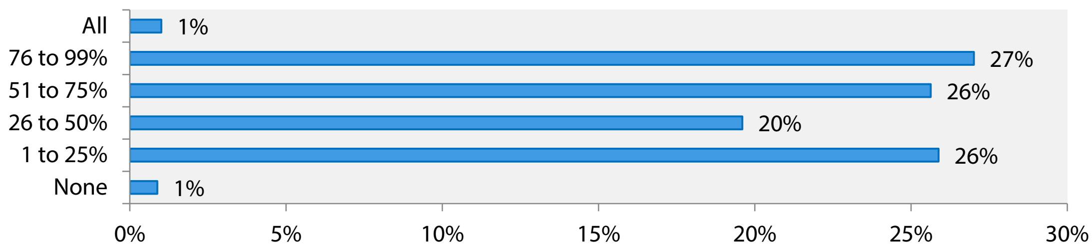
2.3.1 Arts organizations

Key Findings

- 54% of organizations devote more than have of total staff communications time to online activities.
- The top treason to have a website is to promote upcoming events or shows, followed by discoverability and dissemination of artistic works.
- 99% of arts organizations are active on Facebook while the next most common social media platforms are Twitter and Instagram.
- 61% of arts organizations use apps created by others whereas 23% have developed their own. The most common purpose of both types of apps are communication with the public whereas custom apps are more often used for discoverability of artwork and commercial apps provide mobile payment functionalities.

The following chart shows the distribution of responses with regards to the percentage of staff time devoted to online communications that occurs through digital channels, across all arts organizations. Overall, 54% of organizations reported that more than half of total staff time devoted to communications occurs online.

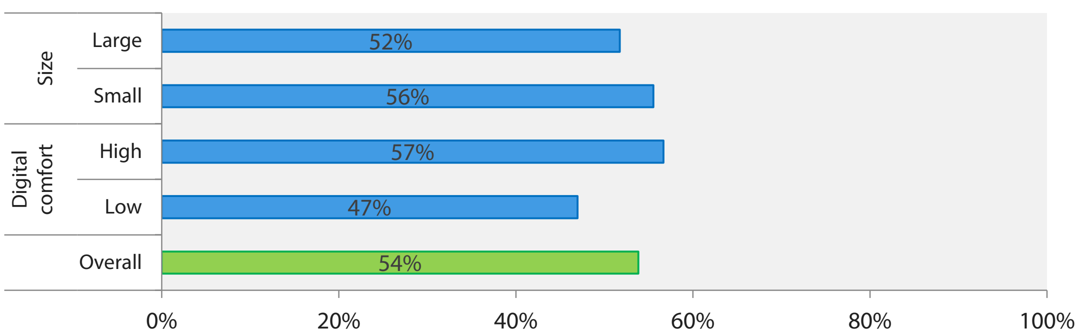
Figure 54: Staff time devoted to communications occurring through digital channels (arts organizations)



n=796
source: Nordicity Arts in a Digital World survey (2016)

In terms of the average percentages across organization size and level of digital comfort, digitally uncomfortable organizations do less of their communications work online than the overall average, as do large organizations, while small ones and digitally comfortable ones do slightly more, though the differences in each case are small.

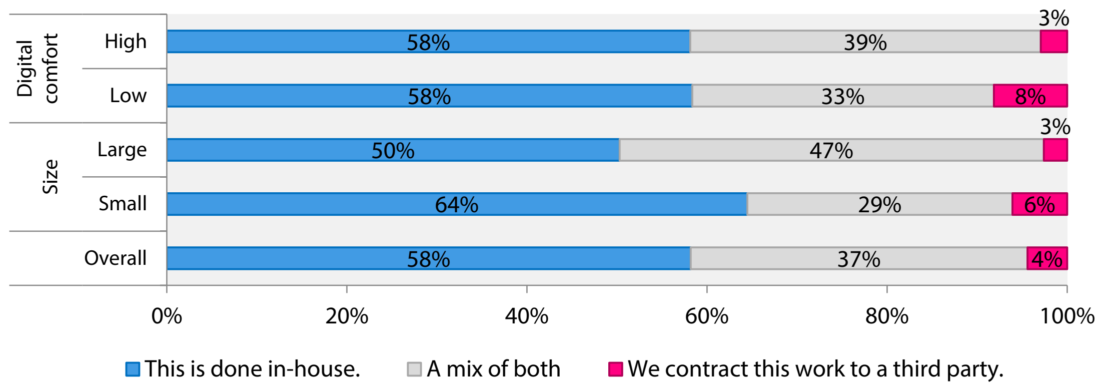
Figure 55: Average staff time devoted to online communications occurring through digital channels, by organization size and digital comfort (arts organizations)



n=796
source: Nordicity Arts in a Digital World survey (2016)

The chart below displays the ways that arts organizations maintain their websites. On average, a minority (4%) of organizations contract out web maintenance, while a majority (58%) do it entirely in-house. Very few organizations contract this work out to 3rd parties exclusively; more than half of all organizations do this work themselves. Small organizations in particular maintain their own websites almost two thirds of the time (64%).

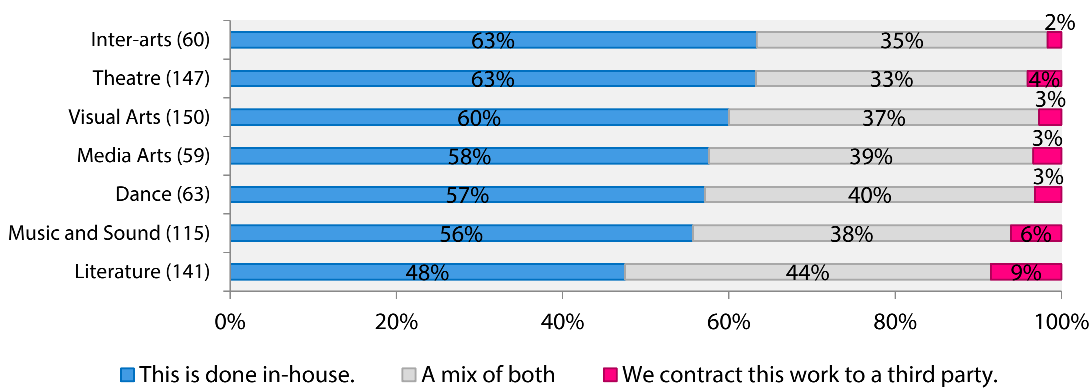
Figure 56: Website maintenance, by digital comfort and organization size (arts organizations)



n=770
source: Nordicity Arts in a Digital World survey (2016)

When broken out by discipline, the chart below shows that literature organizations are most likely to contract out web maintenance, followed by music and sound organizations. In fact, literature is the only discipline for which less than half (48%) of organizations manage their websites exclusives in-house. In contrast, inter-arts organizations have the highest level of in-house maintenance (63%) and the lowest level of contracting out of this task (2%).

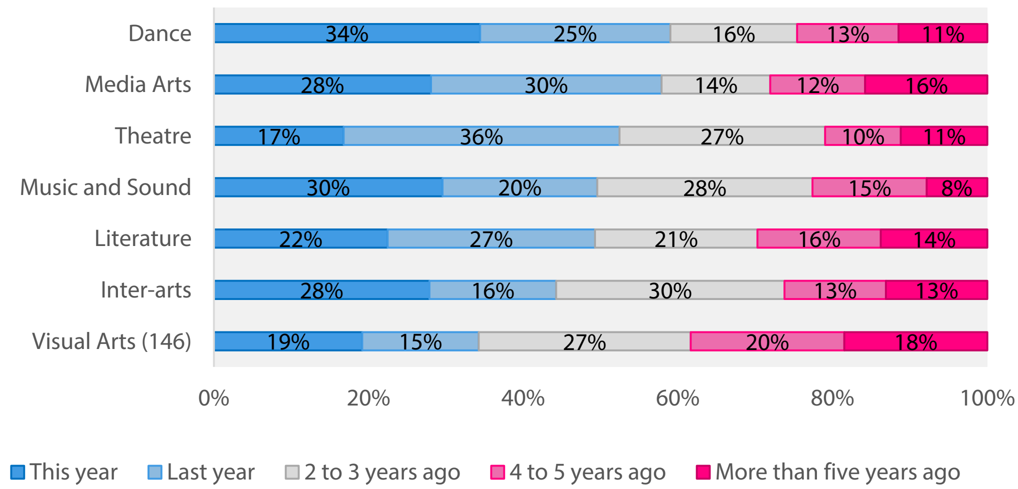
Figure 57: Website maintenance, by discipline (arts organizations)



n=735
source: Nordicity Arts in a Digital World survey (2016)

The following table shows that visual arts organizations update their websites least frequently, while most organizations in the media arts and dance have made major changes to their website more recently (i.e., within the last two years).

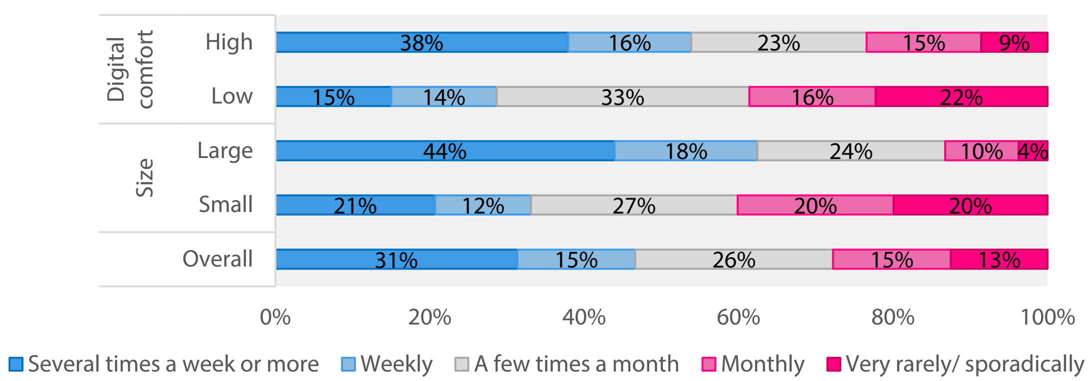
Figure 58: Time elapsed since last major website update, by discipline (arts organizations)



n=731
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows how often organizations post to their websites. Large organizations and those with higher levels of digital comfort post the most frequently and on average just under half (46%) of all organizations post at least once a week.

Figure 59: Frequency of website posts, by digital comfort and organization size (arts organizations)

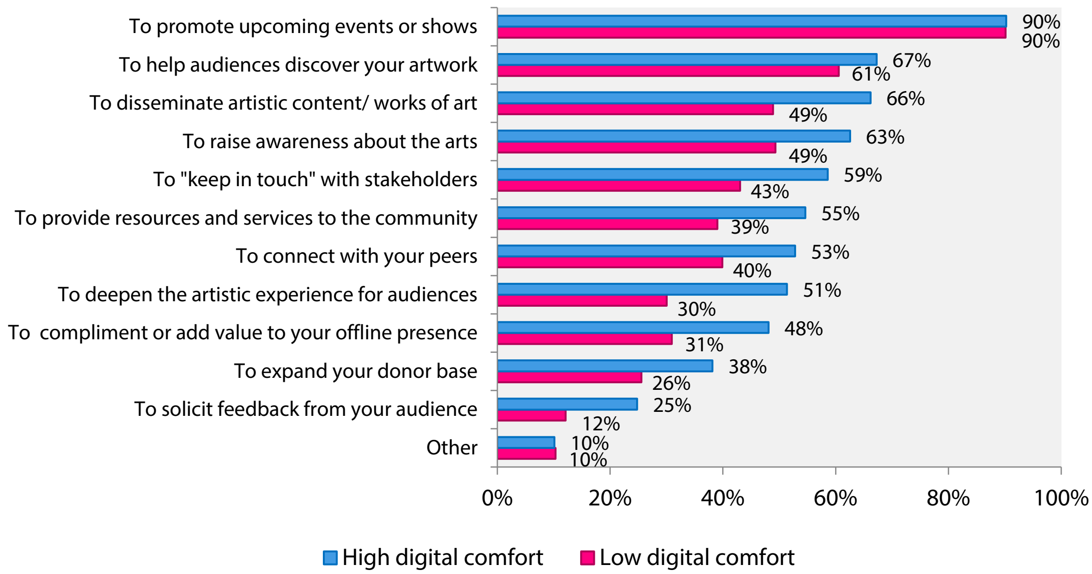


n=766
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows the purpose of websites, according to organizations with different levels of digital comfort. The top reason for maintaining a website is equally common among both groups, which reinforces the importance of sharing events and shows online. For the other areas, organizations with higher levels of digital comfort lead in comparison to their less comfortable peers. The greatest discrepancies based on digital comfort can be seen in deepening the artistic experience for audiences and in complimenting offline activities. These differences suggest that organizations with lower digital comfort are less able to connect online engagement to in-person experiences.

Although not shown, when compared by organization size, small organizations lag slightly behind large organizations in most areas however they are more likely to see their websites as ways to connect with peers and disseminate content.

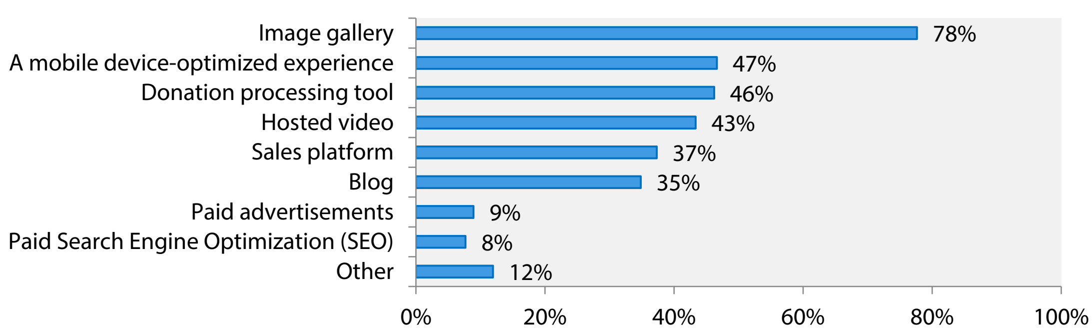
Figure 60: Purposes of website, by digital comfort (arts organizations)



n=778
source: Nordicity Arts in a Digital World survey (2016)

As the following chart shows, image galleries are by far the most common website feature for organizations. In contrast, the next most popular features (mobile experience, donation processing tool and hosted video) are found on less that half of websites.

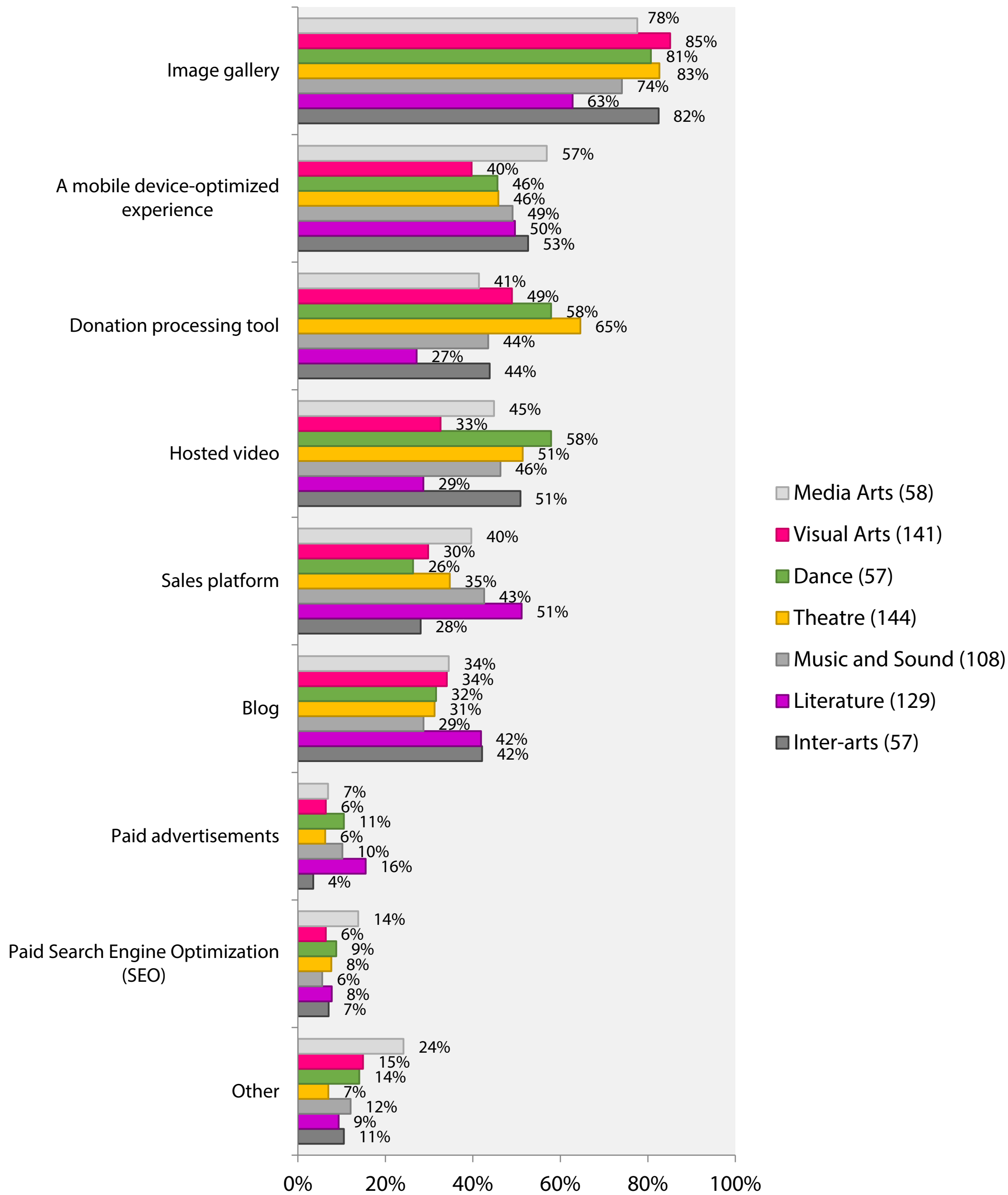
Figure 61: Website features (arts organizations)



n=729
source: Nordicity Arts in a Digital World survey (2016)

When broken down by discipline, website features reveal several predictable patterns, as the chart below shows. Image galleries are most prevalent among visual arts and inter-arts organizations while video hosting is most common for dance and theatre organizations. These findings are consistent with the nature of the different art forms. In terms of monetizing websites, more than half of dance and theatre organization websites have donation processing tools while sales platforms are most likely to be used by literature and music and sound organizations.

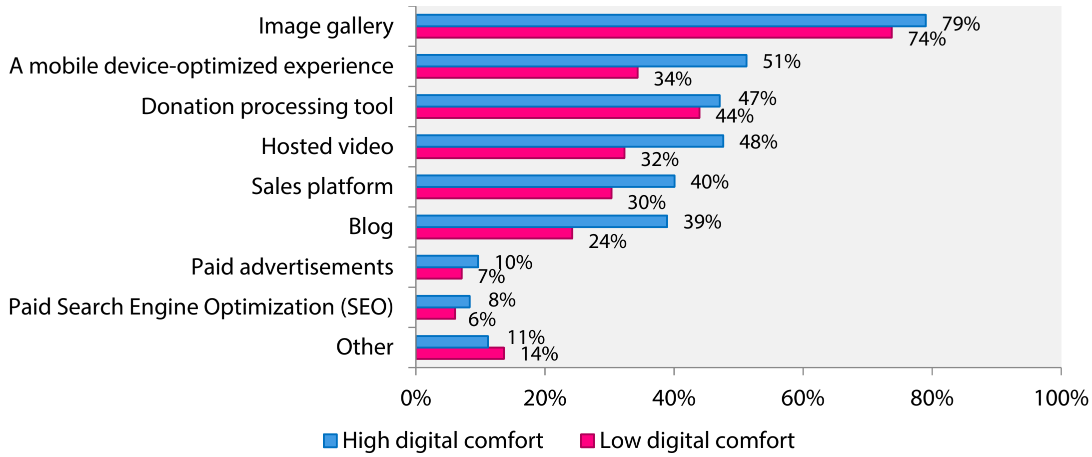
Figure 62: Website features, by discipline (arts organizations)



n=694
source: Nordicity Arts in a Digital World survey (2016)

The following table shows website features broken down by organizations' levels of digital comfort. As has been remarked elsewhere, the smallest discrepancy is seen in the most popular option, in this case image galleries. In contrast, digitally uncomfortable organizations are significantly less likely to offer mobile experiences, video hosting or blogs on their websites.

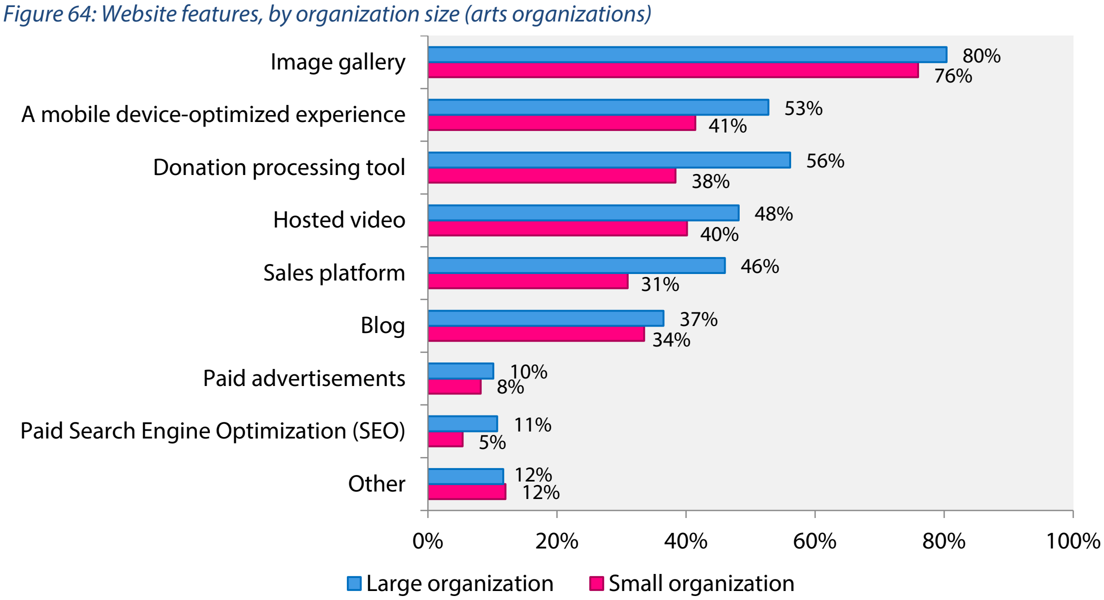
Figure 63: Website features, by digital comfort (arts organizations)



n=729
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows that large organizations lead small organizations in website features. The greatest discrepancies are in the use of donation processing tools and sales platforms. These findings suggest that small organizations are less able to monetize their websites.

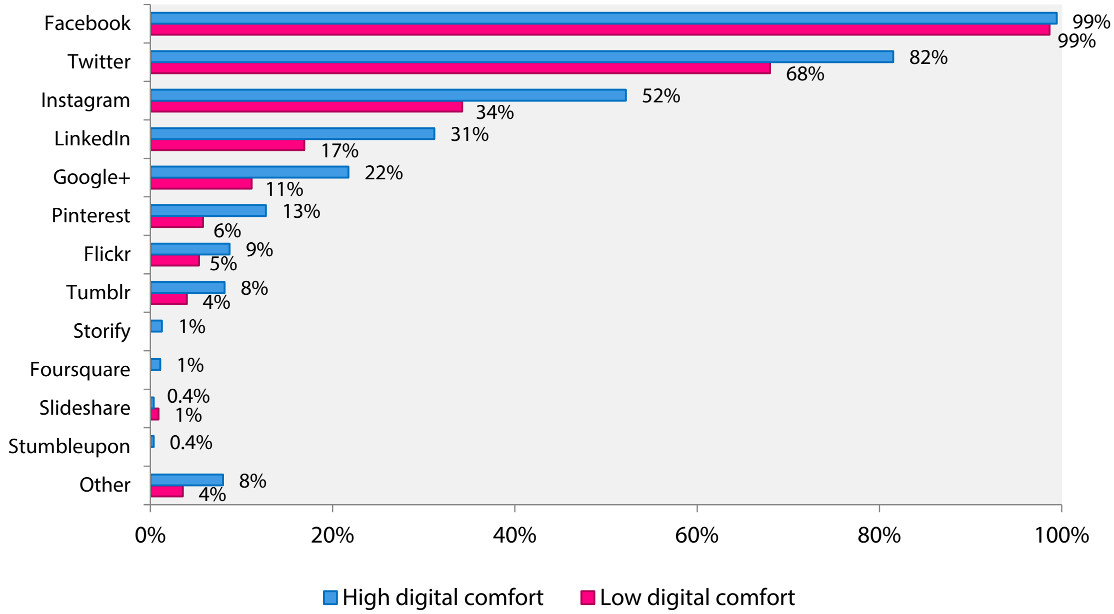
Figure 64: Website features, by organization size (arts organizations)



n=729
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows that although organizations with different levels of digital comfort are equally like to use Facebook, those with lower levels of digital comfort lag behind in the use of all other social media platforms. The same is true of small organizations.

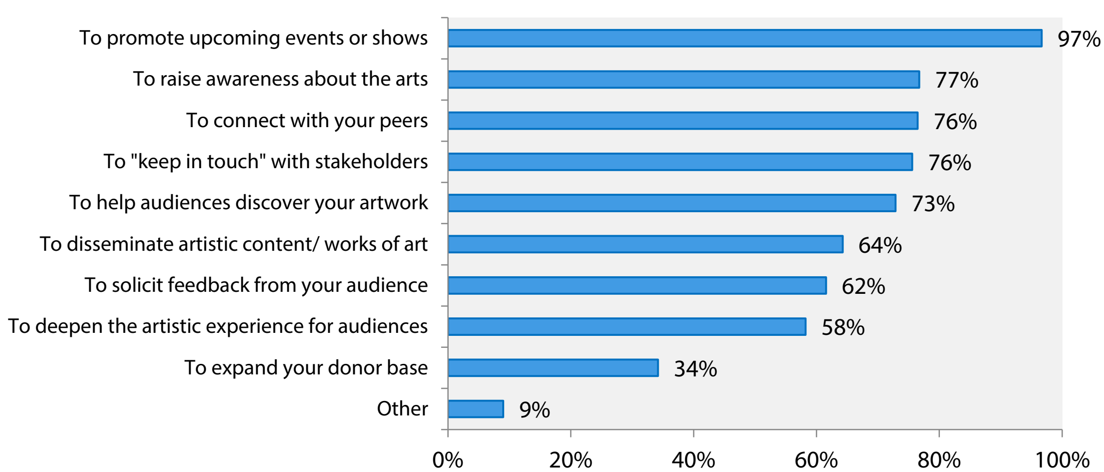
Figure 65: Social media platforms used by digital comfort (arts organizations)



n=778
source: Nordicity Arts in a Digital World survey (2016)

The chart below indicates that the most common use of social media is to promote upcoming events or shows, while only about one third of organizations use these tools to expand their donor base.

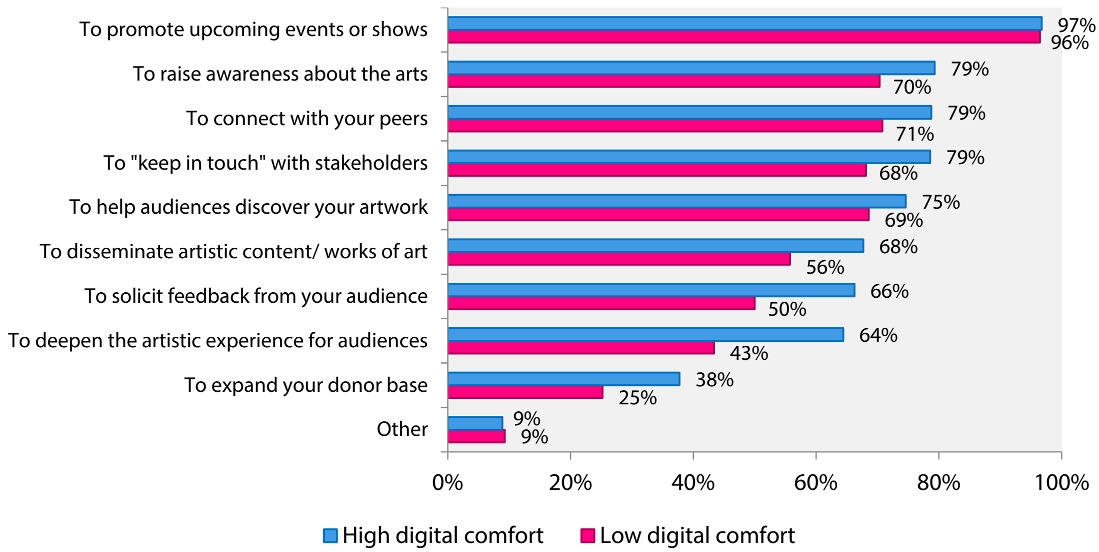
Figure 66: Purposes of social media (arts organizations)



n=778
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows that more digitally comfortable organizations lead in comparison to their less comfortable peers. The greatest discrepancy can be seen in the use of social media to deepen the artistic experience for audiences and solicit feedback from audiences. This finding suggests that less comfortable organizations are less likely to engage with their audiences using digital tools. Similar trends can be observed for small organizations, although the differences are less pronounced.

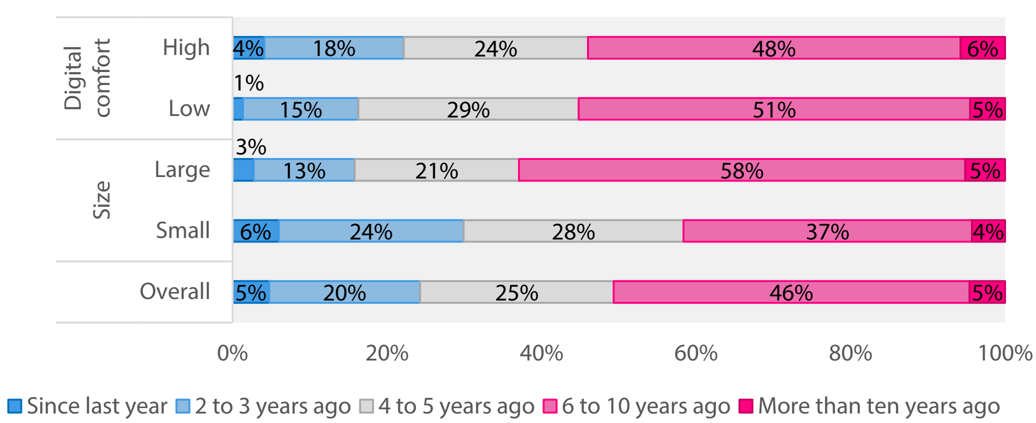
Figure 67: Purposes of social media, by digital comfort (arts organizations)



n=778
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows that half of organizations have been engaged on social media for more than five years. This finding is true for 63% of larger organizations but only 54% of digitally comfortable organizations. This comparison suggests that, in terms of duration of engagement with social media, size is a greater predictor than digital comfort.

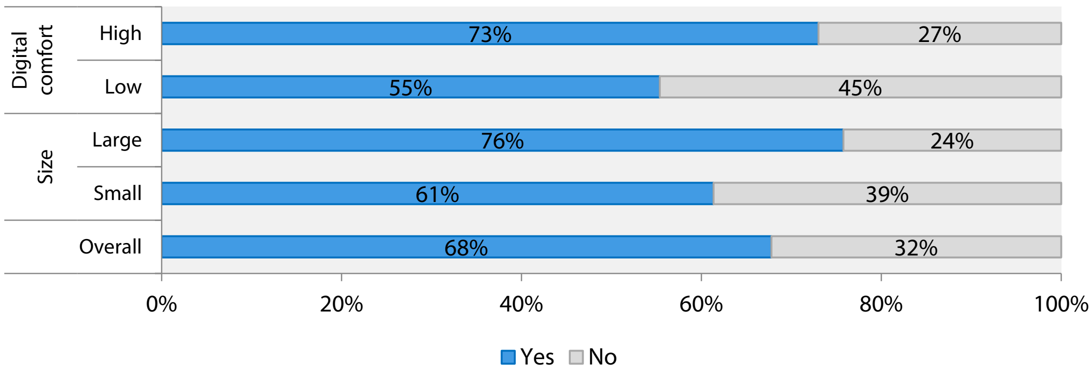
Figure 68: Duration of engagement with social media (arts organizations)



n=758
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows that the majority (68%) of arts organizations use video as a communications tool. The use of video is most prevalent among large organizations, 76% of which take advantage of this technology. Organizations that use video post an average of 7.5 per month.

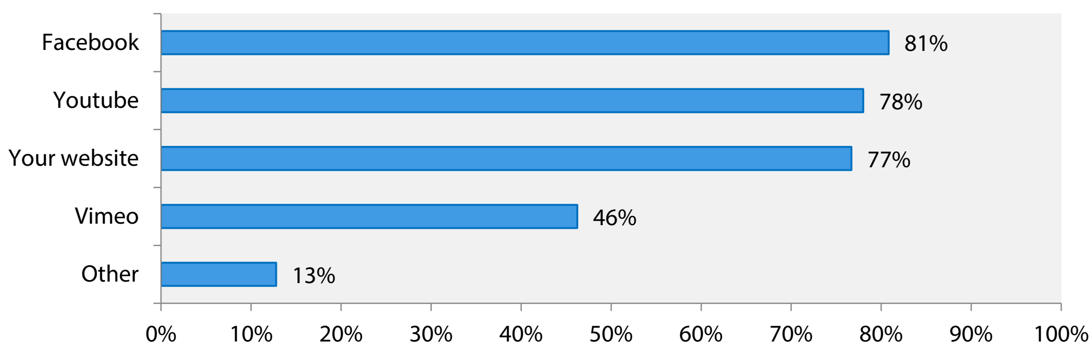
Figure 69: Use of video as a communications tool, by digital comfort and organization size (arts organizations)



n=810
source: Nordicity Arts in a Digital World survey (2016)

The following chart illustrates that Facebook is the most common platform for video content, closely followed by YouTube and organizations' own websites. Digitally comfortable organizations have a small lead on their less comfortable peers where small organizations are slightly more like than large organization to use Facebook to share videos.

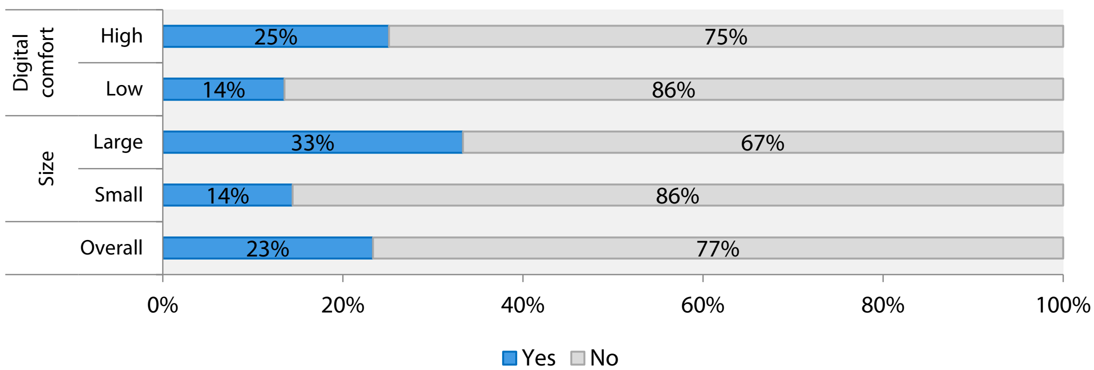
Figure 70: Platforms used for video content (arts organizations)



n=532
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows that less than one quarter (23%) of all organizations have created apps. There is a marked different by organization size, with large organizations more than twice as likely to have done so that small organizations. This difference is less pronounced when broken down by digital comfort, although still notable.

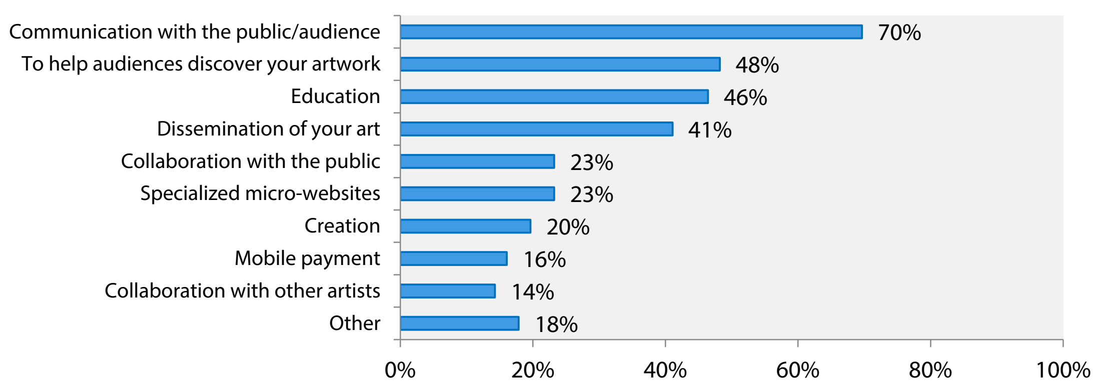
Figure 71: Incidence of app creation (arts organizations)



n=240
source: Nordicity Arts in a Digital World survey (2016)

The following chart indicates that the most common reason for creating an app is to communicate with the public. In contrast, discoverability and education, which are the next most popular purposes, are cited by less than half of organizations.

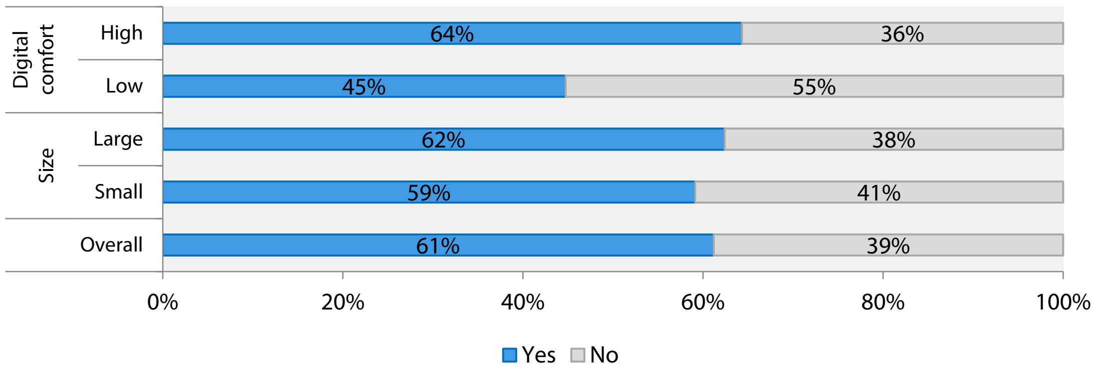
Figure 72: Purposes of created apps (arts organizations)



n=56
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows that the majority (61%) of organizations have used apps developed by a third party. This trend is slightly more prevalent among digitally comfortable organizations, 64% of which indicated using other apps.

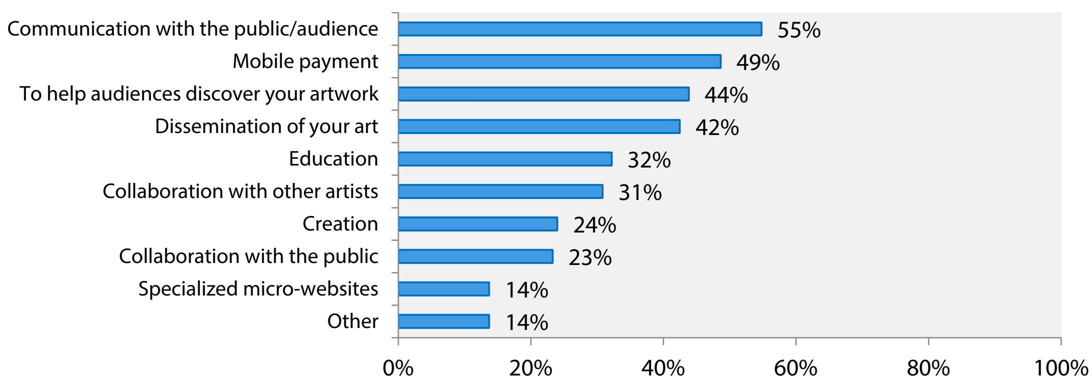
Figure 73: Incidence of use of other apps (arts organizations)



n=237
source: Nordicity Arts in a Digital World survey (2016)

Although the most common purpose of other apps echoes that of created apps, the other reasons for using this technology diverge. As can be seen below, mobile payment is the second most common reason for using these apps, whereas it is one of the least common reasons for using custom apps. This suggests that commercially-available apps are better-suited to monetization than apps developed for specific organizations.

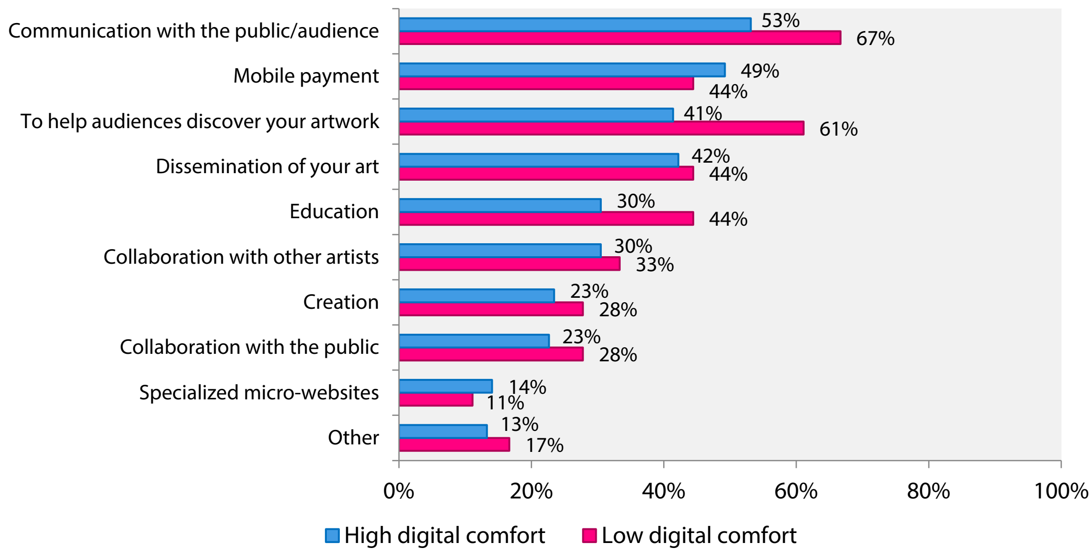
Figure 74: Purposes of apps created by others (arts organizations)



n=145
source: Nordicity Arts in a Digital World survey (2016)

The following chart illustrates that low digital comfort organizations are almost always more likely to use apps created by others. The notable exception is in the use of mobile payment apps, which are slights more common among high comfort organizations. Once again, this finding suggests that organizations with higher levels of digital comfort are more likely use digital technology to increase revenues.

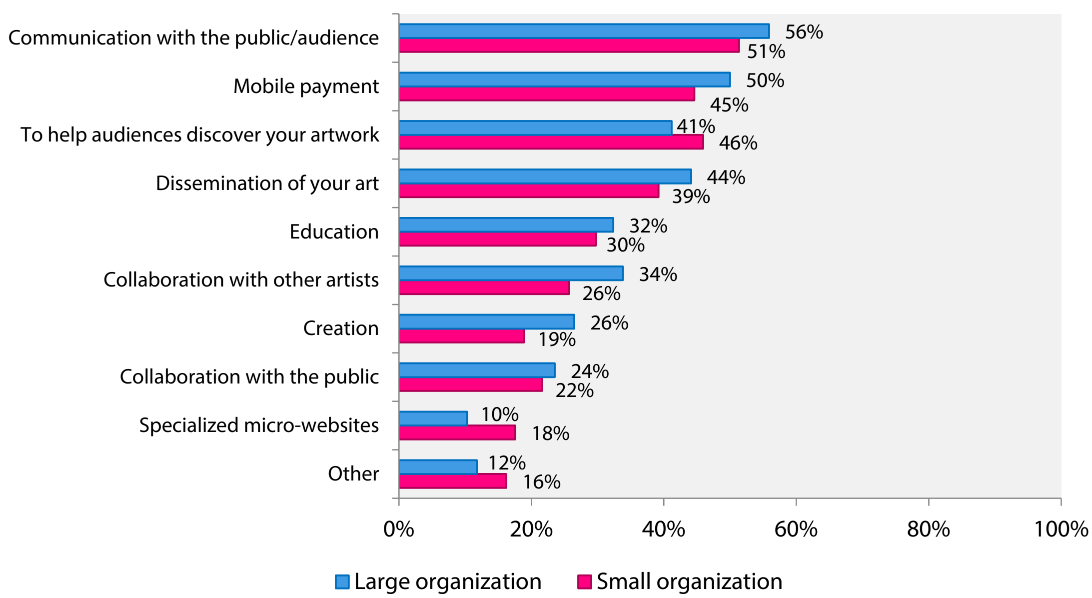
Figure 75: Uses of apps created by others, by digital comfort (arts organizations)



n=145
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows that large organizations are generally more likely to use apps made by others. The exception is that discoverability and specialized micro-sites are more prevalent responses among small organizations. The greatest discrepancy is in the use of apps to facilitate collaboration with other artists, which is more often cited by large organizations.

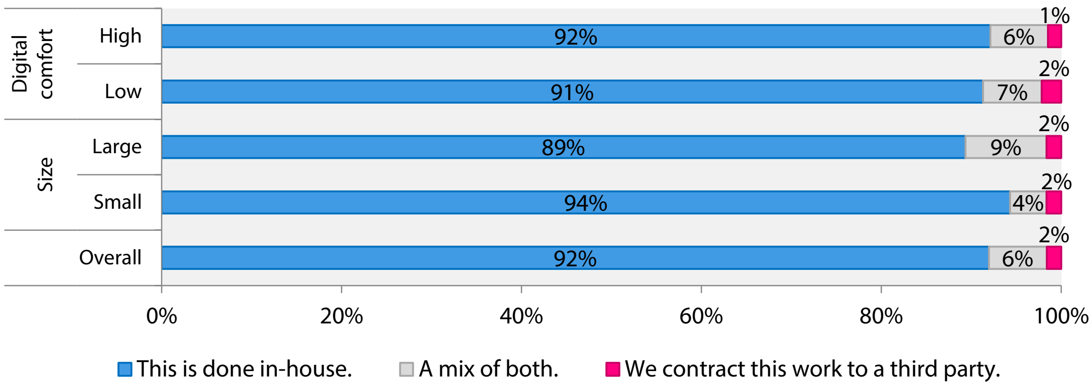
Figure 76: Uses of apps created by others, by organization size (arts organizations)



n=145
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows that the clear majority of arts organizations that use blogs maintain their own, with an average of only 2% of survey respondents contracting this work out.

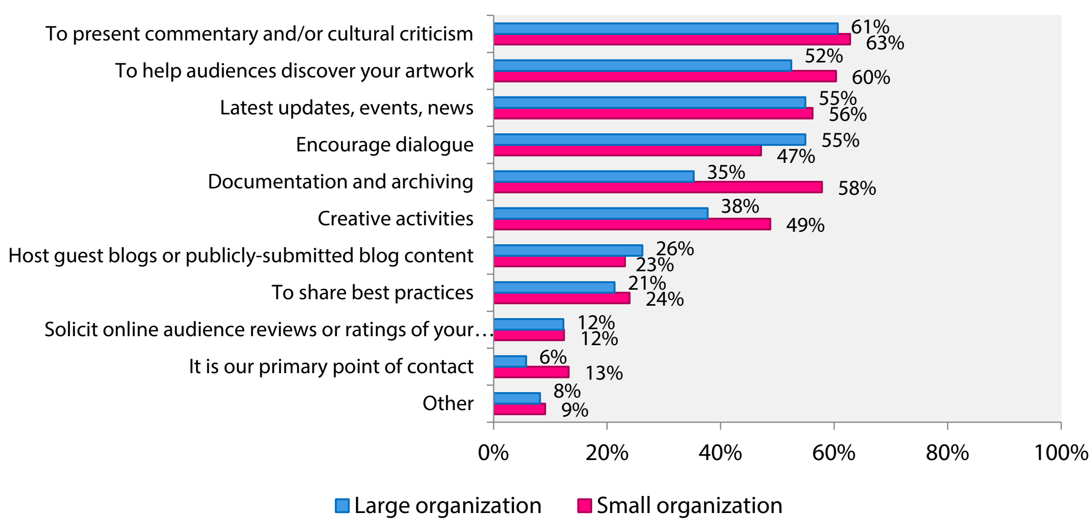
Figure 77: Blog maintenance (arts organizations)



n=249
source: Nordicity Arts in a Digital World survey (2016)

On average, blogs are most often used to present commentary/cultural criticism, help audiences discover artwork and provide updates on news and events. However, when the preceding data is broken down by organization size, it is clear that small organizations are more like to use blogs in all cases. The greatest discrepancies are seen in the use of blogs for documentation and archiving as well as creative activities. This finding suggests that small organizations are more adept at making their blogs perform a range of both administrative and artistic functions. In terms of level of digital comfort, less comfortable organizations' responses lag behind their more comfortable peers.

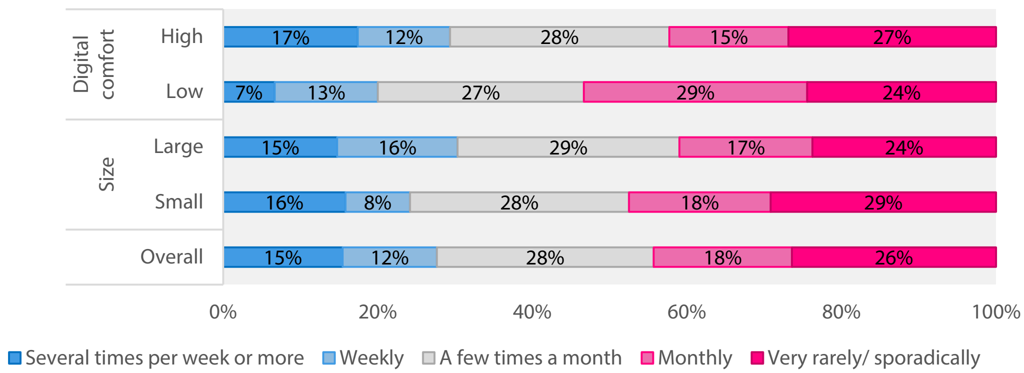
Figure 78: Purposes of blog, by organization size (arts organizations)



n=247
source: Nordicity Arts in a Digital World survey (2016)

The chart below indicates that the majority (55%) of arts organizations post to their blogs more than once a month.

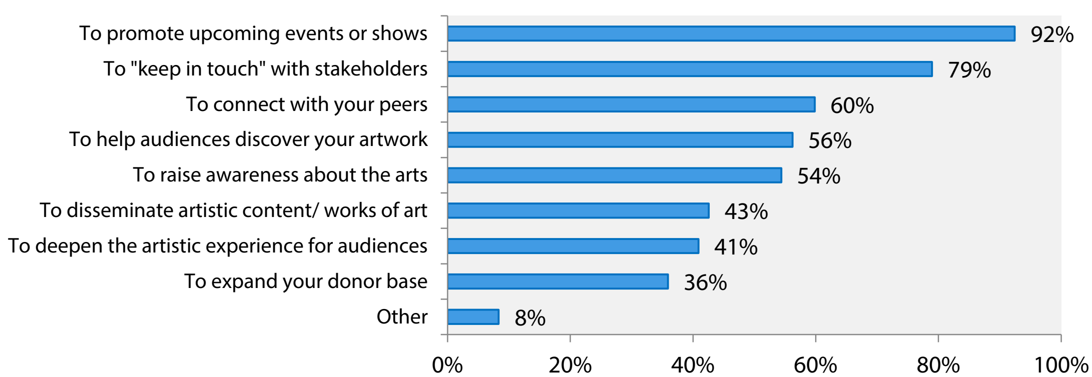
Figure 79: Frequency of blog posts, by digital comfort and organization size (arts organizations)



n=246
source: Nordicity Arts in a Digital World survey (2016)

The following chart illustrates that email newsletters are most often used to promote upcoming events or shows, "keep in touch" with stakeholders or connect with peers. A majority of email newsletter users also cited helping audiences discover artwork as well as more generally raising awareness about the arts. Small and low digital comfort organizations lag slightly in each area, although these results are not shown graphically.

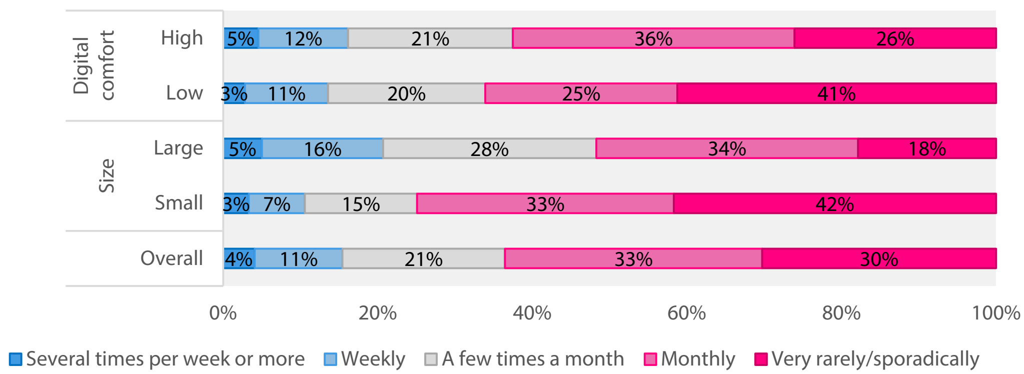
Figure 80: Purposes of email newsletters (arts organizations)



n=660
source: Nordicity Arts in a Digital World survey (2016)

As can be seen below, the majority of organizations (70%) that use email newsletters do so at least once a month. This trend is strongest among large organizations.

Figure 81: Frequency of email newsletters, by digital comfort and organization size (arts organizations)



n=661
source: Nordicity Arts in a Digital World survey (2016)

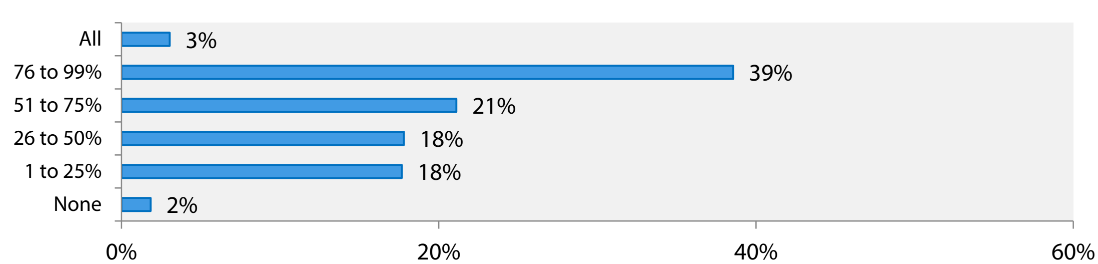
2.3.2 Artists

Key Findings

- 63% of artists spend over half of the total communications time using online channels
- The top reasons that artists have websites are for discoverability and dissemination.
- 69% of artists maintain their own websites but this figure varies considerably by discipline with 81% of digital artists and 65% of dancers managing maintenance.
- 94% of artists use Facebook whereas 53% use Twitter and 51% use LinkedIn, the next most prevalent social media platforms. The majority of artists do not distinguish between personal and professional social media accounts, regardless of the platform.

The following figure shows that 63% of artists spend over half of the total time spent on communications working across online channels. Conversely, just 2% of artists indicated they spend no time on online communications.

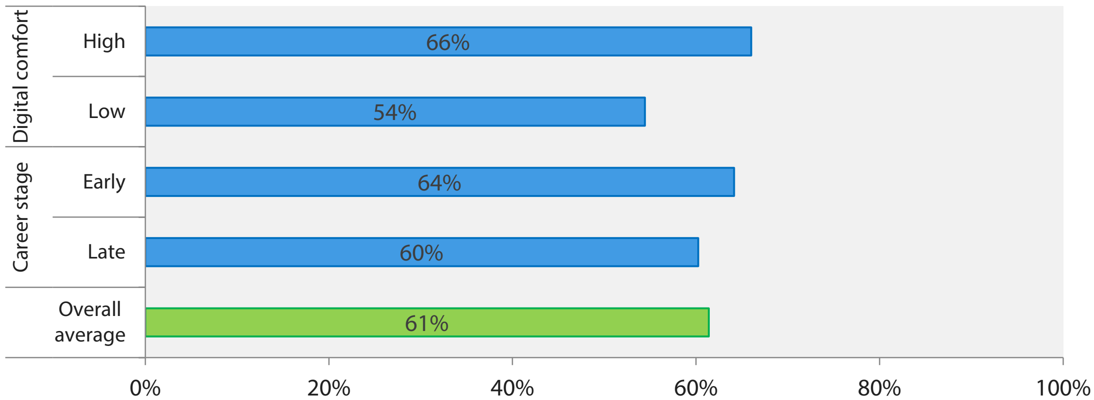
Figure 82: Time devoted to communications that occurs via online channels (artists)



n=2,237
source: Nordicity Arts in a Digital World survey (2016)

As the chart below illustrates, the average percentage of communications time spent on online channels (calculated from the preceding data) varies depending on artists' level of digital comfort and career stage. On average, artists spend 61% of communications time working online but for digitally comfortable individuals this figure increases 66%.

Figure 83: E1. Average time devoted to communications that occurs via online channels, by digital comfort and career stage (artists)

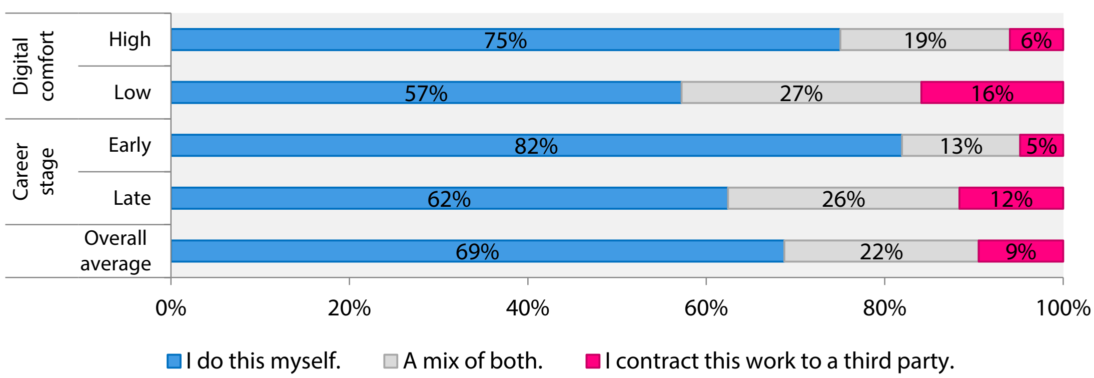


n=2,237
source: Nordicity Arts in a Digital World survey (2016)

Despite these differences, the variation between artists with different levels of digital comfort and at different stages of their careers is comparatively small. This finding suggests that online channels are important to all types of artist.

The following chart shows that over two thirds of artists (69%) perform their own website maintenance.

Figure 84: Website maintenance, by digital comfort and career stage (artists)

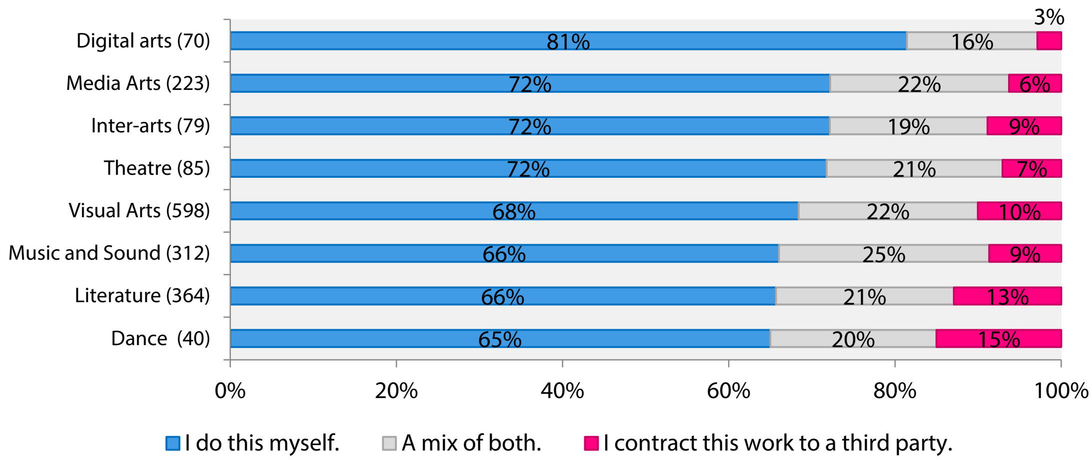


n=1,786
source: Nordicity Arts in a Digital World survey (2016)

This finding is unusual, as far as the comparison between artists with different levels of digital comfort and those in different stages of their careers is concerned. In previous comparisons, the difference between responses by the digital comfort groups tends to significantly exceed that exhibited by the early and late career stage groups. In this case, artists of low digital comfort and those in the later stages of their careers are both more likely to employ third party services for website maintenance.

The following chart confirms that digital arts practitioners are more likely to maintain their own website (by a large margin), whereas dance, literature and music/sound artists are more likely to contract this work to a third party. In fact, artists working in dance are five times more likely to contract out website maintenance than digital artists.

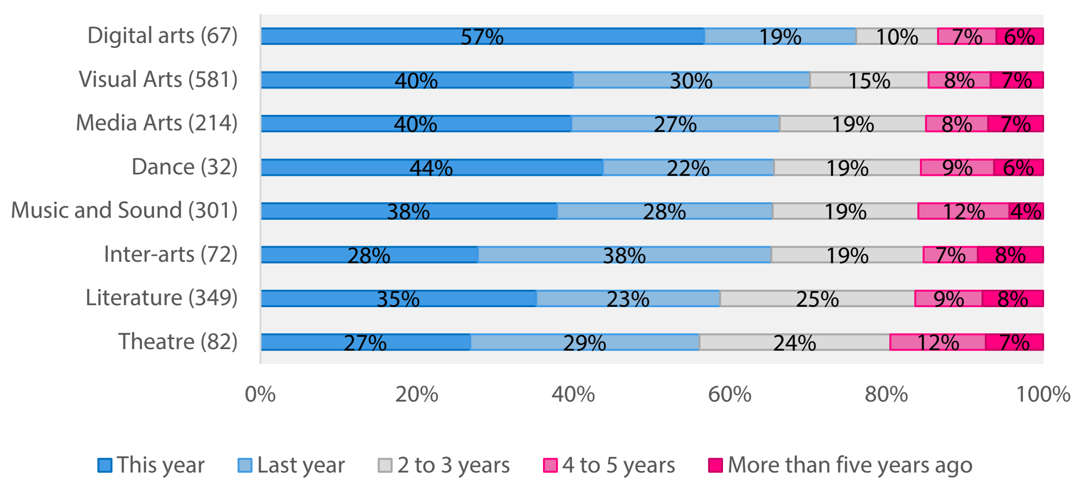
Figure 85: Website maintenance, by discipline (artists)



n=1,782
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that artists working in digital arts and visual arts are also the most likely to have made a major update or redesign of their website recently. However, digital arts are the only discipline in which a strong majority of artists reported updating their websites this year. In contrast, a significant portion of each discipline has not made major changes to their websites in at least four years.

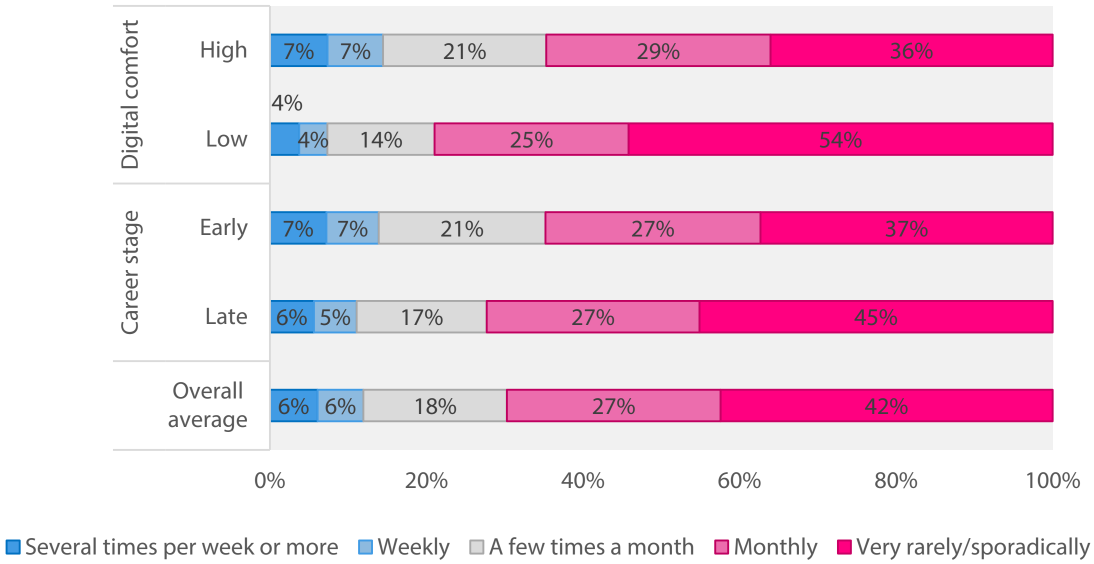
Figure 86: Time elapsed since last major website update, by discipline (artists)



n=1,709
source: Nordicity Arts in a Digital World survey (2016)

Apart from more substantial changes to the look and feel of websites, the following figure shows that most artists add content to their websites at least monthly. Artists with a high level of digital comfort and those in the early stages of their careers tend to update their websites most frequently.

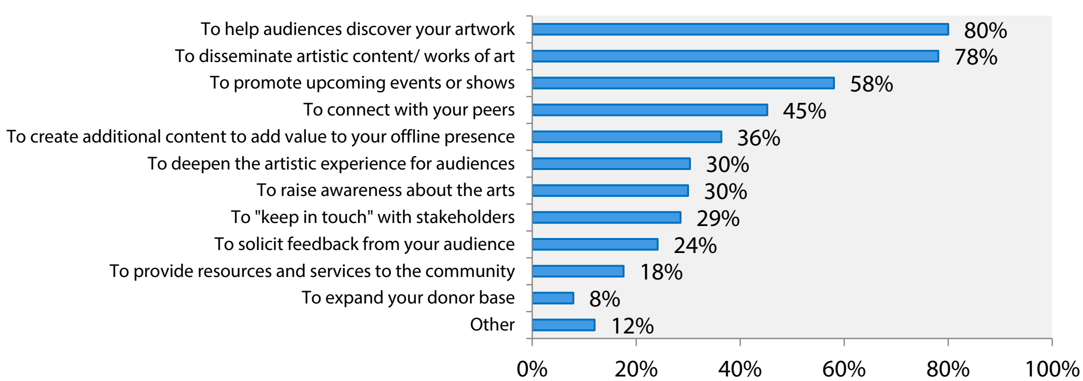
Figure 87: Frequency of website updates, by digital comfort and career stage (artists)



n=1,740
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows that artists' primary purposes in having websites are to facilitate discovery and disseminate their work. More than half of survey respondents also indicated that they use their websites to promote upcoming events. In contrast, expanding the donor base is the least common use of websites.

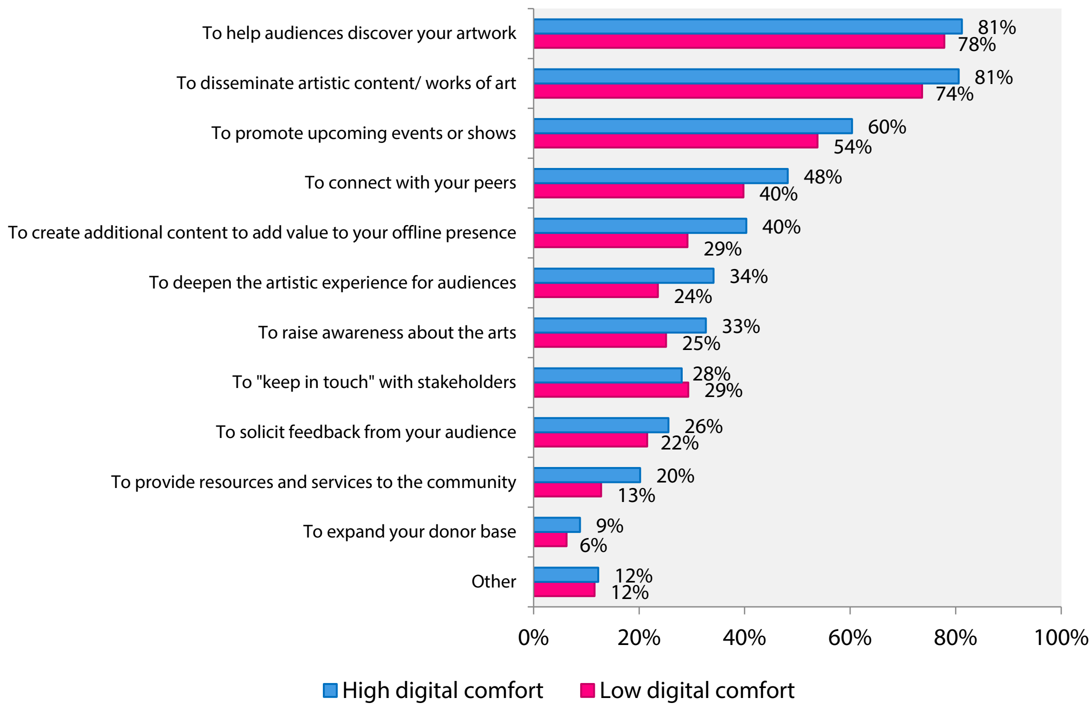
Figure 88: Purposes of websites (artists)



n=1,799
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that the priorities of artists with a lower level of digital comfort is similar, with these artists exhibiting a slight preference for keeping in touch with stakeholders.

Figure 89: Purposes of websites, by digital comfort (artists)

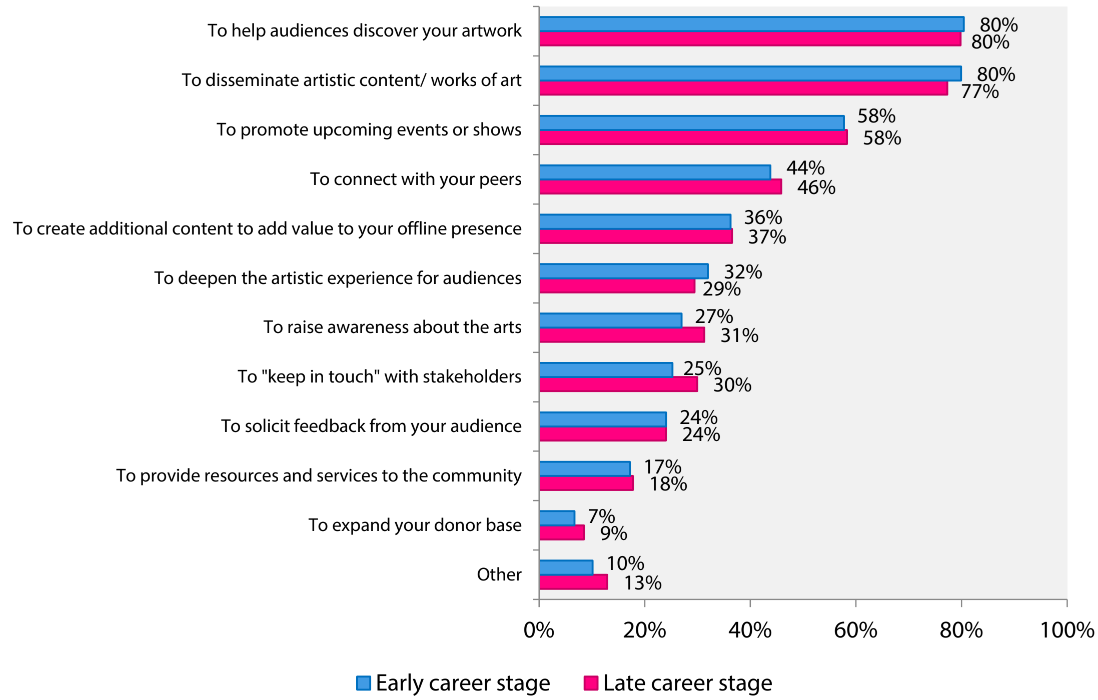


n=1,781
source: Nordicity Arts in a Digital World survey (2016)

Additionally, artists with a low level of digital comfort tend to have fewer reasons for having a website, specifying only 4.0 purposes for their website, in contrast to the average 4.7 purposes cited by their more digitally comfortable counterparts. This finding could suggest that less digitally comfortable artists are less aware of what websites can be used for in the context of their creative practices.

The following diagram shows that more established artists are slightly more likely to view their websites as a medium through which to present supplemental content and network with other artists, whereas less experienced artists are more likely to emphasize their website's function as a promotional channel (i.e. to promote discovery and disseminate their work).

Figure 90: Purposes of websites, by career stage (artists)

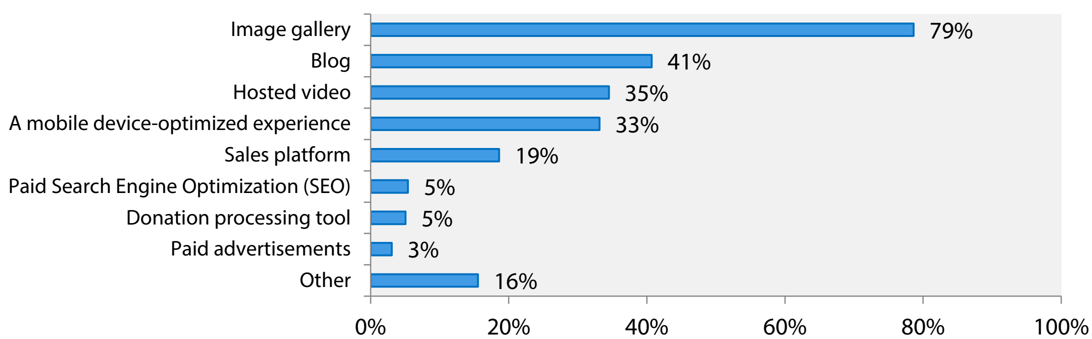


n=1,799
source: Nordicity Arts in a Digital World survey (2016)

As can be seen above, career stage has the greatest impact on keeping in touch with stakeholders: 30% of established artists use their websites to do so, compared with only 25% of emerging artists.

The survey also asked artists about the components of their websites. The following figure shows that an image gallery is the most common feature that artists include on their website.

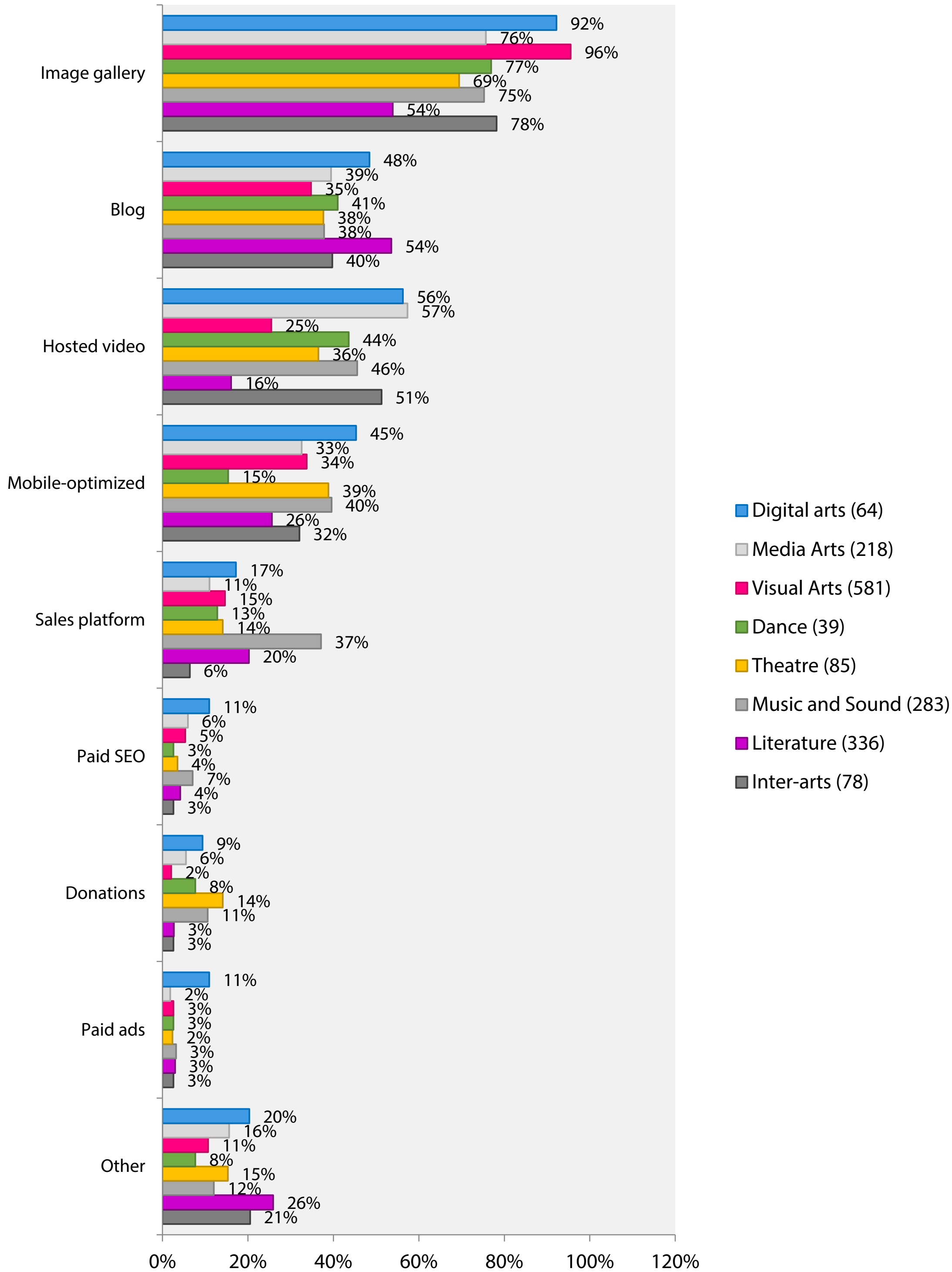
Figure 91: Website features (artists)



n=1,698
source: Nordicity Arts in a Digital World survey (2016)

Some features are more prevalent among artists working in different disciplines. The figure below breaks out the preceding information by artistic discipline.

Figure 92: Website features, by discipline (artists)

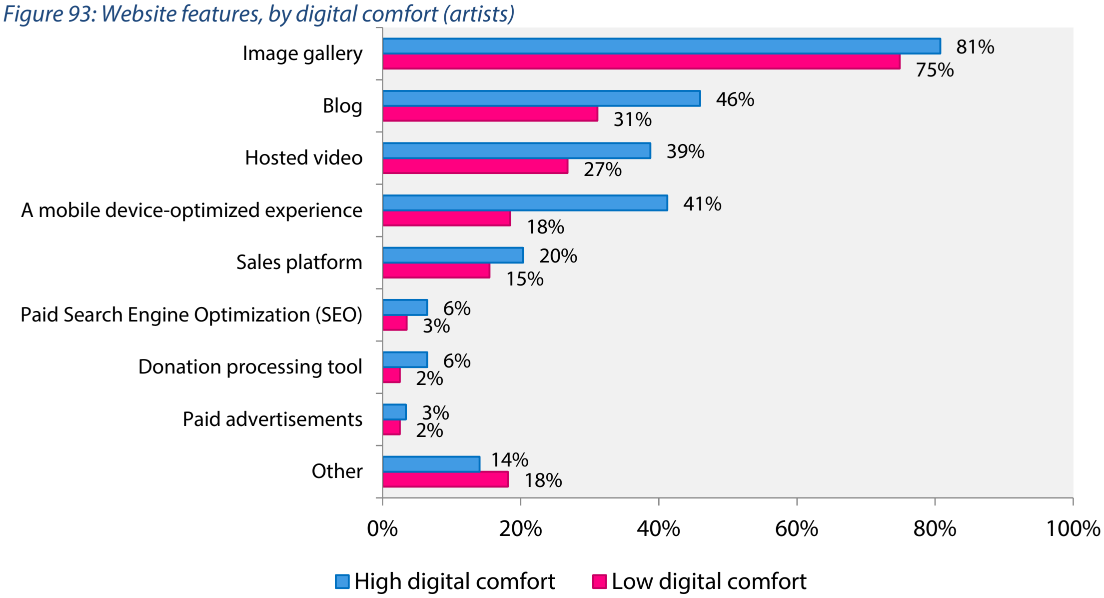


n=1,698
source: Nordicity Arts in a Digital World survey (2016)

This chart presents a more granular view of the tendency to have certain features in each discipline's web sites. For example, visual arts and digital arts are the most likely to feature an image gallery, while literature practitioners (i.e. authors) are more likely to host a blog. Likewise, digital and media artists are the most likely to host video, and digital artists are more likely to have a mobile device-optimized website with paid search engine optimization (SEO) and paid advertisements. Musicians are the most likely to have a sales platform on their website (by a large margin), while theatre artists are most likely to seek donations.

The following figure analyses website features by artists' level of digital comfort. While the group with low digital comfort generally reports fewer features than that with high digital comfort, the difference is less pronounced with respect to the presence of an image gallery and sales platform.

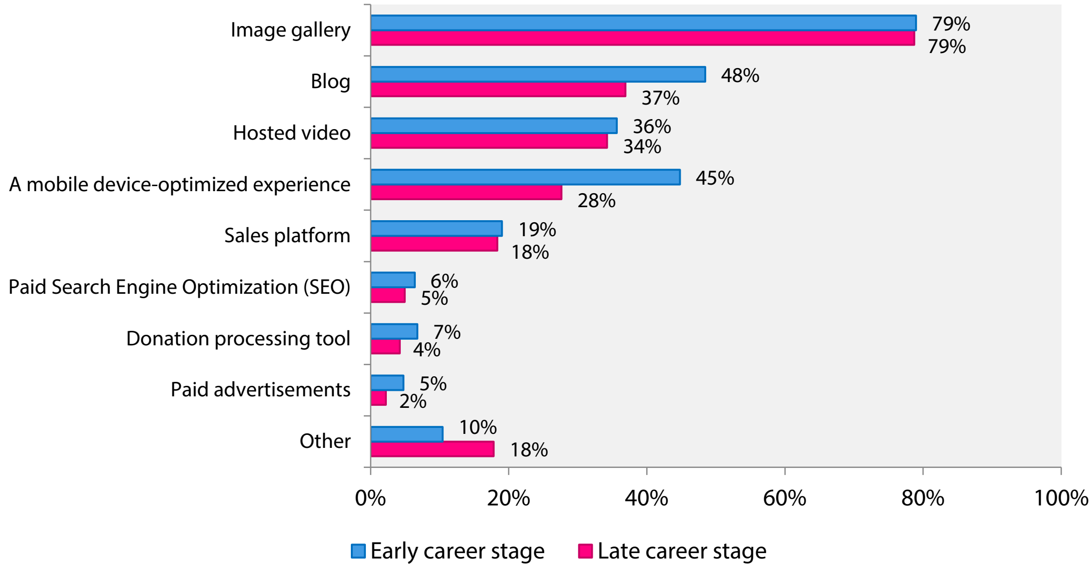
Figure 93: Website features, by digital comfort (artists)



n=1,697
source: Nordicity Arts in a Digital World survey (2016)

The following figure breaks out website features by artists' career stage. While responses are largely similar, early career stage artists are considerably more likely to have a blog and cater to a mobile device-optimized experience.

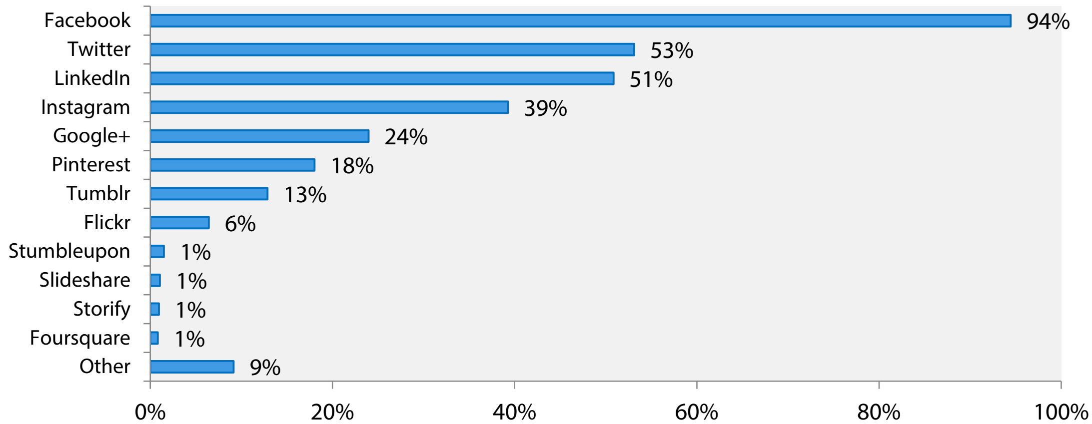
Figure 94: Website features, by career stage (artists)



n=1,680
source: Nordicity Arts in a Digital World survey (2016)

Apart from website features, the following chart shows that the dominant social media platforms for artists are Facebook, Twitter, and LinkedIn, although Facebook leads by a substantial margin.

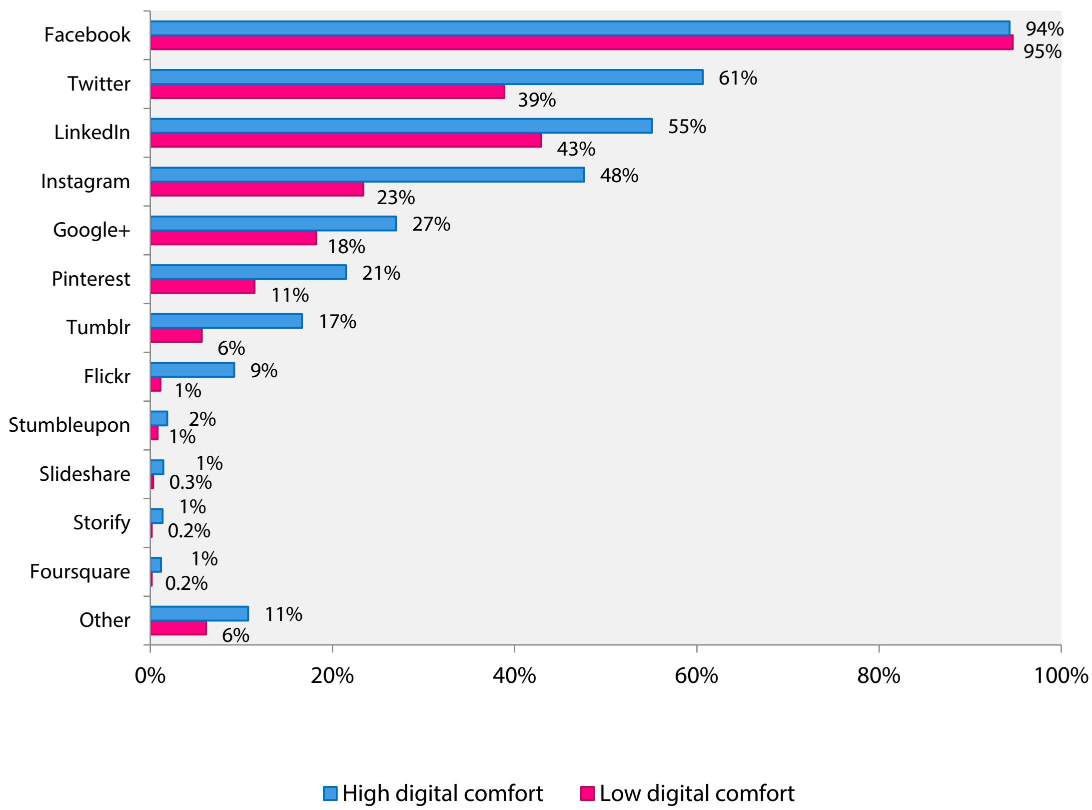
Figure 95: Social media platforms used (artists)



n=1,803
source: Nordicity Arts in a Digital World survey (2016)

The following figure breaks out the preceding information by digital comfort, showing that the use of Facebook is slightly higher among artists with a low level of digital comfort. The low digital comfort group also exhibits markedly lower usage of Twitter, Instagram, Pinterest, Tumblr and Flickr. This continues the theme whereby artists with a low level of digital comfort tend to exhibit much lower adoption rates for platforms that are less used overall.

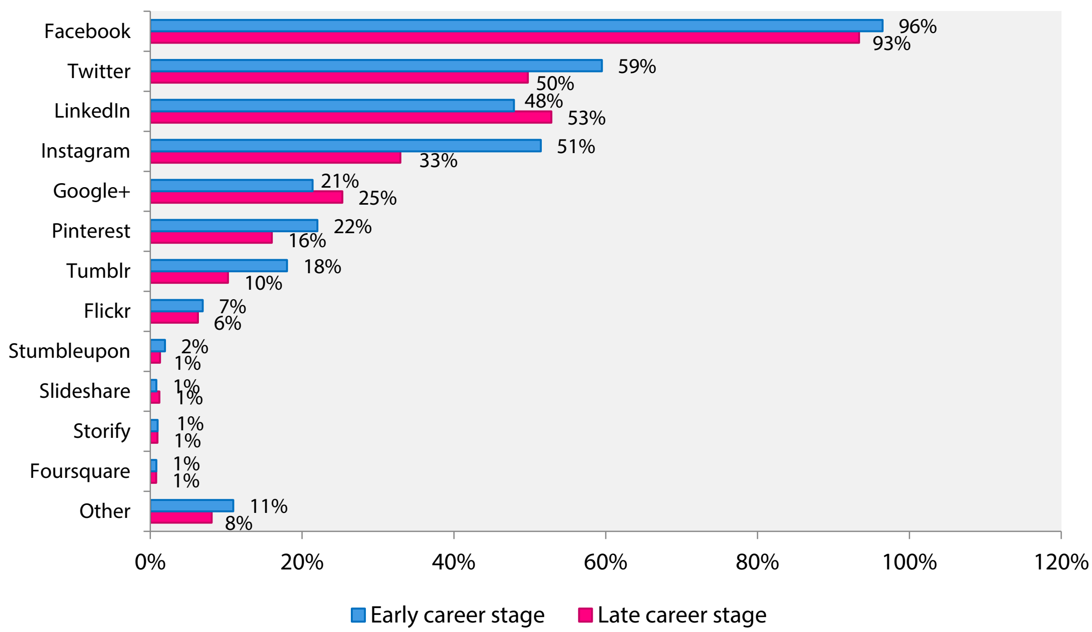
Figure 96: Social media platforms used, by digital comfort (artists)



n=1,802
source: Nordicity Arts in a Digital World survey (2016)

Although the disparity is less pronounced for artists in a later stage of their careers, this group is also less likely to use Twitter and Instagram. In contrast, these artists are more likely to use LinkedIn and Google+ than less established artists. This group's use of LinkedIn could suggest that they have more professional experience to share compared to artists at an earlier stage of their careers.

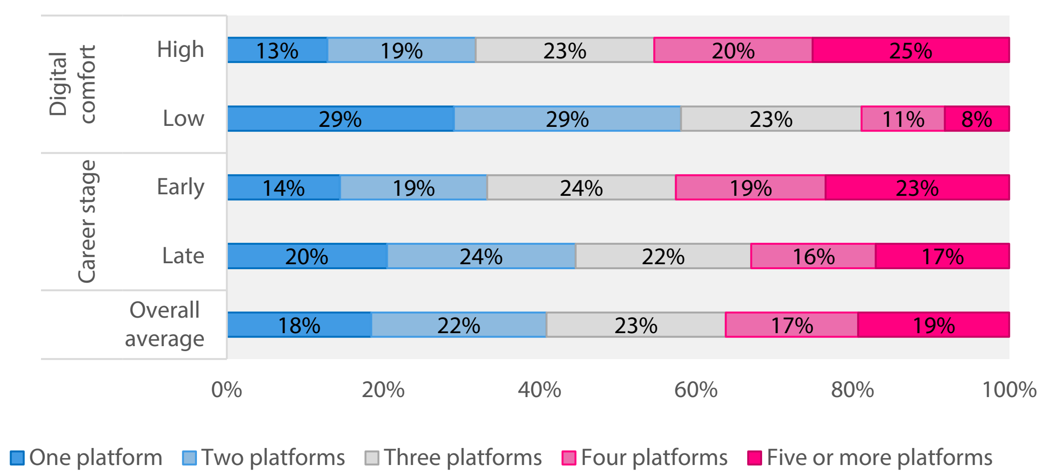
Figure 97: Social media platforms used, by career stage (artists)



n=1,784
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows the number of social media platforms on which artists are active. Artists with a low level of digital comfort are significantly less likely to use multiple social media platforms.

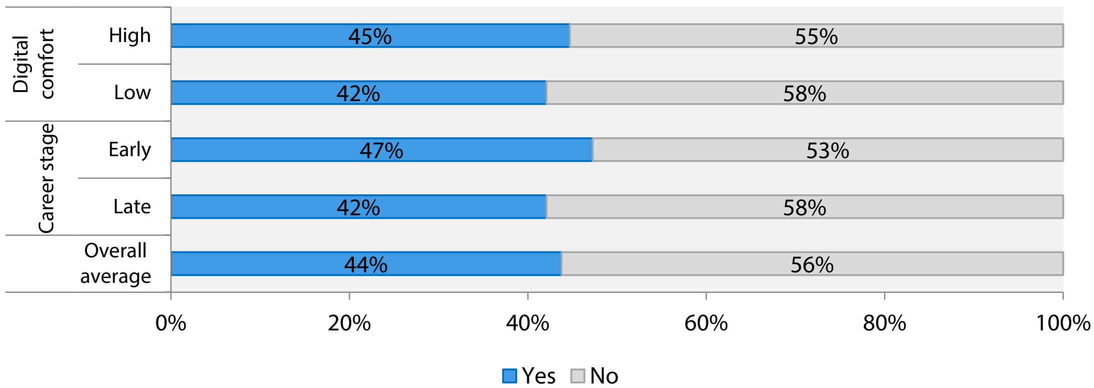
Figure 98: Number of social media platforms used, by digital comfort and career stage (artists)



n=1,803
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that fewer than half of artists (44%) maintain a separate social media account for their artistic work.

Figure 99: Maintenance of a separate social media account for artistic work, by digital comfort and career stage (artists)



n=1,805
source: Nordicity Arts in a Digital World survey (2016)

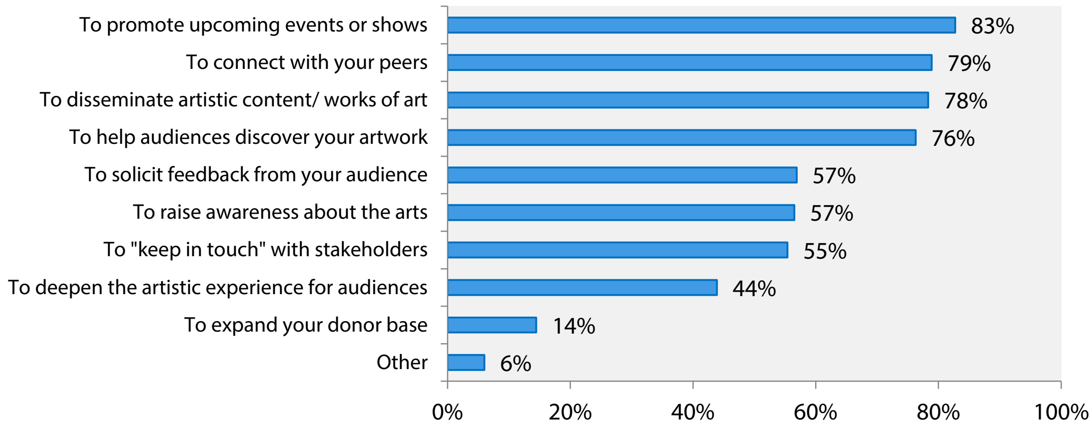
While there is a small difference between high and low digital comfort groups, there is a greater discrepancy between artists at different career stages. In this case, established artists are more likely to use their personal social media account for their artistic work.

Consistent with the fact that most artists do not distinguish between personal and professional social media accounts, is the fact that the vast majority of artists maintain their own social media accounts. Only a very small minority (9%) contract this work to a third-party service provider and there is little variation by level of digital comfort or career stage.

The figure below shows two distinct tiers of purposes that artists attribute to their social media presence. The first tier (cited by 76% to 83% of artists) positions social media as a communications tool to reach audiences – that is, organizing shows, connecting with peers, and disseminating artistic content, as well as helping audiences discover artistic work.

The second tier focuses on broader social themes (cited by 44% to 57% of artists) with a reciprocal communicative intent – that is, to obtain feedback from audiences, keep in touch with stakeholders, and raise awareness about the arts. A very low proportion of artists (14%) view social media as a way to increase their donor base, in contrast to the other purposes cited.

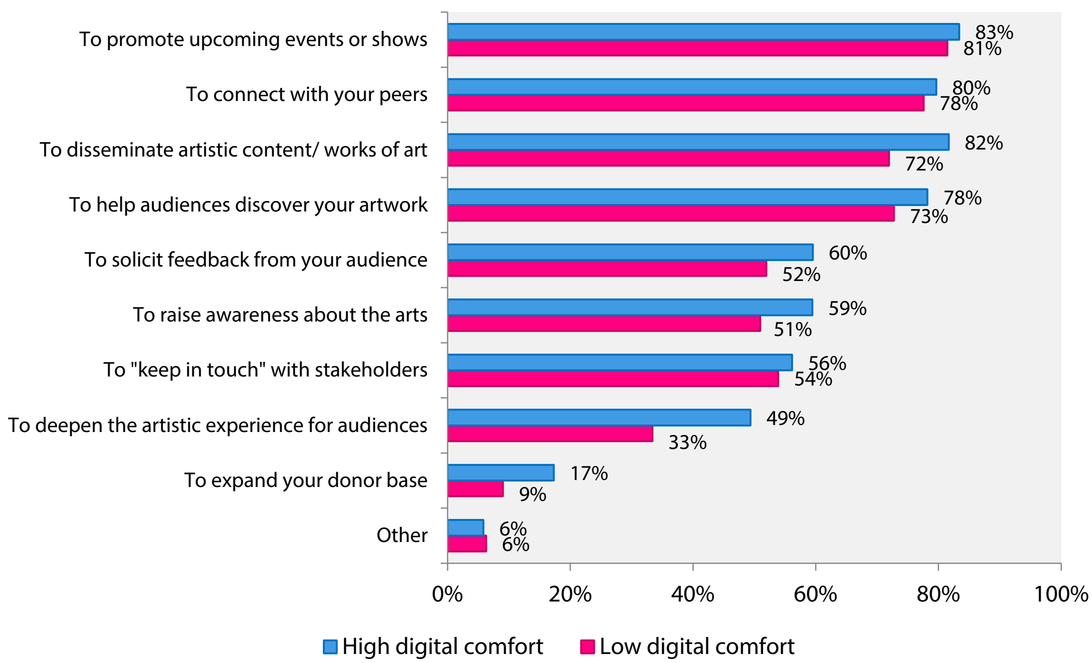
Figure 100: Purposes of social media presence (artists)



n=1,800
source: Nordicity Arts in a Digital World survey (2016)

As the following chart shows, artists with greater digital comfort differ most significantly from their less digitally comfortable counterparts in their perception of social media as a medium through which to deepen the artistic experience for audiences.

Figure 101: Purposes of social media presence, by digital comfort (artists)

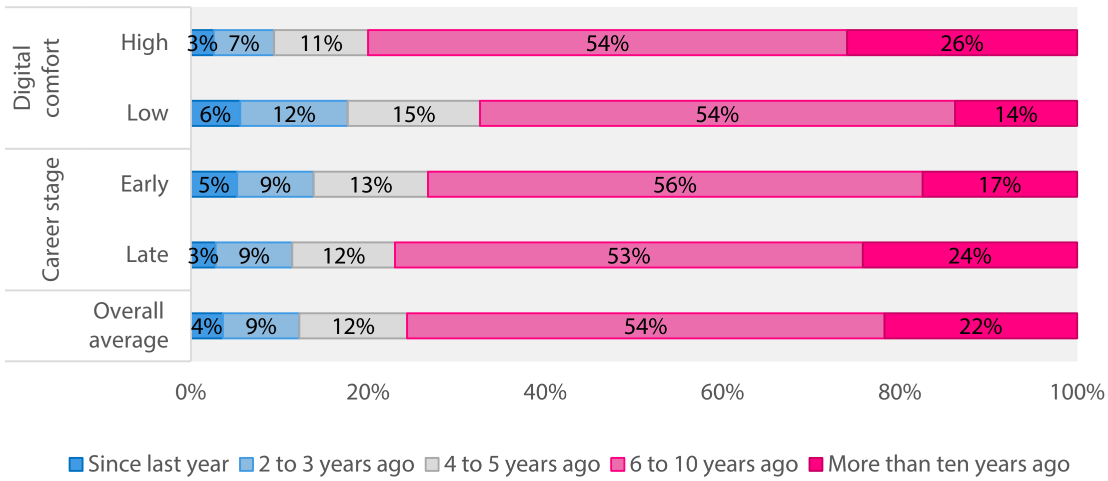


n=1,799
source: Nordicity Arts in a Digital World survey (2016)

Although there is a minor difference by career stage, artists in the later stage of their careers are somewhat more likely to emphasize the social functions of their websites especially keeping in touch with stakeholders, as illustrated in the following figure.

The chart below shows that almost over three quarters of artists (76%) have been active on social media for over five years.

Figure 102: Duration of activity on social media, by digital comfort and career stage (artists)



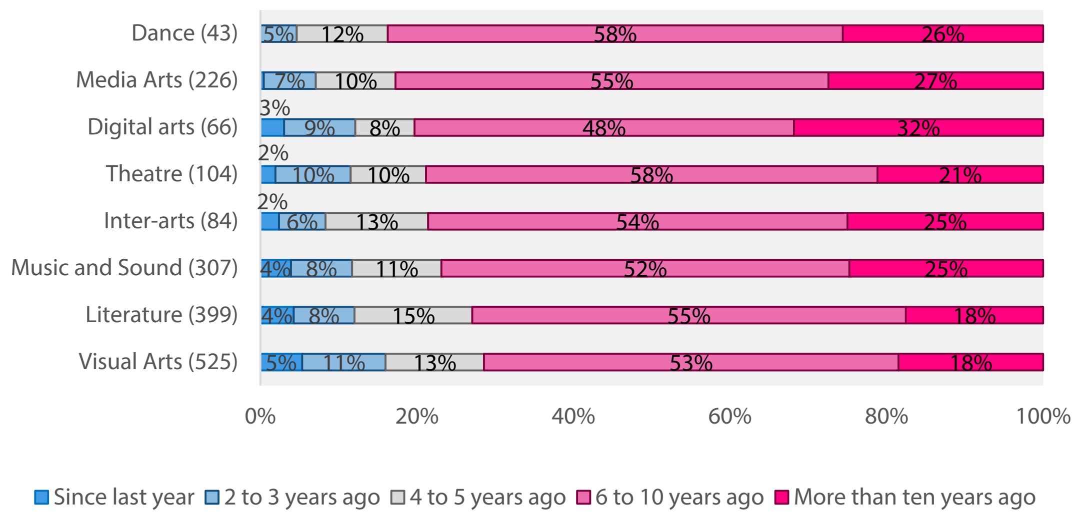
n=1,771
source: Nordicity Arts in a Digital World survey (2016)

In contrast to the generally slower adoption of digital tools among artists in the late stage of their careers, this group led their less established counterparts in their adoption of social media. Like website sales platforms, this may be due to late stage artists being farther along on their adoption curve – that is, artists that are ten (or more) years into their career will have had longer to establish a presence, even if they are slow adopters relative to their peers.

Breaking this data down by discipline, the following chart shows that social media adoption occurred earlier among practitioners of digital arts, media arts and dance. Excepting dance, these disciplines heavily rely on digital technologies, so the advanced technological savvy among practitioners of these disciplines is consistent with their creative activities.

The leading position of digital arts and media arts in social media also echoes their prominence in the discussion of sales and dissemination. Outside of disciplinary differences, the most frequent users of social media are artists with a high level of digital comfort and those in the early stage of their career. On average, artists also post to social media at least weekly across all groups.

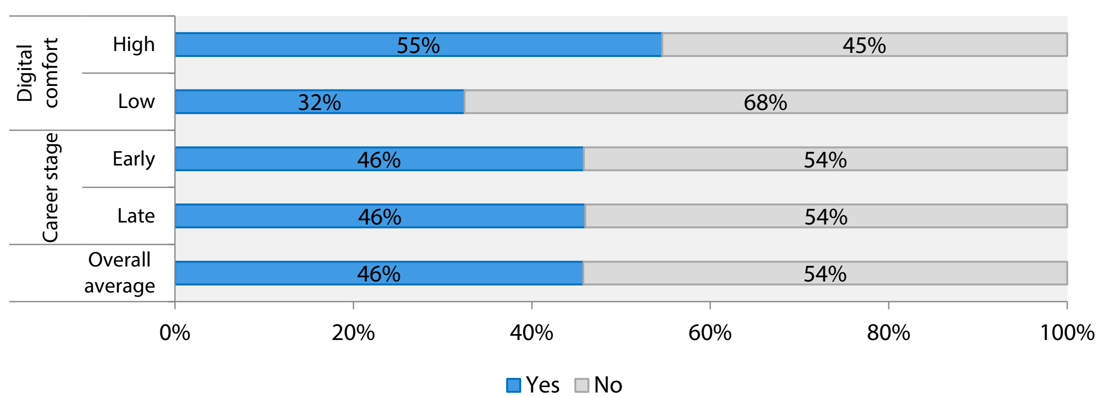
Figure 103: Duration of activity on social media, by discipline (artists)



n=1,766
source: Nordicity Arts in a Digital World survey (2016)

Aside from social media, 46% of artists reported using videos as a communications tool, as illustrated in the chart below.

Figure 104: Use of videos as a communications tool, by digital comfort and career stage (artists)

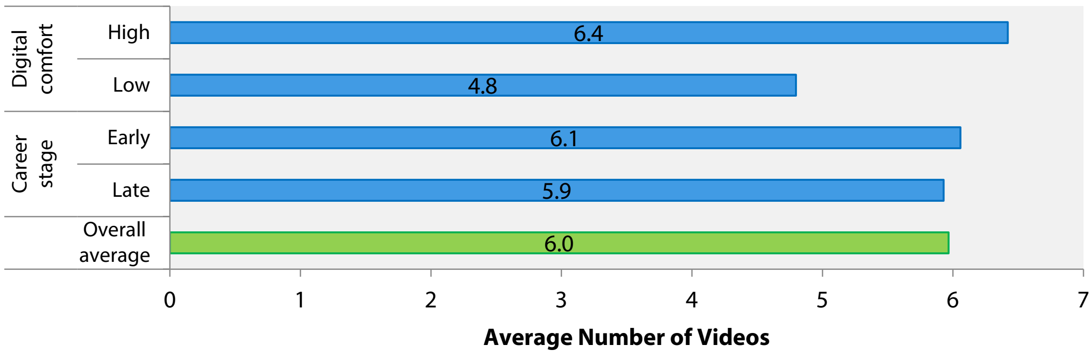


n=2,272
source: Nordicity Arts in a Digital World survey (2016)

There was no significant difference between artists in the early and late stages of their careers, which stands in stark contrast to that between those with low and high levels of digital comfort.

Of the artists that use videos as a communication tool, almost two thirds (65%) uploaded from one to five videos in the last year. In contrast, only 13% of these artists uploaded over 10 videos in that period. The following chart shows that these artists uploaded an average of six videos in the last 12 months. This figure was slightly lower for artists with low digital comfort.

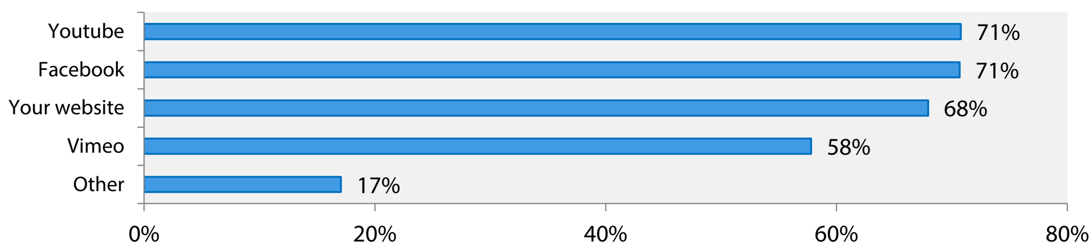
Figure 105: Average number of videos uploaded in the last 12 months, by digital comfort and career stage (artists)



n=1,001
source: Nordicity Arts in a Digital World survey (2016)

The figure below shows the platforms on which artists reported posting their videos.

Figure 106: Video platforms used (artists)

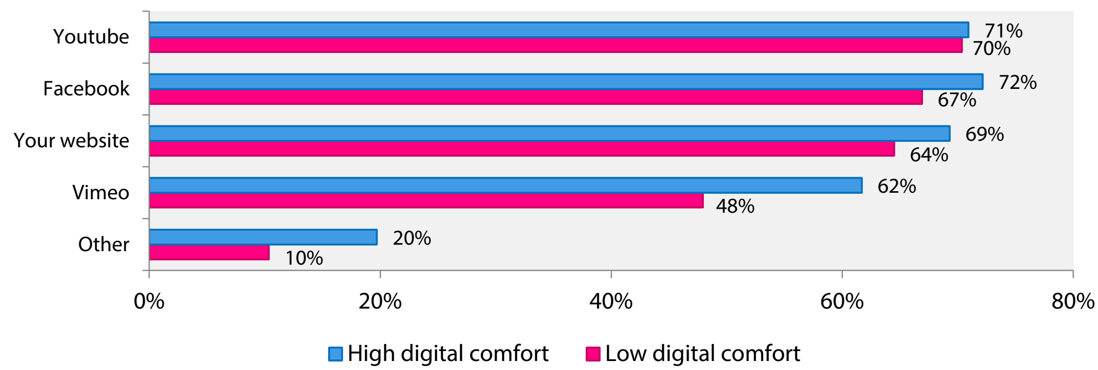


n=1,026
source: Nordicity Arts in a Digital World survey (2016)

The prevalence of YouTube and Facebook for video sharing confirms the importance of social media as discussed in Thematic Report 2. When broken out by career stage, artists at an earlier stage in their careers are more likely to post video on Facebook. Conversely, the fact that established artists are more likely to use their own websites reinforces previous observations that artists at a later career stage tend to have more active proprietary websites with greater functionality.

As the following chart shows, artists with a low level of digital comfort use YouTube at about the same rate as their more digitally comfortable counterparts. With respect to the lower ranked video platforms, a familiar pattern emerges among artists with low digital comfort whereby these artists exhibit a much lower likelihood of using the platforms with lower overall usage.

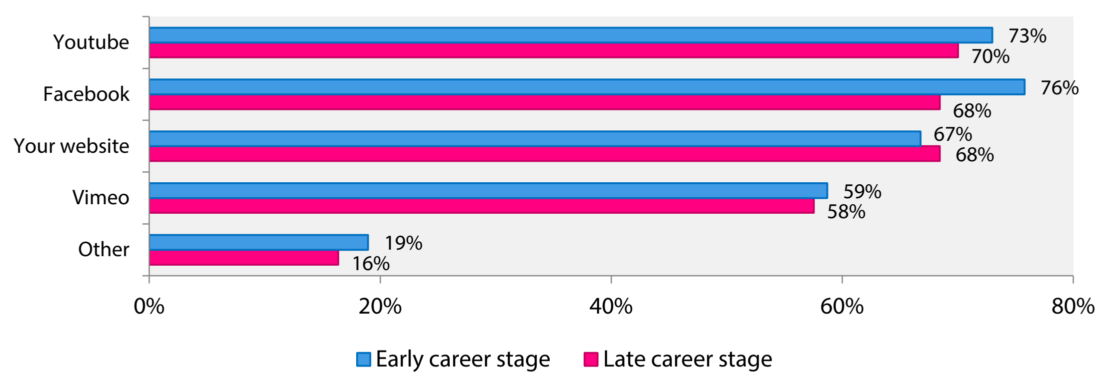
Figure 107: Video platforms used, by digital comfort (artists)



n=1,026
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that artists in the later stage of their career are slightly more likely to host video on their own website. For all other platforms, early career stage artists exhibit higher usage rates.

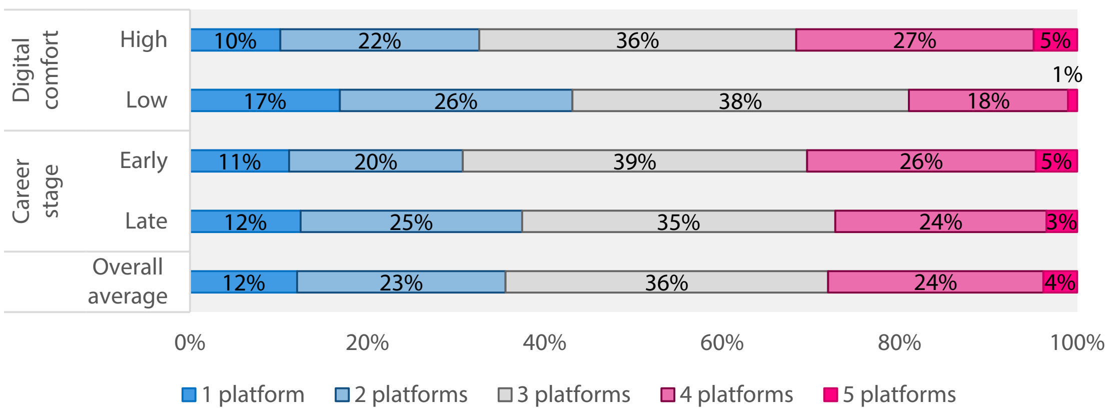
Figure 108: Video platforms used, by career stage (artists)



n=1,026
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows that of the artists who use videos as a communication tool, artists with a high level of digital comfort are the most likely to share their work on a greater number of platforms.

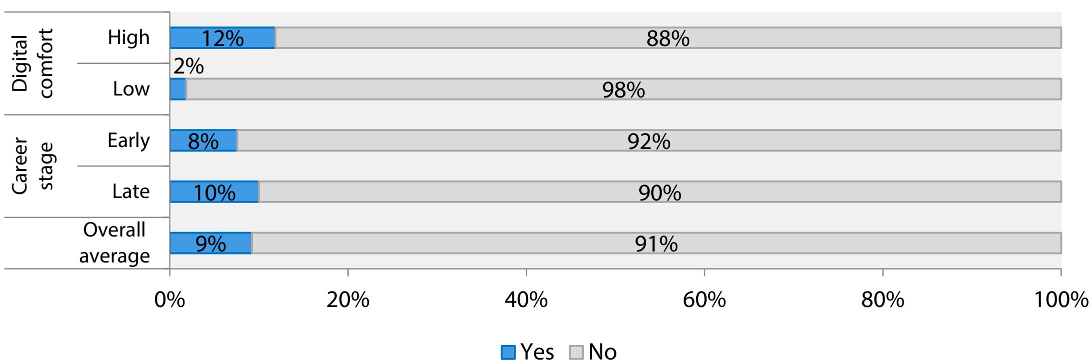
Figure 109: Number of video platforms used, by digital comfort and career stage (artists)



n=1,026
source: Nordicity Arts in a Digital World survey (2016)

As the figure below illustrates, about one in eleven artists (9%) has created an app. This drops to about one in fifty (2%) among artists with a low level of digital comfort. In effect, the vast majority of artists, regardless of digital comfort or career stage has not created an app.

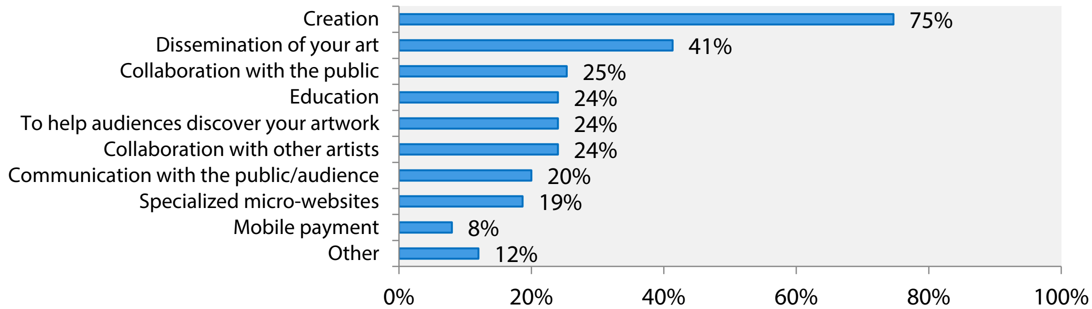
Figure 110: Creation of apps, by digital comfort and career stage (artists)



n=1,787
source: Nordicity Arts in a Digital World survey (2016)

As illustrated in the figure below, of the artists that created apps, the most highly cited reason for doing so was as a form of creation. As such, it is clear that 75% artists who venture into app creation see this activity as an artistic medium in its own right.

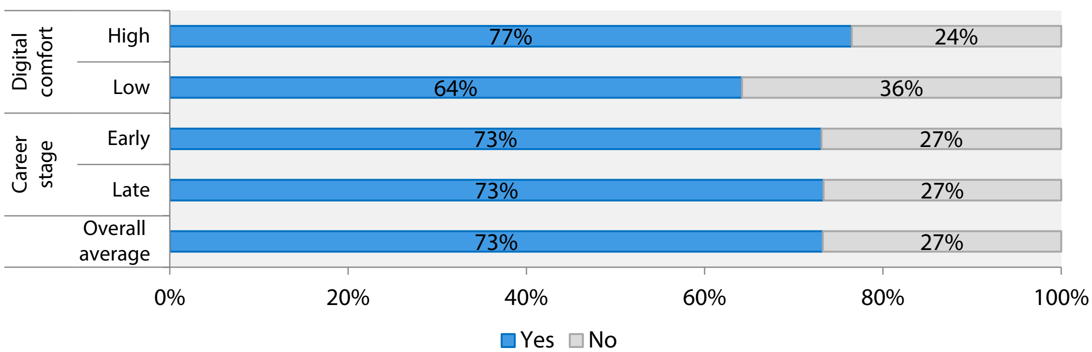
Figure 111: Purposes of apps (artists)



n=56
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows that most artists who use apps (73%) use apps created by others. While this is constant regardless of career stage, artists with a low level of digital comfort are less likely to do so.

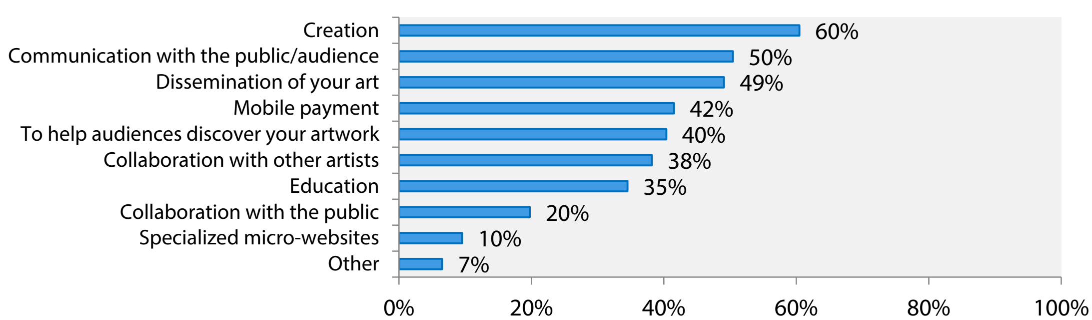
Figure 112: Use of apps created by others, by digital comfort and career stage (artists)



n=815
source: Nordicity Arts in a Digital World survey (2016)

As the following figure illustrates, creation was also a significant motivator for artists that used apps created by others, although artists' stated purposes otherwise tend to emphasize similar themes as those associated with their websites (i.e. audience engagement, dissemination).

Figure 113: Purposes of apps created by others (artists)

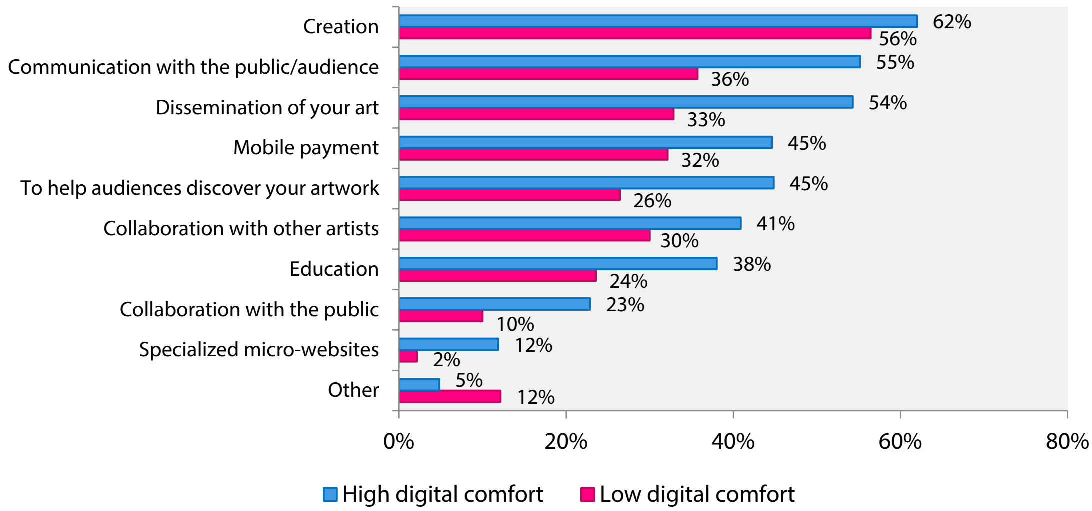


n=595
source: Nordicity Arts in a Digital World survey (2016)

Creation was a more significant motivation for artists with low digital comfort. Indeed, artists with a low level of digital comfort have a very similar response profile with respect to apps created by others as artists with a high level of digital comfort have with respect to self-created apps.

Artists with a high level of digital comfort, on the other hand, seem to view apps created by others as parallel to broader perceptions of a website's function (emphasizing purposes such as discovery, dissemination and communications). Findings for artists at different stages of their careers parallel those described with respect to artists with different levels of digital comfort, again, with a less pronounced effect.

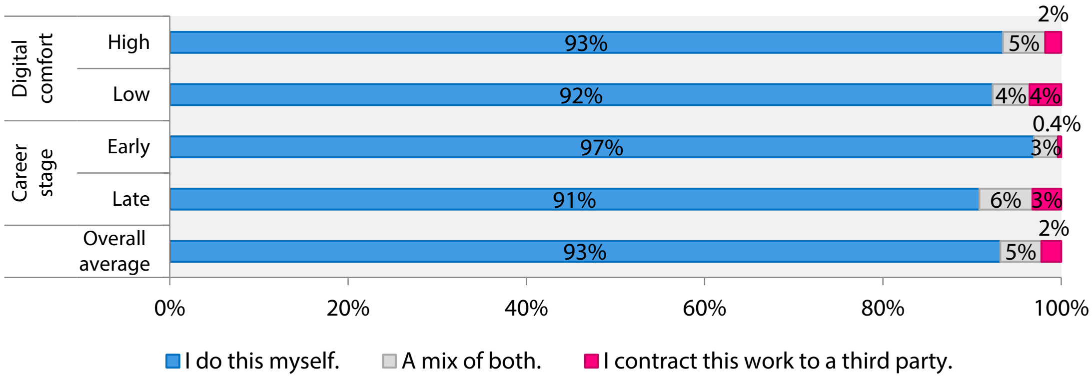
Figure 114: Purposes of apps created by others, by digital comfort (artists)



n=595
source: Nordicity Arts in a Digital World survey (2016)

The chart below shows that artists generally maintain their own blogs, with very few electing to contract this work to a third party.

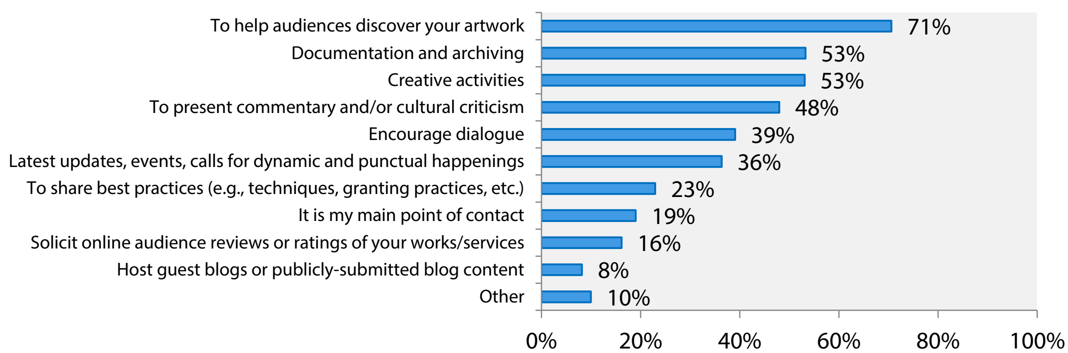
Figure 115: Maintenance of blog, by digital comfort and career stage (artists)



n=673
source: Nordicity Arts in a Digital World survey (2016)

As the following figure illustrates, the primary reason that artists maintain a blog is to promote their work. However, the subsequent reasons listed are less career-focused than many of the other forms of digital media that artists employ.

Figure 116: Purposes of blog (artists)

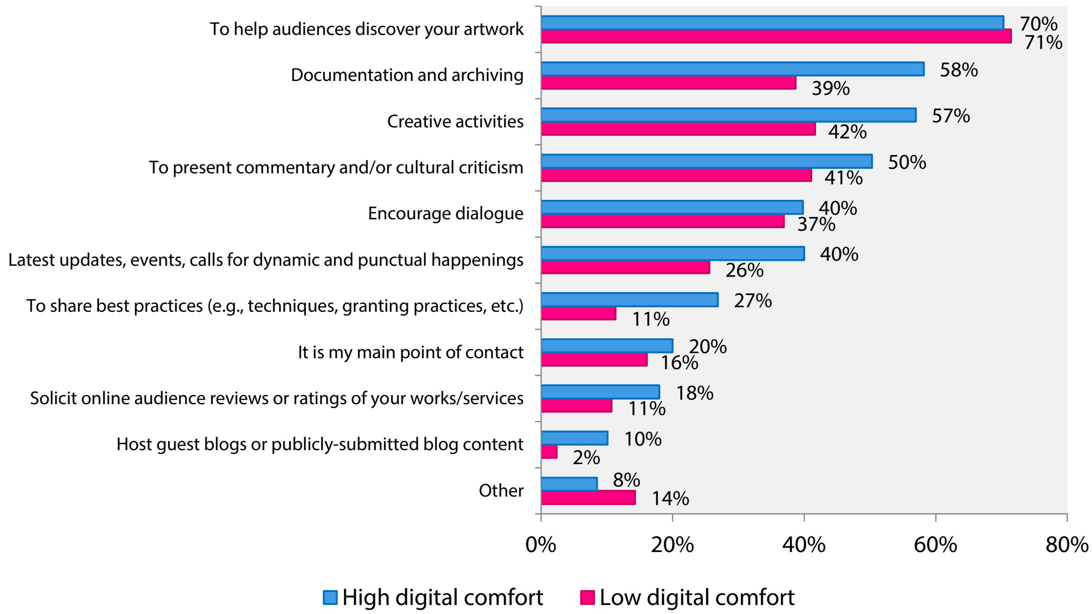


n=663
source: Nordicity Arts in a Digital World survey (2016)

The second and third most important purposes are documentation and archiving, and creative activities. This finding suggests that artists view blogs as a medium through which to curate and discuss their work, and even as a creative medium that extends upon it. The next most frequent responses relate to commentary, cultural criticism and dialogue. As such, it appears that the tertiary function of a blog is to facilitate reflection within an individual artistic practice and across disciplines more broadly.

The figure below breaks out this information by artists' level of digital comfort. Artists with low digital comfort are slightly more likely than artists with a high level of digital comfort to view blogs as a medium for promoting their work. Artists in a later stage of their careers are also more likely to view blogs as a promotional medium, however, these artists are also more likely to use blogs to present commentary or cultural criticism.

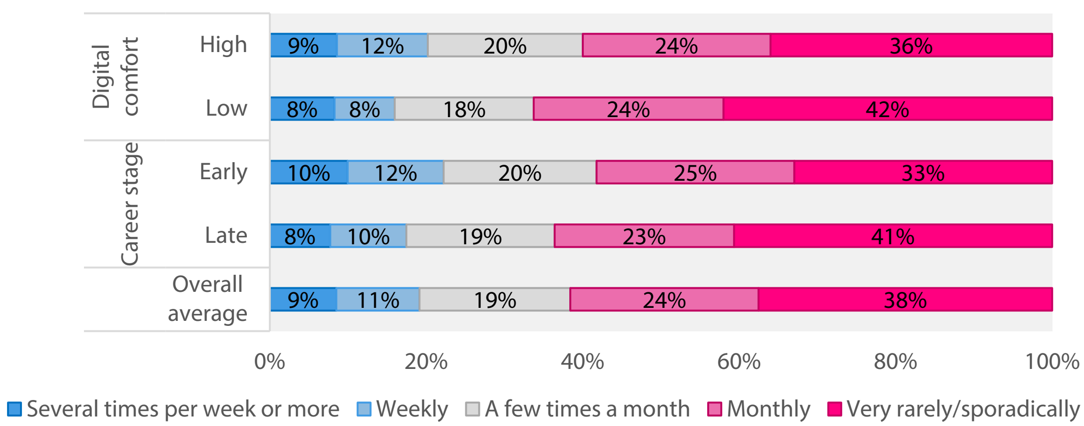
Figure 117: Purposes of blog, by digital comfort (artists)



n=663
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows that about four in ten artists (38%) update their blog a few times a month or more frequently. In this case, there is little significant variation between artists at different stages of their careers or with different levels of digital comfort, although there is a tendency for artists with a lower level of digital comfort and those later in their careers to update slightly less frequently than their counterparts.

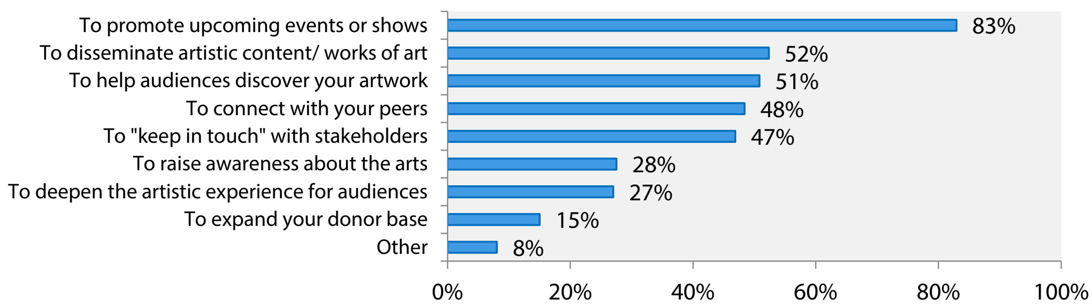
Figure 118: Frequency of blog updates, by digital comfort and career stage (artists)



n=669
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that the most prevalent purpose of email newsletters is to promote upcoming events and shows. More than half of artists that use email newsletters also cited dissemination and discoverability as motivating factors behind this form of online engagement.

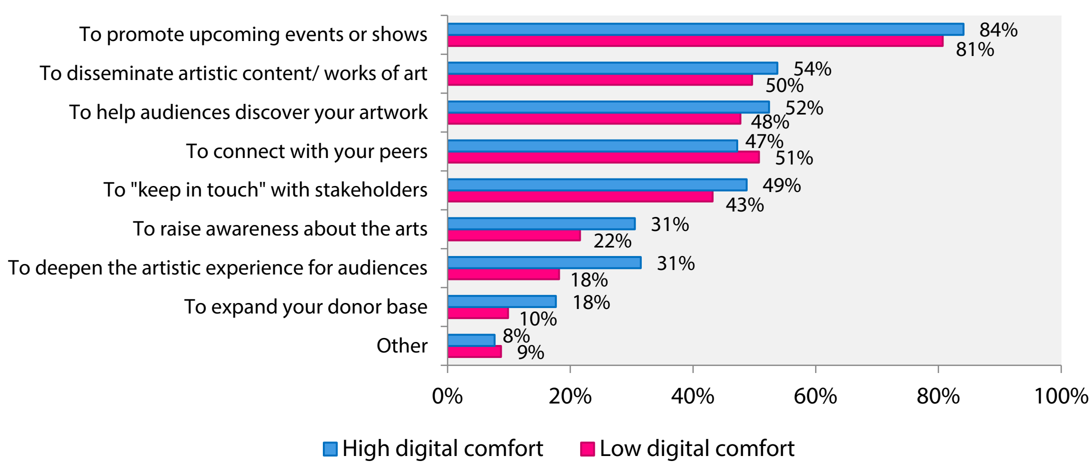
Figure 119: Purposes of email newsletters (artists)



n=785
source: Nordicity Arts in a Digital World survey (2016)

As illustrated in the following chart, artists with a low level of digital comfort tend to have similar objectives as those with a high level of digital comfort, however, they are slightly more likely to view email newsletters as a means to connect with their peers. This association may exist because these individuals tend to use email for social purposes that might be fulfilled by social media for artists with a higher level of digital comfort.

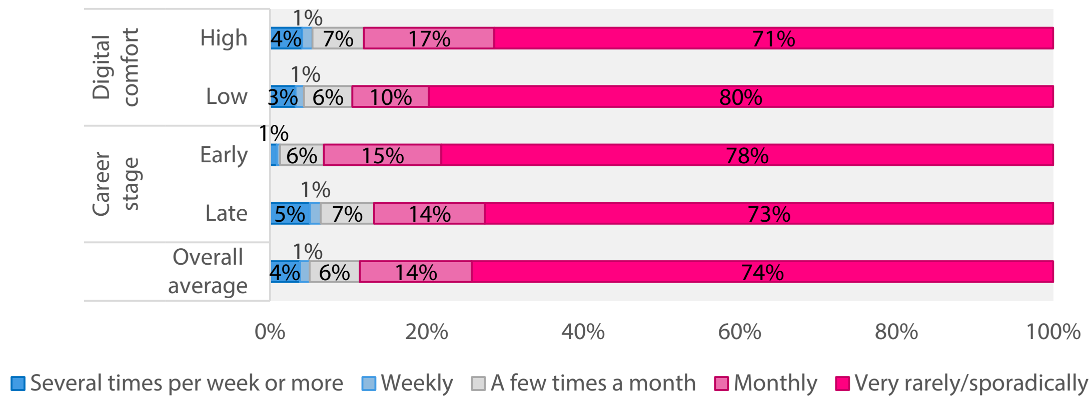
Figure 120: Purposes of email newsletters, by digital comfort (artists)



n=785
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows that only about a quarter of artists (26%) send newsletters on a monthly or more regular basis. Even among the most digitally comfortable artists, only 29% do so.

Figure 121: Frequency of email newsletters, by digital comfort and career stage (artists)



n=811
source: Nordicity Arts in a Digital World survey (2016)

2.4 Fundraising and Management

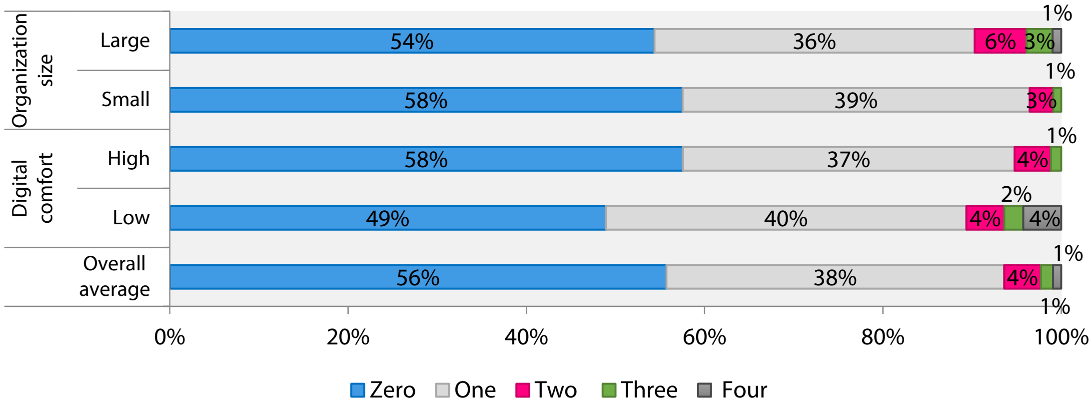
Key Findings

- 44% of organizations and 43% of artists conducted at least one crowdfunding campaign in the last year.
- A significant portion of organizations (25%) and artists (12%) do not list money as their primary reason for crowdfunding. These findings emphasize the importance of this activity for increasing awareness of artistic projects.
- Among organizations, the most common uses of digital management tools are for: accounting, project management and collaboration; and, data management.
- Only 16% of arts organizations reported coinvesting in digital management tools.
- The most common services that organizations offer are: education, professional development and distribution/publishing. Large organizations offer on average more services, as do those that have a higher level of digital comfort.

Digital tools also contribute to both fundraising and management for organizations. Crowdfunding is used by both organizations and artists to support specific projects although in some cases it has also been harnessed for operational funding. In terms of management, digital technology can assist with professional development, coordinating client accounts and organizational contacts as well as day-to-day office activities.

As the figure below illustrates, organizations that conducted crowdfunding campaigns did so at comparable frequency across all comparison groups. It is worth that the majority (56%) of organizations conducted zero crowdfunding campaigns over the past year.

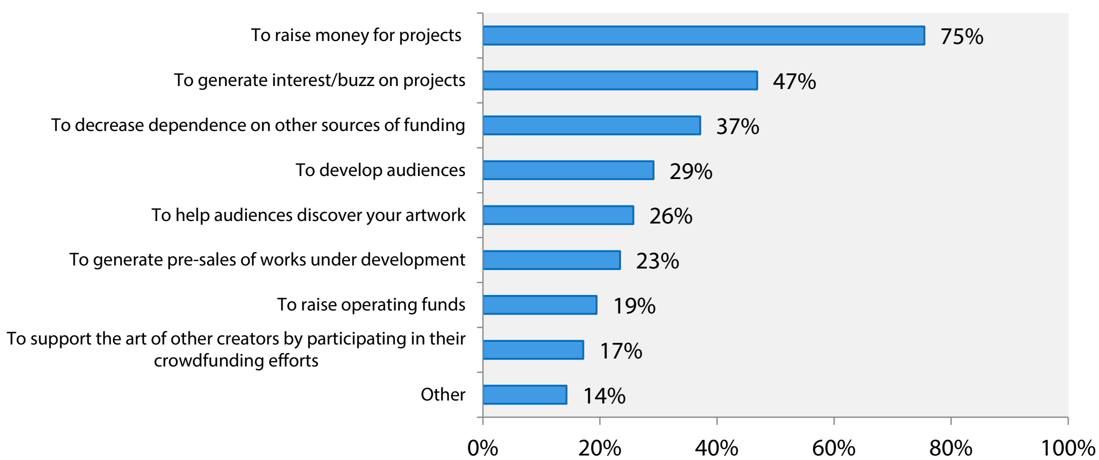
Figure 122: Number of crowdfunding campaigns, by digital comfort and organization size (arts organizations)



n=219
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that only about three quarters of organizations reported conducting crowdfunding campaigns to raise money for projects, while 37% did so to decrease their dependence on other sources of funding. This finding highlights the perspective that crowdfunding is a platform from which organizations (and artists) can realize many different benefits. The leading non-financial purposes cited by organizations was to generate interest/buzz about projects, to develop audiences and to help audiences discover their artwork.

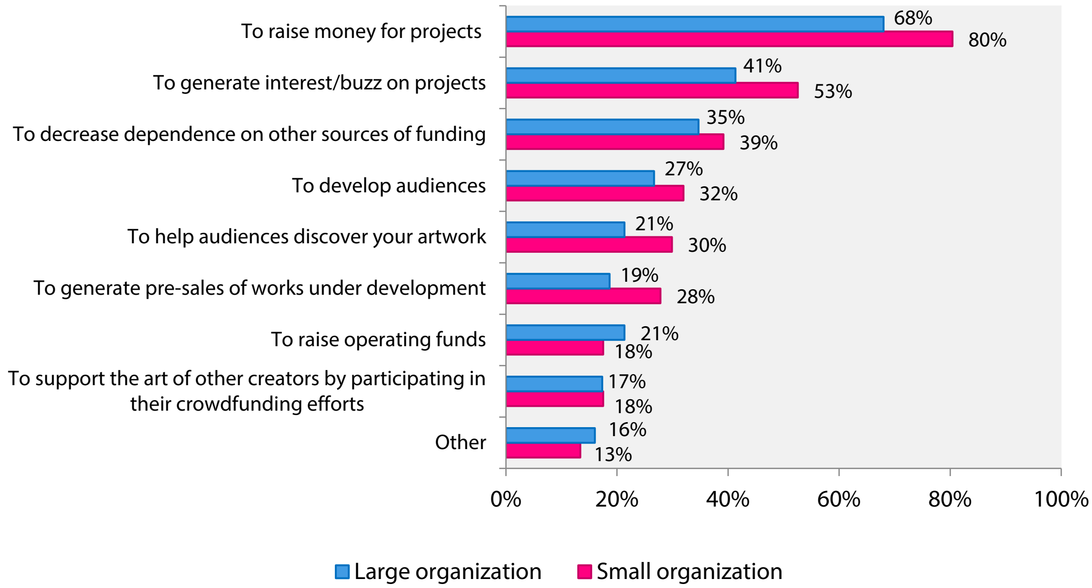
Figure 123: Purposes of crowdfunding (arts organizations)



n=175
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that nearly all motivations for crowdfunding are more common among small organizations. This finding suggests that smaller organizations view crowdfunding as a tool that can be leveraged for a wider variety of purposes than their larger counterparts.

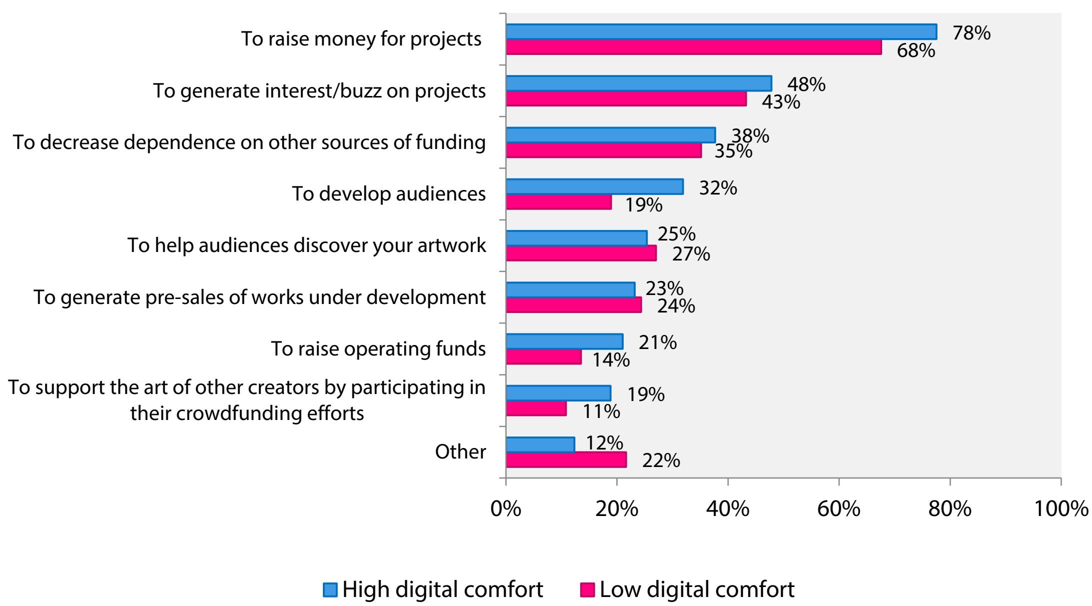
Figure 124: Purposes of crowdfunding, by organization size (arts organizations)



n=137
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that organizations with a high level of digital comfort are considerably more likely to view crowdfunding to develop audiences than their less digitally comfortable counterparts.

Figure 125: Purposes of crowdfunding, by digital comfort (arts organizations)

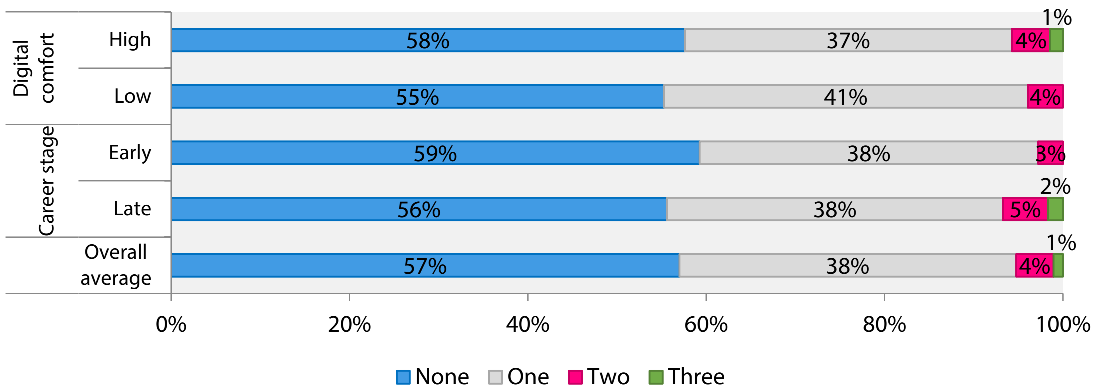


n=175
source: Nordicity Arts in a Digital World survey (2016)

As the figure below illustrates, organizations that conducted crowdfunding campaigns did so at comparable frequency across all comparison groups. It is worth that the majority (56%) of organizations conducted zero crowdfunding campaigns over the past year.

The survey also asked artists about their use of crowdfunding. The following figure shows that 43% of artists who use crowdfunding have conducted at least one crowdfunding campaign in the past year. Very few artists (5%) conducted more than two campaigns in the past year.

Figure 126: Number of crowdfunded campaigns in past year, by digital comfort and career stage (artists)

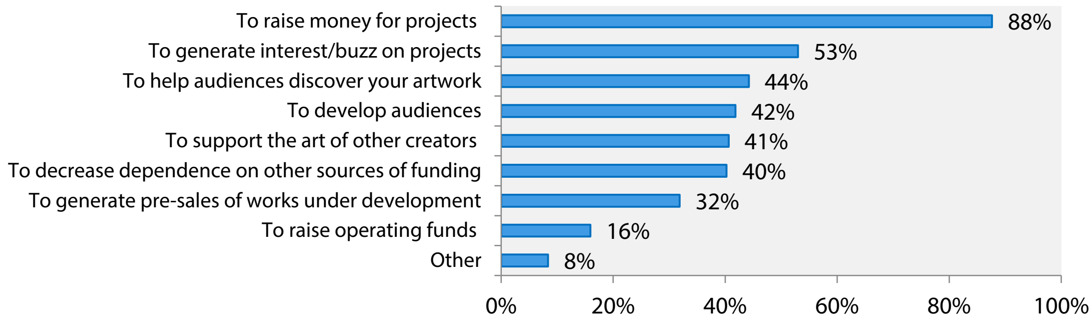


n=286
source: Nordicity Arts in a Digital World survey (2016)

Only 88% of artists reported that raising money for a project was a motivation for conducting a crowdfunding campaign, as illustrated in the following figure. This finding is significant in the sense that 12%, or about one in eight artists that conduct crowdfunding campaigns are not doing it to raise money. The fact that more than half (53%) of artists launched crowdfunding campaigns to generate interest in their projects suggests that publicity is another reason behind this activity.

The responses of artists with different levels of digital comfort were not significantly different. Moreover, artists at a later stage of their career were slightly more likely to cite decreasing dependence on other sources of funding and presales as their motivation for conducting crowdfunding campaigns.

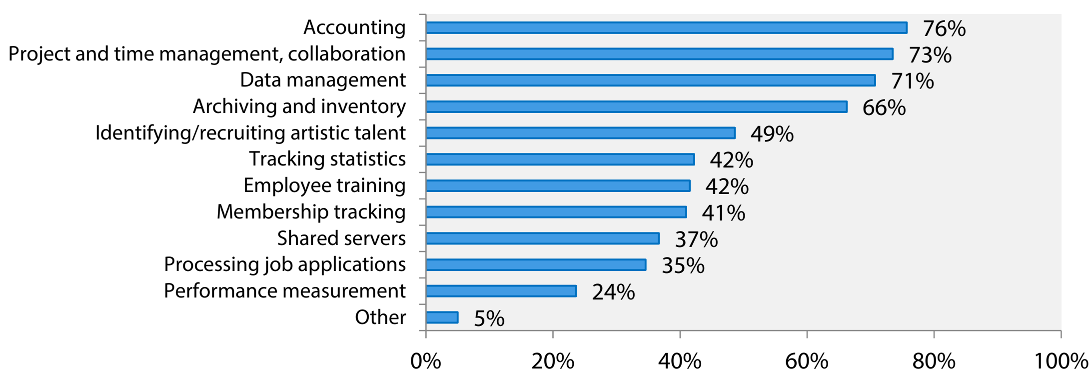
Figure 127: Purposes of crowdfunding campaigns (artists)



n=251
source: Nordicity Arts in a Digital World survey (2016)

In terms of organizational management, the following figure shows that there are two distinct tiers in the categories of software that organizations use. The four most commonly cited software functions (which are used by two thirds to three quarters of organizations) relate to organizational data and process management; specifically, these functions include accounting, project management, data management, and archiving/inventory. The second, lesser-used tier of software functionality (which is used by fewer than half of organizations) tends to emphasize human capital and stakeholder relations; specifically referring to the recruitment of talent, employee training, membership tracking and processing job applications.

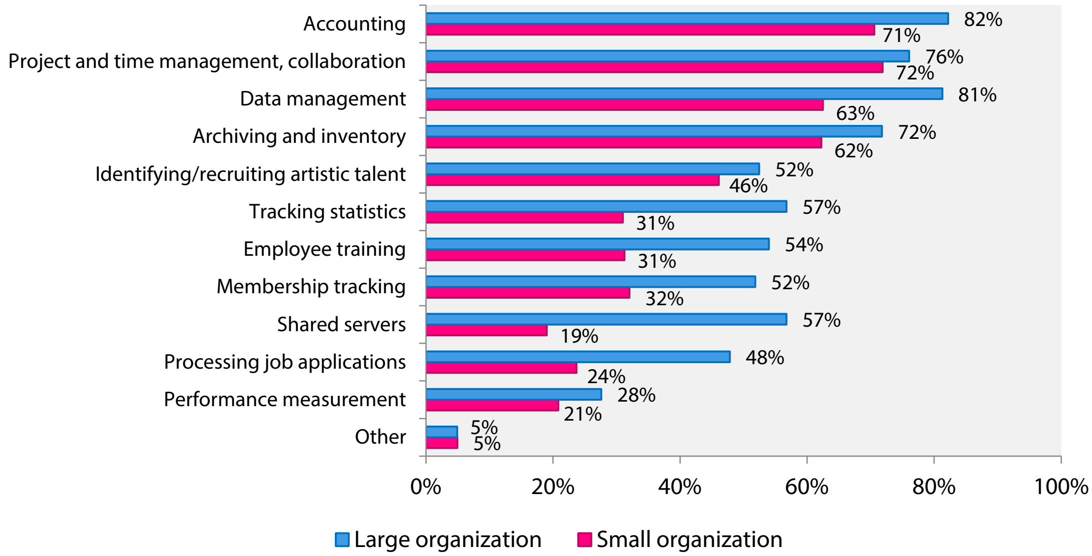
Figure 128: Purposes of digital management tools (arts organizations)



n=720
source: Nordicity Arts in a Digital World survey (2016)

The following chart shows that a similar trend is evident between the use of management tools by small and large organizations. While similar, it is notable that small organizations' use of the human resources and stakeholder engagement-themed second tier of tools is significantly less than their larger counterparts. This finding is not surprising, as smaller organizations are not as likely to operate at a scale that would reap as much benefit from such tools.

Figure 129: Purposes of digital management tools, by organization sizes (arts organizations)

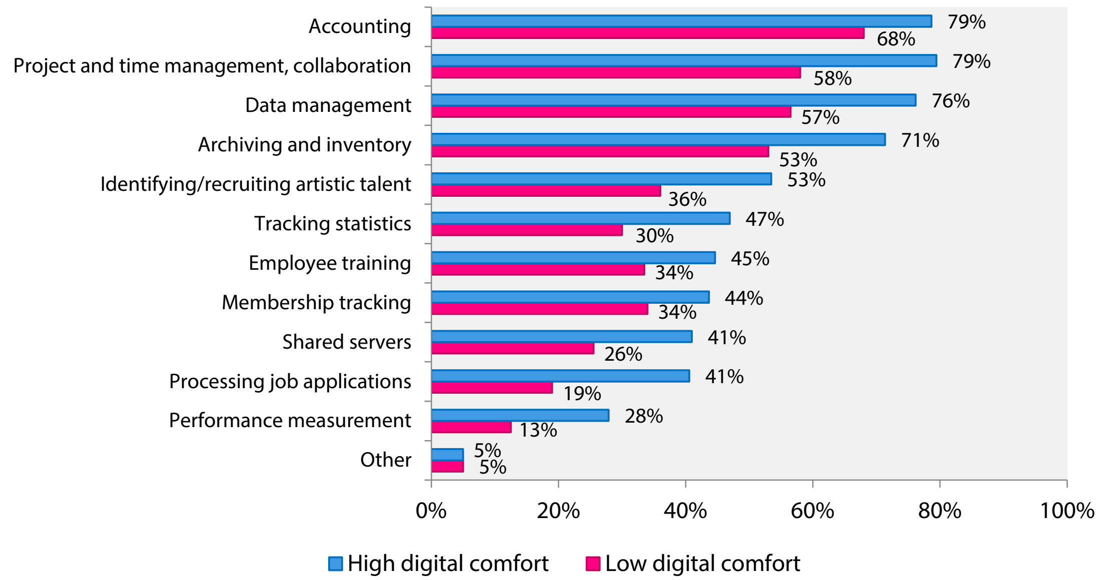


n=720
source: Nordicity Arts in a Digital World survey (2016)

While their responses are similar, large organizations are more likely to use digital management tools across a more comprehensive range of activities. The less prevalent activities overall, which exhibit adoption rates of between 20% to 30% among small organizations tend to cluster around 50% adoption rates among their larger counterparts. The greatest discrepancies are in the use of digital tools for shared services and processing job applications. In these areas, large organizations are approximately two and three times as likely as small organizations to employ technology.

As the following figure shows, this hierarchy of functionality largely holds true for organizations with different levels of digital comfort. Organizations reporting a high level of digital comfort are more likely to use digital management tools than those with low level of digital comfort. While the difference in usage is readily apparent, none of the listed functions stand out as notable exceptions to this observation.

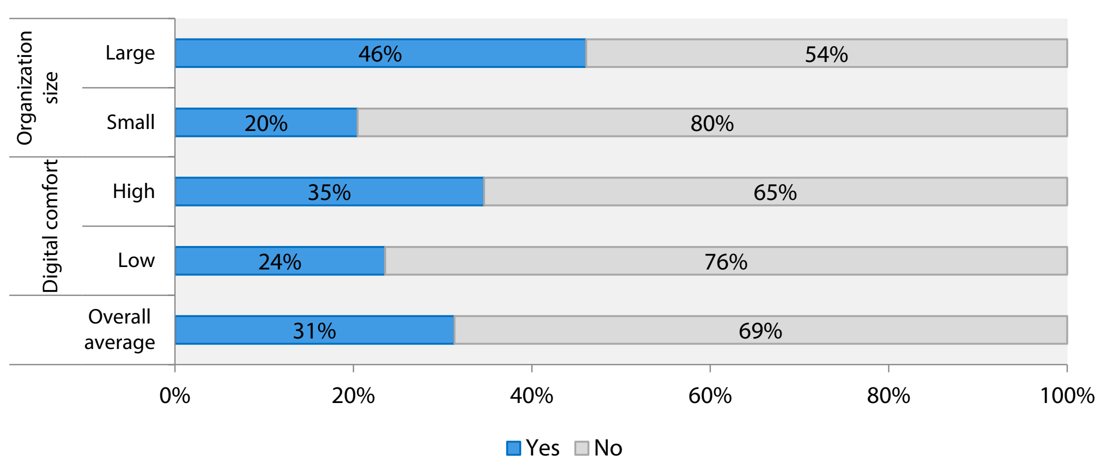
Figure 130: F1. Purposes of digital management tools, by digital comfort (arts organizations)



n=710
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that large organizations are over twice as likely to keep digital client account files. The difference between organizations with high and low digital comfort is less extreme, but digitally comfortable organizations are about 40% more likely to maintain digital client records.

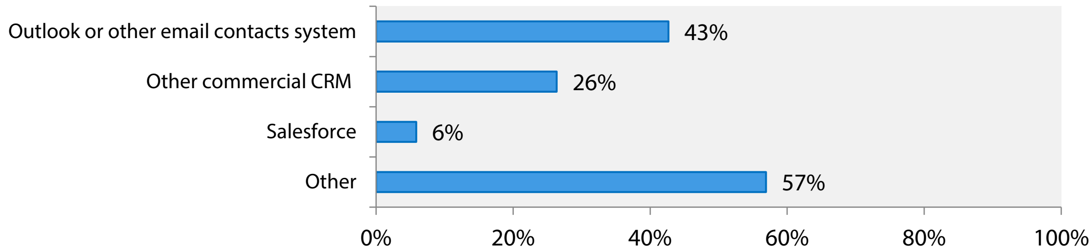
Figure 131: Collection of digital client account files, by digital comfort and organization size (arts organizations)



n=763
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that Outlook (or another email client) was the most common type of CRM software used by organizations.

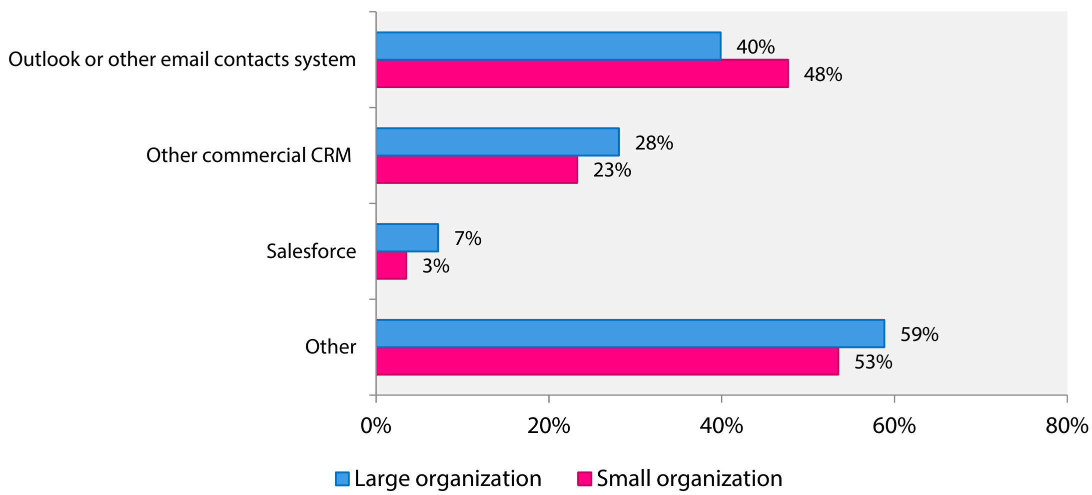
Figure 132: CRM software used (arts organizations)



n=102
source: Nordicity Arts in a Digital World survey (2016)

As the following figure illustrates, small organizations were more likely to use Outlook (or another email client) than their larger counterparts, while larger organizations made up this gap with their more prominent use of Salesforce and other commercial CRMs. Overall, this suggests that larger organizations are more likely to use dedicated CRM software, as opposed to the more convenient and multifunctional email applications. Similarly, digitally comfortable organizations are less likely to rely on Outlook (or another email client) as their CRM platform.

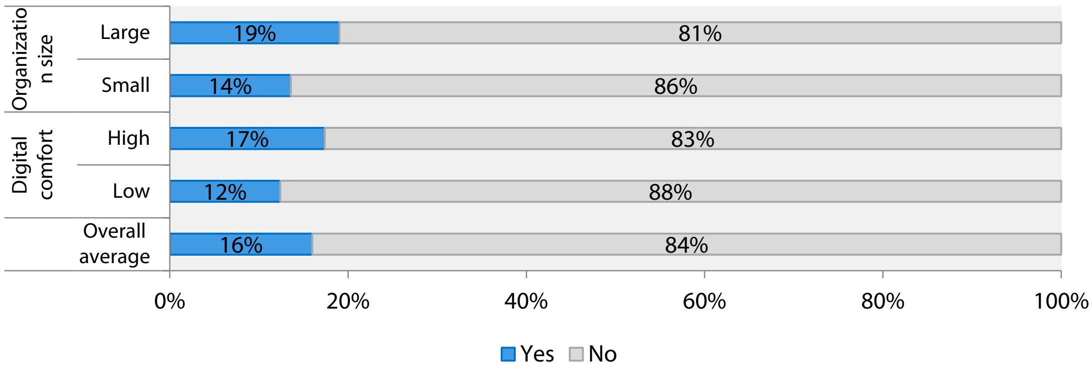
Figure 133: CRM software used, by organization size (arts organizations)



n=102
source: Nordicity Arts in a Digital World survey (2016)

The figure below illustrates that very few organizations (16%) reported co-investing in digital management tools with other organizations. This strategy was slightly more prevalent among large organizations with a higher level of digital comfort.

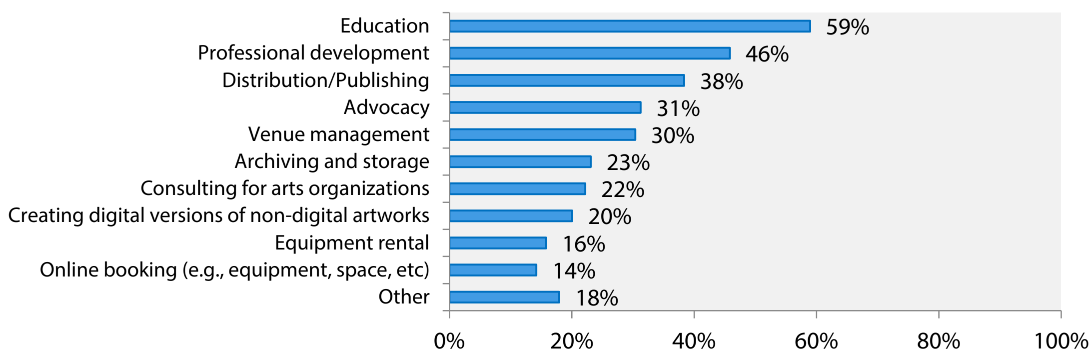
Figure 134: Co-investment in digital management tools, by organization size and digital comfort (arts organizations)



n=763
source: Nordicity Arts in a Digital World survey (2016)

As illustrated in the chart below, education is the most prevalent service offered by arts organizations. This service is followed closely by professional development, distribution/publishing and advocacy.

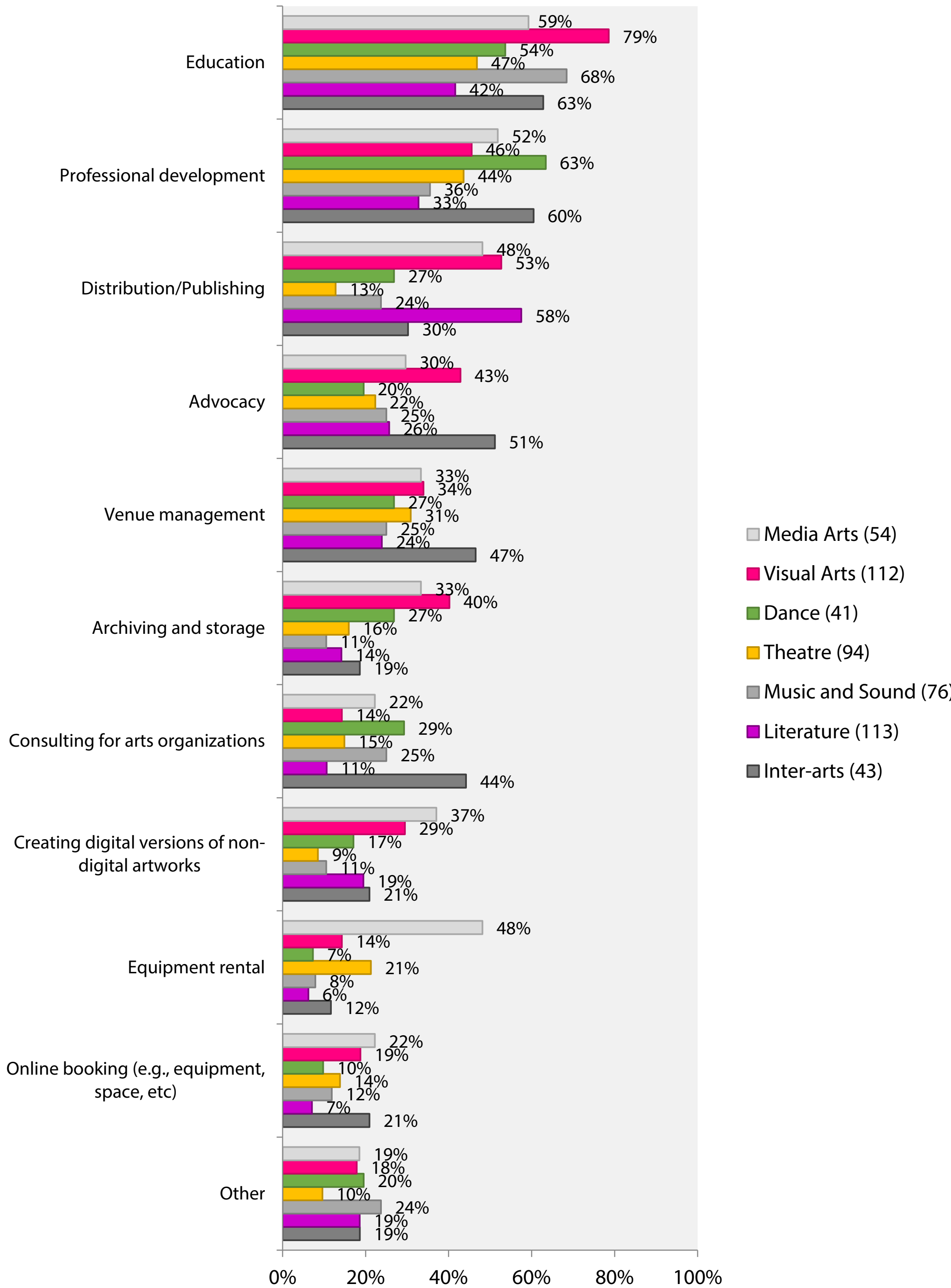
Figure 135: Types of services offered (arts organizations)



n=563
source: Nordicity Arts in a Digital World survey (2016)

As one might expect, the nature of services offered by arts organizations varies considerably depending on the organization's primary discipline. The following figure shows that visual arts and music/sound organizations are the most likely to offer educational services, while dance and inter-arts are the most likely to provide professional development. Literature and visual arts are the most likely to be involved in distribution and publishing. Advocacy is most popular among organization working in inter-arts and visual arts.

Figure 136: Types of services offered, by discipline (arts organizations)

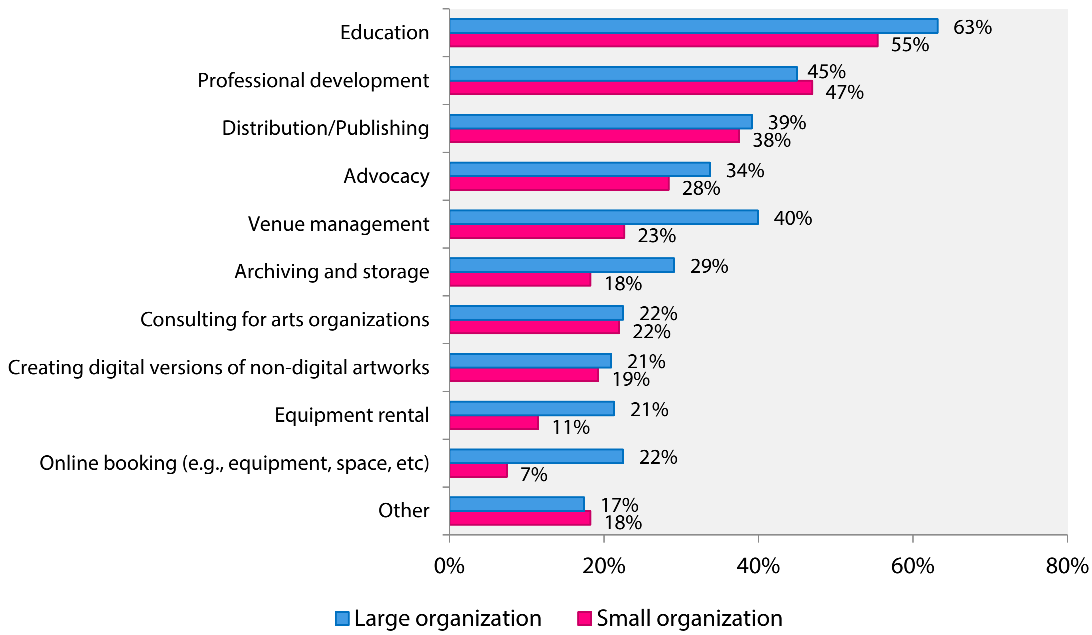


n=533

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

The following figure shows that venue management, equipment rental, and online booking is significantly more prevalent among larger organizations. With those exceptions, the range of services offered is very similar for large and small organizations. As one might expect, the number of services offered by larger organizations (averaging 3.6) is somewhat broader than that offered by their smaller counterparts (averaging 2.9). This trend also applies to digitally comfortable organizations: groups with higher digital comfort averaged 3.4 services each, while their less comfortable peers offered 2.5 services on average.

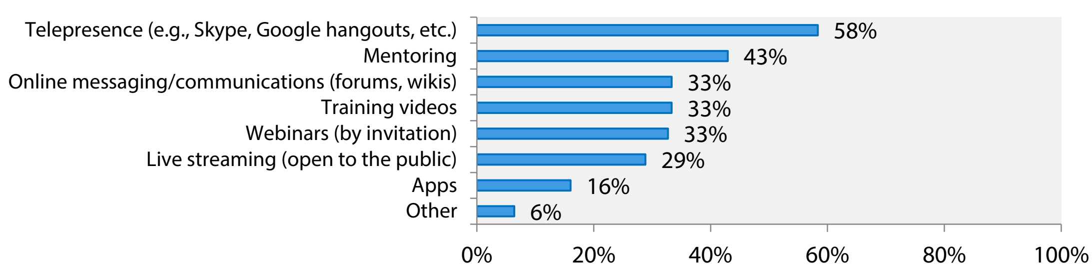
Figure 137: Types of services offered, by organization size (arts organizations)



n=563
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that the most commonly used digital tools for education and professional development within an organization are telepresence, and mentoring.

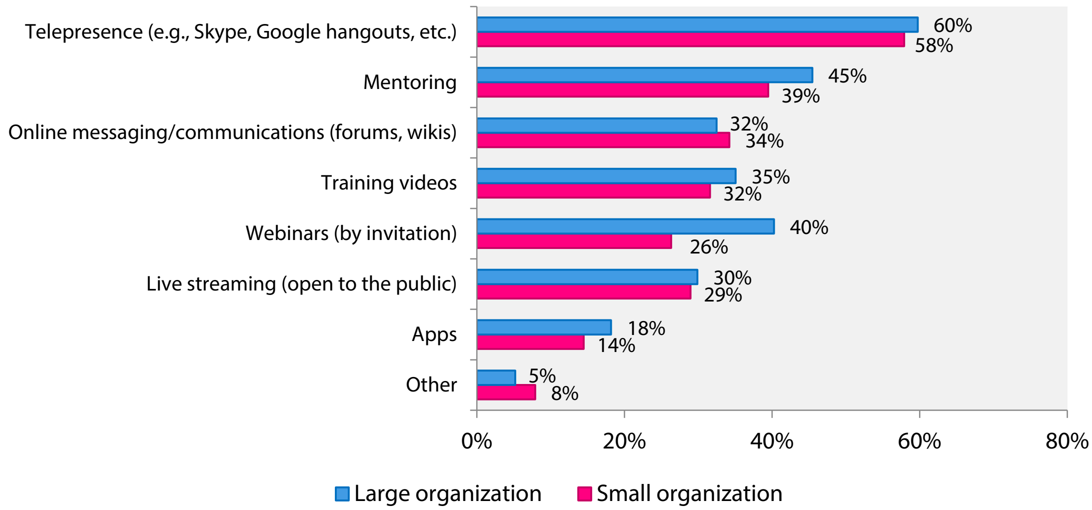
Figure 138: Types of digital tools used for education and professional development work (arts organizations)



n=156
source: Nordicity Arts in a Digital World survey (2016)

As the following figure illustrates, large organizations are considerably more likely to use webinars for professional development than their smaller counterparts. Smaller organizations, on the other hand, are slightly more likely to use online messaging.

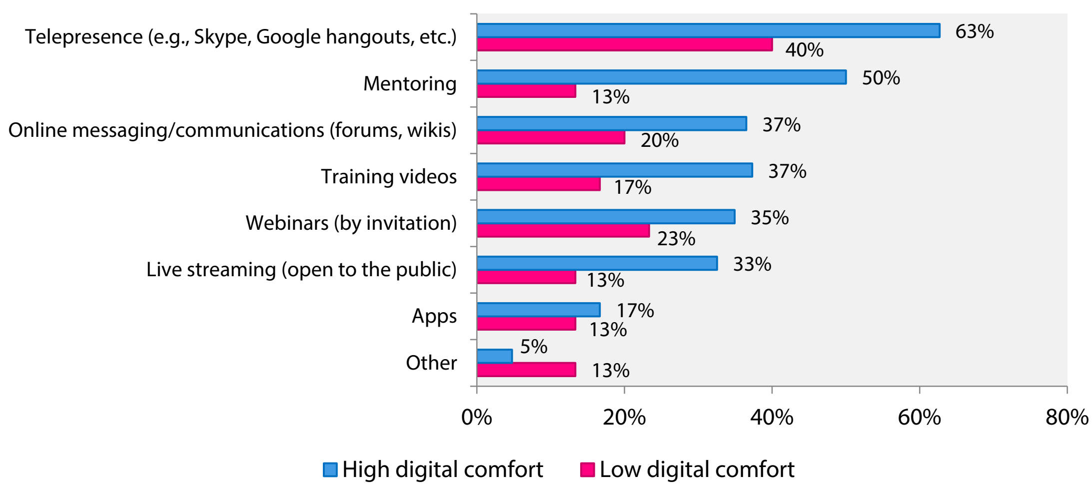
Figure 139: Types of digital tools used for education and professional development work, by organization size (arts organizations)



n=153
source: Nordicity Arts in a Digital World survey (2016)

When these results are broken out by digital comfort, there is a stark difference between the two groups. Whereas digitally comfortable organizations use an average of 2.8 tools, organizations with a low level of digital comfort typically use only 1.5 tools on average. This difference is most prominent in the use of mentoring, which suggests that organizations with a low level of digital comfort may be missing out on a means to improve their digital comfort.

Figure 140: Types of digital tools used for education and professional development work, by digital comfort (arts organizations)



n=156
source: Nordicity Arts in a Digital World survey (2016)

The following figure shows that just under half of organizations (46%) use digital tools to obtain stakeholder feedback. This practice is considerably more prevalent among large organizations and those with a high level of digital comfort, with over half of these organizations reporting that they do so.

2.5 Key Observations

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.

The concentration of users and uses among a small number of digital tools suggests that survey respondents have not integrated technology into all aspects of their activities with equal success. Artists' use of apps is an extreme illustration of this trend: on average, only 9% of artists reported creating an app and those with a high level of digital comfort were six times as likely as their less comfortable peers to do so. However, of artists that did create apps, 75% did so for creative reasons. These figures suggest that, among artists, app creators are an exclusive group who have high levels of digital comfort and are thus able to use this technology as part of their creative process. In contrast, websites and social media are more user-friendly tools that a larger numbers of survey respondents use. Furthermore, these tools are more likely to be used to share existing work than to create new art.

Aside from creative applications of technology, sales and dissemination is another area where digital tools are not being effectively employed. **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**. The incomplete adoption of technology for commercial purposes is also seen in the use of online payment systems: while the majority (65%) of arts organizations use one, less than half (42%) of arts organizations do so.

Crowdfunding confirms the importance of digital technology for promotional purposes rather than as a source of funding. Although the majority of survey respondents indicated that raising money was a primary motivation for conducting a crowdfunding campaign, 25% of organizations and 12% of artists did not select this option. **For both groups, generating interest was the second most common reason for crowdfunding.** This finding demonstrates that online tools are frequently employed to raise awareness of the arts even if this does not translate to increased revenues.