Arts Council of Northern Ireland

Digital Ambitions Survey Findings

Analysis by Arts Council of Northern Ireland Strategic Development Department.

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Arts Council of Northern Ireland Digital Ambitions Survey

This research report highlights the views of a sample of the arts and creative sector on key issues surrounding the use of digital within the NI arts ecology. The Arts Council of Northern Ireland (ACNI) would like to thank everyone who responded to this survey.

This page highlights a number of verbatim anonymous quotes from respondents that raise some of the key issues identified, in their own words:

"The past 12 months has highlighted quite dramatically the absolute necessity of integrating digital technology into, and encouraging digital engagement with, the arts."

"We believe that while live-to-digital is not the whole future, it is here to stay, and is likely to be an essential element of long-term success for theatre organisations."

"The commonality of the use of digital technology by children born after 1990 makes the embracing of digital engagement processes in the arts in all its forms and methodologies a MUST for the future."

"Many organisations have finally been pushed into the digital space over the past year, with many successes but also many issues."

"There is both a skills gap AND a Human Resources gap in addressing digital needs in the organisation as current staff team are already overstretched with ongoing roles."

"Training us to acquire skills won't help as much as access to the right people with the right skills."

"Artists creating digital art should be fully supported with resources that include expertise - a technician."

"Digital activities is always the output element that falls by the wayside due to increased workload and lack of staff."

"It has limited income possibilities, as people expect free or heavily subsidised experiences; also there is limited revival potential."

"Digital Art is not as widely known and supported in NI as it is elsewhere in UK / Europe."

"High quality digital art needs to be well funded in Northern Ireland in order to allow artists to produce professional, high quality digital art."

"Digital engagement has helped audiences with accessibility issues and has extended to international audiences too."

"We must recognise and embrace Digital Technology as an Equality of Access requirement for future generations."

Contents

Executive Summary

The Arts Council of Northern Ireland's Digital Ambitions Survey was an online survey on the Citizen Space platform which ran from 5th March to 8th April 2021. This survey covered the following themes:

- Uses of digital
- Training and support
- Impact of Covid-19
- Monetising digital
- Digital equipment needs
- Collaboration and shared spaces

A total of 57 responses were received across 28 questions and 88% (n=50) of the respondents have been funded by the Arts Council of Northern Ireland (ACNI) before. The survey used convenience sampling, and the online survey was distributed across ACNI channels including e-shot, website, and social media. This survey was intended to take a snapshot of the sector, but due to sample size it cannot be considered representative of the sector.

Use of Digital

The most commonly used areas of digital are:

- Websites (93%)
- Social media (91%)
- Creating digital arts or cultural work (77%)

The least commonly used are:

- Customer relationship management (37%)
- paid online advertising (35%)
- Maintaining a blog / vlog (32%)

Respondents' greatest ambitions were:

- To use live streaming (26%)
- sell tickets online (25%)
- Maintain a blog / vlog (25%)

Respondents require more skills in:

- Data Analysis (40%)
- Customer Relations Management (40%)
- Search Engine Optimisation require more skills (37%)

Online Audience

- Global reach but global competition
- Different habits of the audiences; especially by age
- Equality of access; those that cannot engage digital due to age, skills, or lack of technology

- However, for those with a disability that prevents attendance or those far from venues geographically, digital can increase equality of access

- How to measure engagement digitally

    72% of respondents created digital content before March 2020 while every respondent has created digital content since March 2020.

    Only 5% of respondents felt that their digital output was the same before and after the outbreak of Covid-19.

    Remote engagement through Covid-19 pandemic

    - 88% used online conferencing software
    - 58% used online chats and real time commenting
    - 54% of organisations had been able to live stream
    - 4% had been unable to directly engage with their audiences through the Covid-19 pandemic
    - 86% felt that their engagement with audiences was either successful or very successful throughout the Covid-19 pandemic

Innovation and new technology

- Arts needs to keep up with audience engagement (phones/tablets) and digital tech (immersive)
- Need for online sessions to be more interactive to improve immersion and facilitate learning
- Request for funding to experiment and develop content for new tech / online platforms
- 58% of respondents want to increase their skills in immersive / emerging technology

Digital as a medium versus digitisation

- Feeling that digital arts cannot be compared to the in-person arts
- However some art exists only for the digital space
- Recognition that digital marketing is not the same as digital arts content

    Respondents felt digital could help them the most to:

    - More widely distribute your creative content (82%)
    - Provide an additional source of revenue (81%)
    - Improving the quality of content creation (79%)
    - Improve the quality of their service provision (79%)

Staff Capacity

- Digital content is time consuming; this raises issues of capacity, skills and experience.
- Many organisations outsource digital elements of their programme which allows suitably skilled workers to carry out the task but limits the amount of digital content they can afford to create

    Staff with a digital remit:

    - 11% of respondents had no staff within their organisation with a digital remit
    - 39% or organisations have less than 25% of their staff with a digital remit

Skills and training

- Debate of upskilling staff versus accessing freelance specialists
- If staff are trained then retention is a key issue if time and money are invested
- Skills often learnt on the job rather than formally trained, and disparity in expertise across sector
- Skills need to be specific to organisations' needs – not generic sessions

What knowledge and skills would you most benefit from?

The top three areas of knowledge and skills identified

- Video and visual content (63%),
- digital marketing and strategy (60%) and
- Immersive / emerging technology (58%)

There was a feeling that the future is leading towards new immersive technologies, but for others it was still necessary to focus on skills in existing videography/lighting/editing production techniques.

Monetisation of Digital

- limited income possibilities,
- Difficult to get the commitment of audiences to pay.
- Concerns that digital art can be exploitative, taking the ownership of work away from the artists.

Have organisations been able to monetise digital?

- 49% have been able to digitise their digital content,
- 11% do not want to monetise this content.
- Online sales and ecommerce was the most successfully used

The two methods of monetisation that show the greatest opportunity for growth:

- online sponsorship / donation and
- paid content for streaming / online distribution
- Each have been used successfully by less than 20% of organisations, however there are over 60% of respondents who would be keen to try these methods of monetisation.

Introduction

The Arts Council of Northern Ireland's Digital Ambitions Survey was an online survey on the Citizen Space platform which ran from the 5 March to the 8 April 2021. A total of 57 responses were received across 28 questions and 88% (n=50) of the respondents have been funded by the Arts Council of Northern Ireland (ACNI) before.

The research was designed for ACNI to gain a better insight into the current and intended uses of digital by the sector to inform policy making and grant programme design. As the Covid-19 pandemic forced many creatives to use digital to distribute their work and reach their audiences the survey was released to draw upon experiences of the creative sector during 2020/21.

The survey used convenience sampling, and the online survey was distributed across ACNI channels including e-shot, website, and social media. This survey was intended to take a snap shot of the sector, but due to sample size it cannot be considered representative of the sector.

Survey insights are presented on a question by question basis, and any open text verbatim has been coded and analysed. Questions will note the number of total respondents as some questions were optional and not all results will add to 100% where respondents were allowed to make multiple selections.

Key Emerging Issues

Question 7 - Do you have any general thoughts or do you feel there are any key issues on the use of digital technology and digital engagement in the arts?

Respondents provided significant information through this question, and the responses have been broken down in a number of steps. The first, and highest level step relates to the broad topics discussed:

	Responses including this theme	
High Level Themes	n	%
Digital arts audiences	29	51
Accessibility of digital arts	21	37
Sector training needs	21	37
Cost of producing digital arts and potential funding	19	33
Strategic representation of digital in the arts	18	32
Skills needs	17	30
Leadership for the sector	16	28
Impact of the Covid-19 pandemic	10	18
Digital as an arts Medium	7	12
New technology and their impact on the arts	6	11
Total selections	164	-

Note: as multiple selections were available the response rate will not add up to 100%

Overview of responses

There was a strong response relating to this question creating a considerable amount of qualitative information.

There was a feeling that although digital content creation has been on the rise, the impact of the Covid-19 pandemic has accelerated the use of digital out of necessity. There is the ever present opinion that digital arts cannot replace an in-person arts experience; however there is a growing acknowledgement that digital is a medium of its own and digital arts are separate from simply digitising traditional arts content.

There has been positivity in the use of digital; from speeding up processes to audience reach, however it has also come with issues; such as stretching capacity, skills development and cost. There was also the feeling that more could have been done before now.

However, core to digital is reaching arts audiences; understanding the digital audiences, trying to ensure access to digital art, and being aware of barriers digital audiences face. One very important point raised was the importance of a discussion with young people on type of digital arts content that are of interest to them; or more fundamentally what do they consider as art?

Audiences

Audiences, especially younger audiences are engaging differently with the arts. As more art is being consumed on digital devices, such as Phones and tablets, it is necessary for arts organisations to keep pace with changes. This therefore changes the way that artists and makers reach their audiences and there is a need to support the arts to reach these new audiences.

As audiences develop, there are concerns that artists cannot meet their expectations. The question was posed by one respondent: “how many of us watch an online concert all the way through?" This forces creatives to re-think how audiences are engaged and entertained through digital content and ensure that their content stands out online.

Although artists and organisations have a much larger audiences, they are likely to work across a number of different platforms to maximise their engagement. In this age, audiences expect information quickly, consume significant ‘on-demand’ media, and create the expectation that creatives will have multiple instalments of new content every week. Further, online content can pose challenges for content creators or administrators to manage participant feedback and interactivity. These expectations and challenges impose a massive burden on creatives and organisations to balance the creation of their artwork and sustain their online audience.

As younger generations are increasingly digitally connected, however, it is acknowledged that this digital engagement is necessary. There is the feeling that NI has not been supported as well as other UK or European regions and that as a result we are falling behind in our online presence.

Access

Digital Access as referenced by respondents can be broadly split into two categories: access to the arts and access to technology.

Access to the arts

The online world has been a necessary means of engagement for the arts sector throughout 2020/21 as the Covid-19 pandemic has made physical gatherings impossible for arts and cultural venues. However, this has encouraged many arts organisations to adapt their digital programme for an online audience.

The online digital audience is global and vastly increases the potential number of audience members for arts organisations; however it also places arts organisations in competition against every other worldwide arts and cultural organisations in the online space. Respondents faced the challenge of how do they attract audiences with so much competition.

Digital online arts content also allows access to the arts for members of society who have been unable to engage due to either a disability which prevents in person engagement, are unable to leave their home, or those who live too far away from the arts and cultural experiences that they want to engage with. People living in rural areas have benefitted from digital meetings, classes, and performances.

Digital arts also has benefits for artists to create; some digital technology can allow creatives to overcome physical challenges posed by disability. Online digital also allows artists and creatives to showcase work that would otherwise need to be commissioned by broadcasting organisations.

Access to Digital

Although there are benefits to online and digital arts, it also creates barriers for others. Technology is required to access digital arts or online arts, and for some they may not be able to afford what they need to connect. The 2019/20 Continuous Household Survey identified that 87% of households had access to the internet, with that falling to 80% in the most deprived areas, and falling further in some rural locations[1].

Digital and online engagement also requires some level of digital awareness and ability which may be lacking for some demographics.

Both audiences and creative who stream content, either live streaming their work or watching live performances, are limited by their internet connection; which for rural locations may not be of a high enough speed. This can create latency issues which can reduce the quality or make engagement in this way impossible. Across NI 85% of households have access to broadband, however this falls to 78% in the most deprived locations and further to 76% in Fermanagh & Omagh local author area[2].

This raises questions about equality of engagement, how future audiences can equitably access the arts digitally, and that there is an opportunity now to create an inclusive and accessible infrastructure for the digital arts.

Digital as a Medium

Using online digital platforms has been a necessity throughout the Covid-19 pandemic as live and in person work could not be created. This is true across any artform that relies on an indoor venue or physical space for audiences to engage. There was a strong message that respondents want to be able to engage with audiences in person once more.

There is the possibility that lessons learned from 2020/21 can be integrated into future programming creating a hybrid experience for audiences, and that digital technology can be used to enhance the live experiences of the future. In some counties this enhanced hybrid experience is expected.

It was noted by a number of respondents that a distinction has to be drawn between use of digital for the dissemination of the arts and digital art. Digital can be used to market arts content and arts content can be digitised, but art that is created for the digital space, potentially utilising technology or online platforms as a medium, is a different entity. One response also noted that digital does not mean online; digital art or digitised art can take place in a venue or real world space, not just online.

There were many statements that digital cannot compare with 'real art' or that digital is not a replacement for live and in-person arts; this is echoed across many questions and many respondents. In the context of Covid-19, and the social distancing restrictions, arts organisations have been forced to create digital content to maintain engagement with audiences. This has led to traditional arts programmes being digitised or adapted for digital.

Respondents have felt that this digitisation of arts programming has led to content that feels 'clinical,'

However we must also consider that while these statements are applicable for digitisation of arts content, or adaptation of arts designed to be experienced in person they also cannot apply to digital art which is made specifically for the digital space. Under this lens, responses from the sector could be considered as "art that is digitised or adapted for the digital space cannot replace live and in-person performances or cultural experiences." This statement both correlates with the qualitative findings of the survey but also ensures that art not made for live or in person engagement is exempt.

[1] https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/Home%20Internet%20Access.xls
[2] https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/Home%20Broadband%20Access.xls

Recognition of digital art as a separate entity led to respondents suggesting that it should be separately funded and developed to ensure that high quality work is produced.

Digital Quality

As many organisations have been required to venture into digital arts throughout the Covid-19 pandemic, respondents felt that there were many successes, but also many issues. Organisations have been able to maintain audiences, and reach further into the global audience; however in some cases it was felt that quality was sacrificed to ensure audiences were engaged.

As delivery of digital content is human resource intensive, highly skilled, and expensive it was not always possible to produce content of the standard NI organisations would be capable of. Fears were expressed that release of substandard content could be damaging to the sector; and it was notable that there was a distinct gap in teams who did not have the means or time to upskill in digital and online technology.

Innovation and New Technology

There was an acknowledgement by many respondents that the arts needs to stay abreast of the evolution of audiences, but also constantly adapt to new platforms and new technology. It was felt that NI hasn't been supported as well in these areas as the UK and Europe and that there is investment needed to catch up.

Respondents have raised the increased connectivity of digital conferencing software, but improving these by creating immersive and interactive online experiences for audiences was noted several times. This could allow the combination of some of the benefits of digital reach with some of the benefits of in person attendance. An improved online interactive engagement could facilitate better learning experiences.

Respondents were also keen that there was support for artists and creatives to experiment and explore the possibilities of technology; including online platforms, immersive formats, and 360 video. The importance of expanding audiences' awareness of these formats was also mentioned.

As life returns to normal, there is the possibility of blended activities; combining both in person experiences and digital elements. It was also noted that digital should be explored as a way of enhancing the live and in person arts experiences of audiences.

Monetisation / ecommerce

Monetisation of digital content is a controversial topic, and there was relatively little flagged in this narrative question. One response had noted the success of their ecommerce during the Covid-19 pandemic; which sold the physical work of local creatives. However when it came to the discussion of digital art it was noted that there were limited income possibilities, and that it was difficult to get the commitment of audiences to pay. There were also further concerns that digital art can be exploitative, taking the ownership of work away from the artists; and that as a result the quality of employment can be reduced.

Time and Capacity

It was raised in many responses that digital content is human resource intensive, that specialist skills are required, and that there is a considerable expense involved; whether this is equipment, staff training or expert freelancer costs. Especially in smaller organisations with only a handful of staff, capacity is stretched too far to have extensive online engagement.

Audience expectations are also high with one respondent noting that they expect 4 or 5 pieces of new content per week; and this will create an ongoing human resource or freelance contract to achieve.

There was the request that funding be considered for the production of digital content, especially as this is a cost that organisations do not necessarily budget for.

Funding / Support

It was acknowledged that digital should be supported by ACNI and that it had not received the support in the past that was needed. Respondents believed that this did not feature highly on the agenda as in person engagement has been seen as better that digital engagement.

There was a call for better leadership and for better partnerships between government agencies and that viewing the arts through the lens of the creative industries would help these partnerships. It was also raised that there is a lack of joined up working on training, guidance and best practice, digital infrastructure and networks.

A number of suggestions were provided for how digital could be funded:

- Digital training and skills development are needed but this needs to be based on organisations' needs, and be tailored to these needs. Not generic digital marketing courses.
- Equipment funding would be a way to help build capacity, for example a dedicated ACNI stream for purchasing equipment for the creation of digital projects
- Software license funding is as important as equipment funding as this is necessary for the production of digital art
- Where systems are too expensive, for example custom relations management systems, is there a way that organisations can share this.
- Investment in digitising and archiving requires further funding to promote and create content that supports an archive.
- Funding should not encourage arts organisations into a field where they compete with existing commercial creative industries operating in that area.

Skills sharing and collaboration

Not all arts organisations have been able to receive specific digital training and have relied on the community to share their knowledge. There was a suggestion that a way of skill sharing between companies would be helpful. There was a need identified by one respondents for trusted teachers and collaborators to be identified; and that work at a grass roots level might prompt these networks.

Video conferencing has created really positive opportunities for collaborating and networking which has been positive for many arts organisations. This has also allowed for closer connection with international arts professionals.

Digital Specific Skill Needs

Training for artists and organisations can have a great impact on their ability to deliver digital content. One respondent noted that mentoring young people with no skills in digital content creation has been able to propel their work online and reach considerable audiences.

Responses identified either a skill gap, or at least a perceived skills gap. In order to create digital work of a high quality respondents identified a need for high quality training to meet the specific needs of organisations. One respondent stressed the importance of organisations sourcing their own training.

It was acknowledged that artists can also provide visual skills to other sectors and that the arts are already very digitally engaged, but that there was disparity between the skills in the sector and that artists are needed with a broad range of digital skills, including for production, innovation and skills-sharing. One response also encouraged forward thinking to a space where computing is cloud based and a new workforce of highly computer literate professional arts producers would be required.

Respondents note that staff are working as best as they can, and that without digital training staff are doing their best to learn on the job. Arts organisations may also provide advice and shared learning informally on a peer to peer basis.

Specific skills and training that were mentioned in the narrative of this question and later questions include:

- Communication technology
- Livestreaming
- Digital arts facilitators
- Advice on software, and training to use chosen software
- Immersive and emerging technology
- Video production skills (including lighting and editing)
- 360 video

Further, practical help and guidance was requested for policy development and best practice on consent, copyright and permissions and that 'endless generic low level digital marketing skills training' is avoided.

Data Collection and Monitoring

With the increasing use of digital and funder requirements to measure performance, respondents noted that guidance is needed in how they measure their digital audience engagement. One respondent noted the importance of creating a detailed picture of the online audience. Further, the distinction between digital marketing and digital editorial content is important.

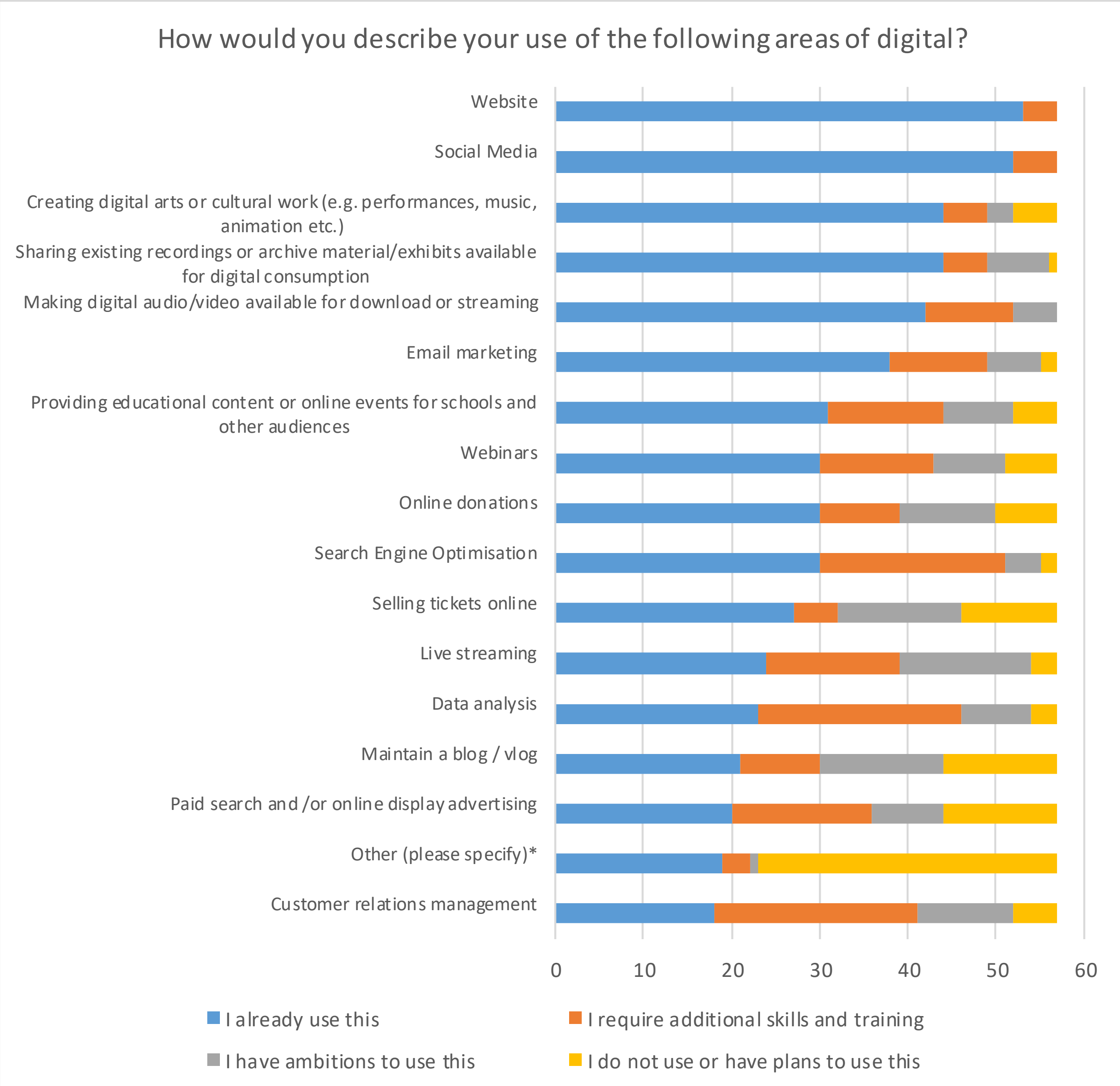
The use of social media and online platforms creates a disparity in data as metrics are not always consistent; and provide variable levels of detail. Respondents asked if the Arts Council had any best practice guidance, or if it would be possible to create a framework to assist in the collection and presentation of data. It was also felt that co-operative working with other Arts Councils to agree standard metrics would be of assistance. The need was also raised for sectoral leadership to determine best practice for the digital dissemination of the arts.

Use of Online and Digital

Question 8 – How would you describe your use of the following areas of digital?

The chart below shows how respondents currently use, or would like to use technology in the future. This question was mandatory, and 100% response rate was observed across each of the digital uses.

The most commonly used areas of digital are at the top of the graph, including websites, social media, creating digital arts or cultural work, and the least commonly used are shown at the bottom of the graph, including customer relationship management, paid online advertising, and maintaining a blog / vlog.



As part of this question respondents which areas of digital they require additional skills and training for. The top results for this were Customer relations management (40%), data analysis (40%) and search engine optimisation (37%). Other results for additional training included Paid search / online advertising (28%), live streaming (26%), webinars (23%) and providing educational content online (23%).

Respondents' greatest ambitions were to use live streaming (26%), sell tickets online (25%) and maintain a blog / vlog (25%) while respondents were least likely to use paid search / online advertising (23%), maintain a blog / vlog (23%) and sell tickets online (19%)

	Response (n)			
Digital Technology	**I already use this**	**I require additional skills and training**	**I do not use or have plans to use this**	**I have ambitions to use this**
Website	53	4	0	0
Maintain a blog / vlog	21	9	13	14
Selling tickets online	27	5	11	14
Search Engine Optimisation	30	21	2	4
Customer relations management	18	23	5	11
Online donations	30	9	7	11
Email marketing	38	11	2	6
Social Media	52	5	0	0
Live streaming	24	15	3	15
Webinars	30	13	6	8
Sharing existing recordings or archive material/exhibits available for digital consumption	44	5	1	7
Making digital audio/video available for download or streaming	42	10	0	5
Providing educational content or online events for schools and other audiences	31	13	5	8
Paid search and /or online display advertising	20	16	13	8
Data analysis	23	23	3	8
Creating digital arts or cultural work (e.g. performances, music, animation etc.)	44	5	5	3
Other (please specify)*	19	3	34	1

Other responses included use of immersive or VR technology, or interactive work. Using digital this way can allow the user to have more agency within their experience of digital arts.

A number of suggestions were made for hosting artwork online; including archives of NI arts, an e-publishing app for customers, and to host training and sharing of resources.

The pandemic has required the use of remote conferencing software, and online platforms have been noted for performances and committee meetings, but this way of using digital may also be of use for global interchange opportunities. Another response referenced the rights issues for streaming which raises the issue of how a shift to digital platforms can ensure IP is protected.

One respondent made reference to understanding and use of non-fungible token based art.

Question 9 - How many of the staff within your organisation play an active role in carrying out and developing your digital activities?

The ability to use digital can be influenced by the number of staff with a digital remit. The table below shows the survey results. More than half of the organisations taking part stated that 50% or less of the staff have a digital remit within their job roles.

For 11% of the respondents there were no staff within their organisation with a digital remit, and a total of 39% or organisations have less than 25% of their staff with a digital remit.

Response	n	%
No staff have a digital remit	6	11%
1-25%	16	28%
26-50%	11	19%
51-75%	7	12%
76% or more	17	30%
Total	57	100%

In order to clarify this further, respondents were given the opportunity to describe in more detail the arrangement of their staff's digital remit.

Respondents have noted that creation of digital content is time consuming and requires a specific skill set. Without resources and skills for this work, one respondent noted that it can 'fall by the wayside'. For some organisations they have in house digital officers with specific skills, such as website coding, but for others they do not have the funds for a dedicated officer.

In some cases the digital responsibility is split between all staff members. While in some cases this can work where digital is fundamental to the core mission of the organisation, in many cases this raises issues of capacity, skills and experience; comments noted that there is both a 'skills gap and a human resources gap'. Some feel that a dedicated officer is necessary, and in some cases existing digital officers have been lost due to funding, or organisations have been able to raise funds for these job positions.

Many organisations outsource digital elements of their programme which allows suitably skilled workers to carry out the task, but the limited working hours of outsourced staff means that the ambitions of the organisations are not met as there is not enough time to engage as often or as flexibly as they require.

How can Digital best assist you

Question 10 - In the future, which of these areas of your creative programme can digital technology best assist you?

The response across all of these uses was high, with the lowest area of digital technology use being 42% (create business efficiencies). For the remaining 6 options in this questions over 60% of respondents wished to use digital technology for these purposes in the future.

Distribution and creation of revenue are the two top ways that respondents feel digital technology can assist.

Reponses	n	%
More widely distribute your creative content	47	82%
Provide an additional source of revenue	46	81%
Improve the quality of content creation	45	79%
Improve the quality of the services you provide to clients / customers	45	79%
Translate existing or new content into a digital / online format	41	72%
Create content specifically for an immersive format	38	67%
Create business efficiencies and make your programme easier to manage	24	42%
Other	6	11%
None of the above	0	0%

Note: as multiple selections were available the response rate will not add up to 100%

Respondents were able to provide additional information on other future uses of digital within the survey. Two of the responses could be categorised under the response ‘more widely distribute your creative content’ to both better reach new audiences.

Two comments raise the use for digital in creating better connectivity and allowing better collaboration. The Covid-19 pandemic has changed the way we interact with people remotely, and digital technology has been fundamental to this.

Two other comments focus on access and inclusion; whether this is ensuring that the most deprived areas have investment in equipment or whether digital can increase the inclusion of arts programmes and services.

A respondent also notes that digital has not been able to earn significant income, and that it cannot replace the money generated from live arts; this echoes findings from ACNI’s Covid-19 emergency survey which showed that organisations had earned a significantly smaller income through digital means over the pandemic than they would have expected through live ticketed events.

Training and Support

Question 11 - What kinds of support would you benefit from?

The respondents felt that partnership grant projects (81%) would be the support they would benefit most from followed by skills and training (72%). Less than half of respondents felt that information sessions would be of benefit, and the sample showed that there was little interest for formal qualifications (19%).

Reponses	n	%
Partnership grant projects	46	81%
Skills and training	41	72%
Mentoring and direct support	37	65%
Information sessions	24	42%
Formal Qualifications	11	19%
Other	5	9%
None of the above	1	2%

Note: as multiple selections were available the response rate will not add up to 100%

Of the 7 other suggestions received 6 related to how funding could be used to provide digital support. Four of these suggestions related to funding of dedicated digital officers, one requested resources to engage with experienced digital professionals, and one sought investment in a community facility to gain skills and knowledge.

One comment suggested a framework that sets out the sectors digital ambitions and allowed organisations to carry out internal digital engagement and resource audits. There was then the suggestion that dependent on the findings tailored support and funding could be given.

Knowledge and Skills

Question 12 - What knowledge and skills would you most benefit from?

The top three areas of knowledge and skills identified by the respondents were ‘video and visual content’ (63%), ‘digital marketing and strategy’ (60%) and ‘immersive / emerging technology’ (58%). Two of these top responses support programmes that would support digital content development.

In question 8 34 respondents (60%) stated that they either needed additional skills or had ambitions to use customer relations management and 19 respondents (33%) either needed additional skills or had ambitions to sell tickets online, however in question 12 there was only 23% of respondents who felt they would benefit from knowledge and skills in Box office and Customer Relationship Management.

Reponses	n	%
Video and visual content	36	63%
Digital marketing and strategy	34	60%
Immersive / emerging technology	33	58%
Data Analytics	25	44%

Online advertising (including Display ads, Social Media ads, Video ads and Search Engine Marketing)	25	44%
Search Engine Optimization	22	39%
ecommerce and merchandising	19	33%
Social media	18	32%
Email marketing	18	32%
Website development / maintenance	17	30%
Box office and Customer Relationship Management	13	23%
Other	7	12%
None of the above	4	7%

Note: as multiple selections were available the response rate will not add up to 100%

On average respondents selected 5 (4.75) skills they would most benefit from, however this is skewed slightly by those respondents selecting high number of skills. This is indicated by a lower median that 4 skills were selected. The relatively low number of respondents selecting more than 10 skills (4 respondents, 17% of selections made) indicates that the skills needs were fairly evenly distributed across the sample.

By focussing on those respondents who were more selective in their responses (those within the first to third quartile) indicated that it was more likely these respondents selected 'other', 'video and visual content', 'immersive / emerging technology', and 'digital marketing and strategy'.

Other comments

It was recognised that much of the technology covered in this survey is 'already water under the bridge,' and that the future is leading towards new immersive technologies despite other comments seeking skills in existing videography/lighting/editing production techniques. However when forward looking to future uses of digital there was concern raised that existing knowledge and skills were still supported and properly funded.

One comment suggested learnings from live-to-digital from digital platforms and benchmarking data to better plan and forecast. With the impact of Covid-19 on remote working and online engagement with the arts this may be an ideal time to compile these lessons with the experiences are fresh before society begins to return to normal.

It was re-iterated by one respondent that the organisation would save money if the skills to undertake digital skills were available in house, as they outsource much of the digital work as there is not the available resources to pay for salaries.

Two other comments raised issues of intellectual property; one in relation to license negotiations for digital events and the other in relation to non-fungible token based arts.

Impact of Covid-19

The majority of respondents made digital content before the Covid-19 pandemic (79%), however every organisation that took part in the survey has created digital content since March 2020 and the Covid-19 pandemic. Further, the majority of participating organisations have greatly increased their digital content creation (75%) through the Covid-19 pandemic, while only 5% consider their digital output to be the same as before March 2020.

Question 13 - Did you create digital content before Covid-19 lockdown in March 2020?

Responses	n	%
Yes	41	72%
No	16	28%
Total	57	100%

Question 14 - Have you created digital content since Covid-19 lockdown in March 2020? - During C19

Responses	n	%
Yes	57	100%
No	0	0%
Total	57	100%

Question 15 - Has your digital content creation increased since Covid-19 lockdown in March 2020?

Reponses	n	%
Greatly increased digital content.	43	75%
Increase in digital content	11	19%
Content the same	3	5%
Total	57	100%

Engaging with Audiences Remotely

Organisations have been able to engage with their audiences remotely. Online conferencing software has been used by 88% of the survey respondents. Online chats and real time commenting was used less frequently (58%) while 54% of organisations had been able to live stream. 4% of the respondents had been unable to directly engage with their audiences through the Covid-19 pandemic.

Question 16a - Have you been able to directly engage with your audience digitally through Covid?

Reponses	n	%
Using online conferencing software, such as Zoom	50	88%
Online chats / real time commenting	33	58%
Live streamed content on social media	31	54%
Other	12	21%
I have not been able to engage directly with my audiences digitally	2	4%

Note: as multiple selections were available the response rate will not add up to 100%

Of the 12 participants also selected ‘other’, the majority (n=11) identified unidirectional digital content as their main method of engaging with their audience base, for example online artist talks or performances.

A number of participants described opportunities to allow interaction with their audiences, with 2 referencing social media and 2 mentioning interactive online workshops and one using online conferencing software (MS Teams). These methods allow for feedback from the audiences and allow direct engagement with the audience.

This question was aiming to determine how organisations allow their audiences to interact with them, and the other responses suggest this question could have been better written to ensure that was conveyed.

The vast majority of respondents felt that their engagement with audiences was successful throughout the Covid-19 pandemic (86%), while 9% felt that it had been very unsuccessful.

Question 16b - If you have been able to engage with your audience digitally, how successful do you feel this has been?

Reponses	**n**	**%**
Very Successful	26	46%
Successful	23	40%
Neither Successful nor Unsuccessful	2	4%
Very Unsuccessful	5	9%
I have not engaged with my audiences digitally	1	2%
Total	57	100%

Monetising Digital

Just under half of respondents (49%) have been able to monetise their digital content, and of those that have not been able to monetise their digital content around 20% (11%) of the sample) do not want to monetise this content.

Question 17 - Have you been able to monetise any of your digital content?

Responses	n	%
Yes	28	49%
No	29	51%
Total	57	100%

Question 18 - If you haven't been able to monetise your online content, would you want to find ways to monetise it?

Reponses	n	%
Yes	28	49%
No	6	11%
I have been able to monetise digital content	23	40%
Total	57	100%

Question 19 - Which of these methods of monetisation would you consider?

	Used successfully	Keen to try	Tested unsuccessfully	Will not consider
ecommerce / online sales	32%	47%	4%	18%
Online ads / commercial	30%	35%	2%	33%
Paid entry to digital content	28%	51%	5%	16%
Online sponsorship / donation	19%	60%	5%	16%
Paid content for streaming / online distribution	18%	61%	2%	19%
Membership system	16%	44%	2%	39%
Other (please specify)	11%	19%	0%	70%

Note: as multiple selections were available the response rate will not add up to 100%

Respondents were able to provide an indication of the types of monetisation they have already used, or would consider using in the future. The responses have been ranked in order of those used by the most respondents.

Online sales and ecommerce was the most successfully used, and almost half of respondents were keen to try this method of monetisation. The least utilised method of monetisation was membership systems for content, although 44% of respondents would be keen to try this.

The two methods of monetisation that show the greatest opportunity for growth are 'online sponsorship / donation' and 'paid content for streaming / online distribution.' Each of these have been used successfully by less than 20% of organisations, however there are over 60% of respondents who would be keen to try these methods of monetisation.

Adoption of a ‘membership system’ or ‘online ads / commercials’ were those options that most would not consider adopting at between 30-40% of all respondents.

Of the responses for ‘other’ methods of monetisation the most prevalent were for hosting online live workshops and live events (n=2). Another response suggested monetising blended events using different platforms side by side.

Barriers to monetisation

Respondents were asked what barriers they have faced in the monetisation of their digital content. The most common barrier was staff capacity and time (47%). A quarter of respondents felt that monetisation of digital content was not within the mission of their organisation.

Respondents were given the option to select ‘other’ methods of monetisation and further information was supplied for these responses. Articulated in slightly different ways, staff time and capacity is raised again as a concern, and having the funding or tailored support to move towards monetisation of funding. Three responses approached the subject of support and advice, either in terms of how to monetise content, branding / marketing advice, and how services and content could be taken directly to an end user. Where steps taken by one respondent have been taken towards monetisation it has been with substantial consultation with other organisations in the sector, and for others they have established content that they hope can later be sponsored.

Issues of monetisation of arts and cultural content was raised; is it right to monetise content that has been long established as free to the end user and are non-profit organisations justified in monetising significant amounts of their content? For some arts organisations they have not pursued monetisation other than asking for donations.

Monetisation is also subject to market conditions and in some cases respondents felt that there were no formal structures for monetising specific types of content, and that competition online would be at a global level. It was also raised whether now, with the impact of the pandemic on audiences finances, it was right to monetise content. Further certain types of monetisation, notably interruption advertising, can be intrusive and fail to reach the intended audience and this respondent felt that patronage options would be more suitable.

Question 20 - What are the barriers to monetising your content?

Response	n	%
We do not have the staff capacity/time to monetise our content	27	47%
I do not have the skills / expertise to monetise my online content	16	28%
Monetising online content is not within the mission of the organisation	14	25%
We do not have the equipment to digitise and monetise our equipment	13	23%
No barriers to monetisation	12	21%
Other	11	19%
I do not believe there is a market for my product online	2	4%

Note: as multiple selections were available the response rate will not add up to 100%

Digital Equipment Needs

Question 21: What digital equipment do you currently use for your core creative programme?

Key word analysis was conducted of the responses to this narrative questions, and organised into high level themes. The figures in the table below reflect the number organisations who have stated the use of the following hardware, and either stated directly or indirectly that software in the following themes were used.

Theme	Hardware (n)	Software (n)
Computing	42	NA
Communication	26	21
Images:	41	37
Still	0	25
Moving	27	25
Virtual	3	12
Lighting	8	3
Audio	15	21
Display	11	2

General computing was the most predominant hardware noted by respondents; which included desktop or laptop computers, iPad and tablets. This was not collected for software, as the use of software is contingent on having suitable computing.

Over half or respondents noted their use of communication hardware; including mobile phones, live streaming or broadcasting equipment, while many respondents also used communication software including video conferencing and ticketing software.

The most common artform specific equipment and software used was images; this was further broken down into still images, moving images, and virtual images. Software editor use was high for both still and moving image; which would include Adobe creative suite or other editing software. A significant number of respondents used virtual imaging software which is a broad term to include gaming engines, motion capture, photogrammetry, architectural, Computer-Aided Design (CAD), or rendering software.

Audio hardware and software was also used, although with many devices having these built in, the use may be higher than identified. Lighting related to live lighting rigs and lighting controlling software, while display related to audio and visual outputs including projection, sound systems and screens.

Question 22: What digital equipment do you require for your future programming?

As part of the survey respondents were asked what digital equipment they have or need to invest further in; these results have been separated into three separate tables to allow easier interrogation.

Those that selected 'We already have this equipment'

Examining which forms of digital equipment respondents already have shown that the least common are 'interfaces for recording and streaming' (21%) and 'display equipment' (26%).

The other option allowed organisations to specify which other equipment is used, and respondents identified 3D printers; however most of the responses were relating to the need for ongoing investment in equipment and software to keep up to date with technological developments and with the engagement habits of the younger audiences.

Those that selected 'We already have this equipment'

Equipment	n	%
Computers	38	67%
Microphones	22	39%
Tablets or iPads etc.	19	33%
Cameras or video cameras	19	33%
Lighting equipment	19	33%
Display equipment	15	26%
Interfaces for recording or streaming	12	21%
Other	12	21%

Those that selected 'We do not need this equipment'

Display equipment and tablets/iPad were most commonly identified as not needed by respondents at over 21%. The equipment that fewest did not require was computers (4%) and cameras / video cameras (5%). It is important to note that while this question identified the number of organisations who did not need particular equipment, it did not capture how important equipment was to those who did need it.

Due to the nature of this question there were few narrative responses for those that did not need 'other' types of equipment. The one comment referenced mobile Wo-fi hubs that can be distributed, although it is not clear if this is in fact equipment that would be required.

Those that selected 'We do not need this equipment'	n	%
Other	21	37%
Display equipment	13	23%
Tablets or iPads etc.	12	21%
Lighting equipment	7	12%
Microphones	5	9%
Interfaces for recording or streaming	5	9%
Cameras or video cameras	3	5%
Computers	2	4%

Those that selected 'We need to invest further in this equipment.'

This question allows identification of the future equipment needs of the respondents. The equipment which was identified as needing most investment was interfaces for recording or streaming and cameras and video cameras; both having a response rate of over 70%. Tables and iPads (53%) and Computers 37% were those least needing future investment.

Those that selected 'We need to invest further in this equipment.'

Equipment	n	%
Interfaces for recording or streaming	43	75%
Cameras or video cameras	41	72%
Lighting equipment	36	63%
Microphones	35	61%
Display equipment	33	58%
Tablets or iPads etc.	30	53%
Other	25	44%
Computers	21	37%

Given the need for future investment, and the high response rate for 'other' there were a significant number of additional comments specifying future investment. Some of the responses were outside of the scope of the question; focussing on upgrading editing or customer relations management software or relating to staff time or digital expertise. Although these cannot inform this question, they do reinforce these as findings from other areas of the survey.

Some responses identified equipment specification for communication either to the internet or between their own IT infrastructure; the need for better mobile data connections, or upgraded computer networking. The shift to immersive technology for some also meant they anticipate needing more powerful computing to ensure they can work with the evolving technologies. It was also highlighted that having back-ups is necessary; and it wasn't specified whether this related to additional pieces of equipment or data storage in the case of unit failure.

Equipment relating to image capture for still images or video was specified, with green screens and support equipment being mentioned in 2 responses. A wide range of equipment was specified including light meters, lens, gimbals, cables etc. These responses would have been anticipated being included within the 'cameras and video cameras' section; which would have made this response the most commonly selected. Similarly, display equipment was specified within the question, with projectors being included within two of the narrative responses; which would have brought its response rate above 60%. Other equipment relating to media playback included turntables and tour guide equipment.

Three responses related to immersive technology; with participants identifying the importance of having equipment that their work will be used on such as games consoles or virtual reality headsets. One response also suggested investment in a virtual reality treadmill – so that developers and users can interact with the work in a more tactile way.

An average investment need of £20,000 was identified by respondents and almost £1m across the revised sample of 56. One outlier was excluded to ensure that it didn't skew the remaining data.

Question 23 - Can you estimate how much you would need to invest in digital equipment for future programming?

Sample (n)	Total	Average
56	£995,200	£19,514

Software Needs

Question 24 - What digital software do you require for your future programming?

'We already have this software'

Content creation (37%) or live streaming software (30%) was the most common for respondents to have, while CRM (customer relations management) software was the least common at only 5%. 26% of respondents selected 'other,' but analysis of their comments only notes that software is an ongoing cost and that there is a need to invest in software as technologies develop.

Software	n	%
Content creation software (etc. image, audio or video editing)	21	37%
Live streaming or online conferencing	17	30%
Other	15	26%
Online ticket sales software or subscriptions	13	23%
Data analysis or presentation software	12	21%
Customer Relationship Management Software	3	5%

'We do not need this software'

Online ticket sales or subscription software was most commonly selected as not needed. Cross referencing this against those that already have this, and those that need future investment suggests that some of the respondents who selected this already have ticket sales software.

The relatively low number of organisations who already have CRM or data analysis software suggest that those who selected they do not need this software have no need for it within their programming.

One specified response from 'other' was present and this stated that software is not a one off expense, but is often a recurring subscription fee. This is important in how it relates to public sector grants.

Software	n	%
Other	26	46%
Online ticket sales software or subscriptions	22	39%
Customer Relationship Management Software	19	33%
Data analysis or presentation software	13	23%
Live streaming or online conferencing	7	12%
Content creation software (etc. image, audio or video editing)	3	5%

'We need to invest further in this software'

On average the responses across all options were higher than in other questions and the most common software that respondents need to invest in further were content creation software (68%) and live streaming and online conferencing (67%).

Further investment in both customer relationship management and data analysis / presentation software was stated by around 60% of the respondents and although the lowest response, ticket sales software still needed investment for around 40% of respondents.

Within the other category, the most regularly referenced issue was that software is often a subscription service, and for some specialised software this incredibly expensive; one quoted at $1k per month.

General connectivity was also important, although this is likely a hardware issue rather than for software investment. Software for business efficiency was mentioned, and in one example having programmes to manage stock control between an online shop and a shop.

Break down of responses by software type

Software	Response	n	%
Content creation software (etc. image, audio or video editing)	We already have this software	21	37%
	We do not need this software	3	5%
	We need to invest further in this software	39	68%
Online ticket sales software or subscriptions	We already have this software	13	23%
	We do not need this software	22	39%
	We need to invest further in this software	22	39%
Customer Relationship Management Software	We already have this software	3	5%
	We do not need this software	19	33%
	We need to invest further in this software	35	61%
Data analysis or presentation software	We already have this software	12	21%
	We do not need this software	13	23%
	We need to invest further in this software	33	58%
Live streaming or online conferencing	We already have this software	17	30%
	We do not need this software	7	12%
	We need to invest further in this software	38	67%
Other	We already have this software	15	26%
	We do not need this software	26	46%
	We need to invest further in this software	19	33%

Note: as multiple selections were available the response rate will not add up to 100%

Question 25 - Can you estimate how much this necessary software would cost?

Response (n)	Total	Average
52	£324,800	£6,767

Collaboration and Shared Spaces

Question 26 - Would you considering collaborating with other arts organisations to share the use of digital equipment and technology?

Response	n	%
Yes	45	79%
Not sure	10	18%
No	2	4%
Total	57	100%

Question 27 - What models do you think would encourage digital collaboration and the sharing of digital technology, skills, and experience? (for example performance space, a creative hub or networks to share use of digital equipment.)

Overview

In response to this question, organisations felt that sharing of experience and skills fostering networking would be an easily short term goal, and that creative HUBs or rental equipment would be possible on the longer term. Respondents felt that key organisations who can develop their digital skills should receive funding, and other organisations can benefit from training, professional services and loan of equipment. It was felt overall that organisations who benefit from digital funding, and build their expertise, should be given the opportunity to share the learning with the sector.

Support for Digital HUBs

In general there was a strong positive response from respondents on the formation of digital hubs. A number of responses stated how it would not be necessary for every organisations to have their own equipment if there were shared facilities where equipment could be used or rented. Responses were also positive that creative HUBs could facilitate sharing of skills, knowledge, and experiences that could benefit users.

The majority of responses that saw the need for a creative HUB envisaged a performance space for hire that would allow for digital/virtual production.

Responses highlighted that it would not be necessary to create a new space, but to support existing, select organisations and provide funding for the provision of facilities that could be booked or hired. It was also raised that high profile venues could have good quality digital technology that could be used to capture performances for a reasonable cost. This could facilitate the digitisation of producing companies work, and potentially allow for online streaming or integration with other emerging technologies.

The use of creative HUBs for training and skills workshops were another use for these spaces; either to accompany use of the equipment or as standalone activities. It was also raised that the facilities to use new digital technology could assist artists in their early careers to access the hardware and software needed and to build a portfolio of work for either artistic development or employment.

Some organisations have already began to move into this space and may be able to provide some of these services with future investment. The importance of having appropriate technician support was noted to ensure that the technology can be utilised effectively.

Sharing / Rental of Equipment

There were a number of opportunities and challenges faced by the potential of shared use of equipment. It was felt that shared equipment could be of a much higher quality than if organisations invested themselves; this is pertinent as some respondents felt that quality of digital production throughout Covid-19 could have been higher. It was also felt that hire of equipment should be subsidised; both to ensure it is affordable but also to ensure funding can go towards the artists and creatives creating the work. It was noted that the organisations administering the equipment should be reputable, and it was suggested that venues hosting other organisations may be ideal candidates.

However, there were concerns about how equipment is treated by users, and whether affordable insurance could be acquired. One respondent noted that while equipment sharing is attractive it is a costly to maintain effective access, another proposing that a full time administrative post be assigned to the equipment to ensure oversight.

Investing in skilled staff / technicians and freelancers

Throughout the survey there has been the debate of whether staff should be upskilled in digital production, or if experienced professionals, either freelancers or production companies, should instead fulfil the role for arts organisations. It is likely that one size does not fit all, and different organisations require a different approach.

For smaller companies, it can be difficult to manage digital production or online streaming at the same time as managing a performance. In these cases these organisations have noted that they outsource the digital production.

One response proposed that equipment investment be made available to freelance specialists to ensure the equipment they have can benefit arts organisations through contract work and service level agreements.

It was also noted that although equipment and software investment is now required, longer term investment was needed in people; specifically skilled digital technicians.

Investing in partnerships

Many responses identified the need for partnership working; some referencing partnerships between commercial and not for profit sectors, some suggesting partnerships with academic institutions, and others between arts organisations. It was suggested that a target could be set for the number of sector partnerships.

For the arts sector to research and develop how it can be translated into the digital space, respondents noted partnerships with agencies supporting digital and screen based technology such as Future Screens NI, The Space and NI Screen. Others noted working with academic facilities such as the Sonic Arts Research Centre in Queens University and the Screen Academy, the up and coming investment in virtual production with the Ulster University.

Funded projects to experiment with new technologies were proposed, and one response noted that short term projects with clear goals would allow participants first hand experiences of the technology being used. Another respondent suggested that sharing of digital marketing resources would be an investment that could be used by both small and large organisations.

Skills and knowledge Sharing

There was a strong message that skills, knowledge and experience sharing would be incredibly valuable for the sector. Whether this is through webinars run via ACNI funding or whether this was peer to peer learning.

It was suggested that an online platform could be created where artists can both share experiences or needs; this platform could identify what skills are available and act to propagate collaboration and partnerships. An alternative suggestion was that a pool of digital professionals could be created that arts organisations could work with. It was also suggested that ACNI annually funded clients list available services and facilities so that potential partners can scope projects.

Any Other Comments

Question 28 - Is there anything else about your digital needs or ambitions that you would like to add?

Online Audience Development

Organisations have been forced over the last year to engage with audiences almost exclusively by digital and online means. Although some organisations do not plan to continue to use this medium, many have noted that it will be needed to phase in live audiences, or that they wish to continue using it either as a standalone element of the programmes or for blended/hybrid events.

Digital has been able to assist in reaching audiences that have not previously been able to engage with the arts, such as due to disability or geographical location, although by the same token some members of society are excluded from digital engagement either due to lack of technology or age. This duality of Digital must be acknowledged.

Respondents acknowledged the necessity to develop and maintain online events audiences, and some felt that organisations should be incentivised to keep up digital online engagement.

There is still the need to ensure that online platforms are interactive and immersive to maintain the interest of the audience and some organisations have the ambition to establish an interactive creative learning space to educate and deliver their arts programmes.

Challenge of Digital

However the digital space is not without challenge, and this ranges from practicalities on online performance to the rights of artists and creatives.

The online space is accessible globally, and while this brings the benefit of a much greater audience, it means that the same content is available from many other channels. The existing geographic model of performance, where artists attract audiences from the surrounding geographic area, does not apply in the online space; can organisations live streamed content compete online when the same artist may have performed on a number of other available channels?

Further, monetisation in digital is difficult as audiences are less willing to pay for online content, and files can be so easily shared. Can organisations make their digital content sustainable and how are artists therefore reimbursed for their work. Equally, venues need support in understanding the rights of performing artists within their spaces for digitised content.

Funding and Support for Digital

Many comments throughout the survey discussed support and funding for digital indirectly, but less directly discussed what initiatives could be created.

One response suggested that it was not necessary to 'invent; new projects as this could both stretch the capacity of arts organisations and undermine the quality of existing work. One suggestion aligns with this, suggesting that if additional funding was available for exhibitions (est. £2k per exhibition) then accompanying digital work could be made of a high standard.

In contrast another respondent was excited about the prospect of digital funding and investment to allow arts organisations to get projects off the ground. Another respondent noted that with the space and team to facilitate a digital HUB estimated that £130k of investment would be needed to acquire all the right equipment.

For digital projects and support the point was made again that funding for digital technicians is vital to ensure that the skills to use hardware and software are available.

Staffing for Digital

There has been the conflicting viewpoints within the survey responses as to whether internal staff should be upskilled, or whether freelance experts should be contracted.

Some respondents wanted training for their staff members; either generic to operate within the digital space or specifically for camera control, video editing, lighting etc. Also discussed was the need for experienced digital arts facilitators to manage a digital room and deliver training and activities. It was also possible that volunteers be digitally trained, depending on how they function within organisations.

For those who recognise the contribution of internal staff it was felt important that specialised team members are retained within organisations.

Other responses welcomed the opportunity to buy in skills rather than reskilling the core team; and if there was a central pool of experienced personnel, as well as equipment, this would be helpful. For respondents with this preference there was the feeling that accessing the people with the right skills was most important, and that funding should allow access to professional suppliers.

Cross artform working and new technology

Some responses acknowledged that it was necessary for the arts to explore the intersection of disciplines, and find creative ways to fuse existing artforms with digital technology. For many this was how the arts could stay relevant by adapting to new technologies as they are being developed.

There was a feeling that the arts needs to be prepared for Extended reality (XR - including virtual reality, augmented reality and mixed reality) and that artists and art organisations need to be experimenting and creating for these platforms before they arrive. To support this, funding and support should not just be for technology and skills; but also the opportunity to experiment, create, and develop services on these new and emerging technologies.

However there was an acknowledgement that technology also needs to be cost effective and easier for audiences to engage with so they can meaningfully take part in experiences.

Returning to normal

Many responses to the survey noted the impact of Covid-19 on how they have delivered their arts programmes, and that there will be some transition between the digital only delivery and a return to live performance. There may be opportunities in this period, including the potential for outdoor events or digital/visual installations that allow the arts to be enjoyed in line with audience needs and social distancing restrictions.

Conclusion

Throughout the survey respondents made the point strongly that the arts need to be enjoyed in-person in a live environment. Covid-19 has forced organisations to digitise their arts programming and they are keen to return to normal. Where some respondents only see digital as a tool others create digital arts, created exclusively for the digital space, and it is important to consider when interpreting these findings.

Respondents have acknowledged that digital support is needed. There is disparity in the skills across the sector and artists and administrators have had to learn skills themselves rather than receive formal training. The message was that skills and training needs to be bespoke to organisations and be more specific than the general digital marketing that has been provided before.

The feedback highlights that the sector does not feel its digital development has been adequately supported, and that this need has been highlighted as a result of the Covid-19 pandemic. It is believed that NI has received less support than other areas of the UK and Europe and that this has had a negative impact on the sectors visibility and capabilities. There was the request that funding must also be broader, including support for software subscription services.

With technological changes, exacerbated by the events of 2020, the arts audience has been changing, and there was an acknowledgement that artists and organisations need to be aware of this and design for the evolving market. Online digital engagement offers great potential in audiences but content is also pitted against significant competition. Online digital engagement is time consuming which poses capacity issues for organisations and there are fears about audiences' expectations.

It was felt that it is crucial that the arts keeps up with technological changes; whether this is with new hardware, software or online digital platforms. This includes having the space to experiment and innovate within these new media. In order to do this it may mean training and skills development specifically for new technologies, but it may also be that existing skill and training is needed; for example in video editing and content creation.

Even if the arts can keep up with technology and the sector is suitably skilled to ensure a high quality of content, monetisation poses a serious challenge for many respondents. Online audiences are harder to convince to pay for content and it was felt that there are limited avenues for monetising digital content. This was illustrated by the finding that less than half of the respondents were able to monetise their content, and findings from ACNI's Covid-19 impact survey[3] that income made was significantly lower than lost revenue income. There were also fears that online and digital art can pose challenges for intellectual property and the normal geographic boundaries for audience catchment do not necessarily apply.

Accessibility of the arts was also a strong theme. Online poses both great opportunity to people from marginalised communities or from geographically distant locations to engage with the arts, but for those without the technology or skills to utilise technology there can be barriers to engagement. Further, for those with a disability or who are unable to leave their house, online remote engagement can allow them access to classes and performances that would otherwise not be possible. It was raised that a digital strategy from ACNI creates the opportunity to promote accessibility of the arts through digital and extend the reach of the arts to a broader spectrum of audience members.

[3] Available on ACNI's website http://artscouncil-ni.org/news/surveys-reveal-true-impact-of-pandemic-on-nis-creative-sector

Appendix 1 – Strengths and Weaknesses of the Research

ACNI's digital ambitions survey was captured to advice policy development on a number of data gaps. Notably the use of digital within the NI arts sector and how the sector intends to use digital in the future. The survey methodology and scale or research presents a number of strength and weaknesses, which should be considered when using this report.

Weaknesses

The survey was convenience sampling through a publicised online survey; meaning that it was not possible to ensure the sample was representative of artforms, geographical location, or organisation scale.

The survey had a relatively low level of response (n=57) meaning that the findings cannot be representative of the sector as a whole, and the responses are too small to break down the findings by organisation types, artforms, or geographical location.

It is very likely that some key organisations have not been able to contribute to this piece of research.

Strengths

Data has been collected that is not currently available, which can provide insight into digital within the arts and creative sector, but also be compared with other key findings across the UK; notably ACE and NESTAs Digital Culture longitudinal research.

Cross referencing with this larger piece of research can allow us to contextualise findings and make informed decisions about the similarities and differences of our sectors. This will provide insight into when policy design can follow, or diverge, from those tested in other regions.

Although the number of survey responses are low, significant rich qualitative information has been provided by the survey and analysed to identify common themes; which can be used to build a picture of the sectors challenges, opportunities, and ambitions.

How ACNI will use this report

This piece of research lays the foundation of future research and digital policy design by ACNI; as the themes identified can be used to inform further data collection and prepare the drafting of policies for further testing within the sector.

Consistent themes can be fed into the design of grant funding; to target specific challenges or opportunities within the arts and creative sector.

Appendix 2 – Consent and Introductory Questions

Question 1 - Would you be happy for anonymised comments to be published on the ACNI website and used in reports, in line with ACNI's privacy policy?

	n	%
Yes	54	95
No	3	5
Total	57	100

For the purposes of this survey, all comments were analysed, however no direct quotes have been used; only an overview of the findings.

Question 2 - Would you like to be notified when survey findings are publicly available?

	n	%
Yes	52	91
No	5	9
Total	57	100

Question 3 - What is your name?

There were 56 responses to this question.

Question 4 - What is your email address?

There were 56 responses to this question.

Question 5 - What is your organisation?

There were 54 responses to this question.

Question 6 - Have you received funding from ACNI before? - Previous funding

	n	**%**
Yes	50	88
No	7	12
Total	57	100

Appendix 3 – Survey Questionnaire

ACNI Digital Survey

Overview

The Arts Council of Northern Ireland (ACNI) is the development and funding agency for the Arts in Northern Ireland. We distribute public money and National Lottery funds to develop and deliver a wide variety of arts projects, events and initiatives across Northern Ireland.

The Arts Council has developed this survey for arts organisations to determine which key digital skills and technologies are currently used by the Northern Ireland arts sector and which key digital areas the sector has ambitions to develop. We also seek opinions on what digital knowledge, skills, and equipment would be of benefit to meet the sector's future ambitions.

For this survey, digital in its broad sense is considered to be using online or offline screen based technology to create, record, or distribute the artistic content that the creative sector makes. For example capturing a live performance, or online audience development.

The information gathered by this survey will inform the development of ACNI's first digital strategy.

Privacy Note

All of the information you provide will be treated confidentially and in accordance will GDPR guidelines.

ACNI will hold personal data in line with their privacy statement: **http://www.artscouncil-ni.org/site/page/privacy** *<http://www.artscouncil-ni.org/site/page/privacy>* .

Anonymised comments may be published our website with your consent.

This survey should take 10 minutes.

Why we are consulting

The impact of Covid-19 across the creative sector has been dramatic, and restrictions have all but stopped audience attendance in person. Although a great majority of the arts sector has been able to make digital content available for their audiences, it has not been possible to replace attendance of the arts or make up for lost income.

Arts audiences have been interested in attending or participating with the arts online; with Thrive's After the Interval – Act 2 research showing that 8 in 10 respondents interested in engaging with cultural events online. What these audience responses showed was that while online events will be different and still a satisfying experience, they won't be as good as live events. However this study also found that 66% of audiences would be willing to pay for a cultural event online, although most would be willing to pay less than a ticket for a similar event in a venue.

The general public have been engaging in the arts through Covid-19 lockdowns and restrictions; such as viewing arts performances online, social media livestreams, and taking classes online. While this cannot replace live arts, this year has forced innovation in the use of digital technology and distribution; and may influence how audiences are engaged in the future and how the arts and creative sector may use digital technology to deliver their programmes in the future.

Consent

1 Would you be happy for anonymised comments to be published on the ACNI website and used in reports, in line with ACNI's privacy policy?

(Required)

Please select only one item

◯ Yes ◯ No

ACNI's Privacy Policy

http://www.artscouncil-ni.org/site/page/privacy *<http://www.artscouncil-ni.org/site/page/privacy>*

2 Would you like to be notified when survey findings are publicly available?

(Required)

Please select only one item

◯ Yes ◯ No

Introduction

3 What is your name?

Name

4 What is your email address?

If you enter your email address then you will automatically receive an acknowledgement email when you submit your response.

Email

5 What is your organisation?

Organisation

6 Have you received funding from ACNI before?

(Required)

Please select only one item

◯ Yes ◯ No

Use of Online and Digital

7 Do you have any general thoughts or do you feel there are any key issues on the use of digital technology and digital engagement in the arts?

8 How would you describe your use of the following areas of digital?

(Required)	I already use this	I require additional skills and training	I have ambitions to use this	I do not use or have plans to use this
Website *Please select only one item*				
Maintain a blog / vlog *Please select only one item*				
Selling tickets online *Please select only one item*				
Search Engine Optimisation *Please select only one item*				
Customer relations management *Please select only one item*				
Online donations *Please select only one item*				
Email marketing *Please select only one item*				
Social Media *Please select only one item*				
Live streaming *Please select only one item*				
Webinars *Please select only one item*				
Sharing existing recordings or archive material/exhibits available for digital consumption *Please select only one item*				
Making digital audio/video available for download or streaming *Please select only one item*				

(Required)	I already use this	I require additional skills and training	I have ambitions to use this	I do not use or have plans to use this
Providing educational content or online events for schools and other audiences *Please select only one item*	◯	◯	◯	◯
Paid search and /or online display advertising *Please select only one item*	◯	◯	◯	◯
Data analysis *Please select only one item*	◯	◯	◯	◯
Creating digital arts or cultural work (e.g. performances, music, animation etc.) *Please select only one item*	◯	◯	◯	◯
Other (please specify) *Please select only one item*	◯	◯	◯	◯

If 'other' please specify:

9 How many of the staff within your organisation play an active role in carrying out and developing your digital activities?

(Required)

Please select only one item

◯ No staff have a digital remit ◯ 1-25% ◯ 26-50% ◯ 51-75%
◯ 76% or more

Any other you can provide about information about staff capacity for digital activities, dedicated digital officers, or integration of digital within your organisation can be included here:

10 In the future, which of these areas of your creative programme can digital technology best assist you?

(Required)

Please select all that apply

☐ Translate existing or new content into a digital / online format
☐ Improve the quality of content creation ☐ More widely distribute your creative content
☐ Provide an additional source of revenue
☐ Create business efficiencies and make your programme easier to manage
☐ Improve the quality of the services you provide to clients / customers
☐ Create content specifically for an immersive format ☐ None of the above ☐ Other

If 'other' please specify:

Training and Support

11 What kinds of support would you benefit from?
(Required)

Please select all that apply

- [ ] Information sessions
- [ ] Skills and training
- [ ] Formal Qualifications
- [ ] Mentoring and direct support
- [ ] Partnership grant projects
- [ ] None of the above
- [ ] Other

If 'other' please specify:

12 What knowledge and skills would you most benefit from?
(Required)

Please select all that apply

- [ ] Data Analytics
- [ ] Website development / maintenance
- [ ] Digital marketing and strategy
- [ ] Social media
- [ ] Box office and Customer Relationship Management
- [ ] Email marketing
- [ ] Search Engine Optimization
- [ ] Online advertising (including Display ads, Social Media ads, Video ads and Search Engine Marketing)
- [ ] eCommerce and merchandising
- [ ] Video and visual content
- [ ] Immersive / emerging technology
- [ ] None of the above
- [ ] Other

If 'other' please specify:

Impact of Covid-19

13 Did you create digital content before Covid-19 lockdown in March 2020?
(Required)

Please select only one item

- ( ) Yes
- ( ) No

14 Have you created digital content since Covid-19 lockdown in March 2020?

(Required)

Please select only one item

◯ Yes ◯ No

15 Has your digital content creation increased since Covid-19 lockdown in March 2020?

(Required)

Please select only one item

◯ I have not produced digital content ◯ Decrease in content ◯ Content the same
◯ Increase in digital content ◯ Greatly increased digital content.

16 Have you been able to directly engage with your audience digitally through Covid-19?

(Required)

Please select all that apply

☐ I have not been able to engage directly with my audiences digitally
☐ Live streamed content on social media
☐ Using online conferencing software, such as Zoom
☐ Online chats / real time commenting ☐ Other

If 'other' please specify:

If you have been able to engage with your audience digitally, how successful do you feel this has been?

Please select only one item

◯ Very Unsuccessful ◯ Unsuccessful ◯ Neither Successful nor Unsuccessful
◯ Successful ◯ Very Successful ◯ I have not engaged with my audiences digitally

Monetising Digital

17 Have you been able to monetise any of your digital content?
(Required)

Please select only one item

◯ Yes ◯ No

18 If you haven't been able to monetise your online content, would you want to find ways to monetise it?
(Required)

Please select only one item

◯ Yes ◯ No ◯ I have been able to monetise digital content

19 Which of these methods of monetisation would you consider?

(Required)	Used successfully	Tested unsuccessfully	Keen to try	Will not consider
Membership system *Please select only one item*	◯	◯	◯	◯
Paid entry to digital content *Please select only one item*	◯	◯	◯	◯
Online ads / commercial *Please select only one item*	◯	◯	◯	◯
Online sponsorship / donation *Please select only one item*	◯	◯	◯	◯
eCommerce / online sales *Please select only one item*	◯	◯	◯	◯
Paid content for streaming / online distribution *Please select only one item*	◯	◯	◯	◯
Other (please specify) *Please select only one item*	◯	◯	◯	◯

If 'other' please specify:

20 What are the barriers to monetising your content?
(Required)

Please select all that apply

- [ ] Monetising online content is not within the mission of the organisation
- [ ] I do not have the skills / expertise to monetise my online content
- [ ] I do not believe there is a market for my product online
- [ ] We do not have the staff capacity/time to monetise our content
- [ ] We do not have the equipment to digitise and monetise our equipment
- [ ] No barriers to monetisation
- [ ] Other

If 'other' please specify:

Digital Equipment Needs

21 What digital equipment do you currently use for your core creative programme?
(Required)

22 What digital equipment do you require for your future programming? (please tick all relevant boxes)

(Required)	We already have this equipment	We don't need this equipment	We need to invest further in this equipment
Computers	☐	☐	☐
Tablets or iPads etc.	☐	☐	☐
Cameras or video cameras	☐	☐	☐
Microphones	☐	☐	☐
Interfaces for recording or streaming	☐	☐	☐
Display equipment	☐	☐	☐
Lighting equipment	☐	☐	☐
Other	☐	☐	☐

If 'other' please specify:

23 Can you estimate how much you would need to invest in digital equipment for future programming?

24 What digital software do you require for your future programming? (please tick all relevant boxes)

(Required)	We already have this software	We do not need this software	We need to invest further in this software
Content creation software (etc. image, audio or video editing)	☐	☐	☐
Online ticket sales software or subscriptions	☐	☐	☐
Customer Relationship Management Software	☐	☐	☐
Data analysis or presentation software	☐	☐	☐
Live streaming or online conferencing	☐	☐	☐
Other	☐	☐	☐

If 'other' please specify:

25 Can you estimate how much this necessary software would cost?

26 Would you considering collaborating with other arts organisations to share the use of digital equipment and technology?

(Required)

Please select only one item

○ Yes ○ Not sure ○ No

27 What models do you think would encourage digital collaboration and the sharing of digital technology, skills, and experience? (for example performance space, a creative hub or networks to share use of digital equipment.)

Any additional comments

28 Is there anything else about your digital needs or ambitions that you would like to add?

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