

## **“The place of cultural portals in the context of converging digital culture”**

*Analysis of the Third Culturemondo International Survey of Cultural Portals*

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The rapid growth of the Internet, in number of its users and the information and services that can be accessed through it, indicate the importance of activities taking place in the virtual domain. According to the [www.internetworldstats.com](http://www.internetworldstats.com) data (June 30 2009) there are presently about 1.67 billion internet users in the world, which translates to about 25% of total world population. According to the same source, users growth in the period 2000-2009 has been 362.3%. Such a rapid growth brings very rapid changes where it is not easy to assess past and present trends, nor to predict the future ones.

The cultural sector is searching for a new *modus operandi* in these new conditions as digital culture, marked by the convergence processes, has brought many changes to the fore. When previously separated industries could, by using the same digital technology, do things that previously needed different analogue tools, the limitations they faced in running their real world businesses changed. This means that convergence is more than simply a technological shift and it affects changes that shape relations in a society. As Henry Jenkins tells us: “Convergence alters the relationship between existing technologies, industries, market, genres and audiences. Convergence alters the logic by which media industries operate and by which media consumers process news and entertainment” (Jenkins, 2006). The old logic has changed – what is the new logic by which we operate today?

Digital networks today provide various alternative platforms for communication. As average PC and network connections are not very expensive, this has led to the lowering of production and distribution costs and the availability of new communication and delivery channels. The context of the participative internet (Web 2.0) changes the context of cultural sector as well: As the role of the users becomes more prominent as they become co-creators of the digital content. This changes the position of the cultural sector, as among the immense amount of information available on the Internet users can find a diversity of information coming from a diversity of sources – traditional media, the profit sector, NGOs, the research community, individuals, the cultural sector, etc. In the explosion of available information and communication going on in the digitally networked environment, information about culture can be found in many different sources – amateur as well as expert - and cultural organisations have found themselves in a situation where they must compete for users attention and they must take into account users' changed expectations, tastes and habits.

This diversity of information and perspectives is a product of what Benkler calls the ‘networked information economy’ in which peer production and sharing have a significant role. Benkler proposes that one of the major implications of the networked information economy is the shift from a mass-mediated public sphere to a networked public sphere, in which many more individuals can communicate their viewpoints and observations to many others. This results from the fact that the practical capacities of individuals have been improved in the digitally networked environment. People can contribute their criticisms and concerns to ongoing debates, produce and publish information they produced themselves on their blogs and websites; or they can contribute to large-scale peer production projects. Such social production presents new sources of competition for cultural (and media) industries producing information goods. It is important for the cultural sector to understand the new context in which the users are at the same time their competitors and co-creators of cultural information. Understanding the opportunities that social production presents would contribute to developing mutually reinforcing relationships with institutions in the cultural sector, as social production is creating new sources of inputs, new expectations, habits and tastes as well as opportunities for outputs. “Consumers are changing into users – more active and productive than the consumers of the industrial information economy” (Benkler, 2006). Within such a context, in which cultural professionals are put in a situation in which they are sharing control with users, the roles of the consumer and producer are constantly shifting. In this context what are cultural portals today? Could we define them as a sort of alternative and participatory media, or just visible segments of cultural sector in the virtual environment? Are they alternatives to the main entertainment sites, or a reflection of convergence

processes in the cultural sector – structures in which culture meets media or structures in which culture meets (inspires or empowers) its users?

The cultural sector is experiencing the convergence processes in many aspects of its work. Cultural portals are reflecting this as they can also be viewed as elements contributing to the networked public sphere - being nodes in the WWW network (and at the same time a specialized sub-networks) - thus fitting into the category of information network that people are trying to navigate, in search of a particular type of content. It is clear from the data presented in the Third Culturemondo survey that portals cannot be looked at as separate structures in cultural sector, as the survey results indicate that in 75% of cases portals are only a part of the wider business remit of the organisation running the portal. The new possibilities opened up by digital technologies challenge our traditional ways of understanding culture, extending this understanding to digital culture. In this new model, some firm boundaries have shifted and we have to learn how to approach and merge this model with our 'real' world activities. Global connectivity and the rise of networks represent our new working context, in which the concepts and experiences related to culture have not stayed the same. The virtual context enables the cultural sector to operate on a new basis – in which the networked environment foregrounds possibilities of collaboration. But the current state of virtual culture does not seem to indicate significant changes in the activities of the cultural wider sector in this respect. This could be attributed to the fact that cultural institutions still find it important to control the content they publish. Interactivity and user involvement present challenges for cultural portals because such openness challenges their editorial policies. According to Jane Finniss *'One of the key differences between the cultural sector and a lot of the biggest Web 2.0 sites or services is that the web services were born digital – their structure, functionality, premise, purpose, delivery – everything was conceived to be online, and the nature of the technology defines what they are and how they work. Those businesses and services not born digital – i.e. everything else (including practically all the websites from cultural organizations) – are mostly going through some process of evolution, from the real to the virtual, and with varying degrees of success.'* ...*'For organizations like museums and galleries this evolutionary phase is challenging and difficult, many institutions carry with them hundreds of years of history, and established and institutional ways of thinking and working. The culture of that thinking is very well defined in many cases and does not sit easily with the open, non-hierarchical, interactive nature of the Web today.'* (Finnis, 2008) It is no surprise that cultural portals are found in the middle of this transition trying to find suitable ways of operation for the cultural organisations in the virtual domain.

Today low technical entry barriers enable easy start-ups of virtual services, which mean that anyone with initial enthusiasm and motivation can start some kind of virtual service, website, portal, database... but running them depends not only on technology but on well thought ideas and services offered to a targeted group as well as on secured resources. Success depends on securing long term viability as well as on the long term relevance. Flexibility, responsiveness and 'light-touch governance' are required both in establishing cultural portals and maintaining their connections and relevance to the audiences. Cultural portals are often non-profit, run by small teams and operating on modest budgets. Still their mission is often ambitious. As portals depend on public funding they must take into account the aims and priorities of cultural policies and how they might face particular challenges when these policies change (and funding is withdrawn). How essential are portals in public policies of different countries? Which criteria should be employed when deciding on supporting them? These questions need to be resolved within the cultural policies of different countries in order to be able to give support to culture that went down the digital path. Learning to work in the networked environment is an imperative for cultural sector, but also for a cultural policy that often puts emphasis on digitisation of heritage projects but is not particularly at ease with the participatory aspects and dynamism of digitally networked environment. Digitisation of cultural content is a basis for development of digital culture and cultural portals are thus an important link between cultural content and its users, as portal publishers try to encourage users to explore their culture and to participate in the process of intercultural communication. It is not only about getting or providing information, but about being actively engaged in social and cultural issues. Below follows the reality check of the cultural sector engagement in digital culture via their online services and portals.

## Survey Background

In the first half of 2009, Culturemondo Network, in cooperation with Culturelink Network, conducted the Third Culturemondo International Survey about cultural portals and related trends in digital culture and heritage. The aim of Culturemondo international surveys<sup>1</sup> of cultural portals is to look at cultural portals in an international context and by examining cultural portals' related trends help to support national, regional and local virtual initiatives on a global level. The third Culturemondo International Survey revised previously-asked questions and shifted its focus to new participatory trends, aiming to find out if the cultural sector engages users in virtual environment and whether new working practices have emerged. The survey has been implemented using [www.surveymonkey.com](http://www.surveymonkey.com). It was live from November 2008 to June 2009, in which time we have collect answers from cultural portals around the world that allowing us to spot some trends in the development of digital culture in which cultural portals play a significant role.

In this survey an attempt has been made to identify existing cultural portals in different countries and regions and invite them to participate. An invitation has been sent to all portals that have previously been identified by Culturemondo, or have previously participated in some of the Culturemondo activities. In addition invitation have been sent out through various existing cultural networks or portals' mailing lists and in direct communication with all identified portals through web searching. We have made an effort to ensure a balanced response from different continents. Still regional imbalance exists, reflecting partly the situation in the field and the number of existing portals in particular areas, but also bias due to stronger links of the survey organisers with portals in a particular regions or countries. Out of 147 started surveys, 101 are completed and valid for this analysis.

The word portal as we understand it in the context of digital culture started to be used in the 1990s. It was usually defined as a starting website (a gateway) through which its users could easily access other virtual information resources they are interested in and which are located at different websites – i.e. portals enable their users to access information from various sources at one place. Cultural portals are specialised portals which provide access to the existing web cultural resources, but these portals also contribute to the production of their content. Through the construction of new referral services (systematic collection and organisation of content) they contribute to organisation and information support of the particular cultural sector. Considering the communication dynamism over the internet and permanent appearance of new content, the role of portals has become increasingly significant in providing information on new resources on the internet and activities of the cultural sector in real sphere. Portals have become aggregators, producers and organisers of dynamic content such as news and information, rather than just a set of links as was their role at the early stage of development of the internet. Therefore, the majority of portals can be described as online publishers - virtual magazines (news portals) which provide news for their users. They are not only focusing on promotion of other web resources, but their focus extends on information on cultural events in the real sphere. Regardless of a definition of a portal, in practice clear distinctions between portals and other virtual resources are not easily observed because portals, on-line journals, multimedia databases and often web sites of professional associations or cultural networks all provide information relevant to the cultural sector and their audience. One of the definitions distinguishing a portal from any other type of web page points out the role of the user. While web pages are structured to represent an institution and foreground the representational logic of an institution, portals structure their content in the way expected by users. The nature of the online business has changed over the past years. We wanted to see how cultural sector has managed this change and what kind of virtual structures exist today, supporting communication between cultural organisations and cultural audience. Below we present an overview of the third Culturemondo survey findings in order to try to find answers to these questions.

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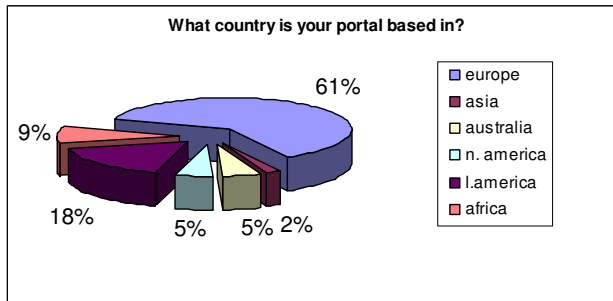
<sup>1</sup> As an initial step in creating the network services, the Culturemondo International Steering Committee created an on-line survey to identify common characteristics of cultural portals. There have been two online surveys completed previously, the first in 2005 and the second in 2006. Both surveys were conducted by DECIMA research in Canada using a simple online questionnaire. The data obtained from the first survey, shaped the first convening of the Culturemondo Network in Japan in 2005 which focused around four themes: partnerships, governance, content management and marketing and audience needs. The results from the 2005 survey were used as a base for an analysis and report that encompassed not only the survey results but also the resulting discussion from the first roundtable where the results were presented. The report written by Katherine Watson *Cultural Portals - Gateways to a Global Commons* ([http://culturemondo.org/files/culturemondo-32pp-wi\\_14790d.pdf](http://culturemondo.org/files/culturemondo-32pp-wi_14790d.pdf)) articulates the key issues facing the sector and benchmarking activity at that point in time. The objective of the second survey was to build on the previous comparative analysis on cultural portals worldwide and to inform the 2nd Culturemondo Roundtable (Dubrovnik, 2006) and its four sub themes: Web 2.0, International Cooperation, Virtual Communities, and the Measures of Success. The summary of the survey results prepared by Aimee Fullman is available at <http://culturemondo.org/files/final-survey-analysis.pdf>. Both surveys collected a mixture of general information about each portal; details of its funding, constitution and content, as well as some performance metrics and web statistics.

## Survey Data Overview

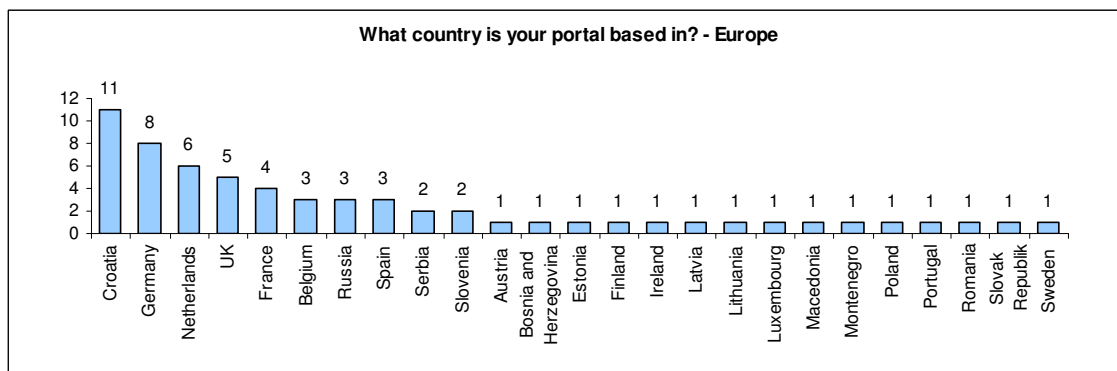
### General Information

#### *Geographic Distribution of the Portals*

Of all the portals that answered the survey, 62 are based in Europe and 39 on other continents: 9 from Africa; 7 from Asia, Australia and New Zealand; 18 from Latin America; and 5 from USA and Canada (Graph 1 and 2). The regional imbalance is visible, reflecting partly the number of existing portals in particular areas, but also stronger links of the survey organisers with portals in particular regions or countries.



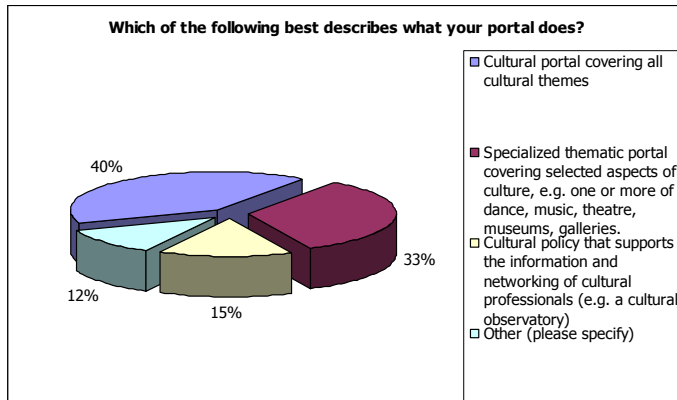
Graph 1



Graph 2

#### *Type of portals*

Portals participating in this survey fall within 3 main categories – those covering many cultural themes (general cultural portals), specialised thematic portals for a particular theme or cultural area or cultural observatory monitoring cultural trends (Graph 3). A number of portals that chose 'other' as an answer to this question (9 portals altogether) only further specialised their target audience and in fact they can all be placed among the 3 offered categories – 7 to specialised portals and 2 to general portals categories, bringing these two categories closer in a number of total answers. The general cultural portals and specialised portals are predominating categories, and cultural observatories form a smaller part of virtual resources (15 %). The data collected from previous Culturemondo surveys showed the same situation, where national portals covering many themes and specialised cultural portals predominated over cultural observatories aiming to monitor cultural trends. This situation is to be expected since the target audience for cultural observatories are narrower circle of cultural professionals (94%), and general or specialised thematic cultural portals cater for the needs for general cultural public, as well as for the professionals in the field, thus diversity of services for those audiences is far greater. General cultural portals are oriented towards general public in 64% of cases and to cultural professionals in 23% or to both audiences, while thematic portals indicated that they are primarily targeted at cultural professionals in 52% of cases, to general public in 42% cases or to both.



Graph 3

### Mission / Purpose

The mission of the portals analysed show us their reason for running. Answers differed, but also many repeated the same aims and mission. Common to many portals which participated in this research is that their purpose is general promotion of culture or specific cultural areas. To be a one-stop portal, to offer a central access to all the cultural services and resources for promotion of culture, arts, artists and heritage, in a particular region or in a particular cultural sector, to raise visibility of the cultural sector and to support cross-cultural cooperation has been repeated in many answers. Below are some illustrative answers from this survey question:

To encourage more people to participate in culture and to support and promote a sustainable cultural sector.

To provide information about cultural events ...

To present information on museums for general public and professionals ...

To be the first port-of-call for users seeking cultural information and discussion in a cultural expert backed community...

... to promote and support the (cultural) sector online and to serve the needs of online audiences...

... a web-based information resource for artists, theoreticians, and cultural managers ...

... to ensure that all those working on cultural collaboration have access to up-to-the-minute information and to encourage the cultural sector to become more experimental with online technologies.

To inform, present diversity and incite development of an open cultural scene... to encourage the exchange of ideas, development of critical standpoints, and overcoming of stereotypes.

... boosting integration and cultural cooperation in the region

To network cultural professional and artists...

...promotes mobility in the cultural sector by disseminating relevant information....

... aggregates, curates, and amplifies the global conversation online – shining light on places and people other media often ignore.

Aggregate cultural content and syndicate it to media partners

...collecting and disseminating / publishing cultural content via multiple channels

... to monitor cultural trends...

To contribute to the development and strengthening of the regional cultural context with an information and documentation interactive service, to become the support of professionals of cultural management and co-operation throughout the region. To generate interconnections and common settings with similar networks, expanding the access possibilities to different knowledge areas.

to provide information about cultural policy

... to raise awareness about the benefits of cultural heritage to our life and society and mobilise them to help protect it... ..

To offer information on cultural rights and the role of culture in development, present a toolkit for activists in form of documents, articles, projects and other resources

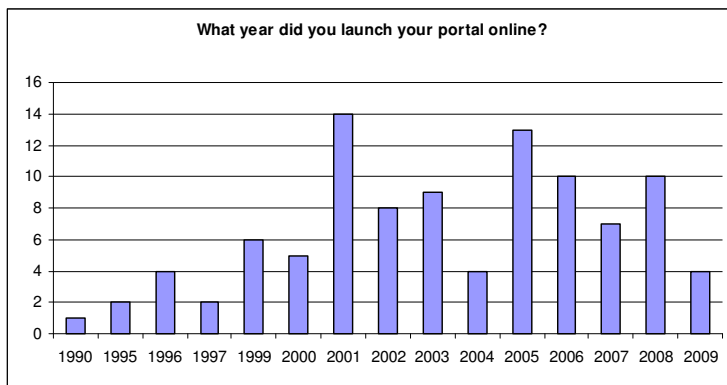
...to serve the global community of professionals involved in research or practical applications on specific development issues...

Web version of radio programme

The building of cultural portals is motivated by desire to inspire users to explore their own culture and various culture related content. The main goal in construction of cultural portals is related to the securing of relevant, reliable and updated information to portals' users. Design of these portals depends on particular cultural context, considering that they are created as a response to the actual sectoral and national interests. It is clear from this mission overview that portals have a role to play in the provision of the virtual resources for the cultural sector. They have a more complex role than just being mere information providers – they are trying to contribute to the construction of new forms of virtual communication and collaboration in the space of digital networks.

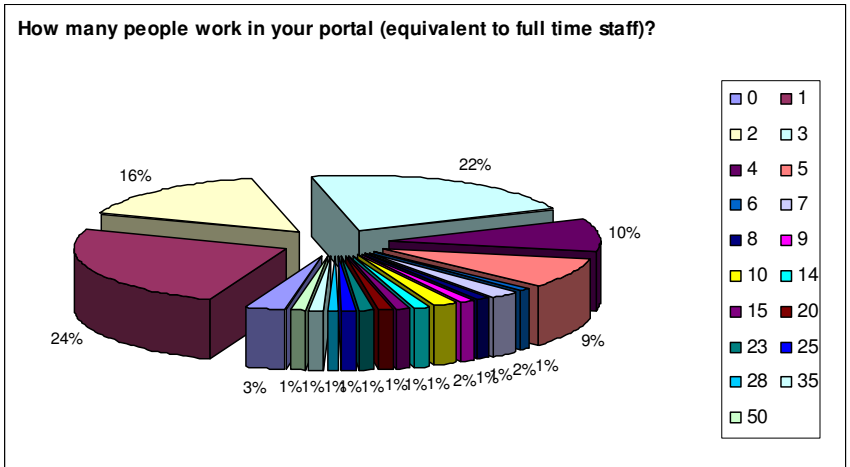
### Development and organizational trends

Even though cultural resources have been present on the Internet since the 1990s, the major move of the cultural sector to the online environment began in 2000 (Graph 4). Of all the portals that answered this survey only 15 were launched prior to the year 2000 – mostly focusing on promoting heritage or cultural cooperation. It seems that starting new virtual initiatives is a steady trend, as data in the survey does not indicate a declining curve. Still the question of sustainability remains: will an increasing number of portals in the same area be able to achieve sustainability for their operation - in competition for their users' attention as well as for sufficient financial support?

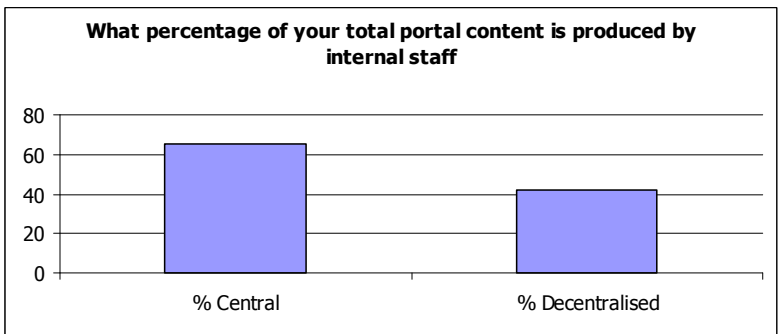


Graph 4

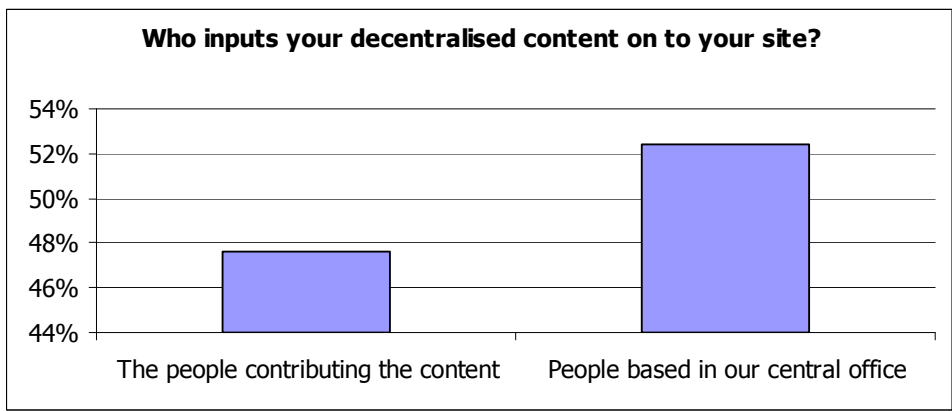
On average cultural portals are not run by big teams (Graph 5) – over 75 % of all responses reported less than 5 working staff, while only 10% have teams with 10 or more staff (5% have staff of 20 or more). Cultural observatories are being maintained by the smallest teams (1 to max 4 people). A similar situation can be seen regarding thematic portals, where majority have teams of up to 4 people and only 12% have a staff of more than 5, while general portals, even though generally not very big, range from 1 to 50 and have - in over 40% of cases - teams of 5 people or more. Still when it comes to the content production portals, staff have significant editorial role - 60% of portals reported that content is produced mostly by their staff (Graph 6). It seems that those publishing more synthesized and analytic information (eg. observatories) are more oriented to producing their own content, while for disseminating various information and announcements a decentralised approach is preferred. Even though they all have a network of partners, users and external collaborators (Graph 8, 9) they still often do not allow them to publish their content on their portal directly. Rather, the information received from them is edited and uploaded by the portal staff (Graph 7). This indicates that portals are aiming to achieve editorial quality of the presented information, but this situation does not take advantage of all the possibilities that the digitally networked environment offers to establishing new distributed working practices.



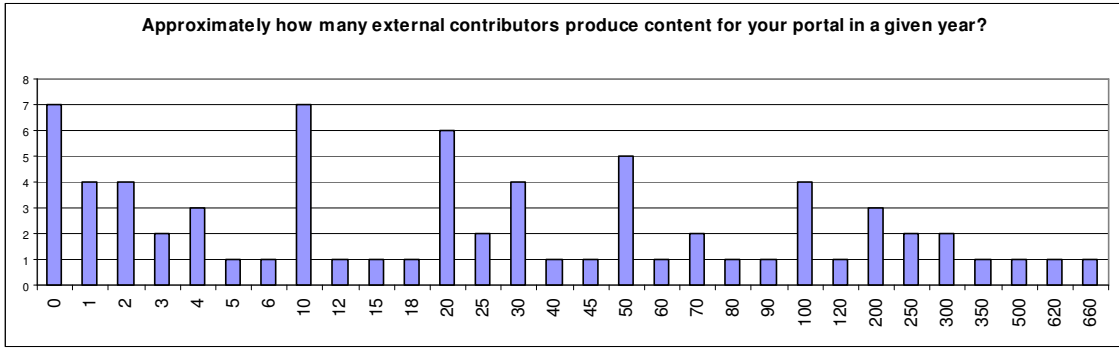
Graph 5



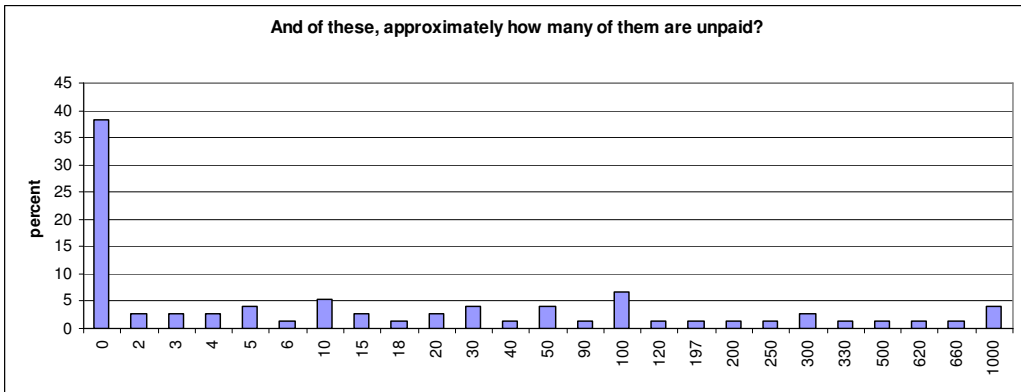
Graph 6



Graph 7



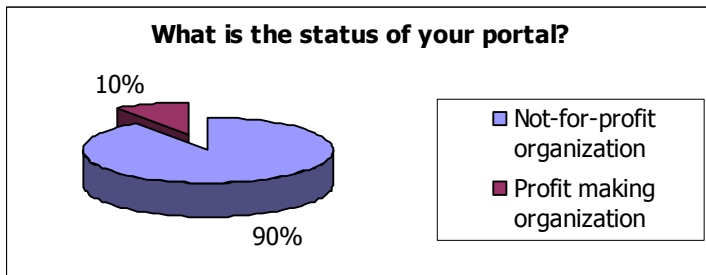
Graph 8



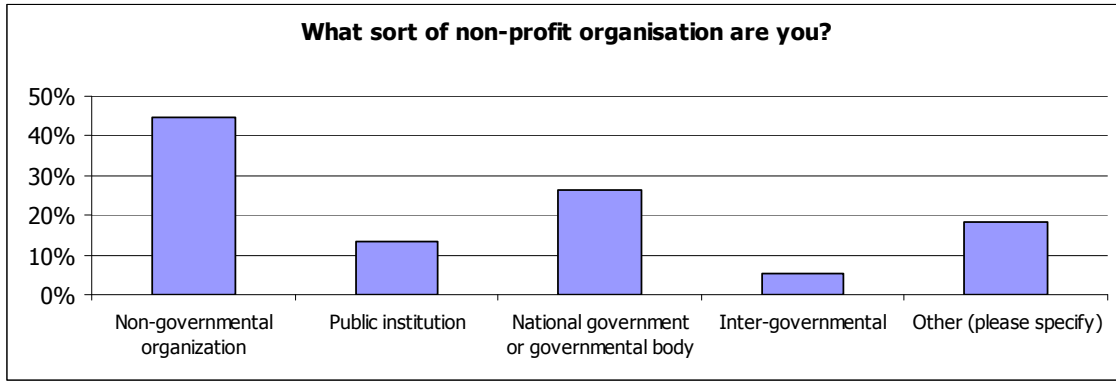
Graph 9

**Portals' status and financing**

By and large the cultural portals seem to be non-profit initiatives (mostly NGO run, governmental initiatives or to a lesser extent run by public cultural institutions (Graph 10, 11). They are usually part of the wider business remit of the organisation running the portal (in over 75% of cases) i.e. the additional activity of the existing cultural organisations or government services using Internet to further support their main mission.

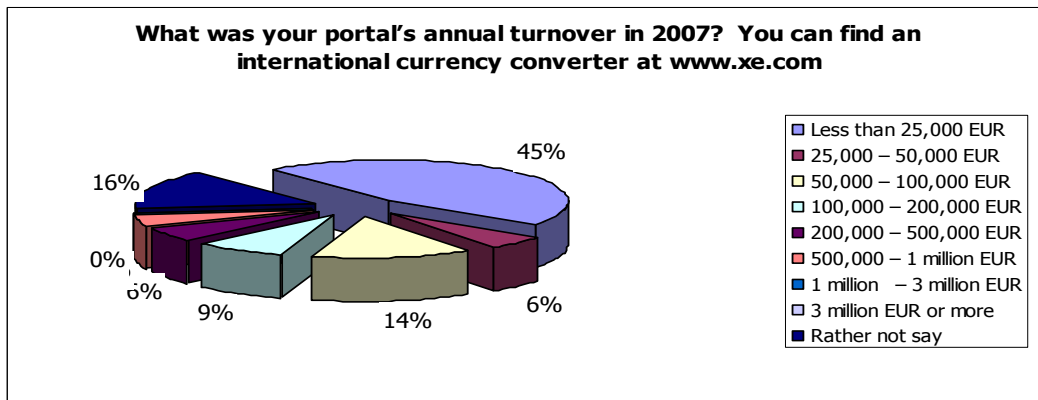


Graph 10

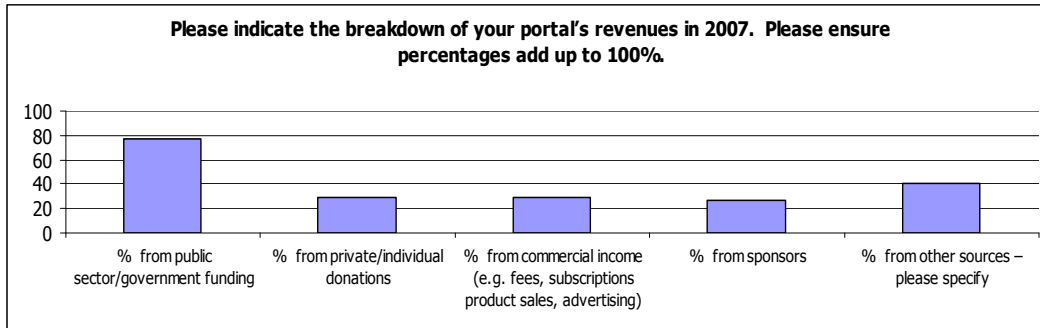


Graph 11

Being mostly not-for-profit and small scale initiatives, it does not come as a surprise that portals' annual working budgets are often correspondingly small. The question related to annual turnover was divided into several scaled categories (Graph 12). 45% answered that their yearly budget is smaller than 25000 Euro, 20% have a budget in the range 25000 – 100000 Euro, 9% over 100000 Euro, 5% over 200000 Euro and 5% over 500000. This question has been skipped by many so the final sample of those answered is rather small - 53 surveyed portals in total provided information about their annual turnover. Being by and large non profit oriented, portals depend for their funding on public budgets that represent the most significant source of income for their work, still they try to fundraise from different available sources to ensure sustainability in their work (Graph 13). Out of 64 who answered the question about the breakdown of their portal revenues, 49 (cca 80%) in total indicated that they get some funding from the public budget. In many cases they are funded largely or entirely from public money: 27 portals get 100 or 99%; 6 portals get 90-95%; 2 portals get 80-85%; 4 portals get 70-75%; 5 portals get 50-60%; and 4 portals get 5-35% of their funding from the public budget. Such a large percentage of public funding is also an indication of the expectations we hold about cultural portals – to be promoters of the public domain. About 30% of surveyed portals indicated that they complement their revenues from donations, sponsors or commercial activities and several indicated that they have not received any funding for their work. A significant proportion of the portals which participated in this survey operate within a modest budget which partly determines the volume and variety of services they can develop. Still, the ability to achieve consistency and quality of content implies significant financial and human resources and survey data about cultural portals' financial and human resources does not seem to indicate a general situation which provides for portals' security of operation and long-term strategic planning and investment.



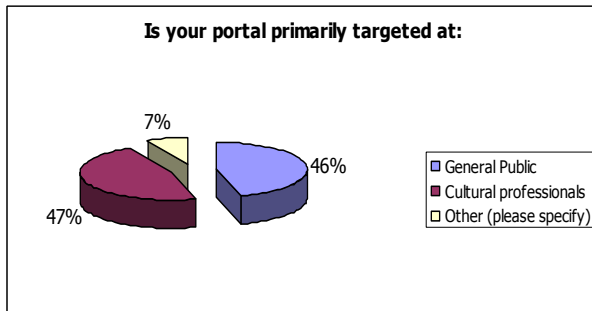
Graph 12



Graph 13

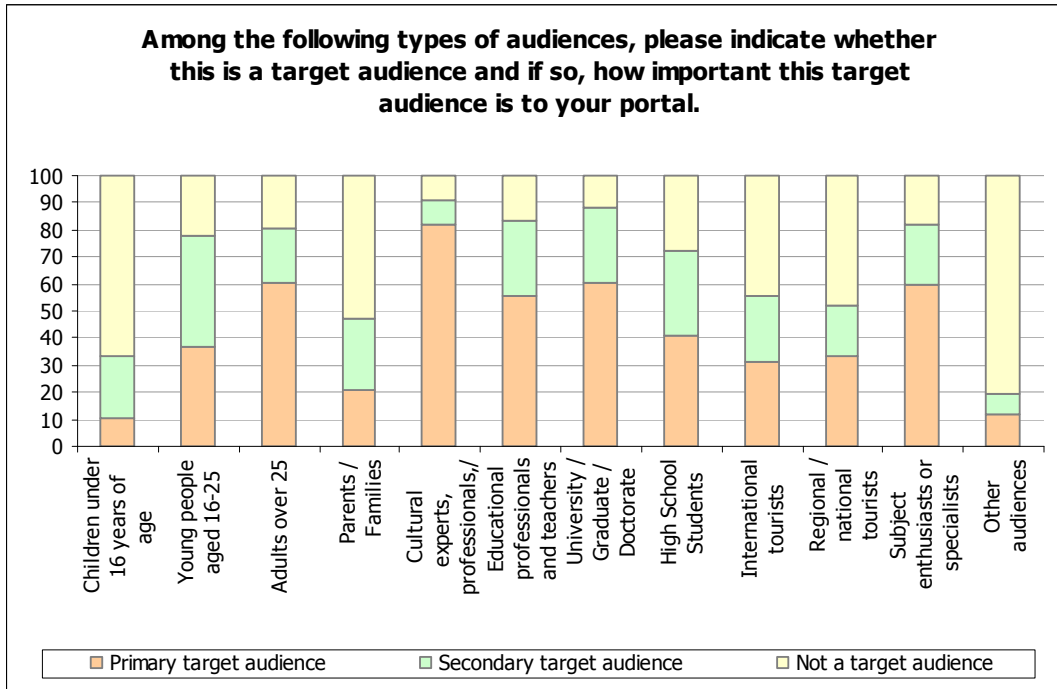
### Targeted audience and geographic scope

Content is the main business of portals. The majority of portals depend for content creation, partly on decentralised sources of information and partly on a network of external contributors in order to achieve comprehensiveness and representation. The success of such aims and the quality of information depend on a network of associated collaborators which is one of the major challenges in the building of cultural portals. Portals are designed as public, private or civil sector projects with the aim of communication with users through the internet. Thus, it is important to identify for which group of users the portal is designed and to identify the interests and needs of its users. Cultural portals are designed for and oriented towards two major groups of users: cultural professionals and the cultural audience (i.e. general public) (Graph 14). For every cultural portal it is essential to link the cultural sector with its audience and it is thus important to secure the sources of information for the content which is published on the portal.



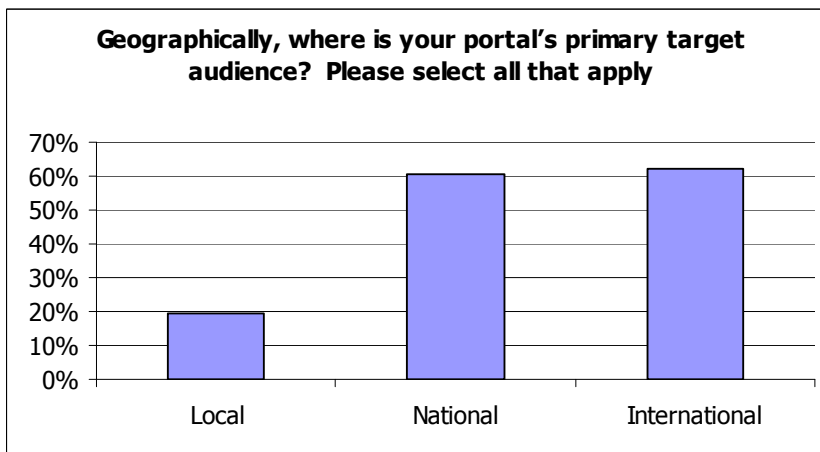
Graph 14

The outcomes of our survey show that majority of portals indicate cultural professionals, art practitioners and cultural researchers as their main users. Among other significant users are university students, general adult population, educational professionals and cultural enthusiasts. Portals rarely have activities targeted for children or for parents/families. Information for potential tourists is also not a priority which indicates that they do not belong to the primarily targeted audience. (Graph 15)

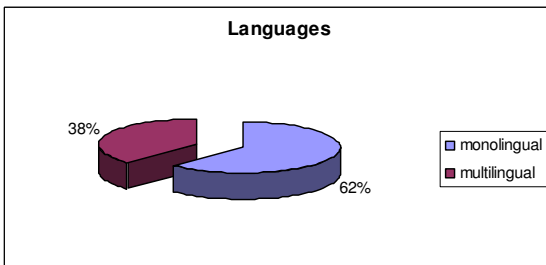


Graph 15

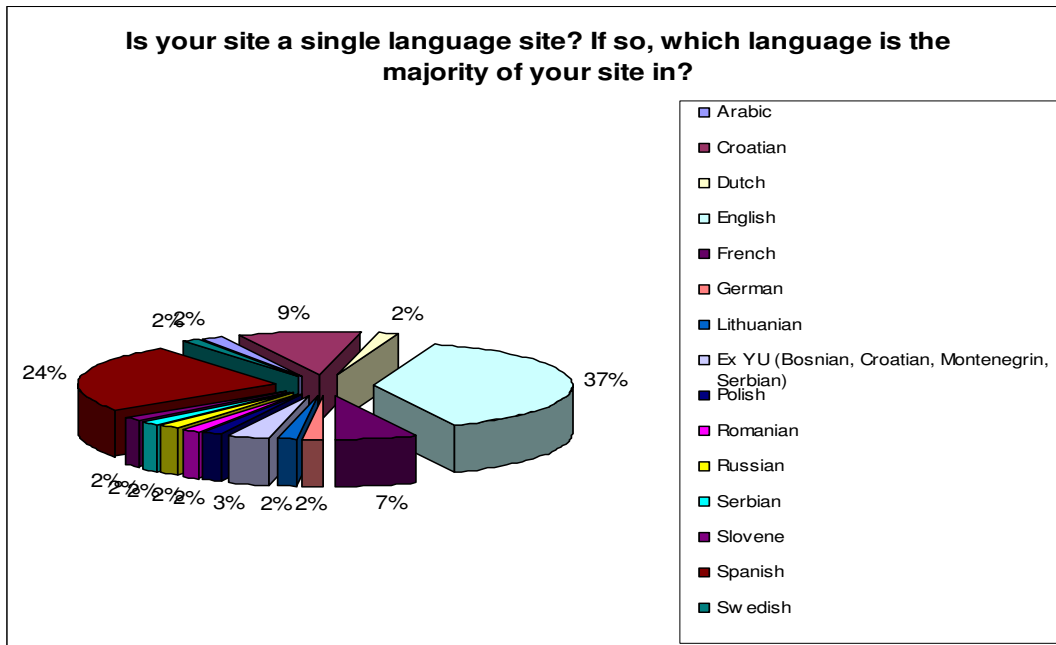
Portals tend to facilitate international reach. Even though many portals' primary scope can be national, international reach is still present in many virtual aspects (even though in some cases as the secondary target audience). This international reach is somewhat limited by language barriers, as over 60% report that their portals are monolingual. The lingua franca of the multilingual portals is, as to be expected, English. (Graph 16, 17, 18, 19)



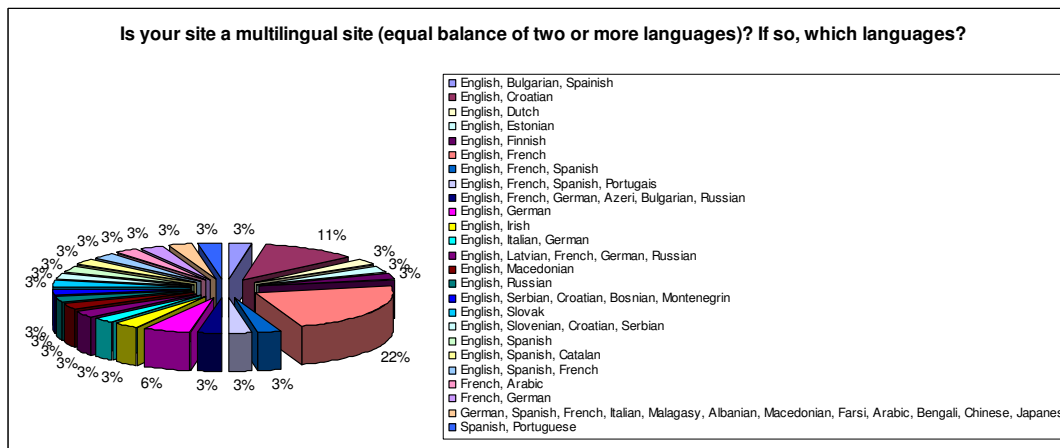
Graph 16



Graph 17



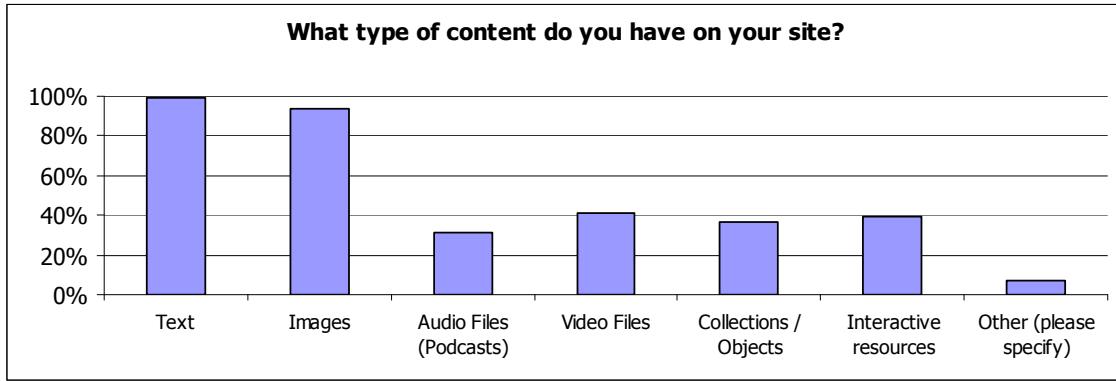
Graph 18



Graph 19

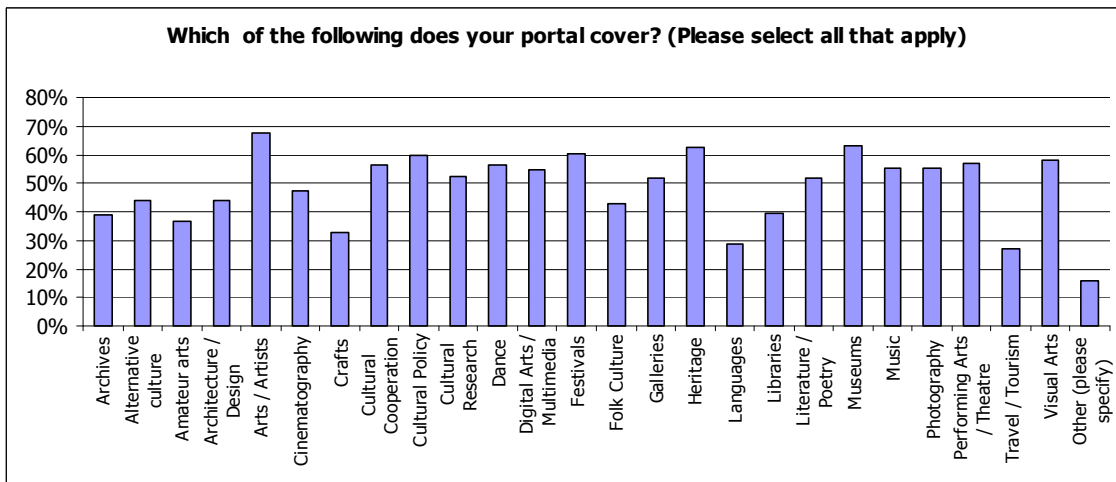
**Content related issues**

Content provided by portals come in different multi-modal formats. It is not easy to distinguish virtual content from its organisational and technology basis. Digital content depends on its concrete organisational/technology basis and its potential, as their interaction defines an ‘information product’. We do not have a simple situation in which the content and a medium can be easily distinguished. Between content and hardware there is always software which is an organisational basis of the ‘user content’. Thus, it is essential to define what sorts of content are provided to users. Our data show that the analysed portals all provide information in textual form, and also provide visual content (images), while audio and video content and interactive resources are presented in a lesser extent (Graph 20).



Graph 20

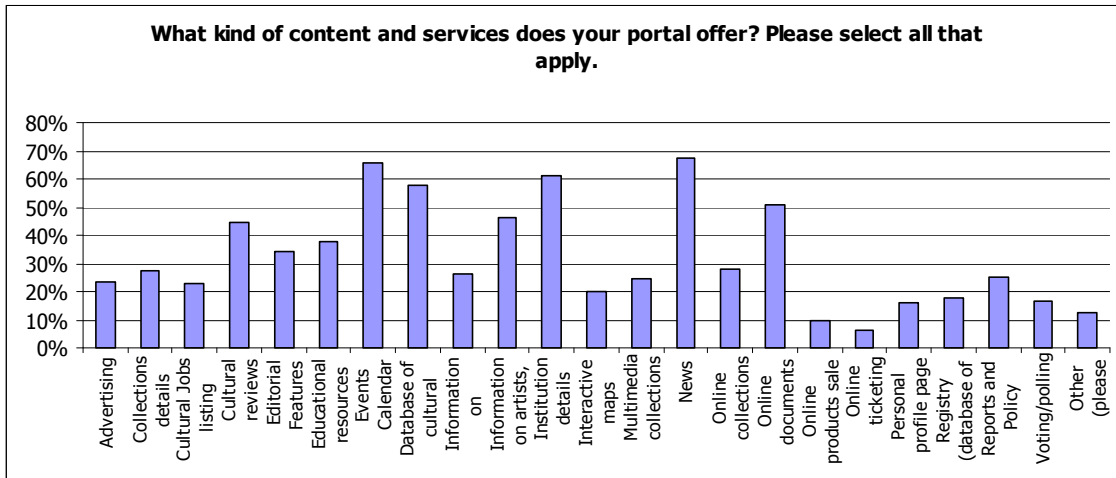
Cultural portals that participated in this survey cover a wide array of topics (Graph 21). Most represented were categories art/artists (69%), museums (66%), heritage (63%), festivals (62%), cultural policy (63%), cultural cooperation (60%), followed by all cultural and art forms, while only amateur arts, crafts, languages and travel/tourism were reported to be covered in less than 40% of answers. In comparison with data obtained in the previous Culturemondo survey there is one field that portals cover significantly more today – the topic of cultural policy. While in the previous survey this topic was covered by 9% of the surveyed portals the latest data indicates that this topic is a wider interest of the portals participating in this survey (63%) – 100% in case of the observatories, 67% in case of the general portals and 45% in case of thematic cultural portals and those that classified themselves as ‘other’ category.



Graph 21

The most common services on cultural portals (more than 50%) are news, calendars of cultural events, information about cultural institutions, online documents, followed by (30-50%) various cultural reviews and editors’ texts, information on artists, educational resources, while the least common services (less than 30%) are collections details, cultural jobs listings, and services based on interactive communication which includes interactive maps, multimedia collections, personal profile pages (Graph 22). Online ticketing is available on a small number of portals and it is similar with buying other products online. An interaction option is available on a small number of portals although numerous examples from other virtual services<sup>2</sup> show that the services based on interactive options are among the most popular, as they provide an opportunity to their users to communicate, express their opinions, publish and exchange their own content.

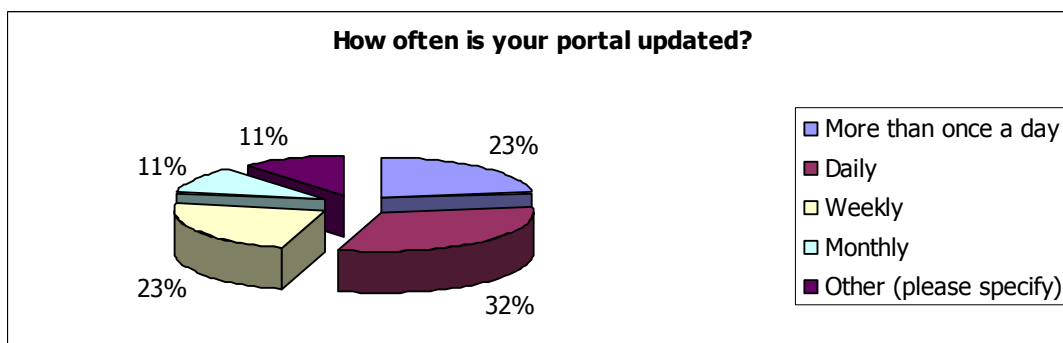
<sup>2</sup> See the list of the most visited websites: <http://www.alexa.com/>



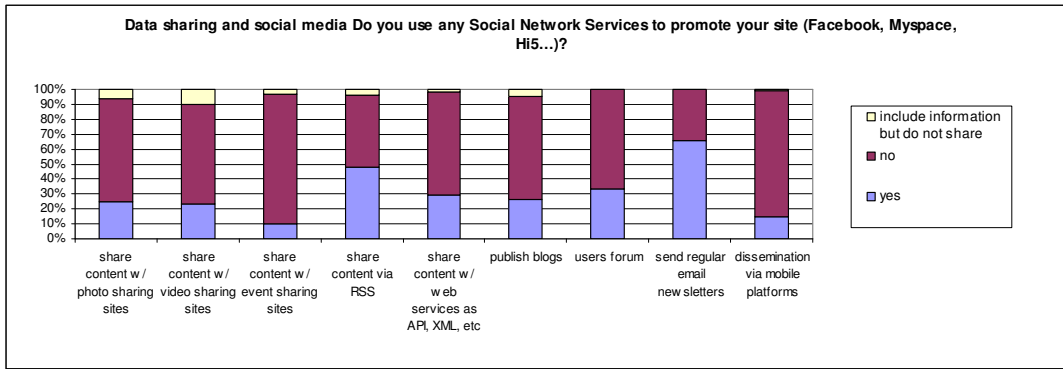
Graph 22

### Managing portals – updating, promoting, sharing

More than half of surveyed portals update their content at least daily (55%), weekly updates were reported in 23% of answers and monthly updates in 11% (Graph 23). More irregular updates in 'other' category were reported in 11% of cases. The dynamics of content updates indicate portals' interest to motivate regular visits of their users. However, mere regular content updates do not secure users' interest. In order to engage them it is essential to position a portal strategically among numerous other virtual resources. Thus, portals seek strategies to efficiently communicate with their users, while the users search and select information they find relevant. These strategies are different. Efficient sharing of information in the networked environment cannot be overlooked (Graph 24). The most common mode of communication between portals and their users is an electronic newsletter (64%). They provide regular daily, weekly or monthly information about new activities. Use of RSS is also regarded as an efficient means of communication with users (47%). About 30% of portals have users' forums and share content from their site with other web services such as API, XML, etc. While sharing through different photo, video or event sharing sites, or blogs still represents sporadic portals' activities (cca 20%).

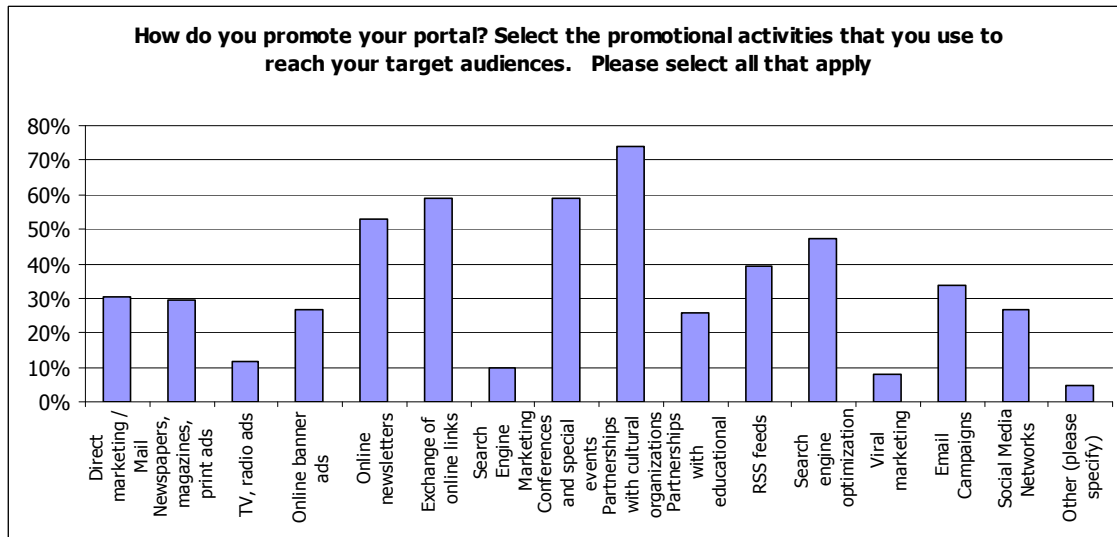


Graph 23



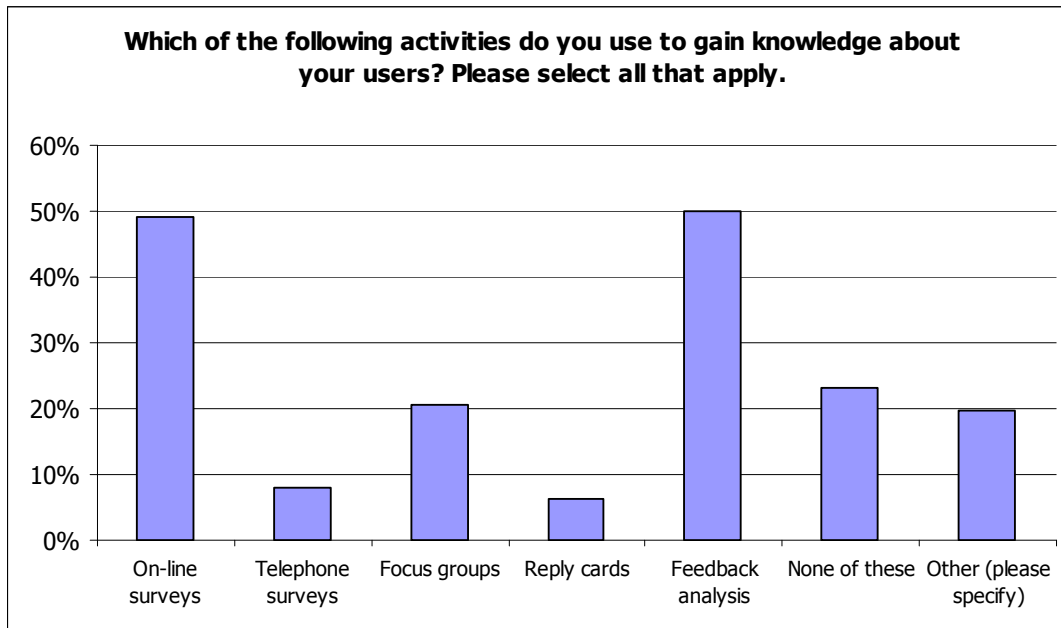
Graph 24

The important mode of promotion of portals is their close collaboration with cultural institutions, networks and associations (76%) in order to establish portals as a resource of relevant information and a communication channel through which they can distribute (or receive) their news. This promotion is not necessarily limited to the virtual sphere but is often conducted via conferences and other events. Other kinds of promotion in the digitally networked environment are distributed in a variety of ways. Nearly half of the analysed portals address their users via online newsletters or exchange of links with portals which target similar audiences. A number of portals (approximately 40%) seek to improve their position by optimising their web pages for mega search engines such as Google (search engine optimisation) or via RSS. Email campaigns, social media networks, promotion through mainstream media, etc. represent less used means of promotion at this moment. (Graph 25)



Graph 25

In order to be effective in communication with their users, portals need to know who their users are and what they need. Do their actual users coincide with their targeted audience? The virtual sphere has enabled communication with a great number of users who are not physically present and easily identifiable. Their presence is virtual and thus they are often anonymous users. It is therefore important to identify users profile and ways and frequency of use of portal's services. Data from this survey indicates that online surveys and feedback analysis are the two most popular way of learning about users (Graph 26). Still, this is not sufficient and portals must find better ways of measuring the success of their activities.



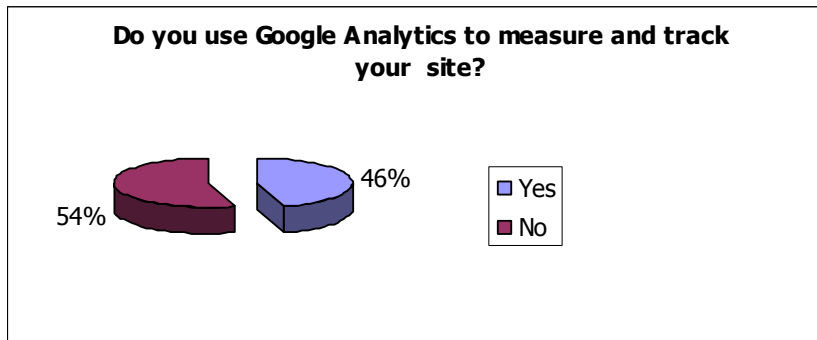
Graph 26

Measuring the success of portals is a complex process which requires the definition of measurement parameters as an achievement of certain goals (as being not-for-profit initiatives their success is not defined as a purely financial parameters). The existing Web metrics programs provide statistical data of visits to web sites and provide information on various aspects of the users' activities on the site. The success of virtual projects can be measured against various parameters. These criteria can be - for example the wide popularity of a portal and its name as a sort of brand-awareness parameter for a particular theme; the number of content downloads from a particular portal, the number of links a portal provides, financial sustainability (cost per visit) of a portal, etc. In previous Culturemondo surveys we have tried to identify the extent of the web metrics use by cultural portals in order to measure their success.

Common indicators of success were number of visits, number of visitors and number of page views, as well as geographic location (users' country and city of origin), and number of hits. Portals also measured the success and efficiency of their network through visits received via established links with other websites and they monitored number of regular users of their services. Portals also observed comparative data of the number of users from their host countries compared to users from other countries. They also registered their users' starting (landing) page and their navigation of other virtual resources as well as registering other web pages their users navigate from their web site.

They considered as relevant indicators, their newsletter subscriber lists and keywords which lead users to their web pages. Some analysed portals provided subscription options to their users and thus collect data about them. They also measured their site rankings according to specific keywords at the mega search engines. The least used measurement indicator in the previous survey was a number of the portal contributors and a number of their contributions. Even though portals used different available web metrics programmes this did not seem to be perceived as very important, as it seems that what they lacked was understanding on how to interpret this data and how to use it to achieve some positive changes.

This year's survey asked a question about the use of the Google Analytics for measuring the performance and success of the portals in question. Less than half portals are using it. As only a small number of portals answered (31 in total) this data represents too small sample to be analysed in a relevant way. The issues related to the measurement of success remain to be further investigated in future research.



Graph 27

## Summary of general trends

Presence of the cultural sector through diverse web resources has been one of the important aspects of digital culture. In the analysis of digital culture, structures formed in the virtual space such as portals, virtual social networks, blogs and wiki services are of vital importance. These structures have complex roles: they are not just mere information providers, but they are expected to contribute to the construction of new forms of virtual communication and collaboration. The 2009 Culturemondo's cultural portals survey provided information on standard modes of operation in the domain of cultural portals. Even though the survey cannot be considered comprehensive, it has provided insights into current trends related to development of cultural portals.

- From the mission of portals participating in this survey it is visible that the building of cultural portals is motivated by desire to inspire users to explore their own culture and various culture related content. Common to many portals is that their purpose is general promotion of culture or specific cultural areas. Their main goal is related to securing of the relevant, reliable and up-to-date information to their users. Cultural portals have important role in the provision of virtual resources for the cultural sector. In addition to being information providers, they are also trying to facilitate cooperation in the cultural sector and to contribute to the construction of new forms of virtual communication and collaboration in the space of digital networks.
- Cultural portals can be placed within 3 main categories – those covering many cultural themes (general cultural portals), specialised thematic portals for a particular theme or cultural area, and cultural observatories monitoring cultural trends. The general cultural portals and specialised portals are predominating categories, and cultural observatories form a smaller part of virtual resources.
- Predominantly, cultural portals are a non-profit, mostly NGO initiatives and they are dependant on government as a significant source of funding. This clearly points out the wide interest of different stakeholders (not only government or public cultural institutions but often NGOs) in the area of culture (a situation which also ensures a pluralism of views and cultural diversity) and the expected role of cultural portals as structures for promoting public access to culture and preserving culture in the area of public domain, thus contributing to establishing democratic and inclusive “knowledge societies”, rather than commodified and commercialized ‘information society’.
- Cultural portals operate on rather limited resources. Usually they are part of the wider business remit of the organisation running the portal (in over 75% of cases) i.e. they often represent additional activity of existing cultural organisations, networks or government services who are using the Internet to further support their main mission. Portals are not run by big teams: in over 75 % cases they reported having less than 5 working staff, while only 10% have teams with 10 or more staff. Portals’ annual working budgets are often small. The ability to achieve consistency and quality of content implies significant financial and human resources and cultural portals’ financial and human resources do not seem to indicate a general situation which provides for portals’ security of operation and long-term strategic planning and investment. This begs the question of how to ensure their long-term viability and how to ensure that cultural policies recognise portals’ contribution in their role of providing access to culture – linking culture with the citizens and ensuring their active participation, as

well as portals' role in developing a public domain information resources, and ensuring that diversity of cultural content gets communicated worldwide.

- In order to create sustainable virtual cultural resources there is a strong need for portals to focus on their users. A user-focused approach such as this can contribute to defining clear developmental strategies of portals. Cultural portals are oriented to two major groups of users: cultural professionals and cultural audience (i.e. general public) A majority of portals indicate cultural professionals, art practitioners and cultural researchers as their main users. Surveyed cultural portals rarely have activities targeted for children, for families, for tourists or any other demographic group that is not somehow linked with the cultural field. There is room for further defining portals towards various niche markets. Recognising different target users and catering for their specific needs is essential for the successful functioning of cultural portals.
- Cultural portals' reach is not limited by geography but rather by language barriers. Even though many portals primary scope can be national, international reach is present even though in some cases as the secondary target audience. This international reach is somewhat limited by language barriers as over 60% portals are monolingual.
- To be able to cater for their users' needs and in order to achieve the comprehensiveness and representation of their content, a majority of portals depend for their content creation on a combination of centralised and decentralised approaches. 60% of portals reported that content is produced mostly by portal staff, i.e. in a centralised fashion. Even though they all have a network of partners, users and external collaborators, portals often do not allow their collaborators to publish their content on the portal directly. Often the information received from them is edited and uploaded by the portal staff. This indicates that portals are aiming to achieve editorial quality of the presented information, but in this situation portals do not take advantage of the possibilities that the digitally networked environment offers for establishing new distributed and participatory working practices. Interactivity still presents challenge for cultural portals because such openness challenges their editorial policies.
- Cultural portals cover a wide array of cultural topics. The mostcovered categories are art/artists, museums, heritage, festivals, cultural policy, cultural cooperation... While in the previous Culturemondo survey the topic of cultural policy has been covered by 9% of the surveyed portals the latest data indicate that this topic is of the wide interest of the portals participating in this survey (63%). A majority of cultural portals base their content on news, calendars of cultural events, information about cultural institutions, different studies and online documents, while the least common services (less than 30%) are services based on interactive communication.
- The majority of portals regularly update their portal content - more than half of surveyed portals update their content at least daily, and one quarter provide weekly updates. Dynamics of content updates indicates portals' interest to motivate regular visits of their users.
- In order to engage with users portals are trying to promote and to position themselves strategically among numerous other virtual resources. The most common mode of communication between portals and their users is an electronic newsletter, and use of RSS is also regarded as an efficient strategy of communication with users. About one third of portals have users' forums and share content from their site with other web services (API, XML, etc.). Sharing through different photo, video or event sharing sites, or blogs represents sporadic portals' activities. The important mode of promotion of portals is their close collaboration with cultural institutions, networks and associations in order to establish portals as a resource of relevant information and a communication channel through which they can distribute (or receive) their news. In an online environment portals use different strategies. Nearly half of the analysed portals exchange links with portals which target similar audiences. About 40% of portals seek to improve their position optimising their web pages for mega search engines such as Google (search engine optimisation). Email campaigns, social media networks, promotion through mainstream media, etc. represent less used ways of promotion at this moment.

**ANNEX - List of portals participated in the Third Culturemondo International Survey about cultural portals (November 2008 – June 2009)**

1.	www.culture.info	www.cutlure.info
2.	Culture24	www.culture24.org.uk
3.	Europa Nostra	www.europanostra.org
4.	LabforCulture	www.labforculture.org
5.	Global Voices	globalvoicesonline.org
6.	SEECult.org Portal for South-East European Culture	www.seecult.org
7.	Museums of Russia	www.museum.ru
8.	plurio.net - the cultural portal of the Greater Region	www.plurio.net
9.	euromuse.net - The European exhibition portal	www.euromuse.net
10.	Help for Artist	www.helpforartists.org
11.	DISMARC	www.dismarc.org
12.	Kulturportal Deutschland	www.kulturportal-deutschland.de
13.	Southeast Europe: People and Culture	www.southeast-europe.eu
14.	Culture.ee - calendar of Estonian cultural events	www.culture.ee
15.	CULTURENET CROATIA	WWW.CULTURENET.HR
16.	Croatian portal for visual arts Akademija-Art	www.akademija-art.net
17.	Croatian cultural heritage	www.kultura.hr
18.	IETM	www.ietm.org
19.	On The Move	www.on-the-move.org
20.	Taiwan culture portal	www.culture.tw
21.	Culture360	www.culture360.org
22.	Centro Regional para la Salvaguardia del Patrimonio Cultural Inmaterial de America Latina - CRESPIAL	www.crespial.org
23.	NZLive.com	www.nzlive.com
24.	Observatory of Cultural Policies in Africa	ocpa.irmo.hr/index-en.html;http://www.ocpanet.org
25.	Foro Mexicano de la Cultura	www.foromexicanodelacultura.org
26.	Ecultura	www.ecultura.gob.mx
27.	ChihuahuaMexico.com	chihuahuaMexico.com
28.	Sistema de Información Cultural del Conaculta	sic.gob.mx or sic.conaculta.gob.mx
29.	Portal de la Cultura Pinera	www.pinera.cult.cu
30.	Hero	www.hero.cult.cu
31.	Atenas	www.atenas.cult.cu/
32.	Action Culturelle Algérienne	www.alger-culture.com
33.	Portal Iberoamericano de Gestión Cultural	www.gestioncultural.org
34.	culture.fr	www.culture.fr
35.	Cultural Realms	culturalrealms.typepad.com
36.	Muzika.hr	www.muzika.hr
37.	www.booksa.hr	www.booksa.hr/
38.	Sistema Nacional de Información Cultural (National Cultural Information System)	www.sinic.gov.co
39.	Panorama Kultur	www.pk.org.pl/
40.	Collections Link	www.collectionslink.org.uk
41.	Dak'Art, Biennale de l'art africain contemporain à Dakar, Sénégal	biennaledakar.org
42.	Culture Grid	N/A (under development)
43.	Kulturinstitutionen in Mittel-, Ost- und Südosteuropa	www.cee-culture.info
44.	Biblioteca Nacional de Cuba José Martí	www.bnjm.cu/
45.	Soycubano	www.soycubano.com
46.	TARA – Trust for African Rock Art	www.africanrockart.org
47.	CirculArt	www.circulart.org/
48.	Arts in Africa	www.artsinafrica.com
49.	Your window on Finnish Environmental Art	environmentalart.net/
50.	Kherdja	www.kherdja.com

51.	Turkish culture	turkishculture.org
52.	The Creative City Network of Canada	www.creativecity.ca
53.	National Museum of Ireland (4 sites/Collections)	www.museum.ie
54.	Recursos Culturales	www.recursosculturales.com.ar/
55.	Virtual Museum of Canada (VMC)	virtualmuseum.ca
56.	CIMEC	www.cimec.ro
57.	Russian Theatre Life in Brief / Rtlb.ru	www.rtlb.ru
58.	International Federation of Arts Councils and Culture Agencies	www.ifacca.org
59.	ciciba	www.ciciba.org
60.	Museum.SK - Slovak Museums, Galleries and Castles	www.museum.sk
61.	Latvian Culture Portal	www.culture.lv
62.	Montenegrina Culture Portal	www.montenegrina.net
63.	Deutsche Kultur international	www.deutsche-kultur-international.de
64.	Dutch Centre for International Cultural Activities (SICA)	www.sica.nl
65.	Cultural Policy Institute	www.cpolicy.ru
66.	Culture.be	www.culture.be
67.	Museums of Lithuania	www.muzejai.lt
68.	Cultuurnetwerk Nederland	www.cultuurnetwerk.nl
69.	The Culture Portal	culture.gov.au/
70.	Culturelink Network WWW Resource Centre	www.culturelink.org/
71.	CUBARTE - Portal de la Cultura Cubana	www.cubarte.cult.cu
72.	The Egyptian Database of Folklore	beta.culnat.org/Maknaz/home2.aspx
73.	www.culnat.org	www.culnat.org
74.	Observatório das Actividades Culturais	www.oac.pt
75.	Dnevni Kulturni Info	www.dnevnikulturni.info/
76.	Te Ara - Encyclopedia of New Zealand	www.TeAra.govt.nz
77.	a4a	a4a.info
78.	Cultural Policy Institute Website	www.cpolicy.ru
79.	dubrovnik festival	www.dubrovnik-festival.hr
80.	Culture in Macedonia	www.culture.in.mk
81.	Arts-Planet	www.arts-planet.net
82.	Kulturpunkt.hr	www.kulturpunkt.hr
83.	Culture for Development (C4D)	portals.kit.nl/smartsite.shtml?ch=FAB&id=7949
84.	www.danceincroatia.com	www.danceincroatia.com
85.	Portal on Cultural Rights and Human Development	www.culturalrights.net
86.	ConnectCP	www.connectcp.org
87.	TkH-GENERATOR.NET - regional web platform for performing arts	www.tkh-generator.net
88.	Cité Nationale de l'histoire de l'immigration	www.histoire-immigration.fr
89.	HIDRA	www.hidra.hr
90.	World Heritage Portal	whc.unesco.org
91.	Sudplanet	www.sudplanet.com
92.	Artservis	www.artservis.org
93.	Evrokultura	www.evrokultura.org
94.	Kulturnät Sverige / Culturenet Sweden	www.kultur.nu
95.	Red Cultural Cibernetica	www.cibernetica.cl
96.	ILAM	www.ilam.org
97.	Compendium of Cultural Policies and Trends in Europe	www.culturalpolicies.net
98.	BAM-Portal	www.bam-portal.de
99.	Collections Australia Network	www.collectionsaustralia.net
100.	Santa Fe Arts & Culture	www.santafeartsandculture.org
101.	Letralia	www.letralia.com

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