Culture Restart Survey:

Engagement by Audience Spectrum

the audience agency

Introduction

Introduction

This analysis of data from the Culture Restart Audience & Visitor Tracker - delivered by Indigo Ltd, Baker Richards and One Further - is based on 10,727 responses from the survey's baseline period of October to December 2020.

For more on the methodology, see www.indigo-ltd.com/culture-restart-toolkit

INSIGHTS ALLIANCE

indigo

BAKERRICHARDS

One Further

supporting cultural recovery

Introduction

We have focused on two strands of questions:

- Engagement in person
- Watching content online

Specifically, focusing on how responses vary by Audience Spectrum group.

This shows which types of the core audiences targeted by this survey engage in different ways, as well as allowing comparison to similar groups from the whole population, via our Covid-19 Cultural Participation Monitor.

* Audience Spectrum is The Audience Agency's cultural segmentation tool

Summary of Questions Used

IN PERSON

Q. 11 Prev. Frequency of Attendance? → Q. 17 Attended Already (Since COVID)? → Q. 23 Booked New Events? → Q. 15* In Future <u>Attend</u> More/Less? → Q. 16* In Future <u>Spend</u> More/Less?

IF NO: ↓

Q. 29 How Feeling About Attending?

*BASELINE ONLY

ONLINE

Q. 36 Watched Culture Online? → Q. 40 Interested in Culture Online? → Q. 46 Attitudes re Future Culture Online, cf. In Person?

IF YES [Since COVID]: ↓

Q. 37 How Many Times?

Findings

IN PERSON

Q. 11 Prev. Frequency of Attendance?

Q. 17 Attended Already (Since COVID)?

Q. 23 Booked New Events?

IF NO:

Q. 29 How Feeling About Attending?

Q. 15* In Future Attend More/Less?

Q. 16* In Future Spend More/Less?

*BASELINE ONLY

ONLINE

Q. 36 Watched Culture Online?

IF YES [Since COVID]:

Q. 37 How Many Times?

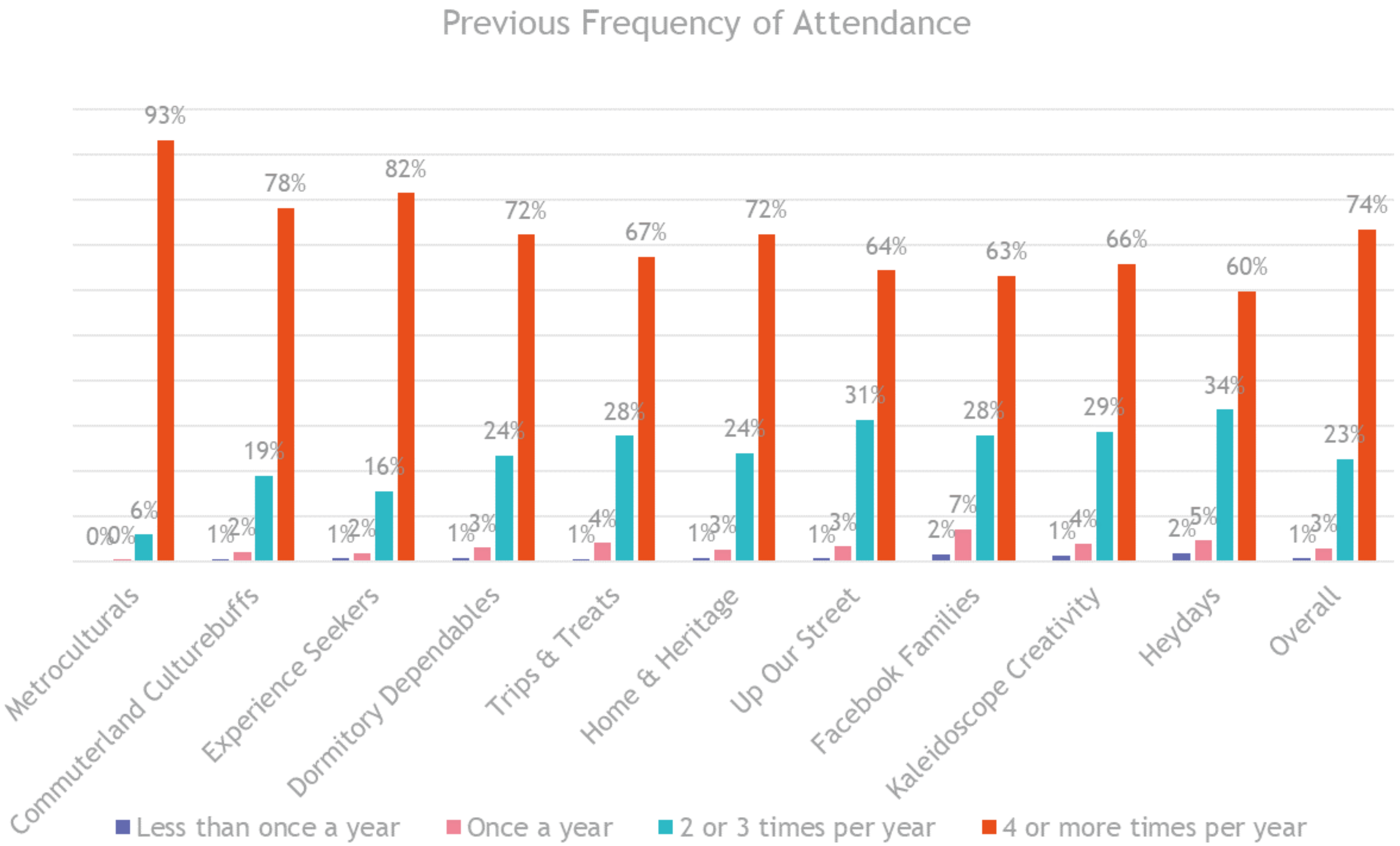
Q. 40 Interested in Culture Online?

Q. 46 Attitudes re Future Culture Online, cf. In Person?

Previous Frequency of Cultural Attendance by Segment

IN PERSON

Previous frequency matched typical high/medium/low engagement by segment: with Metroculturals and Experience Seekers particularly high.



*Q: "How often would you say that you attended or visited cultural experiences before Coronavirus?"

the audience agency

I N

P E R S O N

Q. 11 Prev. Frequency of Attendance?

Q. 17 Attended Already (Since COVID)?

Q. 23 Booked New Events?

IF NO:

Q. 29 How Feeling About Attending?

Q. 15* In Future Attend More/Less?

Q. 16* In Future Spend More/Less?

*BASELINE ONLY

ONLINE

Q. 36 Watched Culture Online?

IF YES [Since COVID]:

Q. 37 How Many Times?

Q. 40 Interested in Culture Online?

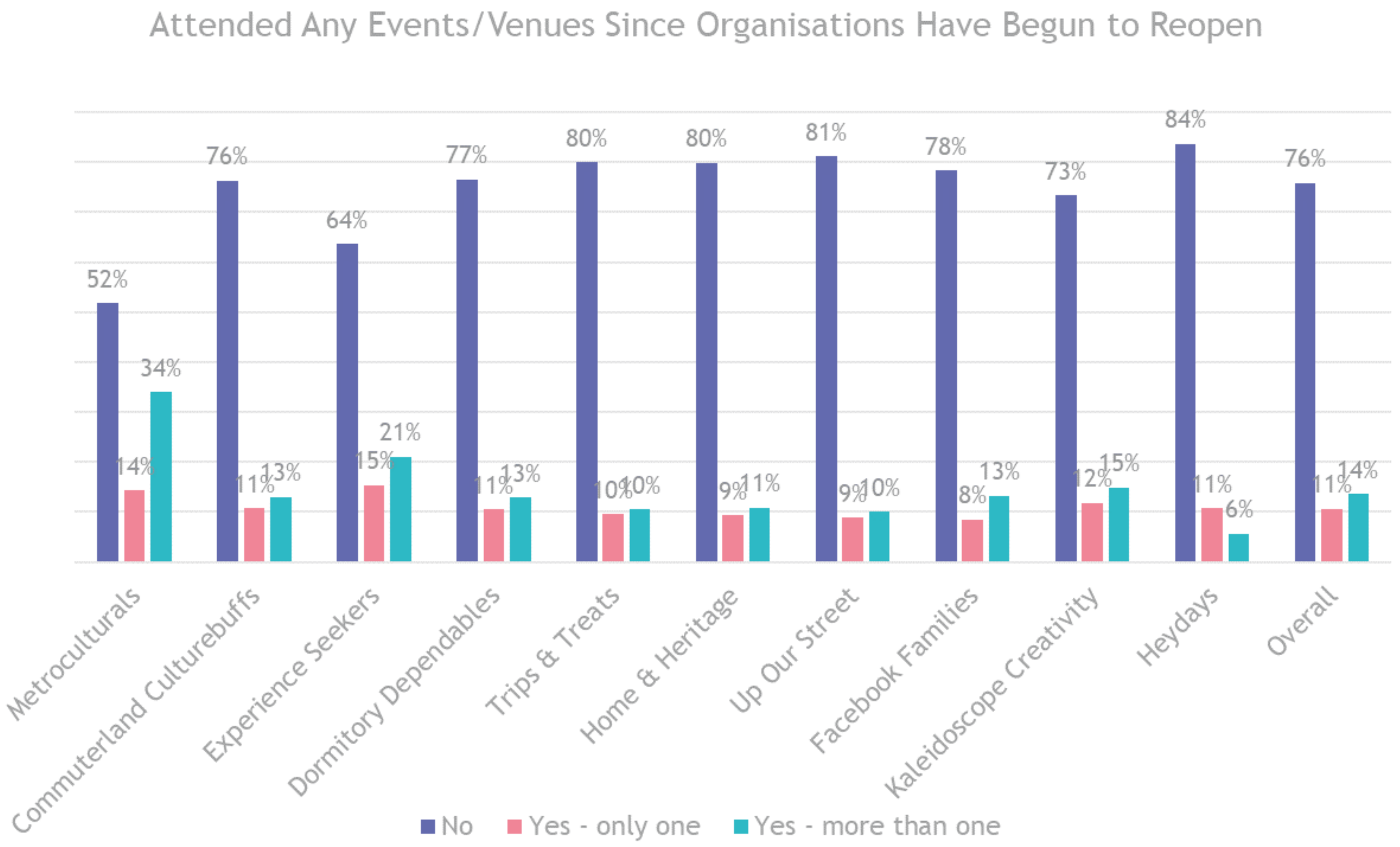
Q. 46 Attitudes re Future Culture Online, cf. In Person?

Attended Already (Since COVID)

IN PERSON

Metroculturals (followed by Experience Seekers) were particularly likely to have a) returned and b) done so more than once.

Kaleidoscope Creativity were next most likely, ahead of Commuterland Culturebuffs (who are typically higher engaged)



IN PERSON

Q. 11 Prev. Frequency of Attendance?

Q. 17 Attended Already (Since COVID)?

Q. 23 Booked New Events?

IF NO:

Q. 29 How Feeling About Attending?

Q. 15* In Future Attend More/Less?

Q. 16* In Future Spend More/Less?

*BASELINE ONLY

ONLINE

Q. 36 Watched Culture Online?

IF YES [Since COVID]:

Q. 37 How Many Times?

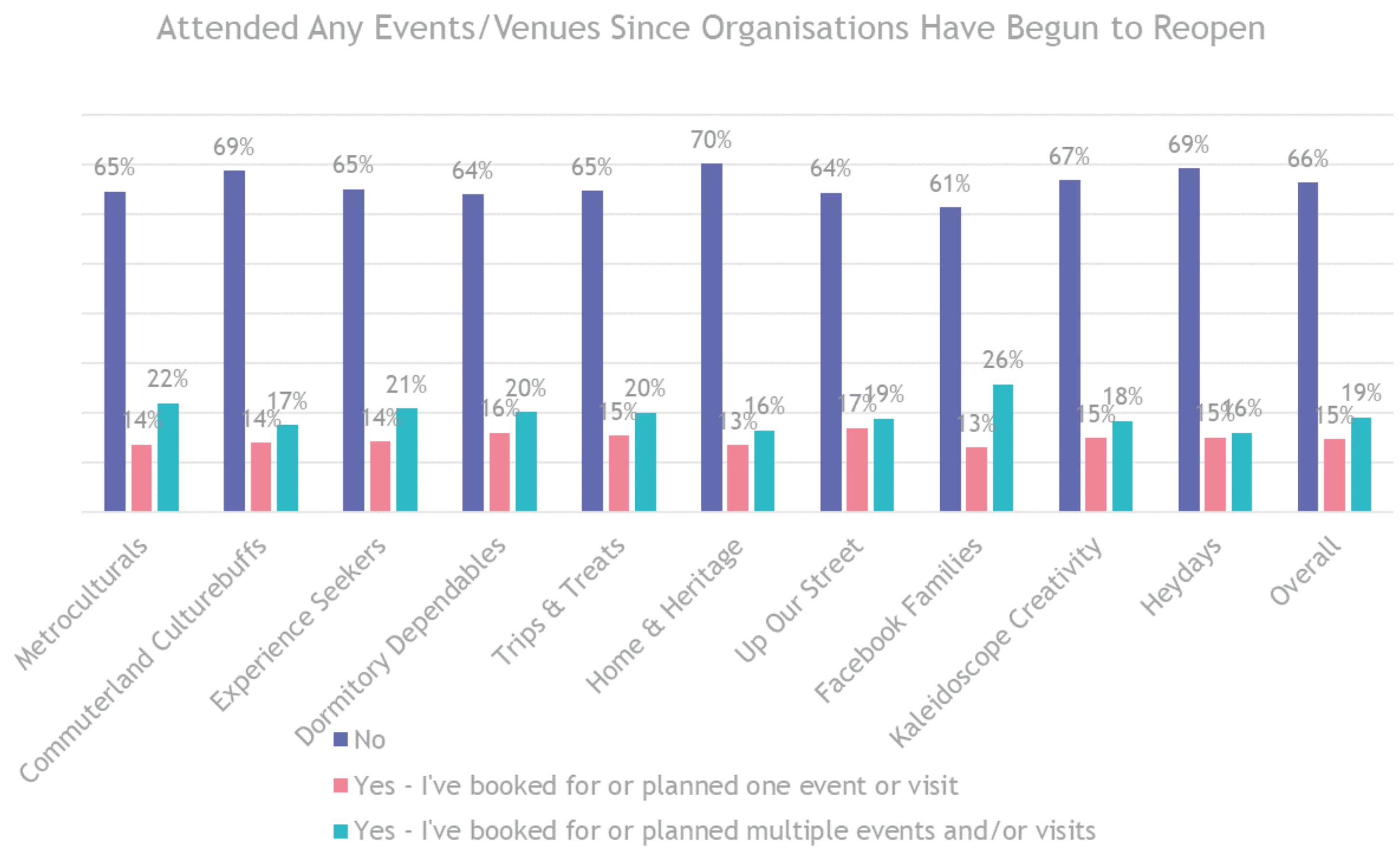
Q. 40 Interested in Culture Online?

Q. 46 Attitudes re Future Culture Online, cf. In Person?

Whether Segments Had Booked for New Events

IN PERSON

Facebook Families were most likely to have booked multiple events in the future, with Heydays and Home & Heritage 9-10% less likely to have.



IN PERSON

Q. 11 Prev. Frequency of Attendance?

Q. 17 Attended Already (Since COVID)?

Q. 23 Booked New Events?

IF NO:

Q. 29 How Feeling About Attending?

Q. 15* In Future Attend More/Less?

Q. 16* In Future Spend More/Less?

*BASELINE ONLY

ONLINE

Q. 36 Watched Culture Online?

IF YES [Since COVID]:

Q. 37 How Many Times?

Q. 40 Interested in Culture Online?

Q. 46 Attitudes re Future Culture Online, cf. In Person?

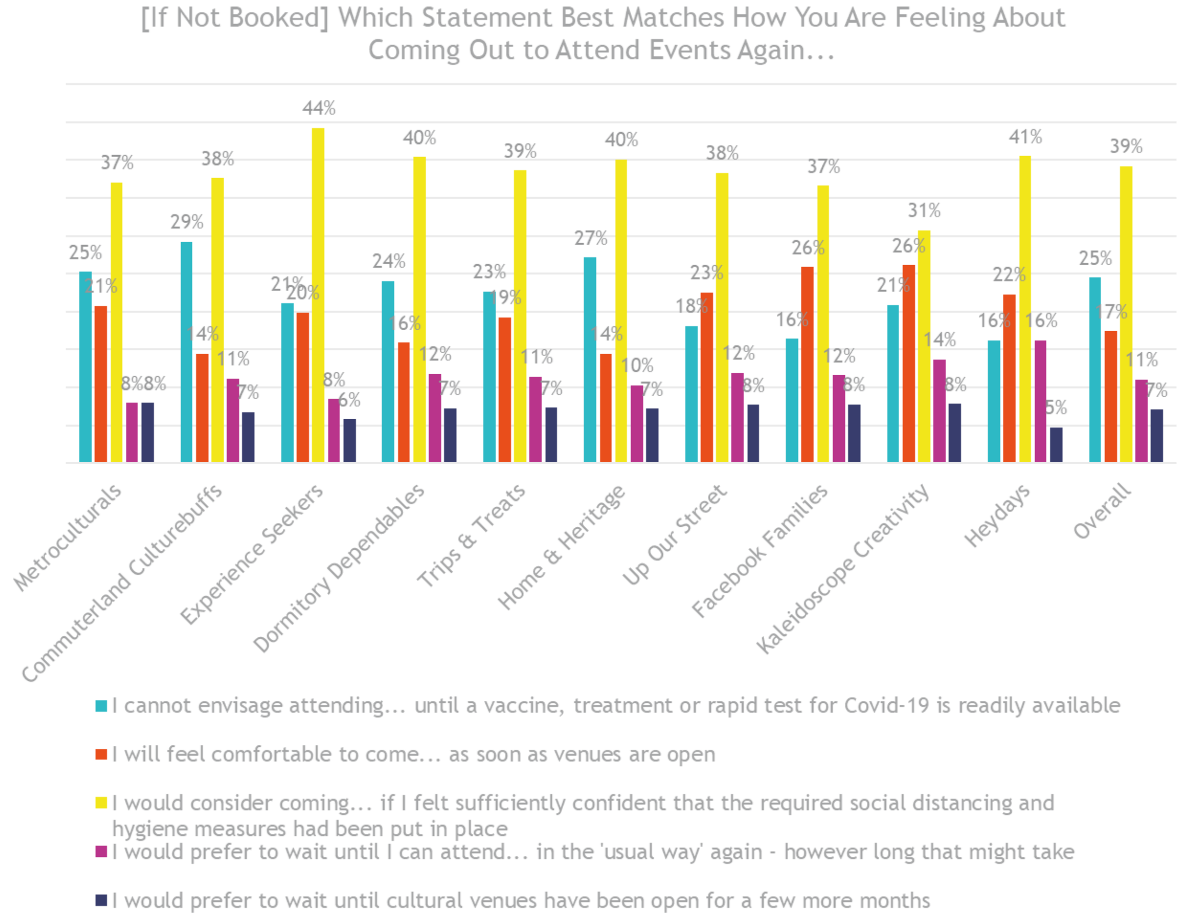
the audience agency

How Those Who Hadn’t Booked Feel About Attending

I N PERSON

Lower engaged segments were more likely to say they were comfortable to come as soon as venues are open, Experience Seekers to say that they’d consider coming if appropriate measures were in place.

Vaccines/testing were most important for older groups like Commuterland Culturebuffs, Home & Heritage and Heydays; but no more than 8% of non-bookers for any group said they’d rather wait a few more months, regardless.

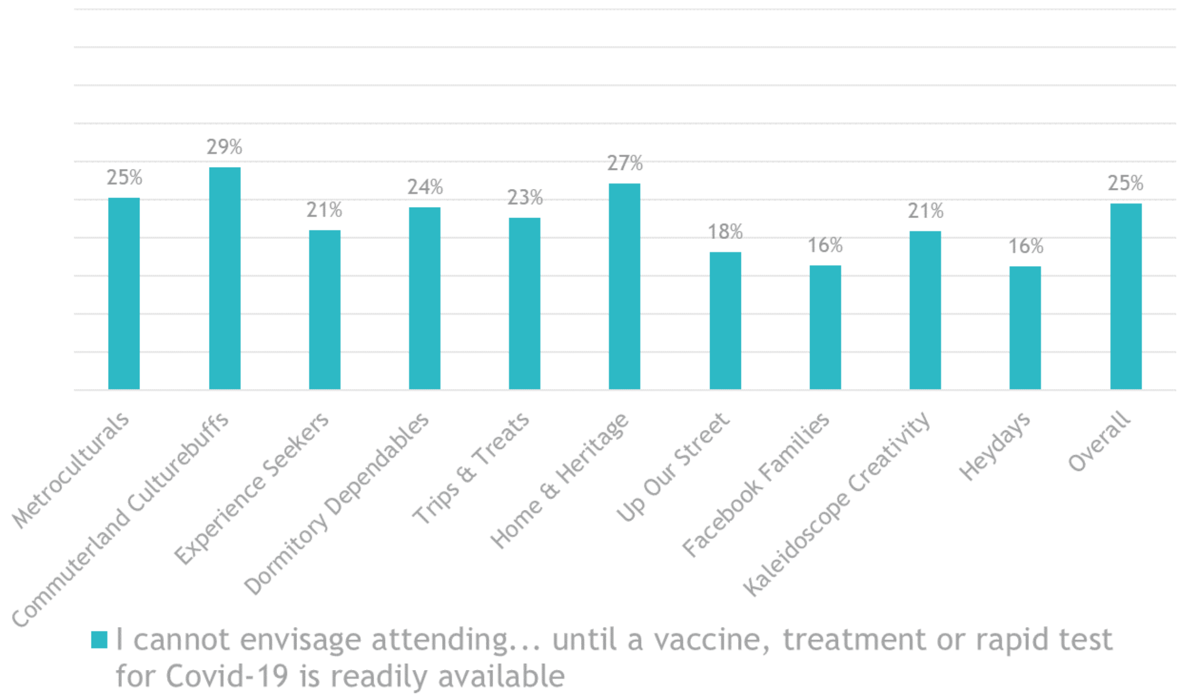


How Those Who Hadn't Booked Feel About Attending

IN PERSON

Lower engaged segments were more likely to say they were comfortable to come as soon as venues are open, Experience Seekers to say that they'd consider coming if appropriate measures were in place.

Vaccines/testing were most important for older groups like Commuterland Culturebuffs, Home & Heritage and Heydays; but no more than 8% of non-bookers for any group said they'd rather wait a few more months, regardless.



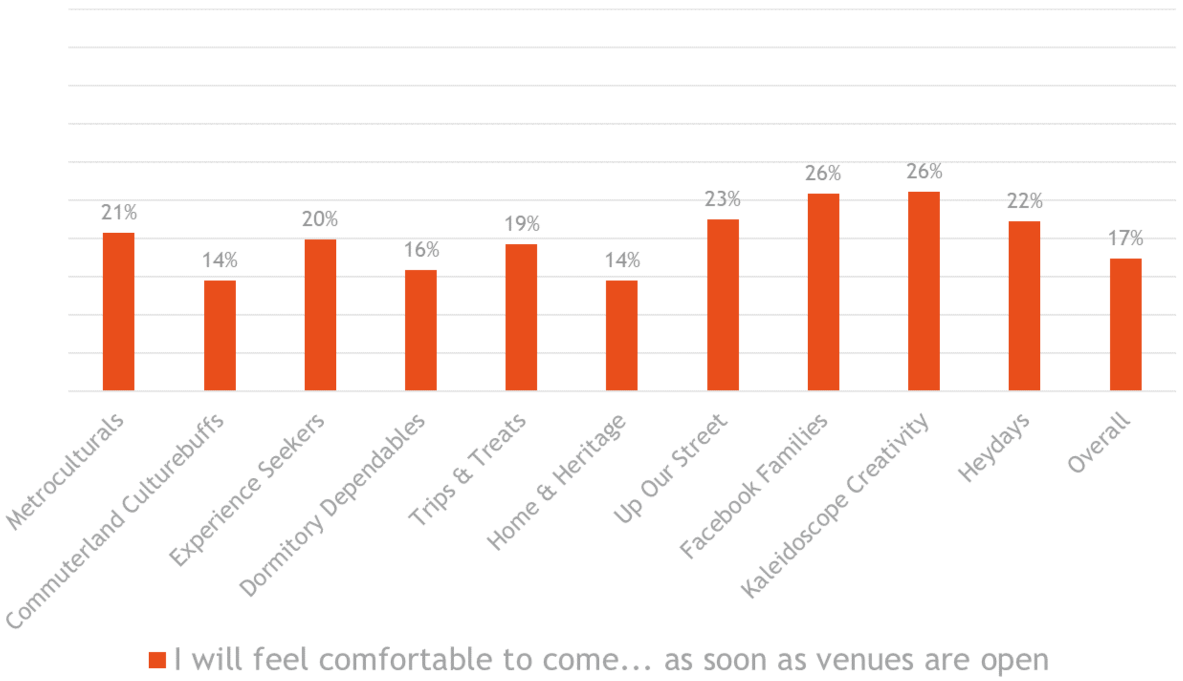
*Q: "Which Statement Best Matches How You Are Feeling About Coming Out to Attend Events Again...?"

How Those Who Hadn't Booked Feel About Attending

IN PERSON

Lower engaged segments were more likely to say they were comfortable to come as soon as venues are open, Experience Seekers to say that they'd consider coming if appropriate measures were in place.

Vaccines/testing were most important for older groups like Commuterland Culturebuffs, Home & Heritage and Heydays; but no more than 8% of non-bookers for any group said they'd rather wait a few more months, regardless.



*Q: "Which Statement Best Matches How You Are Feeling About Coming Out to Attend Events Again...?"

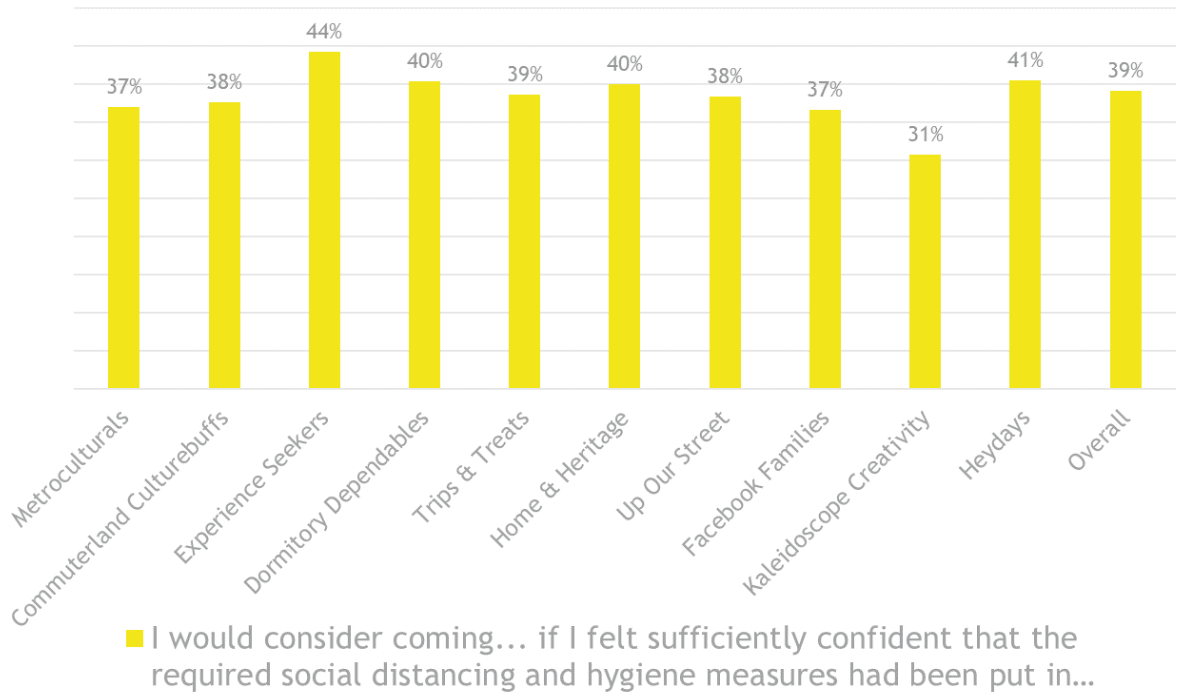
the audience agency

How Those Who Hadn't Booked Feel About Attending

IN PERSON

Lower engaged segments were more likely to say they were comfortable to come as soon as venues are open, Experience Seekers to say that they'd consider coming if appropriate measures were in place.

Vaccines/testing were most important for older groups like Commuterland Culturebuffs, Home & Heritage and Heydays; but no more than 8% of non-bookers for any group said they'd rather wait a few more months, regardless.



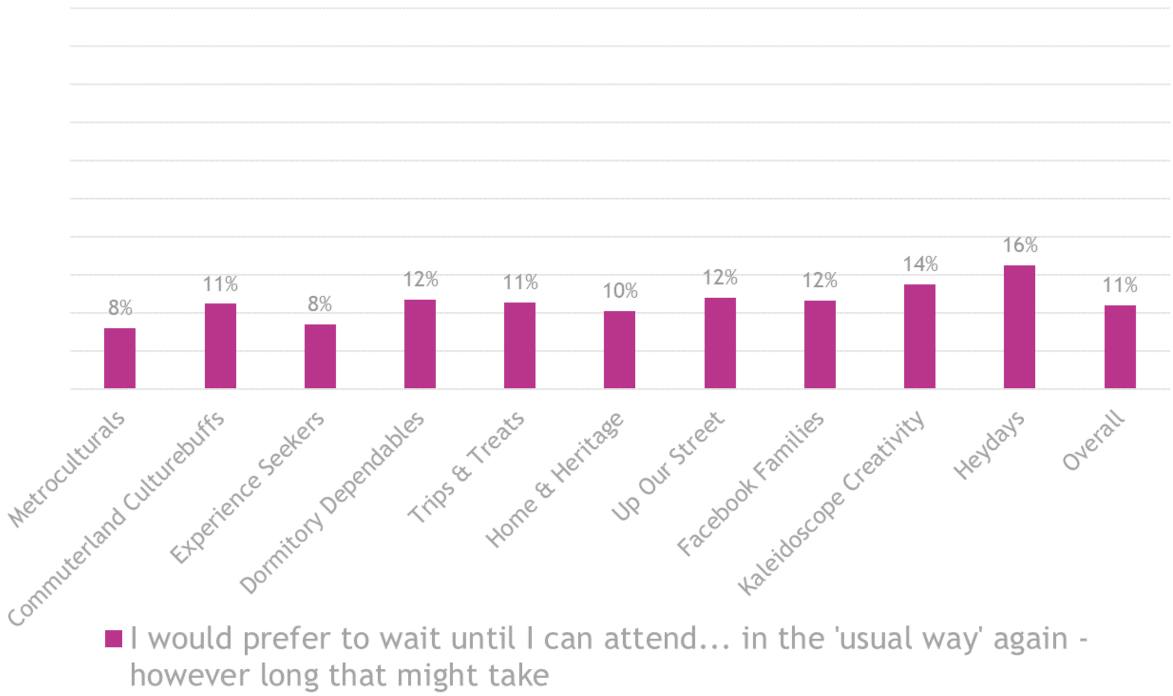
*Q: "Which Statement Best Matches How You Are Feeling About Coming Out to Attend Events Again...?"

How Those Who Hadn't Booked Feel About Attending

IN PERSON

Lower engaged segments were more likely to say they were comfortable to come as soon as venues are open, Experience Seekers to say that they'd consider coming if appropriate measures were in place.

Vaccines/testing were most important for older groups like Commuterland Culturebuffs, Home & Heritage and Heydays; but no more than 8% of non-bookers for any group said they'd rather wait a few more months, regardless.



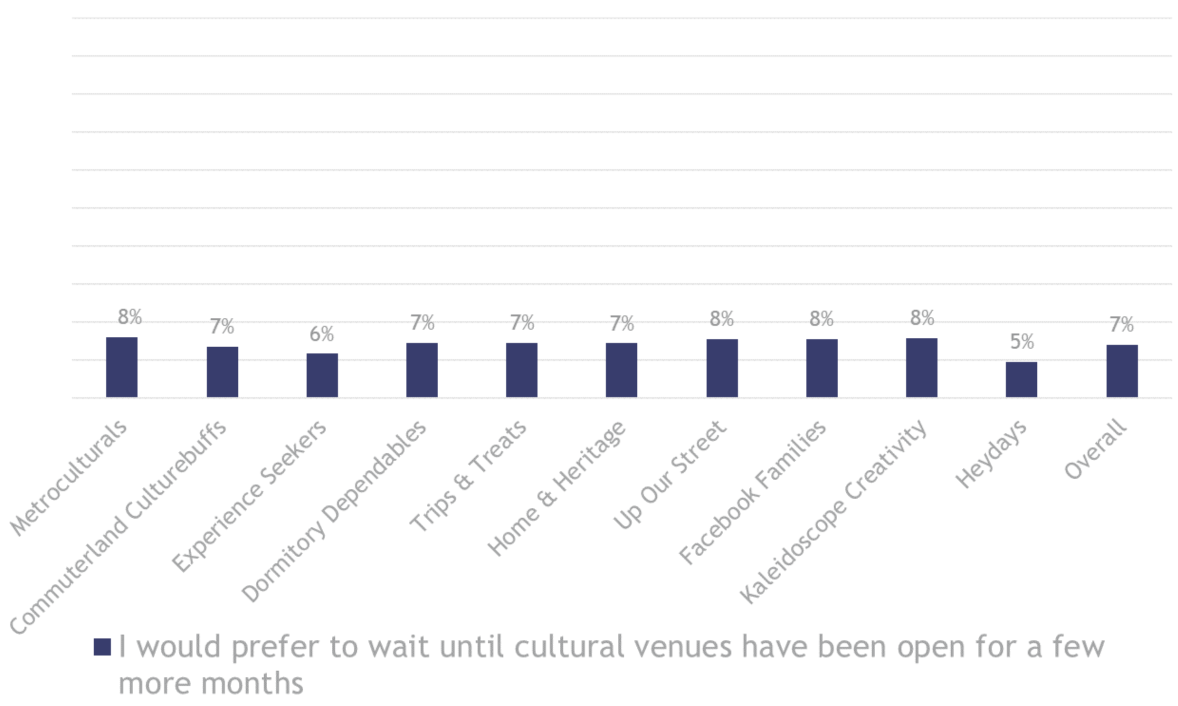
*Q: "Which Statement Best Matches How You Are Feeling About Coming Out to Attend Events Again...?"

How Those Who Hadn't Booked Feel About Attending

IN PERSON

Lower engaged segments were more likely to say they were comfortable to come as soon as venues are open, Experience Seekers to say that they'd consider coming if appropriate measures were in place.

Vaccines/testing were most important for older groups like Commuterland Culturebuffs, Home & Heritage and Heydays; but no more than 8% of non-bookers for any group said they'd rather wait a few more months, regardless.



*Q: "Which Statement Best Matches How You Are Feeling About Coming Out to Attend Events Again...?"

IN PERSON

Q. 11 Prev. Frequency of Attendance? → Q. 17 Attended Already (Since COVID)? → Q. 23 Booked New Events? → **Q. 15* In Future Attend More/Less?** → Q. 16* In Future Spend More/Less?

IF NO: ↓ Q. 29 How Feeling About Attending?

*BASELINE ONLY

ONLINE

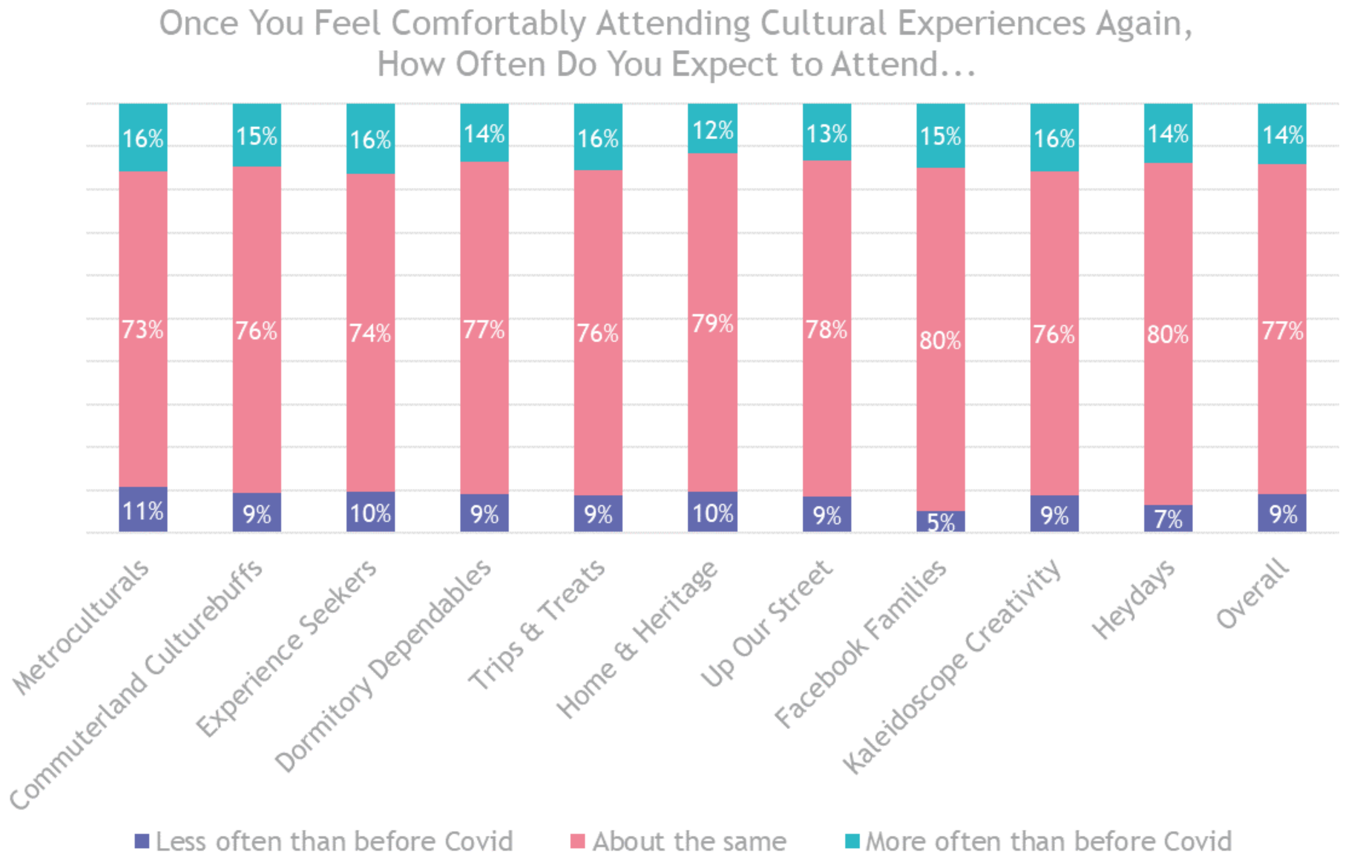
Q. 36 Watched Culture Online? → Q. 40 Interested in Culture Online? → Q. 46 Attitudes re Future Culture Online, cf. In Person?

IF YES [Since COVID]: ↓ Q. 37 How Many Times?

Future Expectations of Frequency by Segment

IN PERSON

All segments mostly expected to attend 'about the same' amount, but with higher proportions expecting to attend more in future, rather than less.



the audience agency

IN PERSON

Q. 11 Prev. Frequency of Attendance?

Q. 17 Attended Already (Since COVID)?

Q. 23 Booked New Events?

IF NO:

Q. 29 How Feeling About Attending?

Q. 15* In Future Attend More/Less?

Q. 16* In Future Spend More/Less?

*BASELINE ONLY

ONLINE

Q. 36 Watched Culture Online?

IF YES [Since COVID]:

Q. 37 How Many Times?

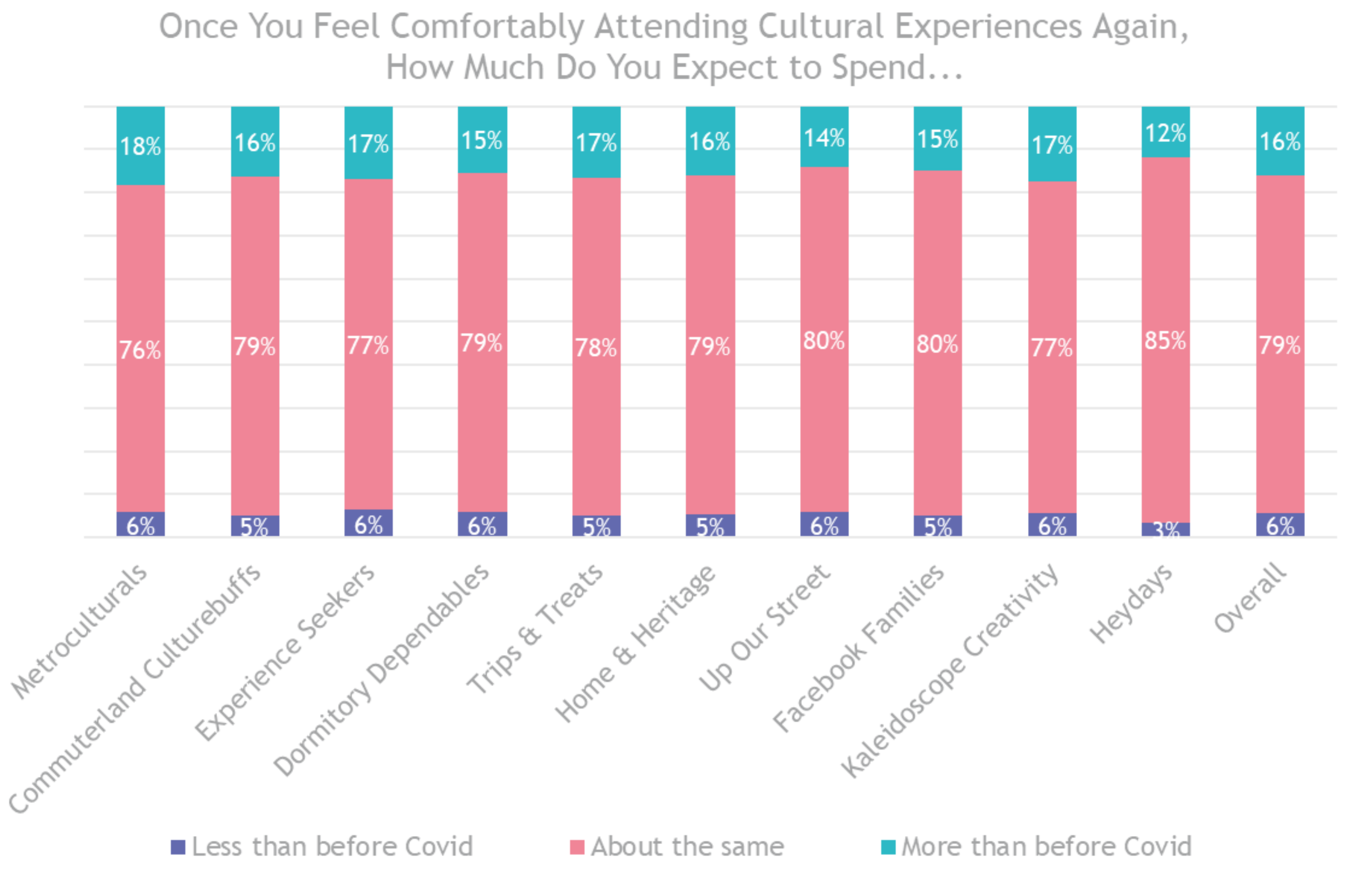
Q. 40 Interested in Culture Online?

Q. 46 Attitudes re Future Culture Online, cf. In Person?

Future Expectations of Spend by Segment

IN PERSON

All segments mostly expected to spend ‘about the same’ amount, but with higher proportions expecting to spend more in future, rather than less. This inc. 18% of Metroculturals and 17% of Experience Seekers, Trips & Treat and Kaleidoscope Creativity.



IN PERSON

Q. 11 Prev. Frequency of Attendance?

Q. 17 Attended Already (Since COVID)?

Q. 23 Booked New Events?

IF NO:

Q. 29 How Feeling About Attending?

Q. 15* In Future Attend More/Less?

Q. 16* In Future Spend More/Less?

*BASELINE ONLY

ONLINE

Q. 36 Watched Culture Online?

IF YES [Since COVID]:

Q. 37 How Many Times?

Q. 40 Interested in Culture Online?

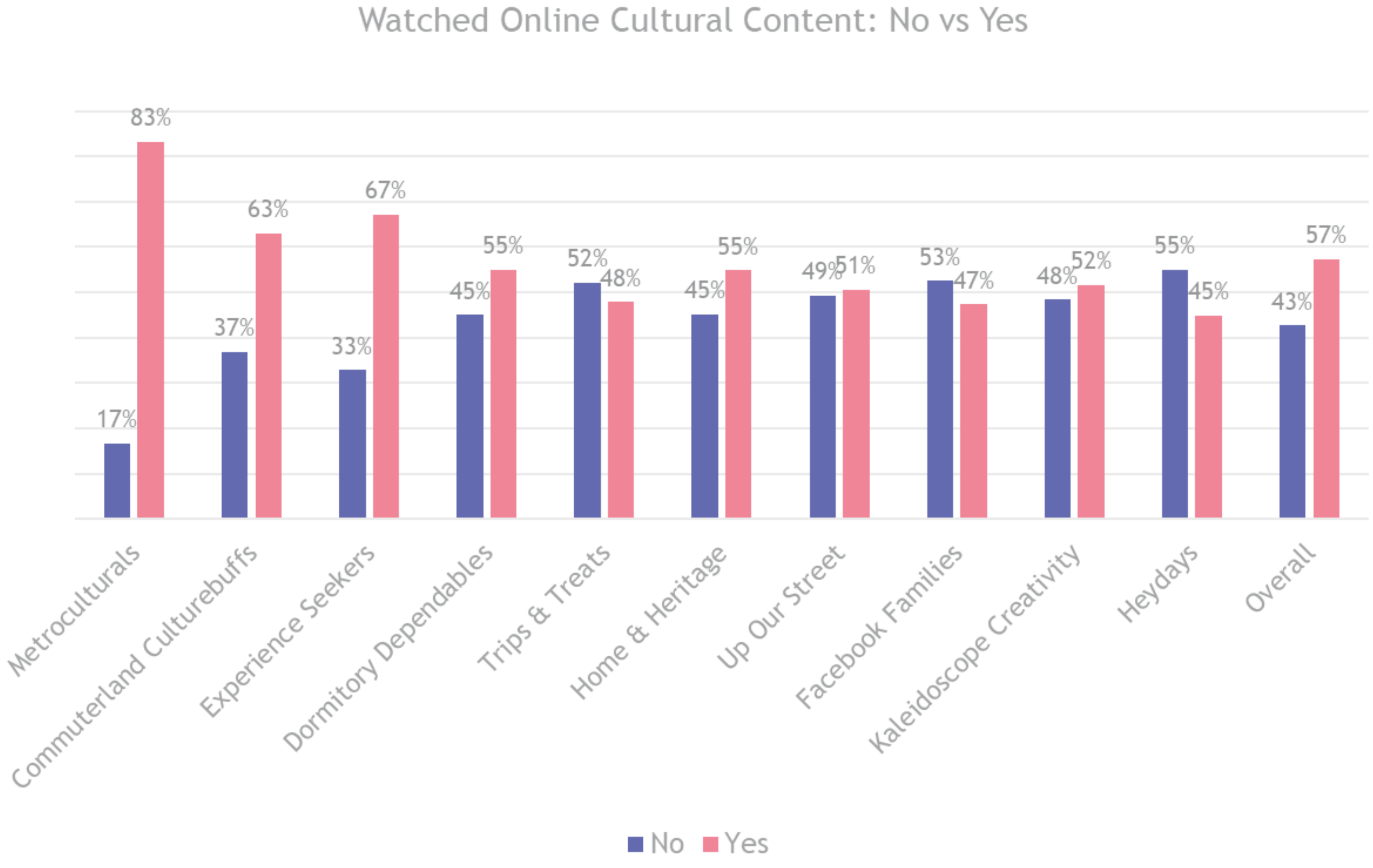
Q. 46 Attitudes re Future Culture Online, cf. In Person?

Whether Segments Had Watched Culture Online

Online engagement was highest for segments that typically engage most in person, especially Metroculturals followed by Experience Seekers.

A majority of Trips & Treats, Facebook Families and Heydays hadn't engaged online.

ONLINE

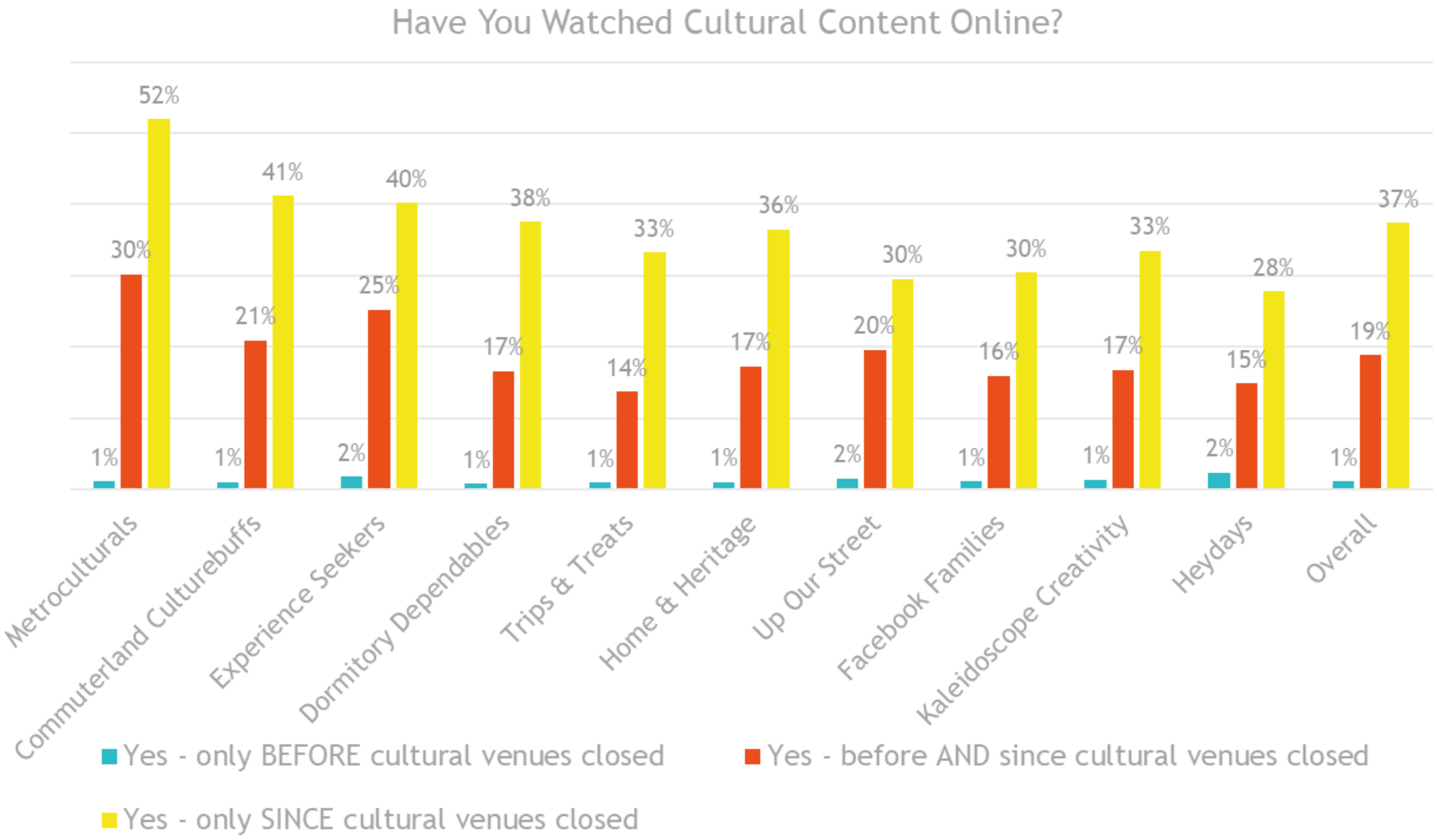


Whether Segments Had Watched Culture Online

Online engagement was highest for segments that typically engage most in person, especially Metroculturals followed by Experience Seekers.

A majority of Trips & Treats, Facebook Families and Heydays hadn't engaged online.

ONLINE



IN PERSON

Q. 11 Prev. Frequency of Attendance?

Q. 17 Attended Already (Since COVID)?

Q. 23 Booked New Events?

IF NO:

Q. 29 How Feeling About Attending?

Q. 15* In Future Attend More/Less?

Q. 16* In Future Spend More/Less?

*BASELINE ONLY

ONLINE

Q. 36 Watched Culture Online?

IF YES [Since COVID]:

Q. 37 How Many Times?

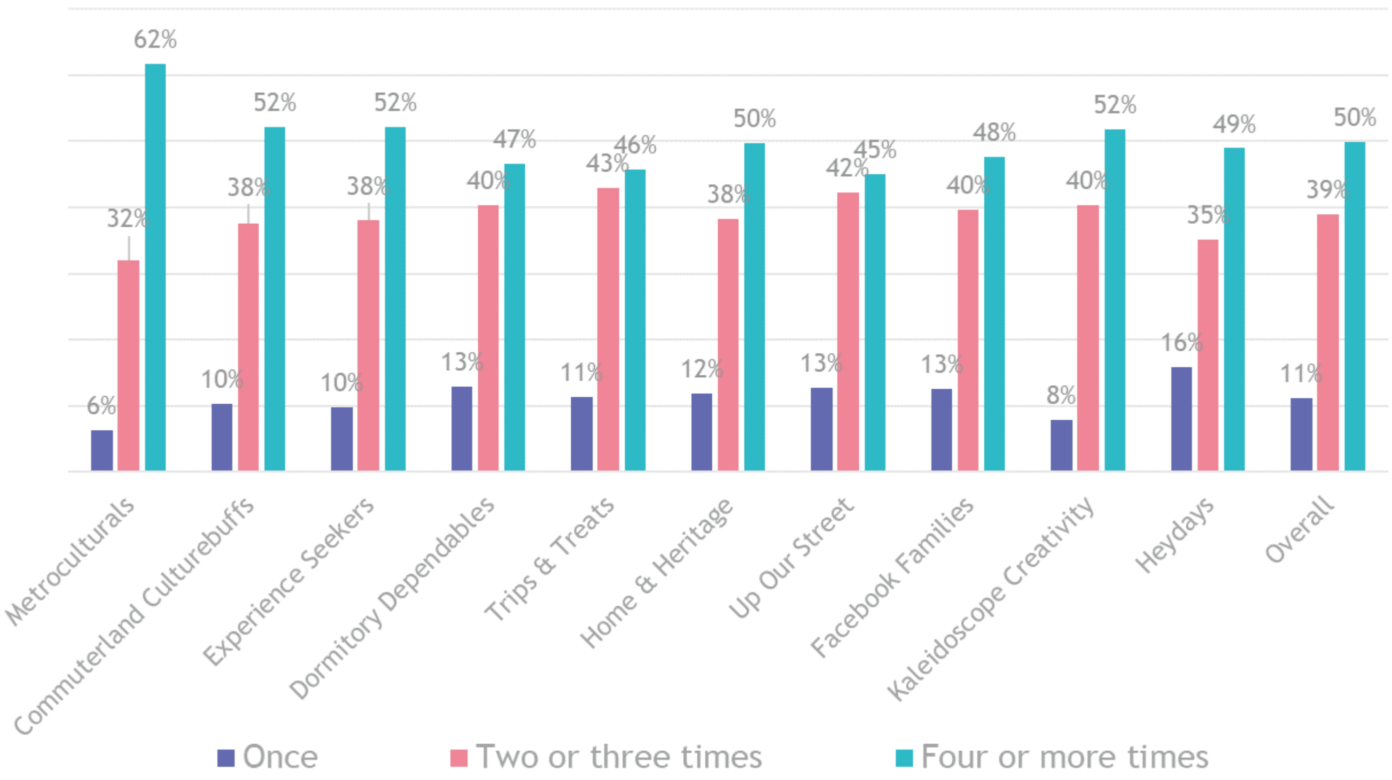
Q. 40 Interested in Culture Online?

Q. 46 Attitudes re Future Culture Online, cf. In Person?

How Often Watched Cultural Content Online During COVID

Among all groups, those who *had* watched online were most likely to have watched 'four or more times' since venues closed (although only narrowly for Up Our Street, and Trips & Treats): i.e. most who *had* watched, did so repeatedly.

Metroculturals were highest at 62%: 10% more than any others.



*Q: "How MANY Times Have You Engaged With Culture ONLINE Since Cultural Venues Closed…?"

ONLINE

IN PERSON

Q. 11 Prev. Frequency of Attendance?

Q. 17 Attended Already (Since COVID)?

Q. 23 Booked New Events?

IF NO:

Q. 29 How Feeling About Attending?

Q. 15* In Future Attend More/Less?

Q. 16* In Future Spend More/Less?

*BASELINE ONLY

ONLINE

Q. 36 Watched Culture Online?

IF YES [Since COVID]:

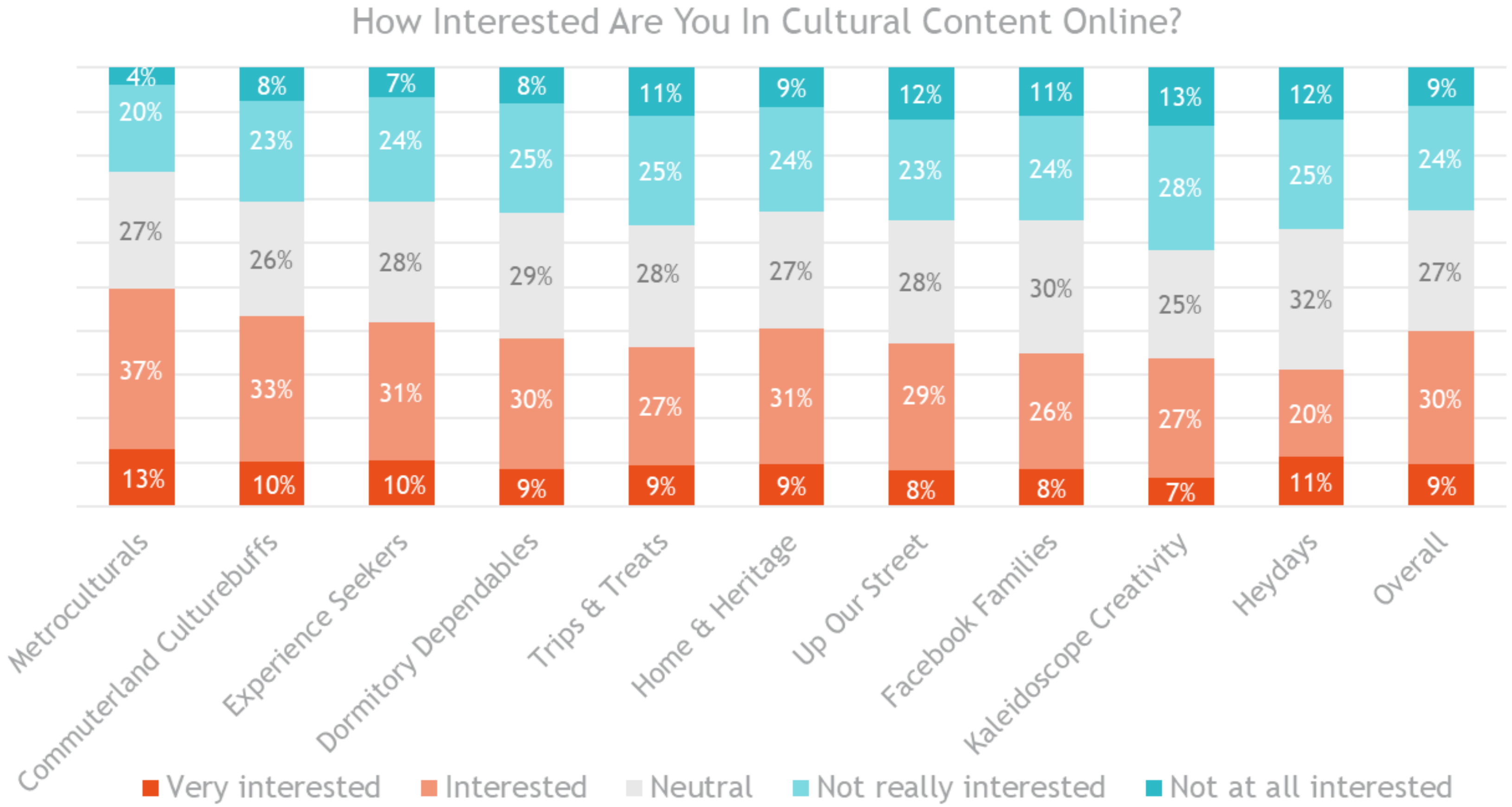
Q. 37 How Many Times?

Q. 40 Interested in Culture Online?

Q. 46 Attitudes re Future Culture Online, cf. In Person?

Interest in Culture Online

Within this engaged audience, Metroculturals were most enthusiastic about online culture, with 50% interested or very interested. For all groups apart from Heydays, over a third are at least interested.

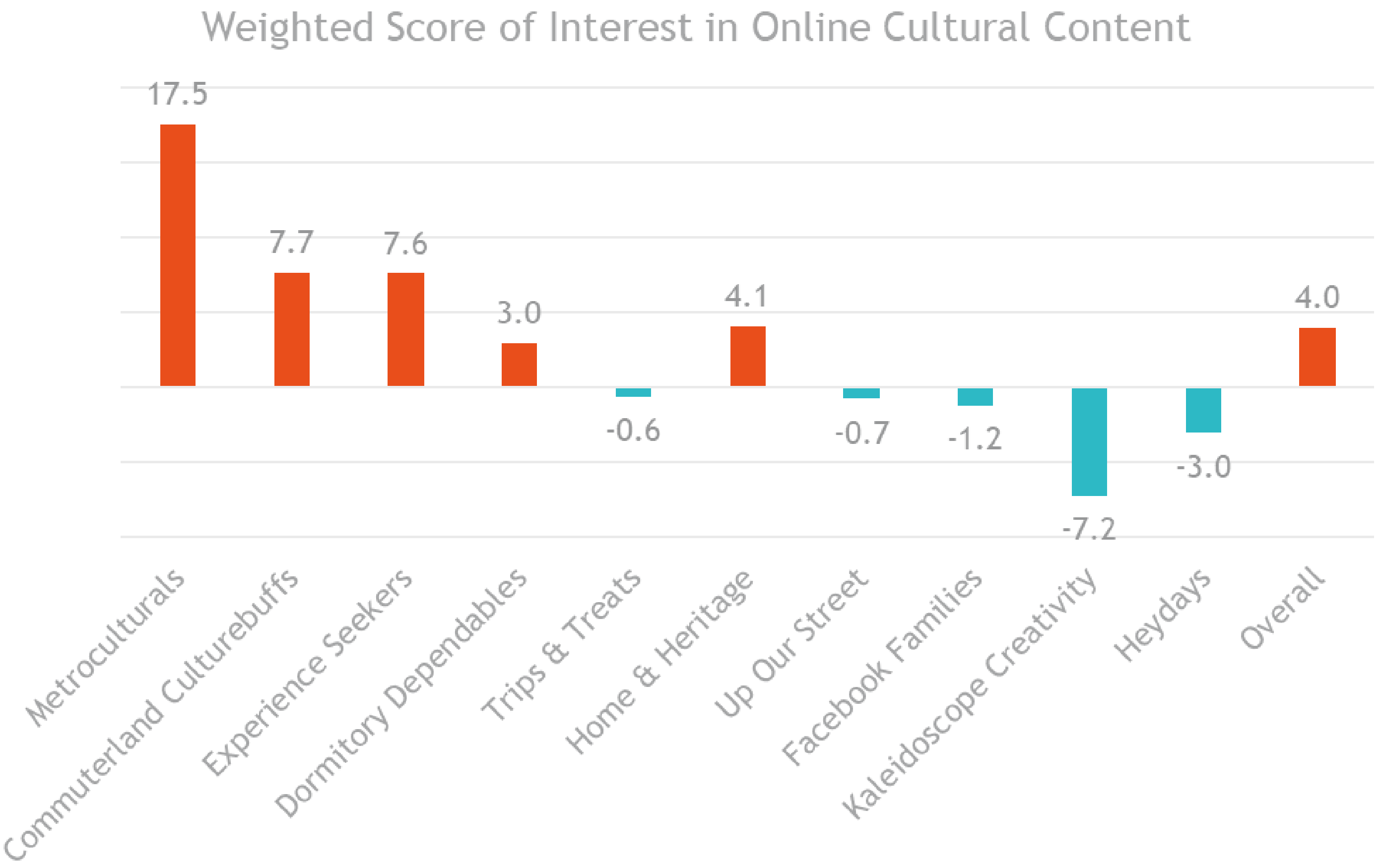


ONLINE

Interest in Culture Online

Using a weighted score*, the greater interest of Metroculturals is evident, with Commuterland Culturebuffs and Experience Seekers next highest (suggesting that it is interest in culture generally, rather than digital specifically, that is driving responses).

*The weighted score is calculated by allocating weights to response percentages: -1 (not at all interested), -0.5 (not really interested), 0 (neutral), 0.5 (interested), +1 (very interested) and totalling (x100).



ONLINE

the audience agency

I N PERSON

Q. 11 Prev. Frequency of Attendance?

Q. 17 Attended Already (Since COVID)?

Q. 23 Booked New Events?

IF NO:

Q. 29 How Feeling About Attending?

Q. 15* In Future Attend More/Less?

Q. 16* In Future Spend More/Less?

*BASELINE ONLY

ONLINE

Q. 36 Watched Culture Online?

IF YES [Since COVID]:

Q. 37 How Many Times?

Q. 40 Interested in Culture Online?

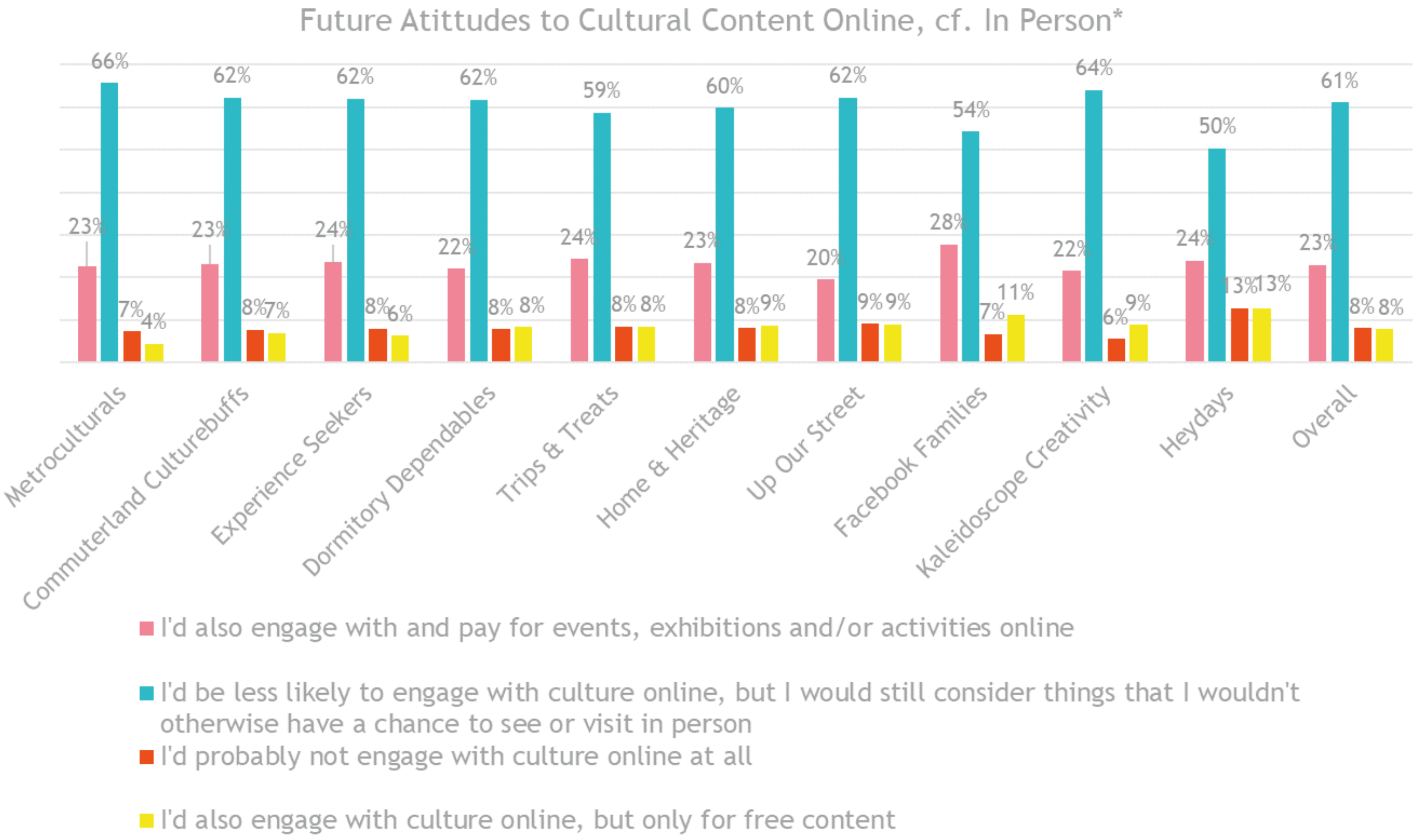
Q. 46 Attitudes re Future Culture Online, cf. In Person?

Attitudes to Future Culture Online, cf. In Person

Future attitudes are similar across segments of this highly-engaged audience, with 1/5 to 1/4 of each likely to engage with and pay for online content, The majority (1/2 to 2/3) are less likely, but prepared to consider it. Only 1/12 said they probably wouldn't engage at all.

O N L I N E

*Q: "Which of the following would most closely describe your attitude to online culture once you are attending a suitable variety of live performances in person?"



Summary and Conclusions

Summary by Segment

IN PERSON

ONLINE

Metroculturals

Highest engagement before, during and (expected) after COVID – also more likely to expect to spend more rather than less in future.

Most digitally engaged: have watched most both before and during COVID, are most interested in online content and most likely to pay for future content (and least likely to say they'd only engage with free content).

Commuterland Culturebuffs

High engagement before, but relatively low returns and low future bookings. For in-person engagement, the vaccine/tests are key: they are least likely to say they will return 'as soon as venues are open'.

They are high for interest in online culture and for having engaged (but only a little above average for frequency, or likely future engagement).

Summary by Segment

I N

P E R S O N

O N L I N E

Experience Seekers

High engagement before and second-highest proportion having returned already. Those who haven’t booked already are most likely to say that they’ll return as long as social distancing and other measures have been put in place. More likely to expect to spend more in future.

Highly digitally engaged: particularly likely to have watched both before and during COVID, but not esp. frequently.

Dormitory Dependables

Average engagement before, average return and average future bookings: this group are strikingly close to the average on most measures, if perhaps skewing higher for in person than online engagement (although a small majority have engaged with culture online, albeit at below-average frequency).

Summary by Segment

IN PERSON

ONLINE

Trips & Treats

Moderate but infrequent engagement before and on balance expect to attend and spend more in future. A majority are not digitally engaged with cultural content and weren't before COVID, though there's some indication they've had more average online engagement since.

Home & Heritage

Average engagement before, but less likely to have returned: this group are also among the least likely to have booked future events. Those in this group who haven't booked yet are strongly dependent on vaccines/tests to engage at previous levels and among the least likely to say that they will return as soon venues are open.

Their digital engagement is fairly average.

Summary by Segment

IN PERSON

ONLINE

Up Our Street

With lower proportions previously engaging four or more times a year (but plenty engaging 2-3 times), those who haven't booked yet from this group are both more positive about attending as soon as is possible and more likely to 'wait until I can attend as usual'. Similarly, if they had watched online content, it was more likely to be infrequently. They were least likely to say they would engage and pay *both* online and in person.

Facebook Families

This group are less likely to have attended frequently previously, but are *more* likely to have booked multiple times for the future: they are positive about returning and are more likely to expect to attend more than less in future. Most haven't engaged with cultural content online, but are relatively likely to say that they might in future, whether paid (alongside in person) or free.

Summary by Segment

IN PERSON

ONLINE

Kaleidoscope Creativity

With fairly infrequent previous engagement, this group are relatively likely to have returned already (third highest), reflecting greater positivity about attending in future.

They are more likely to expect to spend more, rather than less. Fewer of this group than any other say that they are 'unlikely to engage with digital culture at all in future' (but tend towards free content).

Heydays

With infrequent previous engagement, this group are also less likely to have returned or booked for the future. Vaccines and tests are important for this group to attend in future, or for things to have 'returned to normal'.

They are least interested in online culture, have low frequency of engagement and are most likely to say that they wouldn't engage with digital in future, and if they did, it would only be for free.

Overall Conclusions

Respondents to this survey are highly engaged compared to these segments in the wider population, but a similar pattern is evident here to what we've seen elsewhere:

- Some segments were, are and will be highly engaged in person – and are also the most engaged digitally: Metroculturals and Experience Seekers.
- Some show future potential, esp. digitally, despite being lower engaged in person usually: Kaleidoscope Creativity and (to a lesser extent) Facebook Families (though potential and openness to attend or engage online may not be matched with enthusiasm for current offers).
- Some remain average, on and offline (Dormitory Dependables, Trips & Treats).

Overall Conclusions

Respondents to this survey are highly engaged compared to these segments in the wider population, but a similar pattern is evident here to what we've seen elsewhere:

- Some – with more traditional tastes - have dropped in potential engagement (Commuterland Culturebuffs, Home & Heritage): the former will still be important, but less than before. There is moderate opportunity to keep them both engaged via digital.
- Others, esp. older and lower engaged in the first place, are harder to engage, on or offline (Up Our Street and esp. Heyday).

Overall Conclusions

This core surveyed audience matching trends across the wider population suggests:

- A greater dependence on (or super-serving of) highly educated, urban and omnivorous segments like Metroculturals and Experience Seekers;
- Particular challenges for regions and organisations heavily dependent on Commuterland Culturebuffs / Home & Heritage, esp. in person, with a shift away from/particular threat to traditional art forms;
- Some new opportunities, esp. digitally, with previously lower-engaged groups like Kaleidoscope Creativity and Facebook Families, but with challenges;
- Risks of lower engaged segments engaging in even lower proportions (esp. Heyday).

Therefore…

- A short term opportunity to engage audiences with an appetite for more contemporary and innovative work and some lower-engaged groups (e.g. through Cultural Recovery Funding) may soon be followed by…
- A decisive moment, as vaccine roll-out and reductions in the pandemic take over, of whether older core audiences *do* return, as suggested (esp. as these groups have often been less hard-hit financially, but have already shown their reluctance to return early…)

If so, there is a clear path back for the sector to an *evolved* model.

If not, the combination of simultaneous disposable income and funding squeezes with loss of core audiences could mean a more radical retrenchment (alongside a watershed / generational shift in terms of cultural tastes).

For more about the Culture Restart Survey, including the methodology, visit: indigo-ltd.com/culture-restart-toolkit

For more about this analysis, as well as other research about audiences in the time of COVID, visit: theaudienceagency.org/bounce-forwards/covid-19-insights-original-research or email: oliver.mantell@theaudienceagency.org

the audience agency