



VOICES OF CULTURE

Structured Dialogue between the European Commission and the cultural sector

2021-2022 – Call

(RE)-ENGAGING DIGITAL AUDIENCES IN THE CULTURAL SECTORS - IMPROVING AUDIENCE DATA

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I. INTRODUCTION – PURPOSE OF THE CALL

With the advent of digital technology, developing digital audiences has become a new challenge for the cultural and creative sectors (CCS). More complex than just increasing the number of cyber-attendees, this process needs to be accompanied by a long-term meaningful digital strategy, supported by clearly defined objectives, audience data, and performance indicators. In line with the 2019-2022 Council Work Plan for Culture,¹ digital technologies therefore represent a major asset for innovative methods of participation and user-centered services.

The purpose of the present call is to engage with experts on the topic of understanding digital audiences, with a special focus on performing arts (i.e., theatre, dance, live music), and cultural heritage (i.e., museums, galleries, historic buildings, heritage sites, intangible heritage events and activities). In light of COVID-19, discussions should focus particularly on lessons learned from lockdown-induced practices to understand existing digital audiences and engage new ones, as well as to collect and manage digital audience data.

¹ See: 2019-2022 Council Work Plan for Culture, [https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52018XG1221\(01\)](https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52018XG1221(01)). This call also relates to the Digital Europe Program and Europe's Digital Decade (2021-2027). See <https://digital-strategy.ec.europa.eu/en/activities/digital-programme>

The target output is the development of voluntary guidelines for collecting and managing data on existing and new digital audiences. These guidelines could serve as a source of inspiration for cultural organisations and help them adapt to the ever-changing digital environment.

II. BACKGROUND - KEY CHALLENGES

Audience development via digital means

The digital transformation of the CCS is an important underlying topic for cultural cooperation at the EU level, as set out in the European Agendas for Culture² and the Work Plans for Culture. Digital tools such as social media, online platforms, streaming services, algorithms, digital devices, online collections, video games (including serious games, mobile applications, and virtual and augmented reality) are being increasingly used to enhance cultural experience. These technologies help to promote culture, make heritage dynamic through immersive and interactive experiences, facilitate access to and the understanding of contents, foster co-creation, and provide more personalised and inclusive services. Most of them are now acknowledged to have altered the supply and demand for cultural goods and services and led to alternative modes of production, co-creation, promotion, and consumption. Most importantly, they have encouraged cultural organisations to rethink their business models to continue achieving their social missions. They have also been crucial for individual artists and creative professionals who have been adapting their practices with technical progress in mind.

Yet, managing and developing digital audiences still represents considerable challenges for both cultural organisations and cultural policies.³ “Digital audience management” is the process of collecting, managing, analysing, and using consumer data to offer a more user-centered approach. The main goal is to efficiently reach and retain consumers, and to foster their engagement in digital culture by providing more targeted services. Digital audiences also encompass different profiles of people, including the general public, direct users, cultural stakeholders, and researchers. Just as general audiences, digital consumers belong to different generations and ethnicities as well as educational and cultural backgrounds, physical conditions, and lifestyles. As

² See: The New European Agenda for Culture (2018), <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52018DC0267&from=EN>

³ Audience development is defined as “a planned, organisation-wide approach to extending the range and nature of relationships with the public by focusing on their needs” and whose primary goal is to “help a cultural organisation to achieve its social purpose, financial sustainability and creative ambitions.” The Audience Agency (2016). Report available on <https://www.theaudienceagency.org/insight/guide-to-audience-development-Planning>. See also S. Hadley (2021). *Audience Development and Cultural Policy*. London: Palgrave MacMillan (<https://www.palgrave.com/gp/book/9783030629694>).

a result, they perceive and use digital technologies differently, but also have their own needs and expectations regarding online culture. The risk of perpetuating inequalities through digital means is therefore real, just as digital audiences are not exempt from the traditional hurdles (i.e., time, price, and supply availability) that prevent people from engaging in cultural activities.

Aware of these challenges, the European Commission coordinated several experts' work in the framework of the *2015-2018 Council Work Plan for Culture*.⁴ In 2015, *Voices of Culture* (VoC) published a first brainstorming report on audience development via digital means,⁵ which was rapidly followed by those of the *Open Method of Coordination group of Member States on promoting access to culture via digital means. Policies and strategies for audience development* (2016)⁶ and the *Council's conclusions on promoting access to culture via digital means with a focus on audience development* (2017/C 425/03).⁷ These EU level initiatives have highlighted the benefits of digital technologies for audience development, by offering practitioners, researchers, and policymakers a forum for discussion and exchanges of good practices. They have also pinpointed several shortcomings that prevent organisations from fully embracing the potential of the digital age. The main limitations reported by these European-led meetings were:

- The unequal status of cultural organisations regarding new technologies, depending upon their size and area of specialisation (some cultural goods and services being better suited for online consumption);
- A lack of reaction towards the digital turn, especially among local and smaller cultural organisations;
- Insufficient digital and data management skills among staff members, especially in relation to gathering and processing audience data;
- A lack of financial resources to keep up with a constantly changing digital environment;
- A lack of flexibility of funding opportunities, often not taking stock of additional resources needed to carry out projects using cutting-edge technologies;
- Privacy and regulation issues when dealing with audience data;

⁴ See: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52014XG1223%2802%29>

⁵ Voices of Culture. Structured Dialogue between the European Commission and the cultural sector. *Accessible and Inclusive Culture—Promoting access to culture via digital means: policies and strategies for audience development*. Report available on <https://voicesofculture.eu/2019/05/16/audience-development-via-digital-means-2/>

⁶ Working Group of Member States experts under the Open Method of Coordination, *Promoting access to culture via digital means Policies and strategies for audience development: work plan for culture 2015-2018*. Report available on <https://op.europa.eu/en/publication-detail/-/publication/7839cb98-651d-11e7-b2f2-01aa75ed71a1/language-en>;

⁷ Council conclusions on promoting access to culture via digital means with a focus on audience development. Report available on <https://op.europa.eu/en/publication-detail/-/publication/c05689d3-df1a-11e7-9749-01aa75ed71a1/language-en/format-PDF>. Other European initiatives on media and digital culture are also available on <https://digital-strategy.ec.europa.eu/en/policies/media-and-digital-culture>.

- The difficulty of defining common guidelines on how to develop a sustainable digital strategy, due to the heterogeneity of the CCS;
- Insufficient support by local, national, and international governments to help cultural organisations develop a digital vision.

Based on these observations, the Council of the EU formulated several recommendations that invited cultural operators to know their audiences better, promote the interoperability of content and technology, foster data collection, management and sharing, and use this data to provide more meaningful and interactive services.

COVID-19 and the radical digital turn

The COVID-19 crisis has been an exceptional accelerator in the digital turn, forcing all cultural organisations to go fully digital to execute their missions. During strict lockdown, consuming culture online via social media (e.g., Facebook, Instagram, TikTok, Twitter, Youtube), websites, mobile apps, and virtual conference platforms was the only available option. Survey data collected throughout the pandemic has revealed a higher rate of participation among new digital consumers, the role of online cultural content in well-being, the complementarity between offline and online culture, the probability of new online behaviours to last over time, but also the need for consumers to come back to on-site culture.⁸ Another consequence of this radical digital turn is the growing number of new audience data now accessible to cultural organisations. This data stream can be used to better understand digital audiences' profiles and willingness to engage in digital culture, but also to learn more about hard-to-reach groups as recommended by the 2019-2022 Council Work Plan for Culture.⁹

The digital solutions developed by the CCS throughout the crisis and the recovery process therefore offer **a unique opportunity to renew the reflection on digital audience management**. This is all the more necessary since, at the time of this new VoC call, not all cultural organisations have returned to normal levels of activity. With the development of new variants, the sanitary situation remains uncertain. Socially

⁸ See for example <https://www.theaudienceagency.org/evidence/digital-audience-survey-findings>; <https://www.theaudienceagency.org/evidence/covid-19-cultural-participation-monitor/digital-hybridity>; <https://australiacouncil.gov.au/news/media-releases/culture-at-our-fingertips-new-research-on-digital-arts-engagement/>; <https://www.rmit.edu.au/content/dam/rmit/au/en/research/ecps/design-creative-practice-dcp/rmit-dcp-digital-engagement-preliminary-report-post-covid.pdf>; <https://www.artsmanagement.net/Articles/The-Pandemic-as-a-Factor-of-Transformation-in-Arts-and-Culture-The-Ascendance-of-Digital-Culture,4174>

⁹ In the 2019-2022 Council Work Plan for Culture, EU Members recognize that: “Changing user behaviour due to digitalisation, ageing and culturally diverse societies call for a better understanding of different audiences. A stronger orientation towards the interests and needs of specific groups, such as young people, older people, people with disabilities, people with a migrant background and people living in poverty or material deprivation, is necessary.”

efficient and sustainable digital strategies are needed for the CCS to (re)-engage with their existing and new digital audiences, adjust supply accordingly, and anticipate future consumption patterns.

III. AREAS OF DISCUSSION - KEY QUESTIONS

Against this backdrop, the Brainstorming meeting is framed around three main areas of discussion:

- A. COVID-19 recovery and impact on cultural consumption by digital means
- B. EU role in supporting the development of digital audiences
- C. Aspects of data collection and management with regard to 1) rebuilding existing audiences via digital means, and 2) reaching new digital audiences, with a focus on digitally deprived people

Each topic is introduced and followed by a selection of questions.

A. COVID-19 recovery and impact on cultural consumption by digital means

Digital technologies have played a crucial role throughout the pandemic by allowing consumers to access the arts and culture remotely. More than ever, cultural organisations have become aware of the importance of knowing their digital audiences. Yet, all were not equally skilled and equipped in the rush to move fully online, providing digital services of varying quality and frequency.¹⁰ COVID-19 has therefore accentuated a digital divide that can no longer be denied by cultural decision-makers. After months of virtual consumption, the reopening of on-site culture is also likely to affect the frequency and ways digital technologies are used. The shifts in audience profiles and consumption behaviours that cultural organisations are currently facing will therefore be the main focus of the discussion, as well as the impact of this new supply and demand equilibrium on decision-making and cultural policies. Experts are invited to take into account socio-economic and political parameters and to provide insights from both the for-profit and non-profit CCS.

¹⁰ See for example A.-S. Radermecker (2021). Art and Culture in COVID-19 era. For A Consumer-Oriented Approach. *SN Business & Economics* 1(1): 1–14 (<https://doi.org/10.1007/s43546-020-00003-y>); D. Betzler, E. Loots, M. Prokúpek, L. Marques, & P. Grafenauer, P. (2020). COVID-19 and the Arts and Cultural sectors: Investigating Countries' Contextual Factors and Early Policy Measures. *International Journal of Cultural Policy* (<https://doi.org/10.1080/10286632.2020.1842383>)

Key question 1:

Could you please describe any lessons learned and challenges experienced in engaging digital audiences during COVID-19, particularly with regard to collecting, managing and using audience data, while respecting data protection legislation?

Auxiliary questions:

- Which public policies/actions/interventions (at international, EU, national, regional and/or local levels) have been launched since the pandemic outbreak to assist cultural organisations in enhancing online services and developing a sustainable digital and data-based vision?
- Has the pandemic marked the beginning of the era of “phygital culture”,¹¹ and if so, what are the new challenges it brings for audience management and cultural policies?

B. EU role in supporting the management of digital audiences

Digital audience management is known for being particularly costly and time-consuming for cultural organisations. If some of these organisations have developed in-house strategies to get to know their audiences better and develop a more user-centric approach, others do not possess the means, knowledge, and technical skills to embark on this challenging work. With the progressive reopening of on-site culture, the priorities of cultural managers may also change with the risk of overlooking digital audiences. In this context, the EU can play a role in assisting the CCS in dealing with these new audience challenges. This discussion area aims to share experiences and best practices in order to develop EU voluntary guidelines on managing digital audiences. The goal is to allow cultural organisations to continue focusing on their core missions and daily activities (both offline and online), while benefiting from effective digital audience management. A reflection on how to spread new EU guidelines successfully (to make them available to the greatest number), but also on how to facilitate their implementation and assess their main outputs needs to be carried out. The geographic location and scope of activities of the CCS under review are two other parameters to be considered in the discussion.

¹¹ Phygital can be defined as “the deep and complex intertwining of online and offline experiences, sketching the contours of what can become a phygital society.” See J.G. Andrade & P. Dias. A phygital Approach to Cultural Heritage. Augmented Reality at Regaleira. *Virtual Archaeology Review* 11(22): 15-25, 2020. DOI: [10.4995/VAR.2020.11663](https://doi.org/10.4995/VAR.2020.11663)

Key question 2:**What would be the added-value of developing new voluntary guidelines at EU level on collecting and managing digital audience data?**

Auxiliary questions:

- Please share details of existing guidelines and good practices in your organisation/ sector with regard to (re)building audiences, engaging new audiences and collecting and managing audience data in the digital environment.
- What more do you believe could usefully be done at a) EU and b) Member States' level to support performing arts, including live music, and heritage organisations in digital audience development?

C. Aspects of data collection and management with regard to 1) rebuilding existing audiences via digital mean, and 2) reaching new digital audiences, including a focus on digitally deprived

Surveys and reports on digital audiences usually say little about how concretely cultural organisations deal with consumer data.¹² Accurate data collection and management have direct implications, however, for social cohesion and well-being; these are two priorities of the 2019-2022 Council Work Plan for Culture. Better understanding consumption patterns of existing and new digital audiences allow cultural managers to better meet their needs and expectations, encourage experience renewal, and build durable relationships. It also helps identify new categories of non-users and develop innovative strategies to overcome existing divides within the CCS (e.g., digital, generational, social, material). Yet, effective data collection and management inevitably go hand in hand with a long-term strategic vision on digital audience development, based on the definition of SMART objectives (i.e., specific, measurable, achievable, relevant, time bound) and performance indicators. Using adequate digital tools to reach the targeted groups and avoid data issues (e.g., data inaccuracy, data redundancy, data silo) or bad decision making is also essential. In this discussion area, experts will use their own pre- and post-covid-19 experiences to detect new digital-driven shifts in consumption habits, identify hard-to-reach groups (especially digitally deprived people), and propose socially efficient digital solutions. Special attention will be paid to how cultural organisations set their objectives and

¹² The UK is an exception with the publication of a Digital Policy and Plan Guidelines in 2016. Report available on https://www.artscouncil.org.uk/sites/default/files/download-file/Digital_Policy_Plan_guidelines.pdf

performance indicators regarding digital audience development and data management, and how they avoid confusing this process with pure marketing.¹³ Experts will also identify concrete means to translate the outputs of data analysis into convincing arguments for public funding at the local, national, and EU levels.

Key question 3:

How cultural organisations set their objectives and performance indicators regarding digital audience development and data management?

Auxiliary questions related to rebuilding existing audiences by digital means:

- What concrete data on digital audience (personal, behavioral, engagement, attitudinal data) should cultural organisations consider to supply more user-centric services, and how to collect and process this data in a meaningful manner?
- Using pre-crisis and post-crisis audience data, is it possible to define a “physical,” “phygital,” or “digital-only” profile on consumers and to detect new cultural consumption behaviours among existing audiences? Can we use these profiles and new patterns to justify innovative forms of public funding?

Auxiliary questions related to reaching new digital audiences:

- What are the pros and cons of the online tools (e.g., software, platforms, apps) currently used by cultural organisations to approach and retain new digital audiences (e.g., Google Analytics)?
- How can we gather data on hard-to-reach groups (e.g., digitally deprived people, the elderly, those with disabilities, socially and geographically isolated people, etc.) in a non-discriminatory, accessible, and respectful manner to adjust digital cultural services (e.g., via new forms of online partnership with specialised institutions)?

¹³ Recent research has pointed out this issue. See for example V. M. Ateca-Amestoy, V., Ginsburgh, I., Mazza, J., O’Hagan, & J., Prieto-Rodriguez (Eds.) (2017), *Enhancing participation in the arts in the EU*. Cham: Springer (<https://www.springer.com/gp/book/9783319090955>); M. Massi, M. Vecco, & Y. Lin (2021). *Digital Transformation in the Cultural and Creative Industries. Production, Consumption, and Entrepreneurship in the Digital and Sharing Economy*. London/New York. Routledge (<https://www.routledge.com/Digital-Transformation-in-the-Cultural-and-Creative-Industries-Production/Massi-Vecco-Lin/p/book/9780367351151>); Hadley (2021), *op. cit.*