Arts Organizations and Digital Technologies

Cultural organizations like theater companies, orchestras, and art museums are using the internet, social media, and mobile apps to draw in and engage audiences, provide deeper context around art, and disseminate their work beyond the stage and the gallery

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Summary of Findings

The internet and social media are integral to the arts in America. A survey of arts organizations that have received grants from the National Endowment for the Arts (NEA) finds that technology use permeates these organizations, their marketing and education efforts, and even their performance offerings. Moreover, many organizations are using the internet and social media to expand the number of online performances and exhibits, grow their audience, sell tickets, and raise funds online, while allowing patrons to share content, leave comments, and even post their own content on organizations' sites.

The internet and digital technologies have also disrupted much of the traditional art world, according to these organizations. It has changed audience expectations, put more pressure on arts groups to participate actively in social media and, in some circumstances, undercut organizations' missions and revenue streams. Even the notion of art is changing: 77% of respondents strongly agree or somewhat agree with the statement that digital technologies have "played a major role in broadening the boundaries of what is considered art."

Tied to this embrace of technology is a widespread sense among arts group leaders that digital technologies are critical to the spread of the arts:[1]

- 81% of the organizations in this survey say the internet and digital technologies are "very important" for promoting the arts
- 78% say these technologies are "very important" for increasing audience engagement
- 50% "strongly agree" with the statement that the internet "has increased engagement in the arts by providing a public platform through which more people can share their work"
- 65% say digital technologies are "very important" for fundraising
- A majority of these organizations also agree that the internet is "very important" in increasing organizational efficiency (63%), and for their engaging in arts advocacy (55%).

Most of the participating organizations strongly or somewhat agree with the statements that technology and social media have made art a more participatory experience (92%), and that they have helped make art audiences more diverse (83%).

Yet the majority of these arts organization respondents also say that technology contributes to an expectation that "all digital content should be free": 74% agree with that statement. Survey respondents are divided over whether technology has negatively impacted audiences' attention spans for live performance, but they uniformly disagree that it has "diluted the arts" by opening new pathways to arts participation and arts criticism.

Some 1,244 arts organizations that have received funds from the National Endowment for the Arts (NEA) between 2006 and 2011 participated in an online survey by the Pew Research Center's Internet & American Life Project. The online survey was conducted from May 30 to July 20, 2012 among a diverse sample including respondents from visual arts, music, theater, dance, literature,

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[1] Not every respondent answered every question. Thus, the results cited here and throughout the report are based only on those who answered a particular question.

photography, and media arts. The largest representations of organizations in the survey are performing arts group and arts service organizations. This national, non-probability sample included arts organizations of all sizes, and represents a wide array of organizational functions, such as performance, curation, exhibition, education, and philanthropy.

Among the key findings:

Technology use is pervasive in arts organizations

Arts organizations today have dozens of internet and mobile technology tools at their disposal; tools that can be used to create awareness of their organization, promote events and exhibits, provide customized experiences for patrons, sell tickets or merchandise, streamline customer service needs, and expand their mission-driven work. But there are costs associated with the embrace of technology, even in instances where the internet-based tools are free; there are issues of staff capacity and training, and there are challenges connected to serving patron bases with varying tastes for tech-mediated experiences of art. Without hesitation, though, arts organizations are plunging into the world of digital technology.

- 99% of arts organizations in this survey have their own website
- 97% have a social media presence on Facebook, Twitter, YouTube, Flickr or other platform. In addition, 69% have individual employees who post to their own social media profiles in their capacity as a representative of the organization. Some 45% of the organizations with a social media presence say they post updates daily, including 25% who post updates several times a day
- 94% of these organizations post photos about the organization or its work
- 86% accept donations online
- 72% sell tickets online
- 50% maintain a blog
- 47% sell merchandise online
- 34% make information about their organization available through RSS feeds
- 31% offer discounts through online services such as Groupon or Living Social
- 27% host podcasts
- 22% host webinars or educational or instructional content

Social media allow new forms of audience participation in the arts

There is a broad consensus among these arts organizations around the value of social media. Some 58% of respondents say the phrase "social media is worth the time our organization spends on it" is "very true," while another 33% thought it is "somewhat true." There is also strong support for the notion that social media helps organizations reach new, broader audiences, and that it helps audiences feel more invested in arts organizations.

- 90% of the arts groups in this survey allow patrons to share their content via email, Facebook, or Twitter
- 82% use social media to engage with audience members before, during, and after events

- 77% of these organizations also use social networks as a barometer <u>to monitor what patrons and the public are saying about their organizations</u>
- 65% use <u>social networks to learn more about their patrons</u> through more direct communications, as well as online surveys and polls
- 52% use <u>social media to crowdsource an idea</u>, from possible programming decisions to the best times for sessions or seminars
- 35% of these groups <u>use location services</u> such as Yelp, Google Latitude or Foursquare to interact with patrons
- 28% <u>host discussion groups</u> or threaded conversations

Asked to recount any major impacts that social media has had on their work, several themes emerged:

- Social media helps organizations clarify what they do, and better describe how audiences can engage with their mission-driven work
- It also helps organizations communicate with alumni, patrons and audiences
- It also makes it possible for patrons to engage with *each other*, and for messages to spread virally

These respondents also described both positive and negative outcomes from their social media use. On the positive side, the most common responses related to:

- Increased attendance at events
- More ticket sales
- Increased public awareness of the organization
- An ability to support fundraising efforts

On the negative side, a handful of organizations mentioned issues such as the time and effort of maintaining internet tools. But the most common negative outcome for respondents is <u>unfiltered public criticism of the organization</u>. Platforms like Facebook, Twitter, and Yelp give the public easy opportunities to air grievances, disagree with programming decisions, or complain about customer service issues. For the most part, organizations say they are able to cope with the new visibility, and have turned criticism into an opportunity to learn, engage, and improve their services.

Mobile apps find a place

Mobile connectivity is beginning to drive some activity in arts organizations. Some 24% of these respondents say they use apps to provide content to the public; 17% say they use apps to facilitate work in their own organization; 15% use apps to sell tickets or services; 5% use apps to train and educate employees.

Technology expands access to the arts

Presenting and hosting events is a core function of many arts organizations. Indeed, 94% of survey respondents say that they host or sponsor in-person events or exhibits. And 29% say they host online events, such as webinars, virtual performances, or virtual exhibits.

Survey participants were asked if their organization had expanded the number of online events or exhibits it hosted in recent years. Some 86% of those who responded say they had. Moreover:

- 81% of these organizations currently post or stream videos of their performances or exhibits
- 15% present online exhibits

New challenges: getting tech funding and bringing staff up to speed

Survey respondents were also asked to describe the greatest challenge for their organizations in adopting these kinds of digital technologies. The majority who answered this open-ended question cited such things as "cost and staffing issues," "capacity/funding" or "time and staff resources." One organization summed up the challenges associated with staff capacity and simply keeping up with the velocity of change:

> Staff time, plain and simple. We have been very lucky to have supportive, encouraging, and inspired leadership and experimental, smart, and creative staff. We have been careful and judicious in prioritizing which digital technologies should be pursued based on our mission and content. Without resources to add staff, digital projects have been integrated with existing workflows. We're all doing our best to do more with less. Staying on top of (and sifting through) the rapidly changing field of digital technologies also remains an ongoing challenge.

Half of the organizations in this survey (49%) have sought funding to support projects that expand their use of the internet or other technologies, such as apps and social media. But, many have found it difficult to secure funds for these projects through traditional means. When asked in an open-ended question whether it is easy or difficult to obtain funding for technology-related initiatives, one respondent wrote:

> Difficult. The amounts are small, and the process cumbersome and slow. Often, by the time grants are awarded (6-12 months post application period) the market has shifted and the original idea needs to be modified or scrapped. This requires entrepreneurial approaches that many funders aren't comfortable with, i.e. rapid pivots and radical changes in strategy.

Other key findings about the impact of technology on the arts world

The arts groups in this survey were asked a battery of questions about some additional impacts of digital technologies:

- 63% say digital technology is "very important" for helping them use their organization's resources more efficiently

- 33% say digital technology is "very important" for <u>providing arts education</u> to the public
- 28% say digital technology is "very important" for <u>enabling artistic creation and collaboration</u>
- 27% say digital technology is "very important" <u>for improving arts cataloging and collections management</u>

When it comes to potential negative impacts of technology, the most significant concern expressed by these groups is that they sometimes struggle to find the resources to make social media work for them: 74% of these organizations say it is "very true" or "somewhat true" that they do not have the staff or resources to use social media effectively.

There were other concerns, too:

- 40% agree with the statement that digital technology is "<u>negatively impacting audience members' attention spans for live performances</u>," including just 9% who strongly agree this is the case
- 22% strongly or somewhat agree with the statement that digital technologies are "<u>hurting arts organizations by decreasing attendance at in-person events</u>."
- 10% strongly or somewhat agree with the statement that "the internet and digital technologies are <u>diluting the arts by giving everyone interested in the arts and arts criticism a public platform</u>"

One other impact is cited prominently by many of these organizations: 37% of respondents strongly agree (and another 34% somewhat agree) that "<u>digital distractions such as ringing cell phones and audience member texting are a significant disruption to live performances</u>."

In an environment filled with ever-more dazzling tools and apps, on-demand content, and instant sharing, arts organizations also state their concerns about increased audience expectations …

> The audience has already moved from "arts attendance as an event" to "arts attendance as an experience." This desire for a full-range of positive experience from ticket purchase, to travel, to parking, to treatment at the space, to quality of performance, to exit – this will only increase over the next 10 years.

… and having the financial capacity to serve audiences:

> Organizations will continue to need to adapt and incorporate digital technologies into their programming. This will be a good thing for art consumers and patrons by increasing accessibility and improving collaboration. At the same time, organizations will struggle with funding to keep up with technology. Funders so rarely fund some of the infrastructure necessary to create top-notch digital programming, and that will be a major struggle.

On a purely practical level, digital technology, the internet, and social media are powerful tools, giving arts organizations new ways to promote events, engage with audiences, reach new patrons, and extend the life and scope of their work. "We can reach more patrons, more frequently, for

less money," said one respondent. "That's been a huge change in the 30 years I've been in the business."

About this survey

The survey results reported here are based on a non-probability sample of 1,258 arts organizations that received funding from the National Endowment for the Arts (NEA) in the years 2007-2011. Of these 1,258 organizations, 1,155 completed the entire survey; all percentages reported are based on those answering each question separately. The sample is not a probability sample of all arts organizations because it is not practical to assemble a sampling frame of this population. Instead, Pew Internet submitted a Freedom of Information Act (FOIA) request to the National Endowment for the Arts (NEA) to obtain the list of all arts organizations that received grants from the NEA during the 2006-2011 time period. Several individuals from the same organization may have been awarded NEA funding during that time period, thus the sample file Pew Internet received included 5,773 grantees representing 3,644 separate arts organizations. To improve response, advance letters and email invitations to participate were sent to the full list of grantees, and grantees were asked to coordinate with colleagues so that each organization completed the survey only once. The final sample includes organizations of all sizes, from very large to very small, with widely varying operating budgets, staff sizes, and organizational missions. It also includes organizations from disciplines across the arts world. Though there is no national registry against which we could compare this sample, it is possible that it skews toward larger and older organizations compared to all the arts organizations in the country. The nature of the sample also means that smaller organizations among the grantees will have a bigger voice in the survey since they tend to be more numerous – and yet may serve smaller numbers of people in the aggregate. This is inherent in any organizational survey that includes organizations of very different sizes.

Introduction: Evaluating the Arts in America

In the United States, many arts organizations are classified as 501(c)3 nonprofit charities. While they are permitted to generate surplus revenues through their activities, any money earned must be retained by the organization and used for its self-preservation, expansion, or mission-driven work. According to the Urban Institute's National Center for Charitable Statistics, in 2009 there were 39,719 arts, culture, and humanities nonprofits in the U.S. that accounted for $28.7 billion in revenues.[2]

The Pew Research Center's Internet & American Life Project (PIP) designed this survey to understand how arts organizations are using the internet, social media, and other digital technologies to connect with the public. This fits with PIP's longstanding interest in measuring the impact that the internet is having on the public's daily life, but is focused specifically on how arts organizations are navigating the changing technological landscape, how it has impacted their mission-driven work, and the challenges and opportunities presented to the field.

Individuals from 3,644 arts organizations who had received grants from the National Endowment for the Arts (NEA) in the past five years were invited to take the survey; 1,244 completed at least part of the survey, which was available online from May 30 to July 20, 2012.[3]

The vast majority of the organizations taking part in the survey categorized themselves as nonprofits: 84% state they are nonprofits, while 10% say they are arts groups associated with a college or university, and 5% are connected with a state or local government. Only two organizations out of 1,244 classified themselves as for-profit entities.

Nearly three quarters (73%) of organizations that completed the survey have existed for more than 20 years, and another 19% have been around for 11 to 20 years. Only 21 organizations have less than five years of history. This means that the sample is composed of arts organizations with a relatively successful track record and perhaps more able to take advantage of technological advances than all the arts organizations in the country.[4]

Organizational budgets of the respondents range from less than $50,000 a year to $10 million or more annually, with the largest representation in the $50,000 to $500,000 range. And their staff sizes are relatively small: 46% have five or fewer full-time employees. The survey respondents represent a geographical range, with arts organizations from every state, the District of Columbia, and Puerto Rico.

When asked to describe the community in which their organization is currently based, 70% state they are situated in an urban center. However, answers to subsequent survey questions suggest that arts organizations are using technology to stretch beyond these time-and-place based constraints, with some serving not only their locale, but also communities all over the world.

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[2] Urban Institute, Nonprofit Sector in Brief 2011, table 2, page 4.
http://www.urban.org/UploadedPDF/412434-NonprofitAlmanacBrief2011.pdf
[3] Please see the Methodology appendix for a more complete description of the survey methodology and sample makeup.
[4] Please see the Methodology appendix for additional detail about the survey respondents' traits and characteristics.

The scope of services and pursuits of arts organizations in America is vast, from museums and opera companies, to small-scale literary book publishers, to organizations preserving native culture or serving disadvantaged youth. How these organizations use the internet and technology — as well as their access to resources — is as diverse and specialized as their missions.

Nearly a quarter of respondents — 22% — say they are a performing group, while another 14% classify themselves as an arts service organization. Seventeen percent of responding organizations place themselves in the "other" category. These organizations describe themselves as performing arts presenters, specific types of museums (history, children's), gardens and parks, dance troupes, state and local arts councils, multidisciplinary organizations, and others.

Organization Function	Count	Percent
Performing Group	278	22%
Arts Service Organization	170	14%
Art Museum	117	9%
Arts Center	93	8%
Arts Council/Agency	71	6%
College/University	42	3%
Performance Facility	38	3%
Cultural Series Organization	37	3%
School of the Arts	29	2%
Fair/Festival	27	2%
Community Service Organization	21	2%
Gallery/Exhibit Space	18	1%
Cinema	14	1%
Literary Magazine	14	1%
Independent Press	13	1%
Media—Radio	12	1%
Media—Television	10	1%
Social Service Organization	7	1%
Library	7	1%
Arts Camp/Institute	5	*
Foundation	5	*

Respondents were also asked about the disciplines in which their organizations work. The answers suggest an even mix of visual arts, music, theater, dance, literature, photography, and media arts. No one discipline is over represented.

As far as services offered, participating groups include organizations that curate performances, conduct arts education or media production, support the creation of art, and offer technical support and professional development to the arts community. Far from focusing on one task, 49%

of respondents indicate they are providing between four and seven services; 16% of organizations are providing 10 or more different arts-based services.

The arts organizations participating in this survey represent a healthy cross-section of the American arts and culture landscape. These are organizations with significant history that are promoting engagement in a variety of artistic disciplines, and serving artists and audiences in every state.

In the next sections, we will examine the ways that these U.S.-based arts organizations are using the internet and social media.

Section 2: Organizational Technology Use

The digital technology revolutions that have swept over the American population have affected arts organizations as well. Alongside advances in computing, broadband connectivity, and mobile phones has been the development of social media networks like Facebook, Twitter, and Pinterest, photo-sharing services like Flickr and Instagram, video sites like YouTube and Vimeo, check-in apps like Foursquare, and socially driven recommendation sites like Yelp and LinkedIn. The combination of portable computing, more accessible broadband and wireless, and applications that make it easier to promote, communicate, and share creates a potent mix, not only for the public but also for the arts field.

Arts organizations now have dozens of internet tools at their disposal; tools that can be used to create awareness of their organization, promote events and exhibits, provide customized experiences for patrons, sell tickets or merchandise, streamline customer service needs, and expand access to the arts. Yet even when internet tools are free, there are costs; those associated with staff capacity and training, investments in technological infrastructure, and the insistent need to serve as broad a patron base as possible. Today's arts organizations are tackling the question of how best to use these tools to serve their mission.

Events

Presenting and hosting events is a core function of many arts organizations. Indeed, 94% of survey respondents say that they host or sponsor in-person events or exhibits. And 29% of the organizations say they host online events, such as webinars, virtual performances, or virtual exhibits.

When asked about changes in the number of events they are curating or hosting, more than half (51%) of the organizations say they are hosting more in-person events than in the past, while 36% say it had stayed the same.

When asked about online or virtual events, 86% of the 337 respondents say the number of events had increased, and another 12% say the number had stayed the same. A scant 1% noted a decrease in the number of online or virtual events.

More online events

Over the past several years, would you say the number of ONLINE events and/or exhibits hosted by your organization has...
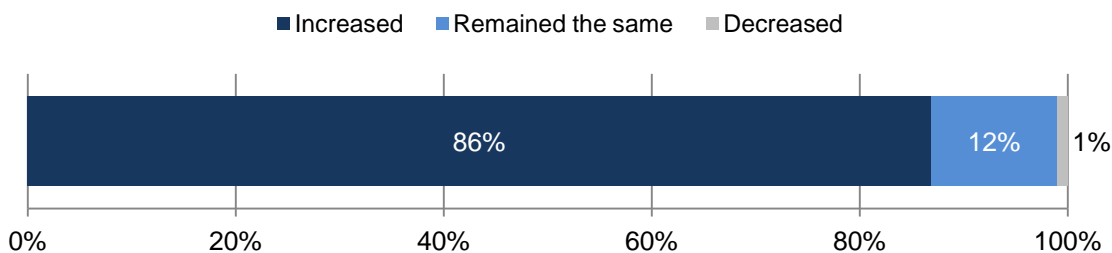
■ Increased   ■ Remained the same   ■ Decreased

86%	12%	1%

0%   20%   40%   60%   80%   100%

Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=337.

Online presence and aptitude

Of the organizations completing this survey, 99% state that they have a website, while 97% say their organization has profiles on social media sites such as Facebook, Twitter, YouTube, and Flickr. In addition, 69% of organizations say that individual employees have professional profiles on these social media sites that they use in their capacity as representatives of their organizations.

The survey asked arts organizations to compare against others in their field their ability to use the internet and social media tools effectively. The results draw a typical bell curve; 60% of the organizations say they are "about average" in their internet and social media abilities, while 20% of the organizations say they are "ahead of the curve" and 19% describe themselves as "behind the curve."

How arts organizations feel about their tech competence

■ Ahead of the curve   ■ About average   ■ Behind the curve   ■ Don't know/can't answer

20%	60%	19%	1%

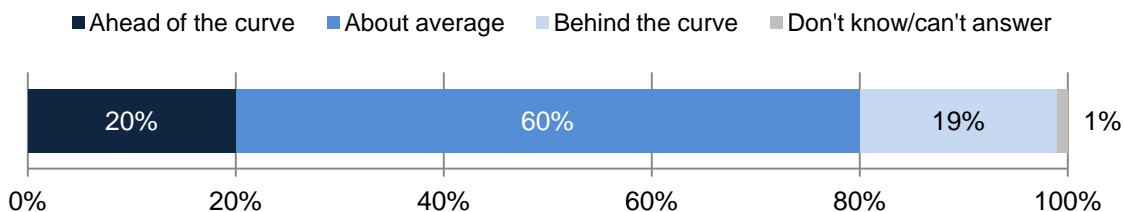0%   20%   40%   60%   80%   100%

Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,222.

Organizations were also asked about their overall reaction to new technologies. Thirty-nine percent of the organizations surveyed think they generally embrace new information and communications technologies well, while another 51% thought this is only somewhat true of their organization.

There is a larger divergence around staff expertise. About 20% of these organizations disagree with the statement that they need outside assistance to help them set up or run new devices, suggesting that they have the capacity in-house to adopt new technologies. But on the other end of the scale, 16% say that they do rely on outside help to get them up and running with new

devices or technologies. The remainder of the responses lie somewhere in between these two points.

How well arts organizations feel they embrace technology

■ Very well   ■ Somewhat   ■ Not much   ■ Not at all   ■ Don't know/Can't answer

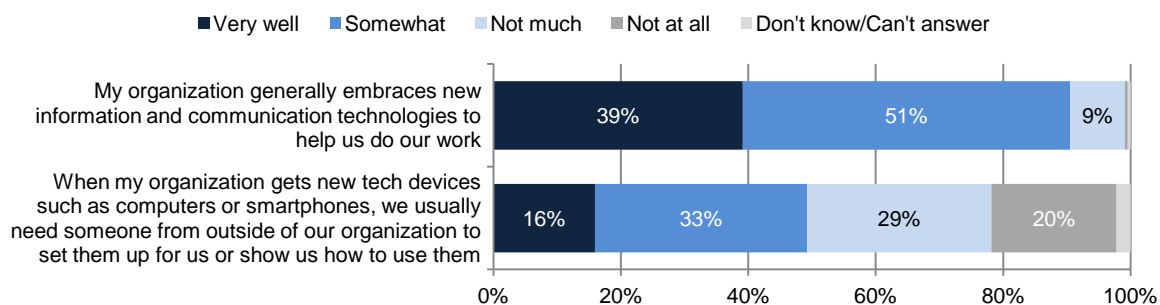|			
My organization generally embraces new information and communication technologies to help us do our work	39%	51%	9%
When my organization gets new tech devices such as computers or smartphones, we usually need someone from outside of our organization to set them up for us or show us how to use them	16% 33%	29%	20%

0%   20%   40%   60%   80%   100%

Source: Pew Research Center's Internet & American Life Project Arts Organization Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,150.

The perceived value of internet and digital technologies

Many of the leaders of arts organizations responding to this survey report that the internet and digital technologies are very important to various aspects of their work. Among those who answered this question, a majority consider the internet and digital technologies "very important" for "promoting the arts" (81%), "increasing audience engagement" (78%), and funding-related work (65%). A majority also agree that the internet and digital technologies have had an impact on increasing organizational efficiency, and engaging in arts advocacy.

The importance of the internet to arts organizations

% of arts organizations who say the internet is very important or somewhat important for these purposes

■ Very Important   ■ Somewhat Important

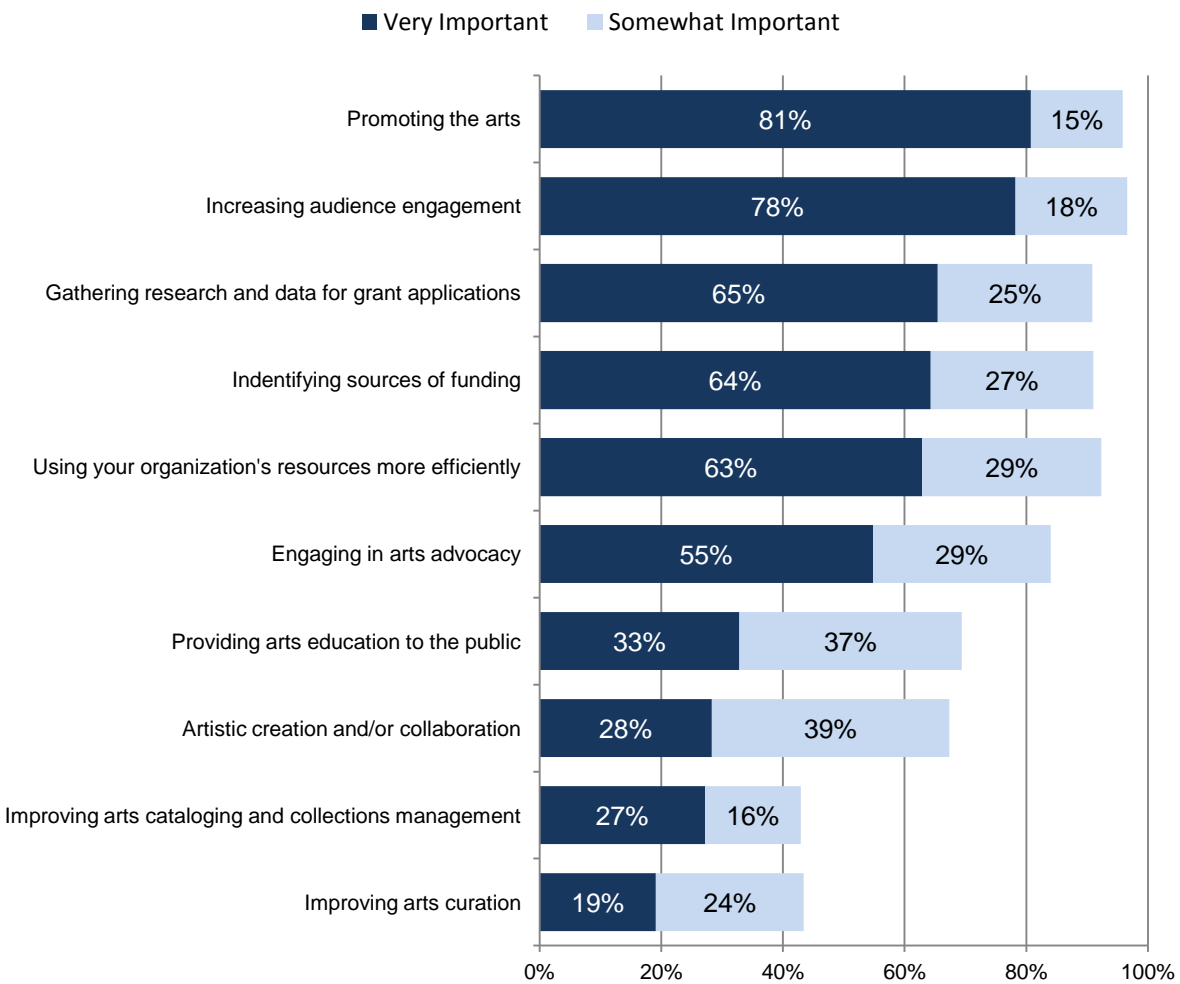| Purpose	Very Important	Somewhat Important
Promoting the arts	81%	15%
Increasing audience engagement	78%	18%
Gathering research and data for grant applications	65%	25%
Indentifying sources of funding	64%	27%
Using your organization's resources more efficiently	63%	29%
Engaging in arts advocacy	55%	29%
Providing arts education to the public	33%	37%
Artistic creation and/or collaboration	28%	39%
Improving arts cataloging and collections management	27%	16%
Improving arts curation	19%	24%

Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,212.

It is interesting to note where arts organizations are less in agreement about the internet's impact on collections material. Only 27% of respondents think it's "very important" for improving arts cataloging and collections management, and 19% feel it's "very important" for improving arts curation. However, this is more an indication of the differences in arts organizations' objectives than a dismissal of the internet's value. There were many organizations (38% and 30%, respectively) that say these activities were simply "not applicable" to their work.

Clearly, the internet is seen as a valuable tool that is "very important" for core organizational work. But the internet and digital technologies are relatively new (and ever-evolving) developments. How are arts organizations adapting to change?

Biggest challenges for adopting new technologies

Survey respondents were also asked an open-ended question about the greatest challenge in adopting digital technologies. The majority of the 1,206 organizations that answered this question cite such things as "cost and staffing issues," "capacity/funding" or "time and staff resources." But other organizations more explicitly describe their challenges associated with this transition to more digital marketing, information sharing, and customer service. Some talk about the challenge of just keeping up with change. One notes:

> Limited staffing and time. The learning curves for each technology, combined with the number of updates that are required to keep things current, add up quickly.

Others reference the transitional nature of this era. While many new tools help with promotion, marketing and operations, not all patrons are proficient in, care for — or even have access to — online services. With a mission to serve as broad a base as possible, arts organizations are being careful not to exclude non-internet using patrons during this transition. This means many organizations are doing double-duty:

> Our biggest challenge in adopting digital technologies is the inconsistent levels of familiarity our audience has with various technologies: some of our patrons do not use — or don't how to use — a number of digital systems, while other patrons assume and demand such information. We can't seem to please everybody.

> Our established base of constituents and supporters come from an older generation who are not as likely to be comfortable using online and technological solutions. Our challenge is to keep these supporters engaged while trying to reach out to our student participants and younger audience through digital technologies.

Other respondents talk about the difficulty in finding a balance between managing existing work and dedicating time and resources to new initiatives. With limited budgets and staff, how is work prioritized?

> Determining how to address the time and resources required to implement/ maintain new digital initiatives while continuing existing activities can be a challenge. Adding new without subtracting something frequently results in attempting to continually do more with static levels of resources/funding.

Some organizations also mention how long — and how much staff tending — it takes for some initiatives to really gain traction:

> Deciding how much / finding the time to commit to these technologies has definitely been a big one. As Digital Media Manager, I'm responsible for the website, email and digital marketing ... in addition to things like our social media channels, video creation and app maintenance. Finding a balance in all these mediums has proven challenging since social media requires a lot of love + attention over a long period of time to become really effective.

Nearly half of the organizations (49%) report that they have sought funding specifically to support projects that expand their organization's use of the internet or other technologies, such as apps and social media. This is not surprising, given how many cite costs and funding as one of the major obstacles to adopting new digital technologies.

And, 36% of organizations state that they have conducted research to learn more about how their audiences use technologies.

But, securing funding for technology and trained staff has been "difficult." Some organizations talk more explicitly about finding the money to support their digital initiatives …

> The greatest challenge is obtaining the financial resources needed to hire additional staff and equipment to acquire digital content and manage online efforts.

… and that there are no dedicated revenue streams to fund infrastructure projects.

> Staffing – time required to create, manage, and maintain these technologies. Also cost to maintain software, hosting, etc. – small amounts, but cumulative and on-going, without corresponding revenue streams.

Others talk about the challenge of finding money for initiatives that may improve patrons' experience, but are difficult to connect with audience growth:

> It is perhaps most difficult to fund infrastructure and maintenance. Through digital technologies, the capacities of the museum have grown geometrically in collections management, digital assets management, digitally based content and website development, upkeep and outreach. While many of these elements enable access for a large and diverse audience to engage physically and virtually with the museum's collections and exhibitions, there is little funding available for the technological infrastructure and maintenance that to not directly show metric impact on audiences.

Still others refer to the constant pressure to find funds to maintain and upgrade technology:

> Money and resources. Social media is free, but things like mobile technology and integration with online ticketing – even ticketing apps on Facebook for example – aren't free. Technologies are developing faster than we are raising money to implement them, and we're facing a significant setback if we can't keep up.

> The expense of maintaining and upgrading technology is considerable and depreciation is inevitable, due to constant advances. We frequently need to determine what investment is most critical and when we can best afford it.

Others challenge the assumption that social media and emerging technologies are low cost or free:

> The ability to include them in the already very full plates that our staff and Board carry. If we were in a better financial position we could contract this out, but we

can't afford to. And everyone seems to think that the great thing about internet and digital technologies is that "anyone" can do them. But the fact is, that to do them correctly and to keep doing them, you need to have someone trained and focused on these tasks.

A set of comments address the challenge of integrating these new tools into their workflow to best serve their mission:

> [The biggest challenge is] having the time for staff to dedicate to these activities – learning about technology, selecting tools from the many available, thinking about how they can fit into our work, and actually implementing technologies.

> Determining what content is most relevant or effective, and what technological channel is most appropriate for that content. Identifying those technologies that visitors feel comfortable using in a museum setting.

One organization sums up the challenges associated with staff capacity and simply keeping up with the velocity of change:

> Staff time, plain and simple. We have been very lucky to have supportive, encouraging, and inspired leadership and experimental, smart, and creative staff. We have been careful and judicious in prioritizing which digital technologies should be pursued based on our mission and content. Without resources to add staff, digital projects have been integrated with existing workflows. We're all doing our best to do more with less. Staying on top of (and sifting through) the rapidly changing field of digital technologies also remains an ongoing challenge.

Thus overall, survey responses clearly show that arts organizations have embraced the internet, (99% host a website and 97% have a social media presence), and that they perceive the internet and digital technologies as "very important" to core parts of their work, including promoting the arts and engaging with audiences. The most common challenges for arts organizations regarding emerging technologies and services relate to the shifting balance among staff capacity, expertise and funding. Many arts organizations envision ways they can better serve their patrons and further their missions using technology and social media, but without funding dedicated to infrastructure and IT initiative, some find themselves struggling to keep up.

Section 3: Website Use

Virtually all of the participating organizations have a website, and 97% have organizational profiles on various social media sites. This section examines how arts organizations manage their internet properties, and the platforms in which they participate. Section four examines social media use in detail.
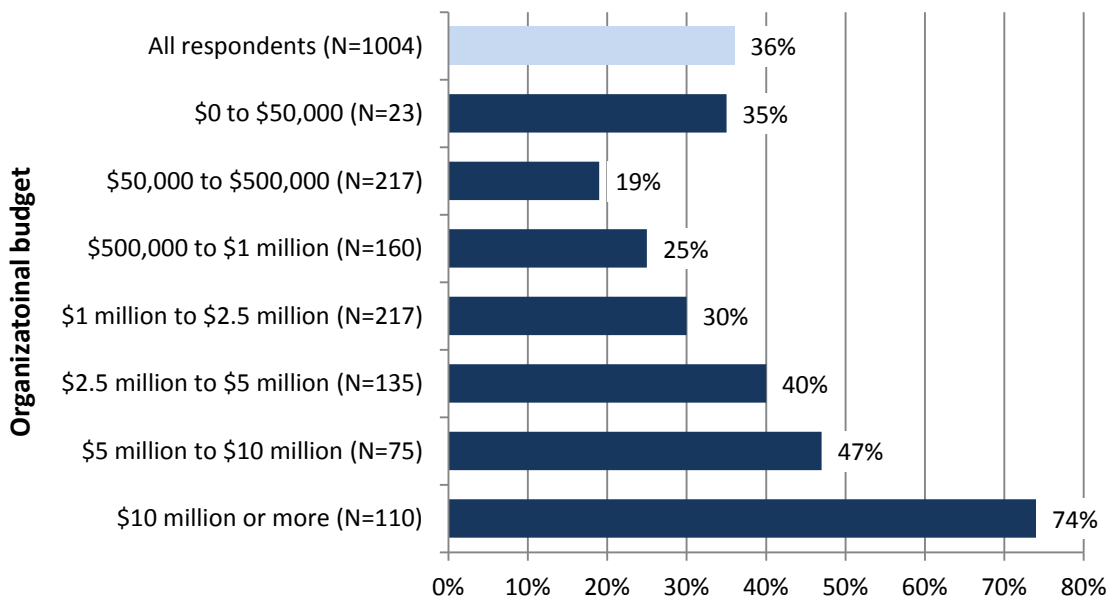
Website maintenance

Providing rich information about an arts organization's projects, events, history, and staff is easily facilitated through websites, but all websites need frequent content updates, current information, and solid performance in order to be effective. How are arts organizations managing this task?

For 68% of the organizations in this survey, paid staff members (either full time or part time) are maintaining the website, while 23% rely on paid contractors, and 9% depend on volunteer help.

More specifically, the survey asked whether there were staff members dedicated to website maintenance and development. Only 36% of arts organizations have a staff member whose primary responsibility is website management.

Organizational budgets seem to affect this number. Forty-four percent of arts organizations in the sample with annual budgets of $1 million or more have staff dedicated to website management. Only among the largest organizations — those with budgets of $10 million or more — do a majority report devoting a specific staff member to these tasks.

Percent of organizations that have a paid employee whose main responsibility is website management and content

Organizatoinal budget	Percent
All respondents (N=1004)	36%
$0 to $50,000 (N=23)	35%
$50,000 to $500,000 (N=217)	19%
$500,000 to $1 million (N=160)	25%
$1 million to $2.5 million (N=217)	30%
$2.5 million to $5 million (N=135)	40%
$5 million to $10 million (N=75)	47%
$10 million or more (N=110)	74%

Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,004.

How arts organizations use their websites

The survey asked arts organizations to list the ways that they are using their own websites — and other sites — to fulfill their mission. The question included 18 different activities, and organizations could report as many activities as applied.

What arts organizations do with their websites

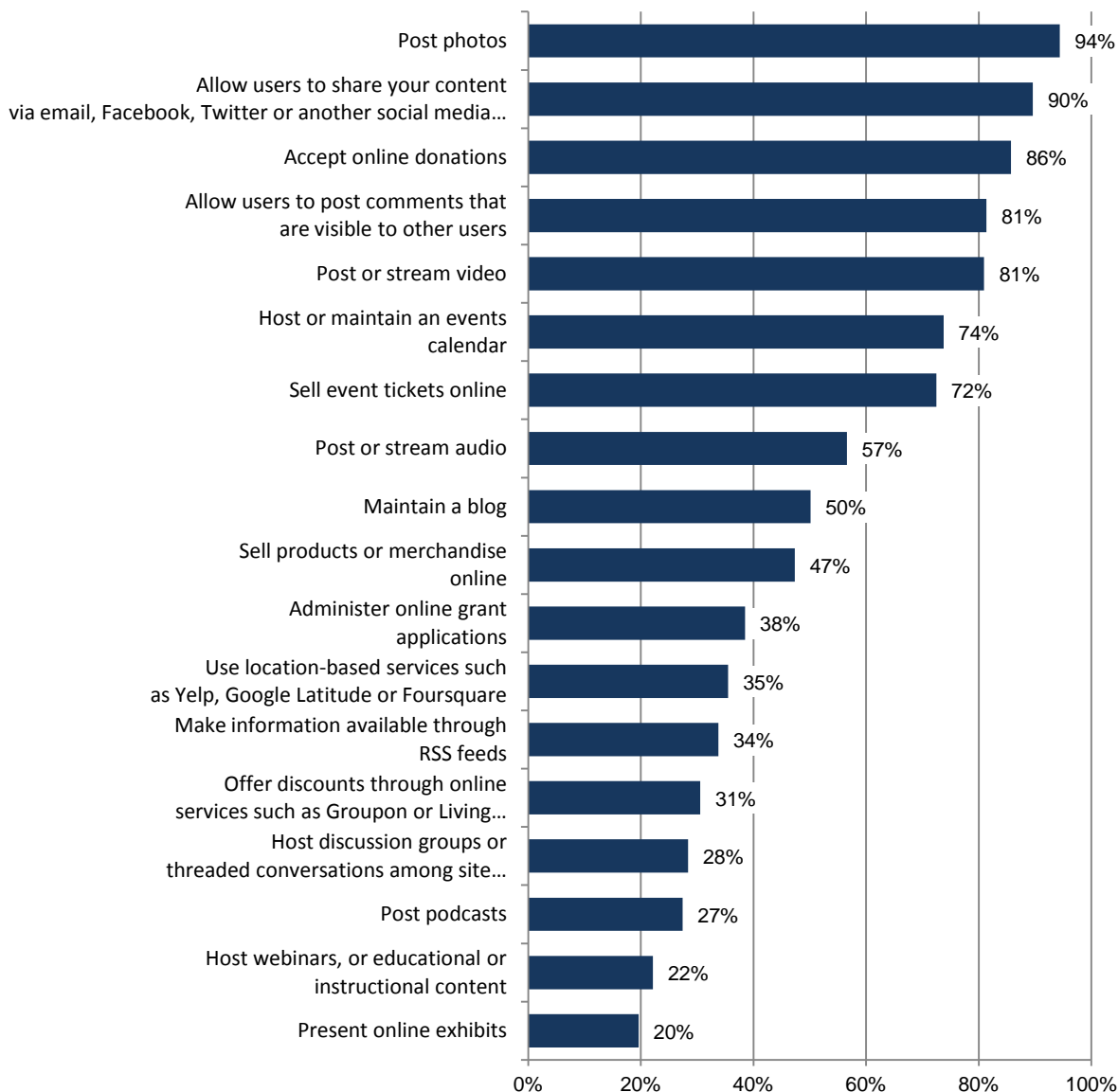| Activity	Percent
Post photos	94%
Allow users to share your content via email, Facebook, Twitter or another social media…	90%
Accept online donations	86%
Allow users to post comments that are visible to other users	81%
Post or stream video	81%
Host or maintain an events calendar	74%
Sell event tickets online	72%
Post or stream audio	57%
Maintain a blog	50%
Sell products or merchandise online	47%
Administer online grant applications	38%
Use location-based services such as Yelp, Google Latitude or Foursquare	35%
Make information available through RSS feeds	34%
Offer discounts through online services such as Groupon or Living…	31%
Host discussion groups or threaded conversations among site…	28%
Post podcasts	27%
Host webinars, or educational or instructional content	22%
Present online exhibits	20%

Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,197.

Content creation, sharing and comments: The most common activities relate to posting and sharing content: 94% of these arts organizations use their website to post photos, 81% are posting or streaming video, and 57% are streaming audio. In addition, 50% of these arts organizations say that they maintain a blog. They are also facilitating content sharing and communication with patrons: 90% allow users to share the organization's content via email, Facebook, Twitter, or another social media platform, and 81% allow users to post public comments on their blog or website.

Event promotion and management: The other major category of activity involves event promotion and management: 74% of the organizations surveyed host or maintain an online calendar, and 72% are selling tickets online.

Other activities: Lower on the list are activities that only apply to a certain type of arts nonprofit. For instance, 38% of organizations are using their website to administer online grant applications, but 16% say that this activity is not applicable to their work.

Mobile apps and text donations

Asked if their organization currently uses mobile and tablet-based applications — or apps — to deliver information or services, 24% of survey respondents say they use apps to provide content to the public. Fewer use apps to facilitate organizational work, sell tickets or merchandise, or to train their staff. In a separate question, 5% of the surveyed organizations report that they accept donations or gifts via SMS or text messages.

The percentage of arts organizations that use mobile apps to ...
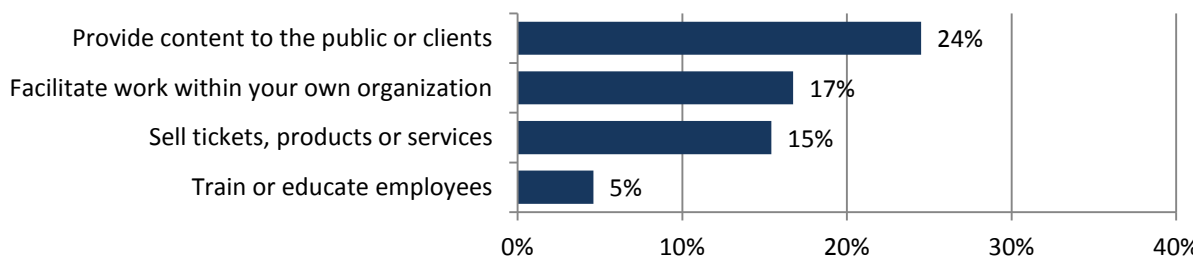
Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,194.

The chart above suggests that only a handful of arts organizations have developed apps to serve their mission. This is likely because of arts organizations' limited budgets, a point underscored by many survey respondents in open-ended questions. These organizations often struggle to find funds to support basic internet and web platforms, and the cost of mobile app development would present a further challenge. Related is the reticence of many arts organizations to invest in cutting-edge technology solutions, some of which will not last or be useable by many of their patrons who are not early tech adopters.

Other uses of technology and the internet

Responding organizations were asked to describe other online or web-based activities in which they are participating. The range of answers is notable. Some talk about using technology to improve organizational workflow and efficiency:

> [We have a] password protected portion of website for board members. Minutes, reports, agendas are posted to this site so that board members can read in advance of meetings.

> We use Dropbox to keep our prop lists up to date so that the stage management team can change the prop lists in rehearsal and the prop coordinator can access it and know it is the most up to date version of the list.

> We use Google Apps to make online collaboration among staff and board easier, thanks to a Google Grant we make use of $10k/month in free Google Adwords, we implemented a new browser-based donor management system, and use a Google Site to track all grant applications and status. We also accept donations on the fly at events etc., through use of the iPhone-friendly Square App.

> We are a 100% virtual organization — every employee telecommutes from their home, negating many expenses traditionally incurred by having office space.

Others mention using technology to connect artists to resources:

> We are currently participating in "online booking" for dance rehearsal space rentals through NYC Performing Arts Spaces, allowing artists to look for available space and book space online.

> We have an online networking tool that allows literary artists and aspiring literary artists to connect with each other in search of services (editor, agent, manuscript help, copyeditor etc.).

Technology and social networks can also facilitate more collaboration and participation:

> We invite professional writers to have a hand in social media curation, such as taking over our Tumblr feed for a period of time. Allow site users to curate and publicly share their favorite online content.

> We host two open calls for exhibition proposals annually and all jurying is done online. Approximately 100 jurors read the 500 word proposals online and cast their votes using a special web portal that we've designed.

And they create more public awareness of art-related events:

> We market on local apps on phones that identify our theater as something to do when people enter a certain neighborhood.

Our agency also hosts a great, free online arts and cultural events calendar [that] showcases the arts across the state. We have even partnered with convention and visitors bureaus from three major cities in the state to help support and finance this online calendar, which is very popular.

Some organizations focus on how technology makes it easier to serve patrons and audiences:

We're implementing mobile ticket this year and eliminating traditional paper-based tickets. Older patrons not comfortable with mobile technologies are still able to just use will-call services at events.

We allow Select Your Own Seat on our website, with seat maps plus photos showing views from those approximate locations.

Festival schedule is interactive and customizable--user can create his/her own schedule and then share it.

We offer cell phone audio tours. These tours have been a tremendous way to reach out to our constituency with both historical audio that has been digitized, and new content that has been recorded and transmitted via MP3. Additionally, we are in the process of expanding our audio tours to include Smart Phone tag access for additional information dissemination. We also have a touch screen kiosk that has been an invaluable tool in assisting our guests in the process of interacting with the both literary and visual arts, our history, and our permanent collection in an intimate, albeit technologically advanced manner. The kiosk program is also available off-site via the web. The dual-action nature of our new media resources (on-sight and off-sight) has given us powerful tools for reaching many more constituents.

Technology is also helping organizations extend and deepen audiences' experience:

Specific concerts that have real-time program notes that include history, composers and other interesting information. Audience members sit in a specific section of the auditorium and can connect to a secure site where the notes are distributed and choreographed to the music playing – live in the theatre.

We use Skype for filmmaker Q&A's following screenings. It allows our audiences to talk directly to the artists but the artist can call in from anywhere in the world. It's wonderful, it still feels very personal despite the fact that the artist is miles away.

We accept questions for our artists via email and Twitter and then tweet out our Talk-Back Q&A.

In addition to posting audio clips on our web site's show pages, we also publish playlists for various music series on iTunes.

We have a video blog called the Musical Theatre Factory where our artistic director posts 1 – 3 vlogs a week. We also have an in-depth show archive so that folks can go back and look up everything related to a show (production photos, sizzle reels, casting, reviews).

Images of all 12,000 objects in our collection are available on our website through our Online Collection. Some objects include scholarly essays. Information for educators is available through our Online Curriculum. Our Pinterest page, which we update using images from the Online Collection, is gaining in popularity.

We are developing our searchable, on-line Timeline of past programming (exhibitions, publications, concerts, performances, readings, artists' talks, etc.) going back nearly 38 years, and continually augmenting the text-based content and scanned, downloadable publications with more and more visual content: scanned and digitized analog slides from pre-digital-era gallery exhibitions, video & audio clips, etc. This has already served as a valuable resource for research for art historians, curators, journalists, artists, arts educators, and students.

Technology and social media also remove time-and place-based constraints:

We have begun to use Google Hangouts On Air broadcasts for sharing our Institute training both globally and locally free. This next week we will be attempting a simultaneous drumming class in Philadelphia and the Philippines.

We are currently creating a 3D virtual exhibition based on a museum exhibition. When fully developed, the virtual exhibit will extend the audience for the exhibit and it will serve as a pre and post visit learning opportunity for school groups.

We just recently began organizing walking tours of our public art projects through Pinterest.

Our center school's music program for children with disabilities between the ages of 3 and 22 uses Skype as a virtual classroom in which we are linked with music performance, instruction and cooperative grant writing with over 20 university music ed programs and organizations for children with similar disabilities around the world.

During the past four years we were able to use the internet to elevate the voices of those most affected by the criminal justice system – prisoners, corrections officers, their families and loved ones, and the communities where prisons are sited. Our website allowed us to represent the culture of mass incarceration in new and incisive ways, such as by establishing an online venue for the creation and exchange of prison poetry, a suppressed genre that should contribute to our nation's understanding of itself.

They can also facilitate novel programming and fundraising ideas:

We created Facebook profiles for the two main characters in *As You Like It* that toured to high schools. They told the story of the play through status updates in modern language, and we invited students and teachers to friend them and interact with them.

For the past several years, we have hosted an online fundraiser – the Clarion Write-a-Thon. The Write-a-Thon is like a Walk-a-Thon, but instead of pledges per mile walked, we have writers getting pledges per word, chapter, or story written. The web site we've developed for the fundraiser allows each writer to have his or her own editable page with stated writing goals, to join an online discussion group with other writers and a Clarion writing mentor, to post to a "team blog," and of course, it enables sponsors to support individual writers through online pledges and donations. It's been very successful from both fundraising and support for writers' standpoints.

The responses to this open-ended question point to the seemingly endless possibilities the internet and digital technologies represent for the arts, and the novel ways organizations are already using these tools to do everything from increasing workplace efficiency to deepening and enriching audience experience.
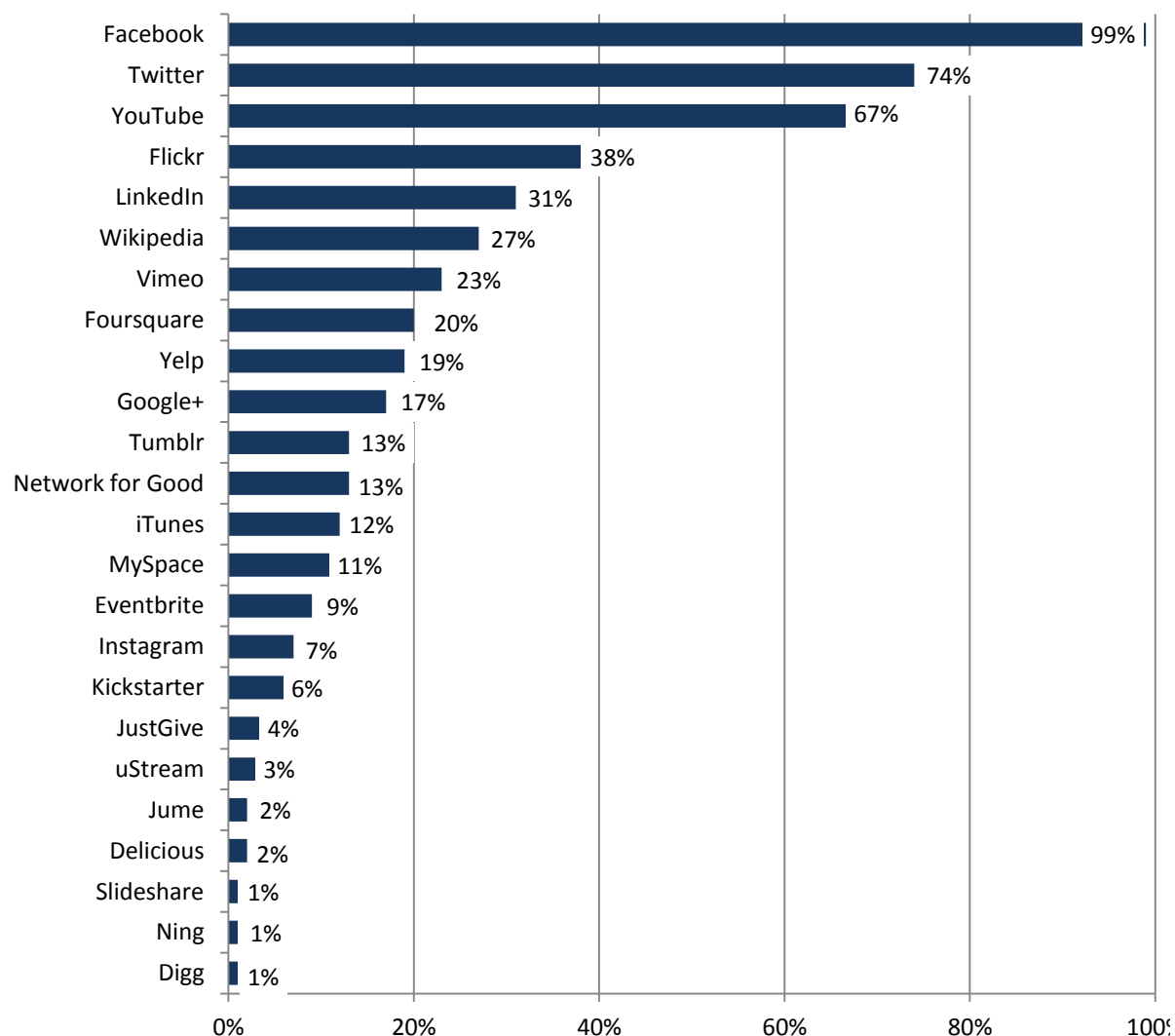
Section 4: Social Media Use

Though the most popular social media are less than a decade old, they have transformed arts organizations' outreach and engagement with their audiences. Ninety-seven percent of those surveyed here say that their organization has a profile or page on a social media site such as Facebook, Twitter, YouTube, or Flickr. In addition, 69% of these organizations say that individual employees have professional social media profiles that they use in their capacity as a representative of the organization. This section looks specifically at arts organizations' social media use and its impact on their work.

Social media sites

Survey respondents were asked to identify all of the sites on which their *organization* has a presence. Of the 30 social media sites listed, Facebook is the most common response among the organizations that use social media, with 99% of the arts organizations responding to this question saying that they have a profile on this site. Next is Twitter, used by 74% of organizations, followed by YouTube at 67%.

The social media platforms that arts organizations use

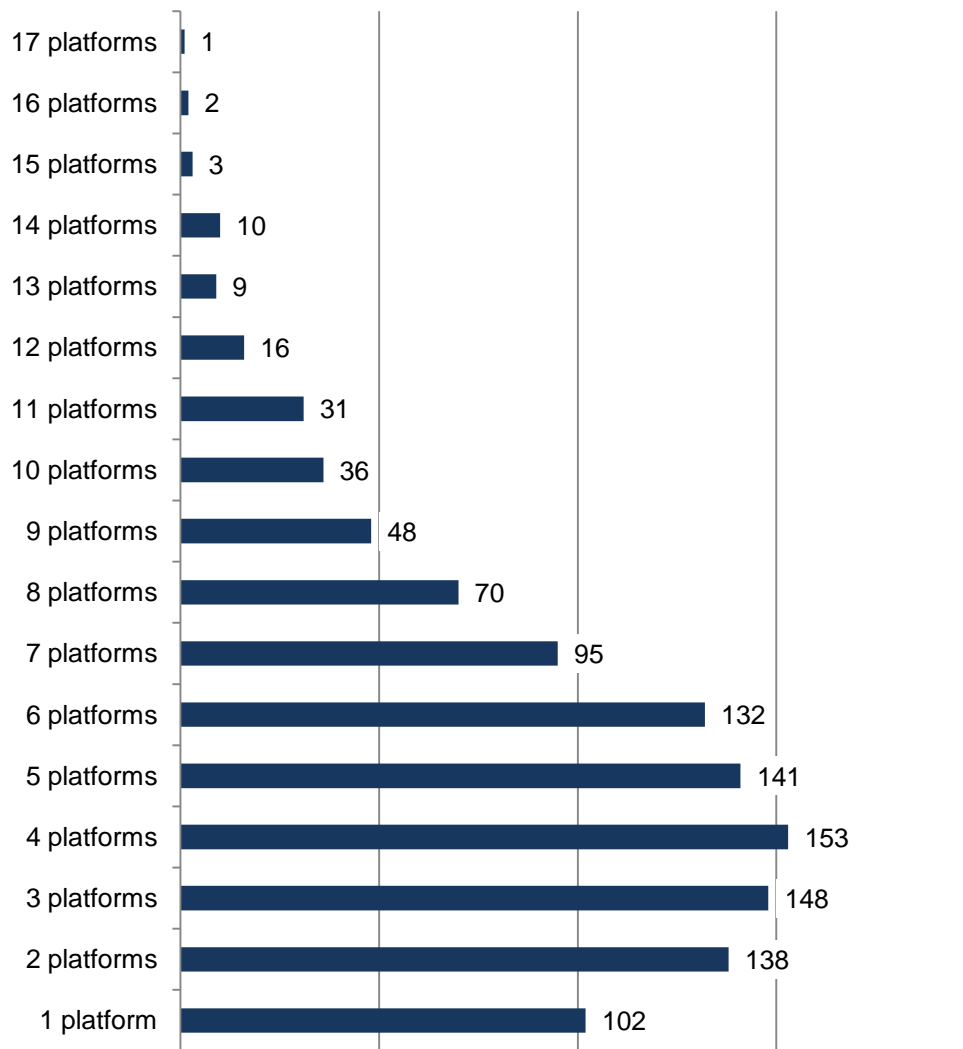| Platform	Percentage
Facebook	99%
Twitter	74%
YouTube	67%
Flickr	38%
LinkedIn	31%
Wikipedia	27%
Vimeo	23%
Foursquare	20%
Yelp	19%
Google+	17%
Tumblr	13%
Network for Good	13%
iTunes	12%
MySpace	11%
Eventbrite	9%
Instagram	7%
Kickstarter	6%
JustGive	4%
uStream	3%
Jume	2%
Delicious	2%
Slideshare	1%
Ning	1%
Digg	1%

Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,202.

In the "other" category, 48 survey respondents listed Pinterest — a newer entrant on the social media scene — while others mentioned Skype, Songkick, and Crowdrise.[5]

While Facebook, Twitter, and YouTube are the most popular social media sites in which these arts organizations engage, participation was not limited to these three. In fact, the majority of arts organizations that use social media — 56% — have a profile on between four and nine social media sites. Some 10% of the arts organizations surveyed that use social media noted they are active on 10 or more platforms.

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[5] Another resource that tracked social media use by arts organizations is based on a 2008 survey by the National Endowment for the Arts: "Audience 2.0: How Technology Influences Arts Participation." Available at: http://www.nea.gov/research/new-media-report/index.html#

The number of social media platforms that arts organizations use

Platforms	Count
17 platforms	1
16 platforms	2
15 platforms	3
14 platforms	10
13 platforms	9
12 platforms	16
11 platforms	31
10 platforms	36
9 platforms	48
8 platforms	70
7 platforms	95
6 platforms	132
5 platforms	141
4 platforms	153
3 platforms	148
2 platforms	138
1 platform	102

Source: Pew Research Center's Internet & American Life Project Arts Organization Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,140.

Adults who connect with the arts through social media are much more engaged

In an August 2011 nationally representative telephone survey of U.S. adults, conducted by Pew Research Center's Internet & American Life Project, respondents were asked about different ways they engage with cultural institutions such as museums, arts organizations, and performers. At that time:

- 44% of all adults had attended a live music, dance, or theater performance in the 12 months prior to the survey; among those who follow a music/dance/theatrical group or venue on a social networking site, the figure climbs to 77%
- 35% of all adults had visited a museum in the last 12 months; among those who follow a museum on a social networking site, the figure is more than double at 82%

- 35% of all adults had attended an arts, craft or music festival in the last 12 months; the figure is 55% when looking just at those who follow individual artists, musicians or performers on a social networking site
- Finally, 29% of all adults had visited an art gallery, show, or exhibit in the last 12 months. The figure is almost three times as high (82%) among those who follow an art gallery or other visual organization on a social networking site

These data suggest that adults that connect to arts and cultural organizations through social media are much more likely to attend events and exhibits than those who do not. Presumably, many adults who follow these institutions on social media do so because they are already patrons. Yet given their power to "hook" patrons and expand audience through these platforms, arts organizations may see tremendous dividends in social media properties that are informative, engaging, and relevant to their audience.

Managing social media profiles

Although these social media platforms are usually free to join and to use, there are other costs to using them, including dedicating staff time and resources to keeping these profiles fresh, relevant, and active. An earlier open-ended question revealed that arts organizations recognize the potential and reach of these social sites, but also are concerned that social media require constant tending, proper staff training, and management to make them effective.
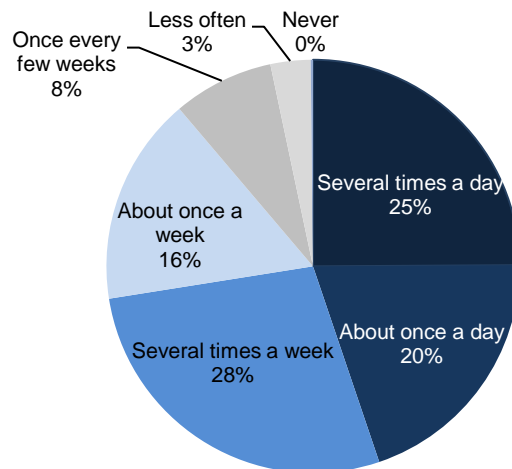
The survey asked respondents who use social media if there are specific staff members in their organization tasked with managing social media sites. Some three-quarters (76%) of those social media-using groups reported they have full-time paid staffers tending the sites; 29% have part-timers doing the job; 16% have volunteers doing it; 8% have paid contractors. However, this question allowed for multiple responses, and 13% say their social media profiles are managed by a combination of full-time and part-time staffers, while 13 organizations (1%) are using a combination of staff, outside contractors and volunteers.

Even with a large percentage of these arts organizations using paid staff to manage their social media profiles, it seems this task is often added on to existing work. Only 27% of these social-media using arts organizations state that they have a staff member whose position is *dedicated* to social media management, while 76% say they have staffers who oversee social media while also doing other things for the organization.

How often organizations post

Arts organizations in the survey that report using social media were also asked about the frequency of their posts: almost half (45%) say they are posting to social networks daily, including 25% who post several times a day. Just over one-quarter (28%) post content "several times a week," while another 16% post "once a week." The remaining 11% of social-media using organizations post less frequently. Even with staff capacity issues, these figures suggest that many arts organizations see social media activity as an important part of their workflow, and one that requires frequent tending to keep content up to date and relevant.
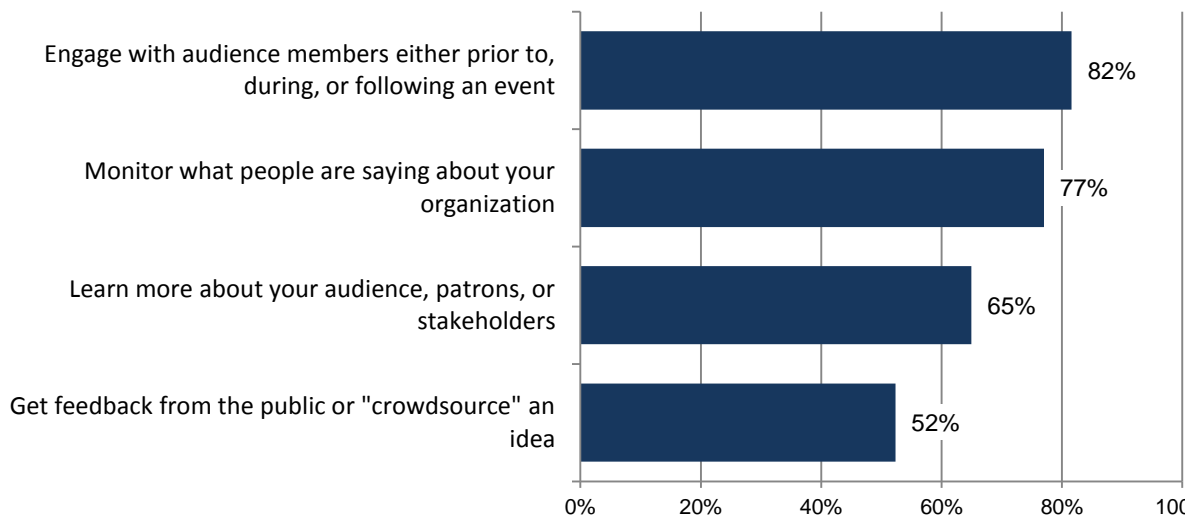
How often organizations post content on social media

How they use social media

The arts organizations that use social media say they are using these applications for a range of activities.

What arts organizations do with social media

Engaging with audiences: 82% of the arts organizations participating in the survey that use social media state that they use these tools to engage with audiences before, during, and after events. Responses to additional questions in the survey underscore how integral social media has become for organizations that host events; social media help with audience awareness of and reminders about upcoming events, as well as marketing and promotion. Social media also give organizations the ability to link directly to ticket sales, offer last minute discounts, or alert attendees about program changes. Finally, social media do what traditional forms of marketing does not do; create a viral buzz through the sharable nature of information on social networks.

Monitoring organizational profile: 77% of the social-media-using organizations use these networks as a social barometer, to monitor what patrons and the public are saying about their organizations.
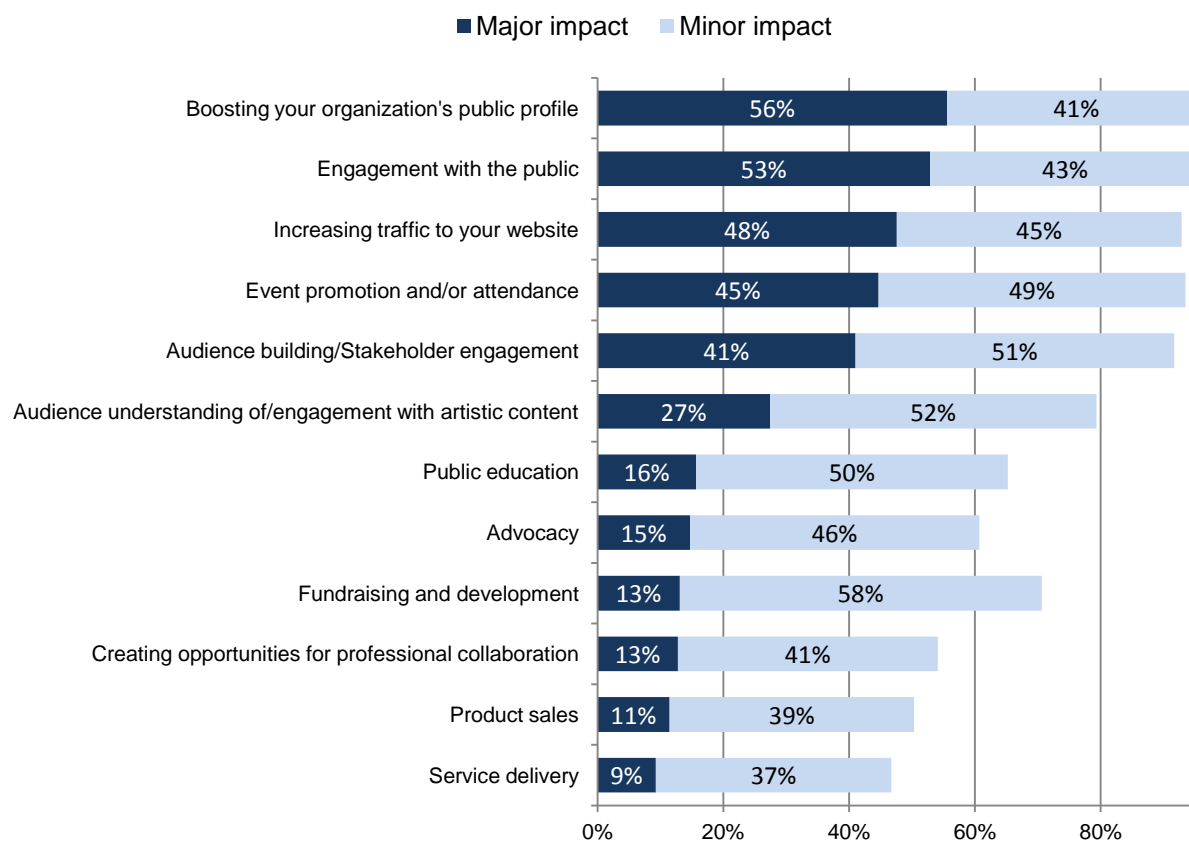
Gathering information and input: Nearly two-thirds of organizations (65%) that use social media say they use the tools to learn more about their patrons through more direct communications, as well as online surveys and polls. In addition, over half of organizations (52%) have used social media to crowdsource an idea, from possible programming decisions to the best times for sessions or seminars.[6]

Social media's impact

Survey respondents were asked about the perceived impact that social media have on their organization. Fifty-six percent of the social-media-using organizations say it has a "major impact" on boosting their organization's public profile, while 53% say it has a "major impact" on their engagement with the public. Social media are also seen by many organizations as helping them increase their website traffic, promote events, and build audiences. These social platforms are more often described as having a "minor impact" on fundraising, product sales, and public education, among other things.

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[6] For more case study data about arts organizations and social media metrics, see *The Tangled Web: Social Media and the Arts*, Devon Smith, Theatre Bay Area, June 2011. This report provides specific details about 207 Bay area arts organizations' social media profiles, including the number of followers, likes, Foursquare checkins, and frequency of activity. http://www.theatrebayarea.org/Programs/Theatre-Bay-Area-Datapoint.cfm

The perceived impact of social media on arts organizations

■ Major impact   ■ Minor impact

Category	Major impact	Minor impact
Boosting your organization's public profile	56%	41%
Engagement with the public	53%	43%
Increasing traffic to your website	48%	45%
Event promotion and/or attendance	45%	49%
Audience building/Stakeholder engagement	41%	51%
Audience understanding of/engagement with artistic content	27%	52%
Public education	16%	50%
Advocacy	15%	46%
Fundraising and development	13%	58%
Creating opportunities for professional collaboration	13%	41%
Product sales	11%	39%
Service delivery	9%	37%

Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,117.

Survey participants were asked to recount any specific major impacts that social media have had on their organization's work. More than 230 respondents provided examples in an open-ended question.

Social media help organizations clarify what they do, and better describe how audiences can engage:

> Social media has helped us define our brand more clearly to broad audience that wants to engage, rather than just visit a webpage.

> Social media gives us an opportunity to have a more casual interaction with our fans. Hopefully making us more approachable, interesting and engaging on a level that ultimately helps us connect with and expand our audience (and the diversity of our audience).

> Social media deepens our relationships – about 70-80% of the people who regularly like, comment on, or repost our content are donors. Social media provides an additional vehicle for them to engage with – and support – our work.

Connecting our theater patrons with our education work and connecting our educators with our performance work. It has made our organization more integrated.

Social media also help organizations communicate with alumni, patrons, and audiences:

Keeping in touch with our alumni and engaging them in our current activities. Since college emails are shut down after a couple years, we lost electronic contact with most alumni who moved away from home. With Facebook we were able to "rediscover" hundreds of alumni.

Unlike most cultural programs, film programming comes and goes very quickly. Social media has given us the marketing agility we've long required to communicate with audiences about comings and goings and it has transformed audience numbers for us.

We do not have a consistent venue (we work with others all around the world), and we did not previously have a way of hearing from any of our audience members. Social media has provided that important feedback.

It also makes it possible for patrons to engage with *each other*, and for messages to spread:

We find that social media builds community around museum content. It allows the audience to engage one another based upon (and sometimes structured by) the material without being a controlled or linear experience.

When we post in the wake of an emergency, our fans tend to share our posts widely which helps our messages about the emergency relief that we provide reach exponentially more viewers than we could have just under our own steam.

Social media give organizations another way to measure outcomes:

For event attendance, we find that approximately 50% of people who respond 'yes' via Facebook do not actually attend the event.

Serves as a testing ground for interest in potential content. Allows for national participation in programs, including on the part of non-local artists. Allows for industry-wide conversation and goodwill support of sister organizations.

Social media make it possible for organizations to distribute special content to their closest followers:

Allowing our audience to see "exclusive" clips and trailers before they are aired to the general public. Making the audience feel interactive and inclusive.

For some organizations, social media have led to new partnerships:

Aside from face-to-face, Facebook has been the best way for us to communicate with our teenage students. Social media has also connected us more to businesses and orgs in the local community. We've been able to form a couple of beneficial partnerships that grew directly from contacts made over social media.

Social media also reduce marketing and promotional costs:

> Utilizing social media and the internet as a communications tool has allowed our organization to reduce the amount of printed promotional materials needed. We can be more eco-friendly and still get the word out about our exhibitions and events.

Participation on these sites can also boost morale and provide organizations with much needed feedback:

> Employee engagement with the organization through social platforms in real life has created a morale boost. Job postings and music education tips are always the most popular items we post.

> Facebook has kept us visible in the public conversation and has expanded our base greatly. People know what we are doing and respond. We regularly post photos from performances and tours and get lots of feedback on them.

Finally, survey respondents say that social media have forced their organizations to confront the changing landscape:

> It has forced staff, especially those age 40 plus, to recognize that the museum and library world is changing and they must adjust to greater demands by audiences and learn new approaches or be left behind.

Positive social media experiences

Asked to provide specific examples of both *positive* and *negative* outcomes from their social media use, organizations provided many examples. On the positive side, the most common responses related to:

- increased attendance at events
- more ticket sales
- increased public awareness of the organization
- an ability to support fundraising efforts

But, some organizations described specific success stories or clever uses of social media. For instance, social media give some organizations the ability to offer discounts and special ticket offers:

> Several times our organization has made social media special ticket offers that have resulted in increased attendance at performances.

> At one of our annual fundraisers, we offered a special price only through social media. In the week before the event, we sold more than the one-third of the eventual total attendance. We attracted a younger audience, grew the total numbers and spent no money.

It gives organizations a way to involve audiences in programming decisions:

We ask our fans to suggest performers/exhibits/films they'd like to see, which helps us plan and gives us ideas of the types of things they are interested in. We ask for suggestions every few months. Those suggestions are compiled into a list, and we research each of them to determine what might be a good fit.

We asked our Facebook page if they would like to see comedian Gabriel Iglesias. They affirmed he would be a good choice, we booked him, and sold out the show without spending a dollar on marketing.

It also gives organizations the ability to promote and sell out shows without spending money on traditional marketing:

Our summer children's program was completely filled last year and advertised ONLY on Facebook. The previous year, we used more traditional methods of advertisement and were only at half capacity.

I was offered an add on performance of the national tour of CATS. I rarely add shows outside of season. Rum Tum Tugger was being done by an actor who had graduated from a local high school. His grandmother and mother called and asked if I was going to do the show, and guaranteed they could sell the house out. On our Facebook page we challenged our friends to show their support and friend us and tell us how many tickets they would buy and friends they would bring. Developed a buzz and we had people email us their name and email address. We surveymonkey'd them and found out how many tickets they would order. Sold out one whole show of CATS with no advertising, ended up having to add another show, that we did some advertising on. Built an enormous amount of support from this neighboring community.

Social media give arts organizations a way to personally communicate with patrons:

Social media allows us to interact with our patrons in a way we haven't been able to before. After seeing that a patron has checked into our venue or has been talking about how good our show was, we thank them publicly and invite them back. This gives us the ability to create a personal interaction with them and create a connection that encourages them to come back. Sometimes our actors will join in when they see us thanking a patron, and send a personal thanks from the cast.

And, the ability to "broadcast" timely pieces:

Social media, and in this case YouTube, has helped us tremendously to get our message out to the world beyond our four walls. When SB1079 passed in Arizona, our organization (who specializes in Mexican music and dance), in the matter of days, was able to write, record and make a video of a song that directly addressed the issue. The video was posted on YouTube and got hundreds of hits in the matter of days. It was a way for us to execute our mission to a large audience in a short amount of time.

It can help arts organizations tap into a groundswell of support for the arts:

A few years ago our city wanted to cancel a contract with a Public Art project. It was already approved, they just wanted to take back the money. We don't frequently engage in advocacy (only on the big stuff, just too much other work to do), but this would be a very bad precedent. So we exercised our social media tools to raise awareness, coordinate a panel discussion, and eventually a gathering at the city council meeting. Today the project is complete and in place.

We were the subject of comments concerning funding and donations from our local "Tea Party" and our patrons responded in full with comments, examples and telling our story in a stronger and better way than even our staff would have been able to do. We were proud that we did not have to, in any way, defend our value to the community, our audience did this for us.

It gives them the ability to curate and organize arts-related events in new ways:

We staged a series of "surprise" pop-up events during one exhibition that were only announced via social media to generate excitement and a spontaneous feel for the programs. Very successful and events were then reposted by attendees.

Engaging audiences in fun conversations is positive and helps build affinity for an organization. On one occasion we solicited ideas for how to name our "signature cocktail" at an upcoming benefit, based on the theme of the benefit. Facebook fans wrote in with lots of ideas, we picked our top favorites, and then released a poll so fans could vote on the name we ended up using. It generated awareness of the event (which was a record success) and allowed those who might not have been able to attend the event due to its ticket price a way to engage with the party.

And a way to reach new audiences:

We have effectively used social media to increase buzz, increase ticket sales and broaden audience diversity for more "edgy" works - primarily contemporary operas presented in a more intimate chamber format.

All classes are posted and promoted on our Facebook page. Event pictures that are posted on our Facebook page from our annual major fundraising event reach new people when their friends on Facebook are tagged in our photos.

We presented a live performance of a Pakistani artist and live-streamed it, receiving thousands of audience members from across the world. The materials on the program have continued to receive wide response and give the program an evergreen impact, lasting long afterwards. It will provide opportunity to compare with other similar programs.

Social media can generate materials for future fundraising and grant writing, and can even lead to grants in some cases:

We have received many positive comments through our blog and Yelp - which we have used for promotional purposes as well as grant applications.

A recent grant opportunity only came about because the funder was impressed by the size of our social media following and its level of engagement with us on our Facebook page. As a result, we received a sizeable grant because of the widespread support from our Facebook community.

It also gives organizations a new way to strengthen relationships with local sponsors:

We established Sponsor Fridays to highlight and thank sponsors of upcoming events. This has resulted in several new sponsors coming on board who have indicated that they learned about opportunities through our social media platforms.

It can also build social goodwill and celebrate the arts:

Because I believe in experience, my first attempts to use Twitter was to create TwitterMoves, wherein I tweet a daily creative dance prompt out to the unknown. I was thrilled to learn that dance teachers were using these tweets as eeds for developing curriculum, as opportunities to engage reluctant learners and to teach life skills to students with special needs.

The utter joy of our organization around one of our commissioned operas winning a Pulitzer was borne throughout the internet by Twitter and Facebook, allowing all of our patrons and fans to celebrate with us at such an achievement. Not just our patrons got into the spirit of the success, but also our fellow opera companies and artists who we've engaged, whether or not they are often returning visiting artists.

Negative social media experiences

In addition to the varied positive impacts noted, the arts organizations surveyed here recounted some negative outcomes related to social media use. A handful of organizations mentioned common issues such as:

- Social media taking up too much staff time, when there is more important work to do
- Self-serving posts on Facebook where artists are using the organizations' profile to promote their own work or different events
- Spam cluttering up Facebook or Twitter pages
- Spam comments on website or blog
- Accounts being hacked

But, by far, the most common response about negative outcomes related to **unfiltered public criticism of the organization**. Platforms like Facebook, Twitter, and Yelp give the public easy opportunities to air grievances, disagree with programming decisions or complain about customer service issues. And, unlike in the past when such problems were managed one-on-one by staff via phone or email, social media displays these complaints for any reader to see.

Many organizations mentioned instances where patrons had posted critical comments on Facebook or Twitter. However, a number of respondents talk about how they have used negative comments to fix problems and better serve patrons:

The community that follows us is very supportive. If there has been a problem with a product or something, we respond quickly and leave the comments up so that if someone else has the same problem they know we are fixing it.

We get customer complaints via social media, but we address those just like we do any other customer complaint: identify the problem, apologize if we can, fix it for next time, notify the public about the change/fix.

A number of organizations mentioned that other patrons on social media have stepped up to problem-solve or defend their work:

When someone posts a complaint on Facebook or Twitter, more times than not one of our other patrons (not a staff member) will step in and address the complaint, acting as our advocates. Social media has allowed us to become more connected with our fans, so even when they have a problem and are discussing it online, we are presented with an opportunity to show exemplary customer service and address the problem directly... I much prefer our doing this than our never knowing of the issue and allowing it to fester.

Any time you engage in social media, you open yourself up to negative feedback. But by building and engaging with a group of brand advocates on social media, when we do experience negative feedback, it is often answered by peers as opposed to the institution. An example of this would be announcing our summer concert series, and having someone not like one of the many guest artists we bring in. However, for every negative comment, there is usually someone with a different opinion.

While most of negative comments on social media are relatively manageable, some organizations described instances where comments led to larger issues. A few talk about how negative comments can harm their public profile:

We provide grants and an organization who was unhappy about not receiving a grant posted some negative stuff on Twitter. While we responded and kept it professional, it did put negative comments out there associated with our profile, potentially damaging our brand.

People who didn't get tickets for one of our popular performances took to Facebook to express their displeasure with us, which created an outlet for dissatisfied customers to bash us. The media took some of these negative posts and used them as quotes in a story.

Some organizations have had to deal with abusive comments:

Our organization has suffered from the rants of a very negative person. He has taken great strides to post negative comments on our social networks. We have tried to meet with this person, but he refuses and we continuously have to remove his posts from our networks.

There were some other negative outcomes from social media use. Some organizations talk about how easy it is to accidently abandon patrons by communicating through selective channels:

Because we do a lot of work in rural areas, with senior citizens, and low income areas, social media only works for a portion of our audience. Getting everyone informed of a last minute change or spontaneous program simultaneously is tricky without overlooking certain portions of the population. A heavy reliance on social media, though convenient, can exclude many people.

Another pointed out that social media makes it much harder to keep a secret:

The use of social media is so prevalent to everyone these days, sometimes it is hard to keep confidential matters confidential – especially on a film shoot. Crew members are apt to identify location, client, storyline, etc. and broadcast them to friends and family, which in turn get back to client.

A few respondents mentioned the difficulty in setting employee policies that respect freedom of expression, but also protect the organization's brand:

Before we put policies in place, one of our employees, who was a great social media user, kind of merged his own identity on Facebook with that of our organization. Therefore, when he also would party and post about it – it became an area of discipline. And he didn't understand the need for separating these things out, keeping his personal life off of our public profile. That was several years ago.

Employee and constituent had an argument on our Facebook page, became heated, and employee had to be let go.

We had a staff member who crossed the boundaries between personal and professional. On her own Facebook she wrote disparaging things about us, and though she did not identify us by name, it was not disguised either. We have struggled with free expression among younger staff around museum issues and have not come to a good resolution. There are varying opinions about social media and right now the old, conservative guard are in control.

Others mentioned the challenges of using social media without a full understanding of the technology, or having appropriate institutional policies in place:

In the past we've had young, eager employees who were more enamored with social media than doing a good job at work take on "launching our organization into the 21st century." We trusted their expertise, but in fact, they were not skilled in thinking about the right use of each technology for our agency and left us with confusing messages, as well as taking our passwords with them. We spend way too much time trying to re-call and reclaim lost user names and passwords.

We sent out an email blast to over 22,000 email subscribers for an event that had only 30 slots and it sold out so quickly that we received a bit of backlash about it. We should have calibrated it better.
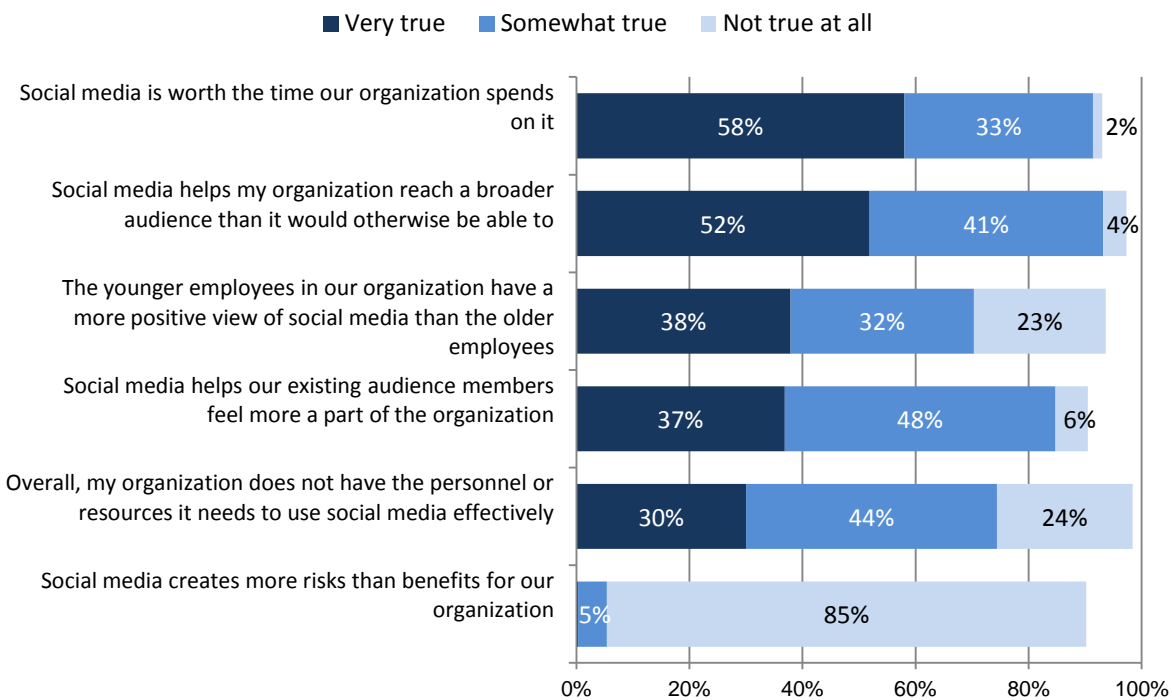
Overall, responses to these open-ended questions suggest that social media's benefits outweigh the drawbacks for most organizations.

Social media's value to arts organizations

Survey respondents were asked to gauge the value of social media based to their organization in a series of statements about the potential impact of these tools. For 58% of organizations that use social media, the phrase "Social media is worth the time our organization spends on it" is "very true," while another 33% thought it is "somewhat true." There is also broad consensus around the statements that social media helps organizations reach new, broader audiences, and that it helps audiences feel more invested in arts organizations.

Survey respondents were also asked about some of social media's inherent challenges. Seventy-four percent of these organizations thought it is "very true" or "somewhat true" that they do not have the staff or resources to use social media effectively, a sentiment that is reflected throughout the survey, while other organizations commented on the generational differences amongst staff members regarding use. Interestingly, 85% of organizations say it is "not true at all" that "social media creates more risks than benefits" for their organization, reinforcing the idea that the arts field sees more positive than negative outcomes using and employing these new tools.

Social media's value to arts organizations

Legend: ■ Very true ■ Somewhat true ■ Not true at all

Statement	Very true	Somewhat true	Not true at all
Social media is worth the time our organization spends on it	58%	33%	2%
Social media helps my organization reach a broader audience than it would otherwise be able to	52%	41%	4%
The younger employees in our organization have a more positive view of social media than the older employees	38%	32%	23%
Social media helps our existing audience members feel more a part of the organization	37%	48%	6%
Overall, my organization does not have the personnel or resources it needs to use social media effectively	30%	44%	24%
Social media creates more risks than benefits for our organization	5%		85%

Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,114.

Why some organizations don't participate in social media

Less than 4% of the organizations responding to the survey are not currently using social media. For these non-participants, "reliable access to resources" and "a lack of a trained staff" are the primary reasons they have not yet engaged these tools. However, for a few organizations –

especially those that work with children, youth at risk, and immigrant populations — the use of social media may conflict with their effort to serve their constituencies.

Why some arts organizations don't use social media

■ Major reason ■ Minor reason

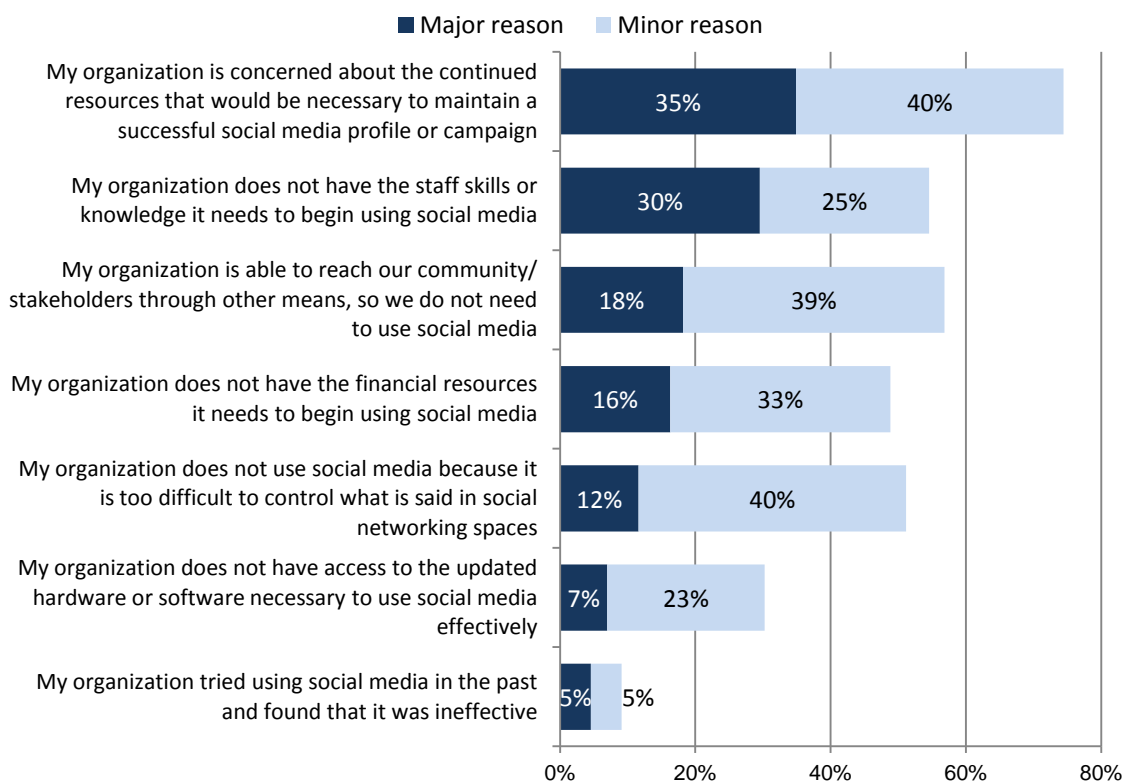|	Major reason	Minor reason
My organization is concerned about the continued resources that would be necessary to maintain a successful social media profile or campaign	35%	40%
My organization does not have the staff skills or knowledge it needs to begin using social media	30%	25%
My organization is able to reach our community/ stakeholders through other means, so we do not need to use social media	18%	39%
My organization does not have the financial resources it needs to begin using social media	16%	33%
My organization does not use social media because it is too difficult to control what is said in social networking spaces	12%	40%
My organization does not have access to the updated hardware or software necessary to use social media effectively	7%	23%
My organization tried using social media in the past and found that it was ineffective	5%	5%

Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=44.

The sentiments expressed in this survey about the use and impact of social media suggest that arts organizations have quickly embraced these new platforms, with 97% of responding organizations using at least one social media platform. Posting content weekly or daily, arts organizations are using these platforms to engage with audiences, promote events, raise (and monitor) their organizational profile, communicate with patrons, streamline their workflow, and reduce marketing costs. But, survey responses reveal this is still a transitional time. Arts organizations noted that social media exposes them to public criticism, has forced them to evaluate their employee conduct rules, and develop strategies that take their participation in these platforms into account. Overall, arts organizations agree that participating in social media is worth the time spent, but as with other technological endeavors, it takes time and planning to do it right.
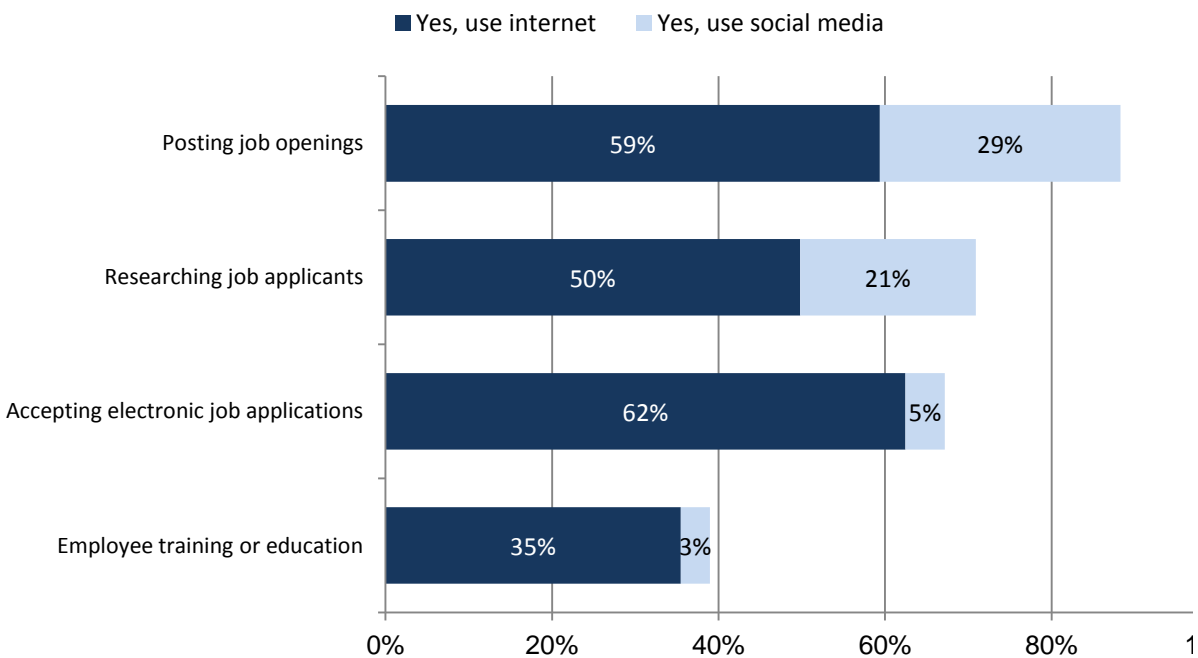
Section 5: Technology and Organizational Function

While this survey was designed to collect information about arts organizations' public-facing participation in technology and social media, it also gathered some benchmark data about how they are infusing technology into their staffing, training, and workflow, and how they are normalizing its use through new guidelines and organizational procedures.

Staffing and hiring

Eighty-eight percent of the arts organizations participating in the survey post job openings online and on social media, while 62% accept job applications via the internet. Seventy-one percent of arts organizations also research job applicants online. Thirty-five percent are using the internet for employee training or education.

Organizational use of technology for staffing and hiring

■ Yes, use internet   ■ Yes, use social media

Posting job openings	59% / 29%
Researching job applicants	50% / 21%
Accepting electronic job applications	62% / 5%
Employee training or education	35% / 3%

0%   20%   40%   60%   80%   1

Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,544.

Policies about internet usage

Many businesses and corporations have amended employee handbooks to now include policies related to employees' use of the internet and social media. The survey asked arts organizations if they were following similar patterns. Only 24% have "written rules regarding how employees present themselves online" while 15% provide formal employee training on acceptable uses of internet and social media. Only 13% of organizations restrict which websites employees can visit on their work computers.
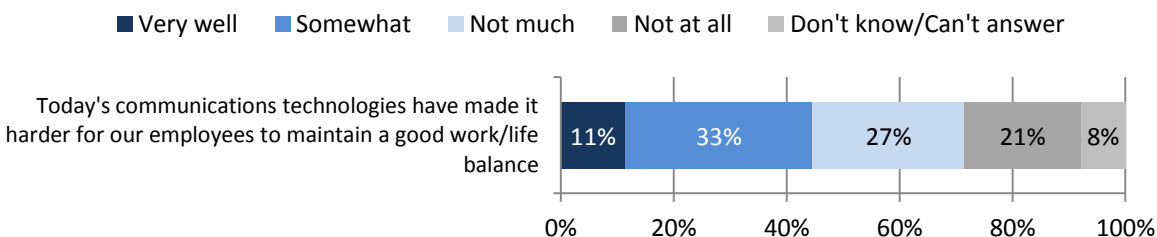
Monitoring staff members' internet use

Arts organizations are also using the internet and digital technologies to monitor inappropriate online activities by staff and to assess them as job candidates. One in five of the organizations surveyed (20%) say they have reprimanded an employee because of something that person posted or shared online, but only 3% have terminated an employee for improper online behavior. Social media activity can also affect hiring; 17% of these organizations say they have recruited or hired someone based in part on his or her online activities, while 10% of organizations say they decided *not* to hire someone because of something that person posted or shared online. Here are the data:

- 20% of the participating arts organizations have reprimanded an employee because of something that person posted or share online
- 17% have recruited or hired someone based in part on their online activities
- 10% have rewarded an employee because of something she posted or shared online
- 10% have decided not to hire or work with someone because of something that person posted or shared online
- 3% have fired someone because of something he or she posted or shared online

Work/life balance: Tech helps and hurts

While 44% of survey respondents agree or somewhat agree that current technologies have made it harder for employees to maintain a work/life balance, a slightly larger portion of respondents (48%) thought that technology has not negatively impacted this balance.

How well does this statement describe your organization?

■ Very well ■ Somewhat ■ Not much ■ Not at all ■ Don't know/Can't answer

Today's communications technologies have made it harder for our employees to maintain a good work/life balance

| 11% | 33% | 27% | 21% | 8% |

0%   20%   40%   60%   80%   100%

Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,150.

How arts organizations measure their online profiles

While building and maintaining websites and creating social media profiles help arts organizations serve their patrons and their mission, there is an ancillary benefit as well: being able to quantify traffic, visits, and the viral nature of campaigns through analytic software. Website analytics can give arts organizations information about how users find their website, how many pages they view, the duration of their visits, the pages that attract the most traffic, and where users exit the site. All of these metrics are helpful in making websites more user friendly, efficient or compelling, and they are also useful data to present in funding applications.

Some 82% of arts organizations in this survey say they track digital usage metrics.

Analytic software: 55% of these arts organizations use Google Analytics to measure their web traffic and campaigns. Smaller numbers of organizations are using similar analytic tools including Wordpress plugins (8%), Webtrends (2%) or Yahoo Analytics (2%). However, 14% of respondents did not know if their organization uses any metrics measurement tools, and 8% state their organization is not using any metrics tools at this time.
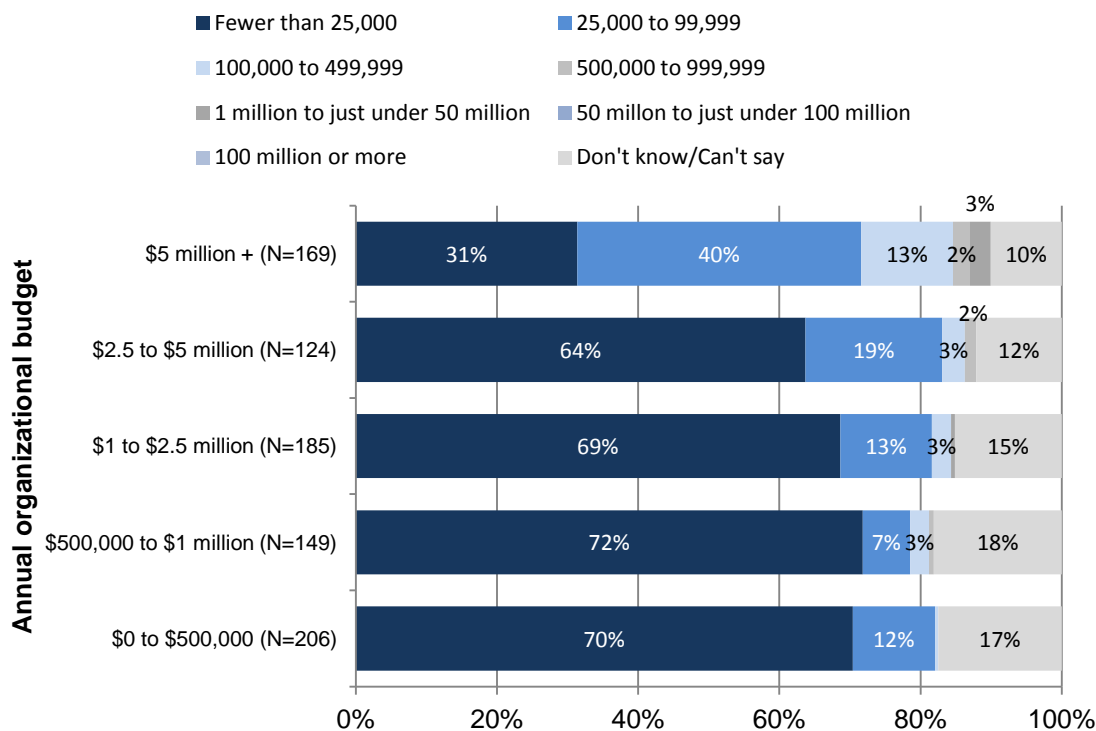
Modest traffic: Respondents were asked to share some top-level metrics based on these analytic tools. The majority of respondents thought their organization's website receives fewer than 25,000 unique visitors per month, a modest but fairly standard number.

Do you happen to know how many MONTHLY unique visitors your website receives, on average?

Response	Count	Percent
Fewer than 25,000	524	60%
25,000 to 99,999	159	18%
100,000 to 499,999	41	5%
500,000 to 999,999	7	1%
1 million to just under 50 million	7	1%
Don't know/Can't say	135	15%

Organizations' annual budgets have a slight impact on unique visitors at the very top of the range; organizations with budgets of $5 million or more report more monthly unique visitors (this sub-population is also the least likely to not know about their web traffic). Otherwise, organizations with different sized budgets don't seem to report much of a difference in unique visitors.

Unique visitors by organizational budget

Legend:
- Fewer than 25,000
- 25,000 to 99,999
- 100,000 to 499,999
- 500,000 to 999,999
- 1 million to just under 50 million
- 50 millon to just under 100 million
- 100 million or more
- Don't know/Can't say

Annual organizational budget

Budget	Fewer than 25,000	25,000 to 99,999	100,000 to 499,999	500,000 to 999,999	1 million to just under 50 million	Don't know/Can't say
$5 million + (N=169)	31%	40%	13%	2%	3%	10%
$2.5 to $5 million (N=124)	64%	19%	3%		2%	12%
$1 to $2.5 million (N=185)	69%	13%	3%			15%
$500,000 to $1 million (N=149)	72%	7%	3%			18%
$0 to $500,000 (N=206)	70%	12%				17%

0% — 20% — 40% — 60% — 80% — 100%

Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=833.
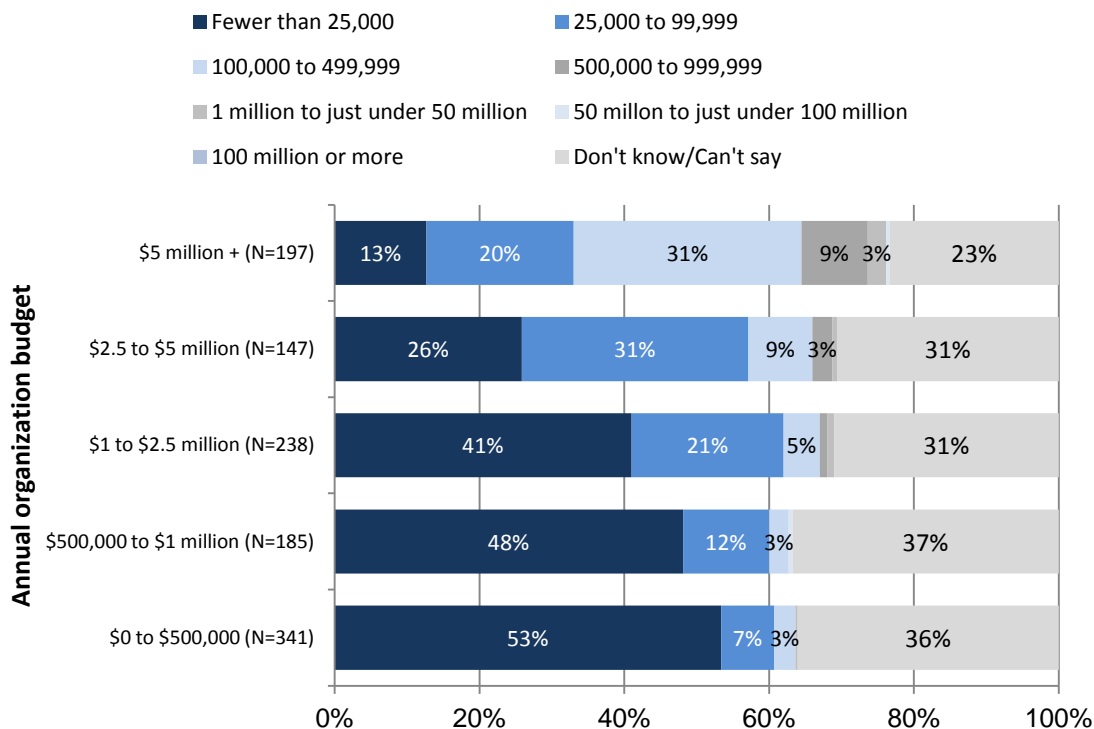
A second measure, page views, is the total number of website pages viewed by users in a given jtime period. This number should typically be higher than the number of unique visitors, because users generally click through multiple pages of an organization's website to find more information or dig deeper into a topic. Thirty-eight percent of organizations thought they receive fewer than 25,000 page views per month, while another 26% thought it was between 25,000 and 500,000.

Do you happen to know how many PAGE VIEWS your website receives in a typical MONTH?

Response	Count	Percent
Fewer than 25,000	443	38%
25,000 to 99,999	192	16%
100,000 to 499,999	112	10%
500,000 to 999,999	26	2%
1 million to just under 50 million	9	1%
Don't know/Can't say	390	33%

As with the metric above, organizational budget does seem to have some bearing on page views. Organizations with budgets over $2.5 million, and especially over $5 million a year, report more pageviews per month.

Pageviews by organizational budget

Legend:
- Fewer than 25,000
- 25,000 to 99,999
- 100,000 to 499,999
- 500,000 to 999,999
- 1 million to just under 50 million
- 50 millon to just under 100 million
- 100 million or more
- Don't know/Can't say

Annual organization budget	Fewer than 25,000	25,000 to 99,999	100,000 to 499,999	500,000 to 999,999	1 million to just under 50 million	Don't know/Can't say
$5 million + (N=197)	13%	20%	31%	9%	3%	23%
$2.5 to $5 million (N=147)	26%	31%	9%	3%		31%
$1 to $2.5 million (N=238)	41%	21%	5%			31%
$500,000 to $1 million (N=185)	48%	12%	3%			37%
$0 to $500,000 (N=341)	53%	7%	3%			36%

Source: Pew Research Center's Internet & American Life Project. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1108.

Website analytics

Survey respondents were asked to describe the most useful or meaningful metrics for their particular organization, particularly measures that have been important to potential funders.

Google Analytics and Facebook's Insight data were mentioned most frequently, but some other common responses included:

- the number of Facebook likes
- the number of Twitter followers
- emailed feedback
- comments on Facebook or on their website
- the open rate on their emailed newsletters

Some respondents suggested that for their organization, the important metrics are not the analytic data, but the *measurable outcomes* of an online presence, such as ticket sales, museum visits, or donations:

The most useful metric has been in measuring the amount of tickets that are sold via our website and the amount that percentage has changed in the last two years. Greater or fewer Facebook comments and likes have also been a useful metric to gauge interest in certain ideas.

Number of people visiting the website and number of people being trained and receiving on-line certifications.

We gauge our audience primarily through tracking number of click throughs to our donation form from our website and through tracking click throughs from Constant Contact email blasts. Also, we track in theater audience numbers.

The most meaningful indicator is bodies through the door to our gallery and theater shows. We provide questionnaires to attendees to gauge their use of our online content and use that to direct our digital media plans.

As to potential funders' requests, most respondents say that funders have not asked for metrics to date, but funders *do* care about measurable outcomes. How closely web metrics and programmatic success align depends on the arts organization and its goals:

I have not been asked for a measure of online impact from potential funders.

To my knowledge, there are no particular measures of our organization's online impact or success that are important to potential funders, though we do provide donors with online visibility though our webpage, social media presence and e-newsletter.

The most important metric is the sales of books. Funders are interested in distribution figures.

The best overall indicators are ticket sales, audience attendance, CD sales, and individual fundraising in evaluating web presence. The web is part of an overall marketing plan for the organization and the organization seeks to utilize it to help expand in exposure that translates to a measurable impact with the items mentioned above. In our experience, those items are what is important for funders, who are concerned with the organization furthering its mission in a variety of ways including through digital media.

Thus, for many arts organizations, website analytics can be powerful tools. They can provide critical information about website use which can be helpful in making websites more user friendly, efficient or compelling. Just like many other internet tools, organizations are faced with not only knowing about and installing these tools, but also learning how to use them, and deciding how information gleaned from analytics will impact future decisions. All of these pieces take staff time, capacity and training, as well as a commitment to including these data in future strategic planning processes.

Section 6: Overall Impact of Technology on the Arts

The arts organizations represented in the survey tend to agree with the notions that the internet and social media have "increased engagement" and made art a more participatory experience, and that they have helped make "arts audiences more diverse." They also tend to agree that the internet has "played a major role in broadening the boundaries of what is considered art."

Perceived positive impacts of technology on the arts

Based on your experiences and those of your organization, do you agree or disagree with each of the following statements?
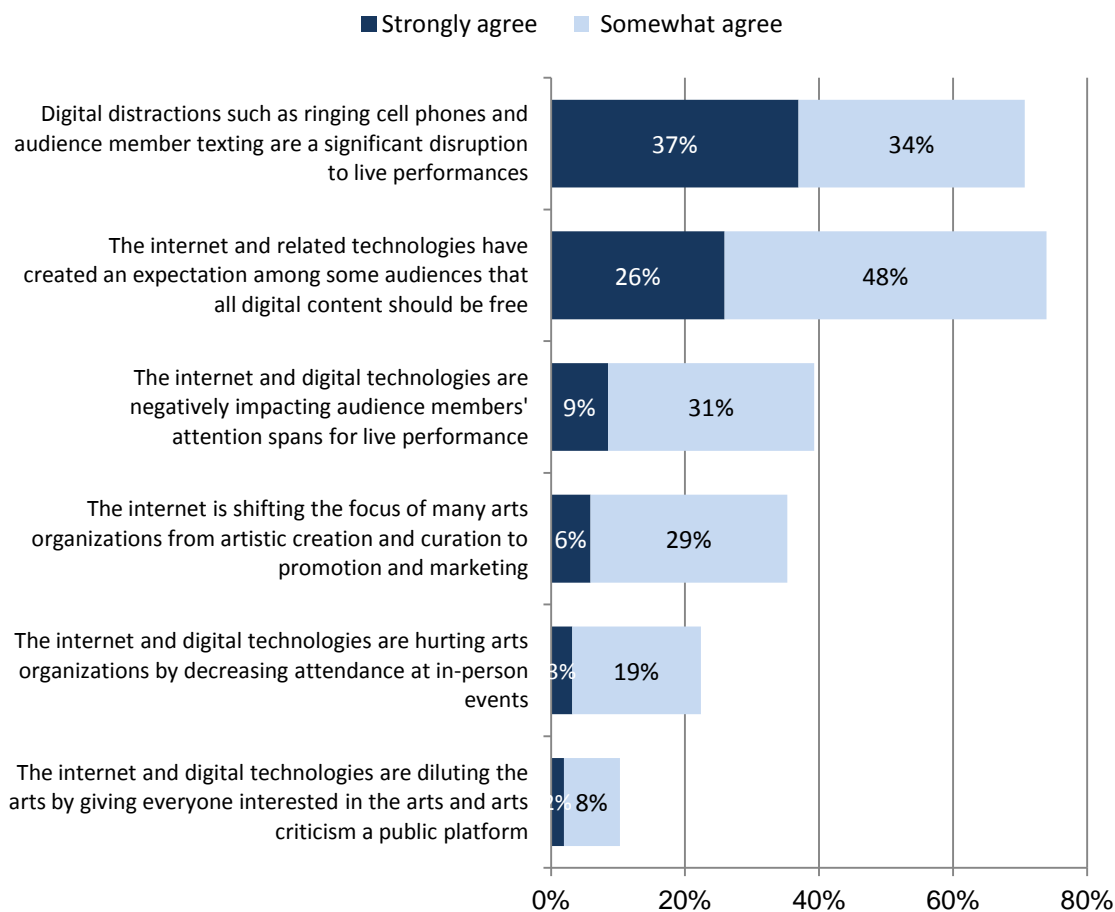
■ Strongly agree   ■ Somewhat agree

	Strongly agree	Somewhat agree
The internet has increased engagement in the arts by providing a public platform through which more people can share their work	50%	42%
Because of the internet and digital technologies, the arts audience is more diverse than it was in the past	31%	52%
The internet has played a major role in broadening the boundaries of what is considered art	27%	50%

0%   20%   40%   60%   80%   100%
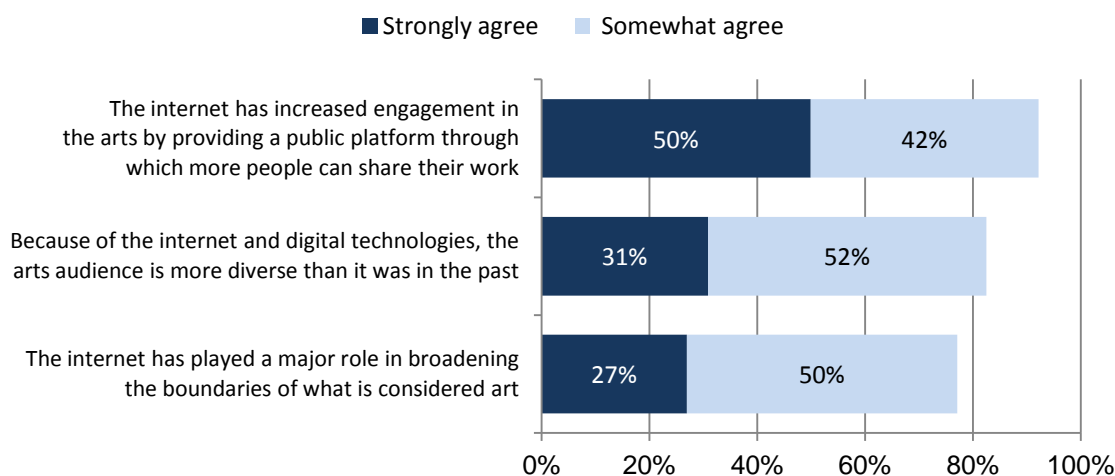
Source: Pew Research Center's Internet & American Life Project. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,207.

Yet at the same time, the majority of arts organizations surveyed also thought that mobile devices, ringing cell phones and texting create "significant disruptions" to live performances, and that technology contributes to an expectation that "all digital content should be free." Survey respondents were split regarding their opinions of whether technology had negatively impacted audience attention spans for live performance, but they uniformly *dis*agree that it has "diluted the arts" by opening new pathways to arts participation and arts criticism.

Perceived negative impacts of technology on the arts

Based on your experiences and those of your organization, do you agree or disagree with each of the following statements?

■ Strongly agree   ■ Somewhat agree

Statement	Strongly agree	Somewhat agree
Digital distractions such as ringing cell phones and audience member texting are a significant disruption to live performances	37%	34%
The internet and related technologies have created an expectation among some audiences that all digital content should be free	26%	48%
The internet and digital technologies are negatively impacting audience members' attention spans for live performance	9%	31%
The internet is shifting the focus of many arts organizations from artistic creation and curation to promotion and marketing	6%	29%
The internet and digital technologies are hurting arts organizations by decreasing attendance at in-person events	3%	19%
The internet and digital technologies are diluting the arts by giving everyone interested in the arts and arts criticism a public platform	2%	8%

Source: Pew Research Center's Internet & American Life Project. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,207.

Despite comments in open-ended responses, only 35% of respondents agree with the statement that the internet has shifted arts organizations' focus towards marketing and promotion, and even fewer (22%) thought that the internet and its endless offerings are leading to a decrease in attendance at in-person events.

Predicting impacts of technology and social media

Asked to forecast the impact that technology and social media will have on the field as a whole in the coming years, respondents mentioned everything from practical implications to broader, soul-searching ideas about the future of creativity.

From a practical standpoint, many organizations state that technology will make them more efficient:

> [We have the] ability to serve more people and at a lower cost.

The internet makes it possible for our organization to market ourselves more effectively through online advertising, blog presences, and social media exchanges. We have been able to decrease our budgets and increase revenue by utilizing online resources effectively.

It is also greatly facilitating their ability to book talent, and to know what to expect:

For arts programmers, the access to high quality media to review artists in advance of assessing them live has been a huge step forward. Spotify alone has made it so much easier to get a first impression of an artist--no more waiting for press kits, accessing only what they've posted on their websites, etc.

Others commented on how technology is changing the behavior of the ticket-buying public:

Last-minute ticket-buying and the trend away from traditional subscription packages will probably continue, as the internet has freed people up from having to plan for most event attendance far in advance. This will affect the predictability of revenue. On the positive side, social media has been a wonderful tool for word-of-mouth marketing.

While it is impossible to know what internet and digital technologies will be like in 10 years, the trend of more information communicated more quickly to a more finely targeted audience with more immediate feedback from the recipient is likely to continue. We believe that this leads people to delay their decision-making about how they will spend their leisure time. For our field, this has generally meant a decline in subscriptions, a decrease in advance ticket sales, and an increase in last-minute box office sales.

Moving beyond the practical, one of the prevailing positive themes is that technology increases – and will continue to increase – access to the arts. In some cases, technology is simply seen as a way to improve marketing and communication to get more "butts in seats," but many respondents noted its power to broaden and deepen the audience experience.

Technology is helping them introduce more audiences to art:

The digital world is a very populist force, leveling the world between rich and poor, educated and uneducated. In our case, an organization with a name like "Historical Society" has an invisible shield that bounces people who are below median income, do not hold college degrees, who hold blue collar jobs, who are a racial or cultural minority, off. The ubiquity of the computer, whether through your home machine, school, or local library, means that all of those things that cause discomfort don't matter. That is a big deal!

It has extended our visibility to many isolated individuals who may never have heard about our services, explored the artform, or who may have financial barriers to membership. We show to them every day what we do, rather than expect them to find a printed annual report and program summary. Social media are concrete and immediate examples of our living community in action.

Technology is also helping arts organizations extend their impact, far beyond a one-time performance or event:

> The internet and digital media provide an amazing opportunity for arts organizations to extend the impact of the arts. A live performance can be complemented greatly by opportunities for further engagement and education, and the ability to share information online maximizes our ability to provide these opportunities at a more in-scale investment ratio. We can reach many more people with an article or video than with a one-time lecture, for example.

> We are able to provide artwork that dates back more than 25 years to the communities we have worked with over the years. For many, these archives represent the only media history of their community. The use of the internet has deepened and expanded the access for our constituencies that are often transitional, without a landbase, or have been historically isolated due to geography.

Technology is increasing access to the arts by breaking geographic constraints:

> I think that it will greatly improve accessibility to the arts field – from a monetary standpoint and from a logistical standpoint. People who live outside of urban areas will be able to experience performances that are somewhat limited to large urban areas. Arts organizations will need to reconsider the level/type of interaction with their audience.

Technology is helping organizations reach more diverse communities – even on a global scale:

> The greatest impact will be the ability for non-profit organizations to share educational content and stimulating art and performances worldwide. It will also spark conversations between diverse communities and help individuals develop a greater understanding – and hopefully, a life-long appreciation for the arts.

> The internet will enable the performing arts to reach beyond a local audience, promote tourism, and make cultural arts created within a region accessible to the nation – and world.

Technology is making it possible to *create* community around a piece of art:

> There is a powerful opportunity for the arts to create communities around performances, shows, exhibitions and their themes and history. For example, a Broadway show like 'Next to Normal' could (and probably has) created communities to discuss and share resources on mental illness.

Some organizations enthusiastically talk about the democratization of art and creation, while others expressed excitement about the challenge of meeting new demands and expectations:

> Continuing the transition from passive to participation, from hierarchical to democratic, from traditional media to online media, from single art-form to inter-disciplinary.

> The possibility to greatly expand and create a more diverse audience is very exciting because traditionally our audience has been older and whiter than the area we live in.

Increasingly, we're seeing some of our content getting traction in surprising nooks and crannies of the internet – which definitely means a shifting audience. The challenge will be for that audience to identify our content with the creators and the institution, and not simply have it exist as more entertainment or noise out on the internet. In the next couple of years, the role of mobile devices will only continue to shift how people curate their own experience and engage with artistic content. In radio, this presents an exciting AND daunting challenge in terms of our funding structure and station loyalty.

The challenges that digital technology present

These arts organizations realize that with these benefits come drawbacks. While digital technologies have led to the creation of ever-more dazzling tools and apps, many arts organizations worry about the long term effect on audiences, the field, and their very mission.

A number of respondents worry about meeting increased audience expectations:

People will have higher expectations for a live event. For audiences to invest the time and effort of going to a live performance, the work they see will have to be more engaging and of higher quality. Events will have to be more social and allow for greater participation and behind-the-scenes access. The event spaces will have to be more beautiful, more comfortable, more inviting and more accessible.

The audience has already moved from "arts attendance as an event" to "arts attendance as an experience." This desire for a full-range of positive experience from ticket purchase, to travel, to parking, to treatment at the space, to quality of performance, to exit – this will only increase over the next 10 years.

The greatest impact of the internet on independent publishers will be audience expectations. Audiences will expect everything to be available digitally, and will require an engaging experience instead of a static one.

Some point out the problem of meeting audience expectations on a limited budget:

Managing expectations. The internet and digital technologies are powerful tools. The public expects content to be free. There is a lack of awareness of the resources (funding and staff) that it takes to manage and preserve digital content. These costs will need to be passed on to users.

Others express concern that the effort to meet audience expectations will influence artistic choices, even entire art forms:

Some ideas cannot be condensed into 140 characters or less. I hope technologies do not negatively affect the playwright. I hope the playwright does not write solely for a Twitter generation.

Live performance will be diminished. Younger people don't want to show up at a specific time, specific place for live performance — they want to download music at their own

convenience. The power of live performance is lost and the civic convening – the community building is lost.

Some arts organizations have recognized this change, and are doing their best to adapt:

> I believe digital technologies are here to stay, and we as an artform should embrace them and learn how to work alongside them. We provide scripts to those sitting in our tweetseats, so they get the quotes right. We must work alongside or face alienating them.

> I believe that audiences will continue to have shorter and shorter attention spans and will insist upon being able to use smartphones and other devices in the context of a performance. As an industry, we should stop fighting and try to find ways to incorporate that reality into our daily lives.

> We will need to become much less tied to live, in person programming and certainly less ties to anchored seats in concert halls. Programming will need to incorporate much more personal involvement by the consumers or they will not be interested in engaging.

A number of respondents worried about audiences' decreasing attention spans, and the long-term impact on the field:

> As attention spans decrease, programming of longer works (e.g., Beethoven's Symphony #9) will become more problematic. As we move forward, we may need to consider ways to embrace the digital, connected world to better engage live audiences or run the risk of making live music performances irrelevant.

> The greatest impact could be the expansion of our audiences, but the worst impact is the attention span of the moment of interaction. I worry that it may shorten our artforms' performance times.

Technology has blurred the lines between commercial entertainment and noncommercial art, forcing arts organizations to more directly compete with all other forms of entertainment:

> Basically, we are competing for the "entertainment slot" in people's schedules, and the more entertainment they can get via HD TV, Netflix, Video Games, etc., the less time they have for live performances, which also entails making an effort to get to the venue (as opposed to slumping on the couch in front of the HD screen). Also, movies, video games, etc., are both more convenient and cheaper than live performances.

It has also blurred the lines between a virtual and real experience:

> As the realism of participatory digital entertainment (video games, etc.) and the immersion ability of non-participatory digital entertainment (3D movies, etc.) increases, it threatens the elements that make the live arts unique--the sense of immediacy, immersion, and personal interaction with the art. We've long hung fast to the belief that there's nothing like a live experience, but digital entertainment is getting closer and closer to replicating that experience, and live theatre will struggle to compete with the former's convenience and cost.

Some respondents addressed issues specific to their field or discipline. Film and cinema organizations talk about the pressure they face to preserve the "specialness" of the big screen when on-demand home viewing is already prevalent:

> As a cinema approaching our fifth anniversary, we have seen significant audience growth in spite of the fact that many of the films we play are being released "day and date" on-demand. While streaming and piracy are increasing, we've been able to deliver the message that seeing films on the big screen with an audience is a singular, important cultural experience. I can't emphasize the importance of the internet and social media in our marketing efforts enough. It's most certainly a net positive value.

> As a film exhibitor, our challenge is to go through the digital convergence for projection and exhibition, a supremely costly change that doesn't even have a long-range viability (these systems will have to be upgraded and/or changed every 3-5 years). Finding the revenue for these digital systems is an enormous challenge and threat to our ongoing activities.

Others working in film worry that the quality and quantity of movies will diminish:

> In the field of film production and distribution, more internet and digital access will result in far fewer movie theaters, as audiences have greater access in their homes to the medium. Already, as marketing dollars become more limited for films, production companies are shortening the movie lifespan in a movie theater and moving them to digital and television media sooner and sooner.

Organizations in the literary book tradition are facing similar challenges with ebooks:

> Literature and the book are being very impacted by digital technologies due to the growing popularity of ebooks and to the influence of huge online booksellers like Amazon. There are both good and bad effects associated with these technologies. These days books are more easily accessible to a greater number of people however it is difficult for the book industry to produce a sustainable amount of income whether for individuals and for organizations. It is crucial that the public understand the importance of supporting nonprofit literary orgs, publishers, independent bookstores, libraries and other supporters of book culture and in turn it is crucial for foundations and government to provide this support.

> All literary magazines are in peril right now, so if magazines such as ours continue to exist it will be because of a paradigm shift in how literature is funded as an art form in the U.S. I am loathe to believe that print publications will cease to exist because they are still more beautiful, but all publishers will eventually have to create simultaneous digital and print editions, I imagine, which will make the whole enterprise more expensive.

Some respondents worry that these disruptive technological and cultural forces will make it harder for some big scale artforms to survive:

> I believe that the more expensive arts producers – symphony orchestras, for example – will find it more difficult to draw enough audience to continue in the same manner they've

operated for the past decades. Smaller groups will find it easier to adapt because they're more flexible (they don't require a large stage and hall). I am very concerned about losing some of the greatest music ever written — symphonic music — for this reason.

Others pointed to innovative experiments — like the Metropolitan Opera's performances in movie theatres — as an example of what big institutions with funding can do:

> For opera, it has made it more accessible, by providing low-cost performance broadcast of Met performances. This has increased the potential audience for our live performances. It is our companies responsible to promote effectively to those audiences. Overall I believe the effect is positive.

Museums have a unique perspective on technology's impact. It has greatly improved their cataloging efforts, but some worry that it will eventually reduce audience interest in the "real thing":

> It will radically shift the way in which we catalog and share information about collections; the museum as less the all knowing authority and more the conduit for rich institution-driven AND user-driven information. It will also allow regional collections the ability to link to similar collections worldwide – as such our local collections can be recontextualize and made meaningful in ways not possible without linked data and semantic web technologies.

> Digital technology and the resulting accessibility of information and images, while fostering accessibility of collections online, have the negative impact of diluting the desire of individuals to visit the museum to see works of art in person.

A number of organizations mentioned the demise of trusted critics and filters, which has happened as print media — especially local newspapers — have cut back on staff and struggled with decreased ad revenue as part of this digital transition. Without critics, they worry about how arts audiences will gauge quality:

> Digital technologies have essentially made it impossible for book critics to support themselves in traditional ways; possibly the next 10 years will bring the shift of book criticism to academic world, where salaries are paid for teaching, and reviewing is a secondary activity. Twenty-five years ago, working critics had full time salaries from newspapers, magazines, other publications. Today there are only a handful of critics able to do this.

> Our chief concern for the literary arts is the increasing "validity" of self-publication among reviewers, readers, and writers. Online publishing and book sales through Amazon (for example) contribute to this problem. If there are no gatekeepers, it will become even more difficult to draw attention to works of genuinely high quality.

For some, the absence of critics and mainstream media previews of arts events means that arts organizations are shouldering an even greater burden:

The demise of daily and weekly newspapers and the increasing fragmentation of traditional radio and television media outlets combined with the increasing consolidation of media ownership due to revised FCC regulations has marginalized arts coverage and criticism to a point where it no longer plays a part in the larger civic conversation. Hence, it is becoming increasingly difficult to reach and engage potential audience members and arts participants, and has shifted the entire burden (and costs) to arts organizations that are ill equipped and unprepared to both engage in their traditional function (i.e., support the creation and presentation of art work) as well as build support structures to take the place of traditional media organizations.

Some responses addressed the future of artists themselves. There is recognition that today's artists must also be entrepreneurs:

Digital technologies will level the playing field for all and old school, professional artists will be left behind. It is the advent of the amateur. For those who are savvy and ahead of the curve, there is money to be made if the content is strong. It means the complete reversal of a contributed based model founded on single funding sources and moves toward an earned revenue model and crowd sourced funding. Now more than ever, artists need to be entrepreneurs and not just artists. You can't survive now as an artist unless you have a strong business model.

Yet others worried openly about how artists will make a living as traditional revenue streams shift or disappear:

[The internet] is becoming the major distribution platform for documentaries, which is what we do. The DVD will be gone in ten years. Artists are going to struggle to monetize their work on the Web.

Access will be good for educational purposes and to increase awareness of the arts especially historical material in performance of all types. However, issues of copyright and payment for that material, such as in apps and in streaming or downloading, are murky and hard to navigate for artists themselves as to value and fairness of payments to the artist for original content.

There were also some contemplative responses about the impact of technology on culture. One respondent pointed out that the ability to collaborate globally could lead to more cultural homogeneity while another worried about the future of non-digitized art:

Digital technologies allows for students and artists all over the world to be inspired by one another. In some ways this is fantastic, in other ways, this breaks down the cultural differences that is so beautiful about having multiple countries involved in an art form.

Materials we have that aren't available digitally will be lost from the human record.

Finally, several respondents summed up the issues facing arts organizations, connecting the challenges of meeting audience expectations with limited funding options:

Attendance at live performances will favor more fervent fans and those with disposable incomes who reside in cities, and the increased prevalence of simulcasts and livestreams will alter the viewing experience while also making it more democratic and affordable. Audiences will expect the digital presence of institutions to be well maintained and curated.

Organizations will continue to need to adapt and incorporate digital technologies into their programming. This will be a good thing for art consumers and patrons by increasing accessibility and improving collaboration. At the same time, organizations will struggle with funding to keep up with technology. Funders so rarely fund some of the infrastructure necessary to create top-notch digital programming, and that will be a major struggle.

Survey results reveal that on a purely practical level, the internet, digital technologies and social media are powerful tools, giving arts organizations new ways to promote events, engage with audiences, reach new patrons, and extend the life and scope of their work. "We can reach more patrons, more frequently, for less money," said one respondent. "That's been a huge change in the 30 years I've been in the business."

But, technology has also disrupted much of the traditional art world; it has changed audience expectations, put more pressure on arts organizations to participate actively in social media, and even undercut some arts groups' missions and revenue streams.

Beyond the practical, the internet and social media provide these arts organizations with broad cultural opportunities. Comments in this survey reveal an array of innovative ways that arts organizations are using technology to introduce new audiences to their work, expose more of their collections, provide deeper context around plays and exhibits, and break down cultural and geographic barriers that, to this point, have made it difficult for some members of the public to participate. Their responses suggest that the majority of these arts organizations, with enough funding and foresight, are eager to use the new digitals tools to sustain and amplify their mission-driven work.

Methodology

All data reported here are based on a survey of a sample of arts organizations conducted by the Pew Research Center's Internet & American Life Project from May 30–July 20, 2012. Pew Internet staff developed the 30-minute online survey to study how arts organizations are currently using the internet, social media, and other digital technologies to share content, communicate with patrons, and manage their organizational objectives. At several points during survey development, Pew Internet solicited input from a diverse group of 11 experts in the arts field, who provided feedback on survey content, focus and language. This advisory group included local, state and national organization leaders, those working in the nonprofit arts sector, as well as researchers and practitioners in the field. Their input was invaluable in shaping a survey that captured the experiences of a wide range of arts organizations serving many missions in many different disciplines.

Survey sample

The survey results reported here are based on a national, non-probability sample of 1,258 arts organizations. The sample is not a probability sample of all arts organizations currently operating in the U.S. because it was not practical to assemble a sampling frame of this population. Instead, Pew Internet submitted a Freedom of Information Act (FOIA) request to the National Endowment for the Arts (NEA) to obtain the list of all arts organizations that received grants from the NEA during the 2006-2011 time period. The NEA provided a list of 5,773 grantees, which included the applying grantee's name, their organization, mailing address and email address.

Contact Procedures

In an effort to obtain the highest possible response rate to the survey, advance letters were mailed to all 5,773 grantees in the sample explaining the purpose of the survey and that they could expect to receive an email invitation to participate in the coming week. The letter included the email address on file for each grantee and asked them to contact Pew Internet if their email address was incorrect.

While the overall goal of the survey was to measure the different ways arts *organizations* use digital technologies to further their missions, it is important to note that NEA funding is made at the level of individual grantees and project directors, rather than at the organizational level. Several individuals from the same organization may have applied for and been awarded NEA funding during the time period specified, thus the full sample file included information for 5,773 *grantees* representing 3,644 unique arts *organizations*. In many cases, the parent organization could be easily identified. However, in the case of larger institutions such as universities and state governments, it could not be determined whether the organizational unit was best defined as the entire institution or as a subunit such as a department or agency. Because of this ambiguity, and in an effort to maximize response rates in a field with considerable staff turnover, advance letters and email invitations were sent to all 5,773 grantees in the sample file. The email invitation alerted grantees to the possibility that more than one individual in their organization may be asked to participate and asked that they coordinate their response with colleagues so that only

one survey is submitted on their organization's behalf.

Email invitations included a live link to the online survey and a unique username and password. When individuals clicked on the survey link, they were sent to a secure login page and asked to enter this information. Thus, arts organizations with no grantee in the file received from NEA could not opt-in to the sample and are not represented in the survey. Of the 5,773 email invitations sent, 1,408 were either rejected by email filters or returned as undeliverable.

Almost all grantees who clicked through to the survey completed at least part of it. Of the 1,291 unique visitors to the survey, 1,258 completed at least part of the survey (1,155 completed the entire survey). All percentages reported are based on those answering each question separately. The response rate for known delivered emails was 29% (1,258/4,365). Given the nature of the sampling frame used for the study, no margin of error has been computed.

Arts Organization Online Survey Sample Breakout	
Invited to participate	5,773
Known undelivered emails	1,408
Delivered email invitations (at most)	4,365
Unique visitors to the survey	1,291
Responders (i.e, answered any question)	1,258
Completed surveys (i.e., answered all questions)	1,155

The survey was typically completed by the organization's Executive Director (36%), or a director-level staff member (40%). However, 22% of respondents listed their role as "other," which included such open-ended answers as General Manager, Grants Officer, Curator, Event Coordinator or Academic Chair, or answers like "I am both Executive Director and Artistic Director." This reflects the nature of many nonprofit arts organizations where staff members are playing multiple roles, or have more descriptive professional titles. The majority of respondents (81%) said that they were answering questions on behalf of an entire organization. For the remaining 19%, their answers represented a segment or division of a larger institution such as a college/university or federal/state/local government.

Arts Organizations Represented in the Survey

The survey results presented here are *not* based on a probability sample of arts organizations currently operating in the U.S., yet every effort was made to administer the survey to as broad a sample as is practically possible. The 1,258 NEA grantees who participated in the survey represent mainly the nonprofit arts sector, yet comprise a very diverse sample of organizations. The final sample includes respondents from a wide range of disciplines, including visual arts, music, theater, dance, literature, photography, and media arts.

Organization Type

Organization Type	
Nonprofit	84%
College or university	10
State or local government	4
For profit	*

An asterisk (*) indicates a value of less than .05%.

Organization's Main Discipline

Organization Main Discipline	
Visual arts	13%
Music	13
Theater	12
Interdisciplinary	10
Dance	9
Media arts	7
Folk/Traditional arts	6
Literature	6
Photography	6
Design	4
Humanities	4
Crafts	3
Opera	3
Other	4

Asked to describe the main function of their organization and the services that it offers, NEA research experts say the answers suggest that the survey represents a broad cross-section of the U.S. arts field. Organizational functions include performance, curation, exhibition, education, and philanthropy.

Organization's Main Function

Organization Main Function	
Performing group	22%
Arts service organization	14
Art museum	9
Arts center	8
Arts council/agency	6
College/University	3

Performance facility	3
Cultural series organization	3
Community service or social service organization	3
School of the arts	2
Fair/Festival	2
Media-radio or television	2
Gallery/Exhibit space	1
Cinema	1
Literary magazine	1
Independent press	1
Library	1
Arts camp/institute	*
Foundation	*
Other	17

An asterisk (*) indicates a value of less than .05%.

Source: The Pew Research Center's Internet & American Life Project Online Survey of Arts Organizations, May 30 to July 20, 2012, n=1,258 arts organizations.

The services provided by these organizations range from curating performances to conducting arts education, media production, supporting the creation of art, and offering technical support and professional development to the arts community. Organizations could check more than one answer regarding the services they offer, and most respondents said their organization provides many of those asked about. Far from focusing on a single task, 49% of respondents report that their organization provides between 4 and 7 services. And, 16% of organizations indicate they provide 10 or more different arts-based services.

Services Offered

| Services Offered	
Public performance	12%
Arts creation	11
Arts instruction	9
Public education/Public awareness	9
Professional development/training	8
School/Residency	7
Exhibition	6
Fair/Festival	5
Professional support – artistic	5
Publication/Broadcast	4
Seminar/Conference	4
Historical preservation/Conservation/Repair/Restoration	3
Recording/Filming/Taping	3
Technical assistance	3

Professional support – administrative	2
Identification/Documentation	2
Distribution	2
Regranting	2
Evaluation	2
Operating support	1
Other	1

An asterisk (*) indicates a value of less than .05%.

Source: The Pew Research Center's Internet & American Life Project Online Survey of Arts Organizations, May 30 to July 20, 2012, n=1,258 arts organizations.

Nearly three-quarters (73%) of individuals participating in the survey represent organizations that have existed for more than 20 years, and another 19% represent organizations that have existed for 11 to 20 years. Only 21 organizations represented in the total sample (2%) have less than five years of history.
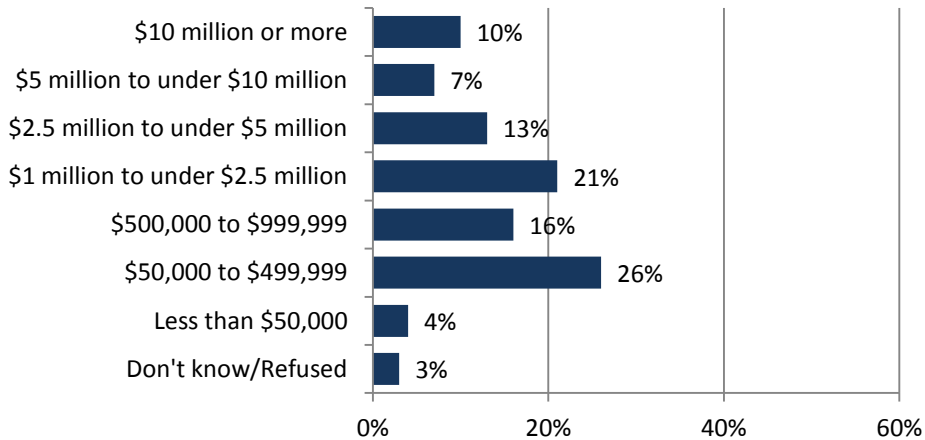
For how many years has your organization existed?
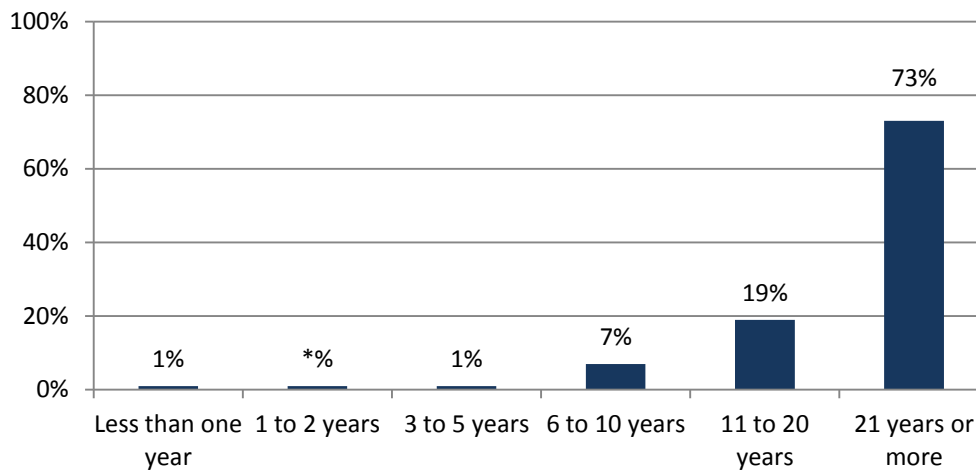
Source: The Pew Research Center's Internet & American Life Project Online Survey of Arts Organizations, May 30 to July 20, 2012, n=1,258 arts organizations. An asterisk (*) indicates a value less than .5%.
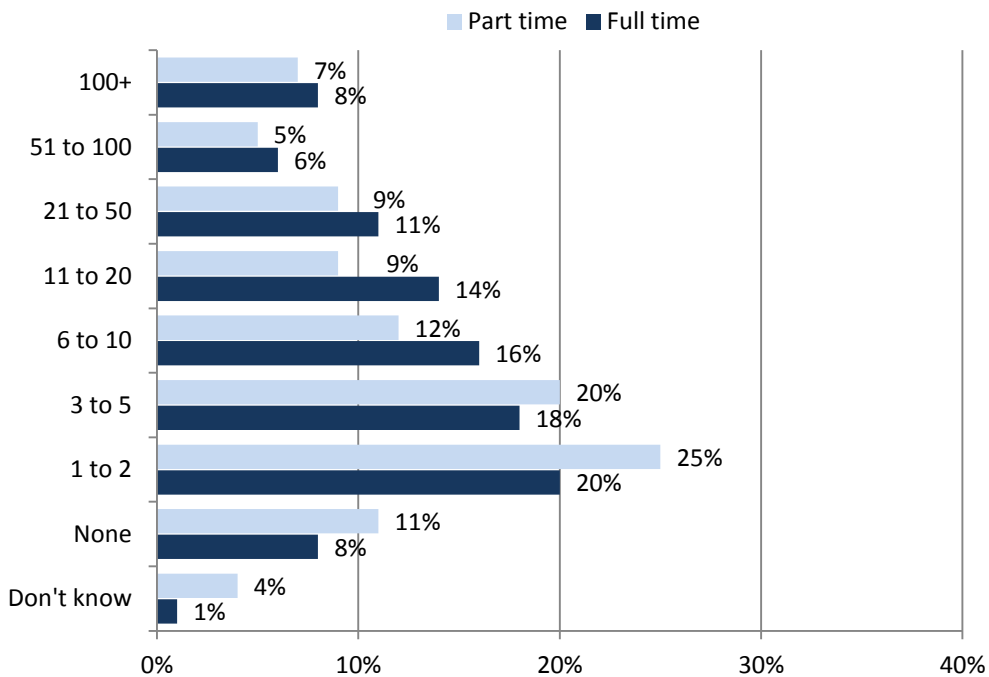
The final sample also includes organizations of all sizes, from very large to very small, with widely varying operating budgets and staff size. Organizational budgets among this group range from less than $50,000 to $10 million or more annually, with the highest proportion in the $50,000 to $499,999 range. Despite these notable differences in organizational budgets, the majority of arts organizations that participated in the survey have a small staff: 68% of organizations have 10 or fewer full time employees, including 45% that have between one and five full-time employees.

Organization's current annual operating budget

Budget	Percentage
$10 million or more	10%
$5 million to under $10 million	7%
$2.5 million to under $5 million	13%
$1 million to under $2.5 million	21%
$500,000 to $999,999	16%
$50,000 to $499,999	26%
Less than $50,000	4%
Don't know/Refused	3%

Source: The Pew Research Center's Internet & American Life Project Online Survey of Arts Organizations, May 30 to July 20, 2012, n=1,258 arts organizations.

Number of employees

Number	Part time	Full time
100+	7%	8%
51 to 100	5%	6%
21 to 50	9%	11%
11 to 20	9%	14%
6 to 10	12%	16%
3 to 5	20%	18%
1 to 2	25%	20%
None	11%	8%
Don't know	4%	1%

Source: The Pew Research Center's Internet & American Life Project Online Survey of Arts Organizations, May 30 to July 20, 2012, n=1,258 arts organizations.

The final sample included arts organizations from every state, the District of Columbia and Puerto Rico. States with the largest percentage of respondents included New York (17%), California (14%), Illinois (5%), Pennsylvania (5%), and Texas (5%).

Asked to describe the community in which their organization is currently based, 70% say they are situated in an urban center. However, answers to subsequent survey questions suggest that arts organizations are using technology to stretch beyond these time- and place-based constraints, with some serving not only their immediate locale, but also communities all over the country and world. For example, when asked about the geographic location of their patrons, more than half of the organizations in this sample serve either a local (29%) or regional (29%) audience. Yet another 17% have a national audience, and 13% serve an international community. Some 11% of organizations said they serve a virtual or online community.

Which *best* describes the type of community in which your organization is located?

Community Type	
An urban center	70%
A small city or town	16%
A suburb near an urban center	8%
A rural area	5%
Virtual or online organization only	1%

Source: The Pew Research Center's Internet & American Life Project Online Survey of Arts Organizations, May 30 to July 20, 2012, n=1,258 arts organizations.

Is the target audience for your organization's services …

Audience Type	
A local audience	29%
A regional audience	29%
A national audience	17%
An international audience	13%
A virtual or online audience	11%

Source: The Pew Research Center's Internet & American Life Project Online Survey of Arts Organizations, May 30 to July 20, 2012, n=1,258 arts organizations.

Moreover, the arts organizations that participated in the survey are serving nearly every age group, from very young children to elderly adults. Seventeen percent say they serve patrons of all ages.

Does your target audience include ages...?
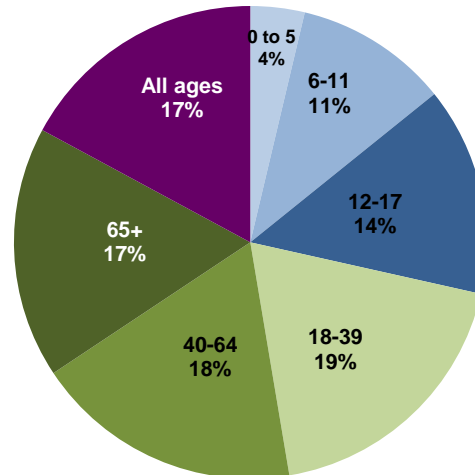
0 to 5
4%

6-11
11%

12-17
14%

18-39
19%

40-64
18%

65+
17%

All ages
17%

Source: The Pew Research Center's Internet & American Life Project Online Survey of Arts Organizations, May 30 to July 20, 2012, n=1,258 arts organizations.

Interpreting the results

The arts organizations participating in this survey represent a healthy cross-section of the American arts and culture landscape. They vary considerably in their overall function, the services they provide, the disciplines they promote and support, and the audiences they serve. They also range from the very small to the very large, their location, and the community types in which they are located.

Yet, because they consist entirely of organizations that have received NEA funding in the past five years, they are likely distinct in some ways from the full population of arts organizations currently operating in the U.S. Most notably, this sample is made up of mainly nonprofit organizations (84%), and arts organizations with a fairly long history (73% have existed for 21 years or more). One can conclude due to the length of time they have existed and their ability to procure NEA funding that these are relatively successful organizations when it comes to the grant process. One in 10 participating organizations report an annual operating budget of $10 million or more, which would place them at the highest end of the budgetary scale. And while the majority of organizations participating in this survey have only a handful of full-time employees, 14% have more than 50.

Thus, in interpreting survey results, one should keep in mind that organizations that are less successful in obtaining funding in general, and NEA funding in particular, are likely not part of this sample. The sample also likely skews toward older, more established arts organizations which may be very different from newer organizations or organizations that open and close quickly as part of the natural "churn" in the arts field.

How their relative fundraising success and organizational stability impact survey results is unclear. On one hand, these organizations may be more forward thinking and innovative in their use of technology, because they are successful fundraisers and are more likely to have capital to invest in

new projects and initiatives. However, their organizational longevity may work against this type of innovation if they have established organizational practices or audiences that are resistant to change.

Regardless, this sample of arts organizations promotes engagement across the arts, serves all types of artists and audiences, and represents all regions of the country and audiences of all ages. And though most report being located in urban centers, three in ten (29%) operate in smaller communities. Thus, their insights provide a comprehensive look at how today's arts organizations are using the internet, social media, and other digital technologies to further their missions.