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THE DEVELOPMENT OF THE E-CULTURE MARKET: PERSPECTIVES FROM POLISH CONSUMERS

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Purpose: The aim of the article was to explore the development of the e-culture market from the perspective of Polish consumers.
Design/methodology/approach: The objectives were achieved by conducting a theoretical review of the scientific literature on the e-culture market, supplemented by research on Polish consumers' opinions regarding the functioning and usefulness of the e-culture market. The research was conducted using an online survey technique among 120 Polish consumers aged 20 to 74 at the turn of 2022 and 2023.
Findings: The research results indicated a diverse approach among consumers towards using services and products in the e-culture market. It also identified which institutions offering e-culture services are most popular among digital consumers. The study revealed the most frequently undertaken activities by consumers in the use of e-culture and highlighted the significant impact of virtuality in the context of providing e-culture services.
Research implications: In the future, it would be interesting to expand the scope of the research to other countries in Europe or around the world, or to conduct studies on specific demographic groups (e.g., young people or seniors) to examine how e-culture influences their use of cultural services or products in everyday life.
Originality/value: The article makes a unique contribution to understanding the functioning and usefulness of the e-culture market among Polish consumers. The originality of the topic addressed in the article stands out due to the fact that digital markets (including the e-culture market) are relatively new phenomena, and therefore not fully explored. Expanding knowledge in this area will help to understand consumer attitudes towards the e-culture market and identify various socio-economic aspects.
Keywords: e-culture, e-market, e-consumers, digital, virtuality, Poland.
Category of the paper: research paper.

1. Introduction

The dynamic development of technology and the numerous processes aimed at digitizing various aspects of contemporary life have found their justification in the realm of broadly understood culture. In the face of ubiquitous digitalization, there has arisen a need to transfer many cultural dimensions to the web or create them specifically for digital consumers.

Entities within the e-culture market, encompassing both traditional cultural institutions and newly established digital platforms, play a crucial role in shaping, promoting, and distributing various forms of art, culture, and heritage in the online environment. As society increasingly digitizes its life, these entities transform, adapting to prevailing trends and new challenges.

This article aims to present the functioning of the e-culture market and its institutional entities, as well as to illustrate the development of the e-culture market in Poland in recent years. In the context of a changing technological landscape and social preferences, the role these entities play in the digital world of culture will be analyzed. Through an interdisciplinary review of literature and analysis of information obtained from original research, it will be possible to reveal the complexity of actions undertaken by e-culture entities and outline potential directions for their future development.

2. Literature review

2.1. The E-Culture Market as a Basis for Research

The e-culture market, like any digital market, despite its constantly expanding service offerings and observed developmental dynamics, can be characterized as a relatively young phenomenon. The mentioned developmental dynamics of the e-culture market are conditioned by technological progress and its attractiveness and accessibility to potential consumers (Van der Ploeg, 2003).

The theoretical understanding of culture over the years have led to the development of numerous approaches to this concept. A review of Kroeber and Kluckhohn's conceptions of culture resulted in the creation of types of definitions that emphasize six different aspects of culture (descriptive-enumerative, historical, normative, psychological, structuralist, and genetic definitions) (Gruchoła, 2010; Sobocińska, 2015). In the literature, one can find a modified typology, where a uniform classification criterion is adopted — the way culture is understood, considered fundamental for a given humanistic discipline (Włodarczyk, 2003):

- Anthropological approach – culture as the totality of human creations and actions, free from value judgments and subjective as well as psychological content, fulfilling social and instrumental functions concerning the entire system and the biological needs of the human organism.
- Philosophical approach – culture as a supra-individual intellectual reality.
- Historical approach – emphasizing the historical conditions of cultural phenomena, the precise spatial-temporal localization of the studied phenomena, capturing their variability over time, the mechanisms of cultural transmission, and the issues of cultural transformations.
- Sociological approach – culture as patterns of interaction between individuals and groups.
- Psychological approach – emphasizing the mutual influences of personality and culture.

The e-culture market is based on specific relationships occurring between entities. Some of these entities offer culture, while others consume it, fulfilling their needs by using specific services from a wide range of cultural offerings (Sobocińska, 2008). The cultural market can be defined as the totality of exchange relationships occurring between entities offering goods and services that satisfy needs in the field of culture, and consumers and institutions purchasing cultural goods and services (Wolny, 2023).

It is worth clarifying the definition of an e-consumer. An e-consumer is defined as "an individual who expresses and satisfies their consumption needs through products (goods and services) purchased online" (Jaciow, Wolny, 2011). A digital consumer exhibits purchasing behaviors exclusively online (Jaciow, Wolny, 2022). The most common subject of purchase is services or products.

The entities in the e-culture market can be divided into those related to supply and those related to demand (Janeczek, 2001). It is worth mentioning that the form of supply is a consequence of the activities of entities offering services or specific products (Przybylska-Kapuścińska, 2011). Entities on the supply side of the digital culture market, understood as sellers or providers, include, for example:

- Cultural institutions engaged in creating cultural services or processing existing cultural goods to make them available to consumers.
- Enterprises and cultural institutions that allow browsing of their offerings, checking schedules, or purchasing tickets for various cultural events.
- Institutions or enterprises responsible for running portals and websites dedicated to the broadly understood culture (Wolny, 2013).
- Entities that offer popular culture resources, Entities providing services related to digital culture, including intermediaries and information providers (Sokołowski, 2007).
- Artists who create and share their cultural goods in the digital sphere.

Entities demanding in the e-culture market can be characterized as individuals interested in using or consuming goods or services of broadly understood digital culture. These entities include:

- Individual consumers, who are interested in accessing the wide range of cultural offerings available online.
- Institutional consumers, who utilize the service offerings proposed by public institutions such as cinemas, theaters, museums, philharmonics, art galleries, operas, etc. (Sokołowski, 2007).
- Households (or their residents), who have access to cultural resources available on the Internet, for example, through subscribing to a streaming service that offers a wide cultural database (Wolny, 2016).

The economic aspects of the e-culture market can be considered from two perspectives: as a digitized good or service that responds to specific cultural needs, or as an institutional arrangement (Piotrowska-Marczak, 1987). The first perspective is also understood as tangible and intangible services that directly satisfy consumer needs.

Material goods, when reduced to the virtual space, lose their physical value and become intangible products for humans. For instance, the possibility of taking a virtual tour of a museum, where one can pass by artworks and observe them through a smartphone or laptop screen, does not allow for direct interaction with them. Consequently, it can be stated that e-culture services, as intangible goods, are characterized by the lack of tangible results from interacting with them. Much in this case may depend on the consumer's perception and imagination (Trzeciak, 2011).

3. Scope of research

An online survey technique was used to conduct the e-culture market research. The questionnaire for the study was designed, tested, operationalized, and posted on the online platform webankieta.pl. The research was conducted on a sample of 120 consumers aged 20 to 74 who use digital culture services. For data analysis purposes, respondents were divided into four age groups: consumers up to 23 years old, those aged 23-27, those aged 27-31, and consumers over 31 years old. This division was aimed at achieving an even distribution of group sizes based on the respondents' ages.

The research was carried out between December 2022 and February 2023. Respondents were reached by posting an invitation encouraging them to fill out the questionnaire on social media, specifically on facebook.pl. The invitation included information about the purpose of the research, contact details for the research coordinator, a brief description of who was conducting the research, and the estimated time required to complete the survey.

The questionnaire designed for individual consumers consisted of six pages (including the initial screen and thank you note). It was divided into two substantive parts. The first part, which included 19 questions (both closed and open-ended), sought consumers' opinions on the broad use and functioning of the e-culture market in Poland. The second part contained six questions aimed at obtaining sociodemographic data of the surveyed consumer group. Respondents were asked about their age, gender, education, area of residence, subjective assessment of their financial situation, number of people in the household, and professional activity.

Some of the results of the research were previously used in the author's thesis.

4. Research results

Based on the conducted research, the demand for services offered by cultural institutions and for e-culture can be characterized. The responses provided in the questionnaire help understand consumers' attitudes towards accessing cultural goods, the offerings of cultural institutions, purchasing services, and other significant aspects related to the discussed topic. This, in turn, illustrates how e-culture entities are developing in the market.

Cinema is the most popular among consumers of the cultural institutions listed, with one in four respondents declaring frequent use of cinema services. The second most frequently visited institution is the theater, with almost one in ten respondents indicating that they often use theater services. Philharmonic orchestras and opera houses are notably the least popular among audiences, with 57.3% and 71.8% respectively never having used the services of these institutions (Table 1).

Table 1.
Frequency of using cultural institutions by consumers (in %)

Item	Very often	Often	Sometimes	Rarely	Never
Theater	1.0	9.7	24.3	52.4	12.6
Cinema	3.9	25.2	45.6	23.3	1.9
Museum	-	4.9	33.0	48.5	13.6
Art Gallery	-	3.9	16.5	43.7	35.9
Philharmonic Orchestra	-	1.9	6.8	34.0	57.3
Opera House	-	1.2	6.8	21.4	71.8

Source: own study.

To determine consumer attitudes towards the e-culture market, one can analyze how consumers fulfill their cultural needs. The various activities along with their usage frequency allow for identifying aspects that constitute the demand conditions of the e-culture market. The analysis conducted shows that consumers most commonly satisfy their cultural needs by listening to music and watching movies and TV series online (this applies to approximately 80-90% of respondents regardless of age). For the age groups of 27-31 and above 31 years old, reading books also holds significant importance, with 81.2% and 78.3% of respondents in these age groups, respectively (Table 2).

Table 2.
Ways of satisfying cultural needs by age of respondents (in %)

Item	Total	Respondents by age			
		up to 23	23-27	27-31	above 31
I take part in cultural events, art exhibitions, concerts etc.	42.8	53.8	46.2	44.4	21.0
I go to the cinema	62.7	61.5	46.2	77.8	58.2
I go to the theater	37.2	25.6	15.4	48.1	42.2
I listen to music	87.5	84.6	92.3	96.3	78.5
I watch movies/series online	85.8	82.1	84.6	96.3	75.0
I read books	72.3	61.5	63.9	81.2	78.3
I read e-books	27.6	17.9	30.8	29.6	26.2
Others	5.1	2.6	-	7.4	4.8

Source: own study.

Consumers pursue specific goals online. Fulfilling cultural needs often takes place in the virtual space. Based on the conducted research, the most frequently pursued goals have been identified. The vast majority of respondents indicated that listening to music is the primary cultural goal pursued online. Nearly identical results (over 92%) were found for this activity in the age groups up to 23 years old, 23 to 27 years old, and 27 to 31 years old. In the group of people over 31 years old, watching movies online is the most popular activity Those activities declare 90% of respondents (Table 3).

Table 3.
Cultural goals pursued online by consumers by age (in %)

Item	Total	Respondents by age			
		up to 23	23-27	27-31	above 31
I watch movies	88.3	79.5	84.6	96.3	90.0
I listen to music	91.9	92.3	92.3	92.6	84.3
I read e-books	24.2	28.2	30.8	33.3	19.6
I watch arts	21.6	12.8	23.1	25.9	23.8
I watch theatrical performance	15.1	7.7	7.7	14.8	24.3
I purchase tickets	62.3	69.2	63.1	81.5	54.6
I am browsing the program of various cultural institutions	54.2	46.2	30.8	66.7	69.3
Others	-	-	-	7.4	-

Source: own study.

Consumers were asked to identify the distinguishing features of the e-culture market. The youngest group of respondents (66.7%) pointed to virtuality. Consumers aged 23-27 years and those over 31 years (92.3% and 85%, respectively) agreed that free and easy access to services is the best distinguishing feature of the e-culture market. In contrast, the 27-31 age group (88.9%) identified 24/7 availability as the key feature. All of these identified characteristics are a result of technological and informational progress and the continually increasing popularity of digital forms of service expression (Table 4).

Table 4.
Consumer opinions on the characteristics of the e-culture market by age (in %)

Item	Total	Respondents by age			
		up to 23	23-27	27-31	above 31
24/7 availability	72.3	59.0	69.2	88.9	68.8
Virtuality	65.3	66.7	77.8	59.3	61.3
Free and easy access to services	79.6	64.6	92.3	74.1	85.0
The ability to actively participate in cultural life without leaving home	54.1	61.5	48.9	70.4	55.5
Low costs of using e-culture services	41.2	31.8	46.2	33.3	29.3
High costs of using e-culture services	18.5	12.5	29.6	7.4	5.7

Source: own study.

The group of surveyed consumers demonstrates relatively frequent activity in using e-culture services. 36.9% of them use e-culture at least once a week, one percentage point less use it daily, 14.6% use it several times a month, 10.7% use it rarely, and 1.9% of the group have never used e-culture (Figure 1).

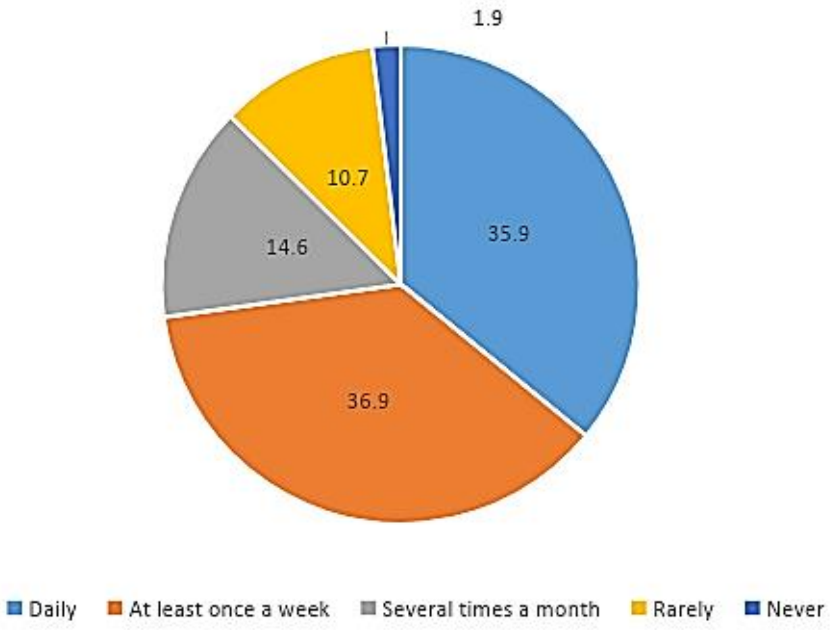

Figure 1. Frequency of using e-culture services (in %).

Source: own study.

The vast majority of respondents (96.1%) stated that e-culture is a useful phenomenon in contemporary times. Conversely, 3.9% of the respondents disagreed with this opinion (Figure 2).

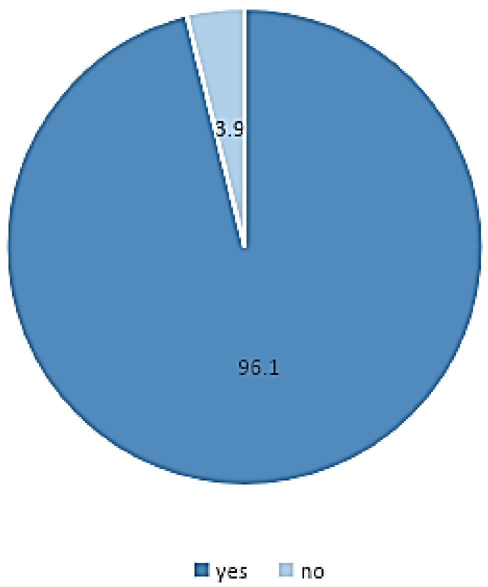

Figure 2. Opinion on the usefulness of the e-culture phenomenon (in %).
Source: own study.

In the conducted research, consumer opinions were sought regarding the functioning of e-culture in Poland, its impact on traditional culture, and the emerging opportunities and threats for development. Many responses did not clearly define consumer opinions, as there were quite wide discrepancies in the answers provided. In the first analyzed question, positive responses were more frequent (definitely yes - 25.3%, probably yes - 33%, maybe - 24.2%), suggesting that consumers prefer the digital form of cultural expression over the traditional one. In the second question, concerning the displacement of traditional cultural heritage by digital forms of culture, opinions varied. However, there is a noticeable tendency towards confirming this thesis (22.3% of respondents strongly agreed, and 31.1% somewhat agreed). In the following question, respondents were asked if virtuality is an opportunity for the development of culture. Respondents clearly expressed affirmative opinions on this topic (32% strongly agreed, and 43.7% somewhat agreed). Consumers undoubtedly perceive the positive impact of the Internet and digitization in terms of expressing and delivering e-culture services and digitizing cultural heritage resources. In the last question, it was suggested that virtuality poses a threat to the development of culture. The majority of respondents disagreed with this thesis, as almost half chose the response 'probably not,' and one in five chose 'definitely not' (Table 5).

Table 5.
Summary of opinions on the usefulness of e-culture (in %)

Item	Definitely yes	Probably yes	Maybe	Probably no	Definitely no
The digital form of accessing culture is more accessible than the traditional one	25.3	33.0	24.2	15.5	1.9
The digital form of expressing and accessing culture is displacing traditional cultural heritage	22.3	31.1	12.6	28.2	5.8
Virtuality is an opportunity for the development of culture	32.0	43.7	19.4	3.9	1.0
Virtuality is a threat to the development of culture	3.8	14.5	15.5	45.7	20.5

Source: own study.

Respondents were asked to express their opinions on factors conditioning the development of the e-culture market. Among those with basic or vocational secondary education, nearly 80% of responses indicated that high costs of traditional services are a major factor. In both the groups with secondary and higher education, technological and informational progress was highlighted. The development of mass media was also a significant factor for consumers, with more than half of the respondents in each group identifying it as important.

Table 6.
Consumer opinions on the impact of various factors on the development of the e-culture market (in %)

Specification	Total	Respondents by education level		
		Primary	Secondary	Higher
Technological progress	66.8	52.8	67.6	78.2
Development of mass media	59.6	61.2	62.2	54.4
Lack of interest in the offerings of museums/cinemas etc.	9.8	14.5	2.5	16.9
High costs of traditional services	59.2	79.6	43.3	35.6
Possibility of digitizing cultural resources	44.9	24.3	37.8	52.5
Lack of time for consumers to engage with traditional cultural forms	29.3	19.6	12.7	42.4

Source: own study.

5. Discussion

The conducted research aimed to understand the level of consumer demand for services offered in the e-culture market, their attitudes towards cultural engagement, opinions on the impact of factors on market development, the usefulness of e-culture in the modern world, and other related aspects. The results obtained provide insight into the functioning of entities in the e-culture market.

Consumers engage with culture in various ways and with varying frequencies. The research shows that consumers most frequently choose cinema for cultural experiences (25.2%). Theater is the second most frequently visited institution (9.7%). Opera is the least popular, with nearly 75% of consumers never having used its services. These findings closely match the percentage interest in cultural institutions revealed in the KIM - National Institute of Media (2023) studies, which show 27.9% for cinema, 4.8% for theater, and 1.9% for opera. KIM researchers also noted relatively high consumer interest in attending concerts. However, these data cannot be directly compared to the findings of the current research due to the unspecified types of musical events.

The research provided valuable information about consumer attitudes toward the usefulness of e-culture in the modern world. The results indicate that digital forms of cultural engagement are more accessible to consumers than traditional forms. Positive factors contributing to this choice include 24/7 availability, convenience (the ability to access e-culture from anywhere and at any time), and relatively low costs. Other researchers have also noted the emergence of content personalization features (Gomez-Uribe, 2015), diversity of offerings, and creative ways of content promotion (Matwiejczyk, 2020).

The thesis posed in the research, suggesting that digital forms of cultural expression and engagement are displacing traditional cultural heritage, revealed a complex and varied nature of consumer opinions. Over half of the respondents supported this thesis, one-third disagreed, and one in ten remained neutral. This variability in consumer responses may be attributed to differing levels of acceptance of modern technologies. Some consumers are open to new technologies and readily adapt to digital forms of culture, while others prefer traditional forms. A. Kortosz-Mirecka and M. Mucha (2019) observe that contemporary society exhibits constantly changing cultural and entertainment needs, which translates into a growing tendency to abandon traditional forms of presented cultural resources, such as literature collections in libraries or artworks in galleries or museums. The attendance of cultural participants at various cultural events, such as art exhibitions, theater performances, or movie screenings, is also showing a declining trend (Kortosz-Mirecka, Mucha, 2019).

For some consumers, traditional forms of culture are synonymous with comfort and habit. They may feel a stronger emotional connection, for instance, with physical cultural goods like books, CDs, vinyl records, etc., which makes them reluctant to transition to digital alternatives (Janoś-Kresło, 2008). Other studies suggest that consumers will increasingly return to traditional forms of cultural engagement (Castells, 2003). In contrast, B. Namyślak's research (2013) demonstrated that the digital culture market is on an upward trend in the Polish market. This is evidenced by the connection between economic development and cultural development, which consequently supports investments in e-culture and the media sector.

According to consumers' opinions on using e-culture, it can be inferred that a significant portion of them seeks convenient ways to engage with culture. Over 50% of respondents indicated that the digital form of service delivery is more accessible than the traditional one.

An increasing number of consumers prioritize a high quality of life, which encourages them to turn to e-culture goods more often than to traditional culture. Research has shown that most consumers lean towards modern forms of cultural provision, such as using streaming services or listening to music online. This situation compels public sectors to enhance their creativity and seek new ways to serve consumers on multiple levels, including in digital markets (Wolniak, Jonek-Kowalska, 2020, 2022.

Consumers in the e-culture market are characterized by an awareness of sustainable consumption, which plays a significant role in the contemporary world. The research revealed that younger groups of respondents demonstrate a greater awareness of sustainable use of goods in the e-culture market, which has been also confirmed in the studies by B. Gajdzik, J. Kol, and A. Stolecka-Makowska (2023). It is important to note that consumers, with the progress of the modern world, are constantly evolving and changing their behaviors. As a result, one should expect non-uniform changes in their approach to sustainable development, which may consequently influence their behaviors in the context of engaging with digital markets (de Oliveira, Gomes, de Abreu, Oliveira, da Silva Cesar, 2022; Gajdzik, Jaciow, Wolny, 2023; Gajdzik et al., 2024).

In consumers' opinions, virtuality is an important aspect of the e-culture market. Moreover, over 75% of respondents indicated that virtuality represents an opportunity for the development of the e-culture market. This is likely related to increased consumer awareness and need for using all digital services driven by technological advancement. This result is supported by studies by A. Uzelac (2005) and F. Huysmans and J. de Haan (2003), which show that well-developed network infrastructure positively affects the distribution of digital cultural goods, attracts consumers with its appeal, and stimulates interest in e-culture market services.

6. Summary and conclusions of the research

The conducted research aimed to understand the level of consumer demand for services offered in the e-culture market, their attitudes towards cultural engagement, opinions on the impact of factors on market development, the usefulness of e-culture in the modern world, and other related aspects. The results obtained provide insight into the functioning of entities in the e-culture market.

Recent years have seen developmental changes in digital markets. With technological and informational progress, increasing consumer awareness, and a wide and attractive supply from providers, e-culture has become firmly embedded in consumers' daily lives. Traditional ways of engaging with culture are increasingly being abandoned.

The research conducted for this work aimed to determine the functioning of e-culture market entities based on consumer behavior, their awareness, frequency and manner of use, and the level of demand for services offered by the e-culture market. The findings indicate that consumers are eager to utilize the offerings of the market. Interest in e-culture has become increasingly widespread. Based on the conducted research and secondary information, the following factors influencing consumer engagement with e-culture have been identified:

- The ability to quickly modify the service offerings and easily adapt to consumer needs.
- The virtual nature of the phenomenon, associated with the ease of reaching a large audience.
- The attractive pricing of cultural services (as opposed to traditional service offerings).
- A rich and enticing array of services offered.
- The option to make payments in various forms.
- Anonymity of users online, which facilitates the decision-making process regarding potential purchases.
- 24/7 availability of services (e-culture can be accessed from any location at any time).
- The international dimension of the services offered.

The e-culture market continues to develop. There is an increasing demand for digital cultural services, which consequently leads to a rise in the number of entities providing e-culture (Nielsen Report, 2022). In response to growing demand, the offerings of businesses and cultural institutions are becoming broader and richer (Deloitte Report, 2020). Supply entities compete in ways of delivering culture, incorporating increasingly innovative solutions, such as the use of intelligent recommendation systems based on artificial intelligence or virtual reality as a form of presenting cultural content.

Regarding demand entities (consumers) in the e-culture market, there is a decreasing interest in traditional forms of e-culture provision. These changes are not abrupt but could gradually lead to a significant displacement of traditional cultural engagement methods. It is worth noting the phenomenon of streaming media, which has shown steadily increasing popularity since its market inception. This is likely due to the vast resources that this form of service offers consumers—streaming media libraries contain extensive cultural content that consumers can access multiple times at their chosen location and time. The freedom of access and relatively low costs of online services encourage consumers to frequently utilize this form of accessible culture.

The article's objective has been achieved. The research demonstrated the development and functioning of e-culture market entities and highlighted their future directions. Given the developmental trends in the e-culture market, it is reasonable to assert that cultural institutions and businesses will continue to follow changing consumer needs and emerging technological innovations, consistently expanding their offerings, exploring new forms of online cultural provision, and proposing more engaging and personalized content.

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