

Between Lockdowns: Attendance by Audience Spectrum Types & Attendance by Distance

Context

Between the end of the first lockdown and the start of the second (Summer/Autumn 2020), many cultural organisations opened for in-person visits or performances.

This report summarises profiling and distance travelled for some of those audiences, to give an insight into different types' attendance, travel patterns and potential future behaviour.

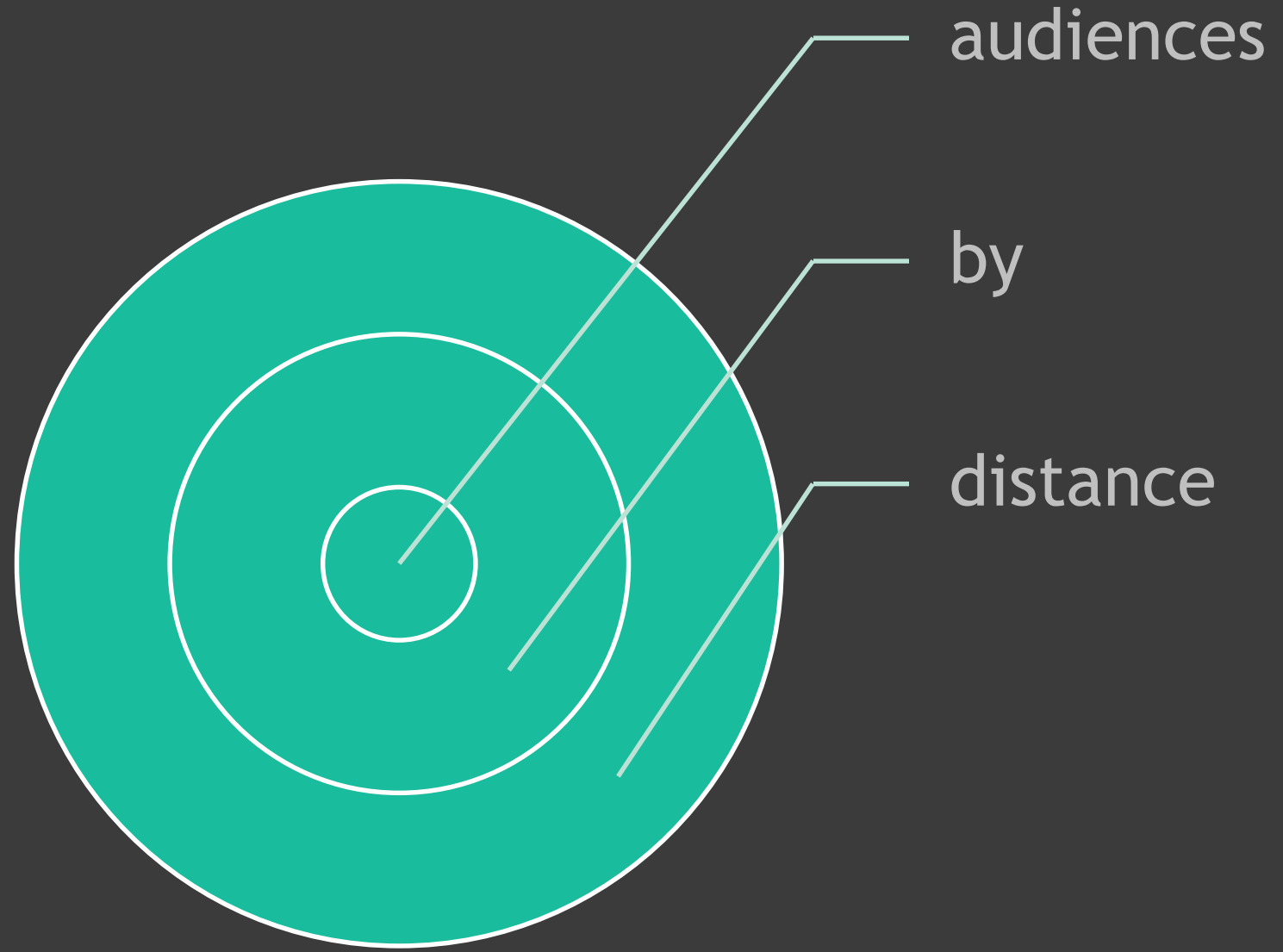
Question 1:

How have different Audience Spectrum types responded in the period between lockdowns?



Question 2:

How have distances travelled changed in the period between lockdowns?



What We Did

Looked at [1] the profile and [2] proportions by distance bands of audiences for a selection of venues (both performing arts and museums & galleries) for equivalent time periods in 2019 and 2020, to see how these have changed.

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Specifically:

Based on 106k attenders from 17 Aug - 11 Oct and 1 Aug - 20 Sept from a selection of 8 Performing Arts venues 9 Museums and Galleries from across the country, of a variety of types and scales, for 2019 and 2020, using Audience Finder ticketing data [or survey for 6 Museums and Galleries], weighted by 2019 visitor numbers.

What We Found: Profile



There were **higher** proportions of **Metroculturals**, **Experience Seekers**, **Dormitory Dependables** and **Kaleidoscope Creativity**

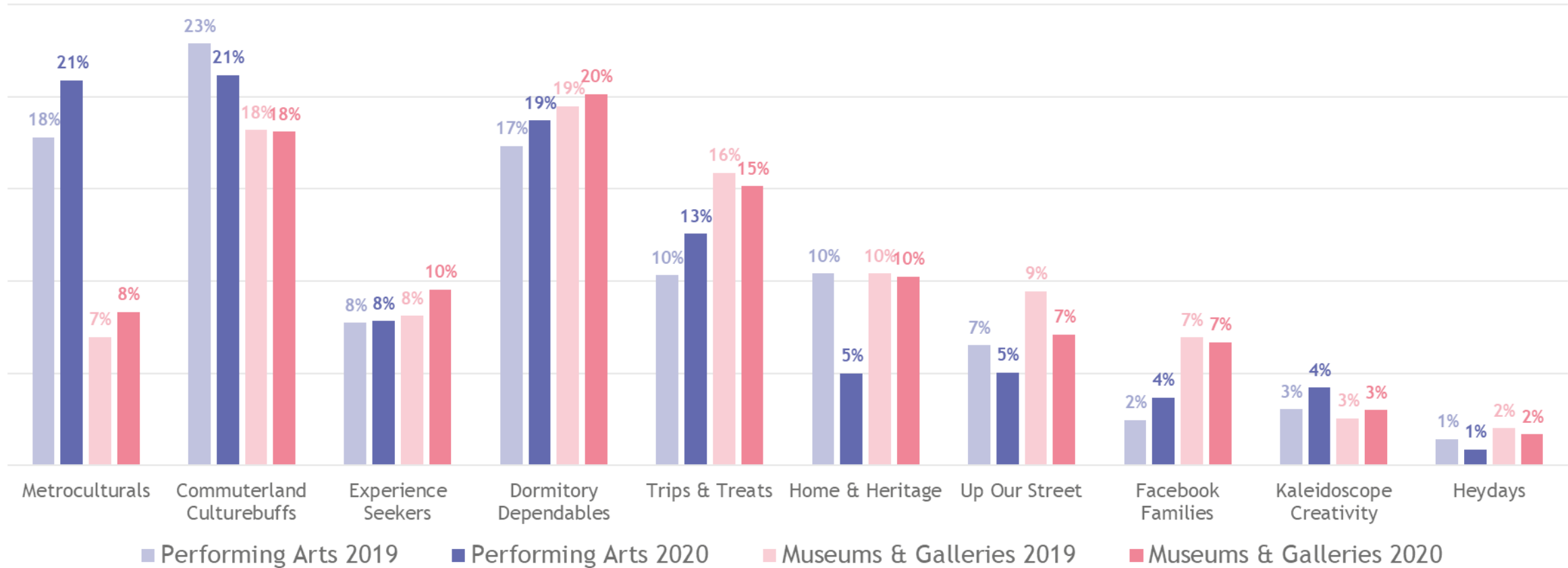


and **lower** proportions of **Commuterland Culture-buffs**, **Home & Heritage** and **Up Our Street**, but with variation between the types of venue.

This may reflect a combination of greater reluctance to attend by older age groups (esp. for indoor events), income pressures for (some) younger groups, and pressures to still do things with children for parents; offset against lesser reluctance among younger age groups, availability of venues closer to home and an openness to changes of format among some urban-based groups.

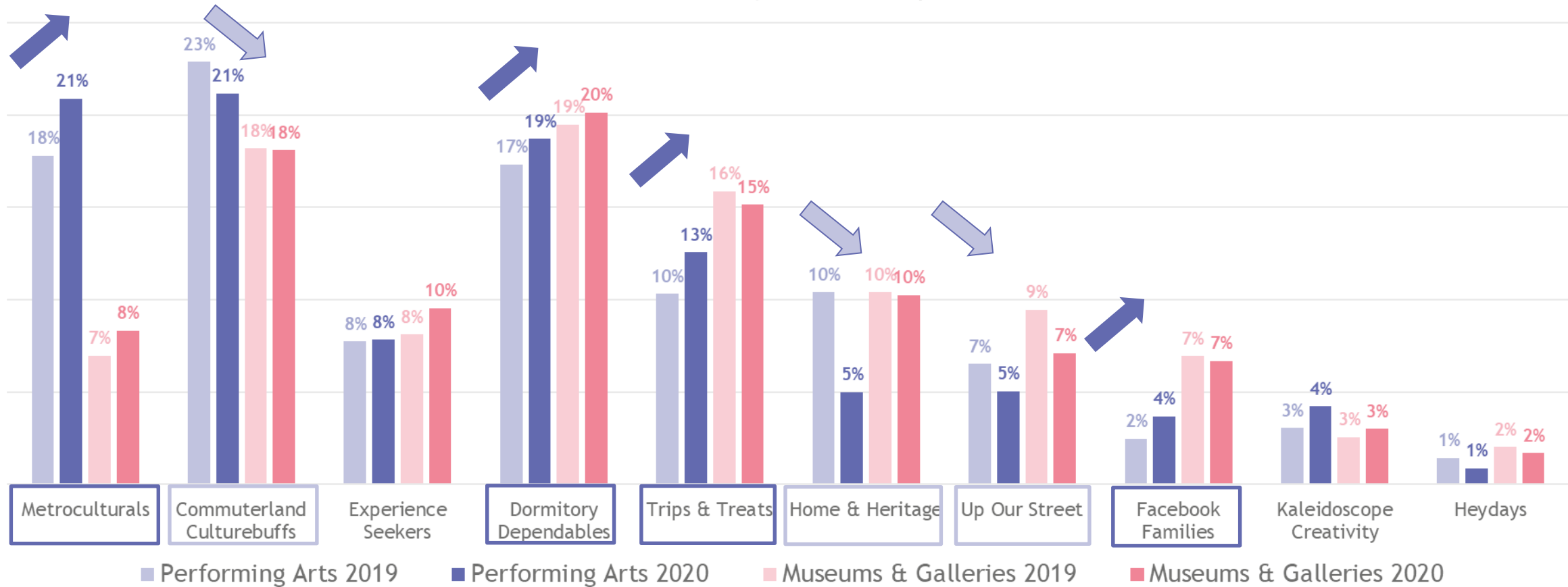
What We Found: Profile

% of Audience by Audience Spectrum



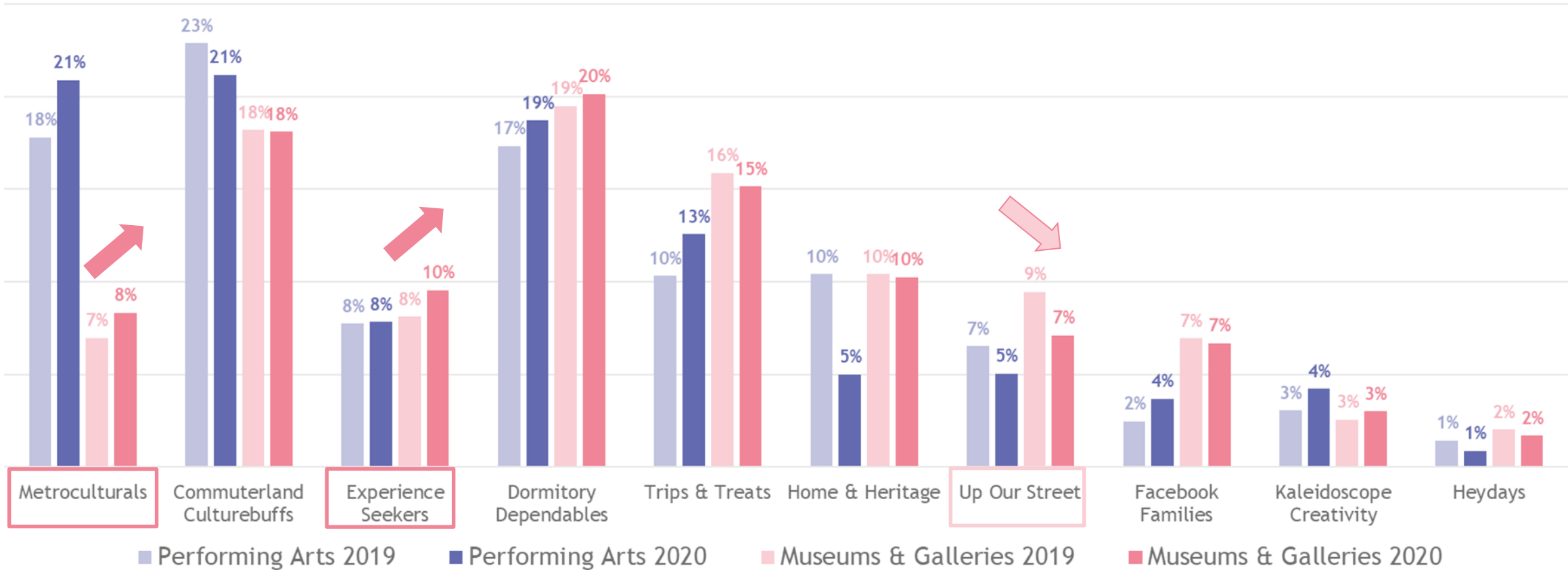
What We Found: Profile — Performing Arts

% of Audience by Audience Spectrum



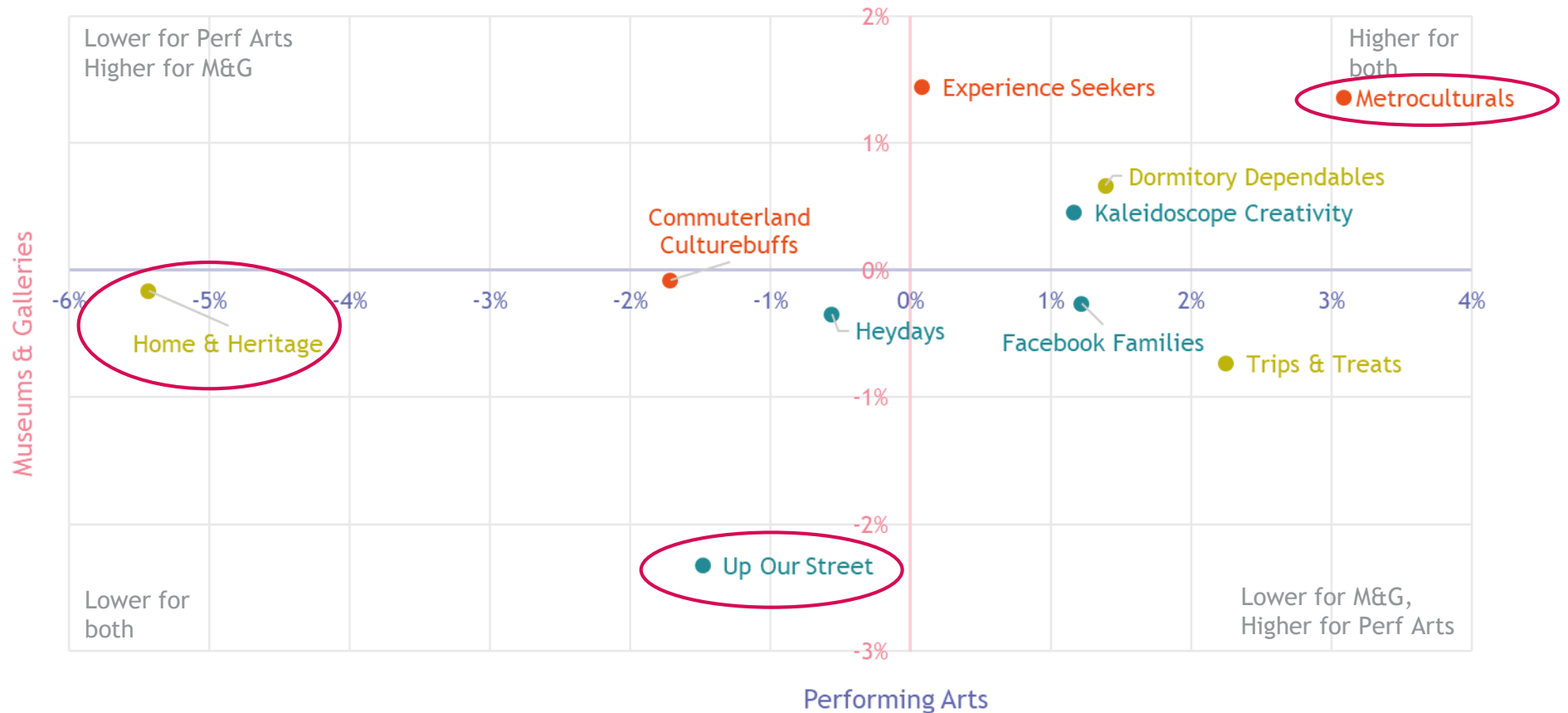
What We Found: Profile — Museums & Galleries

% of Audience by Audience Spectrum



What We Found: Profile — Summary of Changes in % Points

Change in Audience Spectrum % of Audience 2019 to 2020



What We Found: Profile — Decreasing

Commuterland Culturebuffs have reduced notably relative to other higher engaged segments

Home & Heritage have significantly reduced for performing arts and are likely to be more cautious due to age

Up Our Street may have financial pressures and also contain higher proportions of older Black and Asian households

Heydays have low in-person attendance already, but are likely to be strongly averse to attending during COVID

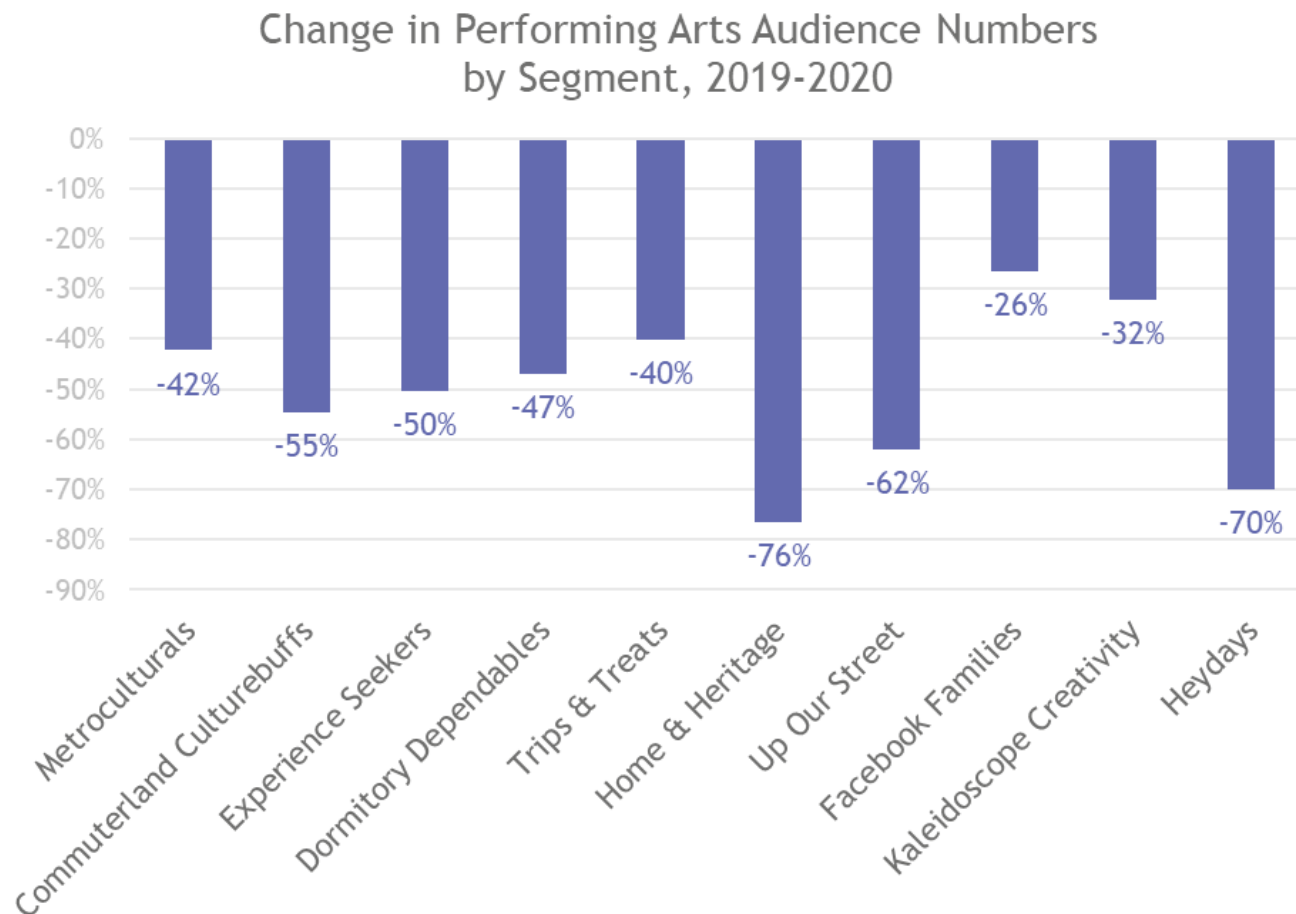
These profiles show proportions, not absolute numbers (although we show this absolute decline for performing arts later). Some segments have reduced by more than average, and are of particular note (especially where, like **Commuterland Culturebuffs**, they are a significant part of many cultural audiences).

What We Found: Profile — Decrease in Audience Numbers

For the **Performing Arts** data, we had total booker numbers for each time period. This chart shows the % decrease in the total number of bookers for each segment*.

It shows biggest decreases in **Home & Heritage**, **Heydays**, and **Up Our Street**.

*since we profiled a selection of venues which had reopened, overall sector reductions are higher than those shown.



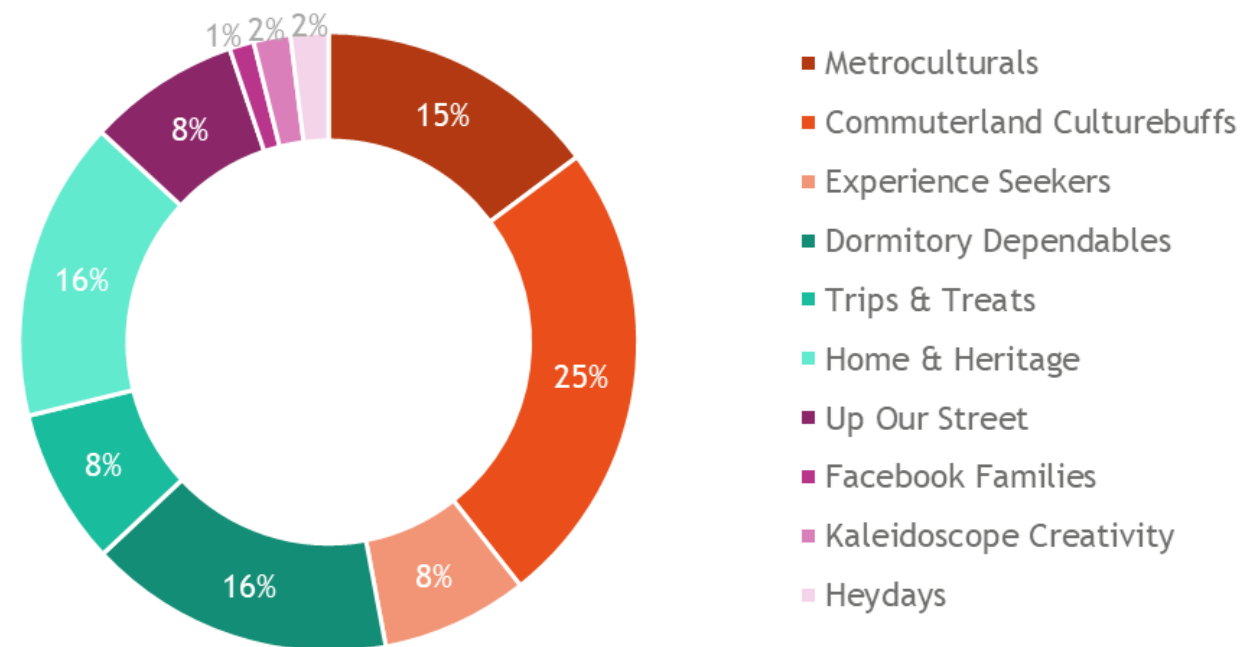
What We Found: Profile — Decrease in Audience Numbers

An alternative view is to look at the profile of those performing arts venue audiences who *didn't* attend in 2020, compared to 2019*.

This shows the importance of the drop in **Commuterland Culturebuffs**: 25% of the total.

*e.g. the total number of bookers dropped by 23.2k, the number of Metroculturals dropped by 3.4k, which is 15% of 23.2k.

% of Non-Returning Performing Arts Audiences by Segment



What We Found: Distance

We looked at the change in distance by plotting the distance between organisations and attenders*, grouped into standard bands. This was done three ways (to ensure the specific *method* of defining distance wasn't the cause of any observed difference):

- i. Straight line distance (i.e. 'distance as the crow flies')
- ii. Drive distance (i.e. the length of roads on the shortest route from A to B)
- iii. Drive time (the time to drive that shortest route, in average traffic)

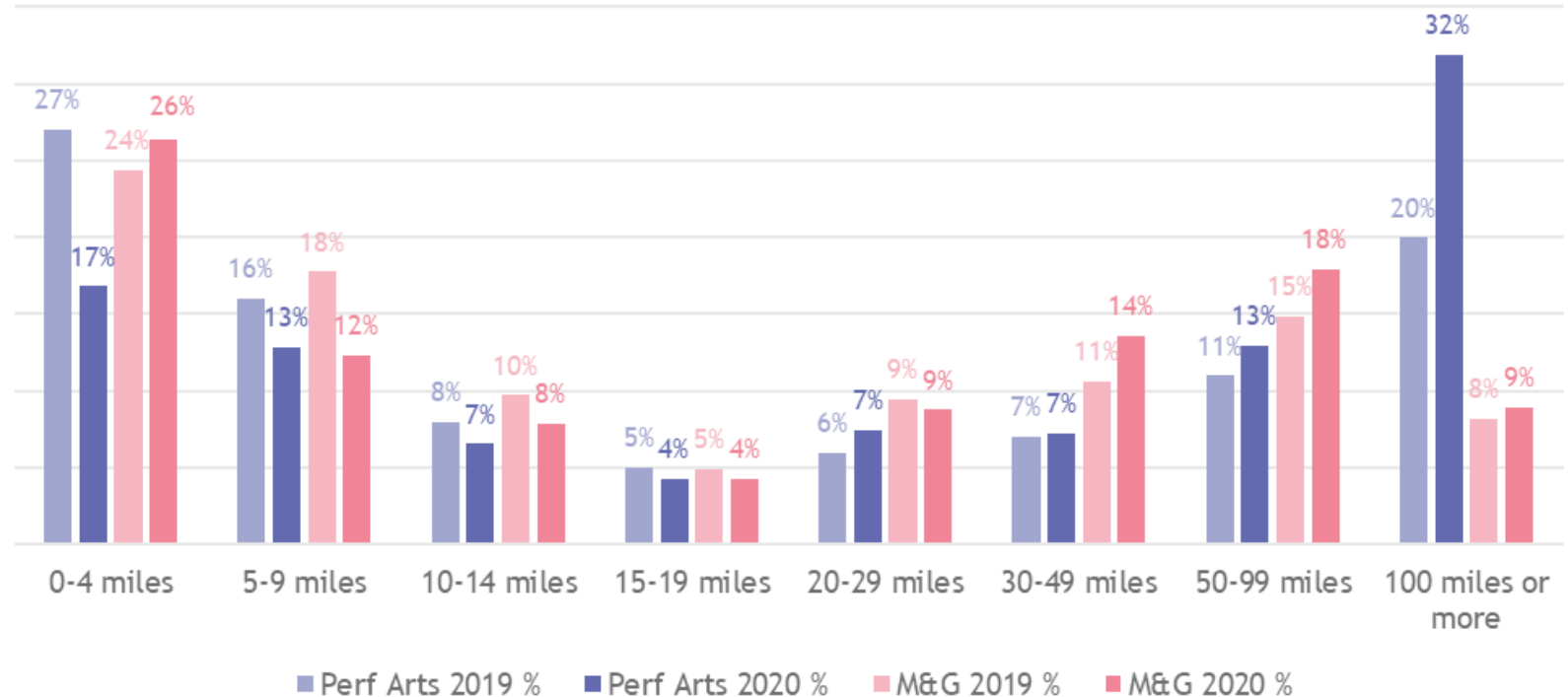
All gave the same overall result.

*Specifically, the 'centroid' of their postcode: each postcode covers several households, but is allocated to a single 'point' for analysis. In practice, this makes minimal difference since it rarely affects the distance band allocated.

What We Found: Distance — Straight Line

Performing arts and Museums and Galleries had a similar overall pattern of attendance by distance, however performing arts had higher proportions from 100+ miles away and lower proportions for each band from 20-99 miles away.

% By Straight Line Distance
2019 vs 2020

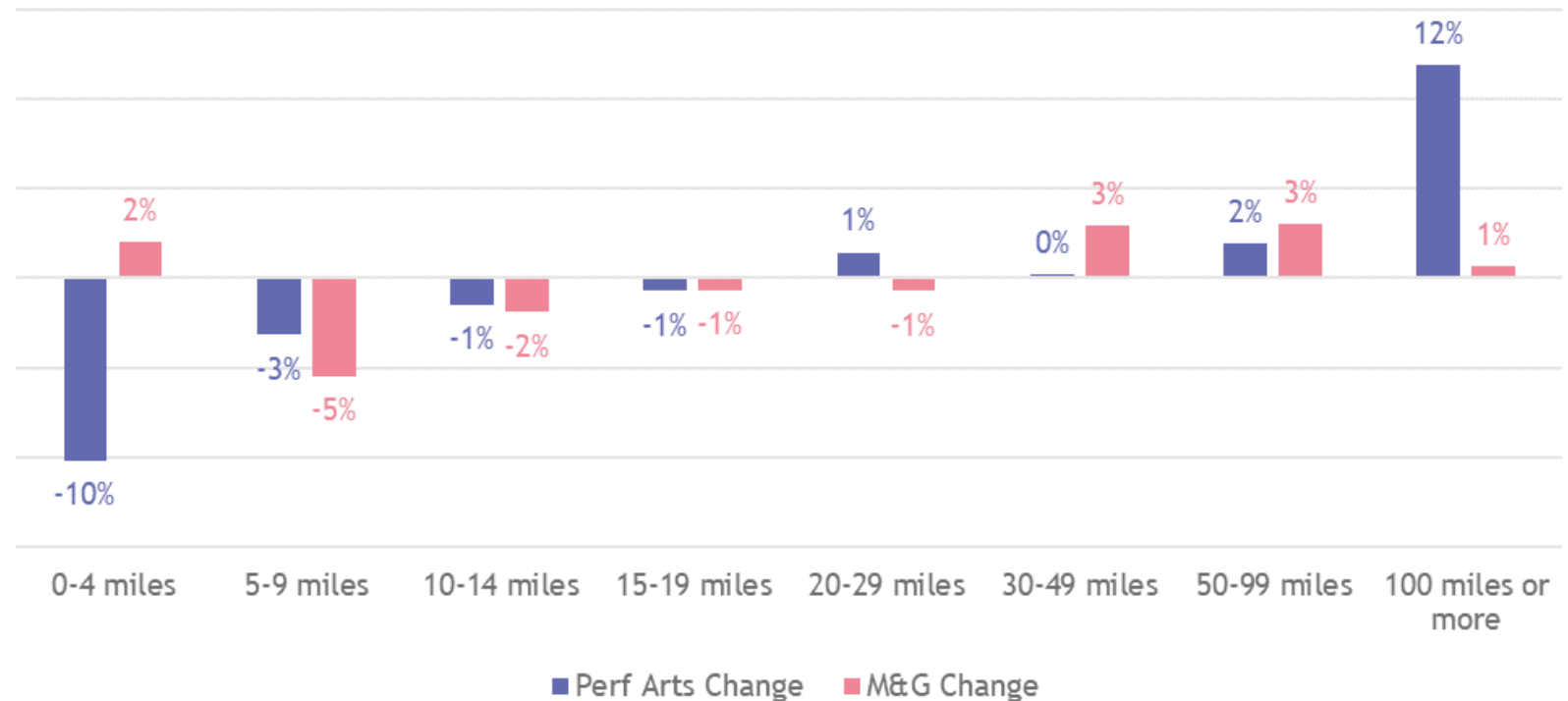


What We Found: Distance — Straight Line

Between lockdowns, performing arts proportions reduced for all distances below 20 miles (esp. the most local) and increasing for further away, with 100+ miles rising to 32%.

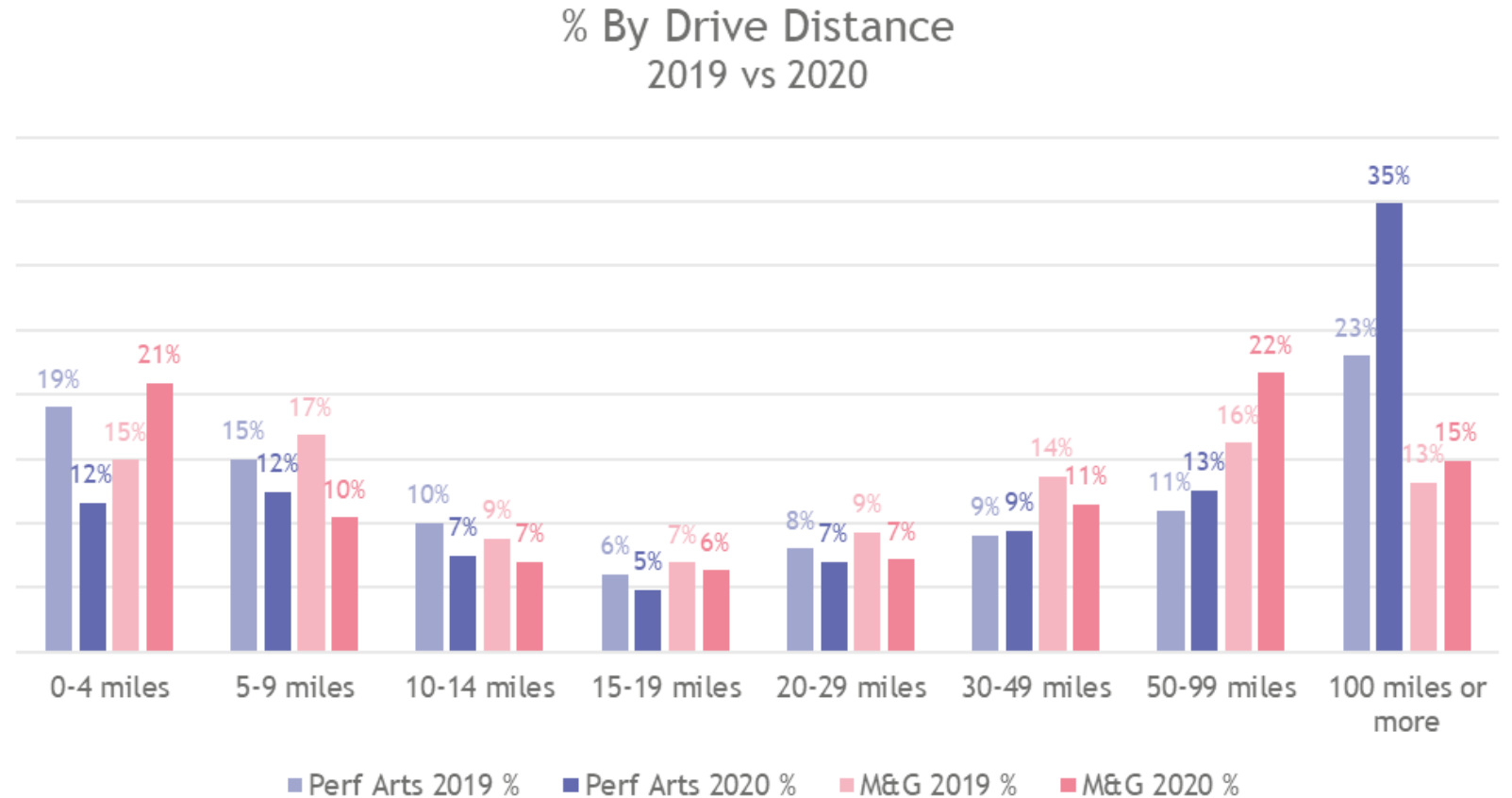
Museum and Gallery audiences increased within 0-4 and beyond 30 miles away, but by lesser amounts.

Percentage Point Change By Straight Line Distance
2019 vs 2020



What We Found: Distance — Drive Distance

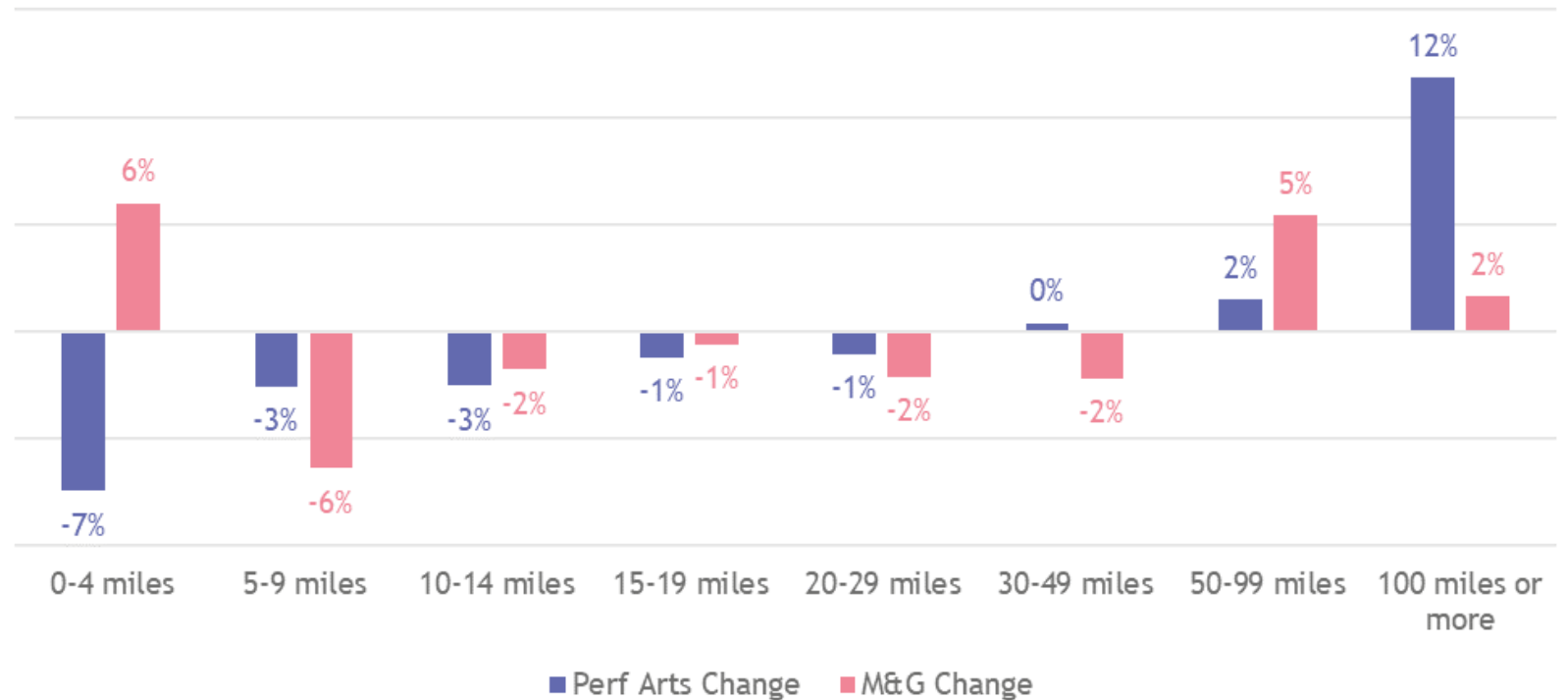
The overall picture is the same for drive distance (although the audience appears further away, since the average distance by road is always longer than the straight line distance).



What We Found: Distance — Drive Distance

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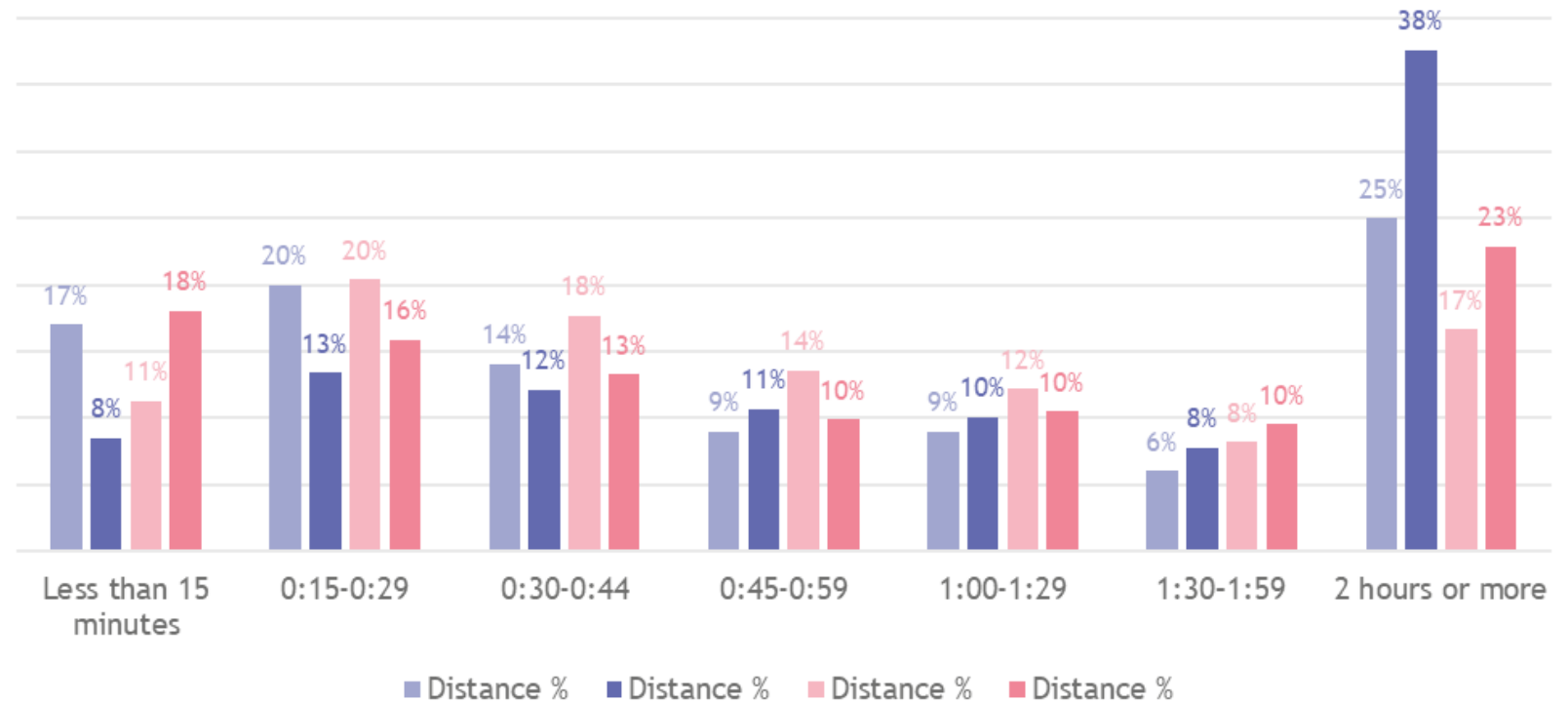
Percentage Point Change By Drive Distance
2019 vs 2020



What We Found: Distance — Drive Time

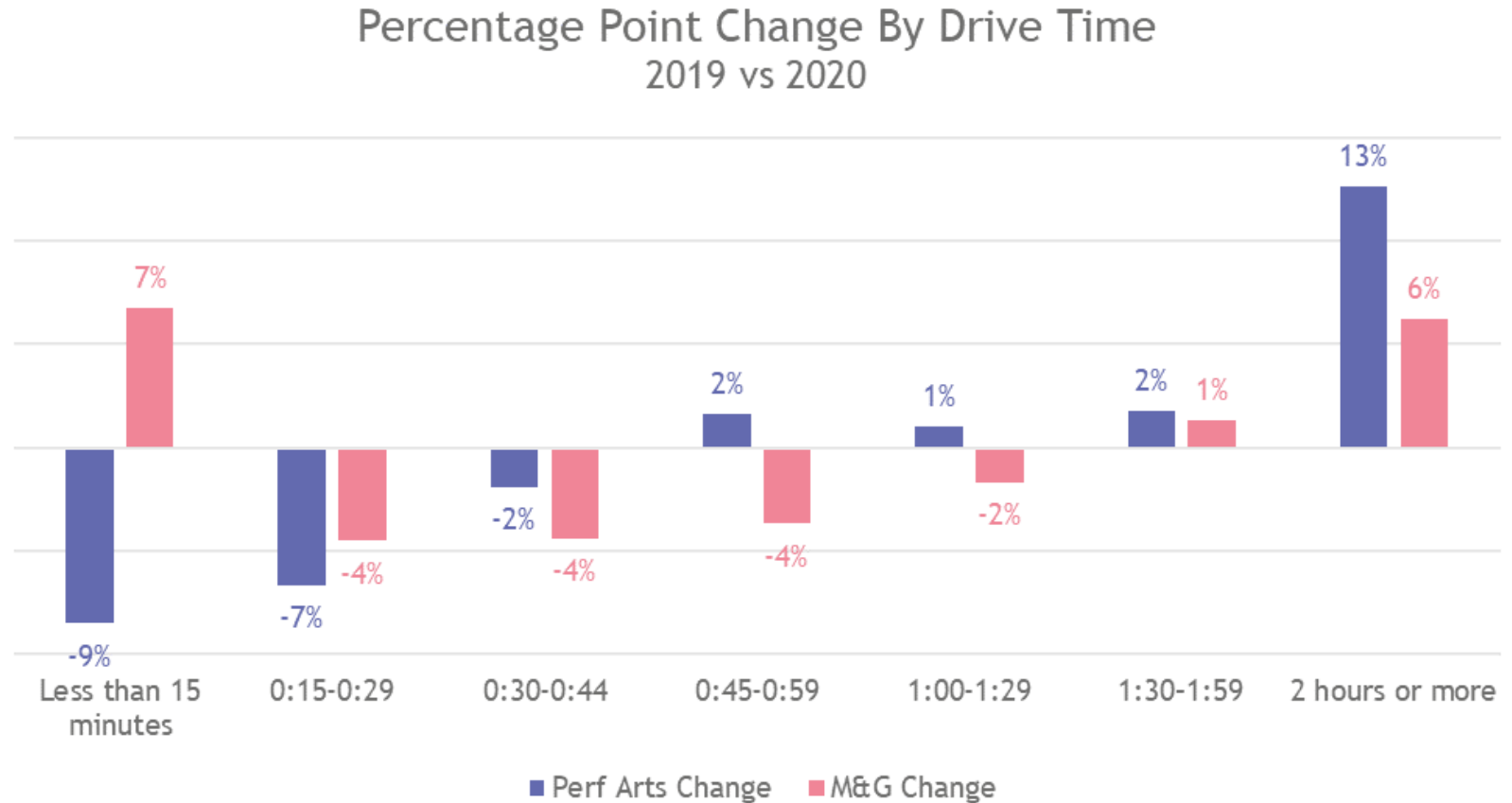
The overall picture is the same for drive time as well (although expressing the distance as time is a useful alternative way of understanding distance in terms of audience *experience*). It also ‘flattens’ the distance, since those travelling from further away do at least usually have the benefit of faster roads.

% By Drive Time
2019 vs 2020



What We Found: Distance — Drive Time

This shows decreases for performing arts within 45 minutes, but most increase over 2 hours. For museums and galleries, there is an increase within 15 mins, then decreases up to 1.5 hours away.



In Summary

This profiling provides evidence that:

- **Home & Heritage** are particularly (and consistently) less likely to attend, especially for performing arts.
- Other segments decreasing to a lesser extent are **Commuterland Culturebuffs** (usually a major part of cultural audiences, so of potentially high impact) and lower-engaged groups **Up Our Street** and **Heydays**.
- Other more highly engaged groups (**Metroculturals**, **Experience Seekers**, **Dormitory Dependables**) are increasing their proportion a little within audiences.
- Age, health and baseline levels of engagement appear to be key factors.

There is more evidence about all of these in our COVID-19 Cultural Participation Monitor.

In Summary

The distance analysis shows that:

- Performing Arts audiences came from further away than previously
- Museum and Gallery audiences came from further away than previously, or very locally (but a lower proportion in between).

These could be for a range of reasons, e.g.:

- For ‘walk up’ activities, people were staying/exploring very locally, and/or...
- ...(as with ticketed events) were more likely to travel for ‘special’ events/trips (things that it was worth travelling further for) but fewer ‘casual’ local trips and/or...
- ...were attending a higher proportion of events/places on a domestic holiday and/or...
- ...more local museum/gallery options were available.

Implications

- Without active intervention, audiences are likely to **shift away from traditional tastes** a little, towards more varied and contemporary tastes, as the balance of segments adjusts in response to COVID
- **Differences of cost and space/ease of circulation** (e.g. between performing arts and museums & galleries, but also in terms of formats) are likely to affect which segments engage, potentially accentuating differences between sectors/formats.
- Some lower engaged groups will become **harder than ever to reach** for existing programmes (e.g. **Up Our Street** and **Heydays**) and additional audience development efforts and/or programming changes may be necessary to reach them in future.
- There is a possibility of arts audiences becoming further **concentrated among highly-educated, metropolitan populations**, without further efforts to diversify reach.

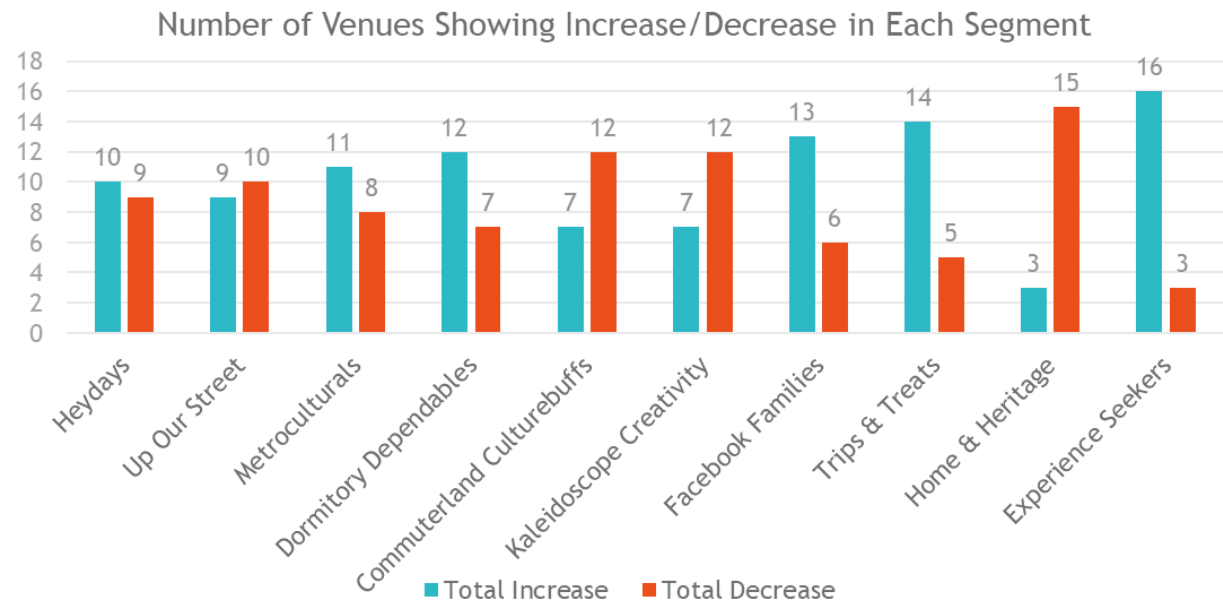
Implications

- Lockdown is likely to affect where feels ‘local’ and to change overall distribution of travel, even in non-lockdown periods
- Holidays/ (lack of) foreign travel may play a substantial role in attendance patterns (this may also drive up the proportion of groups who might otherwise be travelling abroad, esp. in cultural hotspots/for city breaks)
- A tendency to ‘stay local’ can have a counter-intuitive effect to *increase overall travel distance*, if there are strong enough counteracting forces for the longest journeys (e.g. holidays, particularly strong ‘must see’ attractions/events), by reducing middling distances but not longer ones.

Notes About the Research

The profiling gives an insight into which audiences have been more reluctant to return in this interim period, but **we should be cautious to generalise**, because:

- The sample is only 17 organisations (with limited coverage within London, for example)
- Changes in profile were not always consistent between individual venues (see chart)
- Changes to both profile and distance will be affected by changes to programming between years
- Behaviours may, in any case, change between this period and future engagement.



Thank you

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 the audience agency