

The Audience Agency

Digital Audience Survey

November 2020

About the Digital Audience Survey: Purpose & Methodology

May 2020:
Digital Audience Survey launched by TAA

November 2020:
2nd wave results published
6,852 responses
108 orgs

27th January 2021:
Introduction to...Digital Audience Insights event

April 2021
Final wave of first year results to be published

August 2020:
1st wave results published
3,717 responses
79 orgs

January 2021:
Current sample
9,582 responses
239 orgs

31st March 2021
End of current data collection

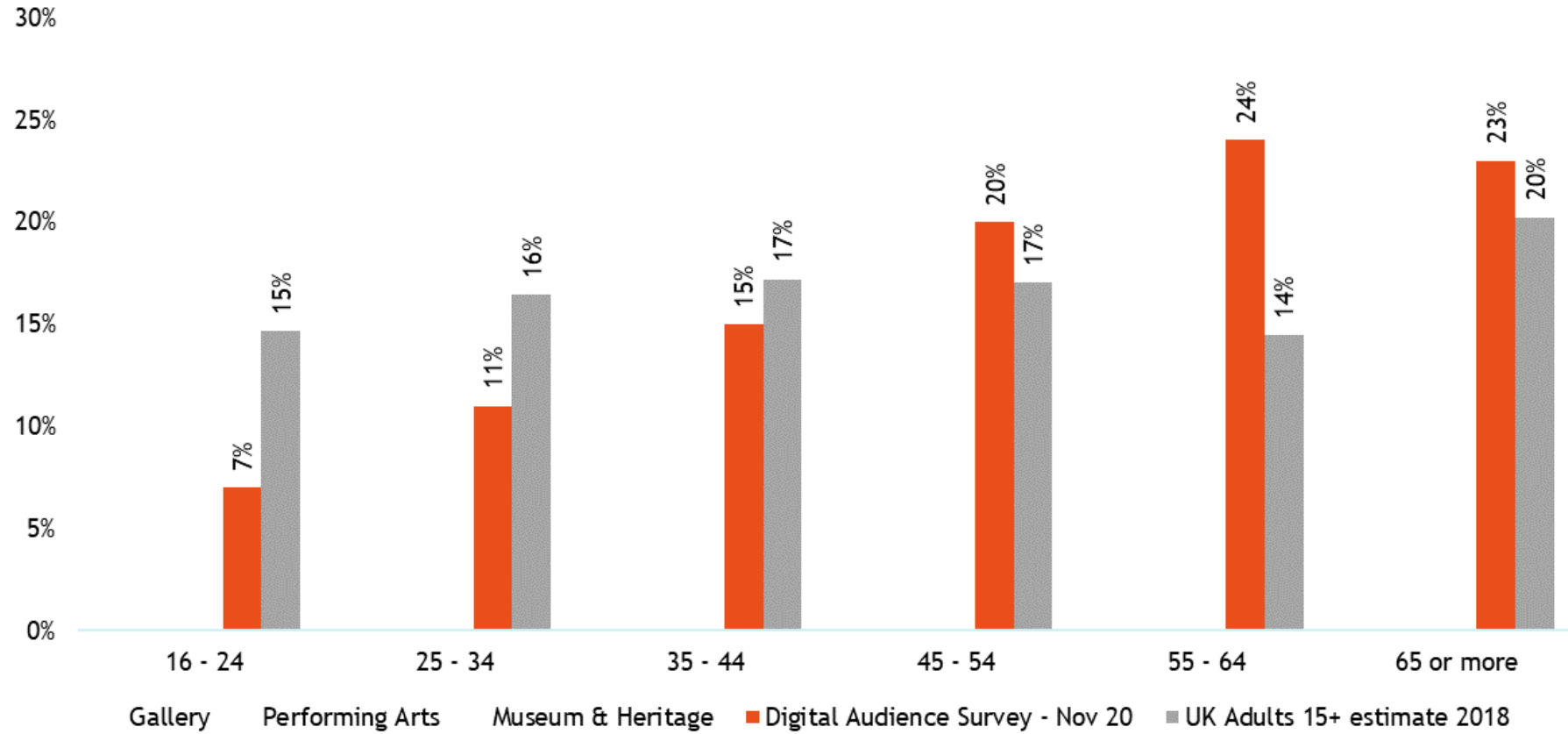
Digital Audience Survey Findings: Who, what, why...

Website visitor demographics

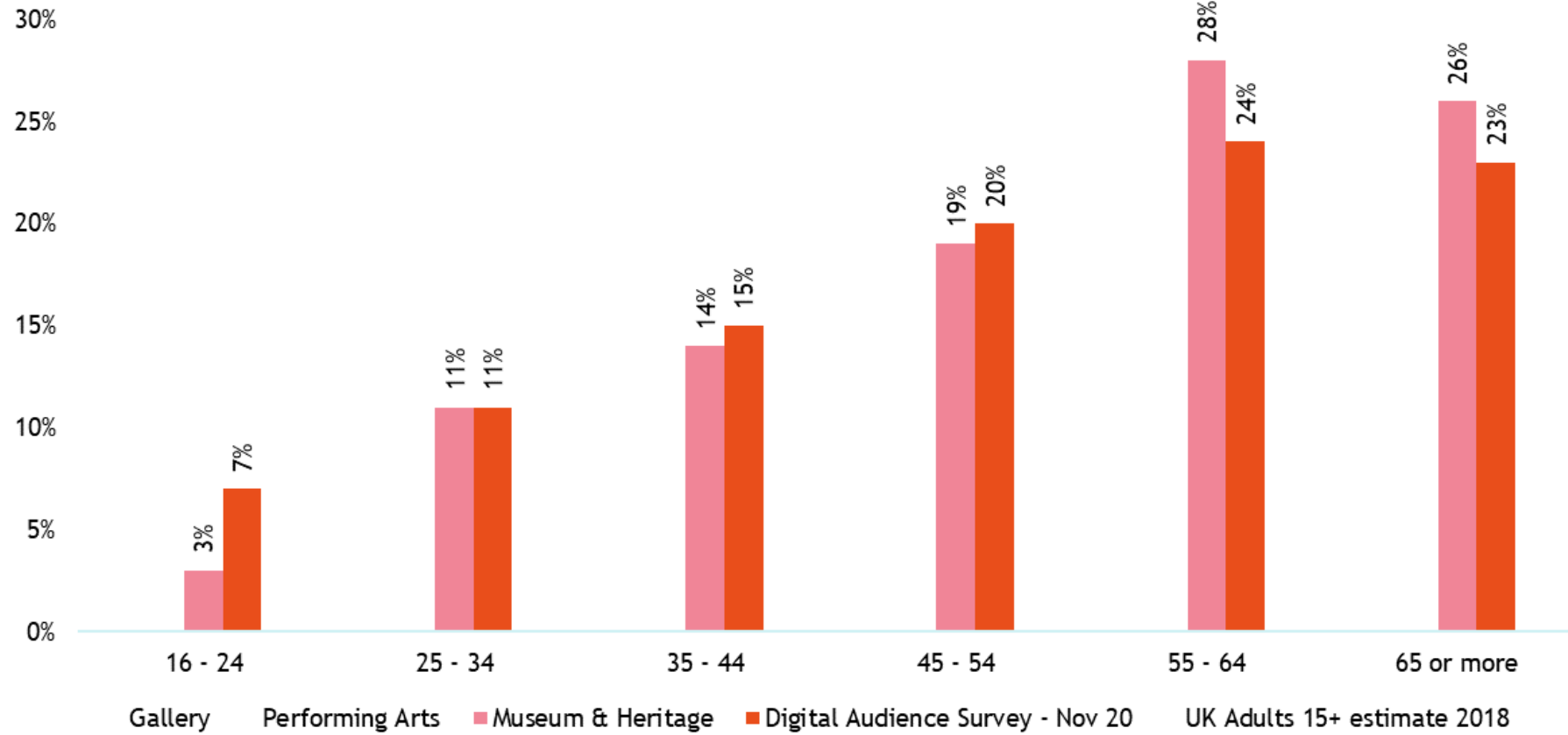
Online audiences are more likely to: (cf. Audience Finder 18/19)

be White	91% vs 89% (UK pop. 87%)
be Older	47% over 55 vs 44% (UK pop. 35%)
be Female	71% vs 64%
have a Disability	12% vs 9%
live outside the UK	15% vs 5%

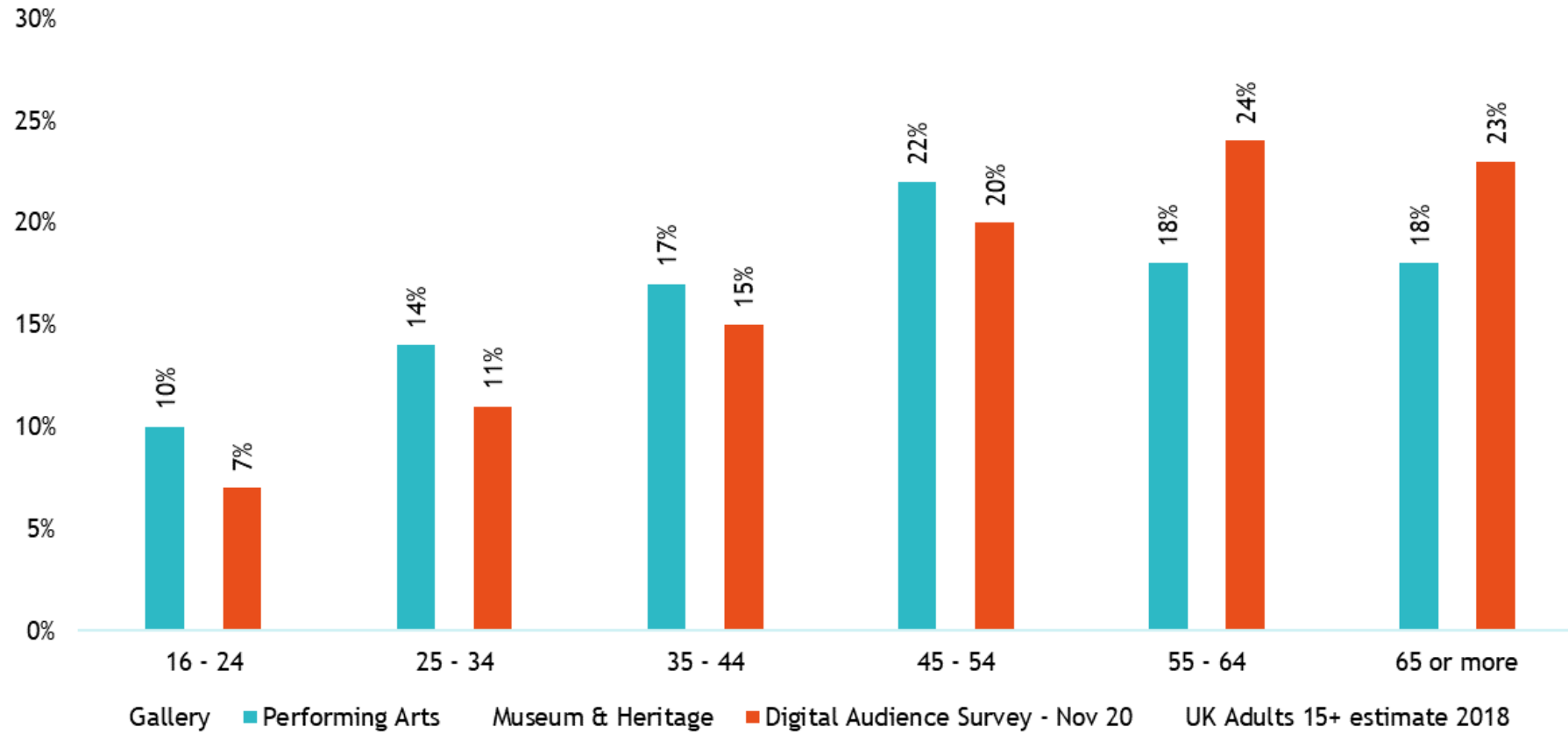
Age



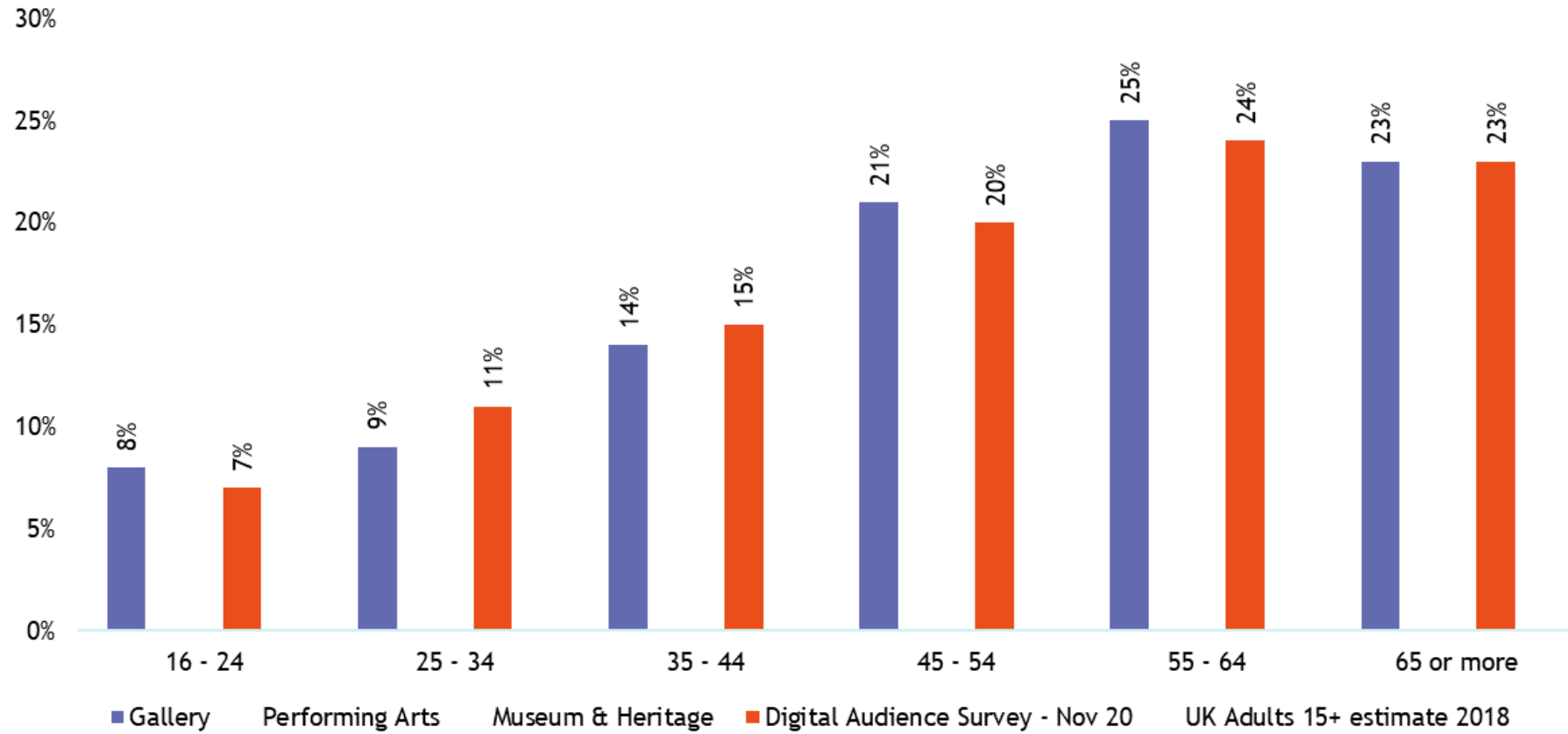
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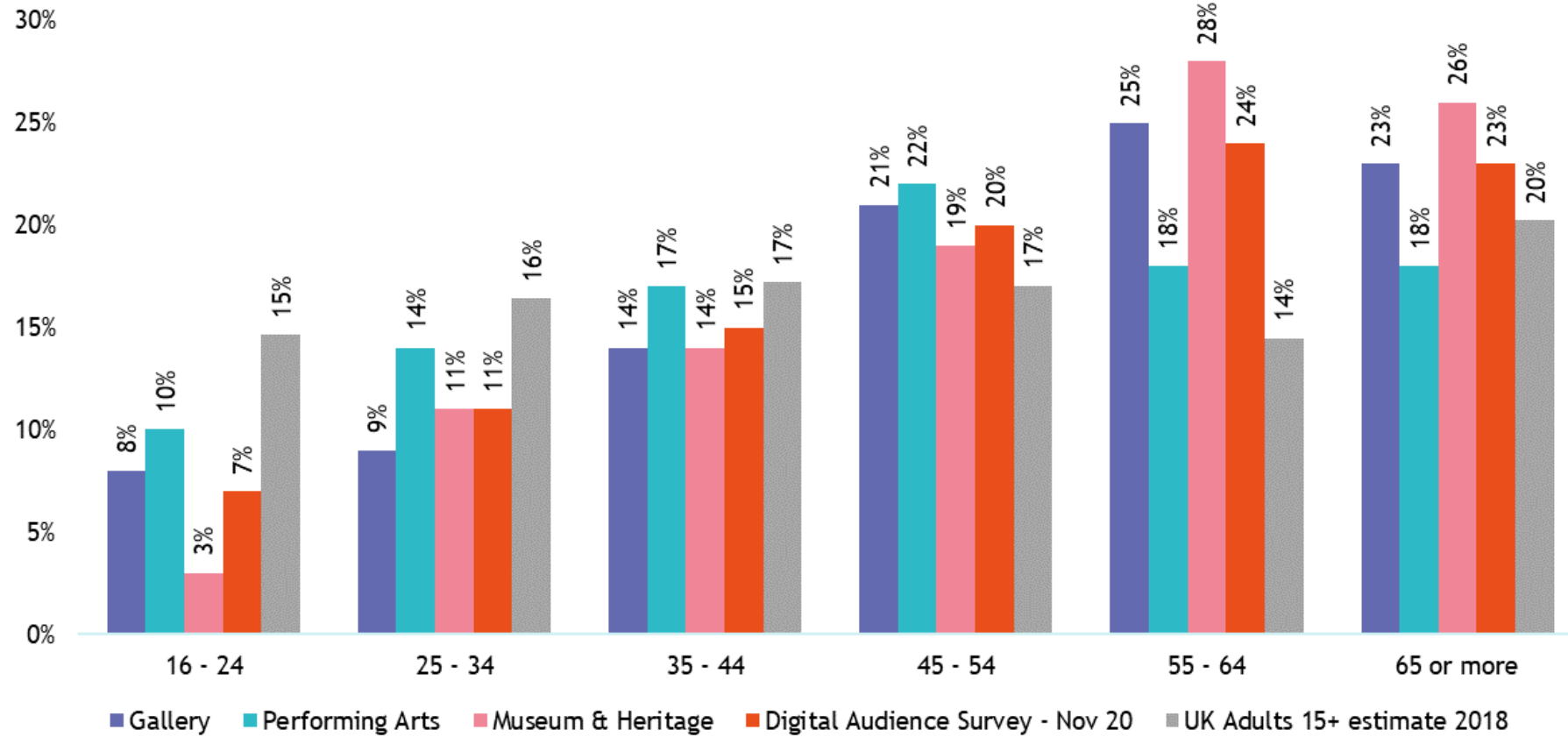
Age



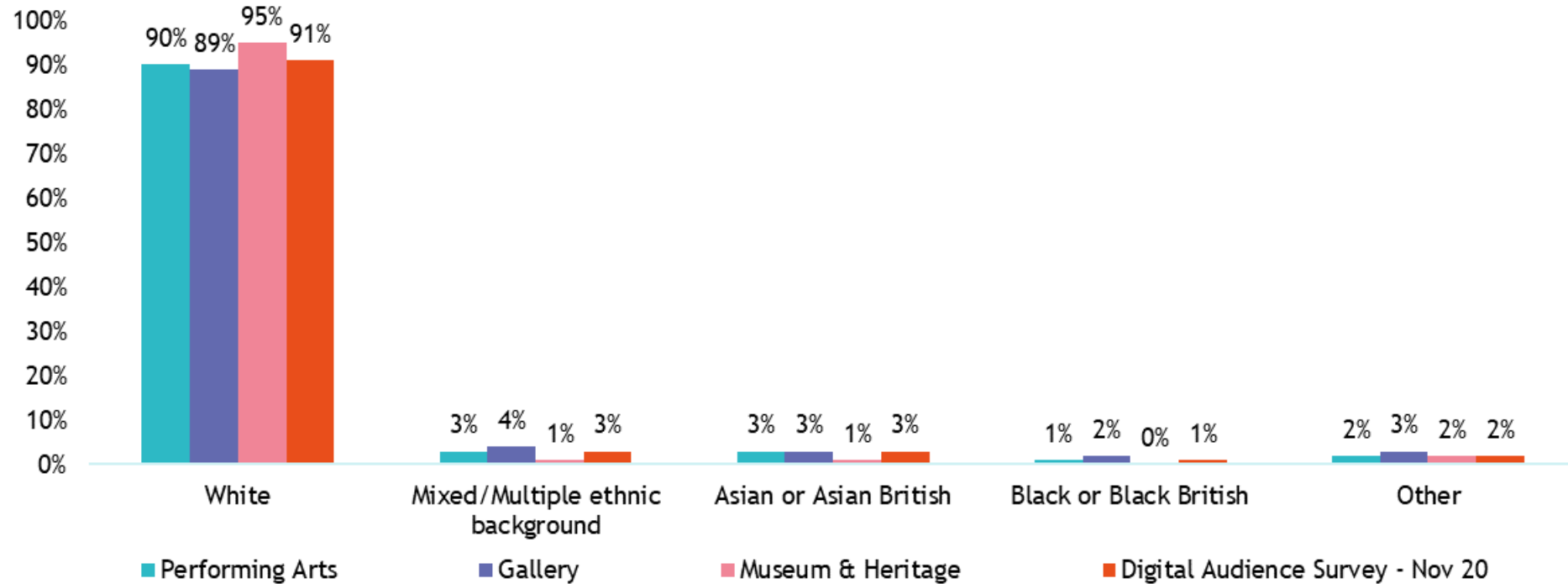
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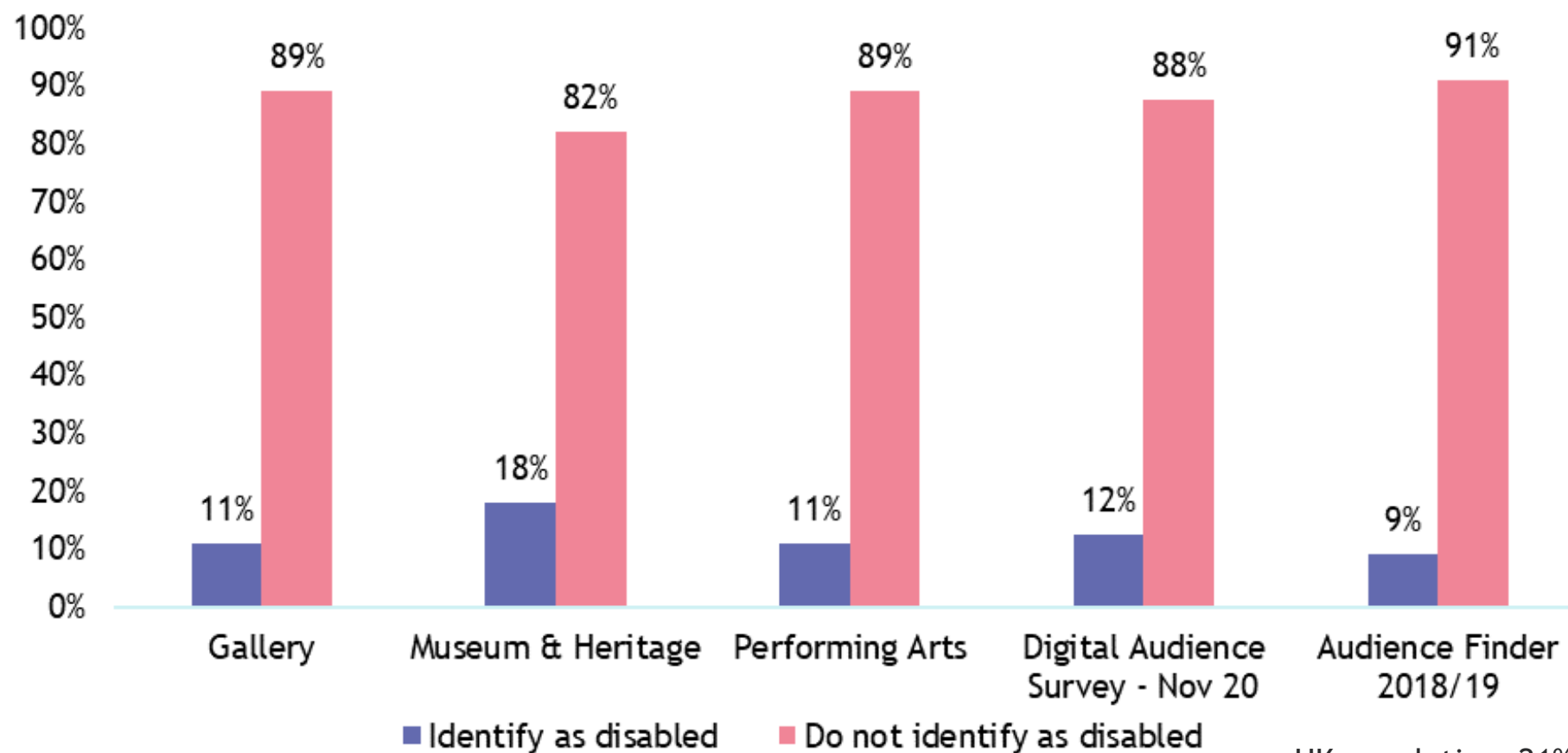


Ethnicity



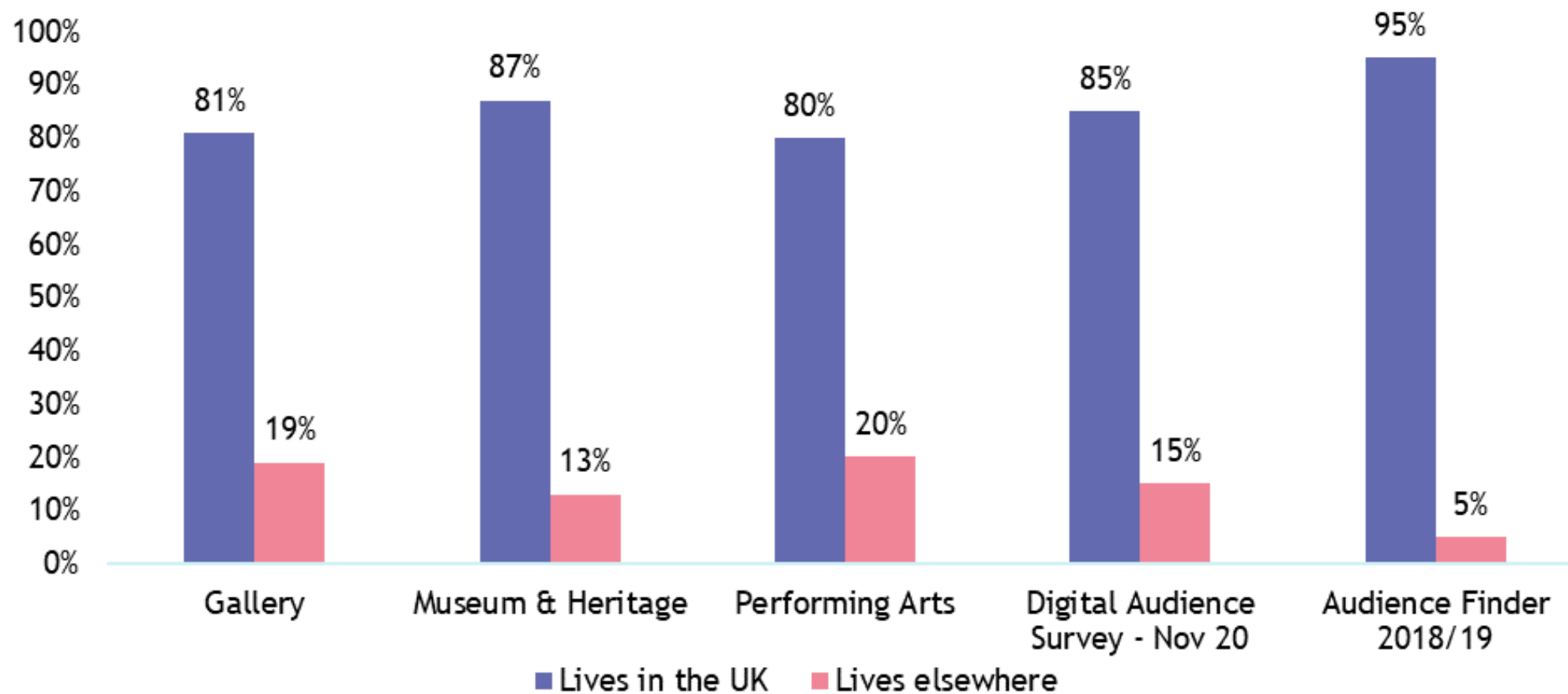
UK population: 87%, 2%, 7%, 3%, 1% respectively (2018 figures)

Disability

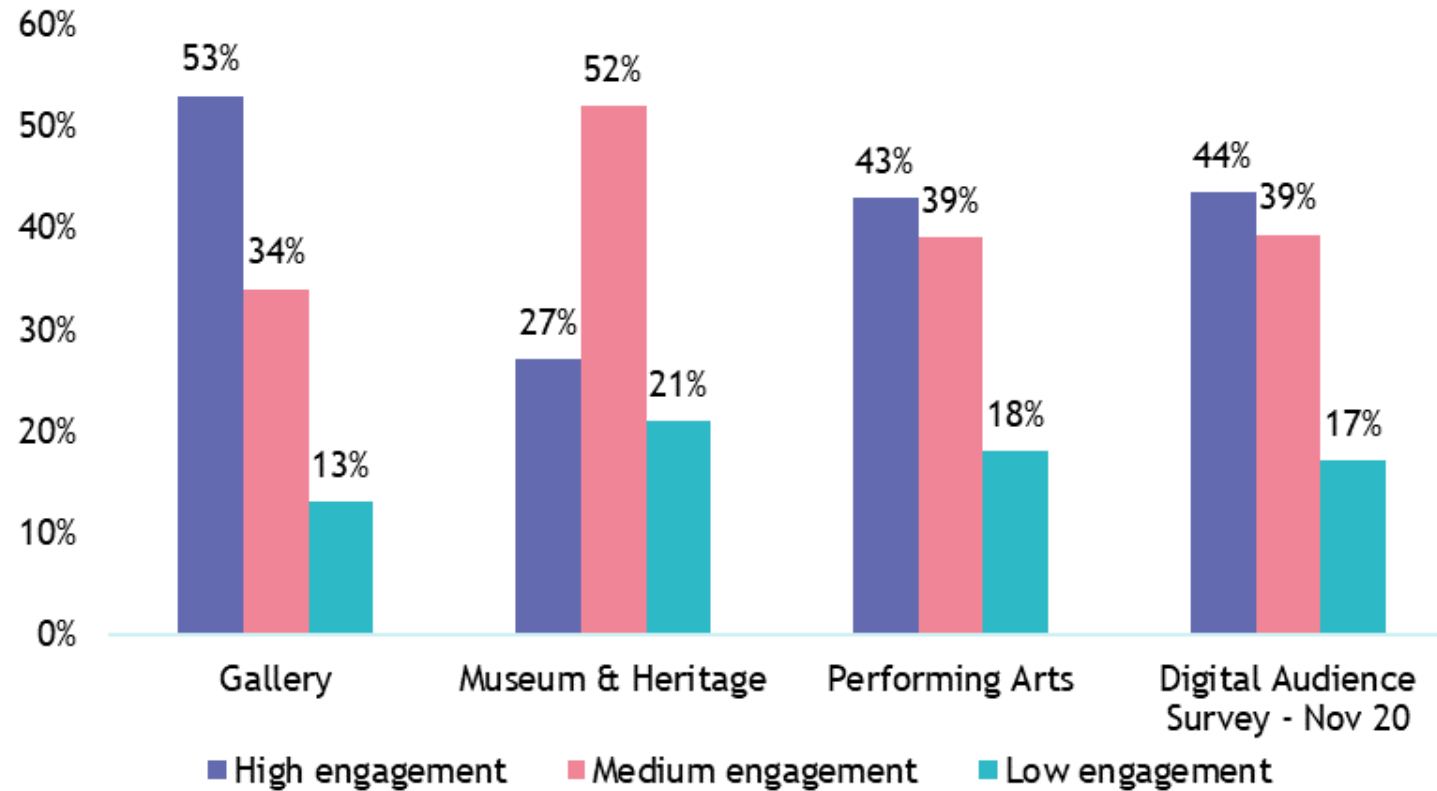


UK population: 21% (2018/19 figures)

Living in the UK/overseas

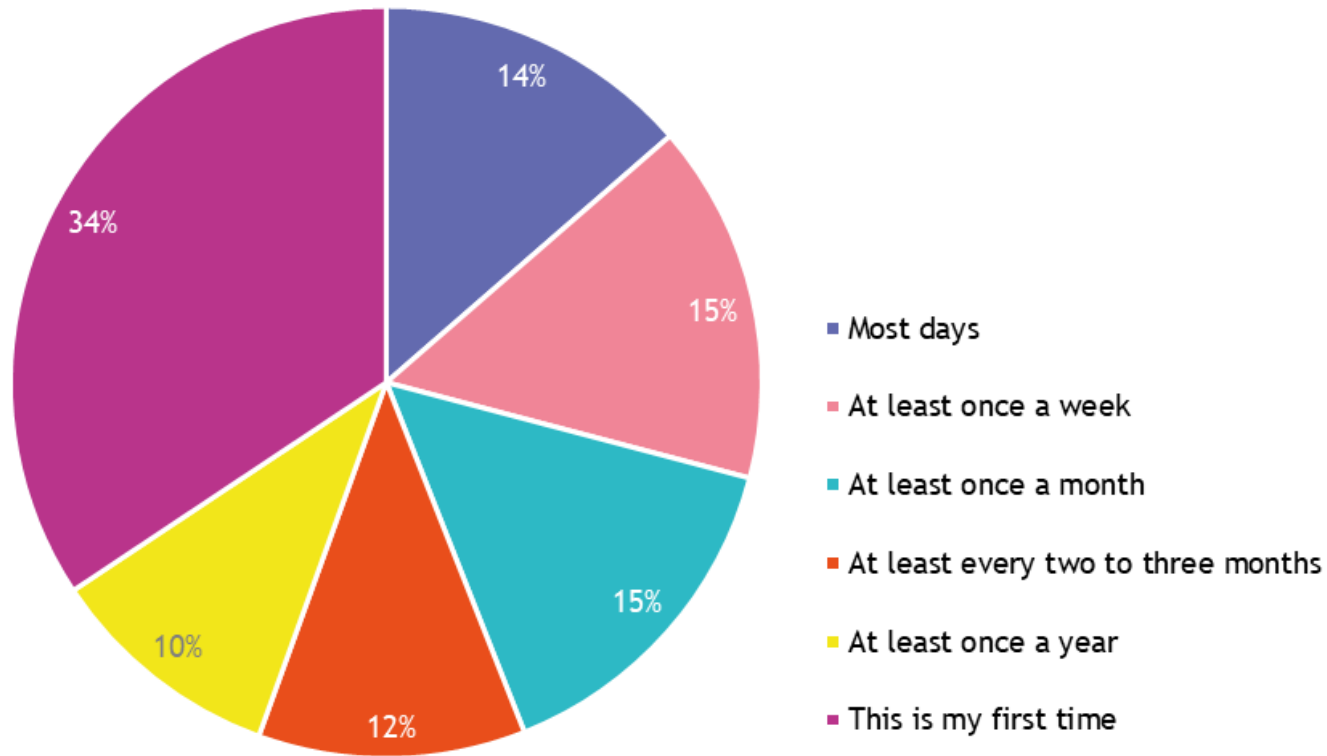


Levels of cultural engagement (by Audience Spectrum)



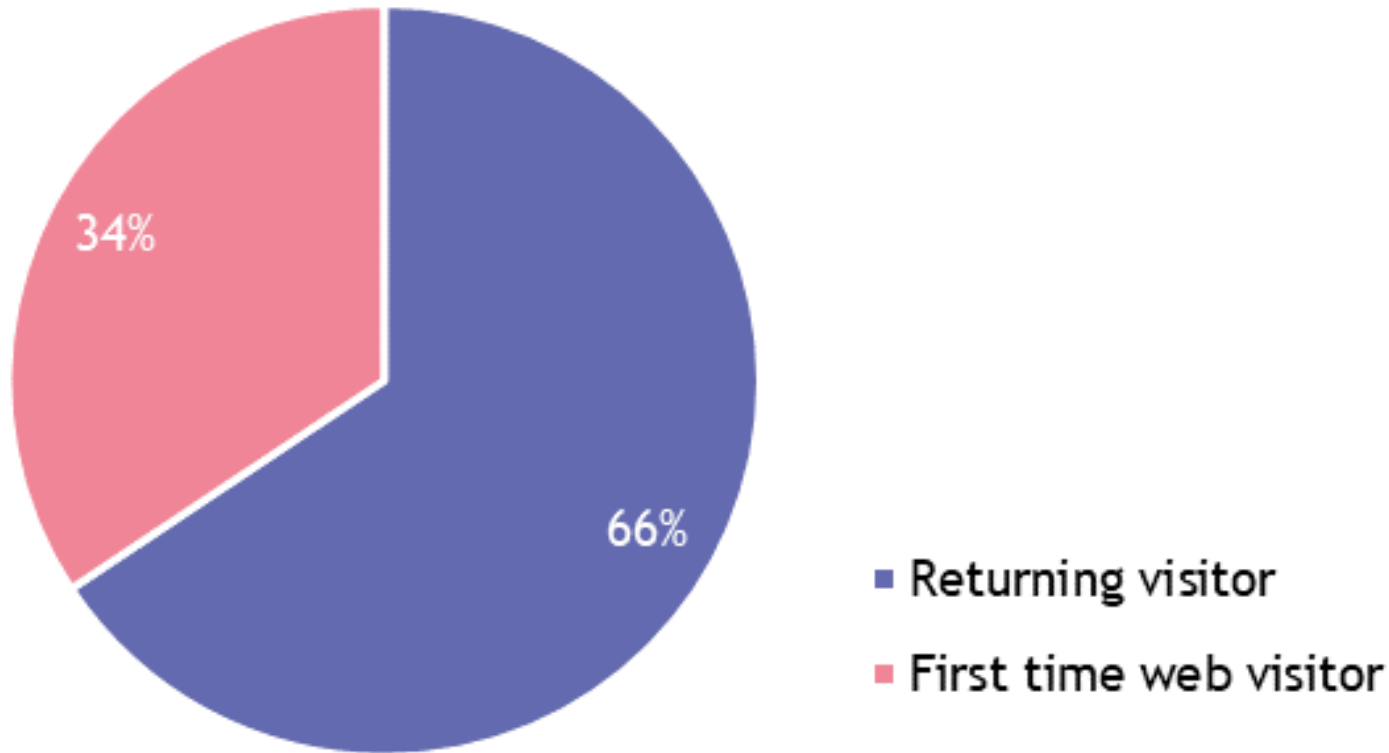
Frequency of visits

Around 1 in 4 visit once a week or more



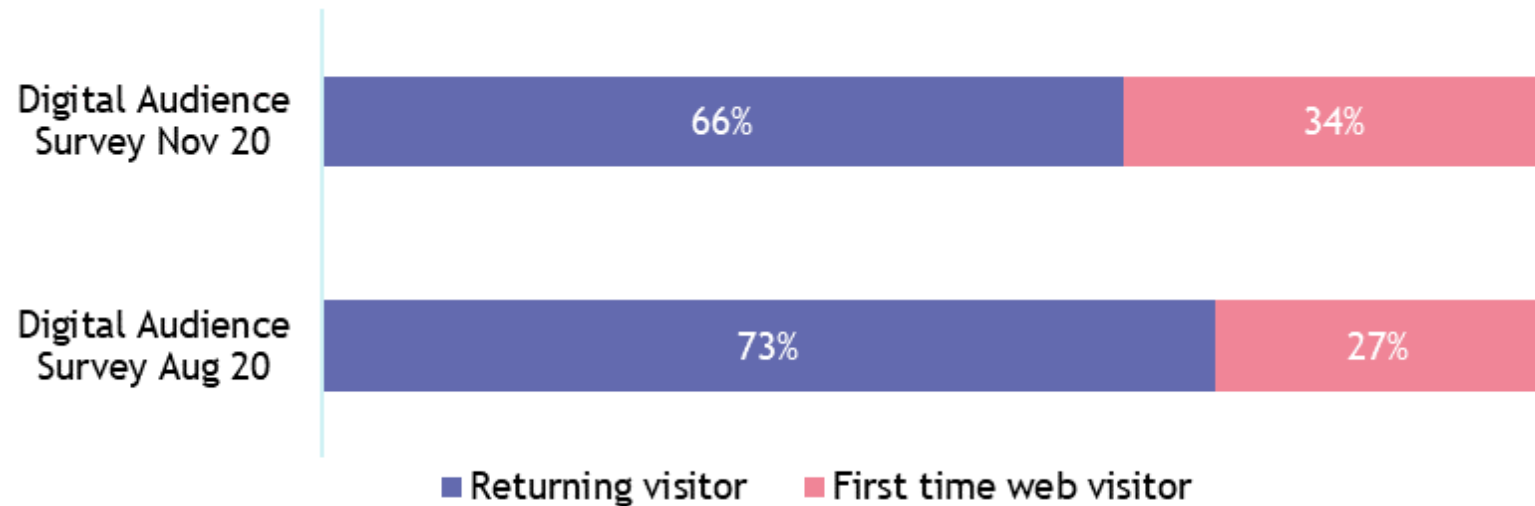
n = 6,321 Digital Audience Survey Nov 20
Question: On average, how often do you visit our website or social media platforms to watch/read our digital content?

Around 1 in 4 visit once a week or more,
with a third being first timers



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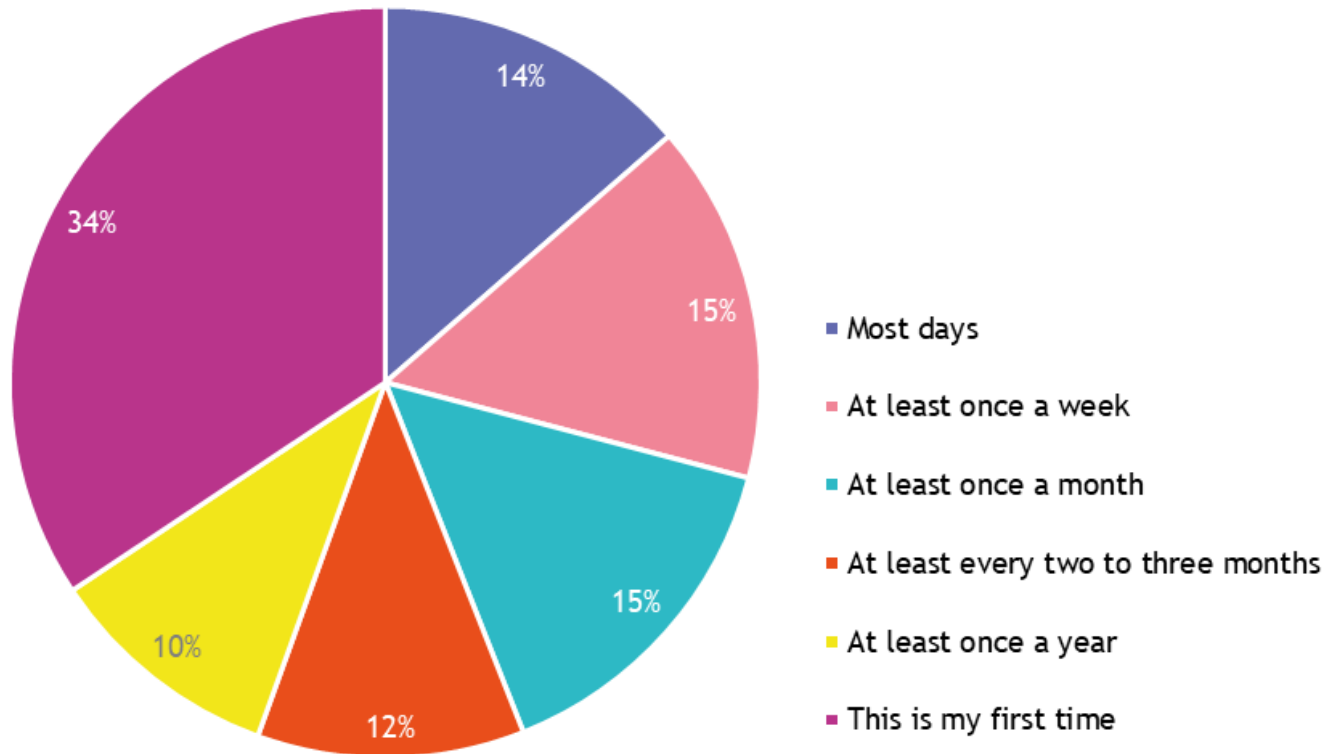
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Increase in first time
web visitors since
Aug 20

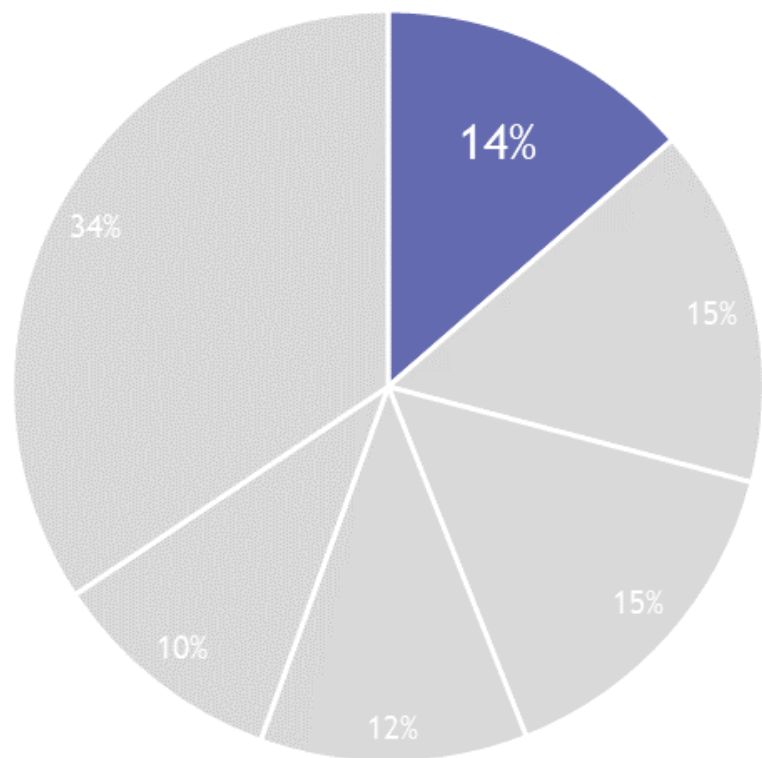
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Who are those who visit ‘Most days’?



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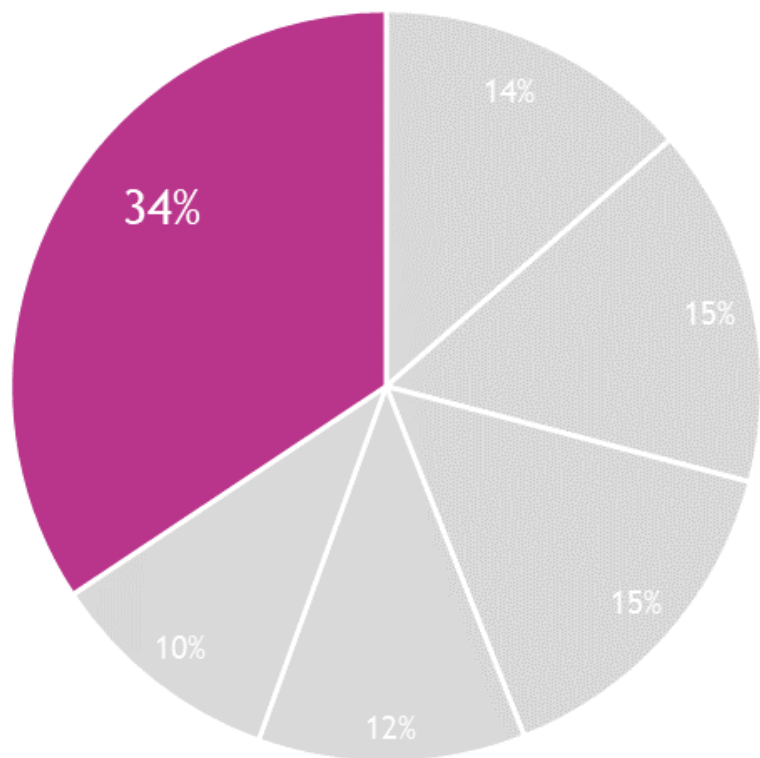


- Most days
- At least once a week
- At least once a month
- At least every two to three months
- At least once a year
- This is my first time

74% freq. increased cf. pre-COVID
(44% 'significantly'; 25% 'about the same')
45% visited in last 12 months; 40% never
More likely to be sharing opinions,
conducting research or investigating
membership

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Who are those who are visiting 'For the first time'?



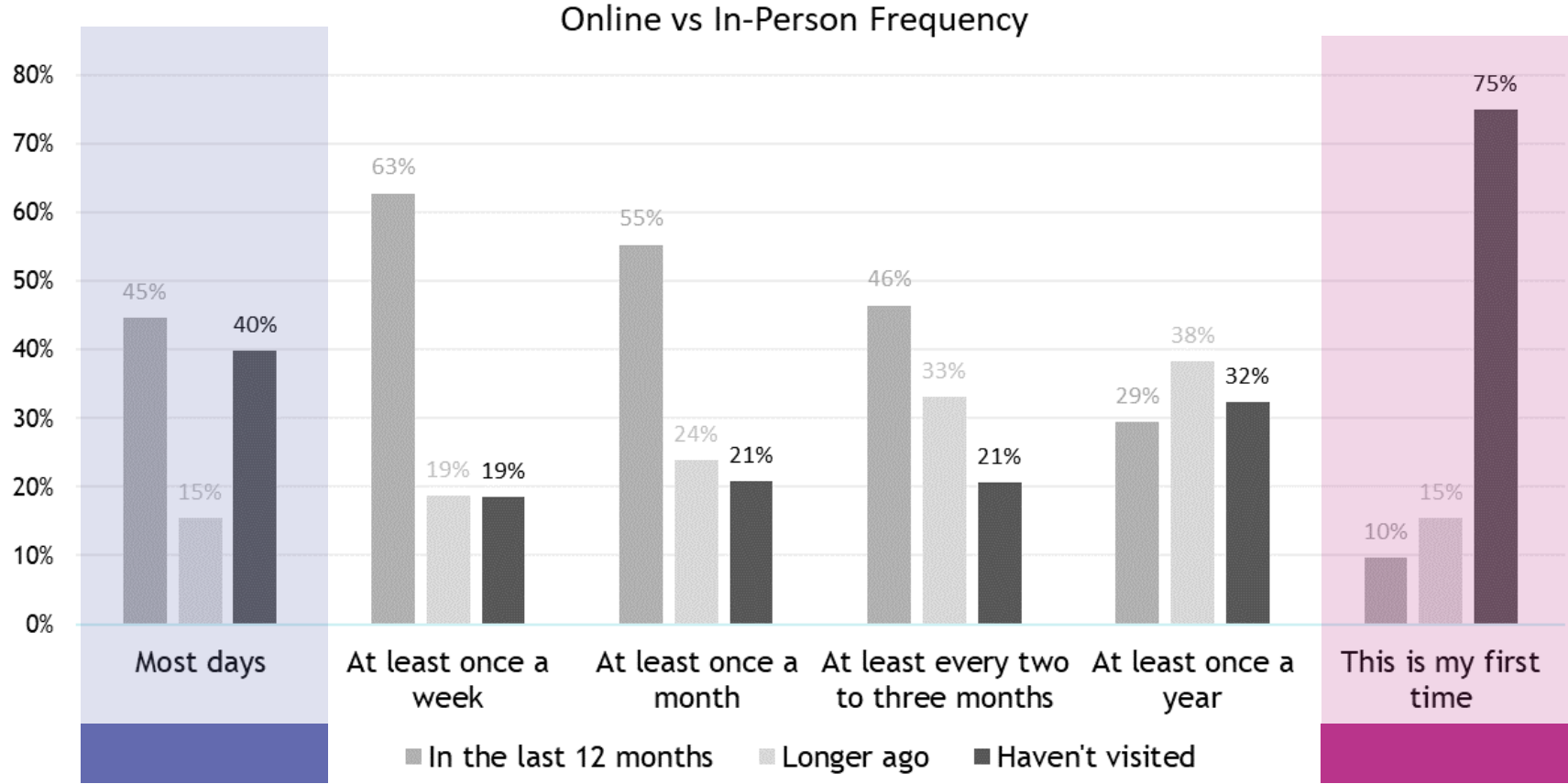
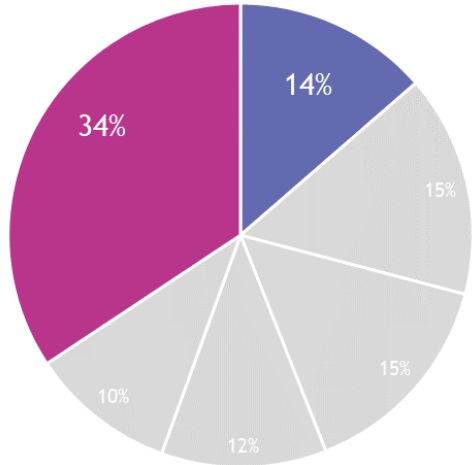
- Most days
- At least once a week
- At least once a month
- At least every two to three months
- At least once a year
- This is my first time

10% visited in last 12 months; 75% never
1.5x more likely to be 16-19 than overall
(over half of this group)

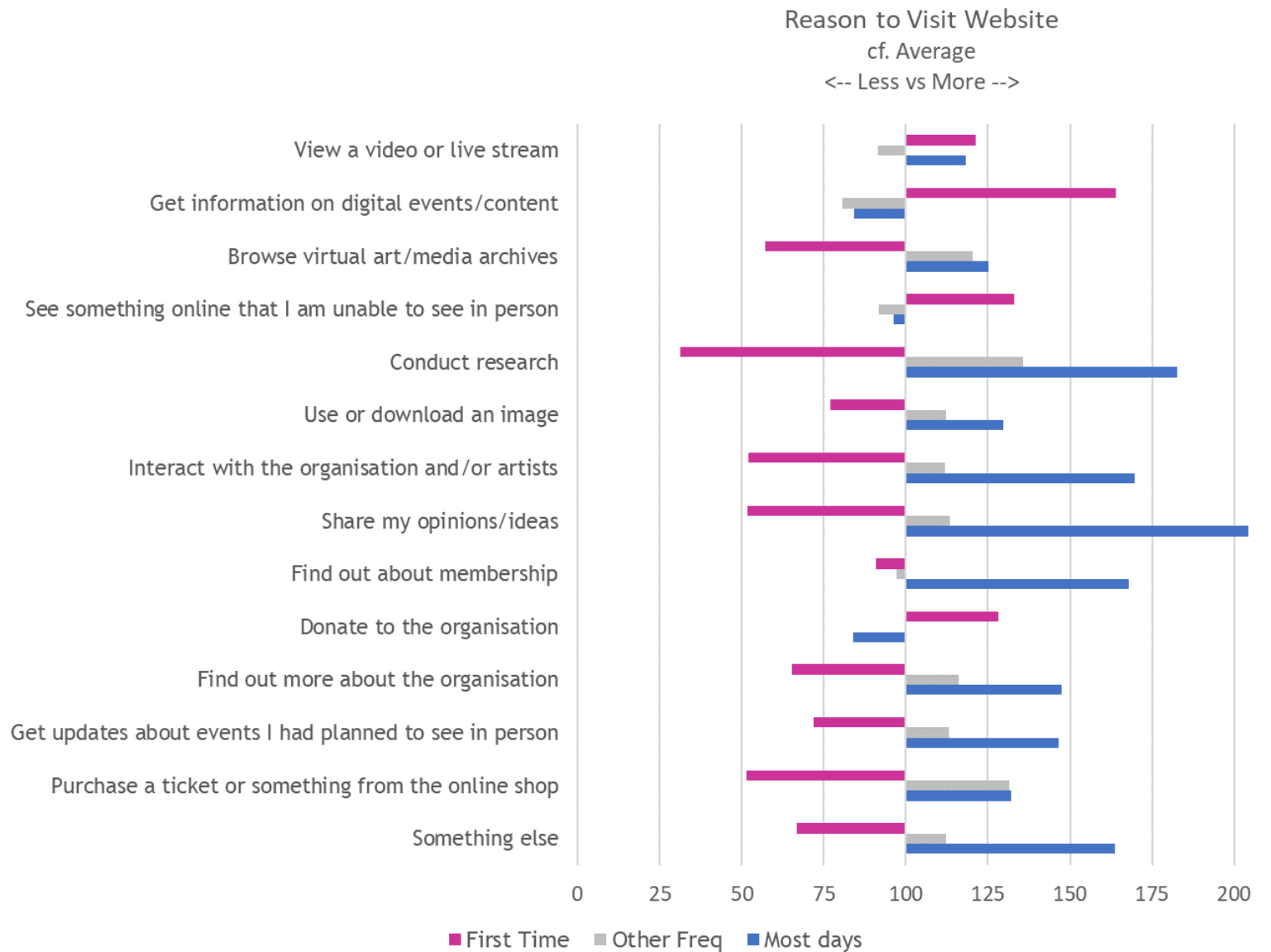
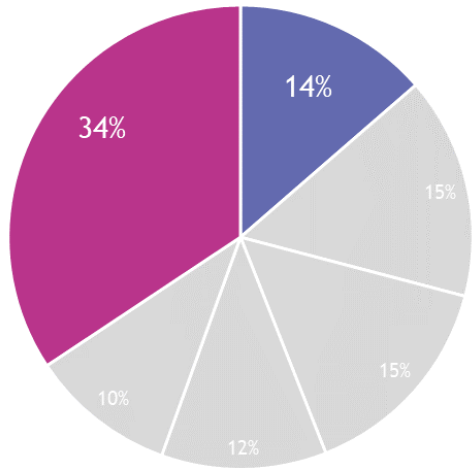
More likely to be looking to get info on
digital events/content or to make a
donation

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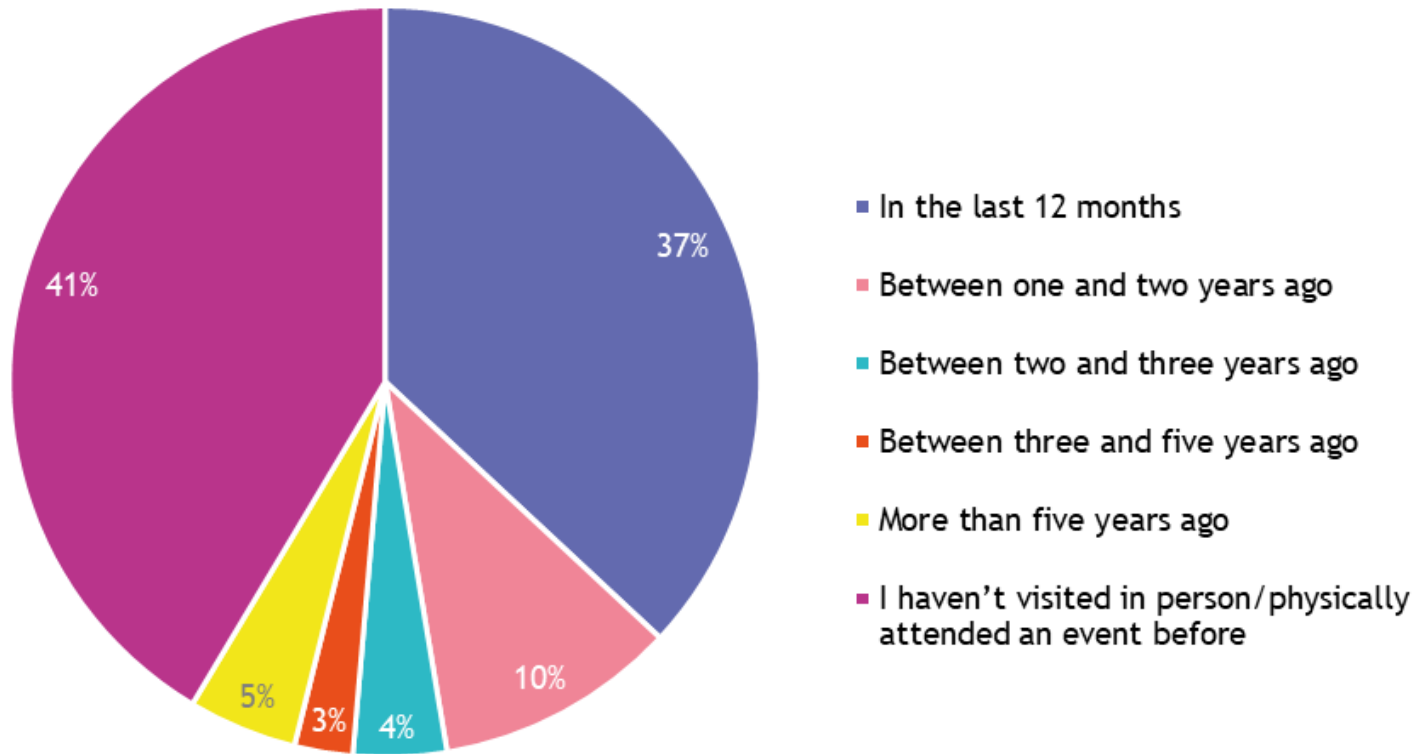
Who are those who visit 'Most days' / 'For the first time'?



Who are those who visit 'Most days' / 'For the first time'?

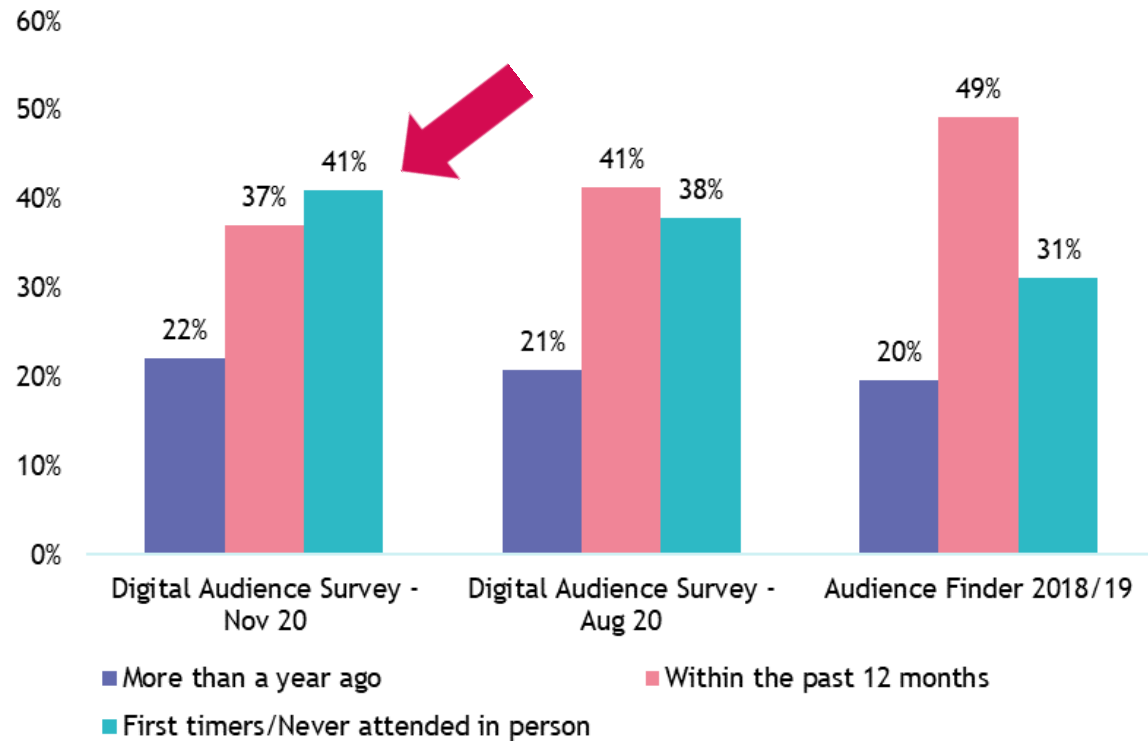


Around 1 in 3 are recent in-person attenders



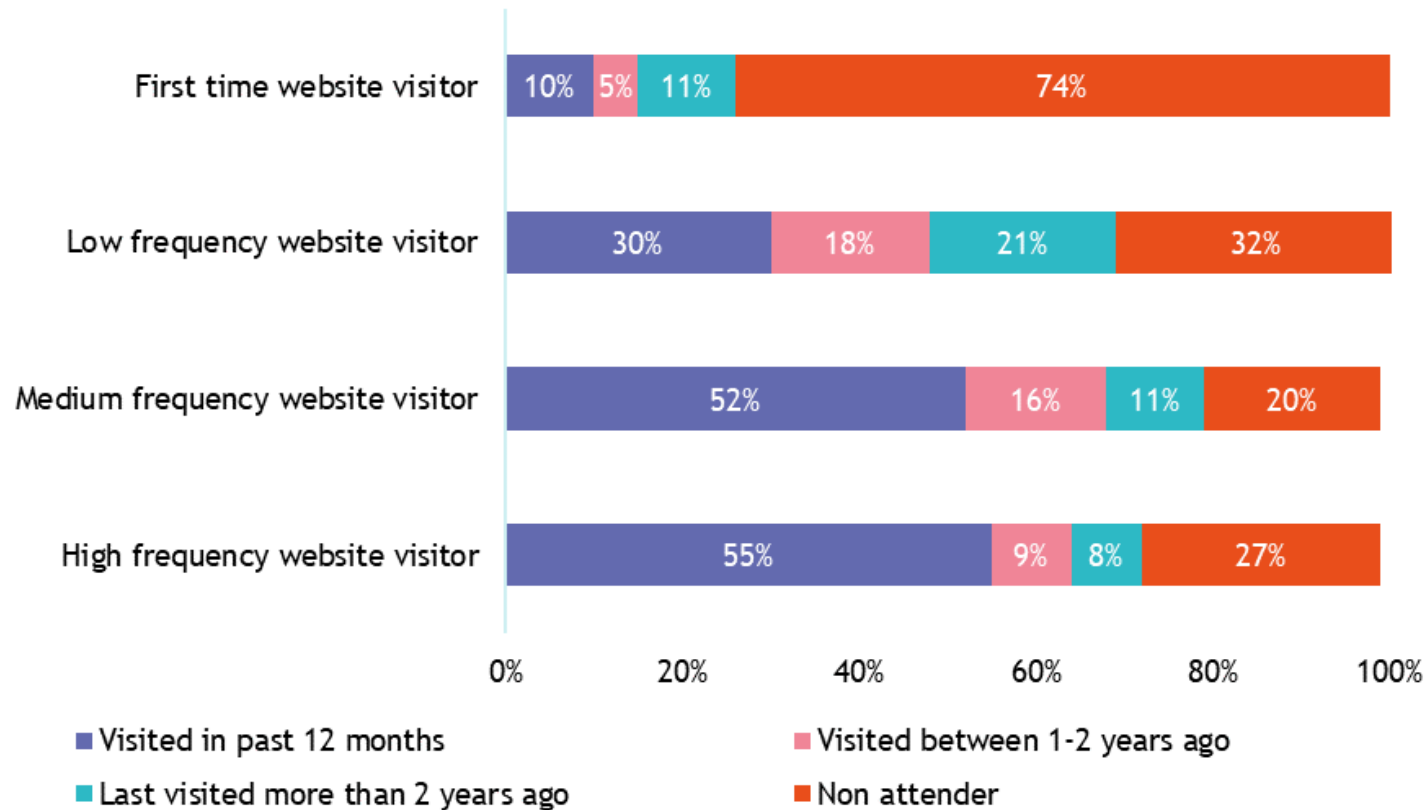
n = 6,444 Digital Audience Survey Nov 20
Question: When did you last visit us in person/physically attend one of our events?

Around 1 in 3 are recent in-person attenders,
while 41% have never attended in-person



n = 6,444 Digital Audience Survey Nov 20
n = 3,603 Digital Audience Survey Aug 20
n = 240,932 Audience Finder Benchmark 2018/19
Question: When did you last visit us in person/physically attend one of our events?

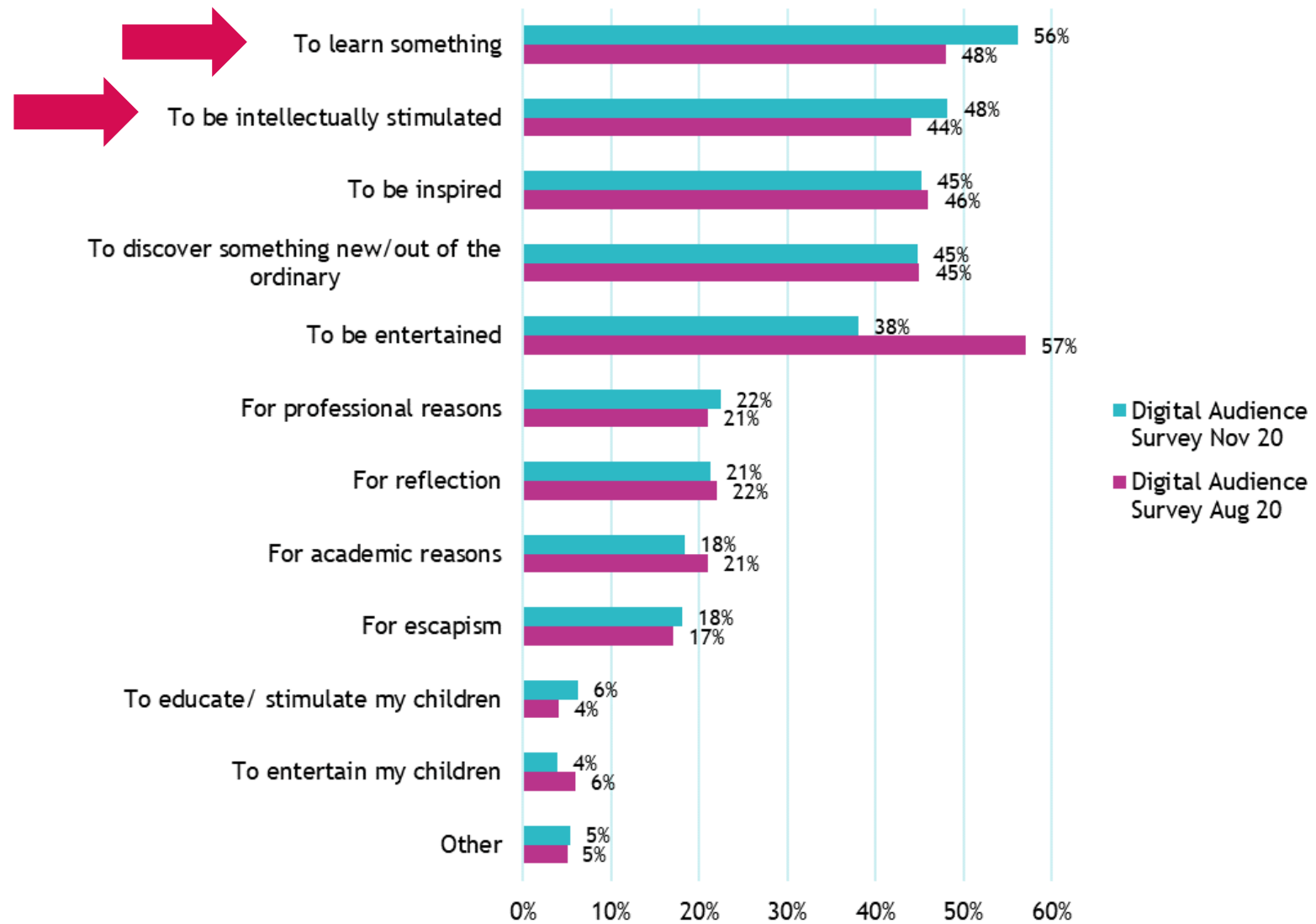
...and more in-person = more online



n = 6,247 Digital Audience Survey Nov 20
Question: When did you last visit us in person/physically attend one of our events?

Motivations and actions

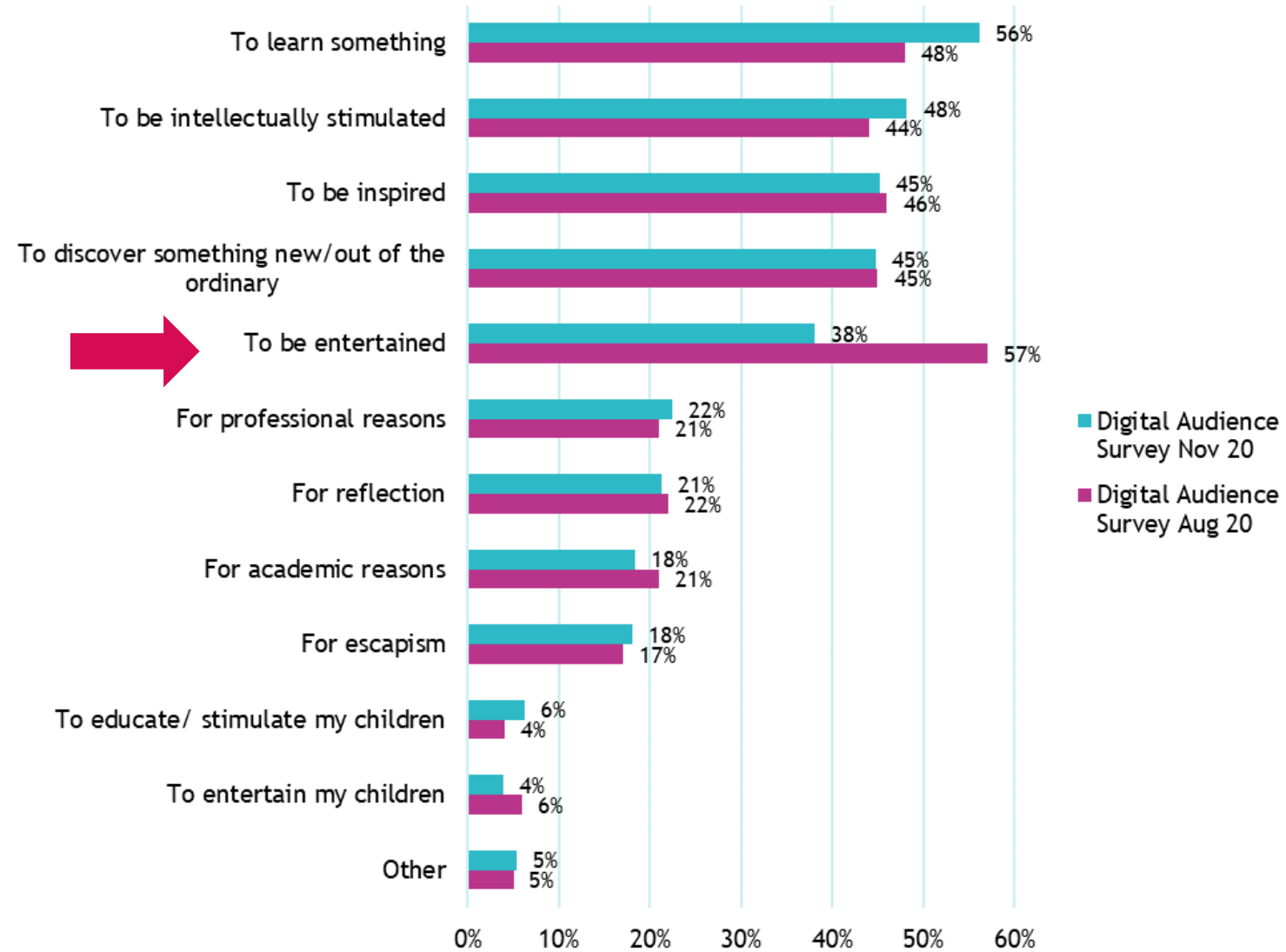
Visitors are motivated intellectually



n = 4,419 Digital Audience Survey Nov 20
n = 2,519 Digital Audience Survey Aug 20
Question: Which of the following describe your motivations for visiting our website or social media platforms??

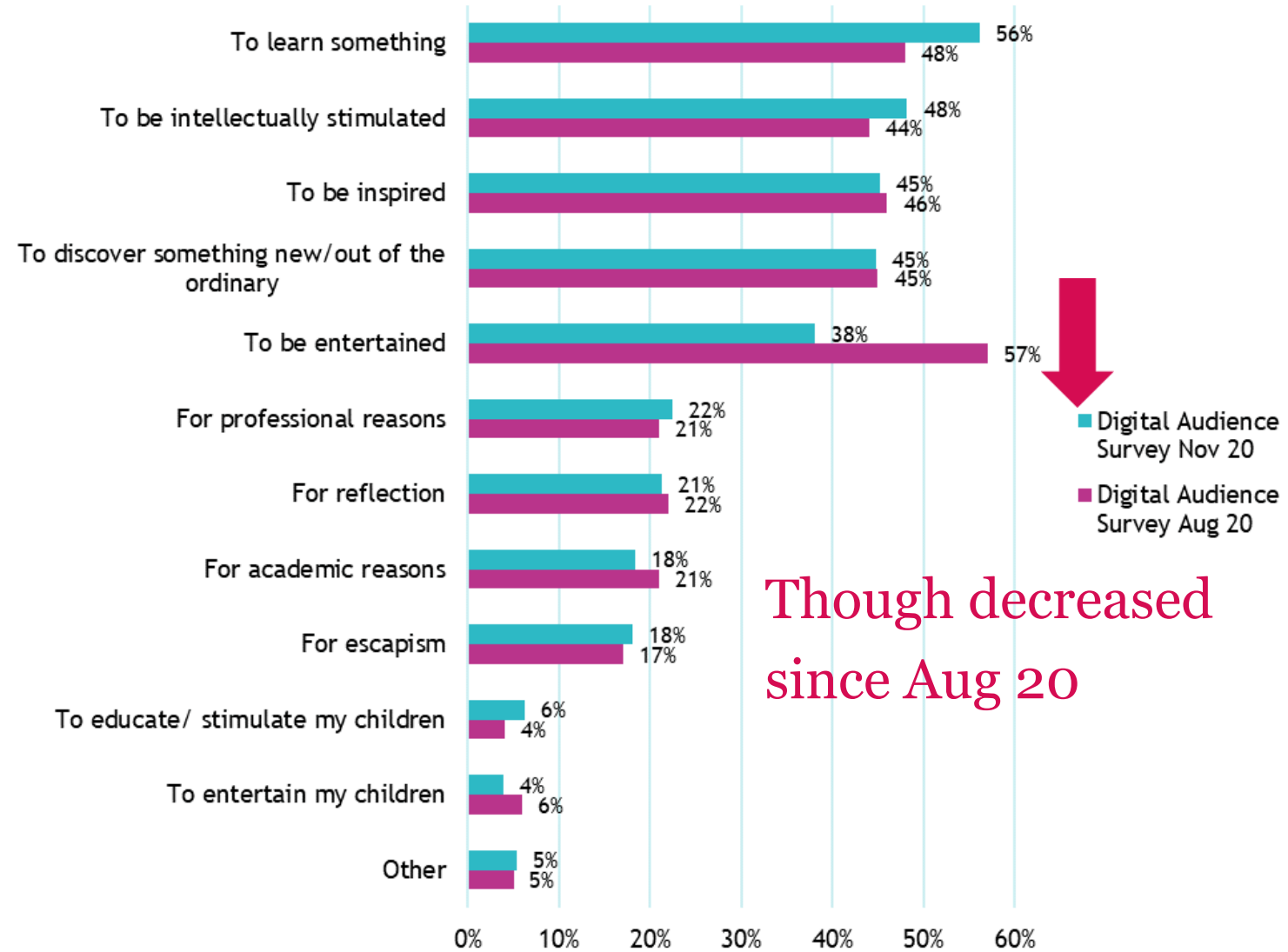
Visitors are motivated intellectually but also for entertainment

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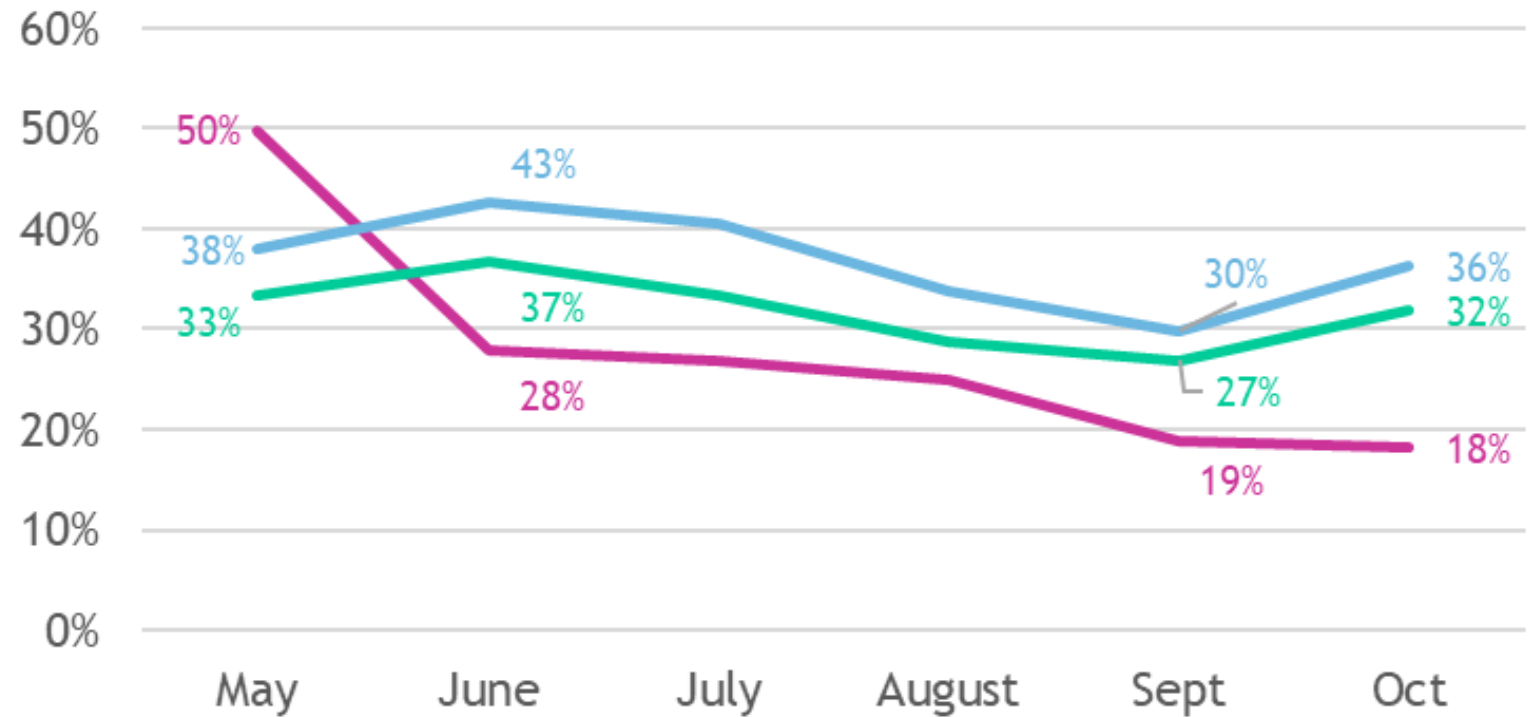
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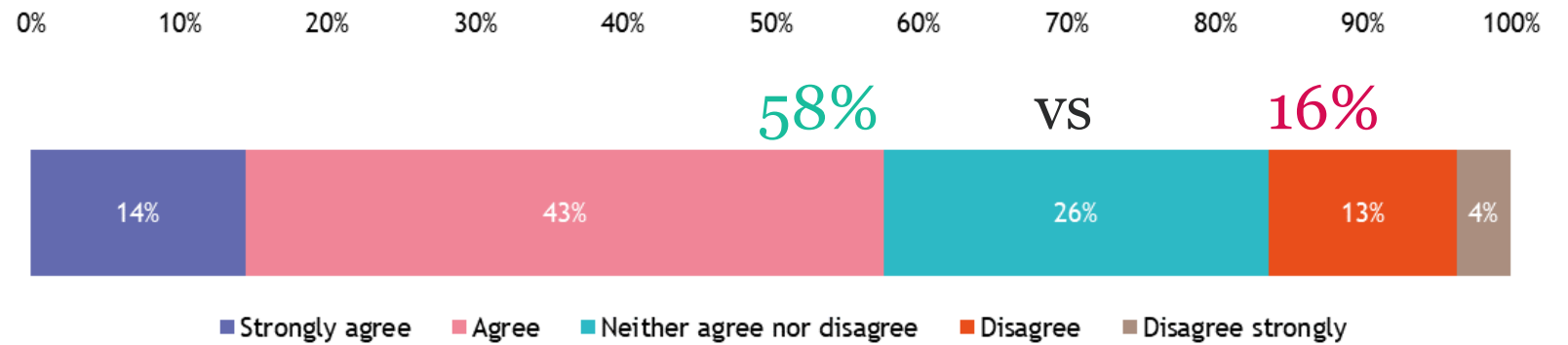
% Want to be Entertained, be Intellectually Stimulated or Learn Something



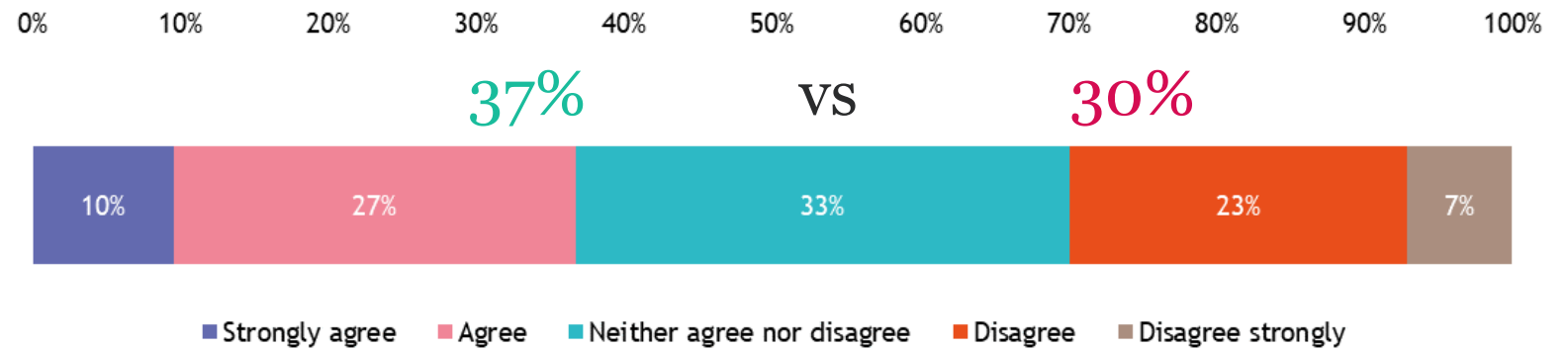
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Question: Which of the following describe your motivations for visiting our website or social media platforms??

Visitors are motivated intellectually but also for entertainment and emotions

'I am engaging... to boost my mood'



'I am engaging... to reduce stress/anxiety'

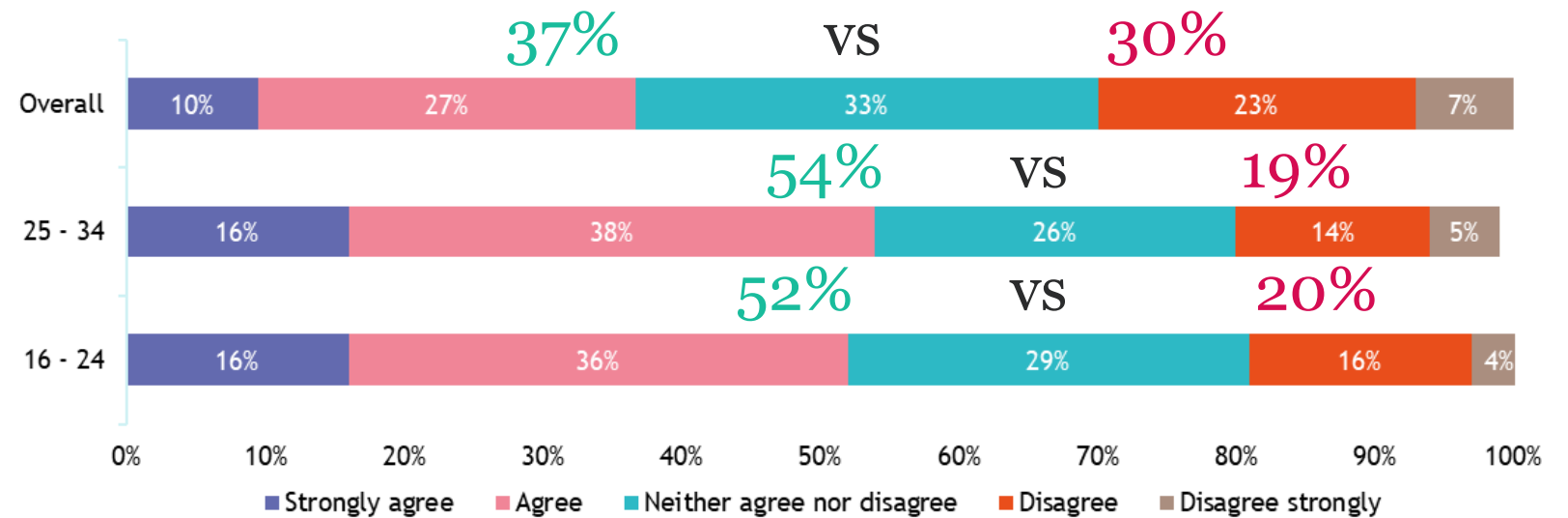


n = 6,281 / 6,165 Digital Audience Survey Nov 20

Visitors are motivated intellectually but also for entertainment and emotions

Highest for 16 – 24 and 25 – 34 age groups

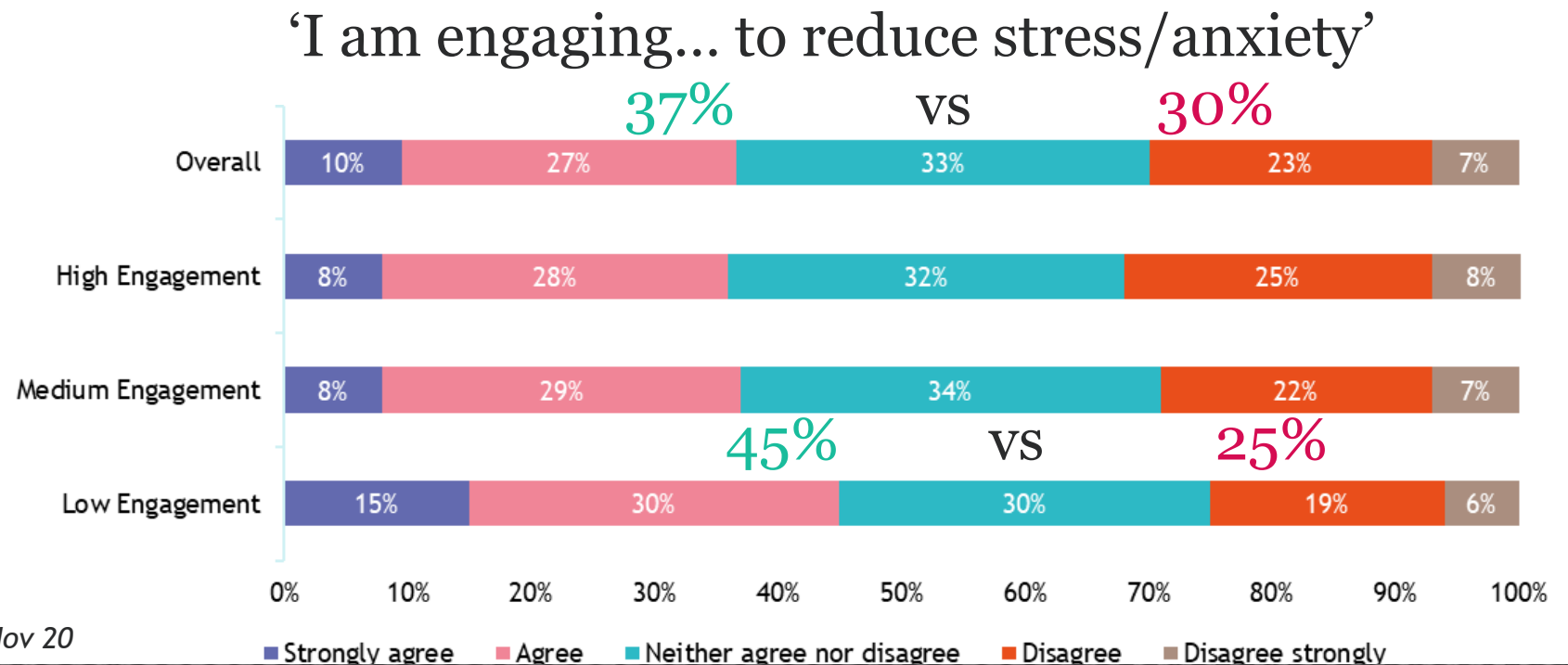
‘I am engaging... to reduce stress/anxiety’



n = 6,165 / 669 / 418 Digital Audience Survey Nov 20

Visitors are motivated intellectually but also for entertainment and emotions

Highest for lower culturally engaged

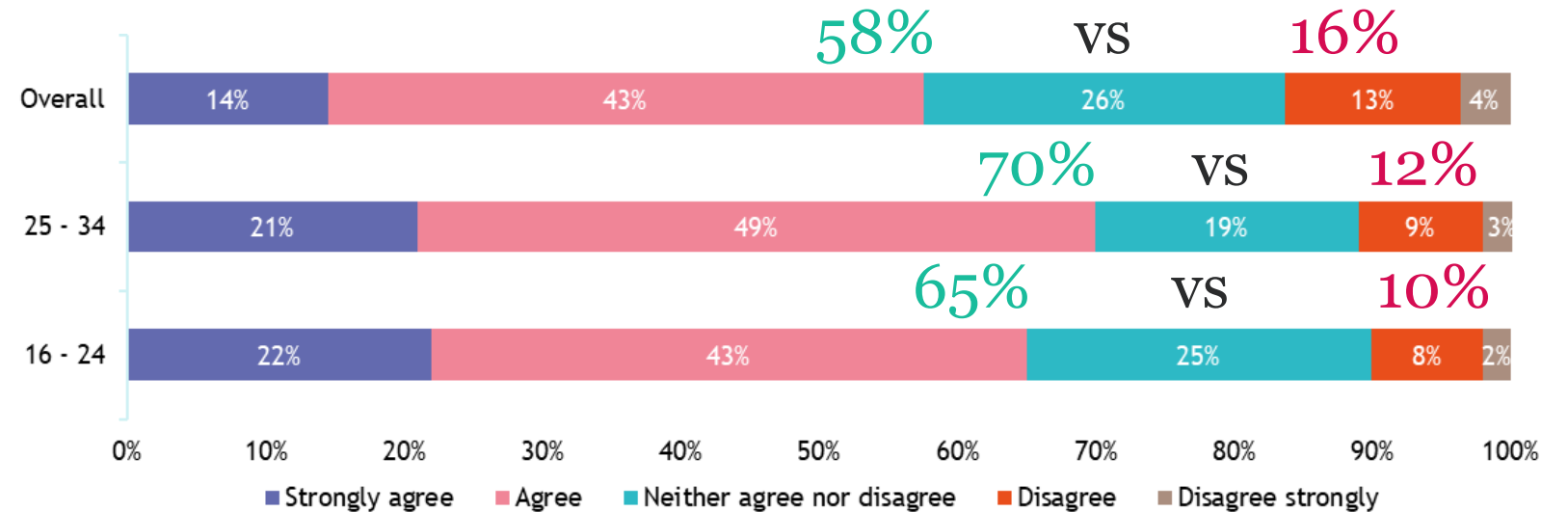


n = 6,165 / 1,647 / 1,488 / 643 Digital Audience Survey Nov 20

Visitors are motivated intellectually but also for entertainment and emotions

Highest for 16 – 24 and 25 – 34 age groups

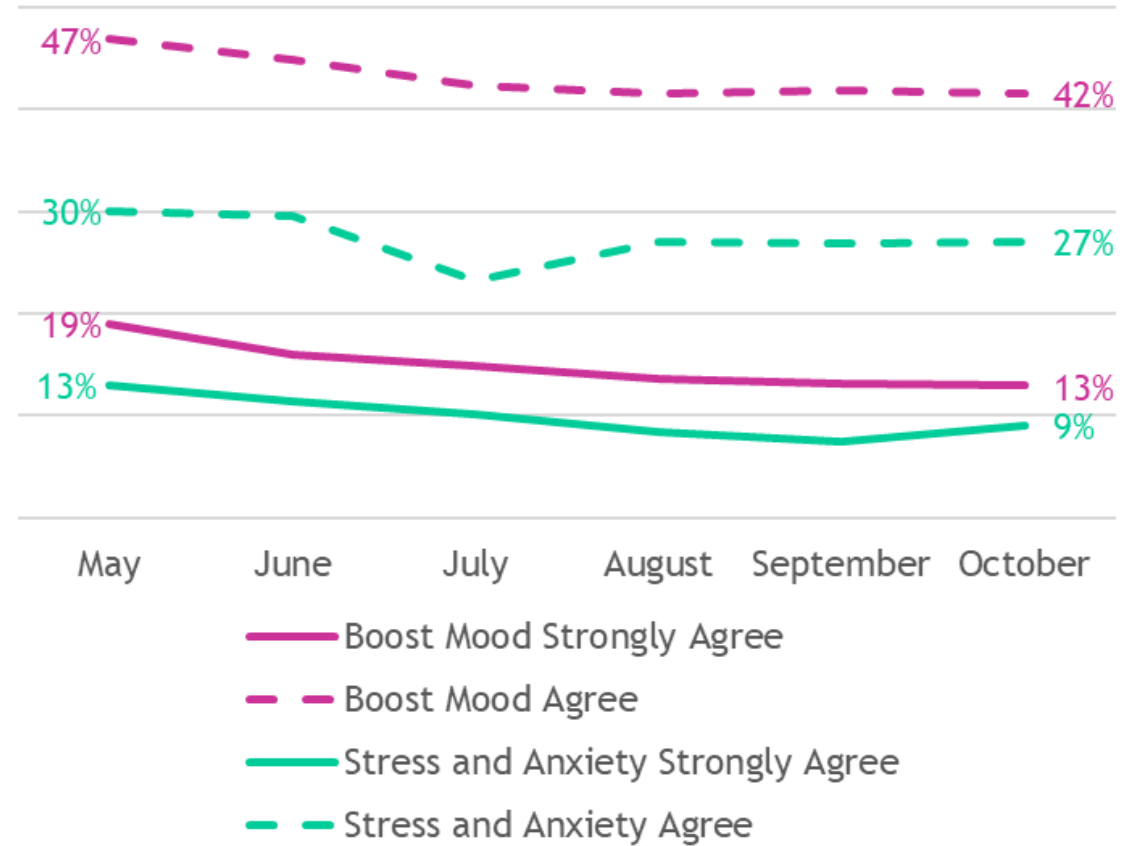
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n = 6,281 / 669 / 418 Digital Audience Survey Nov 20

Visitors are motivated intellectually but also for entertainment and emotions

Engaging to Boost Mood / Reduce Stress & Anxiety



n = 6,281 / 669 / 418 Digital Audience Survey Nov 20

Differences by art form / sector

Gallery website visitors are more likely... (vs overall)

To be a first time web visitor (49% vs 34%): of which 80% have never physically attended the organisations (vs. 74%)

To be from Black, Asian and other minority ethnicities* (11% vs 9%)

To be highly culturally engaged (53% vs 44%)

To purchase a ticket or something from the online shop (18% vs. 11%)

*The sample size is currently not large enough to differentiate the proportions from more specific groups.

Performing Arts website visitors are more likely... (vs overall)

To be a return web visitor (80% vs 66%)

To be from a balance of age groups, reflecting the UK population

To engage...to boost my mood (65% agree vs 58%)

To view more online...than before Covid (68% agree vs 61%)

To view a video or live stream (45% vs 26%)

To donate to the organisation (4% vs 2%)

Museum & Heritage website visitors are more likely... (vs overall)

To be a return web visitor (80% vs 66%)

To have increased frequency of visits since Covid (66% vs 58%)

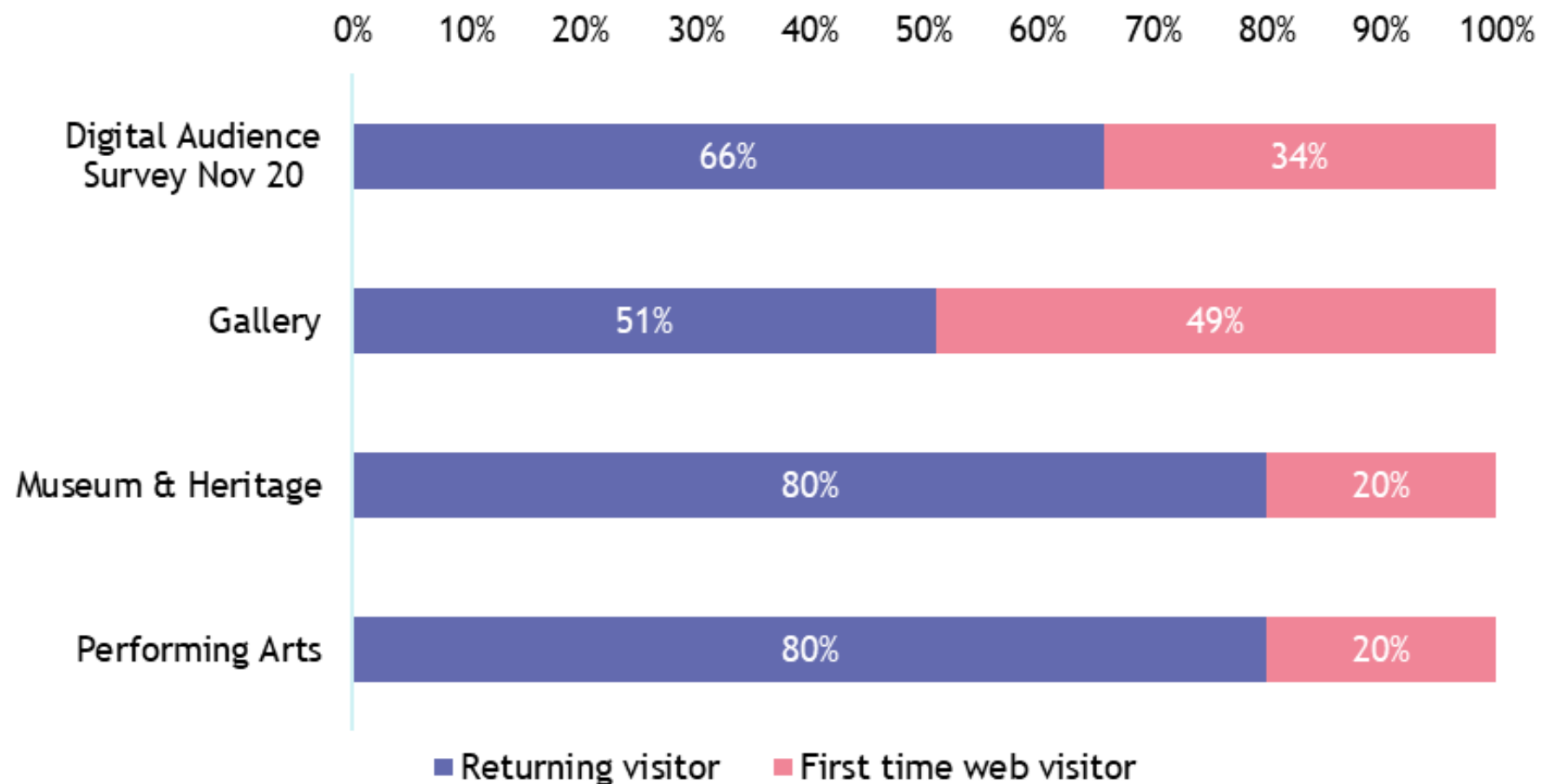
To be aged 55 or over (54% vs. 47%)

To identify as disabled (18% vs 12%)

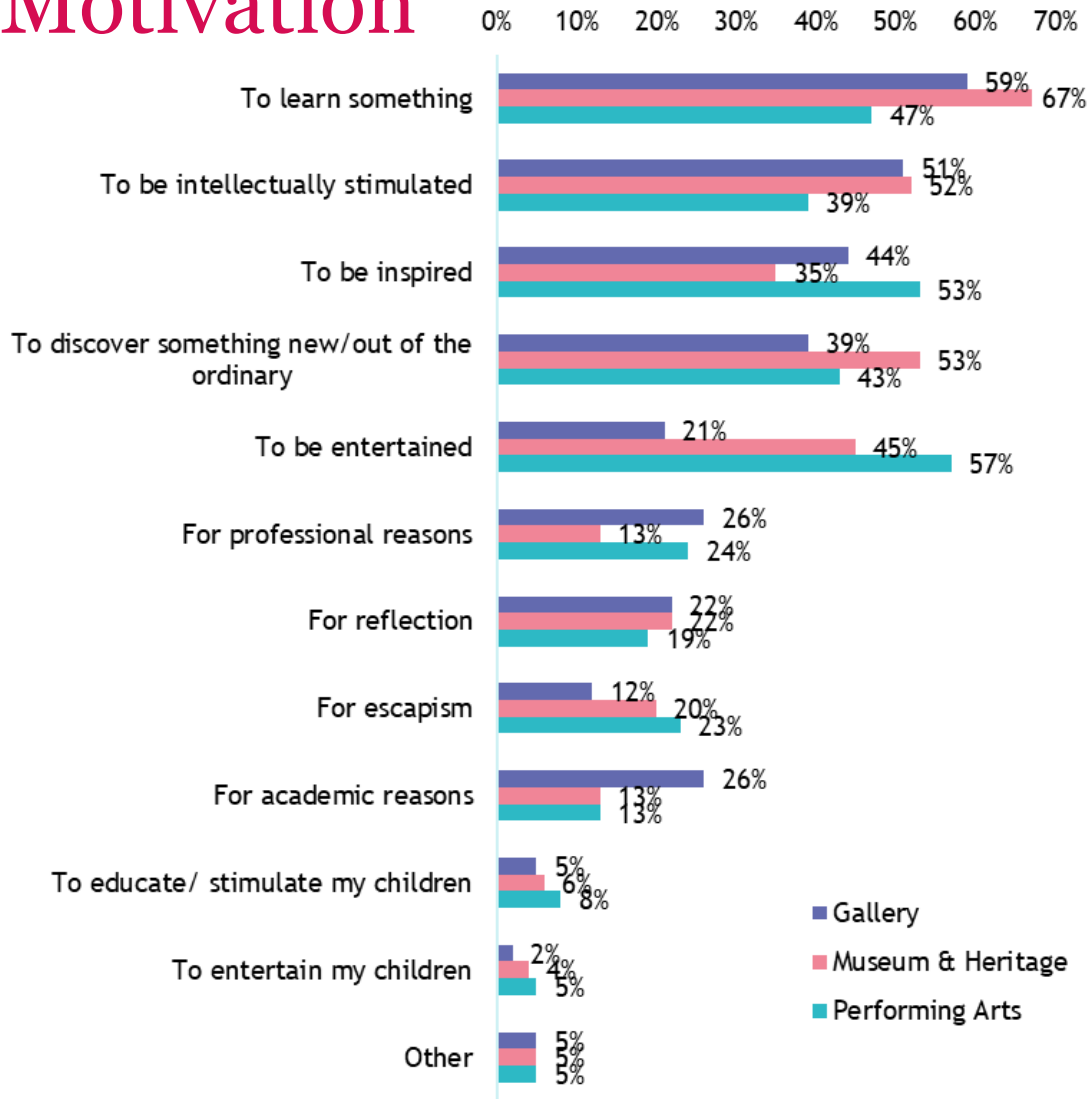
To be medium culturally engaged (52% vs 39%)

To 'see something...I am unable to see in-person' (29% vs 22%)

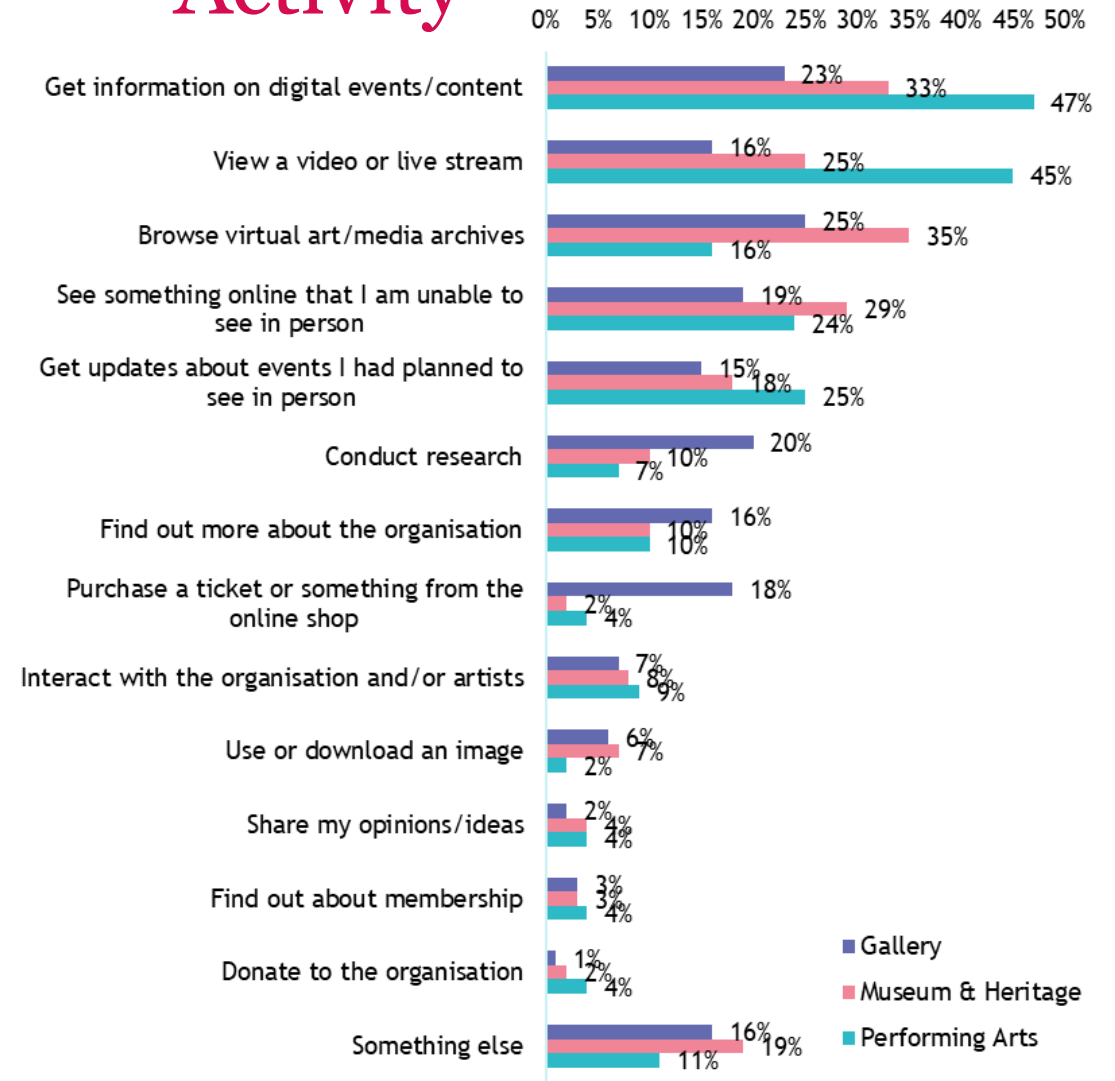
First time/returning web visitor



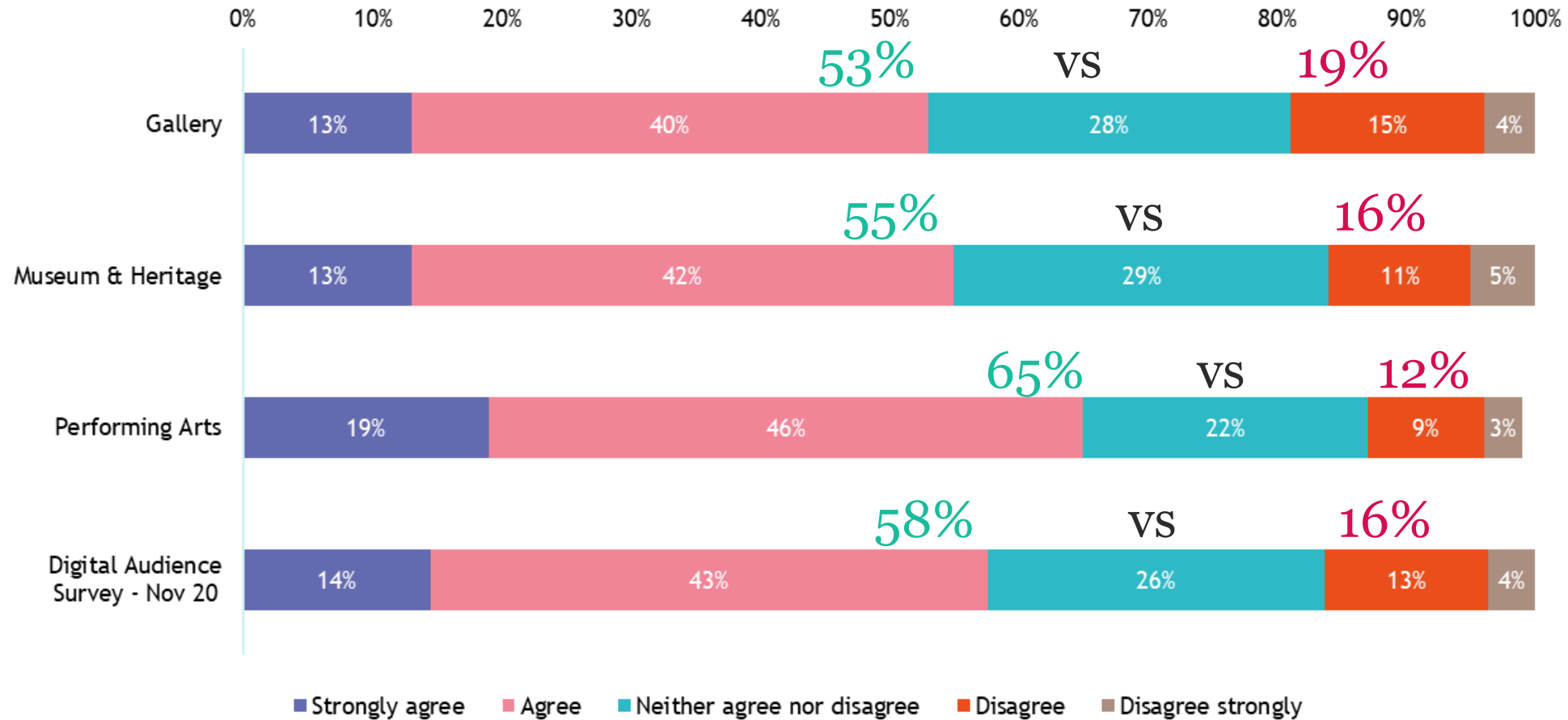
Motivation



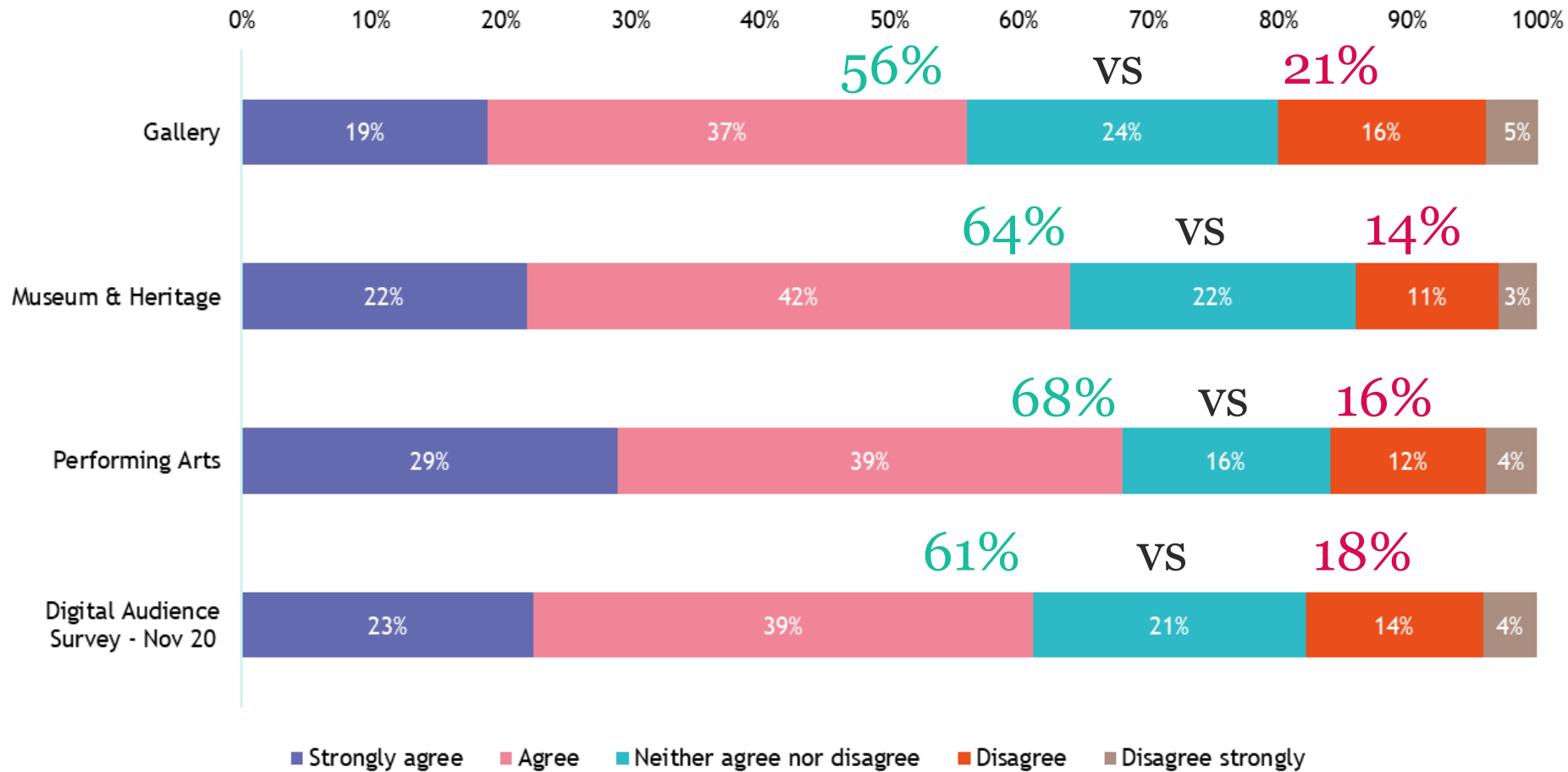
Activity



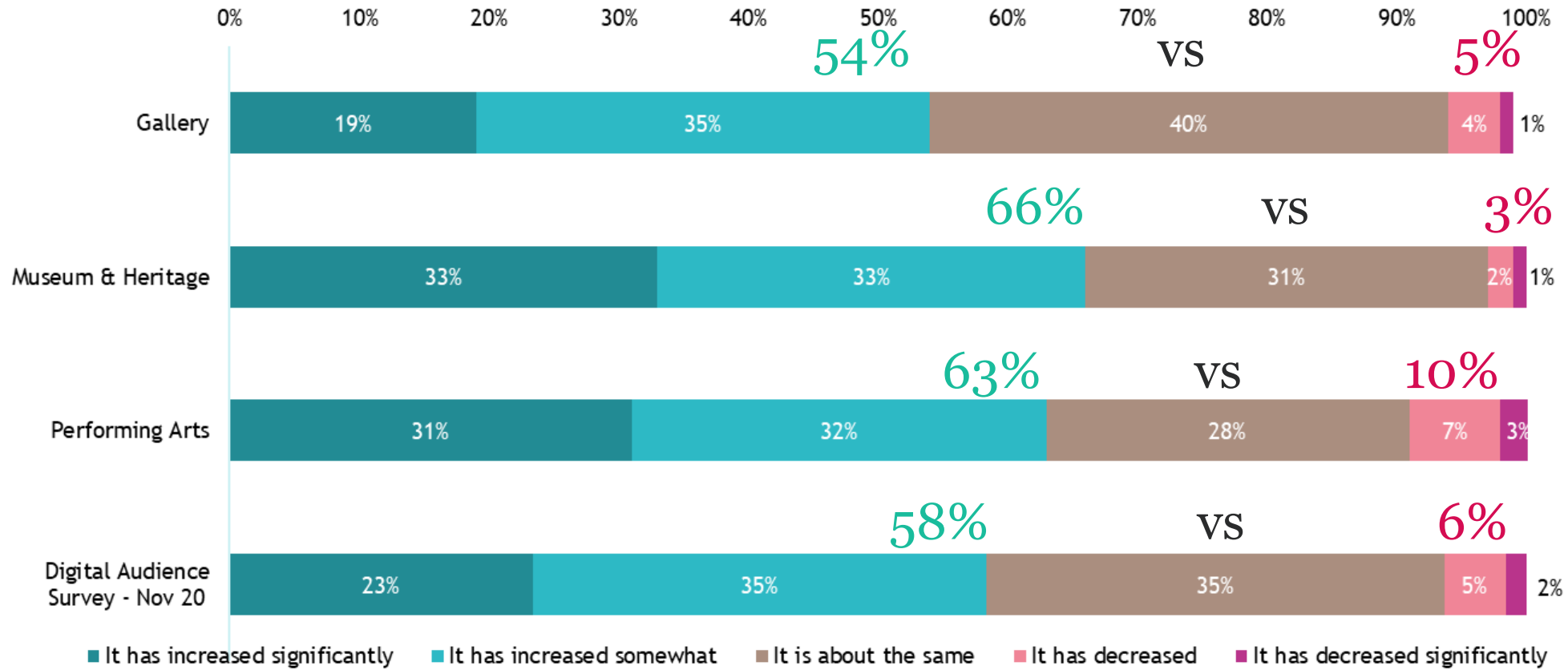
‘Engaging....to boost my mood’.



'Viewing more online...than before Covid'.



Change in frequency of [digital] visits since Covid



In Summary...

In Summary...

Profiles:

Inc. age and engagement levels

Different engagement patterns:

Frequency (linked to engagement / very different audiences)

Motivations and uses:

Esp. importance of emotion (for young / lower engaged groups)

Differences by sector for all of these...

So...

Differentiate & target

- for different audiences (behaviour, uses, profile)
- overlooked opportunities?
- cf. others

Consider the emotional experience

Link to wider experiences by group