The Audience Agency COVID-19 Cultural Participation Monitor Digital Findings

December 2020

the audience agency

About the Participation Monitor

the audience agency

About the COVID Monitor

Quantitative Research:

A population study of the impacts of COVID on cultural engagement, based on a longitudinal, nationally-representative online survey (via Dynata)

Wave 1 [which this reporting is based on] was 6,055 responses from Oct-Nov 2020

Later waves will be c. 1-2k every couple of months up to autumn 2021: 18k responses in total.

Background:

AHRC-funded, as part of Centre for Cultural Value's *COVID-19: Impacts on the cultural industries and the implications for policy* research project, lead by Ben Walmsley

- Sample of the whole population
- Covers all sectors
- Longitudinal (shows change over time)
- Linked to Audience Spectrum

About the Participation Monitor

What it includes:

- Physical/digital engagement with culture
- Wider leisure habits/attitudes
- Creative activities

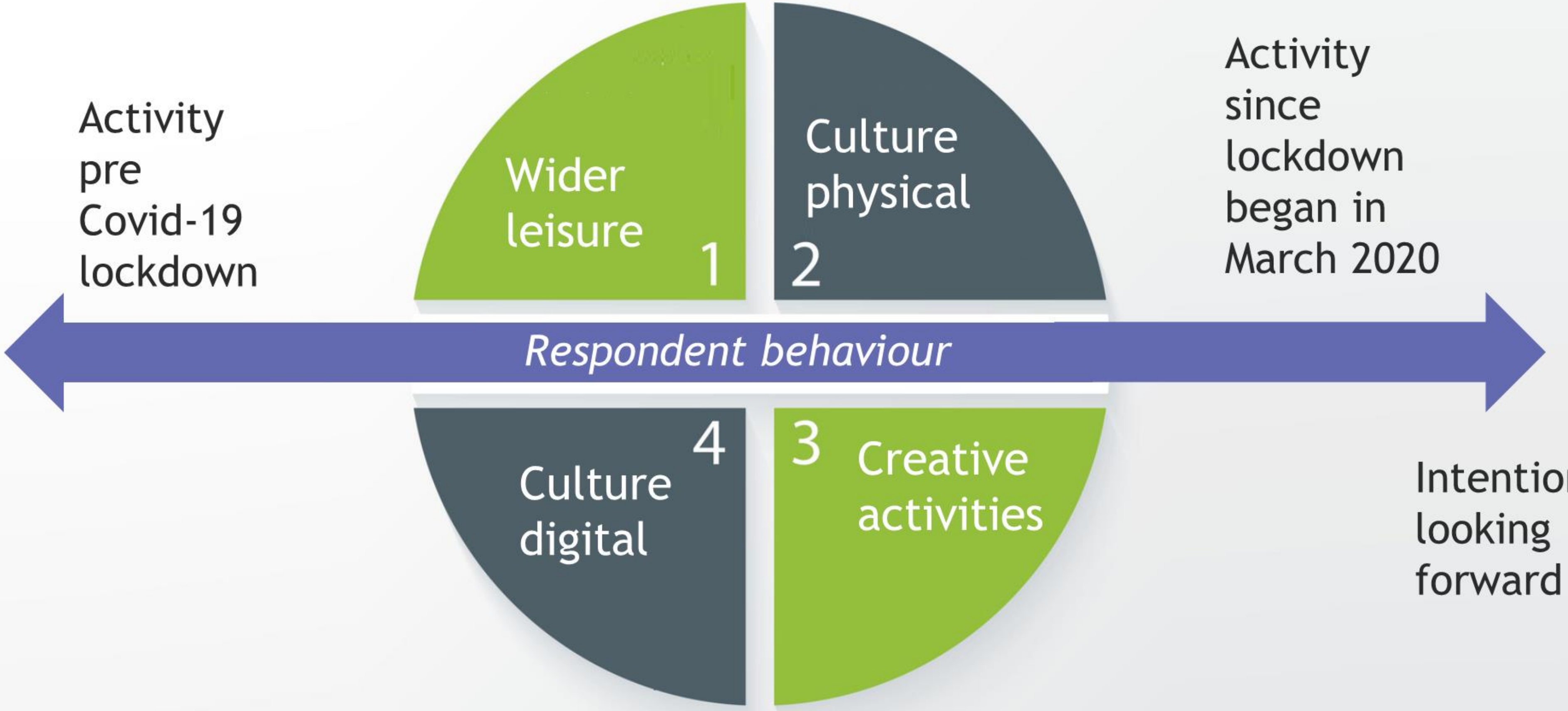
For:

- Pre-COVID baselines
- During COVID / lockdowns
- Future intentions to engage (inc. attitudes re mitigations).

For overall findings and non-digital topics, see the COVID-19 Cultural Participation Monitor Summary Report

About the Participation Monitor

i.e.:



About This Report

This report focused on the digital engagement questions from the first wave of the survey.

It covers both use of digital services during and after COVID, and wider digital behaviours.

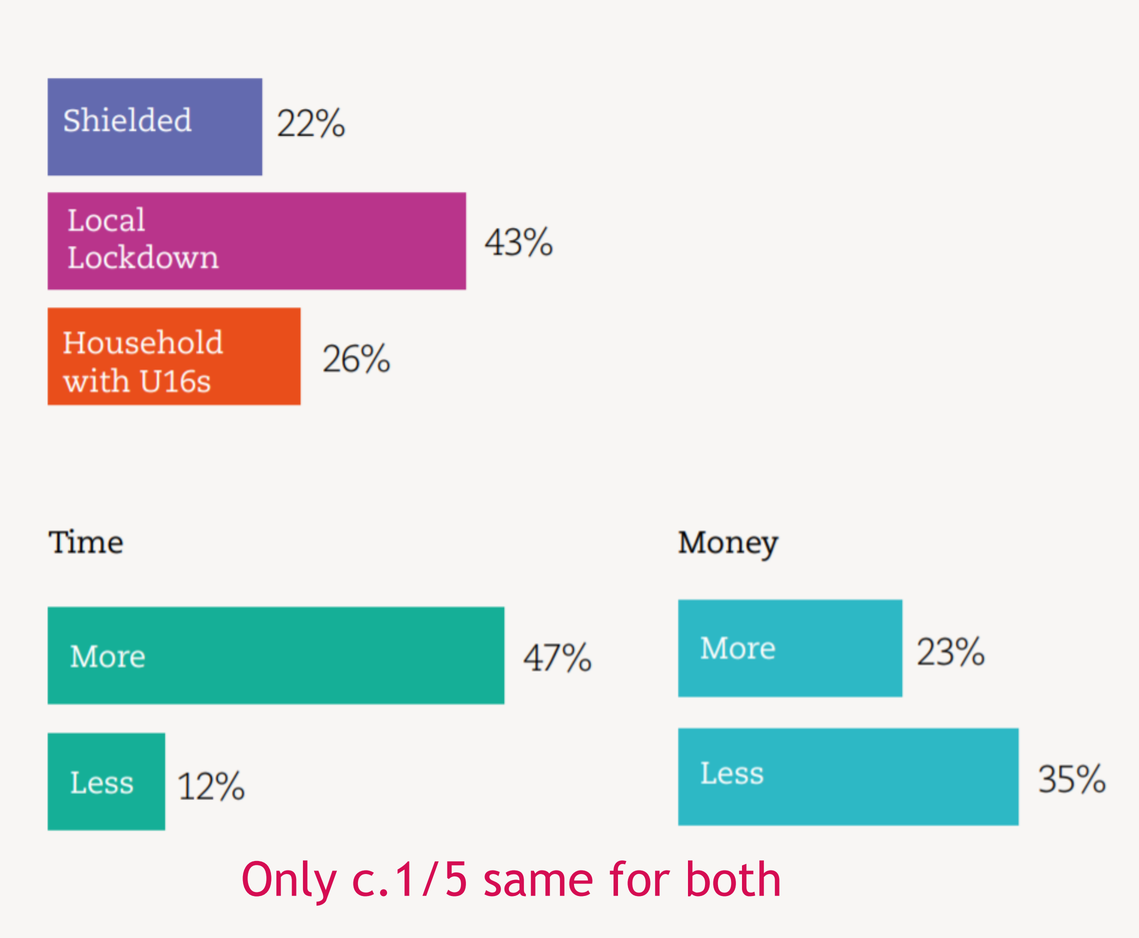
The survey covers the whole population meaning that these findings provide a wider view than – and helpful context for – research focused on current users (e.g. our Digital Audiences Survey).

Context: Covid Experiences

COVID-19 has had big impacts across the population, but importantly, these are very varied.

Nearly 80% have seen some change in the amount of time and/or money they have.

Many have shielded, had local lockdowns in addition to national ones, or have had under 16s in their household (which may include home schooling, for example).



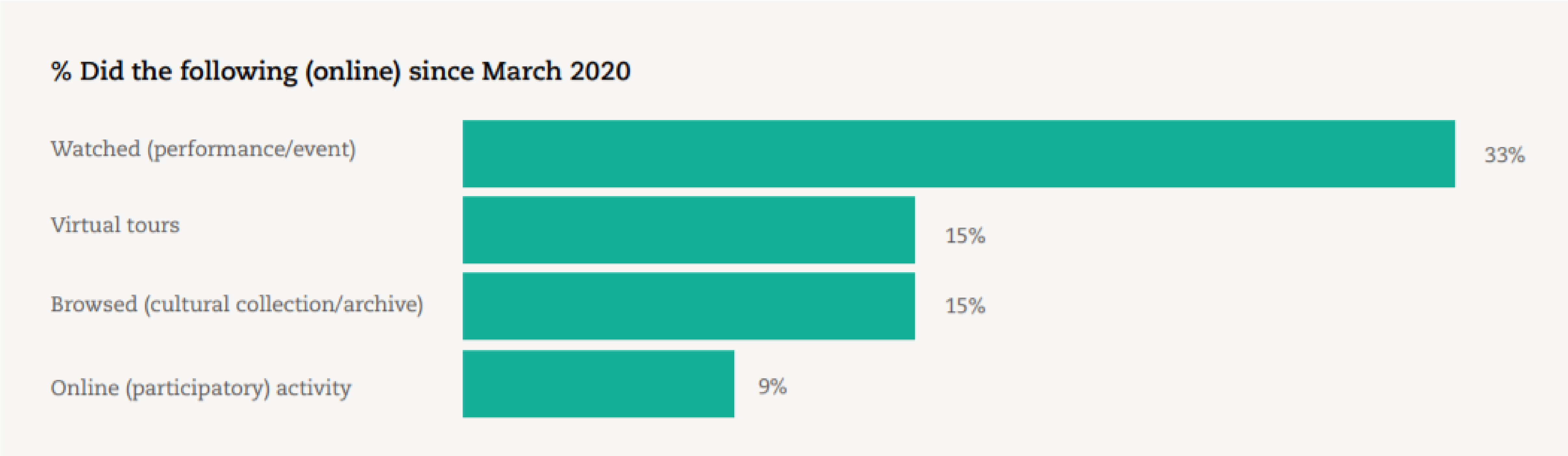
For more contextual information, inc. differences by segment, see the overall summary report

Digital Engagement During COVID

the audience agency

Digital Engagement

Digital arts engagement has been widespread: e.g. 1 in 3 watched online performances

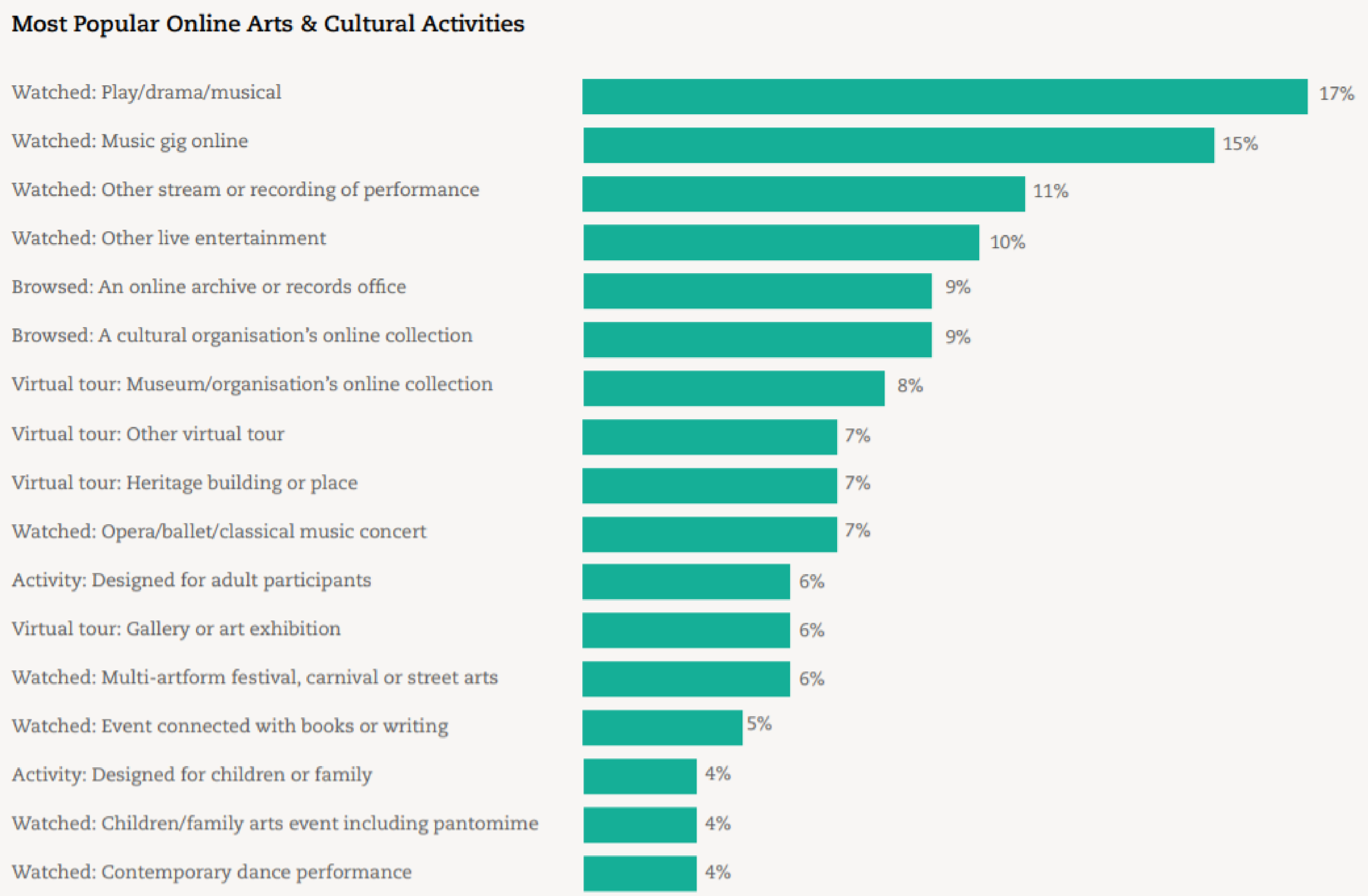


Digital Engagement

Types have varied, but the most popular activities are:

Watch play/drama /musical (17%)

Watch music (15%)



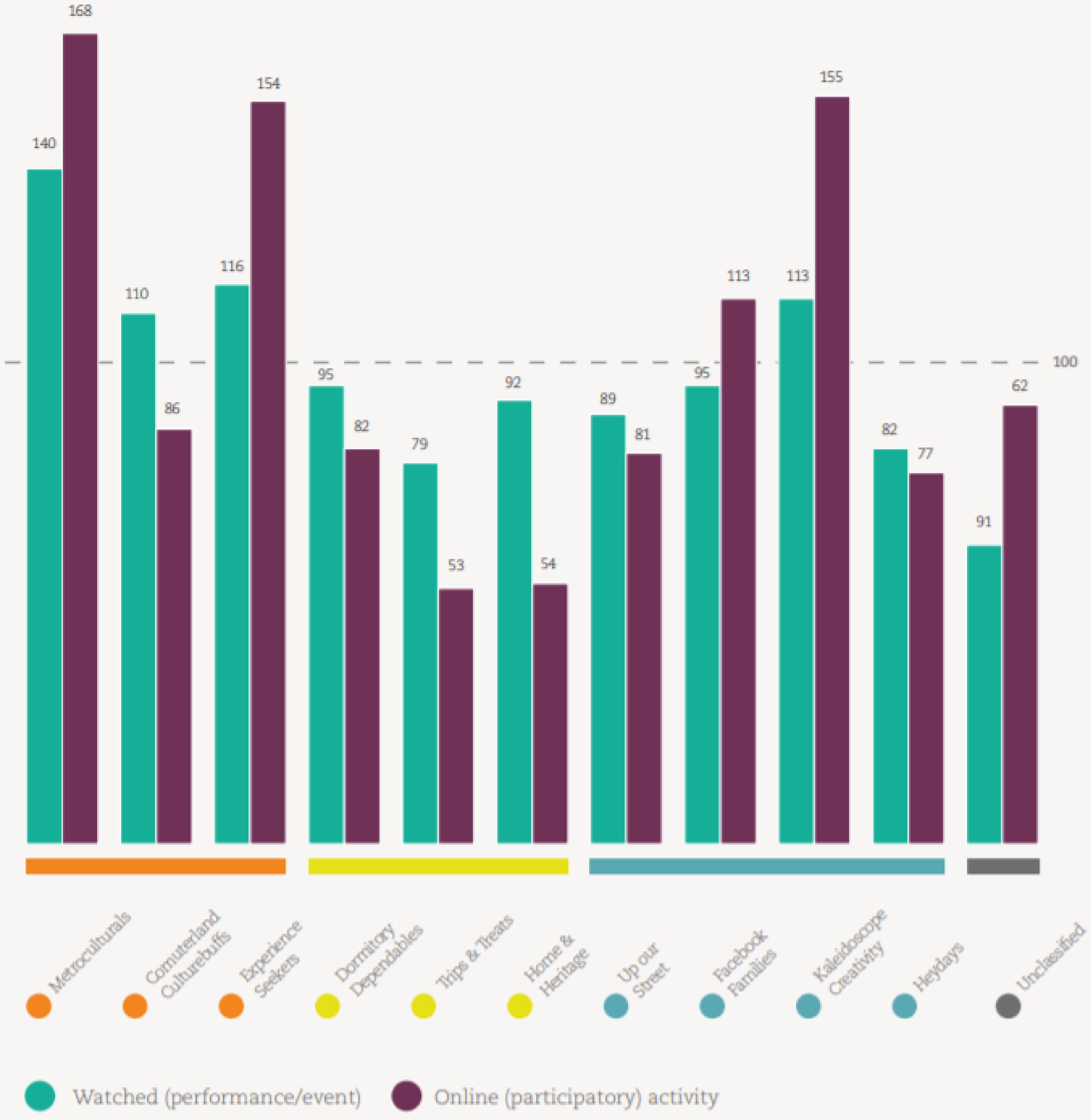
Engagement by Segment

This varies by audience type:

Metroculturals, Experience Seekers, Kalediscope Creativity are all high (esp. for participation)

Trips & Treats, Home & Heritage, Heydays are all low (Commuterland Culturebuffs are also low cf. in-person engagement).

For more about the Audience Spectrum segments, see https://www.theaudienceagency.org/off-the-shelf/audience-spectrum/profiles



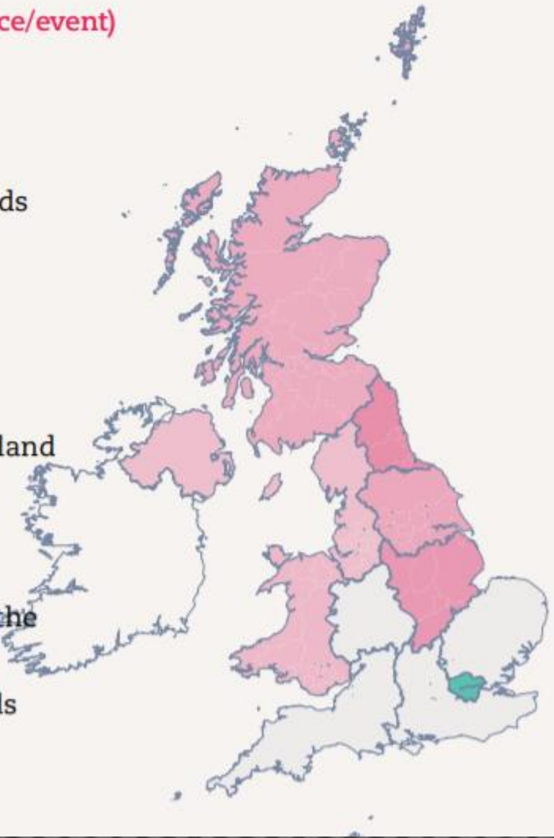
Engagement by Region/Nation

The regional picture shows particularly high engagement for both watching and participating online in London (and lowest online participation in Wales)

(Based on engagement since March 2020).

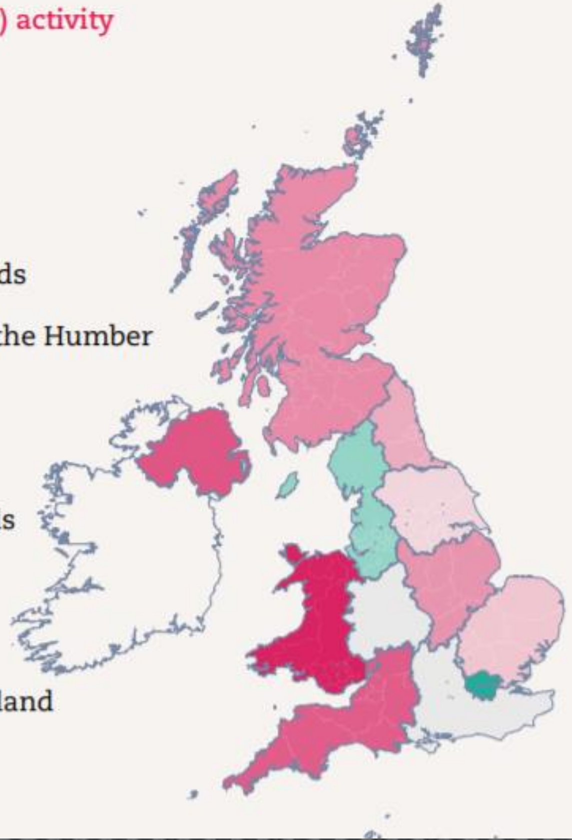
Watched (performance/event)

133	London
104	South East
104	West Midlands
101	East
99	South West
92	North West
92	Northern Ireland
91	Wales
89	Scotland
88	Yorkshire & the Humber
85	East Midlands
83	North East



Online (participatory) activity

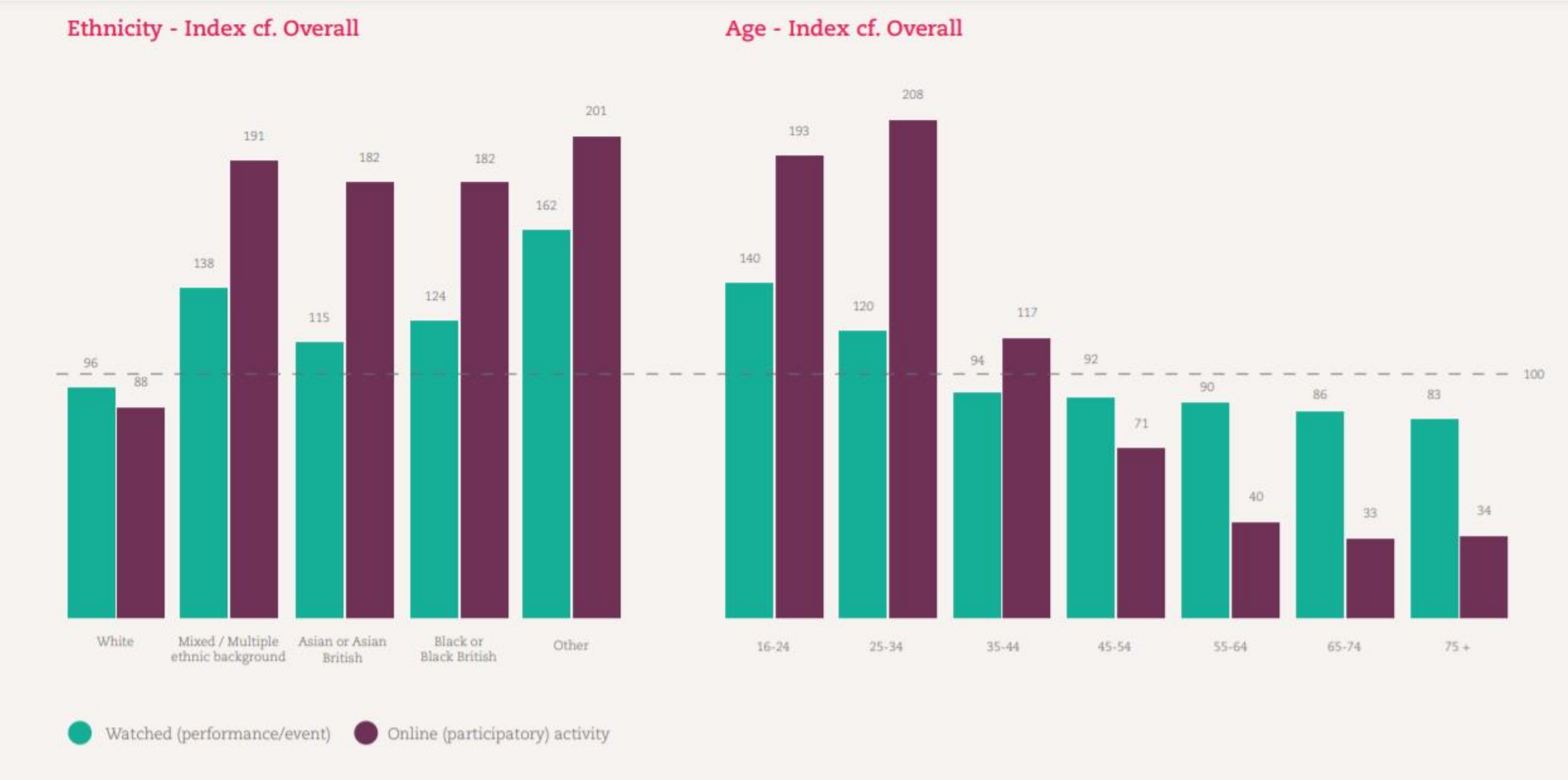
168	London
117	North West
101	South East
100	West Midlands
96	Yorkshire & the Humber
93	East
89	North East
84	East Midlands
72	Scotland
71	South West
67	Northern Ireland
47	Wales



Age & Ethnicity

Digital engagement was particularly higher for under 35s (under 45s for participation) and those from 'mixed', 'Asian', 'Black' or 'Other' ethnicities (i.e. all except 'White') – esp. for participation.

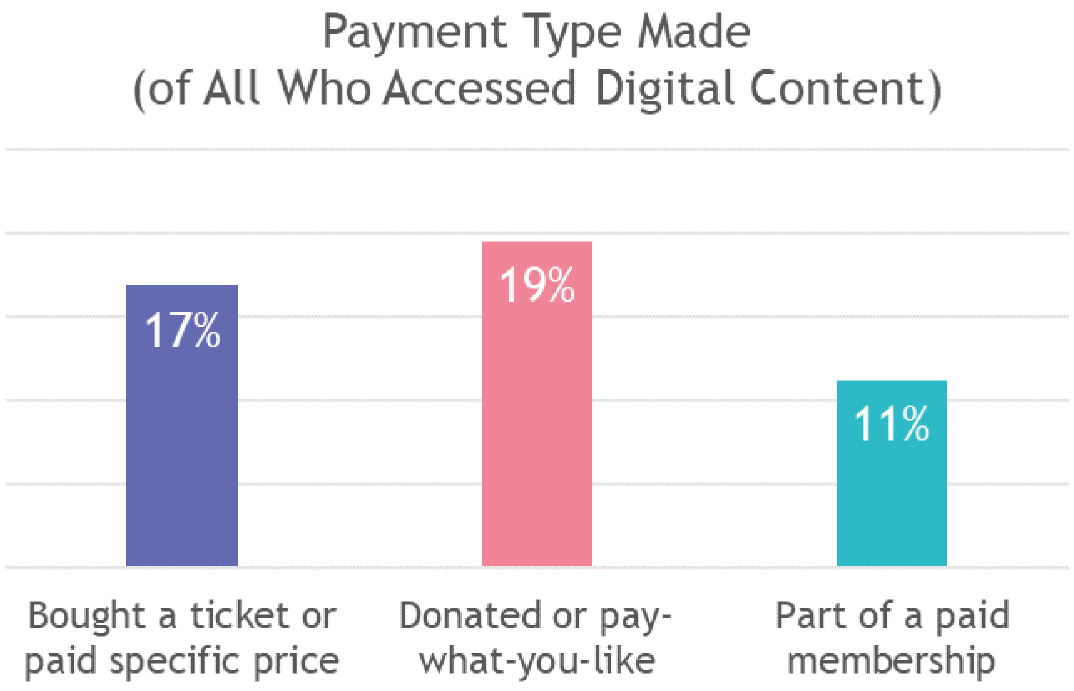
(Based on engagement since March 2020).



Online Payment

Around 2 in 5 of those who accessed digital content since March 2020 had paid in some form*: 1 in 5 had donated for it, and 1 in 6 bought a fixed price ticket.

Memberships were used by 1 in 9, but this was particularly higher for older groups…

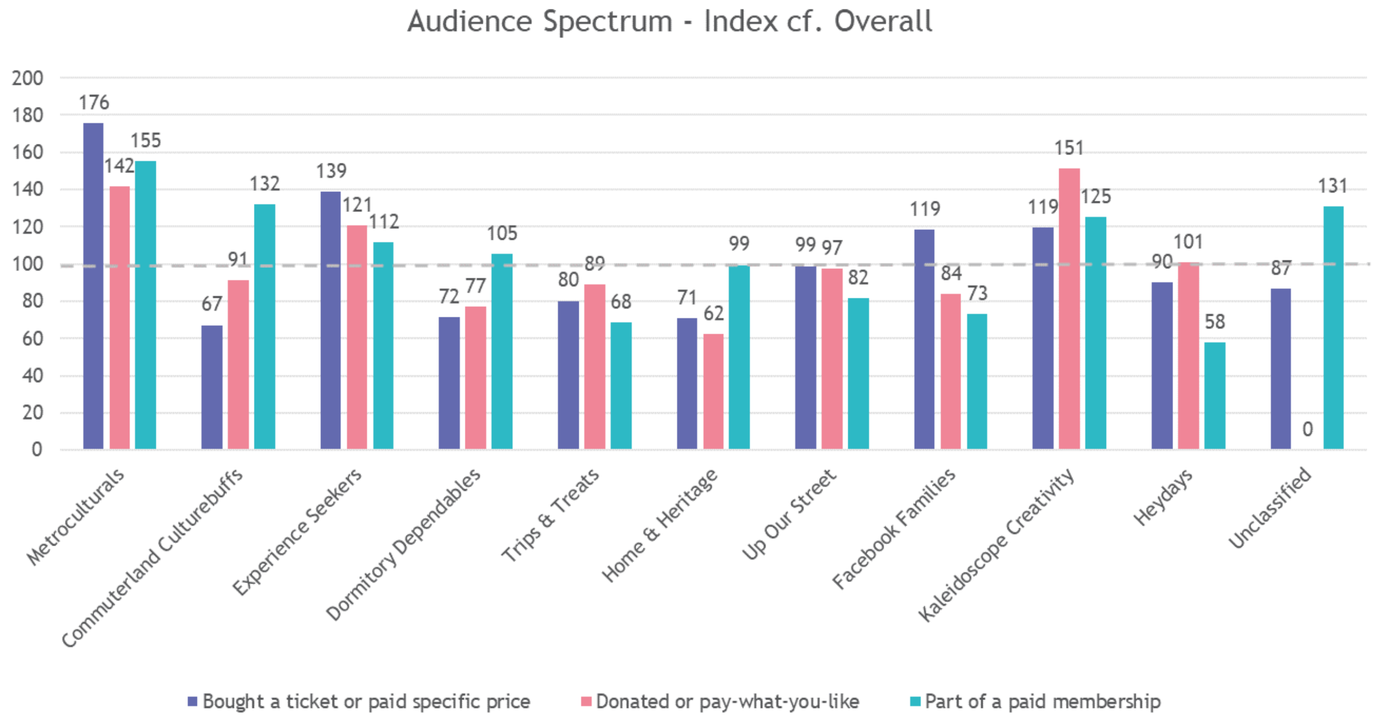


*When asked about whether they had paid for the arts/culture they had experienced online, 60% said ‘No, they were all free’, rather than selecting one or more of the payment options listed. This was highest for Home & Heritage (69%) and Dormitory Dependables (67%), in Northern Ireland, Scotland and Wales (76%, 73% and 70%) and older audiences (55-64, 75%; 65-74, 74%; 75+, 72%)

Online Payment

Metroculturals, Experience Seekers and Kaleidoscope Creativity were all more likely to have paid (the former two more likely for set price methods, the latter for donations).

Home & Heritage were average for memberships (and Commuterland Culturebuffs above average) despite being below average for other methods.



Changes in Digital Engagement:
Before / During / After COVID

the audience agency

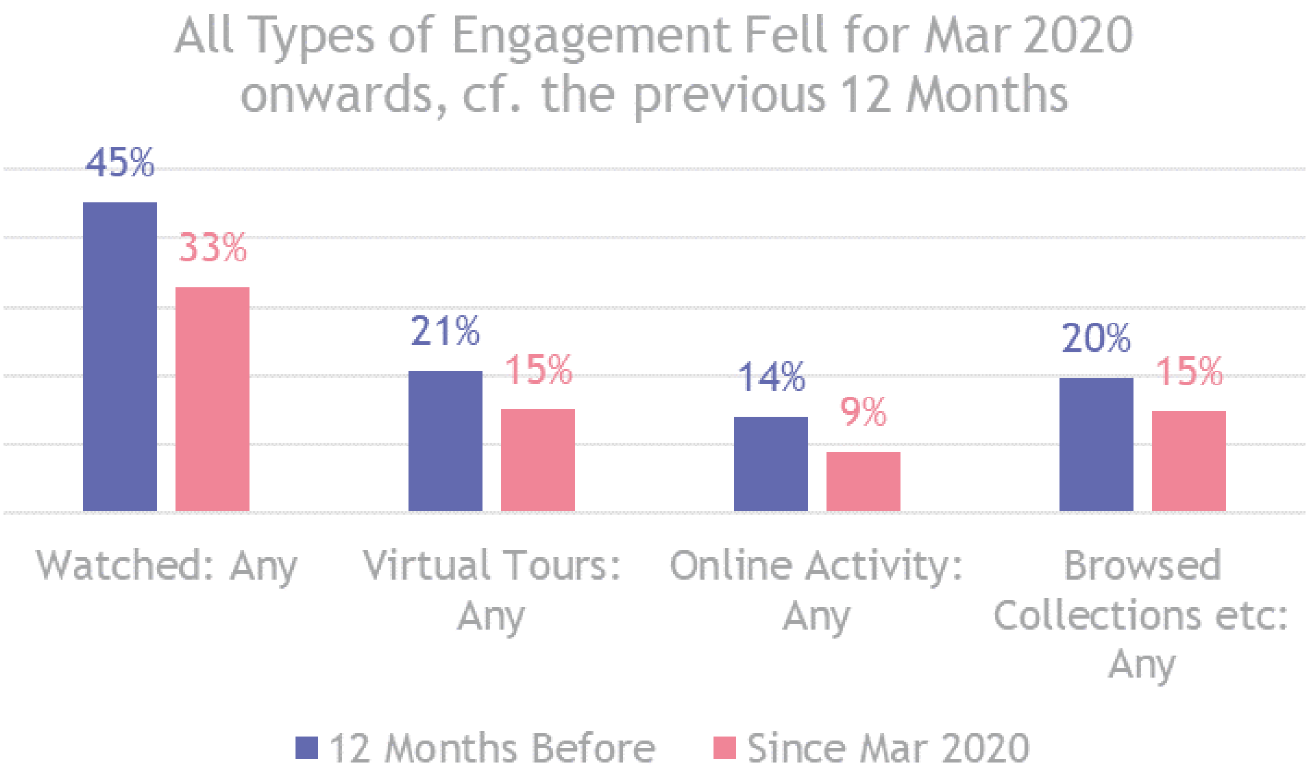
Change in Engagement

Digital engagement fell between the 12 months before lockdown and the period since March (but NB the shorter time frame):

-12% points for Watching [Any]

-5% points for each of virtual tours, online participatory activity and browsing collections [all: Any]

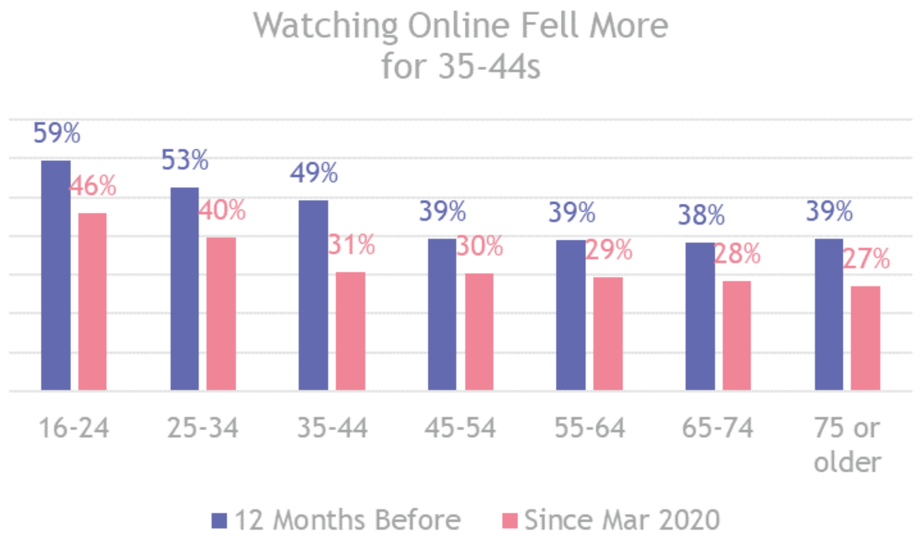
(as a proportion of audience: -27%, -27%, -37%, -25% respectively)

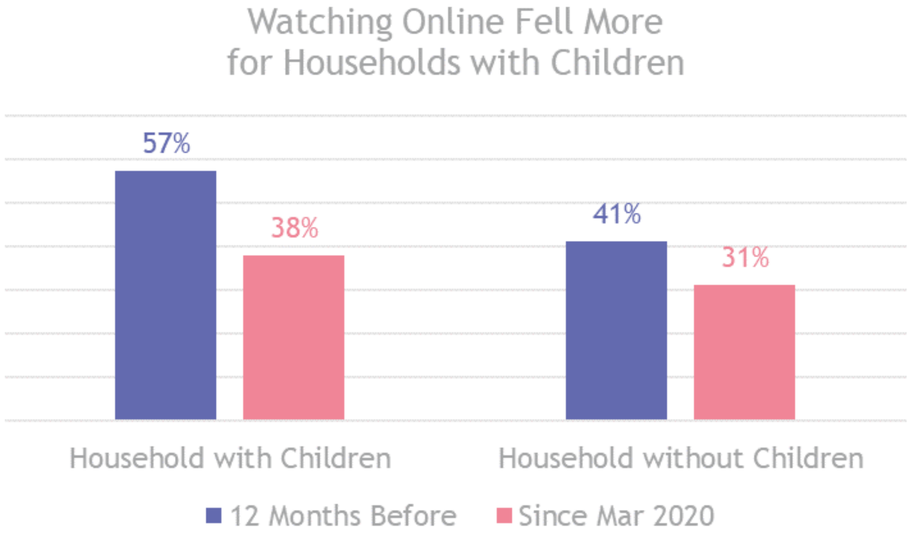


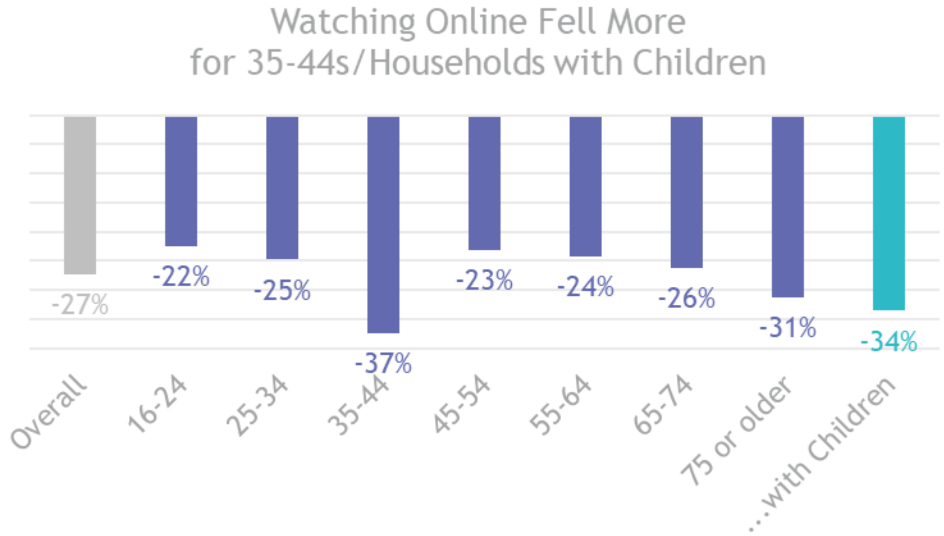
the audience agency

Change in Engagement

Notably, it fell different amounts for different groups:

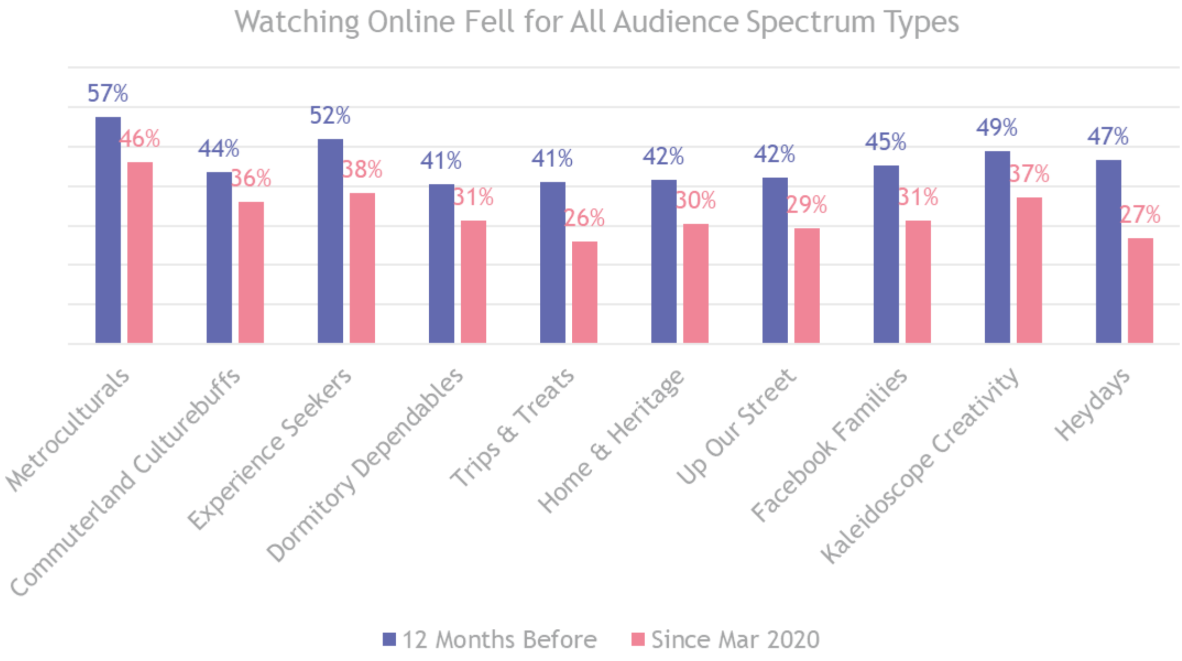


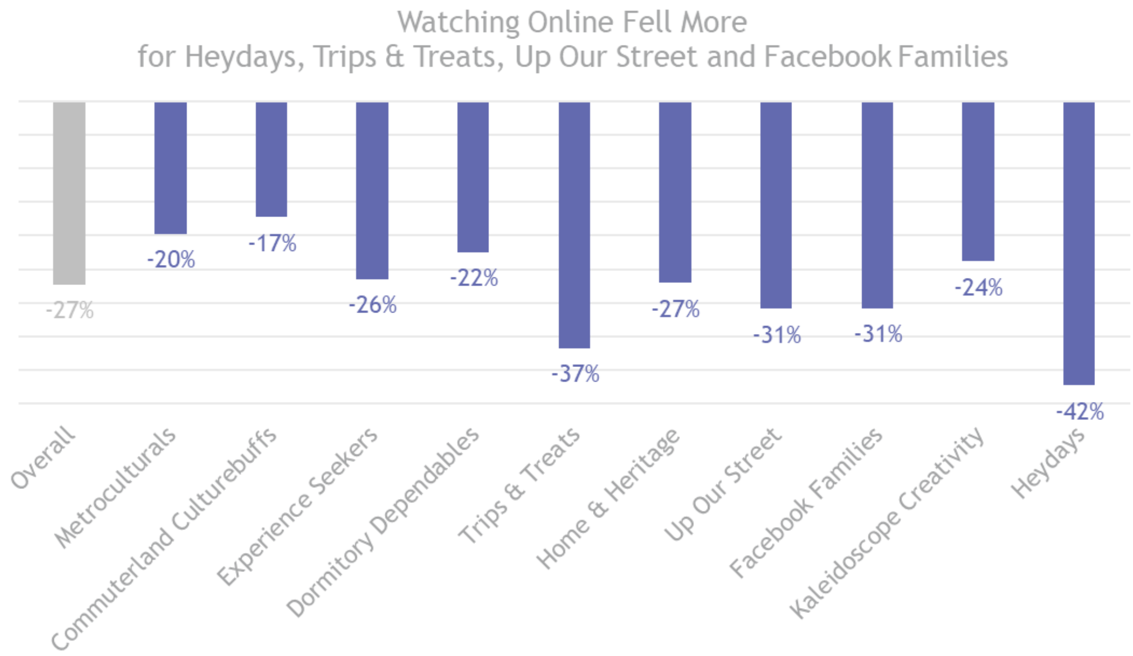




Change in Engagement

Notably, it fell different amounts for different groups:

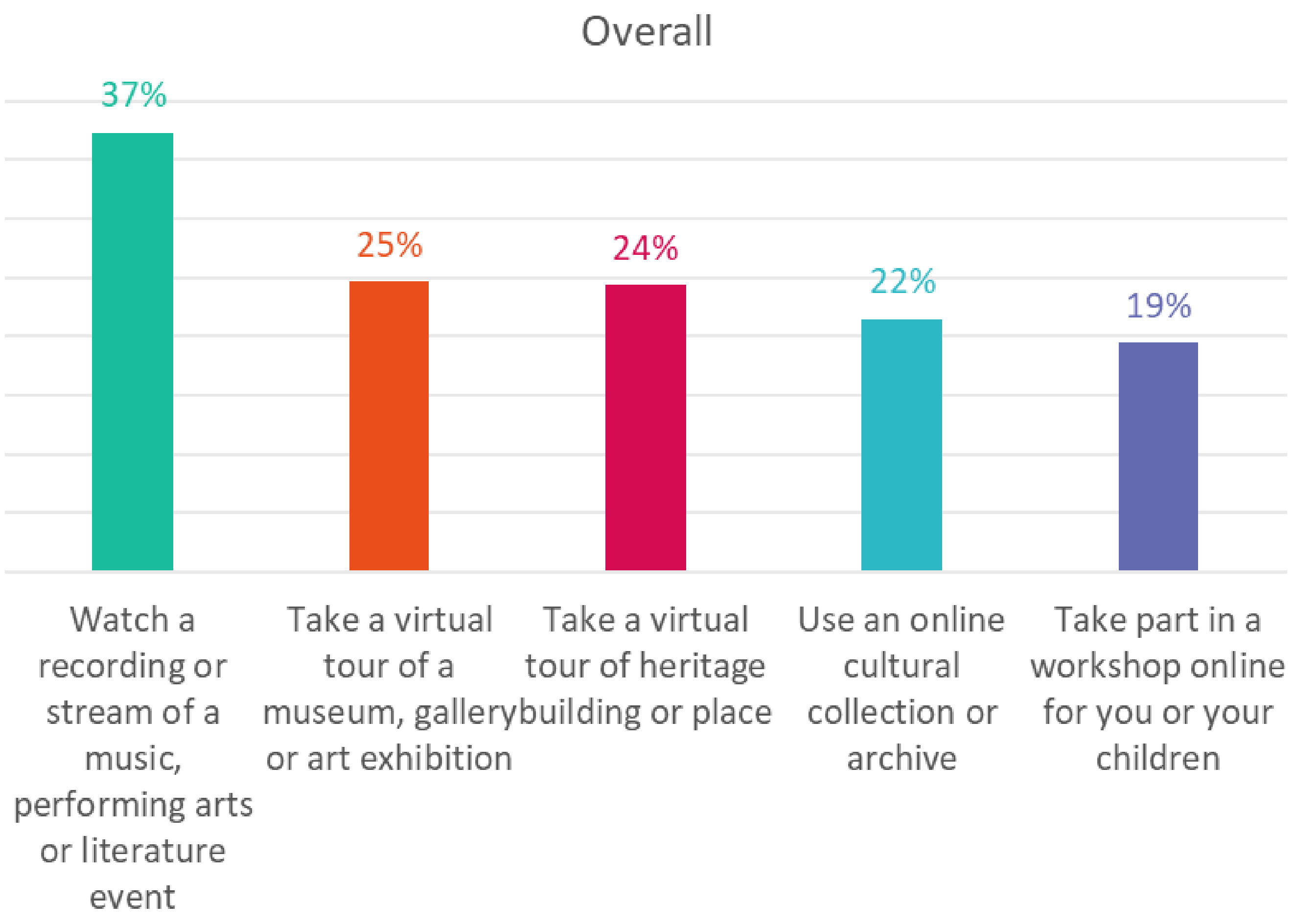




Future Engagement

Future engagement after COVID is expected to hold up: e.g. 37% say they will watch content in future cf. 33% who have so far.

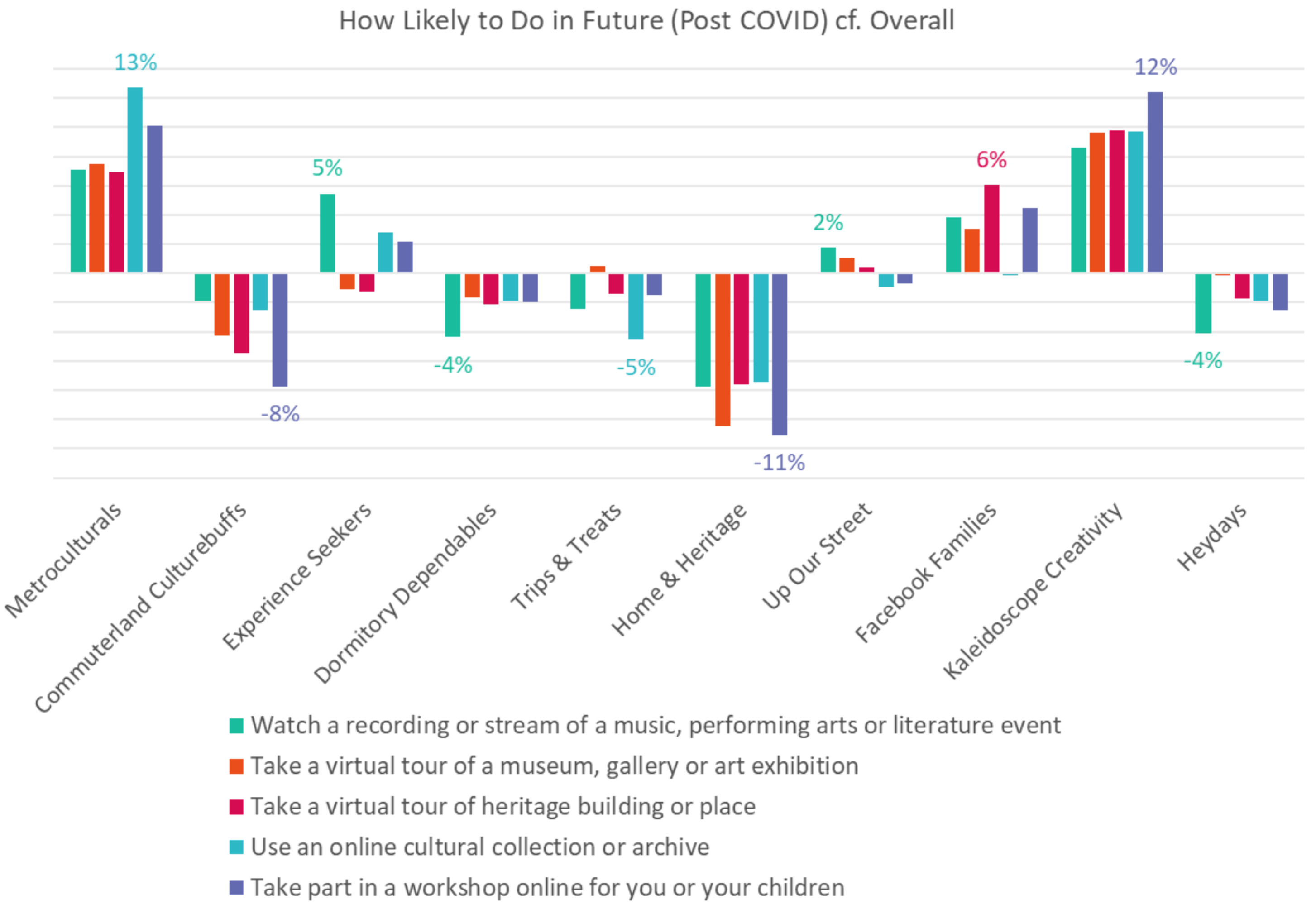
But expectations vary by segment…



Future Engagement by Segment

Metrocultural and Kaleidoscope Creativity have more appetite, cf. the overall average (figures show % point difference by segment).

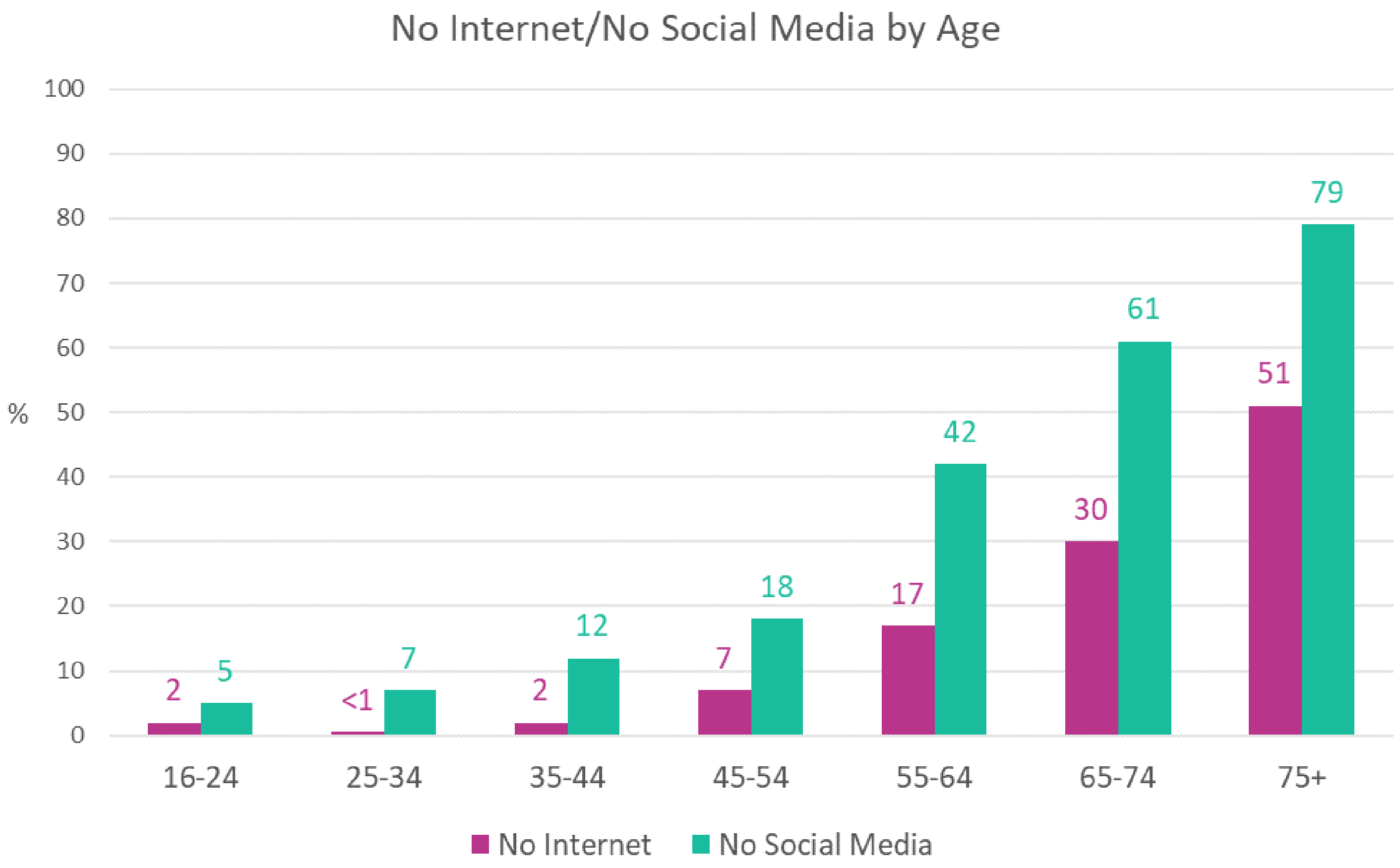
Home & Heritage and Commuterland Culturebuffs are particularly less likely to expect to engage online, esp. around participatory activity.



Access to the Internet:
Who and How

the audience agency

Non-Users of Internet / Social Media by Age

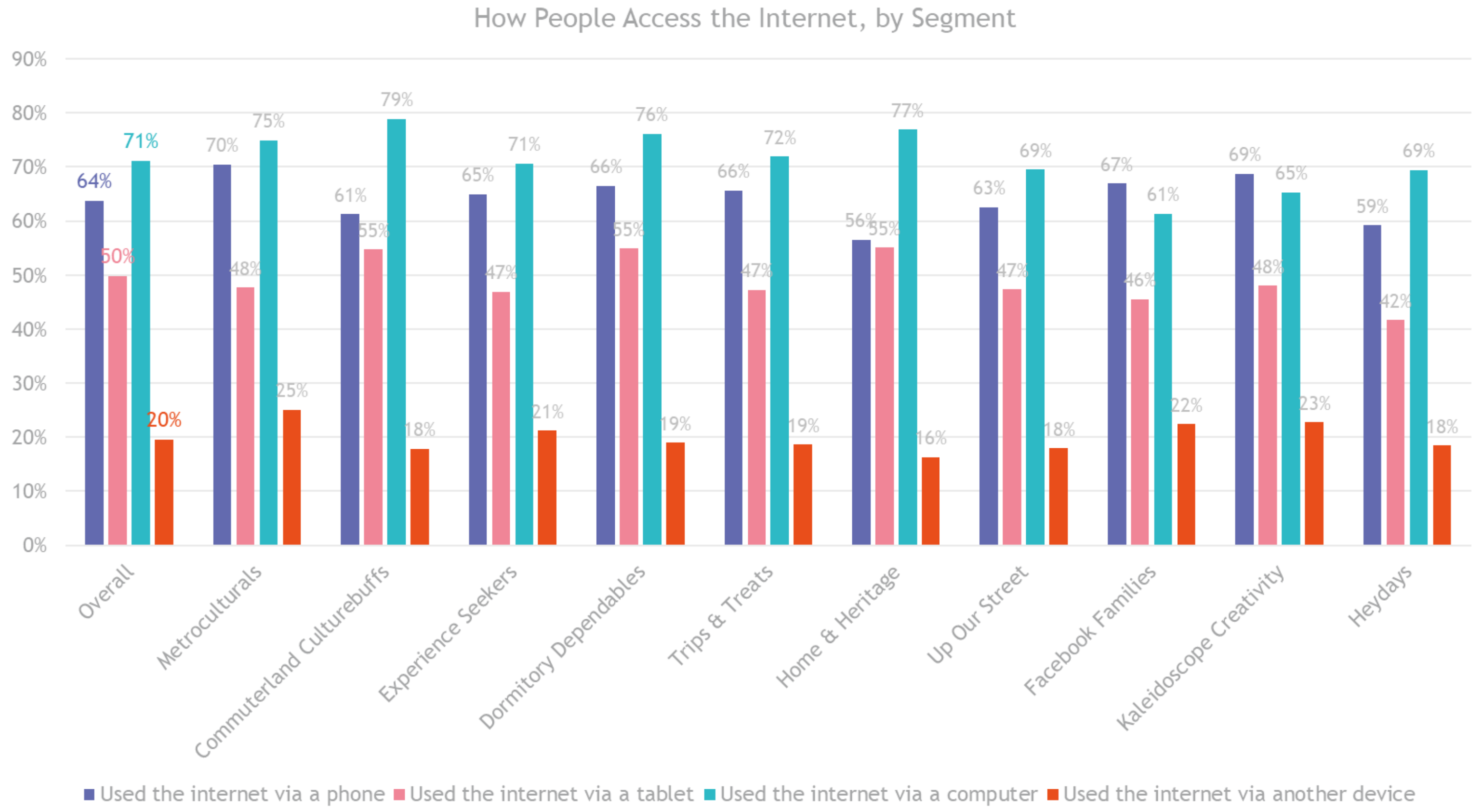


For all groups below retirement age, over 80% have internet and a clear majority use social media (over 80% of all groups under 55 use social media, as well).

NB the difference in results from later social media use figures [e.g. 79% of over 75s with no social media cf. 52%] is likely due to a narrower definition here (e.g. the exclusion of WhatsApp, Messenger and YouTube etc, and focusing more on Facebook, Twitter etc).

the audience agency

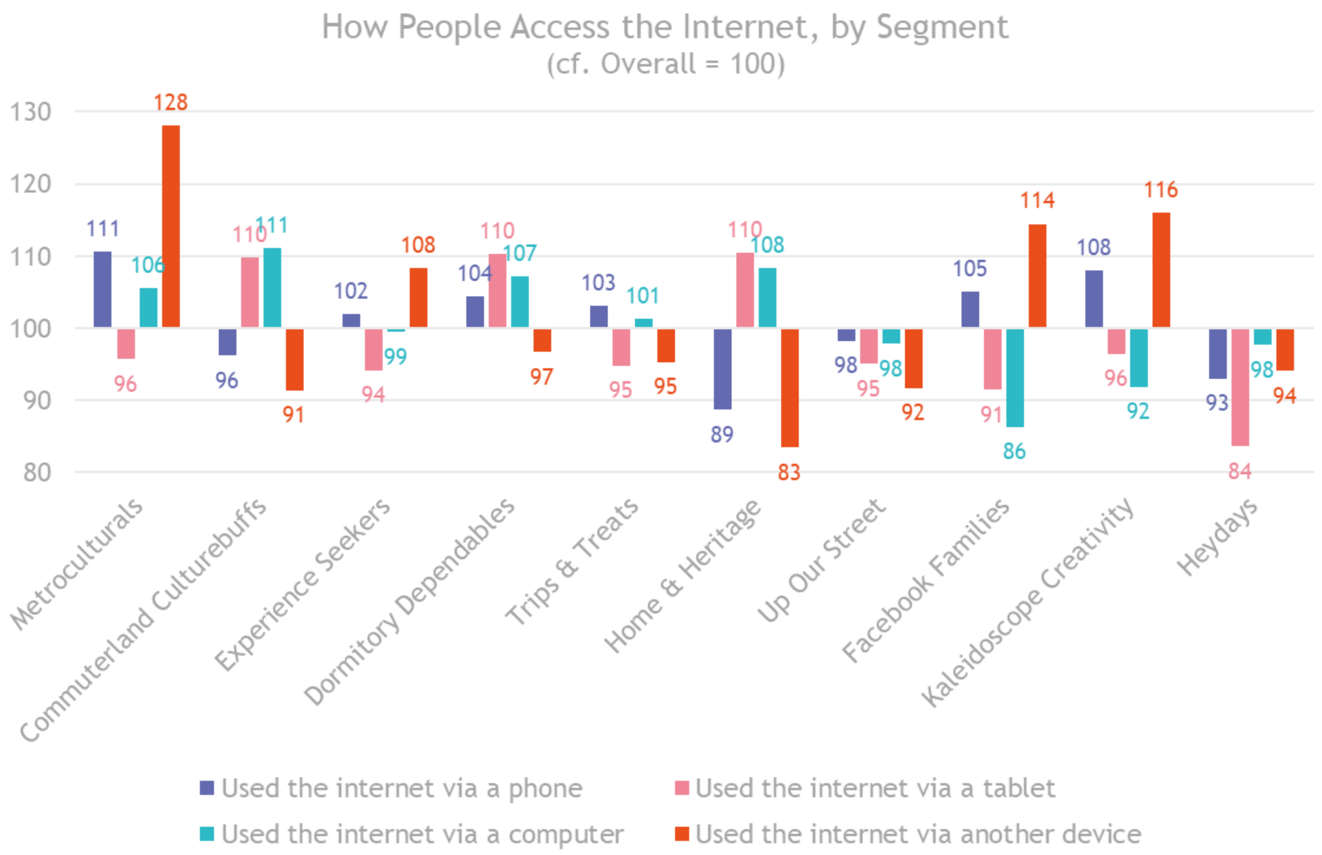
How Segments Access the Internet



A higher proportion of almost all segments access the internet via computer, followed by phone (Facebook Families and Kaleidoscope Creativity are the other way around), but with levels similar in most cases.

The biggest gap is for Home & Heritage and Commuterland Culturebuffs, although these groups are also most likely to go online via tablets.

How Segments Access the Internet



Three segments are more likely to access the internet via tablets and computers (and less by phone and other devices*): Commuterland Culturebuffs, Dormitory Dependables and Home & Heritage. The opposite is largely the case for Metroculturals, Experience Seekers, Facebook Families and Kaleidoscope Creativity. Heydays and Up Our Street are below average for all methods, Trips & Treats close to average for all.

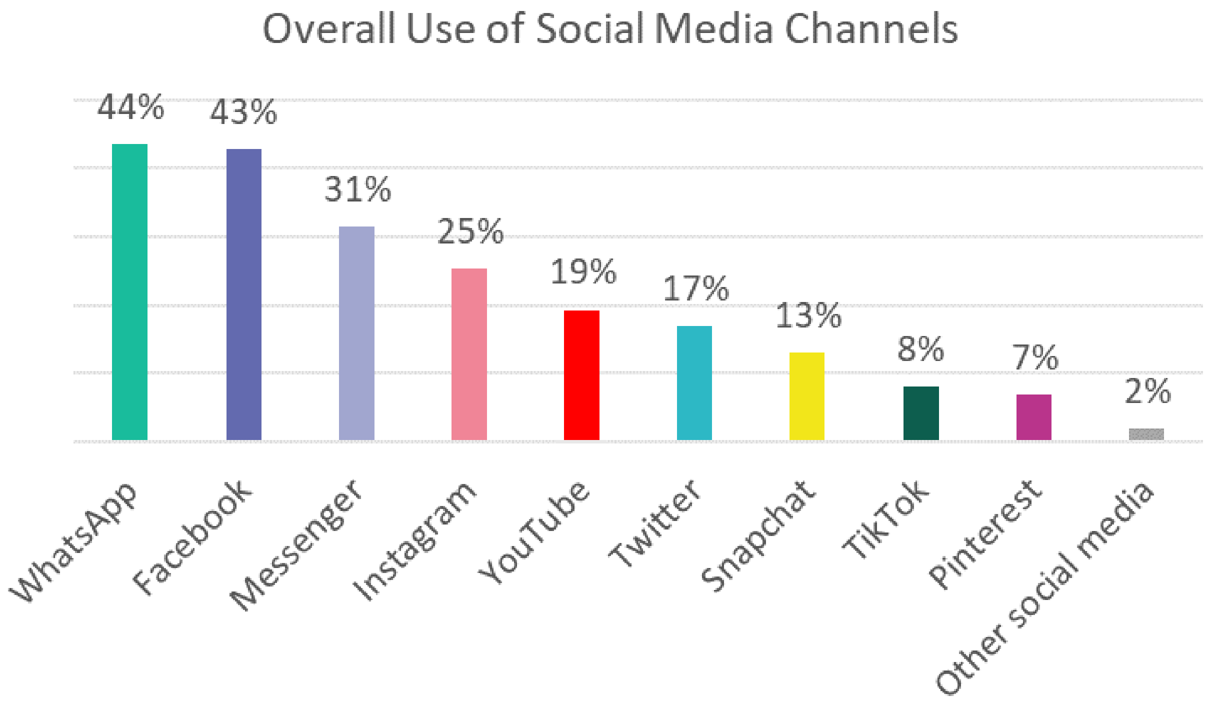
*These could include games consoles, smart speakers, smart watch and more.

Use of Digital Technologies:
Social Media

Social Media Use

We asked about overall social media use (using a relatively stringent criterion: both *regular contribution of content* and *not for work*).

Beyond the headline figures, we could see how engagement varied by segment and age…

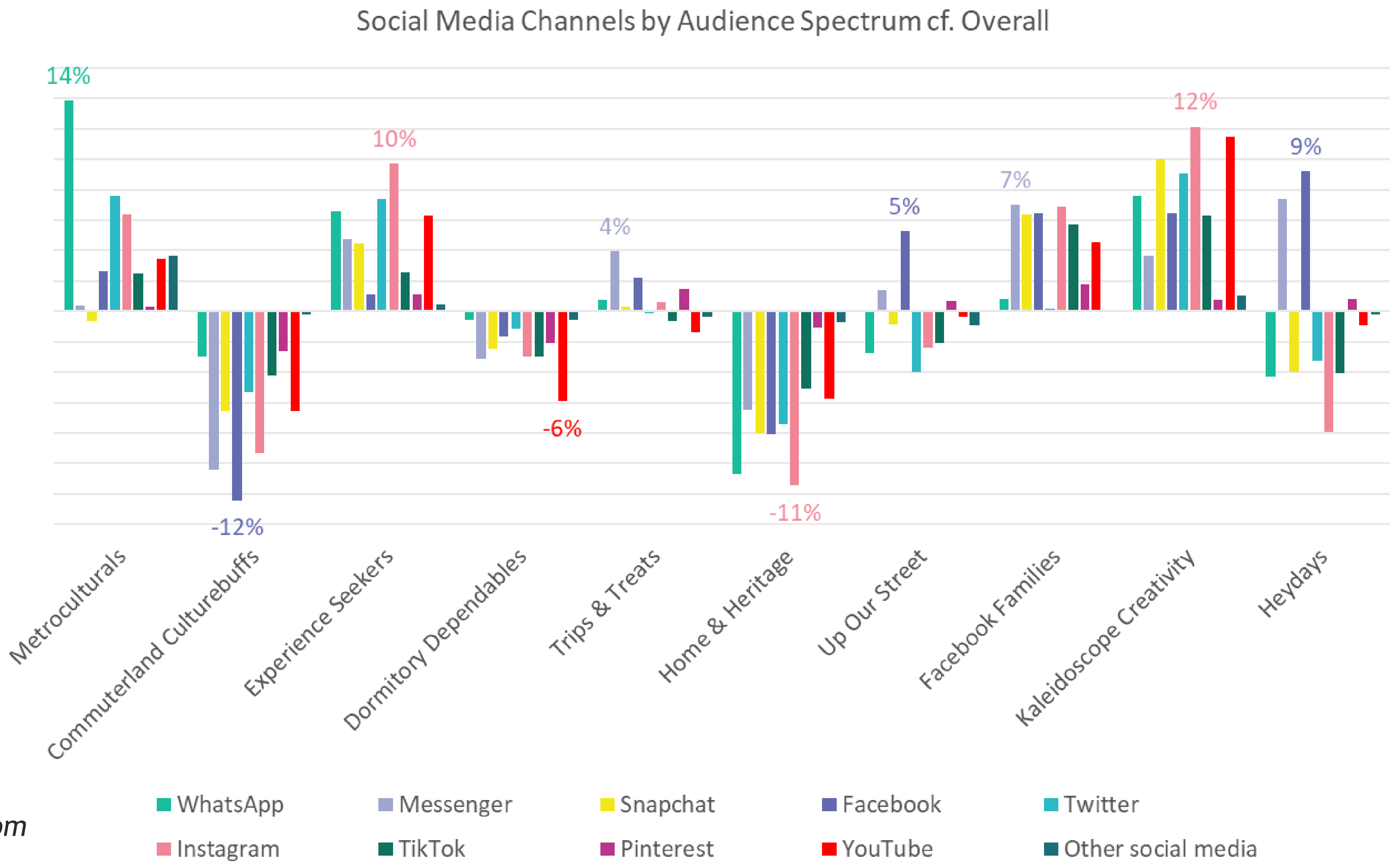


Q: Do you regularly post or upload onto any of the following (NOT for work)?

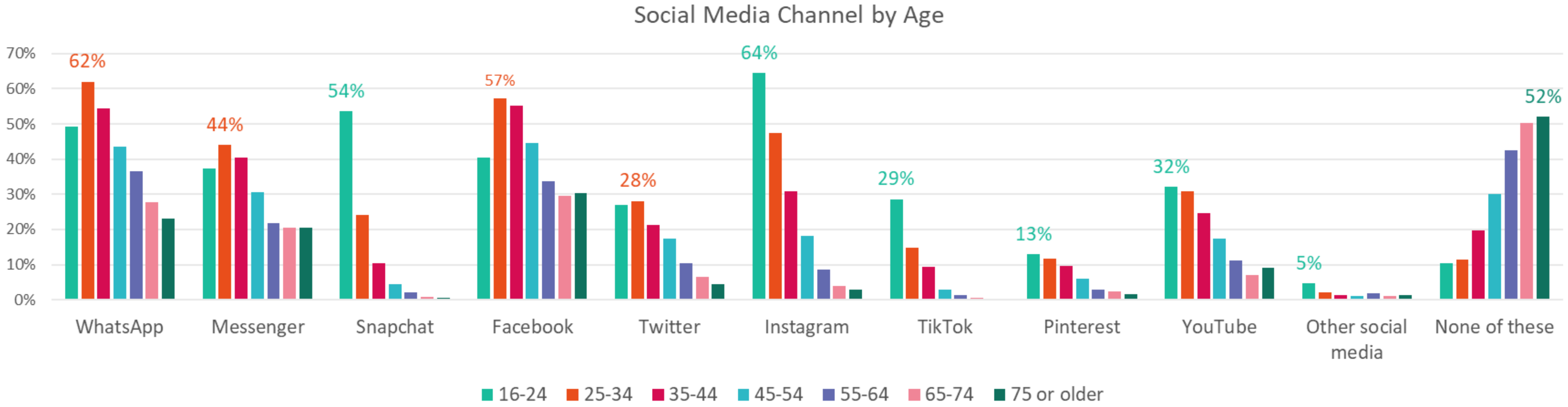
Social Media by Audience Spectrum

Different segments had very different usage (e.g. Metroculturals and Whatsapp; Experience Seekers and Instagram; Up Our Street, Trips & Treats and Heydays above average for Facebook & Messenger)

NB: This chart shows the difference from the average by segment in % points



Social Media by Age



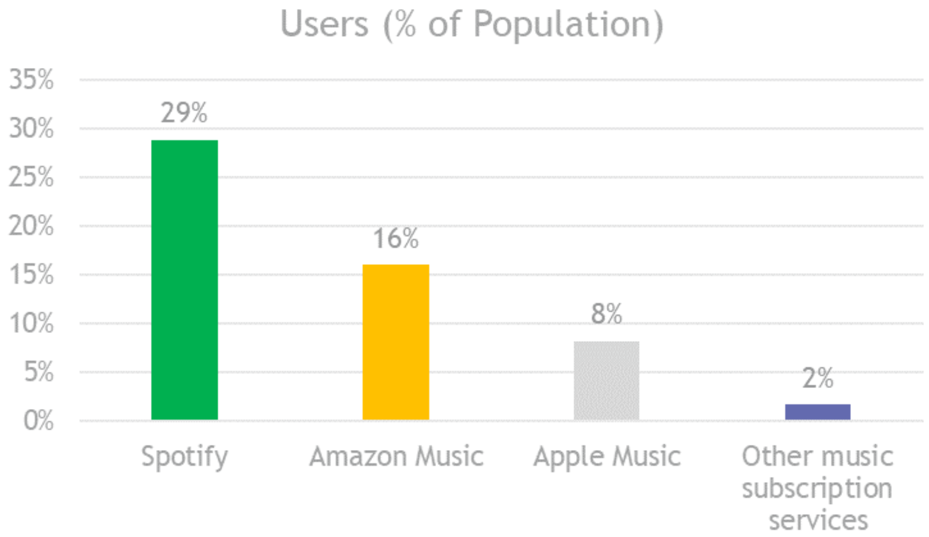
Younger groups tended to have higher engagement for each channel (although WhatsApp, Messenger, Facebook and Twitter were most popular with 25-34s). Snapchat and TikTok were particularly the preserve of the 16-24s, with double the proportion than 25-34s). All age-groups below 65, however, had a majority who used at least one of these platforms (with Facebook the most popular for older groups).

Use of Digital Technologies:
Music Streaming

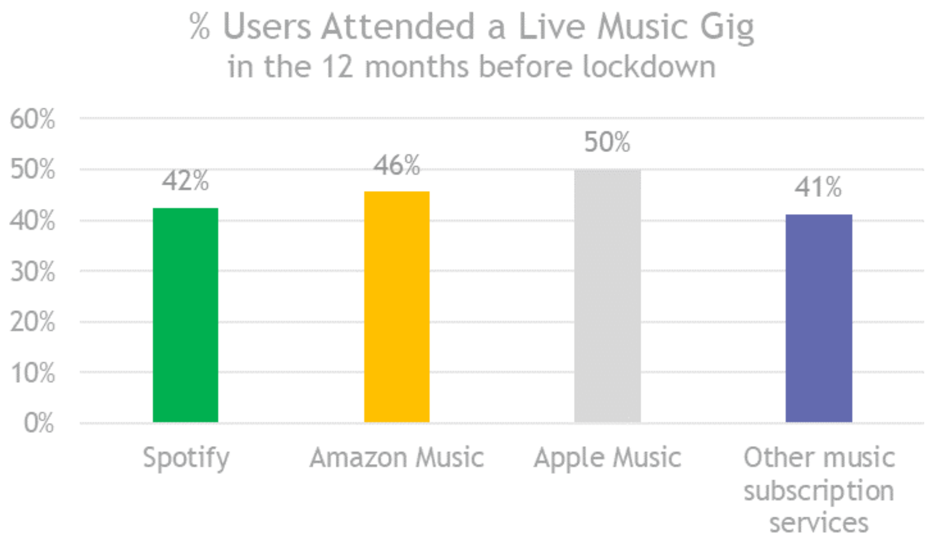
the audience agency

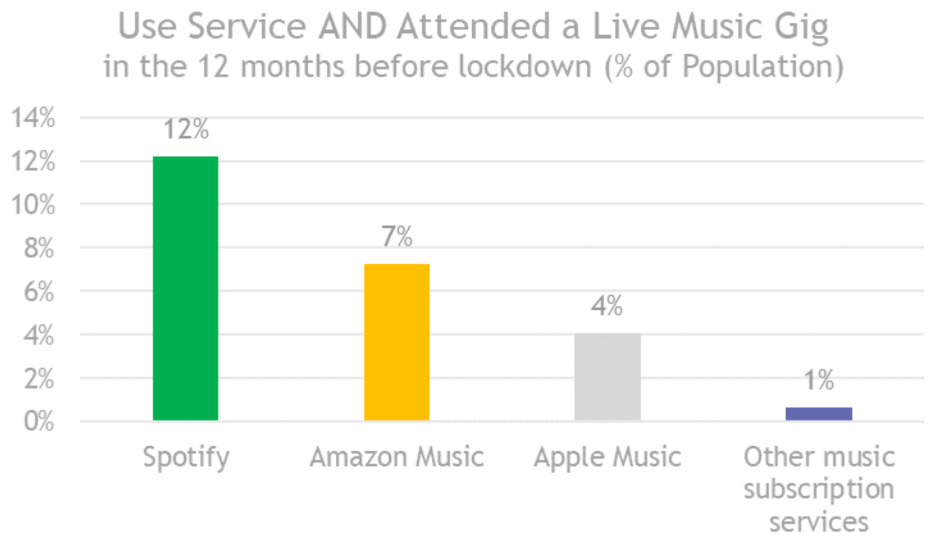
Music Streaming (and Live Music)

Almost 1 in 3 use Spotify, 1 in 6 Amazon Music and 1 in 12 Apple Music. Apple Music users are most *likely* to attend live music, but there are far *more* Spotify user live music attenders.



Q: 'Which, if any, of the following services do you use currently…?'



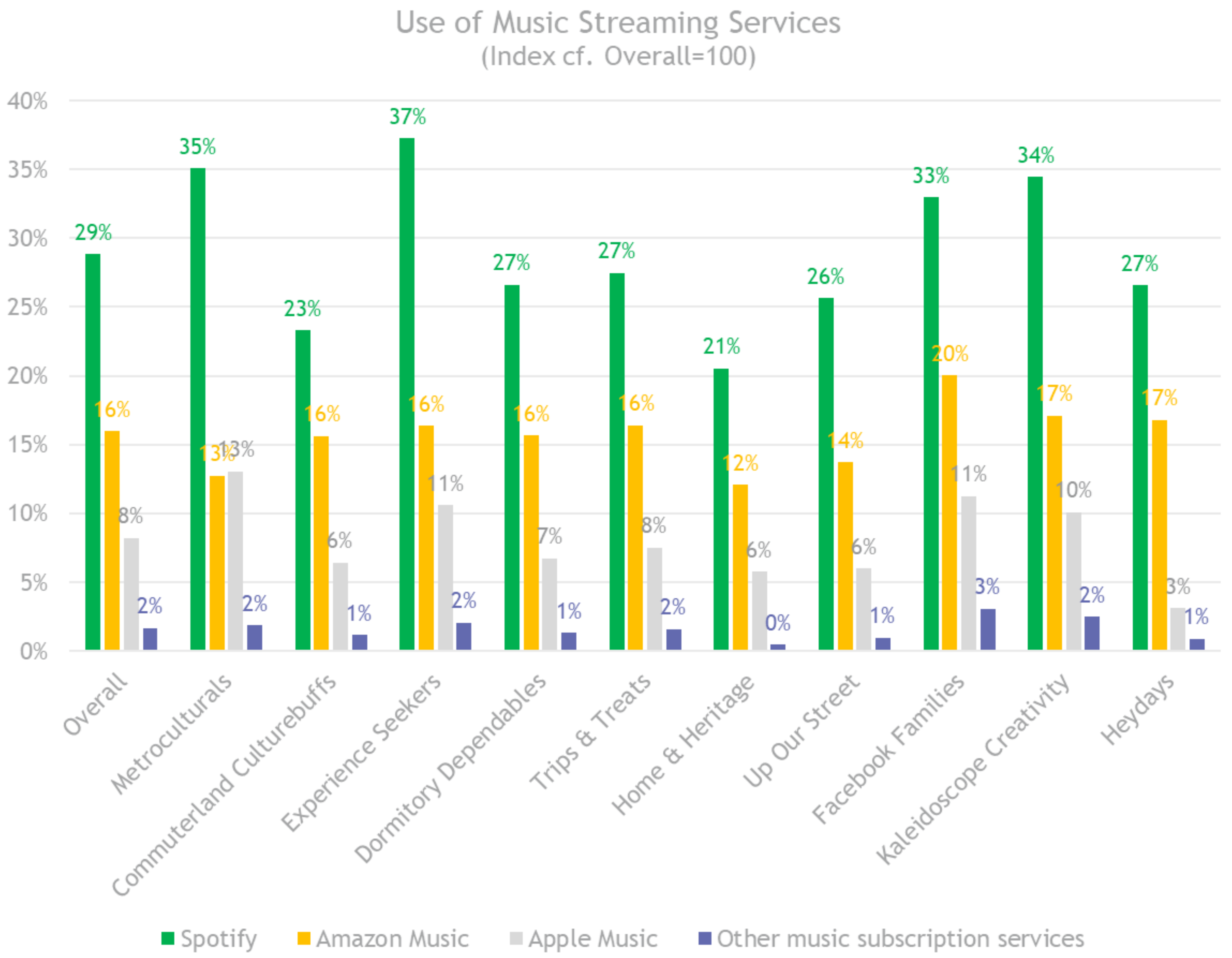


the audience agency

Music Streaming by Segment

All segments were most likely to use Spotify, followed by Amazon, Apple Music, then other services: except Metroculturals (as likely to use Apple Music as Amazon Music: 13%).

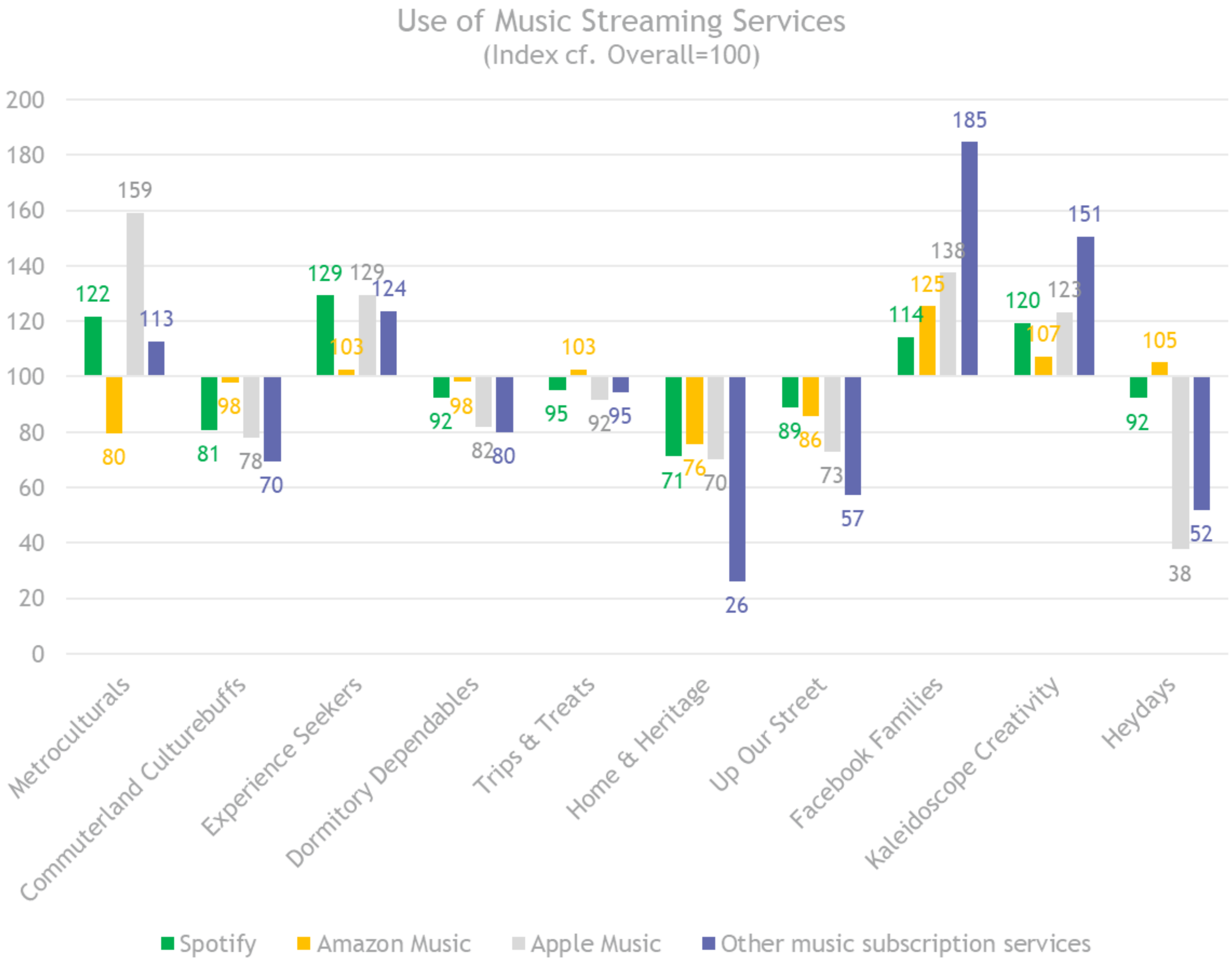
For the other two services, the highest segments are 37% of Experience Seekers using Spotify and 20% of Facebook Families using Amazon Music.



Music Streaming by Segment

Metroculturals, Experience Seekers, Facebook Families and Kaleidoscope Creativity were more likely to use all services (except for Metroculturals and Amazon Music).

Metroculturals were more likely to use Apple Music, Experience Seekers Apple Music and Spotify and the other two segments other services.



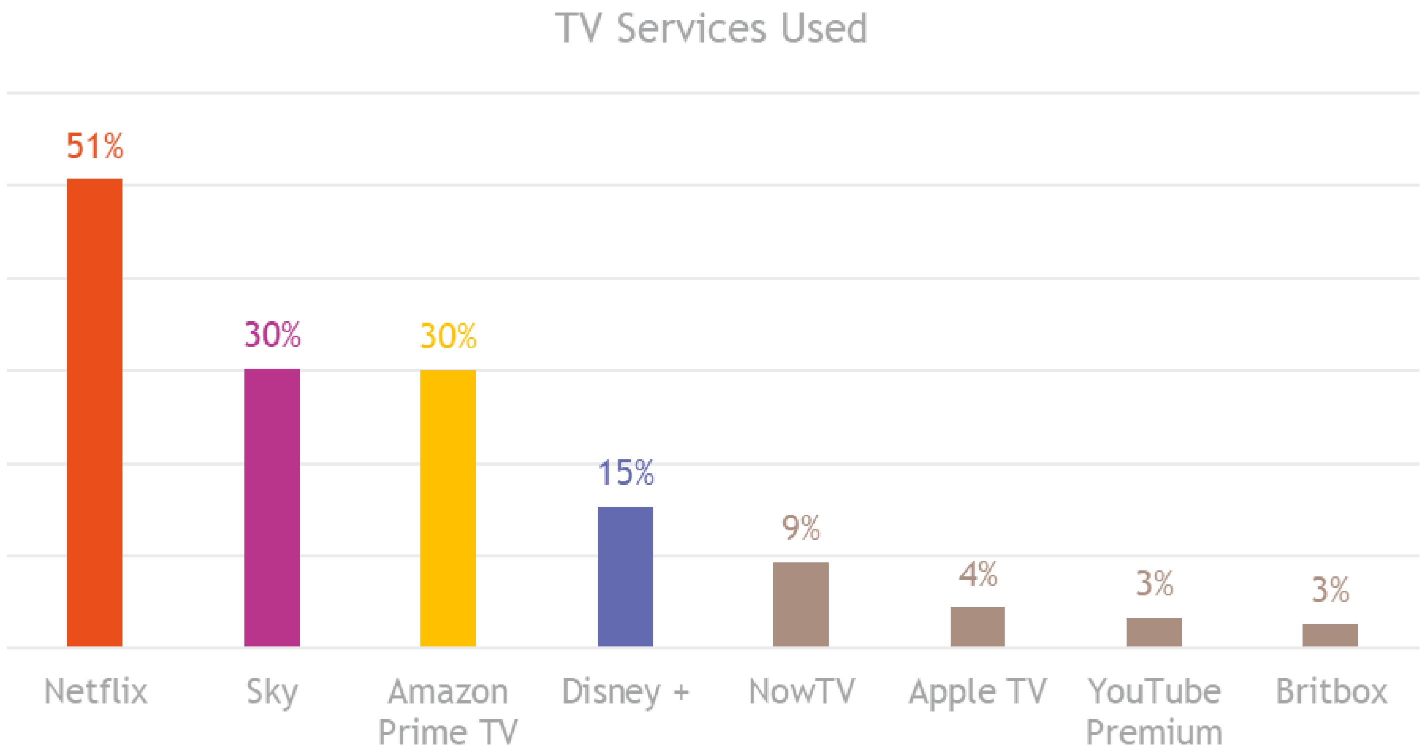
Use of Digital Technologies:
TV Streaming

the audience agency

TV Streaming

Netflix is used by just over half of the population, Sky and Amazon Prime by just under a third.

Disney + is used by 15%, despite having only launched seven months earlier (in late March).



Q: 'Which, if any, of the following services do you use currently…?'

TV Streaming

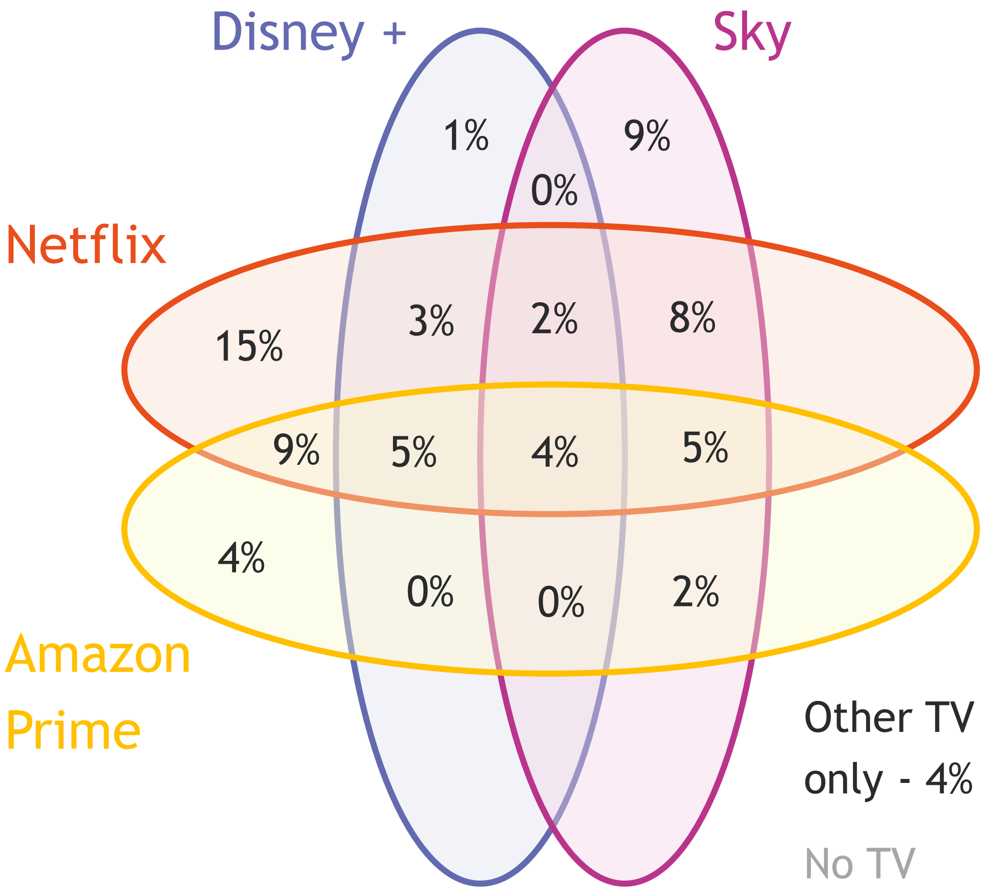
Netflix is the service with most unique users* (15%), followed by Sky (9%).

There is a lot of overlap between use of TV services: only 29% only used one of the main four, 22% used two; 12% three; 4% all four.

29% of Neflix and Sky's users only used that service, compared to 15% of Amazon Prime and only 5% of Disney +.

29% didn't use any TV services.

*out of the four main services shown (r)



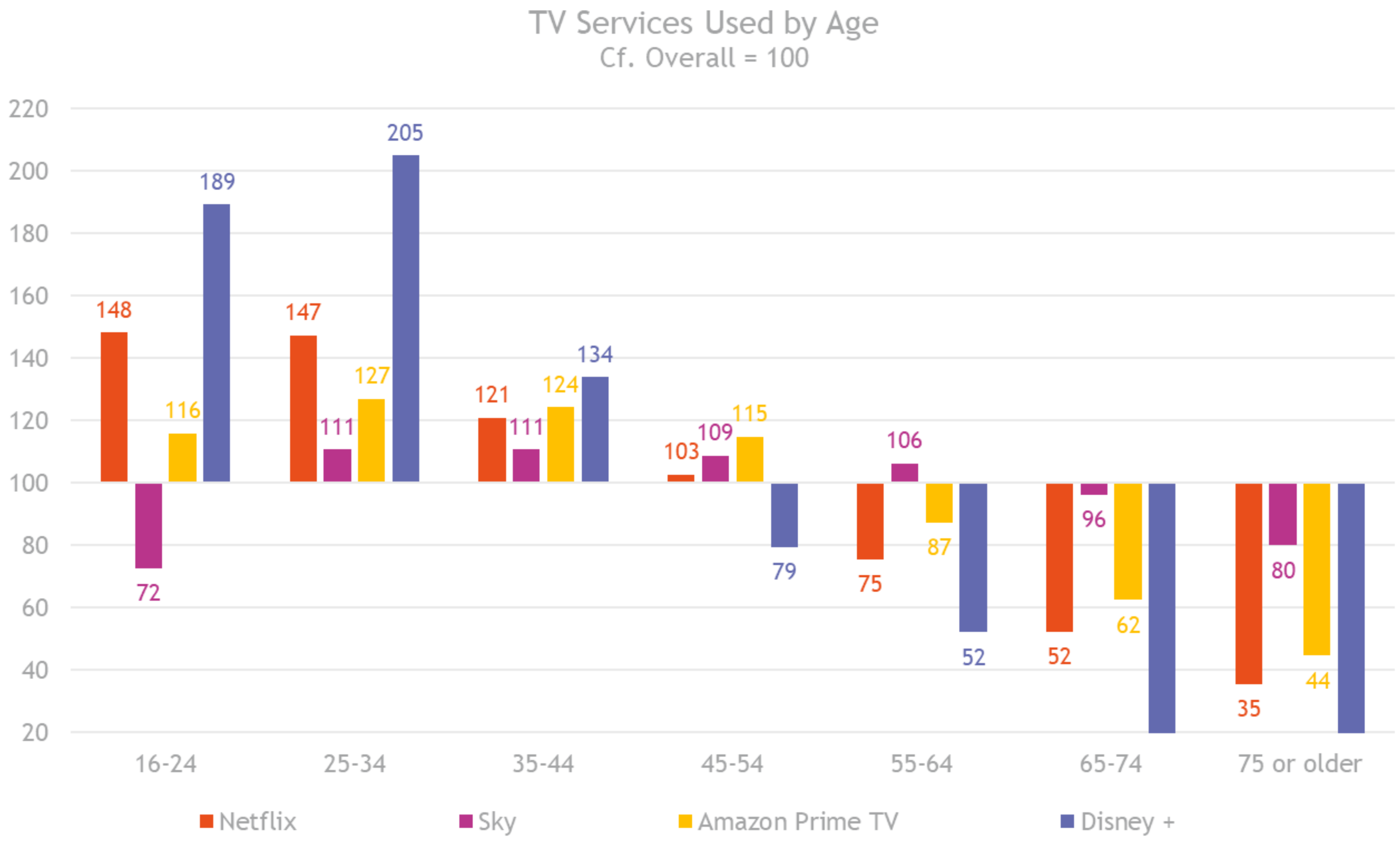
Other TV Services only - 4%

No TV Services - 29%

TV Streaming

Use of paid TV services is strongly linked to age, with more use by younger age-groups. This is particularly true for Disney+ and Netflix, with Amazon Prime peaking among 25-44 year olds.

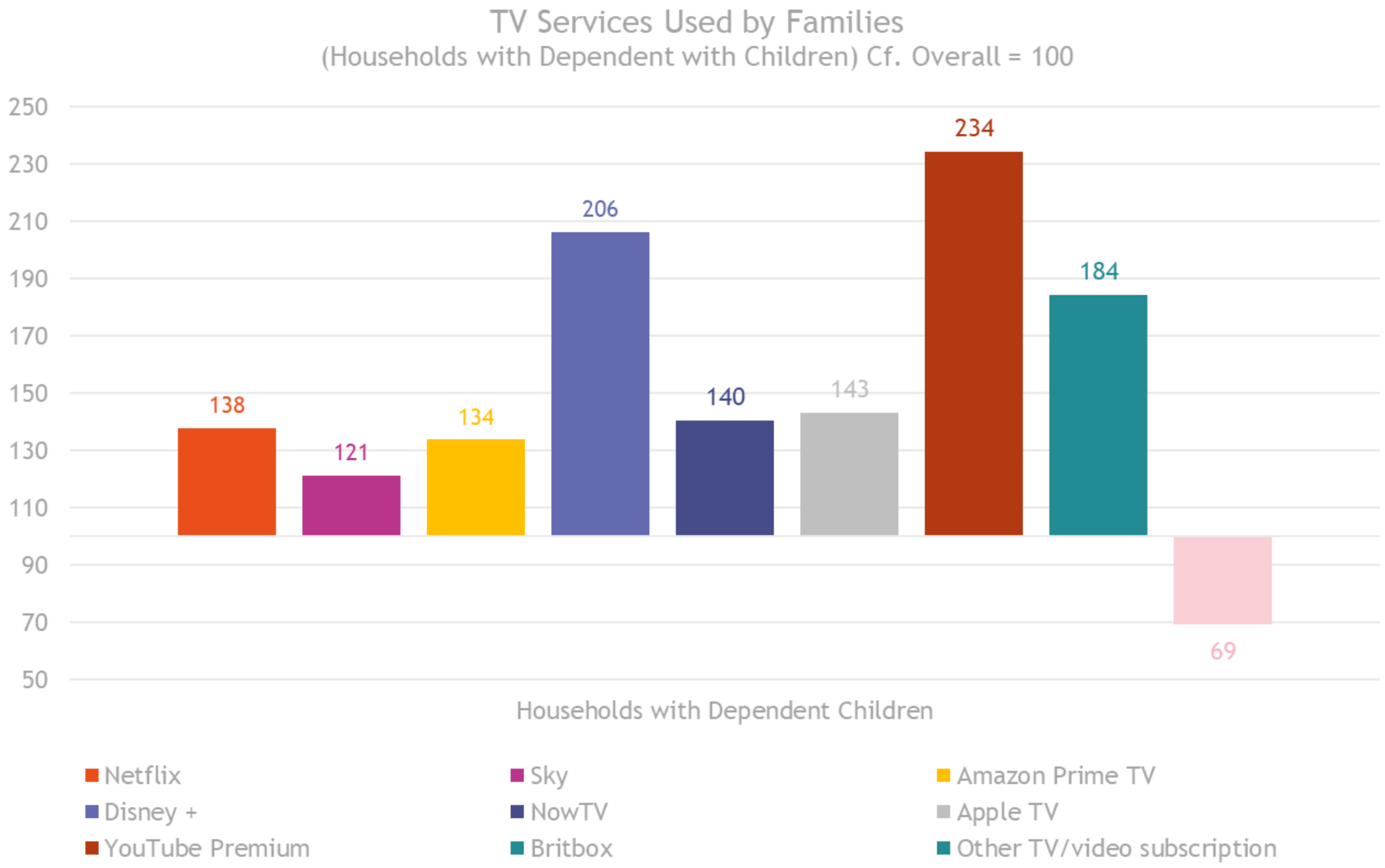
The age profile for Sky is much flatter, being below average for the youngest and oldest groups but above average for all age groups between 25 and 65.



TV Streaming

Families with dependent children in the household are more likely to use all services, in particular Youtube Premium (8%, cf. 2% of non-families), Disney+ (32%, cf. 10%) and Britbox (5% cf. 2%).

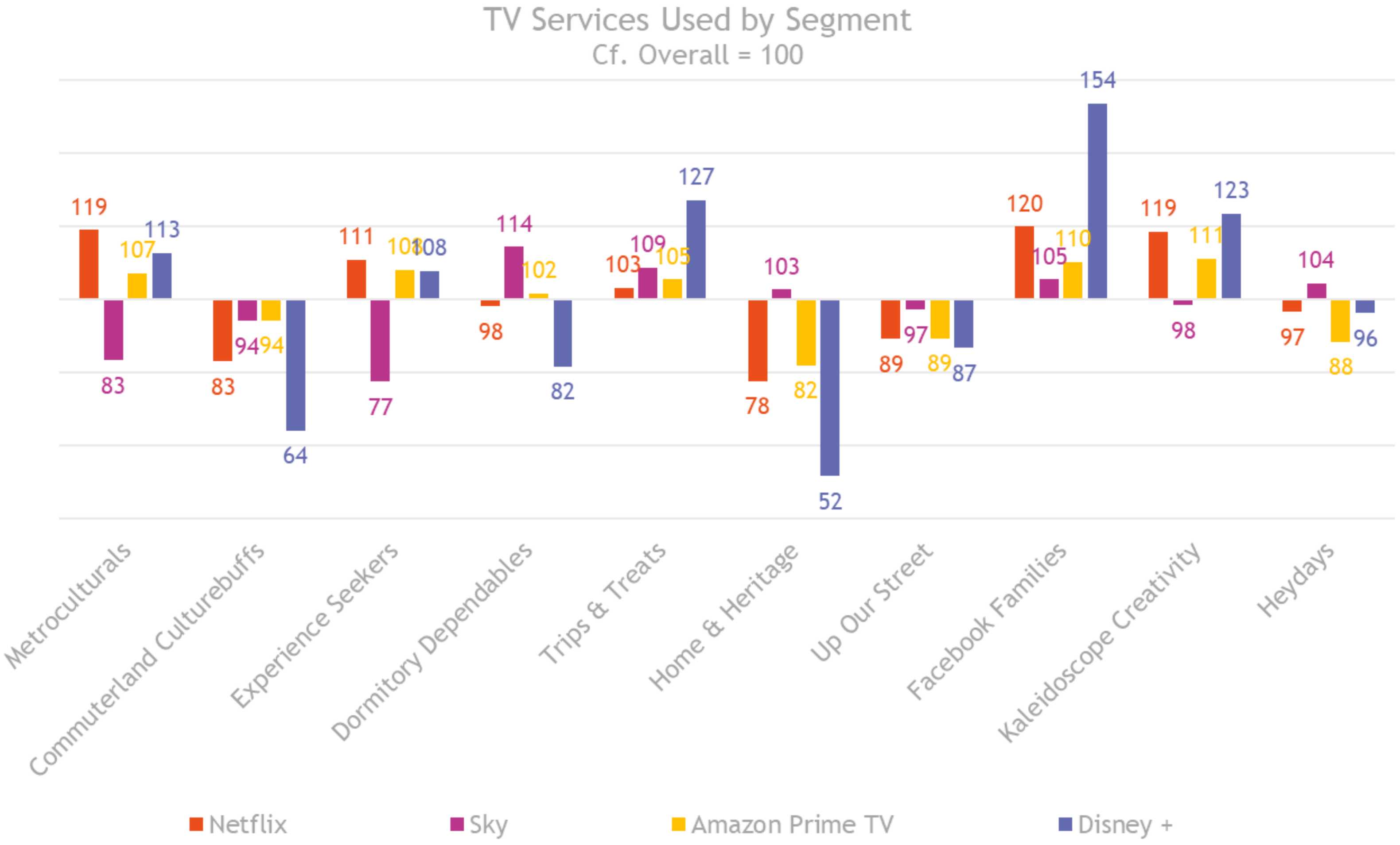
The highest used service by families is still Netflix (70%, cf. 44%); but Amazon Prime is second (40%, cf. 26%), with Sky 3rd (37%, cf. 28%).



TV Streaming

Facebook Families are most likely to use Disney +, followed by Trips & Treats and Kaleidoscope Creativity, with Home & Heritage and Commuterland Culturebuffs the least (these groups were also below average for almost all other services, as were Up Our Street and Heydays).

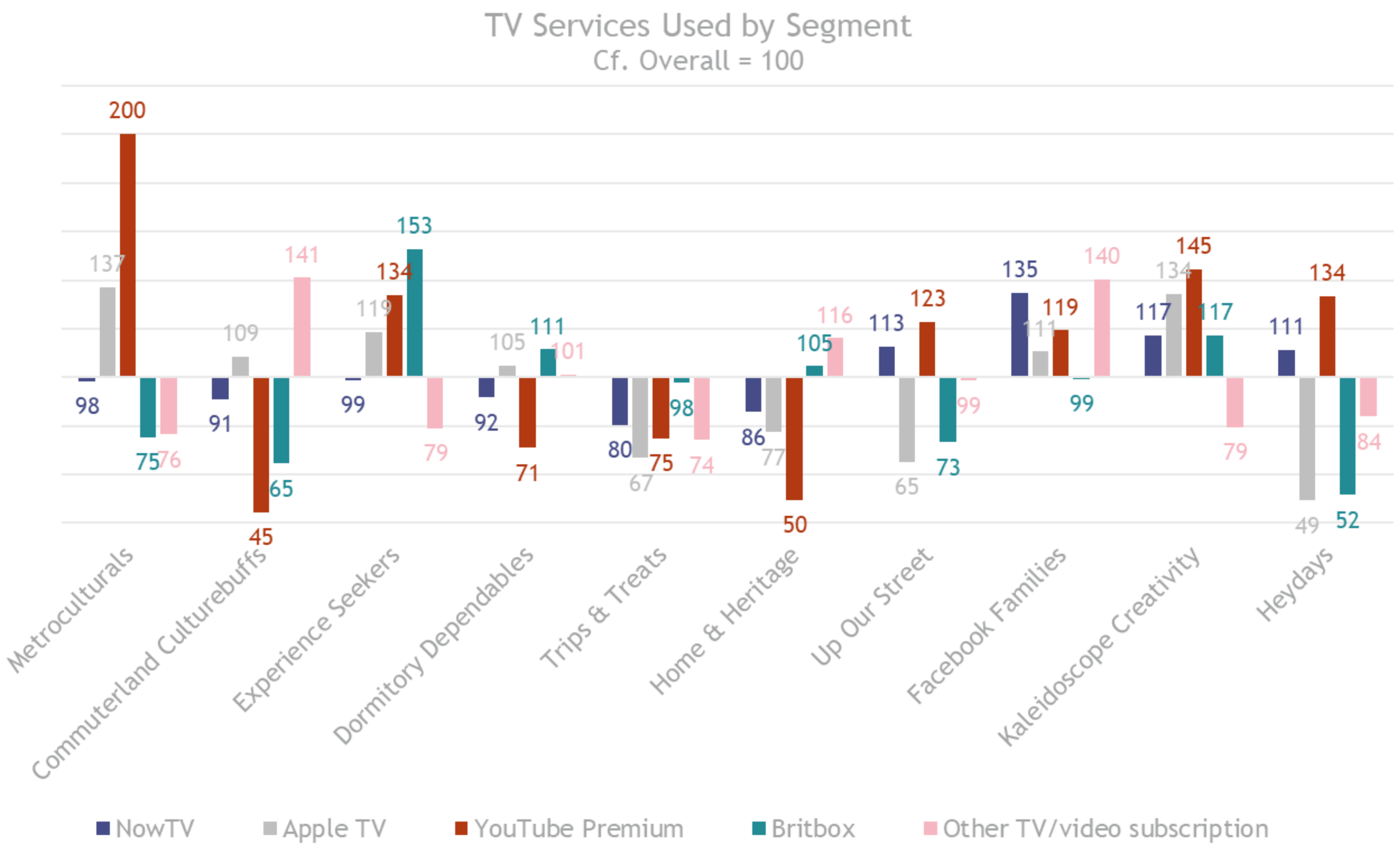
Experience Seekers are least likely to use Sky, followed by Metroculturals – but both of these groups are above average for Netflix, Amazon Prime and Disney+.



TV Streaming

Metroculturals are particularly likely to use Youtube Premium; Commuterland Culturebuffs and Home & Heritage are less likely to use it.

Experience Seekers are most likely to use Britbox and Facebook Families are most likely to use NowTV.



the audience agency

Use of Digital Technologies:
Video Games & VR/AR

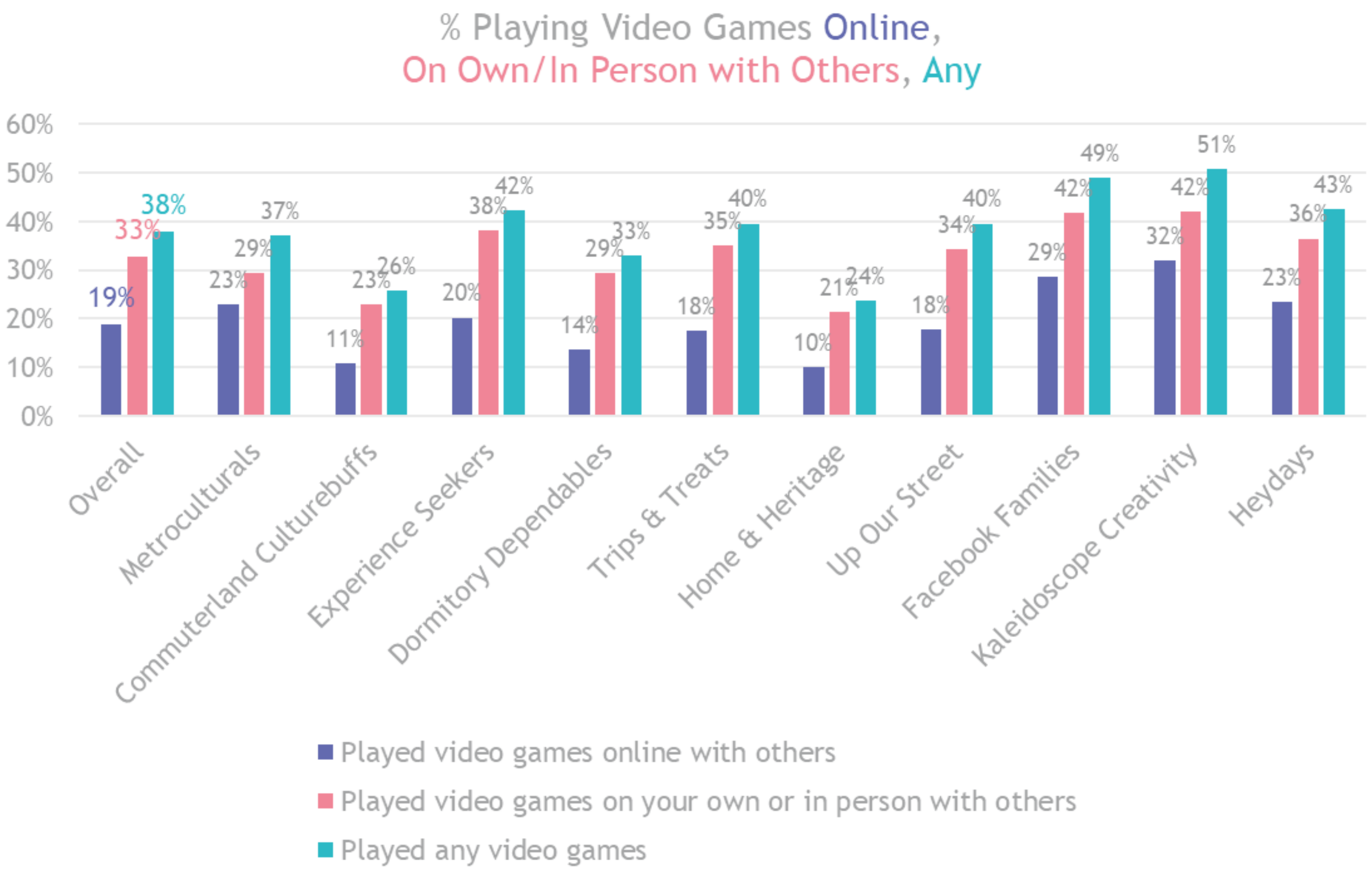
the audience agency

Playing Video Games

In the 12 months before lockdown, almost 4 in 10 people reported playing video games: 1 in 3 on their own, 1 in 5 online with others.

The highest segments for video games are Kaleidoscope Creativity and Facebook Families, with Heydays*, Experience Seekers and Trips and Treats all above average.

*This may be because of a substantial minority of students/under 24s within this otherwise older segment

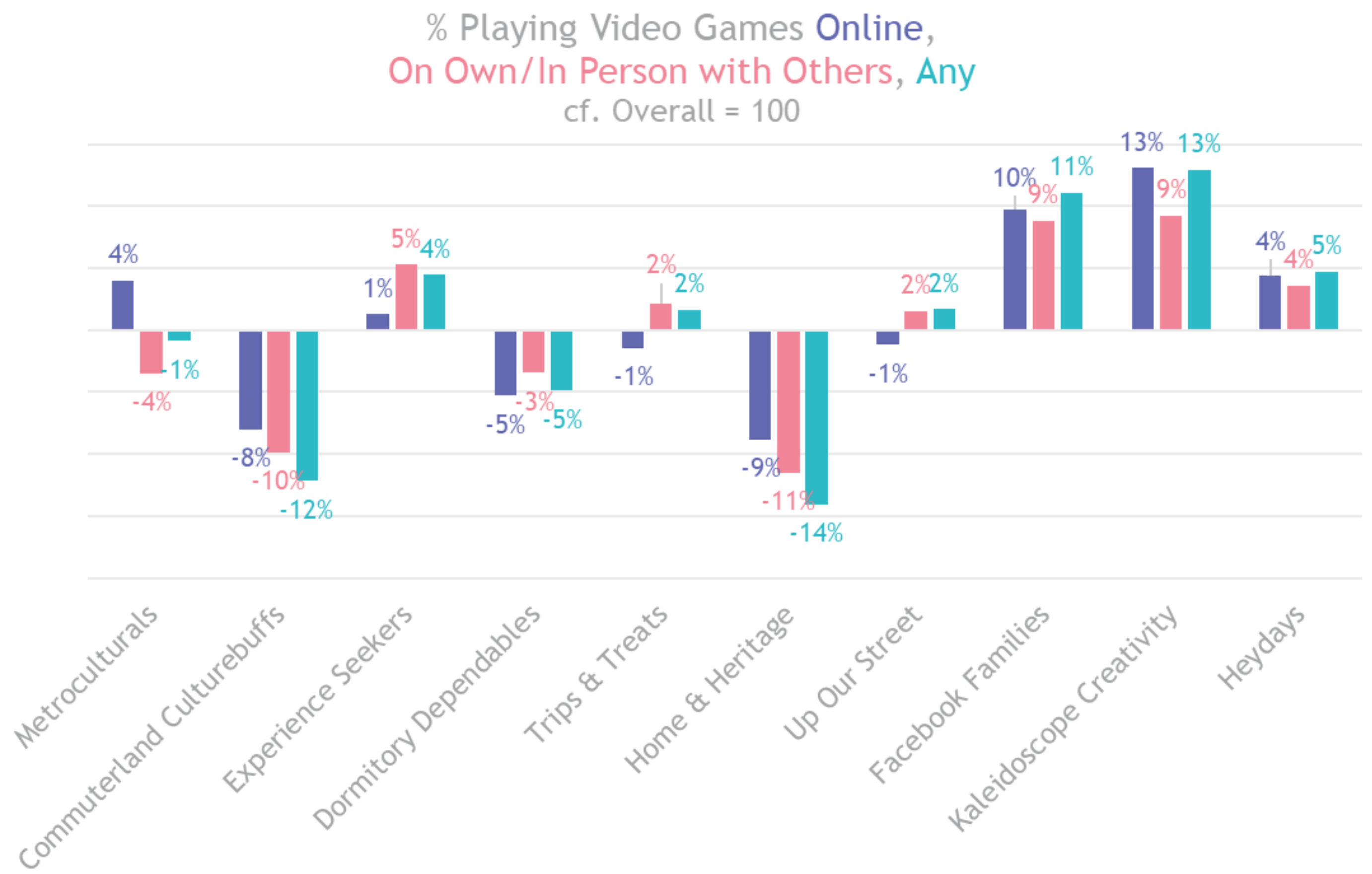


Playing Video Games

Comparing to the overall figures, the prominence of Facebook Families and Kaleidoscope Creativity is clear.

Metrocultural were particularly likely to be gaming online.

Commuterland Culturebuffs and, particularly, Home & Heritage are less likely to play video games, but still around a quarter of each group play.

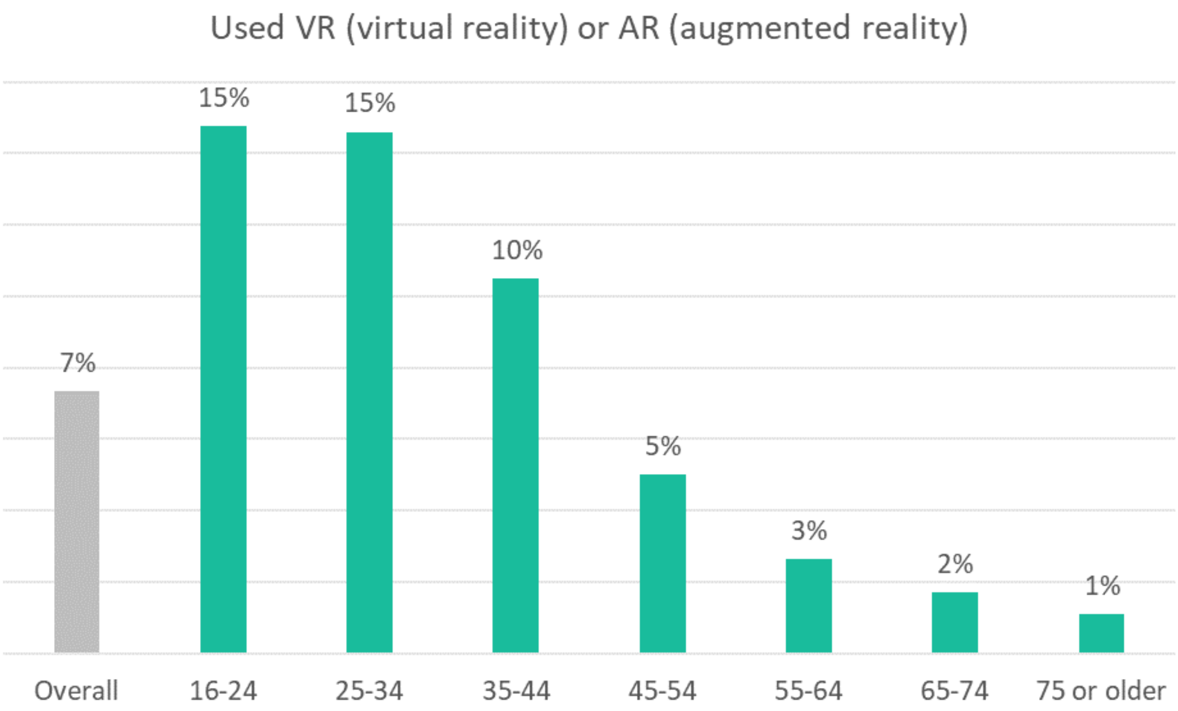


Use of VR/AR

VR/AR use, even if only 7% across the adult population as a whole, is notable within particular subgroups.

It is particular high for 16-34s, families with children and Londoners...

(Responses based on figures for the 12 months before lockdown)



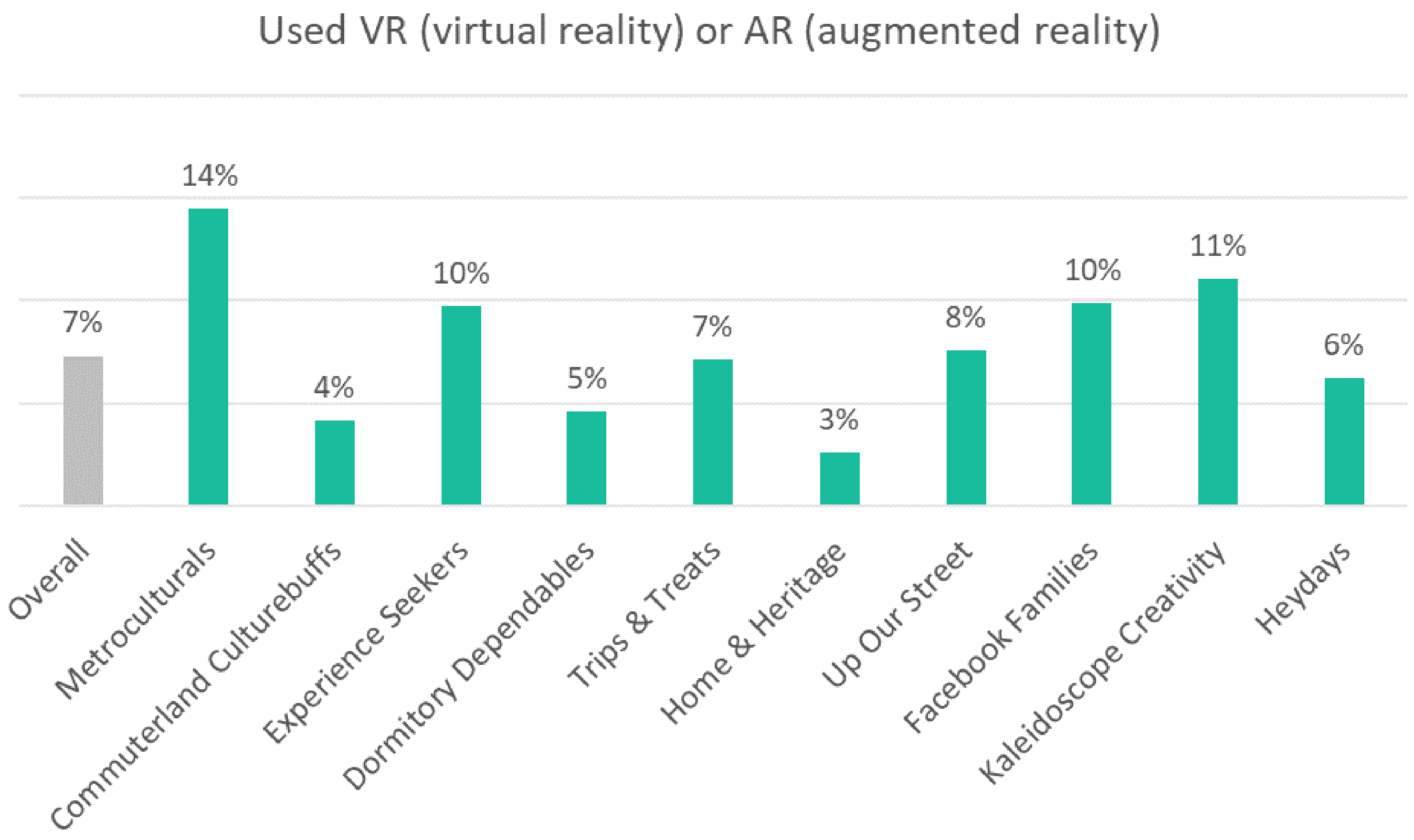
Families with children: 15% (vs 5% of those without)

London: 13%

Use of VR/AR

…which links to high proportions of Metroculturals, Experience Seekers and Kaleidoscope Creativity (again).

Notable too, though, is the 10% of Facebook Families: a segment that is more engaged with digital than with traditional arts and culture.



In Summary...

In Summary…

Varied impact of COVID

What people are doing (esp. watching plays/drama/musicals or music)

Online payment (inc. variations)

Engagement: drop in levels/difference by profile, location, family/not etc

More (and more up-to-date) insight into Audience Spectrum types' behaviour…

So…

Refresh understanding of Audience Spectrum types

Consider how digital could be meeting previously *unmet* needs

Tailor offer, payment etc to different audiences

Plan for post-COVID digital opportunities

We’re here to help

theaudienceagency.org
For digital support: katie.moffat@theaudienceagency.org

@audienceagents @katiemoffat @OliverMantell

the audience agency