DIGITAL CULTURE - A REVIEW OF EVIDENCE AND EXPERIENCE, WITH RECOMMENDATIONS FOR UK POLICY, PRACTICE AND RESEARCH

Findings and recommendations from an AHRC-DCMS Fellowship in Digital and International (2022-2024)

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*This research was developed and produced according to the author's hypotheses and methods. Any primary research, subsequent findings or recommendations do not represent UK Government views or policy.

Contents

Glossary of abbreviations and acronyms

Acronym	**Full text**
ACE	Arts Council England
AHRC	Arts and Humanities Research Council
AI	Artificial intelligence
ALB	Arm’s length body/bodies
ARIs	Areas of Research Interest
BEIS	Department for Business, Energy and Industrial Strategy
BIS	Department for Business, Innovation and Skills
CCIs	Cultural and creative industries
CDRN	Culture Data & Research Network
CCS	Creative and Cultural Skills
DCMS	Department for Digital, Culture, Media and Sport (2017 to 2023) Department for Culture, Media and Sport (February 2023, digital moving to DSIT)
DCN	Digital Culture Network
DSIT	Department for Science, Innovation and Technology
EU	European Union
ICT	Information and communication technologies
IP	Intellectual Property
NPO	National Portfolio Organisation of Arts Council England
R&D	Research and development
SDGs	Sustainable Development Goals
UKRI	UK Research and Innovation

Key definitions: digital for the cultural sectors

Term	Definition
Cultural sectors	Used in this report as shorthand for the arts and culture subsectors of the creative and cultural industries (CCIs). If it refers to sectors, it means cultural by default. More specifically, the research focused on the following areas: Theatre, Dance, Music (including classical music), Performing Arts, Visual Arts and Museums. Given that research on digital and the CCIs more broadly is more advanced, this research reflects on these policies and findings and their relevance and application to the arts and cultural sectors.
Digital activities	Across UK cultural sectors, these include the digitalisation of business operations, including accounting, box office and HR; the digitising of cultural products (such as online museum collections), production (such as virtual reality immersive theatre) and dissemination (such as the online streaming of dance performances); and the digitalisation of access to culture. Some find it helpful to distinguish between administrative vs creative or 'mission-driven' activities.
Digital culture	Used in this report to primarily refer to the creation, consumption, production and dissemination of arts and culture using information and communication technologies (ICT). Elsewhere the term digital culture is used to describe how we live our lives online more generally, but that is not how it is used in this report.
Digital divide	Most easily described as a gap between those who have adequate access to digital technology, such as the internet and ICT, and those who do not.
Digital exclusion	Accounts for the digital divide, as well as issues of literacy, confidence and concerns around online safety.
Digital innovations	In the evidence base, digital innovations relate to the innovative potential of digital culture, and this is often used as a synonym for digital activities that are not necessarily innovative and presumed to be wholly positive.
Digital maturity	Understood as an individual's or organisation's capabilities to understand, use, manage and develop, digitally. Using established business process maturity models as a starting point, a range of self-assessment tools have been developed that are intended to enable organisations to evaluate their digital maturity. The implication is that a high level of digital maturity is a desirable aspiration.
Digital transformation	While definitions differ, they tend to assume a positive process of digitalisation. In the case of digital culture, it can refer to more than just activities, including mindsets and outcomes.
Digitalisation	The development of digital processes to replace non-digital (that is, manual or analogue) ones.
Digitisation	The digitising of something or turning something analogue into something digital (such as converting and recording data, artistic productions or archives).

1. Executive summary

1.1. Rationale for this research

The UK cultural sectors are increasingly impacted by digital technologies, and with differing effects. The COVID-19 pandemic prohibited in-person activities, resulting in an upsurge in online work and leisure that has come to be known as the digital pivot. Policymakers, researchers and cultural sectors have been keen to maximise on innovations and sustain learning from this time. This report shares findings and recommendations from research which aimed to understand digital activities across the UK cultural sectors and its potential for improved engagement with international and domestic audiences.

This research follows recommendations from the 2021 'Boundless Creativity' report, published by DCMS and the Arts and Humanities Research Council (AHRC), to commission further research to improve understanding of digital opportunities for the UK cultural sectors, particularly in relation to international audiences and the role of innovation in shaping cultural experiences during the pandemic.

This report is published some three years later following indications that the digitalisation of cultural sectors' activities is not on a stable upward trajectory towards what is known as 'digital transformation' or 'digital maturity'. Crucially, not all UK cultural activities need to, or should be digitalised. There are complex, intersecting barriers to digital engagement, which, together with the uneven distribution of resources, inhibit the continuation or expansion of what were seen to be digital innovations. Together, these limitations compromise the potential of digital innovations in expanding UK culture's domestic and international reach. It is therefore important that research, policy and practice on digital culture account for these challenges.

The early scoping phase of this research responded to the recommendations of 'Boundless Creativity' (DCMS, 2021), while also synthesising substantial primary research in this field that superseded it. Responding to this, the author designed an 'embedded evidence review' as an 'embedded researcher' with unique access to people and evidence from the sectors and DCMS. The review included over two hundred items of published and unpublished information, research and evaluations. The research also drew together insights from across the cultural and digital sectors, academics, industry researchers, government and non-governmental policymakers.

1.2. Headline findings

1.2.1. A lack of a shared understanding of digital culture is a barrier to effective digital cultural policy

Digital culture was a problematic term for some interviewees. The word digital holds varied meaning, value and importance across UK cultural sectors and funders. This lack of a shared understanding is a barrier to effective policymaking. Now that digital policy has moved from the remit of DCMS to the new Department for Science, Innovation and Technology (DSIT), this is a good time to review digital possibilities for culture policymaking and to improve understanding of digitalisation efforts, and data on innovations in digital culture.

1.2.2. Research on digital culture does not yet fully account for knowledge gaps, or incorporate audience experience or international demand, limiting policy design and influence

Understanding of the experience of digital culture remains limited, compared with that of analogue, live or in-person experiences. Research and informal insights, where these exist, do not always lead to wider learning. There is a wealth of anecdotal but little empirical evidence about what international audiences want and need from UK culture, and we lack meaningful data about domestic audiences and digital engagement.

1.2.3. Digital policy can directly and indirectly include and affect UK cultural sectors, but intention is not always explicit, limiting impact and learning

Strategies and policy documents have long linked culture and digital as areas of joint concern. However, not all digital strategies refer to cultural activities or have explicitly benefitted them in practice, even when there are many cross-cutting priorities affecting growth and international reputation. Clarity and consistency have been lacking regarding the implications of digital policy for culture, who and what it is for, and how it might overlap with media and international policy. The cultural sectors' capabilities to respond, mitigate against or benefit from digital policy are therefore limited.

1.2.4. Existing support for digital culture is valued, but diverse support mechanisms could be better evaluated, scaled and more joined up

Current support for digital culture is generally favourably received by the sectors, according to interviewees. Yet there is a tendency to value new initiatives. Prior digital investments are not systematically evaluated or tested at scale to enable good planning or the informed development of a digital infrastructure. This also compromises systematic and targeted, tailored digital funding for culture. These needs are particularly necessary to sustain innovation after the post-pandemic 'digital pivot'.

1.2.5. Research and recommended good practice tend to prioritise digital maturity or digital transformation case studies from large, high-profile institutions, limiting sectors-wide impact

Smaller-scale digital developments across the sectors are often overlooked, resulting in a misunderstanding of the pace of evolution overall. Digital maturity or digital transformation as concepts work for larger institutions, but do not necessarily describe resilience in the face of wider social change. One-size-fits-all approaches can be hard to apply, and then evaluate, especially at a project-level. Evidence on successful, sectors-wide digitalisation strategies and interventions are therefore under-developed.

1.2.6. Skills for a sustainable and resilient cultural infrastructure that embraces digitalisation are not all being prioritised

Skills research and development prioritises existing workforce mapping methods and should be more future-oriented, incorporating the dynamic demands of digitalisation. Alongside obvious creative digital skills, provision of analogue skills that are lacking for high quality content production and dissemination are needed. Similarly, a skilled digital workforce needs to include data and AI literacy, business intelligence on Intellectual Property (IP), and international platform and media regulations and legislation.

1.2.7. Aspirations to reach, attract, include and engage audiences, internationally and domestically, must be better articulated

Reaching audiences through dissemination is not the same as attracting them, including them or indeed engaging them. Similarly, the relationship between digital and access is more complex than accounted for. A lack of clarity limits the success of investments and interventions.

1.2.8. The UK's ambitions for international cultural policy lack clarity, and this has implications for priorities around digital culture

Whether focussing on soft power, international cultural relations or diplomacy, accuracy is needed in the terminology used across policy that informs international digital activities. This has implications for the type of outcomes desired and inevitably to be delivered by and through the UK's cultural sectors.

1.3. Headline recommendations

Two overarching recommendations emerge from this research:

1. Develop an explicit digital strategy for the cultural sectors, and,
2. Facilitate research and consultation needed to inform its successful development, delivery and evaluation.

Delivering on these recommendations requires extensive and joined-up partnership working, as acknowledged by previous recommendations (see, for example, DCMS, 2018a and 2021). The UK Government, arm's length bodies (ALBs), research funders and institutions, and the cultural sectors themselves need to collaborate from the outset. The breadth of the research and policy areas relevant to digital culture indicate that without intervention they will remain siloed and unaligned. Not addressing these silos risks limiting the cultural sectors' potential to attract new audiences, and their capacity to innovate, both domestically and internationally.

This report recommends an explicit digital strategy for the UK cultural sectors that incorporates domestic and international demands and settings. Previous attempts to centre the connections between culture, digital and international policy have not resulted in explicit digital policies for culture and/or international engagement. A digital strategy for the UK cultural sectors must commit investment into an expansive, flexible, joined-up and reflective programme of research and consultation, designed to directly inform strategic and rigorous policy and support mechanisms.

The full recommendations section of this report shares detailed sub-recommendations to shape the strategy, any associated policy, as well as the research that should inform it. In summary:

1. Create an explicit digital strategy for the cultural sectors
    a. Define "digital culture" and make digital recommendations explicit. Greater clarity is needed on what is meant by 'digital' when used in funding calls and policy messaging.
    b. Address current and future digital needs in a way that acknowledges limitations and complexity.

c. Establish support mechanisms that are structured from the outset to reflect on what has not worked. Refusal to recognise limitations or failure in evaluations limits the success of continuing or future interventions.
d. Set realistic ambitions that connect the sectors' needs, mindsets and ambitions with governmental priorities. These must reflect the diversity of digital activities, the sectors and their audiences, and acknowledge changing consumption patterns.
e. Centre cultural sectors' experiences in digital policymaking. People (whether artistic, administrative or audiences) should be at the heart of digital culture infrastructure and skills development.
f. Ensure a skilled workforce for sustainable cultural infrastructure. This requires a re-evaluation of what a digital skill is, to include analogue, business and regulatory concerns.
g. Acknowledge the differing priorities needed to bring digital culture to domestic and international markets. Domestic policy aims of access and levelling up do not immediately translate to an international policy focus.
h. Ensure shared responsibility for a research mechanism in support of the proposed digital culture strategy's aims and objectives. Following on from prior successes, including 'Boundless Creativity', this should incorporate arts councils, research councils and government.
i. Future proof the digital culture strategy to incorporate potential AI and legislative/regulatory changes. AI was outside of the scope of this research, but a future-proofed strategy must account for AI potentialities in terms of labour markets, efficiency and ethics.

2. Commission research on the value, meaning, challenges and opportunities of digital activities across cultural sectors' stakeholders and geographies.
   a. Support the development of future policy and digital practice by evaluating 'what works' in digital cultural initiatives. Identify current and future needs and opportunities through reflections on what has not worked and encourage and champion 'best practice' across the wide diversity of cultural sectors and scales of ambition. Evaluations of current support mechanisms must improve to account for failure or average achievement and reflect on past successful digital support mechanisms.
   b. Funders such as UKRI and the AHRC should address existing recommendations calling for further research, monitoring and evaluation, and account for existing limitations. This should include improving ways to review evidence available and methodologies for assessing digital participation and engagement, while addressing known research gaps by alignment across research institutions.
   c. Capture good practice from across the cultural sectors in a 'people-first' approach. Research and evaluation must listen to a diversity of voices for what unusual, atypical and/or unobvious success stories can teach organisations of all sizes.
   d. Consider the implications of digital technologies for the wider cultural sectors' stakeholders. Research about digital culture needs to account for the good and bad effects of digitalisation.
   e. Isolate and refine use of concepts that are used interchangeably: reach, engage, attract and access, similarly cultural relations, diplomacy and soft power. Without consistent use, intention is unclear, and the impact of digital culture is hindered, as is understanding on how UK attractiveness, for

example, might be linked to mechanisms to attract international audiences, or vice versa.

f. Commission research into the complex and dynamic legislative and regulatory frameworks of international digital, technical and media policy. Aspirations for UK digital culture must be better informed by the complex barriers to international reach.

2. Introduction

2.1. Scope

To understand digital innovations for the UK cultural sectors and how they enable engagement with international and domestic audiences, this research centred on digitalisation alongside several sub-themes: innovation, infrastructure and structural / sectoral barriers. A final sub-theme, international, relates to opportunities and challenges for UK culture to reach, attract and engage international audiences in general, rather than focussing on countries or regions of interest. Observations and findings about domestic audiences remained within focus, given their importance.

2.1.1. A note on AI

Artificial intelligence (AI) is largely outside of the scope of this research, which was designed in 2021-22. While AI featured in the reviewed evidence and the interviews, it was not a central theme, as many of the implications surrounding its use are still emerging (DSIT, 2024). The future digital strategy and accompanying research recommended by this report must consider both the positive and negative implications of AI, for example, IP, job security, ethics, fair pay, discrimination and bias (see for example Yogesh and others, 2021).

2.2. Methodology

This report is informed by a programme of embedded research conducted between June 2022 and June 2024. This includes the collection, aggregation and analysis of approximately two hundred pieces of published evidence, as well as unpublished papers and evidence from DCMS, and additional unpublished evidence that was shared by other stakeholders with the researcher. It is also informed by time working within DCMS and 20 interviews with sector and policy representatives. A sectors-wide survey was considered to try and improve evidence of digital activities across the cultural sectors but was not taken forward due to the number of overlapping surveys being conducted during the scoping phase (2022) and concerns regarding survey fatigue across organisations and individuals. It was important to avoid replicating similar data collection with the sectors that duplicated previous efforts for at least two reasons; 1, because it is unethical and unrealistic to expect organisations to participate at a time they are under pressure, and 2, this may skew findings towards the perspectives of certain organisations who may already be over-represented in prior consultations.

For this reason, the approach taken maximised the distinct position of being on a placement inside the UK Government. Being an embedded academic researcher inside DCMS and across the sectors enabled atypical access to information to help answer the research questions, as outlined in more detail in the detailed methodology in the appendix.

3. Background to the research problem

Supporting digital innovation in the creative industries is a UK Government priority (UK Parliament, 2022) and supported by prior research that reflected on post-pandemic resilience and recovery (for example, DCMS, 2021). It is, however, a complex problem for a variety of reasons.

UK cultural policy has long been linked with digital policy, especially that with a focus on the cultural and creative industries (CCIs). There have been numerous attempts to understand how the COVID-19 pandemic affected these sectors and how digitalisation may increase resilience in the face of subsequent and continuing external shocks and related social and policy issues. These include access to culture for people on low incomes, who live in remote areas, or with disability needs, alongside environmental concerns regarding the sectors' carbon footprint and fuel costs.

The existing research into the possibilities of digitalisation has not always accounted for the complexities of policy-making realities. These include the information, digital and infrastructural barriers for domestic and international audiences and organisations. Or, indeed, the complex cross-national regulatory and legislative frameworks surrounding digital and media policy.

The potential of digitalisation to bring UK culture (and values) to wide international audiences, and fulfil soft power or cultural diplomacy goals, is increasingly important in a shifting geopolitical context. Explicit digital policy, excluding media regulation but including media literacy, has moved to DSIT from DCMS (2023). Much focus on digital policy is on AI or online harms, often excluding IP and other international digital media concerns. The current UK Digital Strategy (DCMS, 2022a) has few explicit references to culture, placing less emphasis on digital technologies for improved access to cultural offerings than previous digital strategies. It is thus a critical time to review what digital in cultural policymaking could and should be, and its relationship to media and creative industries, internationally. Definition and clarification of what is meant across these areas will improve a shared understanding between policy areas, and the government and the sectors.

3.1. Digital culture: growth, access, resilience and sustainability

The COVID-19 pandemic prompted much discussion and research on digital technologies and opportunities for the cultural sectors, building on a growing interest in the opportunities afforded by digitalisation. For many sectors, the pandemic response centred on a need to maintain income, but people working across cultural sectors felt a moral obligation to protect access to culture, both internationally and domestically.

The pandemic prohibited in-person cultural participation, the primary way UK cultural sectors interact with audiences. To maintain contact and engagement, cultural organisations and creatives began producing more digital content and extended digital dissemination and communication. Often referred to as the digital pivot, this is described as an "intense period for digital engagement" (Welch, 2022). This acceleration in digital culture happened at a time of broader changes in resource (human and financial), audiences (international, domestic and local), skills (Kidd and others, 2021) and the shift of labour and leisure onto digital platforms as part of what is commonly known as lockdown. Take-aways from this time span policy domains and problems, across domestic and international audiences, place and levelling up (Welch, 2022), inequality and business models, and are noted for the numerous learnings possible for policy and practice that resulted (Welch, 2022).

Following the COVID-19 pandemic lockdowns, digital culture has been highlighted as a priority for cultural sectors, related research and for sectoral recovery (DCMS, 2021). 'Boundless Creativity' was one of the most high-profile research collaborations conducted throughout the pandemic, a partnership between the AHRC and DCMS (DCMS, 2021). It examined the role of innovation in shaping the recovery, renewal and future growth of the UK's cultural and creative sectors.

The report states that "cultural organisations have adapted and innovated to sustain our national life when we have needed them most" and "new partnerships between the digital and cultural sectors have driven new forms of innovation" (DCMS, 2021: 4). It made recommendations to "allow the sector to maximise the potential of new digital and immersive technologies in engaging and diversifying audiences" (DCMS, 2021: 2). It also wanted to "identify how the cultural and creative sectors can innovate…to build resilience against future shocks" (DCMS, 2021: 2). The report is one of numerous research outputs from that time that praised the sectors' innovative digital responses to COVID-19 pandemic lockdowns and the increase in new audiences.

Following the publication of the Boundless Creativity' report and the post-lockdown return of in-person audiences, new research findings have brought the sustainability of these ways of working into question (see, for example, Kidd and others, 2021; Walmsley and others, 2022; National Lottery Heritage Fund, 2022). They also question the extent to which expanded digital activities increase audience diversity (Feder and others, 2022; Misek and others, 2021; The Audience Agency, 2020; Aebischer and Nicholas, 2020), meet international audiences' preferences for in-person engagement and point to the realities of delivering expensive high quality digital production (Myrczik, 2022). As noted in a UK Parliament publication, "Pre-pandemic inequalities affect how artists and organisations use digital technology" (2022). Consequently, as cultural audiences returned to in-person cultural participation, organisations "restart[ed] their pre-pandemic business models" (Runacres, 2022; Walmsley and others, 2022) leading to questions about the relationship between innovation, resilience and inequality and suggesting that the digital pivot was not wholly sustained.

3.2. Digital social and cultural policy beyond the COVID-19 pandemic

While the impacts of the pandemic are still felt, the sectors are reprioritising to accommodate subsequent and continuing external shocks, such as the cost of living crisis.[1] It is important to note that these crises follow a longer period of adjustments to investment and infrastructure subsequent to the financial crisis of 2007-8 (Hesmondhalgh and others, 2015; Oman, 2021), impacting on cultural production (Di Novo and Easton, 2023), research and development, ALBs (Oman and Taylor, 2018) and individual organisations (Jowett and Stone, 2024). Given the cultural sectors' differing capacity and requirement for digital innovations (MTM, 2019), this research area is complex, and questions must be asked as to whether digital innovation is the best route to assuring sectors-wide resilience.

The COVID-19 pandemic's impact on digital and cultural policymaking aligns with discussions on how digitalisation may address other crises and social policy issues to do with access, engagement and inclusion. Digital production is seen as an effective means for those with limited mobility or who live far away from a cultural venue or with inadequate transport to access culture (Misek and others, 2021). New data, technologies and

[1] For example, as recognised in Arts Council England's extension of the 2023-2026 National Portfolio Investment funding by one year (Arts Council England, n/d.a).

methodologies also enable the tracking and monitoring of sectoral emissions and activities to aid the wider understanding of possible actions and their urgency against other priorities.

Digitalisation has its own negative climate impacts, however.[2] Digital data and technologies rely on vast amounts of energy and water to cool data centres and on raw materials (such as lithium batteries) with adverse ecological effects. Their extraction also has negative impacts on societies, predominantly in the Global South, which also often receives the significant electronic bi-products or waste produced. Therefore, how UK digital culture interacts with international policy priorities and sustainability concerns must be considered.

3.3. International reach: cultural diplomacy, soft power and audiences

The ‘Boundless Creativity’ report recommended a “new collaboration between AHRC and DCMS to understand and unlock the potential of reaching new global audiences digitally” (DCMS, 2021: 6). However, it also noted the “mixed results” of streaming content as a sustainable alternative to live performance as the investment was significant and returns were not as high. Reaching new audiences is of interest for economic reasons, but trade and export also enable other levers that are more cultural, social and political.

The 2018 ‘Culture is Digital’ report sets out in explicit cultural diplomacy or soft power rhetoric the government’s priority to “project [the UK’s cultural offer] to the world as we prepare to leave the EU” (DCMS, 2018), later emphasised by The British Council All Party Parliamentary Group (2020). Soft power is understood as the leveraging of a nation’s attractiveness for international influence (Nisbett, 2016). The phrases cultural diplomacy and cultural relations are used interchangeably (see, for example, European Union External Action Service, 2016) to refer to the exchange of ideas, values, traditions and other aspects of culture or identity, to strengthen relationships, co-operation and promote national interests. Yet the potential contribution of digital cultural activities to these similar yet nuanced mechanisms has been assumed, oversimplified and under-researched, despite the confident rhetoric and complexity of this field.

3.4. Conclusions

The UK cultural sectors have seen several external shocks, the COVID-19 pandemic being the most reflected on for its huge impact on the cultural sectors’ activities. It is important to maximise on learnings from the digital pivot and assess how they can be applied to future policymaking. However, the digital pivot is increasingly referred to as something in or of the past and the limits on its impact are increasingly acknowledged. Despite this, empirical understanding is limited of the slowing, de-prioritisation or cessation of digital activity that was categorised as innovative and/or critical to sustainability, as is how this may jeopardise the assumed promise of recovery, renewal and future growth.

The relationship between digitalisation and other aims, such as economic growth, internationalisation, resilience, levelling up and accessibility are assumed, but are they empirically sound for cultural sectors? How does one form of development intersect with wider sustainability concerns and international digital, media and technical infrastructures? It is particularly important, then, as digital activities are either reprioritised or scaled, that it is

[2] Despite the growing literature on these social impacts of digitalisation, they are currently under-discussed in cultural policy forums. For an introductory overview, see World Economic Forum, 2020. Work is beginning to better understand the sectors’ climate impact (see for example Julie’s Bicycle), but it is not yet developed enough to grasp the complexities of digitalisation.

clear to the sectors what the intentions behind government-supported international activity are. The frequent interchange of loaded terms such as international cultural (digital) relations, international cultural diplomacy and soft power present challenges in setting a direction of travel for the sectors and how it can support and deliver international ambitions.

The scope and focus of this research project are thus a timely outcome of the recommendations of the 'Boundless Creativity' project and significant in its attempt to address some of the core questions that remain following the digital pivot.

4. Findings

This section presents the full findings outlined in the headline findings in greater detail. Section 4.1 presents an overview of relevant digital cultural policy history, together with its meaning for UK cultural sectors and research, before exploring issues within digital policy: skills, inclusion and innovation. Section 4.2 focuses on audiences and cultural engagement. Section 4.3 sets out the complexities of international markets and cultural diplomacy. The section concludes with broader reflections on digital cultural infrastructure.

4.1. Digital culture

4.1.1. Digital cultural policy - a history

> The UK technology and cultural sectors make the ultimate power couple, but more action is needed to make sure that they share the same interests. (DCMS, 2018)

The above quote from ‘Culture is Digital’ is symbolic of a longer aspiration to link digital policy and cultural policy, which stretched back to New Labour’s Creative and Cultural Industries mapping (DCMS, 1998). But this linkage is not necessarily stable or static. For example, ‘Digital Britain’ (BIS, 2009) was co-published by the Department for Business, Innovation and Skills (BIS) and DCMS. Its declarations around building Britain’s digital future were less explicitly about culture.

Responsibility for digital policy changed again in 2017, when it left the Department for Business, Energy and Industrial Strategy (BEIS). For the first time, digital policy was formally within the remit of the newly combined Department for Digital, Culture, Media and Sport (DCMS). This was cemented with a new Digital Strategy (DCMS, 2017), that was “born out of the [UK] Government’s Culture White Paper [2016]” (DCMS, 2018: 8). The ‘Digital Culture Project’ resulted in an extensive sector consultation (see DCMS, 2018: 63) and the material for the subsequent ‘Culture is Digital’ report (DCMS, 2018).

While not a strategy, the latter report focused on the potential of technology to “drive audience engagement, boost the capability of cultural organisations and unleash the creative potential of technology” (DCMS, 2018: 8). It identified new international opportunities, including export, from existing and expanding digital activity (DCMS, 2018: 45). The Culture is Digital Progress report (DCMS, 2019) pointed towards barriers to digital capability-building, being “skills, literacy, fragmentation or funding” and that “the ask from all parties [was] for leadership, coordination and infrastructure” (DCMS, 2019). These asks are not so different from the findings of this report.

Despite this continuity, there has been no direct follow-up to ‘Culture is Digital’. The current UK Digital Strategy (DCMS, 2022), like the 2023 policy paper on digital regulation (DCMS, 2023d), has few explicit links to culture and less emphasis on digitalisation as a means of improved access to cultural content. Instead, cross-cutting priority areas that implicitly affect culture include IP, skills, financing digital growth, levelling up, and enhancing the UK’s position in the world (DCMS, 2022). Perhaps understandably, then, a 2023 report from the House of Lords strongly criticised the absence of the cultural and creative industries from wider government priorities, noting the risk this poses to future prosperity (Communications and Digital Committee, 2023a). In February 2023, responsibility for digital policy left the Department for Digital, Culture, Media and Sport, moving to the new Department for Science, Innovation and Technology (DSIT). This represents another shift in how digital and culture are managed as policy areas.

In June 2023, the refreshed DCMS published the Creative Industries Sector Vision, defining the creative industries as “those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property” (DCMS, 2023: 10). The report uses the term “the cultural sector” as a single subsector of the creative industries, whereas this report uses the plural “sectors” (DCMS, 2023: 10). The Sector Vision asserts that the UK’s creative industries are “at the heart of our increasingly digital world”, setting out their importance to international markets, competitiveness and soft power (DCMS, 2023: 4). The Sector Vision also points to overlaps between government definitions of the digital sectors and the creative industries (such as IT, software and computer services, and TV, radio and publishing), “exemplifying the importance of digital technologies to the creative industries” and acknowledging that this way of categorising the creative industries originated in the UK (DCMS, 2023).

Digital and cultural policy are, therefore, consistently linked in documents from different UK Government departments, especially via connection to the creative industries. However, the ways in which they are linked and unlinked is inconsistent, and this has an impact on governance and strategy. Interviewees noted that whilst ‘Culture is Digital’ (DCMS, 2018) implied it was, or could be, a digital strategy that was explicitly for culture, it had not necessarily served the sectors as well as it might. Extending on this point, it seems that in moving digital policy to DSIT, an opportunity for an explicit digital strategy that serves the UK cultural sectors has opened up.

There is not always a straightforward answer to whether policy documents and the evidence they draw from are explicitly or implicitly advocating on areas of digital for culture, and vice versa. There could be improved clarity between policy that lays out how culture may play a role in digital and international policy aims and that which lays out a strategy for how digital policy for culture could be improved. Similarly, there are documents which argue that one is good for the other, without necessarily foregrounding either, or in the case of the most recent digital policies, there can be a lack of explicit links to culture at all. This reinforces the need for clarity regarding what digital policy for culture is, and who / what it is for in policy documents.

4.1.2. The current meaning of digital culture to the cultural sectors

In order to understand the implications of digitalisation for the cultural sectors, it must be acknowledged that the word digital holds varied meaning, value and importance across stakeholders. This is something that is rarely at the foreground of policy literature but found in reflections from the sectors (see Unitt, 2018). Interviewees and the evidence indicate that the word digital, often used as shorthand and without specificity, is unhelpful, as it could entail a wide range of activities. These include business operations, such as accounting, box office and HR, as well as the digitisation of cultural products and the digitalisation of production and dissemination, including the broadening of access to culture through information communication technologies.

The overlapping applications of the term can be split into creative and administrative for ease of understanding (Unitt, 2018). Some interviewees also did this when discussing the complexity of the situation and implications for different functions of the cultural sectors. They argued that a lack of clarity hinders shared understanding among policymakers, between policymakers and the sectors, and within and across the sectors themselves. The policy and research problems related to the opportunities and barriers of digital activities for the UK’s cultural sectors are currently tackled in silos. One interviewee explained “digital is a trojan horse,” by which they meant that in investigating digital possibilities, current limitations in policy development and research, both domestically and internationally, will likely be revealed.

Understanding what digital culture looks like is also difficult. Digital and culture have been linked as ideas in policy documents (DCMS, 1998; 2018) and everyday experience for around a quarter of a century (Wright, 2022). Technological innovation frameworks have been applied to cultural institutions for at least half that time (Bakhshi and Throsby, 2012). Yet, what is meant by digital and what is meant by culture remains unfixed. Our understanding of digital engagements, even theoretically, is “a niche field [that] is notably scarce and sketchy” (Walmsley, 2016: 67). Furthermore, data about digitalisation efforts within cultural sectors in the UK has been described as “scarce and fragmented” (Alma Economics, 2023: 43), further compounded by differing understandings and data collection efforts.

4.1.3. Digital cultural policy research

The last ten years or so have seen digital culture receive increased attention as an element of cultural policy in domestic and international academic research (Wright, 2022), although its history is longer (Hesmondhalgh, 2002; Hylland, 2022). While digital cultural policy is not generally considered a field of research in its own right, it is generally understood as “the entanglement between digital technologies, culture, media, and public policymaking” (Hylland, 2022). This entanglement is, of course, what can be observed in the history of digital cultural policy itself.

Academic research attempts to understand this interlinking or entanglement, with some efforts embracing the complexities whilst also acknowledging some simple truths. For example, there is a difference between digital policy that directly affects culture and that which indirectly affects culture (Hylland, 2022). The complicated nature of digital and cultural policy has thus far received little attention, despite their ostensibly competing aims, with cultural policy often default managed as a form of social policy (Gray 2009; Oman 2021) and digital policy as a form of industrial policy (typified by the recently formed DSIT). UK cultural policy research is well respected internationally, according to one interviewee, and the complexities of UK digital cultural policy offer an opportunity for influence.

4.1.4. Current support mechanisms for UK digital culture

Support for UK digital culture varies in the degree to which this is explicitly for the cultural sectors (rather than the CCIs more broadly); whether it is focused on specific short-term projects, like developing organisations; or designed to build sustainable infrastructure. Therefore, it is not always clear what support for digital activities is aimed at reaching audiences, innovating in artistic production media or developing efficient business practices. By the same token, evaluating how these activities translate to international reach and engagement is currently lacking.

Mechanisms of support also vary, as the following examples demonstrate: the ACE-funded Digital Culture Network (DCN) offers webinars and tech champion support to organisations and individuals. The SPACE, a not-for-profit organisation funding the creation of new digital cultural content, also offers bespoke services to organisations and guidance on evaluating digital work, including IP and other business-related advice. They also worked on the Digital Maturity Index, guiding principles to help the sector capitalise on the opportunities of digital technology. The 2018 Creative Industries Sector Deal was a £120m investment, supported by the government’s Industrial Strategy and delivered by UK Research and Innovation (UKRI) in support of Creative Industries R&D, and immersive tech development for audiences. CoSTAR (Convergent Screen Technologies and performance in Realtime) is an estimated £75.6 million UKRI-AHRC research and innovation infrastructure investment, again to support technological developments in the digitalisation of the creative industries.

The Creative Industries Council (CIC) is a forum of government, creative businesses and other creative organisations that work towards improving trade and overcoming barriers to IP for all creative and media industries (not just the cultural sectors). More broadly, the Digital Economy Council is made up of trade members to offer advice to the government on building a digital economy. While financially well-resourced support exists, the way that support manifests is often quite abstract and high level, limiting sectoral engagement and comprehensive evaluation.

The sectors' perceptions of existing funding and support mechanisms vary. Interviewees largely responded favourably to specific, targeted initiatives when named, but indicated that overall support needed to be addressed. Programme evaluations are positive. Yet interviewees point to discrepancies between how success is reported, and what they and their peers perceive or experience from provision. One participant stated they were not sure evaluations even happened in this area. Notably, the independent evaluation of the DCN (SKW, 2021) is now only available as an executive summary at the bottom of a webpage called about the network (DCN n/d). The full report must be requested, suggesting more could be done in terms of accountability and transparency.

Identifying what support was available for what purpose was also a challenge. Interviewees indicated some awareness of assistance available to small organisations, but that they were unsure whether these resources were used as widely as intended, or clear on each support programme's remit and limitations. Interviewees felt unsure of longer-term outcomes from high-profile investments in digital developments, and that they heard sector colleagues express they felt that "these aren't for me."

Digital investments in the cultural sectors were, therefore, discussed with some suspicion. Those with large capital spends, flagship organisations or initiatives were presented as dominating funding and evaluation. This reflects the findings of the 'Digital Culture' report of 2019, in which the findings show a "gulf between the capabilities of large and of small organisations" (MTM, 2019: 6). Understandably, then, interviewees referred to their own experience that larger organisations that had invested in digital activities or innovation before the pandemic were far more likely to maintain these post-digital pivot, and smaller organisations much less so. These conversations reflect concerns in the academic literature of a digital divide emerging between cultural institutions.

Consider, for example, the differing capabilities and budgets within creative organisations of differing scales, as well as the need to think more deeply about diversifying and reaching wider audiences (see, for example, Misek and others, 2021: 5). There is a paucity of evidence that incorporates what Holcombe-James frames as "the impact of digital exclusion on institutions," noting that the larger and better-funded an organisation is, the better their capacity for digital (2022). Interviewees saw the need for improvements in support mechanisms to address this divide.

The message emerges that while support is not flawless, investment should continue into what exists with improvements in processes that embed reflection, evaluation and improvement. Interviews indicate that improvements could include reallocating or readjusting to better support smaller and less digitally-advanced organisations, and having clearer accounting lines to understand how investment in digitalisation is spent across engagement, production and business processes, and where in the country it is spent. The evaluation of the Digital R&D Fund for the Arts (MTM, 2016) noted the importance of avoiding vanity projects and fetishism for developing something 'new' in response to existing challenges rather than scaling what already works. Crucially, though, there are concerns that some support mechanisms are actually widening a digital divide between parts of cultural sectors, rather than addressing gaps as hoped.

4.1.5. Digital innovation, transformation and maturity

The ‘Boundless Creativity’ report pointed to adaptations and innovations that were sustained by new partnerships between the digital and cultural sectors. Furthermore, it claimed that in turn, these drove “new forms of innovation” (DCMS, 2021: 4). The aspiration being, of course, that these innovations could “build resilience against future shocks” (DCMS, 2021: 2). Working digitally was not an innovation in and of itself and interviewees pointed to work that has been ongoing to develop digital capabilities across the sector for longer as an aspiration.

Though definitions of these frequently-used terms vary, both high digital maturity ratings[3] and digital transformation are viewed as a desired end goal for cultural organisations. Research or development programmes often focus on one or both of these concepts and in doing so, encourage a mapping of the current state of affairs against an unclear ideal. Interviewees noted that both digital transformation and digital maturity can be hard to measure, especially given that their evaluation happens across diverse cultural contexts.

Where guidance is clearer on digital maturity and digital transformation, it may be relevant at the scale of organisations but less applicable to individual projects and flexible activities and unaccommodating of the multiple barriers at these scales. Changes or innovations may also be small and thus less valued by these evaluation processes, despite their contextual significance. The sectors face additional challenges in reflecting on what happened and its value, as well as reporting failure or limited success (Bakhshi and Throsby, 2012).

Following learnings from during the COVID-19 pandemic, there are calls to consider and address digital exclusion within the cultural sectors themselves using a digital inclusion framework.[4] This is more than timely, considering that the last UK Government digital inclusion strategy was published in 2014 (Communications and Digital Committee, 2023). Though research asserts that the digital pivot “achieved diverse accessibility and inclusion benefits for both organisations and participants” (Misek and others, 2021: 21; Morris, 2022), the accessibility or inclusion challenge is more complicated (Misek and others, 2021: 40) and too-little interrogated beyond acknowledging (some) positive benefits and one-size-fits-all solutions. As stated by KEA, “the mere fact that diverse content is accessible online, does not necessarily mean that audiences are exposed and have access to it” (2024).

Similarly, the type of innovation expected from cultural organisations in a digital and otherwise commercially-oriented context sets them at odds with the type of rhetoric used in government policy and strategy documents. Research into arts organisations’ business models has noted their key differences from typically commercial enterprises. This reveals that the economic, political, social and cultural contexts of an arts organisation often force them to implement several conflicting models that are not only financial, but also artistic, cultural and social (Rex and others, 2019). The longitudinal Digital Culture Survey showed an initial upward trend in the number of organisations who saw digital as important to their business models between 2013 and 2017, but this lost momentum by 2019, with fewer organisations acknowledging the importance of digital technologies to business models, compared to, for example, operations (49% and 74% respectively) (Nesta, 2019).

The extent to which digital can help address all business demands is thus more complicated in the cultural sectors: digital does not serve one need but addresses many or all concerns. Digital technologies are assumed to be enablers of innovation and growth in economic output (for example, United Nations, 2022) but this also comes with downsides. For

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[3] For example, like in the Digital Culture Compass tracker https://digitalculturecompass.org.uk/maturity-levels.

[4] See, for example, Holcombe-James (2022). While this empirical research took place in Australia, its findings and recommendations are valuable and comparable in the UK context.

example, while digital innovation is often seen at the individual creative level, the (financial) benefits are often felt by platforms rather than creators (United Nations, 2018: 16; see also European Commission, 2017).

Crucially, then, one might question whether the digital innovations that are frequently referenced as being brought about by the COVID-19 pandemic are really about scale of digital usage, rather than specific activities being particularly innovative in and of themselves. In other words, the digital pivot may have been novel, but did it actually lead to innovations? Some argue it revealed the extent of gaps in labour and skills that have yet to be addressed.

4.1.6. Digital and skills

There are calls for a cross-governmental focus on skills shortages in the creative industries (Communications and Digital Committee, 2023a). While the issue of digital skills gained prominence in the pandemic, addressing skills as a more generalised policy problem has been on the agenda for decades. In 2005, 25 sector skills councils were tasked with reducing skills gaps and shortages, boosting sector skills and promoting career routes such as apprenticeships and higher education.[5] The UK–wide organisation Creative and Cultural Skills (CCS) was one example, providing well-respected skills provision and infrastructure, especially for younger people.

CCS also conducted sector surveys. Interviewees positively referenced these data, highlighting how they helped fill gaps in data from other sources. These surveys collected insights on careers, access to work and skills, together with demographic data.[6] One interviewee from a devolved government noted the importance of CCS in understanding young people's access to digital infrastructure, alongside the realities of their training needs and physical accessibility of learning opportunities in rural areas of their country. This is also important, because the UK Government in Westminster and the Devolved Administrations in Scotland, Wales and Northern Ireland have different approaches to skills and education, including those that benefit employers and workers specifically in the digital content production sectors.

Further adaptations to funding are resulting in changes in infrastructure, such as the 2023 closure of CCS (Purfett, 2023). It has been noted that apprenticeships are underperforming for the CCIs (Communications and Digital Committee, 2023a) and that the closure of CCS is predicted to compound issues in a fragmented skills infrastructure, as will "catastrophic" A-Level and HE reforms (Lanre and Adams, 2021). While two key organisations in the area, The Audience Agency and Culture 24, recently left Arts Council England's national portfolio, their merger is a hopeful sign for UK cultural sectors that their combined digital culture offers are adapting to close skills provision gaps (Ward, 2023). This cannot be assumed however, and should be monitored. The Creative Industries Sector Vision's (DCMS, 2023) skills focus is well placed to shape the preservation of valued digital skills provision, and its development and improvement.

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[5] For more information on the sector skills councils and the CCS more generally, see Tambling 2023. Notably, funding for the sector skills councils was removed in 2010, at which point CCS was entirely reliant on ACE and other sector-specific funding.

[6] Unfortunately, subsequent to their closure, information on these datasets and data collection exercises have been removed from the public domain. One such example was last found at the following link: https://ccskills.org.uk/downloads/1370851494-A_Survey_Of_Theatre_Careers.pdf

Research outputs often propose one-size-fits-all skills models or solutions for what are presented as skills gaps.[7] Interviewees explained that these gaps do not necessarily reflect what people in the sectors want or need from upskilling. The question is then what these gaps represent. Highlighting the challenges at hand, for example, 'no data is available on digital skills of the workforce' in Wales (Alma Economics, 2023: 64). While the UK Government and other UK-based organisations, such as NESTA and the Creative Policy and Evidence Centre (PEC) have attempted to better understand digital skills, these mapping exercises often begin from a starting point of "what is a digital skill" (DCMS, 2023b), relying on an existing taxonomy or combination thereof.[8]

While improving our understanding of digital skills is crucial, mapping for gaps has methodological limitations, and struggles to capture the complexity of the situation. Crucially, it does not reflect the sectors' perspectives on the skills they need (Oman, 2019; One Further, 2022). It also does not account for the variety of skills required to future proof digitalisation across all areas. One interviewee explained that workforce changes were being observed but not accounted for; more specifically, a generation of expert camera workers were all retiring within a short period of time. Their skills were in demand to produce high quality digital content for international audiences and replacing these analogue skills was an urgent priority to deliver on digital aims. Others commented on the need for skills within organisations to deliver on digital strategies with an understanding of international media and platform regulation and IP. Notably after this research, it is clear that these skills must also include a tenacity for the ethical, social and technical implications of AI.

Together with UKRI, DCMS has prioritised academic research into skills development through a policy fellowship in 'Skills and Diverse Workforce'.[9] Similarly, the Creative Industries Sector Vision's subtitle is "a joint plan to drive growth, build talent and develop skills", and skills gaps are a major focus of the current Areas of Research Interest (ARIs) (DCMS, 2023b). However, these approaches do not appear to account for people's perceptions of need, upskilling or learning and development. They also do not seem to account for future proofing a digitalised cultural infrastructure that is robust and sustainable.

4.1.7. Digital, international and UK cultural policy

Empirical research into digital culture and policy often focuses on one nation. Comparative studies across nations are rarer (Hylland, 2022). Even within the UK, because arts policy is devolved, data differ across the four nations, affecting how UK cultural sectors can be understood. In policy terms, in addition to the priorities of the UK Government's different departments, international policy bodies and EU policy and sector actors. UK ALBs, such as the nation's arts councils and the British Council, have explicit aims and programmes for digital culture and its role internationally. It is difficult, therefore, to understand digital culture and international policy as a whole.

Prior to the current ARIs (DCMS, 2023b), their 2018 predecessors had two areas of priority in relation to digital: "research into evolving preferences and supply of culture due to technological innovations, in particular the role digital culture can play in reaching new and

[7] The current ARIs (DCMS 2023b) call for research to understand skills gaps and their identification, mapping and prioritisation.

[8] Examples include Olsberg SPI (2023: 87) which used 'a variety of sources…including the UK Screen Alliance Job Role Taxonomy, Ukie's 2022 Games Industry Census, StoryFutures' research and ScreenSkills' research and job profiles'. Bakhshi and others (2019) used job adverts to create a typology of digital skills.

[9] For more information, see https://gtr.ukri.org/projects?ref=ES%2FY003500%2F1

existing audiences" and "research into the impact of digital culture and levels of digital maturity and skills gaps".[10] These concerns remain but were rearticulated in 2023 to better understand impacts, effective interventions and capture developments in thinking since the COVID-19 pandemic and with specific reference to international, as well as domestic, audiences (DCMS, 2023b). This move from a generic reference to international audiences in 2018 to a more explicit consideration in 2023 suggests a more sophisticated consideration of the role of digital culture in international policy concerns. Yet the UK's 2023 International Technology strategy has no reference to the cultural sectors or wider creative industries (Foreign Secretary and the Secretary of State for Science, Innovation and Technology, 2023). Here is another example of the linking and delinking of digital and culture having implications, this time on international concerns.

That said, culture's potential value and intersection with international development, the fulfilment of the Sustainable Development Goals (SDGs) and inclusive growth is increasingly recognised (see, for example, United Nations, 2018; 2022; The British Council All Party Parliamentary Group, 2020). Importantly, this is finding a place in UK non-cultural policy-related documentation, such as a 2023 White Paper on International Development (Foreign, Commonwealth & Development Affairs, 2023). The same report highlights the value of cultural diplomacy where "other diplomatic avenues are closed," highlighting the nexus between development, diplomacy, culture and soft power yet failing to consider the possibilities of digital culture and scale.

To return to the issue of digital culture, there is also growing recognition that "international cooperation and dialogue' is key 'to maximis[ing] the benefits of digitalisation" (Ferencz, 2019). Further, this is crucial in a more diverse global cultural market. Yet, this area is not understood as well as it should be, and this impacts on the value placed on its development, especially if DCMS wishes to "drive growth, enrich lives [and] promote Britain to the world" (DCMS, n/d).

4.2. Digital cultural engagement, access and reach

4.2.1. Benefits and challenges for audiences

Bringing cultural engagement opportunities to places beyond the UK's "cultural hotspots" is key to current government priorities of levelling up (House of Commons Digital, Culture, Media and Sport Committee, 2023). While digitalisation has the potential to widen access and be more inclusive for distant, disabled, rural and international audiences (Misek and others, 2022), the provision of, and access to, digital technologies are unequal, a problem often referred to as the digital divide (Mihelj and others, 2019; Allmann, 2022) and one that is becoming increasingly more complex (Communications and Digital Committee, 2023b). Crucially, often those already marginalised, for example, by rural location or socio-economic status are also likely to have lower standards of connectivity, whether that is owing to full fibre broadband infrastructure, phone signal or the quality of hardware.

The impact of social and infrastructural barriers to people's online participation in society is called "digital exclusion" and remains a key concern for the UK Government's technological aspirations (Communications and Digital Committee, 2023b), especially amid reports that millions of Britons have had to cut their internet or mobile bills in the cost of living crisis (Walden, 2023, see also Communications and Digital Committee, 2023b). Digital participation in society for all is, consequently, an important aim of the UK Government and

[10] The previous ARIs (DCMS, 2018) have been deleted from public access, and replaced with new ones.

other international bodies (such as the UN).[11] Therefore, digital infrastructure is both an enabler and barrier to participation (Kristensen and others, 2022), with the potential to improve inclusion whilst exacerbating inequalities.

Understanding of how audiences (especially diverse audiences with varying needs) experience digital culture remains limited compared with that of analogue, live or in-person engagement. Pre-pandemic research points to these knowledge gaps (Walmsley, 2016) and a lack of appropriate research methodologies that limit our understanding of the qualitative difference between analogue and digital experiences. Big data analytics promise to improve insights, but these are especially limited for subsidised sectors, as they often rely on commercial data from ticket sales (Black and others, 2023). Interviewees noted that the sectors' reliance on third-party platforms to provide a digital cultural offer was another barrier to understanding of audience engagement. UK cultural sectors' standardised data collection, including ACE's NPO Annual Survey and DCMS's participation survey, have been recently amended to incorporate questions for collecting meaningful data on digital engagement. DCMS's Culture and Heritage Capital programme is one initiative which aims to address gaps in understanding the value of digital cultural participation, but the scale of the issue requires multiple approaches.

In 2023, DCMS published its new ARIs (DCMS, 2023b). These have a greater emphasis on digital cultural participation (outlined in the next section), indicating a commitment to deeper insights. However, it is important that we keep in mind the gulf of understanding of digital experiences as something qualitative, and not just a quantitative investigation of numbers, time online, location and revenue.

4.2.2. Domestic audiences

Over the past two decades, the UK cultural sectors have increasingly adopted technologies to engage with audiences (UK Parliament, 2022), and this appears to be taking effect. The 'Boundless Creativity' report noted that "two-thirds of Britons now think it is possible to have a meaningful cultural experience online" (DCMS, 2021). As well as new audiences, ambitions may include developing new cultural production methods that deepen engagement (UK Parliament, 2022). In other cases, removing key barriers to engagement (such as disability or geography) are the aim (Arts Council Northern Ireland, 2021; Misek and others, 2023). The effort, time and costs of travel have been noted as one of the largest barriers to cultural engagement. Removing these barriers benefits those who are: "d/Deaf and disabled, older, vulnerable, low income, overworked, geographically remote, chronically ill, time poor, or carers" (Misek and others, 2023: 5). Digitalisation has, it seems, much promise for domestic audiences.

Recent developments in available data and their analysis possibilities offer opportunities to further understanding of domestic audiences (Oman, 2021). To date, the picture remains unclear on what different UK audiences' digital needs are and the types of content they want to consume. This is partly because this is hard to generalise in a meaningful way, considering the diversity of audiences, platforms and geographies, but also owing to overarching issues with research in the sector. Empirical understanding of digital engagement was described as "scarce and sketchy" as recently as 2016 (Walmsley, 2016), the same year that ACE and the UK Theatre and Society of London Theatre commissioned research to understand the impact of digital developments in theatre, with a focus on audiences, production and distribution (AEA Consulting, 2016). This research found that consuming theatre online ran in parallel with, rather than instead of, attending live theatre in-

[11] For example, "every adult should have affordable access to digital networks" by 2030 (United Nations, 2019: 4).

person, a finding echoed by research on participation post-COVID-19 pandemic (Feder and others, 2022). In short, more analysis is needed to understand not only how to reach, or engage different audiences, but also what attracts who to particular cultural experiences that are digitally available. This is true of domestic as well as international audiences.

4.3. Digital culture: international

4.3.1. UK culture as export

The ‘Boundless Creativity’ report (DCMS, 2021) identified that digital culture presents opportunities for broadening the offer for international audiences as well as domestic audiences. It recommended further research into the potential for reaching new global audiences digitally based on cultural innovations observed during the pandemic.

UK culture is championed as a “great” export.[12] However, interviewees pointed out that the success of this perception is also a limitation. Confidence in UK culture as an export has always been high. Notably, aspirations for the (especially economic) impact of this grew in creative industries discourse in the New Labour years (Hesmondhalgh and others, 2015). The interviews reflected on their experience of overconfidence in UK culture’s potential as an export that can “increase attractiveness” and “promote growth” resulting in underinvestment and hindered progress.

International cultural relations and diplomacy was undervalued, according to interviewees, despite its key role in markets, new audiences and opportunities for the UK cultural sectors. This is notwithstanding research showing that the UK’s global position, for example, for attractiveness or trust, is not uncontested, fixed or recognised in the same way across nations (British Council, 2023a). The ‘Integrated Review Refresh’ states the government will seek to “maximise UK soft power” (HM Government, 2023: 14) but this is not currently matched by (plans for increased) investment on reaching international cultural audiences.

4.3.2. Understanding digital in the international context

The international differences in cultural, media and digital policy and regulation, together with divergent internet usage within and across nations, makes it difficult to comprehensively understand online arts consumption cross-nationally. Additionally, data processes which may help understand these issues (what data are collected and how they are used) differ by region, nation and individual organisation. Therefore, it is difficult to gain comprehensive insights into how UK culture reaches international audiences and their engagement with UK digital cultural outputs.

Furthermore, there is limited understanding of the demand for UK digital culture from abroad, and what attracts diverse audiences. The European Union remains the most significant region for the international activity of English arts and cultural organisations (AEA Consulting, 2016), yet the fifth ‘Digital Culture’ report noted a decrease in digital audiences for English culture in 2019 (MTM, 2019: 6). It makes sense that the geography of arts organisations’ digital international activity tends to be more widely dispersed than for physical activities. Data on digital interactions may be less sophisticated than for in-person activities, but evidence suggests that technologies are opening up new possibilities for UK culture to widen engagement and reach and be more accessible to both domestic and international audiences (AEA Consulting, 2016).

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[12] See, for example, the prominence of culture in the GREAT campaign https://greatcampaign.com/campaigns/

4.3.3. International priorities for UK digital culture

Despite the opportunities, we see that reaching international audiences is not a top priority for many cultural organisations. In 2023, as in 2014/15, "artistic and professional development" and "knowledge exchange and collaboration" were the two most reported benefits from international activity, and this work is largely supported by public subsidy (Arts Council England, n/d.b: 15). Interviewees also discussed how reaching international audiences is a lower priority for most organisations owing to issues of resource and return on investment. 'Boundless Creativity' participants offered mixed reports about the impact that streaming content had on their finances, together with concerns that it was not a sustainable alternative to live performance as the investment was significant and returns were not as high (DCMS, 2021). This research has found an overall post-pandemic decline in audiences prepared to pay for online content, thought to reflect audience expectations of content at free or little cost (Kulesz, 2020; see also Arts Council of Northern Ireland, 2021). There needs to be a better appreciation of the costs and benefits of developing online presence for organisations who want to expand international reach if future investment is to be effective.

Greater clarity is also needed in UK Government ambitions and priorities for international engagement and soft power and/or cultural diplomacy and cultural relations. The academic and policy literature recognises that UK cultural productions and their international dissemination contribute to soft power and cultural diplomacy efforts. More broadly, terms like cultural diplomacy and cultural relations are used interchangeably (such as European Union External Action Service, 2016) to refer to the exchange of ideas, values, traditions and other aspects of culture or identity, to strengthen relationships, co-operation and promote national interests. So too is soft power, understood as the leveraging of a nation's attractiveness and international influence (Nisbett, 2016).

While the terminology may be used interchangeably, it is nonetheless clear that the cultural levers for soft power lie in (digital) cultural diplomacy or relations as an important function of cultural policy. Cultural diplomacy and soft power rely on the cooperation of several ALBs, most notably the BBC and the British Council (HM Government, 2023). The 2018 'Culture is Digital' report asserts that it is government priority to "project [the UK's cultural offer] to the world as we prepare to leave the EU" (DCMS, 2018), later emphasised by The British Council All Party Parliamentary Group (2020). The maximising of soft power sits at the heart of the recent 'Integrated Review Refresh 2023'. This states that "The Government will seek to maximise UK soft power" and "will also continue to protect and promote the soft and cultural power that the UK has internationally" (HM Government, 2023: 14 and 53). The 'Integrated Review Refresh' recommends paying increased attention to international influence, and the economic, diplomatic, military, social or cultural levers that achieve this (HM Government, 2023). Yet the potential contribution of digital cultural activities to cultural diplomacy or soft power mechanisms has been assumed, oversimplified and under-researched, despite the confident rhetoric and complexity of this field.

In 2022, the British Council set out a definition of digital cultural relations and re-emphasised its importance in terms of both offline and online perceptions of other countries (ICR Research, Grincheva and Vlaeminck, 2022:3), building on an earlier assertion of the "mutual influence", directly linked to trust building, inherent in digital cultural relations (Duenbier, 2021). Similarly, the British Council set targets wherein the reach of international audiences relies predominantly on a mix of digital and face-to-face to engagement, where most engagement rests on digital connection (ICR Research, Grincheva and Vlaeminck, 2022; British Council, n/d.).

Scholarly understanding of this field is described as “rare and far apart” (Roberge and Chantepie, 2017: 295, in Hylland and Primorac, 2023) but efforts and resources are required across DCMS areas to maximise on digital possibilities for the UK cultural sectors abroad. More research on the interdependencies of digital culture, cultural diplomacy and soft power and the implications of this lack of clarity in UK (cultural and digital) policy is therefore needed for the cultural sectors to be able to thrive internationally.

4.3.4. Challenges for UK culture on the global marketplace

The resilience of the international creative economy and its relationship with digital technologies was noted by the United Nations in 2018 (UN, 2018). However, the international creative economy is more complicated than exports alone. For example, international cultural policy also foregrounds protectionism of national cultural products (Hylland, 2022) and the prevention of dominant imports from the US and the UK. This perspective is rarely discussed in line with ambitions to promote and connect with international audiences. In 2022, the UN indicated that digitalisation could be a leveller for less-developed countries and less well-known cultural products (UN, 2022). In such cases, improving an international digital economy may not directly benefit UK cultural production and dissemination. The cultural politics of exports is one challenge for the UK. However, other structural barriers can hinder international audiences' access to UK cultural content.

These barriers include information, regulation (Foreign Secretary and the Secretary of State for Science, Innovation and Technology, 2023; Misek and others, 2022; UN 2022), financial and linguistic barriers. While some of these are domestic challenges, too, the support needed to thrive in international contexts is even more complex, and interviewees noted that this lack of support demands attention that it is not currently receiving.

UK organisations could focus efforts on optimising their international reach, but barriers would remain. Not all international audiences have the technology or the permissions to access certain digital content. These barriers may be financial or owing to national or regional platform regulations. These dynamics are in constant flux: in the scoping phase of this research (2022-23), calls for TikTok training were observed as an informal recommendation to share cultural content. These dwindled following cybersecurity concerns and the UK Government banned TikTok on government devices, with other public sector organisations following suit (BBC, 2024). This is one of many examples of what are called "bottle-necks" in the value chain around digital dissemination and promotion (European Commission, 2017), and how broad the attention of a digital strategy must be to account for sudden change. The UN notes the tightening of the international regulatory environment around digital trade and commerce (UN, 2022) as further evidence that digital platforms are not a simple, efficient replacement for in-person participation.

In our increasingly digital society, algorithms (recommender or recommendation systems) from content providers now influence what and how UK culture reaches international audiences. This role traditionally fell to cultural diplomacy and relations efforts. This platformed audience experience is said to offer audiences greater choice that is curated to suit what they have watched before.[13] Somewhat contradictorily, however, they can in fact limit access to UK cultural content.

Unless a recommender system is designed by a UK cultural entity (such as the BBC), it is unlikely to make a recommendation in a way that strategically benefits UK cultural sectors and audiences. Similarly, the greater availability of content may contravene protectionist principles, jeopardising diverse, less mainstream international cultural content (European Commission, 2017). This issue is increasingly discussed in some policy and research, particularly that focussed on IP and the diversity of cultural expressions (see, for example, KEA, 2024). However, it is still often overlooked in research about technological developments themselves in the cultural sectors (DCMS, 2023c). When soft power is listed as a key priority, the (digital) limitations to this are often not acknowledged, as in the Creative Industries Sector Vision (DCMS, 2023a). More generally, international media infrastructure and policy, and the degree to which they are commercialised and digitalised, affect the way people interact with and interpret culture and its value. This needs to be better

[13] The BBC has some interesting blogs on recommender systems (see Marcus, 2021). See also the Living With Data project (2022) for explanations on how some BBC recommender systems work.

accommodated in research to further an understanding on digital policy priorities for the UK cultural sectors.

Finally, attracting international audiences who are prepared to pay for UK digital culture relies on the high-quality production that they demand (Myrczik, 2022). Interviewees discussed these cost implications, which are often not digital at all, but about scenography, costumes and staging, relying on highly skilled analogue staff (as noted above with camera operators). The lack of specificity for digital and analogue costs in digital funding opportunities may be prohibitive for organisations considering or prioritising an international audience.

4.4. Conclusions and implications for infrastructure

The ambiguity of funding streams for UK cultural sectors makes it difficult to identify what support is going into digital infrastructure. Even within funding sources, like Arts Council England (2022), investment in digital spans many programmes. Therefore, it is difficult to account for or evaluate the impact of funding for digital activities or innovations. Similarly, we lack understanding of what would work at a scale that can benefit the whole ecosystem, or, indeed where investment may have affected (positively or negatively) the activities of individual cultural organisations.

The lack of trust in investments and their evaluations was striking in discussions throughout this research. Infrastructural developments, and the frameworks that underpin them, are not as supportive as they should be. Arguably, they come with the risk of perpetuating already acknowledged inequalities and the digital divide, making more challenging access to and the promotion of a diversity of cultural expressions (see UNESCO Digital Library, 2020; United Nations, n/d.; Allmann, 2022). Funding for digital activities should be facilitating research, development and innovation. Such funding must incorporate the possibility of failure and the opportunity to fail, safely.

Not all existing research and evaluations inform digital cultural policy and practice. This is because some remains unpublished and so cannot feed into shared learning. Suggested reasons for this shared by interviewees included small sample sizes in surveys and qualitative research and a fear that sharing data and findings would make organisations more vulnerable to negative scrutiny. Despite recent efforts from the Centre for Cultural Value (n/d) highlighting the importance of good evaluation and acknowledging failure and improving data, the principles they recommend have not been translated into practice across the sectors. The working cultures of the sectors are still resistant to admitting failure. Difficulties in recognising, acknowledging, and learning from failure have been noted about the sectors more generally.[14] These conditions are a barrier to realistic goals setting for what successful digital activities look like.

Given the limited insights into how investment translates into infrastructure, understanding success and assessing the remaining gaps is difficult. Further, investments in digital infrastructure, strategy and policy often overlook the value and position of people in digital innovation. As we have discovered, research exploring digital culture and related activities tend to prioritise case studies of good practice, often profiling the successes of high-profile institutions.[15] This approach to research and evaluation obscures doubts from the sectors regarding the contributions of existing programmes and ways of doing things. This research revealed reservations regarding the resilience of digital initiatives and their contribution to a

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[14] The failspace project's findings and recommendations are helpful, but currently underutilised. See How to … fail well https://www.culturehive.co.uk/CVIresources/how-to-fail-well/

[15] For example, 'Boundless Creativity' (DCMS, 2021).

sustainable investment in people and infrastructure for the cultural sectors more broadly. Consequently, the evidence on what is and is not working for the rest of the sectors is not as developed as it could be.

Finally, the expectations of UK culture to deliver soft power aims, and for digital culture to enable it, require strategic improvements in funding and evaluation. This is also about people. Cultural diplomacy and partnership working are necessary to ensure the international digital and media infrastructure that enable sharing platforms facilitate cultural policy aims in the sharing of culture. All of these issues must be considered together.

5. Conclusions

The UK cultural sectors have seen a number of external shocks, with the impact of the COVID-19 pandemic being the most reflected on. Learnings from the digital pivot are vital, but these learnings must include evidence on its limits as something transformative or sustainable. Focus on digital developments as good for UK cultural production, soft power and the development of international markets is valued and timely. However, there is much work to be done to clarify purpose and priorities if the UK cultural sectors are to share this ambition within a healthy and supportive infrastructure.

Given that the remit of this research is to understand digital culture, it is particularly important that, as digital activities are either reprioritised or scaled, it is clear to the cultural sectors what the intentions behind international activity are. The frequent interchange of loaded terms such as international (digital) cultural relations, international cultural diplomacy and soft power present challenges in setting a direction of travel for the sectors and how it can support and deliver international ambitions.

The relationship between digitalisation and other aims, such as economic growth, internationalisation, resilience, levelling up and accessibility are assumed, but are they empirically sound for cultural sectors? How does one form of development intersect with wider sustainability concerns and international digital, media and technical infrastructures? How can distinctions be made between digital innovation and the novel speed and scale of digital adaption in the digital pivot, particularly when specific activities may not have been innovative in-and-of themselves? What does this mean if evidence suggests that these adaptations cannot be sustained?

This report has found that support for the digitalisation of UK cultural sectors is well-received, but with some reservations. Organisations value the support available but recognise that more is required. This includes guidance on how they might meet aspirations for digitalisation, whether these are externally or self-imposed. The breadth of the research and policy areas relevant to digital, as highlighted by this report, demonstrate the importance of partnership working, equitable consultation, research and experimentation to inform future work and collaborate in its delivery through an explicit digital strategy for culture.

6. Recommendations

Building on past recommendations shared by the 'Boundless Creativity' report and as set out in the DCMS ARIs, this research presents two complementary, overarching recommendations. Namely, to develop the first explicit digital strategy for the cultural sectors and to do the comprehensive research needed to inform both its development, delivery and evaluation. This section expands on the headline findings and headline recommendations in the executive summary.

6.1. Create an explicit digital strategy for the cultural sectors

Any new digital strategy for the UK's arts and cultural sectors will need to start with a clear commitment to the role of digital in culture. Therefore, a digital cultural strategy should:

1. Offer clarity
    a. Offer user-friendly definitions of digital culture and related activities, and how these will likely evolve over time.
    b. Be clear on the differences in digitalisation and digitisation as imperatives for different cultural processes and sectors.
    c. Make the role of digital activities clearer across national and international contexts. This might include innovation and/or risk; expanding markets and reaching new audiences; market failure in efforts to improve the diversity of audiences and cultural engagement; building long-term infrastructure; and skills for future sustainability.
    d. Set out clear ambitions. Actions should be explicitly linked to the objectives of digital policy interventions. In turn, informed by available evidence, policy should consider what investment in digital activities in and of itself could facilitate for other sectors.
2. Address current and future needs
    a. Recognise the varied needs around digital production and dissemination across the cultural sectors and for organisations of different scales and business models.
    b. Focus on facilitating opportunities whilst also acknowledging and addressing barriers to international access to UK culture.
    c. Acknowledge the demand for high quality digital content and the financial and skilled resources, both analogue and digital, required to produce it.
    d. Acknowledge the information, social and cultural barriers to widening digital access to culture, and align with and/or support other policy development to overcome these barriers.
3. Set realistic ambitions that connect to sector and governmental priorities
    a. Establish expectations, aspirations and priorities for the UK cultural sectors to become digitalised in ways that acknowledge and embrace difference and sustainability.
    b. Continue to sing the praises of UK culture at home and abroad but acknowledge that digitalisation is changing the way people choose to participate in culture and that the balance of passive and active consumption is shifting.
    c. Facilitate innovation and R&D in digital activities, while acknowledging they involve a higher level of risk. Extensions to existing tax relief funding could be piloted.
    d. Move towards greater transparency and accountability in digital investment. This includes but is not only the role of evaluation good practice.
    e. Demand the evaluation of what works in a way that can incorporate reflection and the open sharing of what did not work.

   f. Embrace opportunity and embed international ambitions or possibilities in funding agreements for organisations of all sizes.
4. Centre the uniqueness of the cultural sectors
   a. Start with a commitment to serving current and future workers, audiences, communities and organisations.
   b. Acknowledge that plans for digital infrastructural development for the cultural sectors affect staff and organisations, rather than focussing on flagship institutions and initiatives, or things that are technology centred. This will better ensure long-term relevance.
   c. Address the multiple barriers that can face a single organisation or project at the same time.
   d. Reconsider uses of deficit language in digital policymaking. Learning from research on cultural participation[16], concepts such as skills gaps and digital divide should be reconfigured to think of digital inclusion and scales of wanting to participate in ways that suit audiences. Reframe skills gaps as siloes of infrastructure and training. Similarly, ideas of transformation and maturity can be reframed in ways that are less alienating.
   e. Encourage knowledge sharing across the sectors. Acknowledge the opportunities and limitations of each existing provision (see, for example, DCN tech champions).
5. Encourage a focus on international as well as domestic audiences
   a. DCMS, in partnership with relevant ALBs, should develop its thinking on and resources for cultural diplomacy, cultural relations and soft power. There should be an aim to harness soft power possibilities and strengthen what is known about growing international markets by using or commissioning evidence on what international audiences want from UK culture. Reaching new international audiences requires sustained, long-term resource investment.
   b. Ensure that strategies to promote UK culture internationally are flexible enough to evolve and respond to rapid technical developments and opportunities.
   c. DSIT and DCMS should work together to develop an industrial strategy for cultural exports that aligns with the recommended digital cultural strategy, recognising the relationship between new markets and new revenue streams.

6.2. Commission research on the value, meaning and opportunities of digital activities across the cultural sectors' stakeholders and geographies

This should be commissioned by the UK Government, research councils and/or ALBs to improve the evidence base. A programme of commissioned research should:

1. Map investment into the existing digital infrastructure to identify key actors, gaps and opportunities, including where bottle-necks in the value chain might limit digital dissemination and promotion.
2. Identify current and future needs and opportunities:
   a. Differentiate between the needs of different parts of the cultural sectors.
   b. Focus on putting research into action and seek a broad range of opinions, not just big names, trying to get new voices and perspectives where possible.

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[16] Such as the Understanding Everyday Participation (UEP project).

   c. Move beyond skills (gaps) mapping and instead focus on deepening an understanding of what has worked in practice at different scales, geographies and mechanisms.
   d. Address the long-standing data skills gaps across the sectors, policy advisors and academia through a joined-up programme, establishing the training required and its delivery. In doing so, they should recognise, fund and facilitate peer networks with a focus on the quality of data and evidence (such as CDRN).
   e. Conduct a review of the role of digital culture in achieving international aims as addressed in the 'Integrated Review Refresh' (DCMS, 2023), as well as bringing together ongoing work on soft power.
3. Address recommendations relating to further research, monitoring and evaluation:
   a. Link more strongly research and evidence to investment, infrastructure and evaluation to understand what works and what does not in digital activity in the UK cultural sectors.
   b. Include a critical review of previous evaluations and existing or ongoing investments in digital cultural policy activities to reflect on what works. This should include addressing questions of how investments were evaluated and the relationship between risk and innovation.
   c. Reflect on the limitations of evaluations: if only a small-scale evaluation is possible, this should be acknowledged together with caveats which accompany some measurement tools. These changes will improve shared understanding of what works, for whom, when and why.
   d. Recommend ways that we can learn from projects that were less successful than intended.
   e. Research stakeholders, government and sector leaders (including ALBs) should collaborate on how to improve the evidence and research methodologies on digital participation and engagement, acknowledging the strengths and weaknesses of all existing approaches in order to improve the evidence.
   f. Explore and assign responsibility for a repository of evaluations and good practice case studies, and encourage a culture of data and insights sharing, whilst protecting IP.
   g. Across research institutions, align to address known data gaps, including those identified in this report.
4. Capture good practice from across the diversity[17] of the cultural sectors:
   a. Reconsider the utility of concepts like digital maturity and digital transformation for all, move towards the more modest but comprehensive aim of understanding what is happening and describe and share related insights in more accessible ways.
   b. Prioritise the identification of unusual, atypical and/or unobvious successes, particularly amongst smaller organisations and projects, and isolate the factors that lead to this success. Move away from a tendency to focus on case studies of large institutions that have good existing infrastructure.
   c. Consult on what digital cultural policy and investments are needed, where and why.
5. Take a people-first approach. Assess the strengths and weaknesses of digital infrastructure for culture in a way that is people centred. Focus on how digital works for people across UK cultural sectors' activities, rather than beginning with digital innovation for the sake of it. A people-centred approach should be inclusive, whether

[17] Including, for example, smaller, non-urban organisations and those with past experience in digital activities as well as those new to digitalisation.

these people are existing audiences, potential audiences, workforces or organisations.

6. Address research gaps such as:
    a. The varied barriers to access for (digital) audiences.
    b. The lack of understanding of demand and preferences of international and domestic audiences.
    c. The role of cultural diplomacy in extending the reach of UK digital cultural content.
7. Consider the impact of technical developments beyond the control of cultural organisations:
    a. Research and set out recommendations for how algorithms and recommendation engines bring, or could bring, UK formal culture to international audiences using existing content platforms. Assess how these interact with, limit or could progress soft power and cultural diplomacy goals, as well as cultural diversity.
    b. Assess if the design or architecture of existing sharing or content platforms exacerbate a digital divide.

7. Appendix: detailed methodology - embedded research

Embedded research is recognised as a joined-up approach to knowledge production and use, which accounts for context and stakeholder interests, drawing on both researcher and practitioner networks and experience (Cheetham and others, 2018). In this case, the researcher undertook an evidence review while embedded in 1, the policy organisation (DCMS), 2, academia and 3, the cultural sectors. This enabled access to the following forms of evidence, which in addition to information from the wider international policy context and other stakeholders (including ALBs), included:

- Published evidence
- Evidence in production (insights into surveys under production and data aspirations, also unpublished)
- Stakeholder evidence – unpublished and often sensitive
- Reflections from stakeholders on evidence quality and what works

There is clear added value to the embedded research approach. 1, by enabling knowledge exchange across research, policy and sector domains. 2, by improving a shared understanding of the research problem from different perspectives. 3, by exploring different perceptions of evidence and evaluations, as well what worked in what contexts and for whom.

This evidence was collected in several different ways. These are described below, and each section outlines how the approach taken adapted to the research context.

Timeline	Phase	Activities
Jun 2022 - Jun 2023	Scoping	• Ethics and data agreements • Scoping conversations / shape final research aims • Literature and evidence data collection and analysis
Jul 2023 - Nov 2023	Interviews	20 interviews with stakeholders across digital, cultural, media sectors and policy
Dec 2023 - Jun 2024	Analysis / write up	Analysis of evidence and report write up and steering committee consultations

7.1. Evidence review

The researcher was familiar with key texts and authors. Furthermore, “asking around” can be more efficient in its return of evidence than formal protocol-driven search strategies “which can fail to identify important evidence” (Greenhalgh and Peacock, 2005: 1064). For this reason, a snowball-sampling approach to the literature was chosen as the predominant method of data collection. In practice, this embedded evidence review and snowball approach to published literature involved following all relevant-looking bibliographic references, as well as drawing from discussions in scoping meetings and other sources, such as on social media platforms, to enrich the sample of literature reviewed.

Around two hundred items of published evidence were reviewed, alongside which, unpublished information and reports were made available to the researcher following meetings with DCMS, key stakeholders and some sector organisations.

Documents were selected for analysis on the following grounds: they describe general policies, strategies or aspirations for, or are concerned with digitalisation, international or cultural policy; or they are concerned with sub-sectors of cultural policy and reference digital culture, or external factors related to it (such as post-pandemic recovery). No method is perfect or exhaustive for understanding any phenomenon, and who does the searching will always bias the results (Oman and Bull, 2022). However, this snowball approach to literature and evidence includes high-profile research and systematic reviews, while also identifying experiential evidence, unpublished evidence and people's opinions of evidence.

7.2. Research design

A sectors-wide survey was considered to address the research aims and objectives and improve evidence on the uses of digital technologies across the cultural sectors, which often fails to acknowledge complexity and difference across organisation size, artform and location. However, early findings from the evidence review identified the extent of post-pandemic and cost-of-living crisis surveys being conducted at the time and the likelihood of survey fatigue (resulting low response rates) across organisations and individuals. This was reiterated during scoping meetings in the summer of 2022 with DCMS, stakeholders and the sectors, which also reinforced the overall pressure on the sectors at this time.

The placement scoping phase began one year after publication of 'Boundless Creativity' and the conception of the placement research questions. In this time, and throughout the scoping phase, published findings from other research were beginning to reveal that the significance of the digital pivot was less substantial and sustainable than originally anticipated in 2020 to 2021. As the placement aims and objectives were updated to reflect this newer knowledge, it was decided that instead of a comprehensive piece of research on the sectors, such as through a sector-wide survey, it was important to pause and reflect on the ample findings from existing evidence (published and unpublished), literature and interviews. It was therefore decided the placement should maximise on opportunities of access and time afforded by the fellowship to reflect across the evidence available on what is already known.

7.3. Interviews with sectors representatives, DCMS and key stakeholders

The scoping phase discussions and review of published literature indicated the extent of research that already existed in the areas under review. Furthermore, it became clear that existing research tended to foreground case studies of successful, especially high-profile, interventions and flagship organisations. Instead, this research purposely sampled less obvious but equally knowledgeable and experienced people across cultural and digital sectors, stakeholders and DCMS. An open and more holistic approach to the interviews, and exploratory research questions, enabled findings that incorporated a broader range of perspectives. Between July 2023 and November 2024, ten interviews with DCMS staff and a further ten interviews with non-DCMS staff took place. These were unstructured in their nature, responding to themes of digital technology and innovation, digital and cultural policy, skills, research, evaluation and practice. All interviews began reflectively, asking for comments on what works well and drawing out recommendations for what could be improved.

7.4.Ethics

The researcher held a unique position, in that they were embedded in DCMS, with government security clearance, but also, was working under the ethics agreement of the University of Sheffield, meaning that not all evidence shared by the sectors would be shared with DCMS or included in the report references or annotated bibliography. Findings are synthesised across these data sets and are described in aggregate, maintaining the anonymity of all participants, the organisations represented, and the sensitive evidence used in line with best ethical practice.

8. Acknowledgements

8.1. About the author – Dr Susan Oman

Dr Susan Oman was Digital and International research-policy fellow, based in the UK Government's Department for Digital Culture, Media and Sport. Her AHRC-DCMS ran June 2022 - May 2024. Susan is also Senior Lecturer in Data, AI and Society and AI/Inequality Lead for the Centre of Machine Intelligence, The University of Sheffield. She completed her AHRC-funded PhD, based in Sociology at the University of Manchester in 2017. Her thesis was on the cultural politics of participation and well-being in the context of metrics and knowledge production. Her two subsequent Creative Economy and Engagement Fellowships with Arts Council England resulted in changes in inequality data collection and use.

Susan's work seeks to understand data, evidence and AI from different stakeholder perspectives, often studying a particular policy problem (such as well-being, inequality or digitalisation) 'in the round'. Susan has worked with: ACE, DCMS and countless cultural sectors organisations, as well as the Office for National Statistics, Department for Work and Pensions and Sheffield City Council.

8.2. About the funder – Arts and Humanities Research Council

The Arts and Humanities Research Council (AHRC) funds world-class, independent research in subjects from philosophy and the creative industries to art conservation and product design. Funded research addresses some of society's biggest challenges, such as exploring the ethical implications of artificial intelligence, and understanding what it is to be human.

8.3. About the host – the Department of Culture, Media and Sport

The Department for Culture, Media and Sport supports culture, arts, media, sport, tourism and civil society across every part of England — recognising the UK's world-leading position in these areas and the importance of these sectors in contributing so much to our economy, way of life and our reputation around the world. The department champions sport for all at every level, supports our world-leading cultural and creative industries, and enhances the cohesiveness of our communities.

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