What Are Audiences Thinking?

Findings from the COVID Cultural Participation Monitor

April 2021

CENTRE FOR CULTURAL VALUE

UKRI Arts and Humanities Research Council

Creative Industries Policy & Evidence Centre
Led by nesta

the audience agency

phf Paul Hamlyn Foundation

LOTTERY FUNDED
Supported using public funding by ARTS COUNCIL ENGLAND

Why Do Audiences Attend?

Cost of ticket

Time (other things not done)

Travel (time & cost)

Cost of/access to childcare

Comfy sofa

etc…

Fear of death and responsibility for the deaths of countless others

Interest in content

Recommendation

Someone to go with

Persuasive marketing

Social/special occasion

etc…

12 months’ built up pressure from not being able to go out *(please-I’ll-go-to-anything-I-just-need-to-get-out-of-the-house…)*

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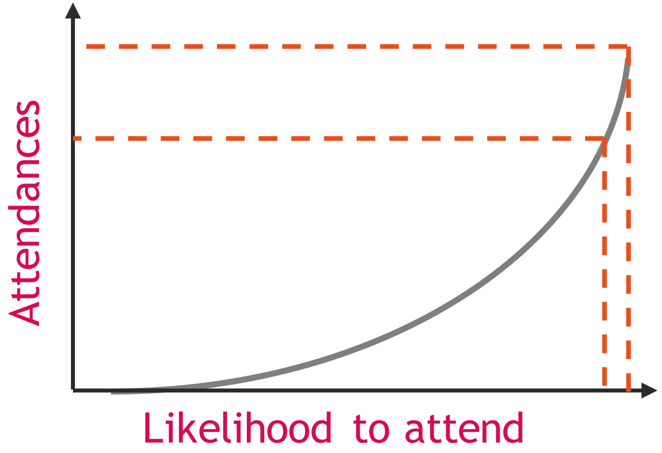
Why Do Audiences Attend?

All these complex factors still apply,

but with *massive* confounders

Most people are attenders,

but…



and not the same for everyone: segmentation is *essential*

76%

engaged in arts in last 12 months

(Taking Part 19/20)

[61% 3+ times]

To Understand What Audiences Are Thinking…

What've they been doing culturally?

- In Person
- Participatory
- Online

Do they have more or less money?

Are they missing live performances?

How do they feel about safety?

Are they ready to come back?

About the COVID Cultural Participation Monitor

A study of the impacts of COVID on cultural engagement, based on a longitudinal, nationally-representative online panel survey

Wave 1: 6,055 responses, Oct-Nov 2020

Wave 2: 1,503 responses, Feb 2021

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

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

Background: AHRC-funded, as part of Centre for Cultural Value's *COVID-19: Impacts on the cultural industries and the implications for policy*.

Strands re sector impact (workforce & case studies); public impact (Monitor and social media); policy impact (UK & in the Greater Manchester ecosystem)

About the COVID Cultural Participation Monitor

What it includes:

- Physical/digital/creative engagement with culture
- Wider leisure habits
- Profile and attitudes

For before, during and after COVID

(inc. intentions to engage and attitudes re mitigations).

For overall findings from Wave 1, see the COVID-19 Cultural Participation Monitor Summary Report

audience spectrum

Population segmentation
using multiple data sources
based specifically on arts
and cultural interests

Engagement During COVID

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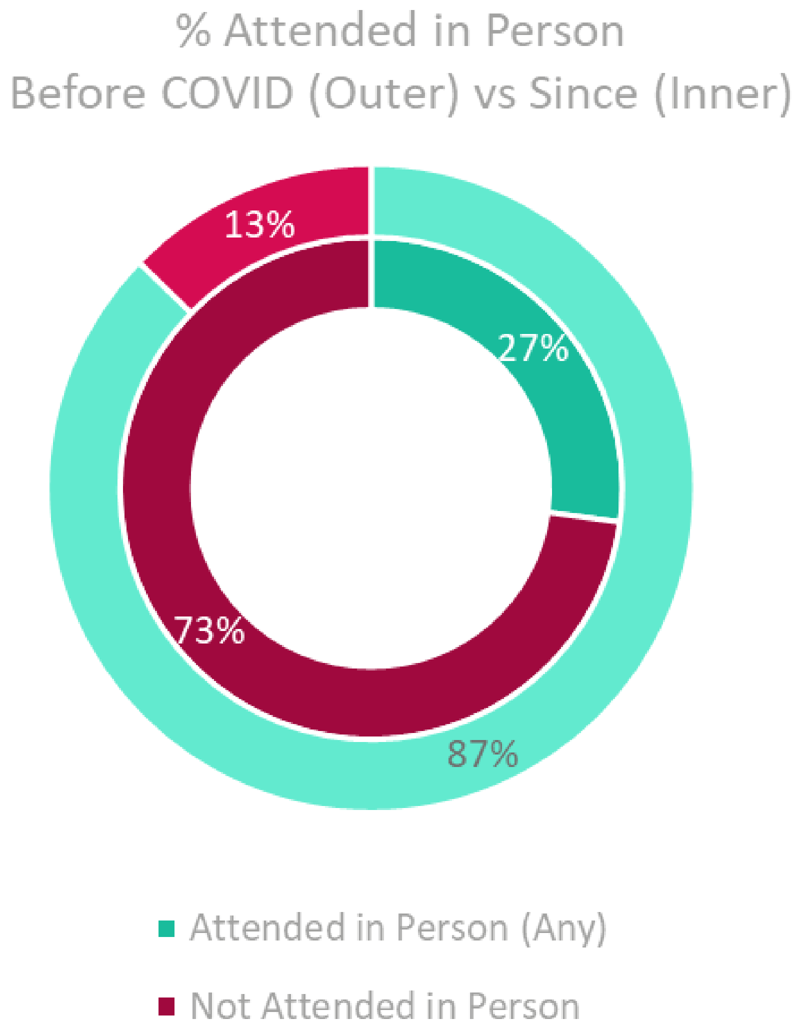
In Person Attendance

27% of the population have done any in person cultural activity during the pandemic

(only 19% of those 45+, but 36% of those younger).

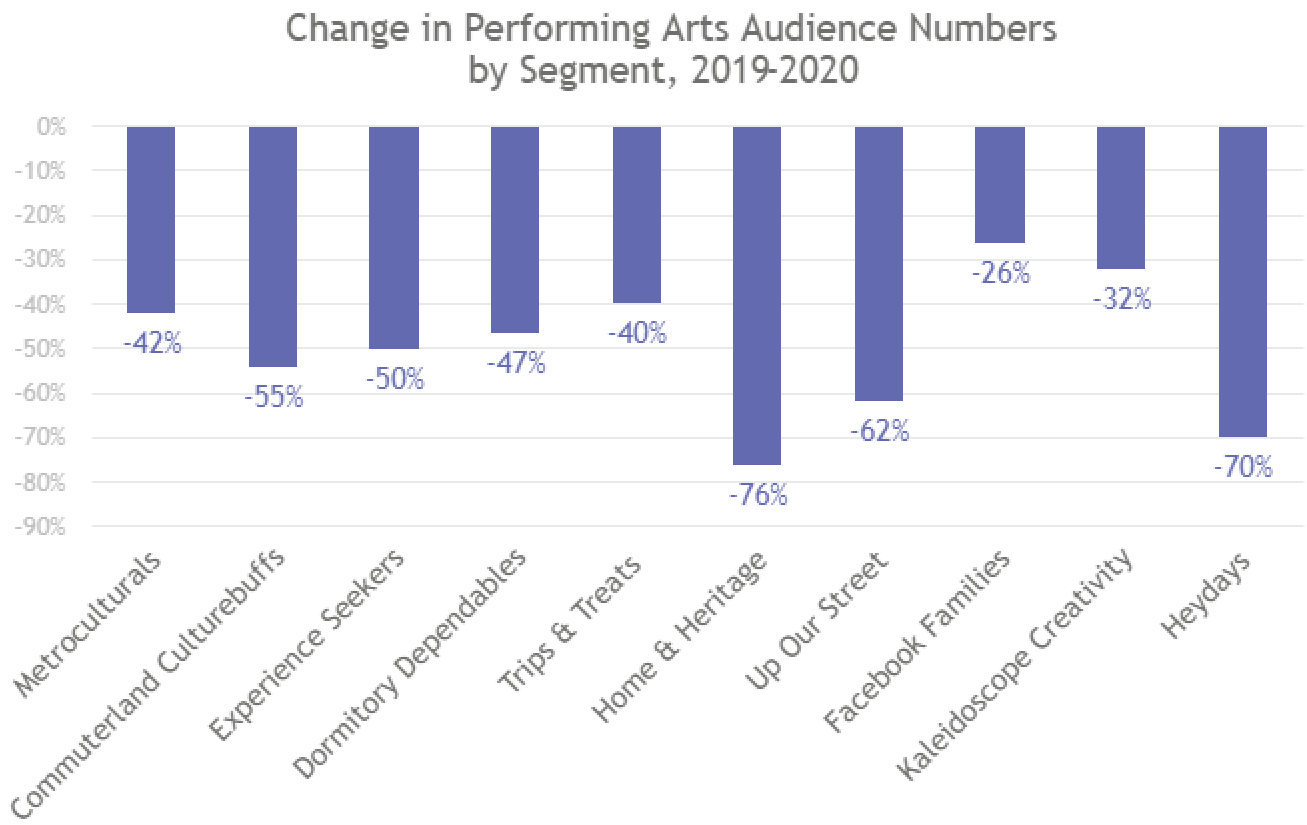


Who Came Back Last September?

From: Between Lockdowns analysis

We profiled audiences at a sample of venues between Lockdowns 1 and 2 (specifically Aug 17th to Oct 11th) and compared them to the same venues a year earlier.

Total sales had dropped (46k -> 22k), but notably the profile also changed.



Participation

Change in Participation

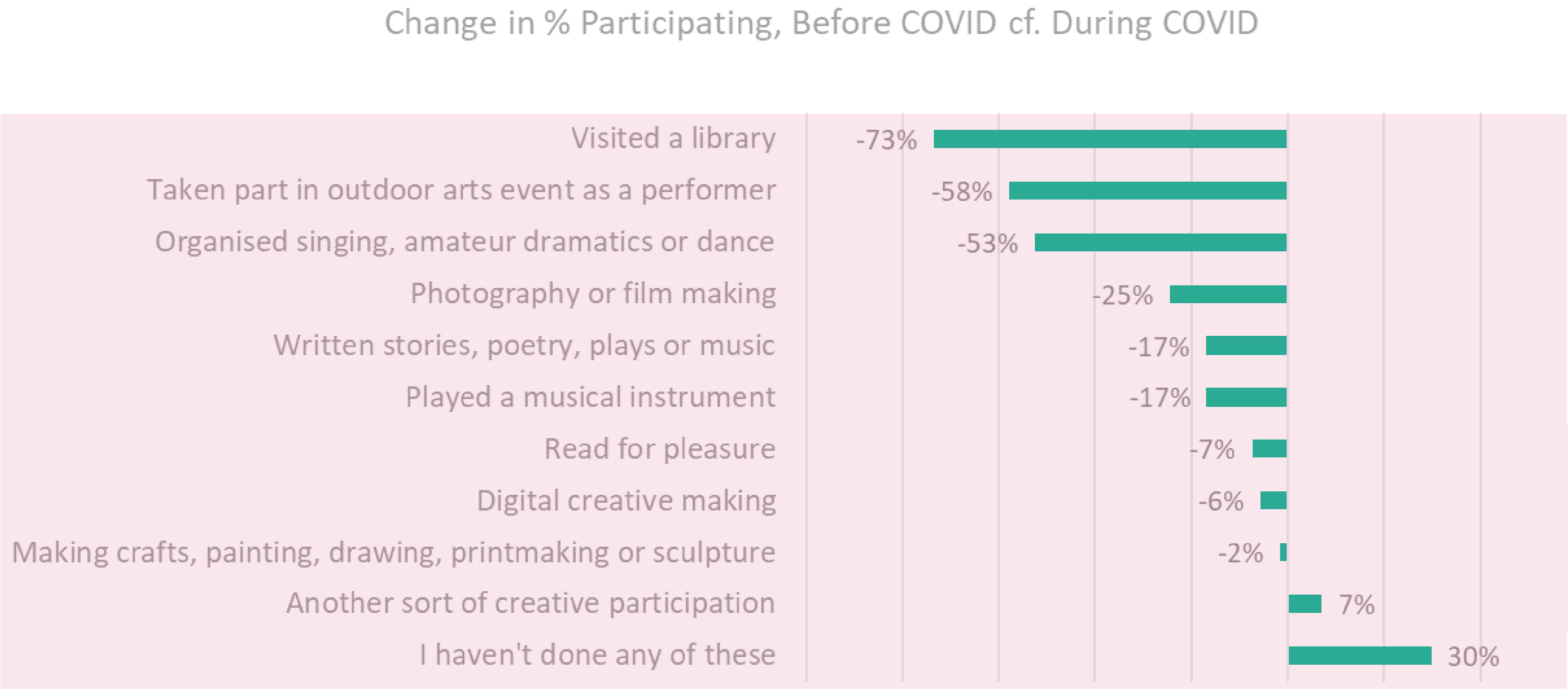
Drop from

69%

before to

60%

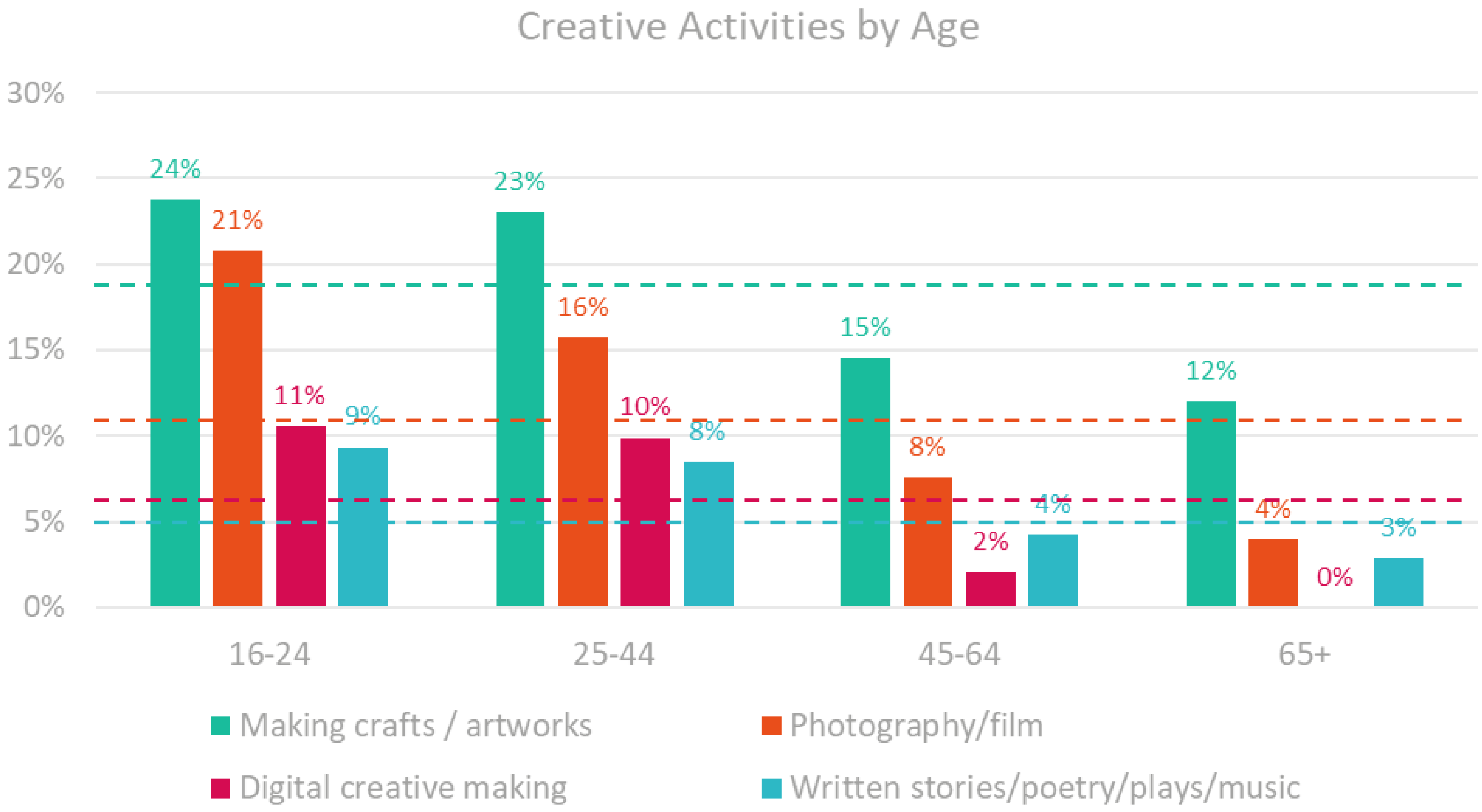
during had done any



76%

very or quite likely to do one of these in the next couple of months

Participation Before COVID



Avg:

18%

11%

6%

5%

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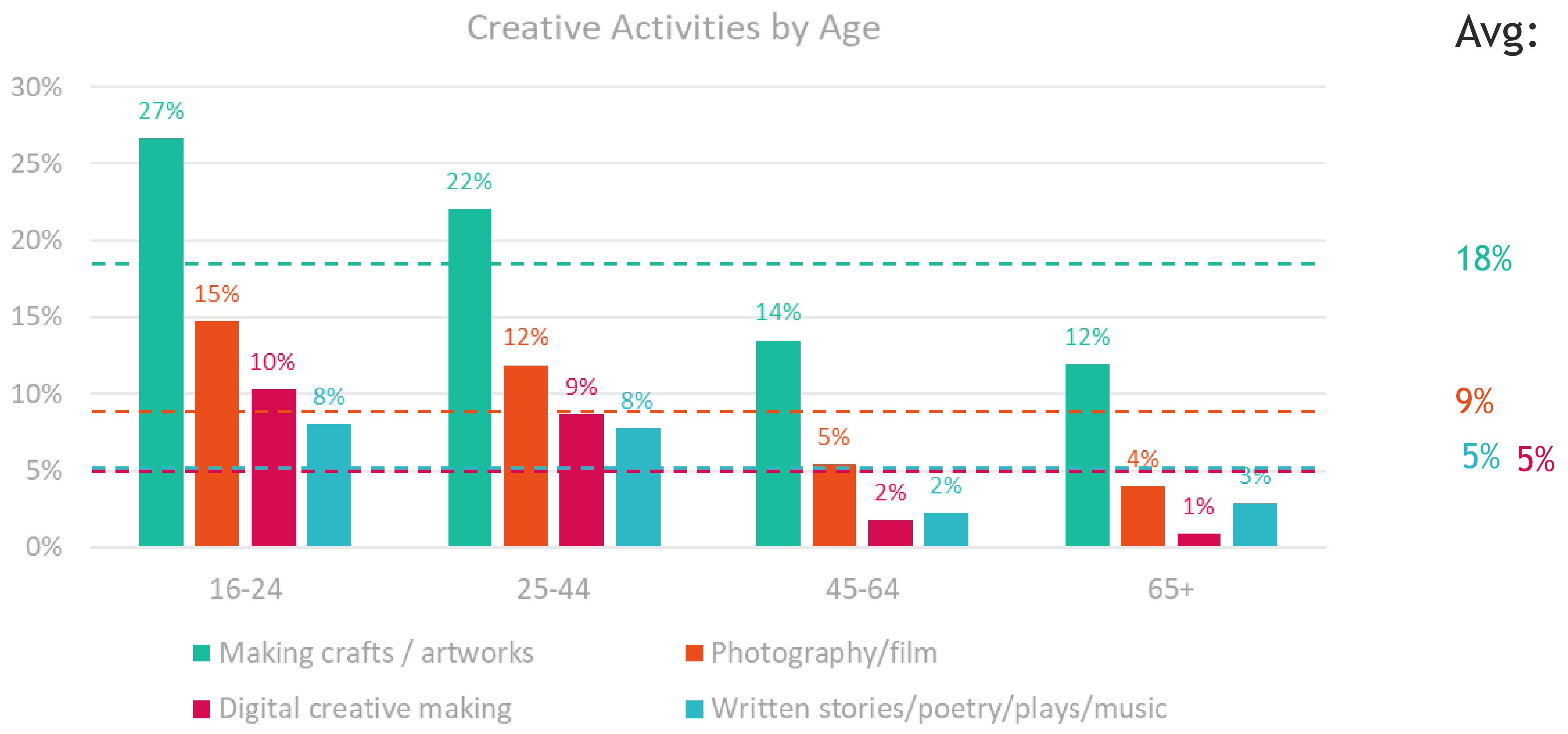
Participation During COVID



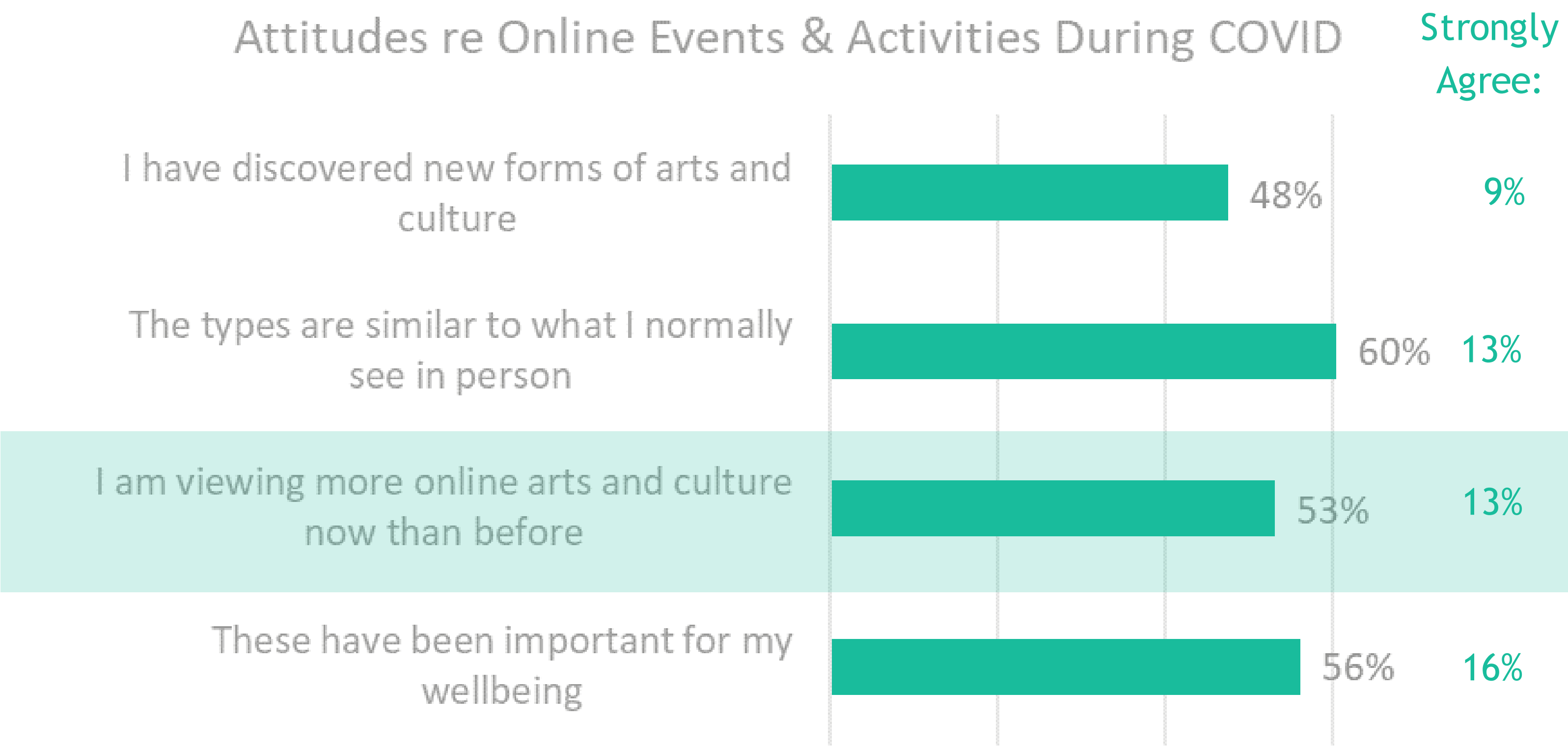
Online Engagement

41% ...had done online cultural activity in the year before COVID.

43% ...have done online cultural activity during the pandemic.

47% ...say they expect to do online cultural activity even once there is no risk from COVID.

Although about the same % of the population are engaging with arts and cultural content online, **53% of those are engaging more.**



*Full Answers, re 'Strongly agree or agree':
I have discovered new forms of arts and culture online
The types of art and cultural content that I am viewing online are similar to what I would normally see in person
I am viewing more online arts and cultural content now than I did before the Covid-19 pandemic
These online events and activities have been important for my wellbeing during the Covid-19 pandemic

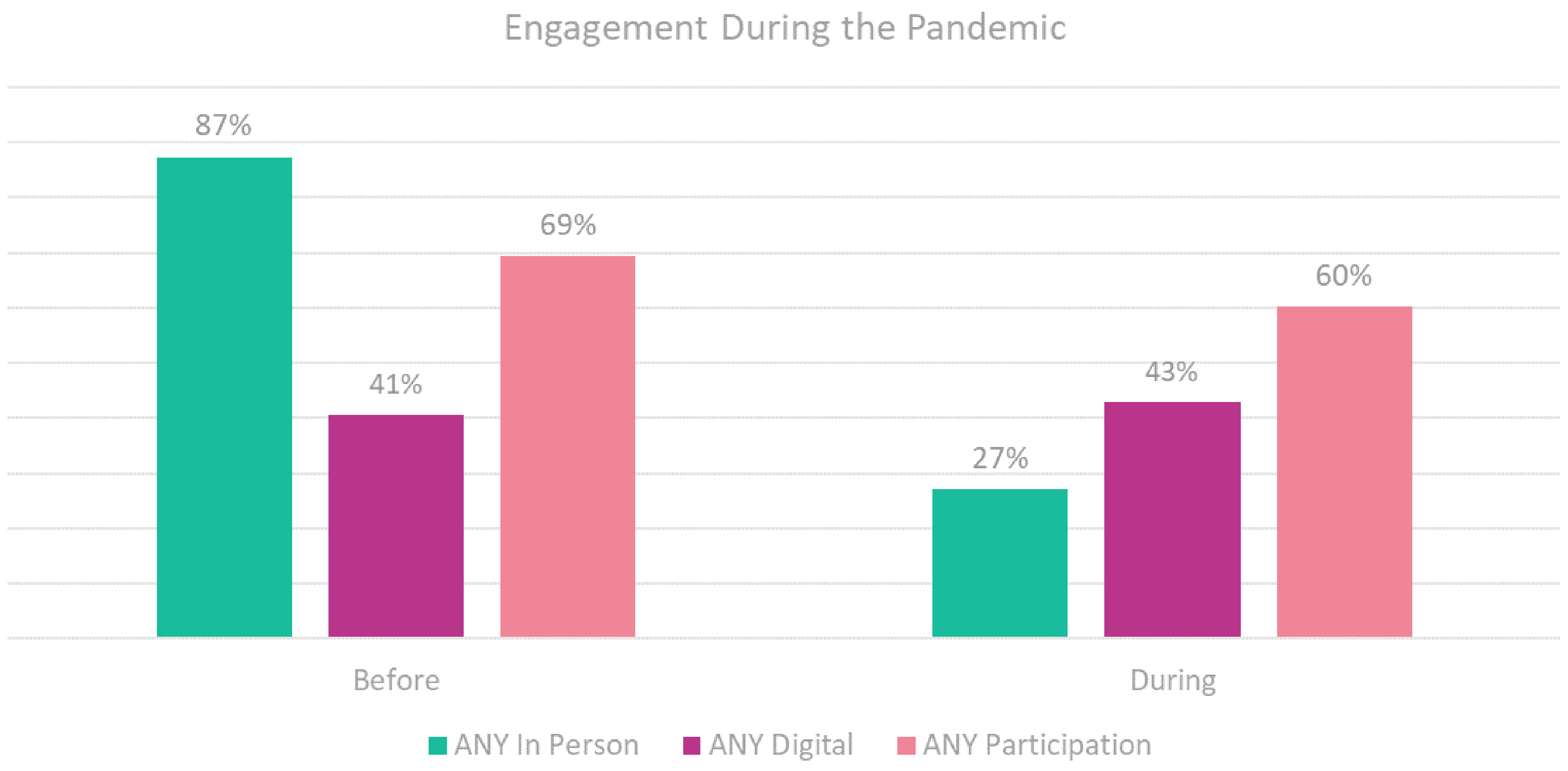
Summary of Engagement

Summary of Engagement

Down 69% for 55-64s, but only 53% for 25-34s

Up 7% up for 65-74s

Down 13% for 16-24s and 45-54s



Financial Impact of COVID

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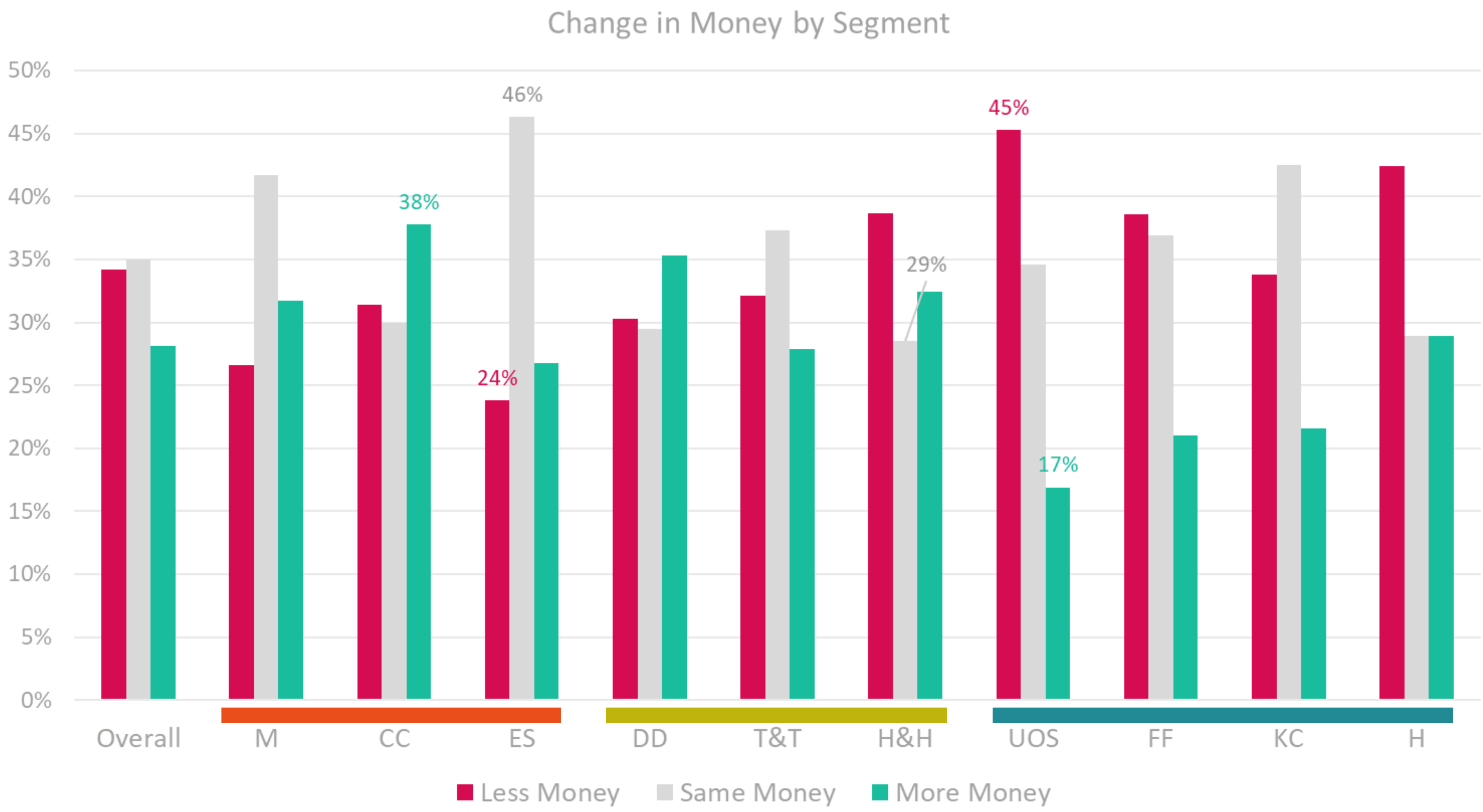
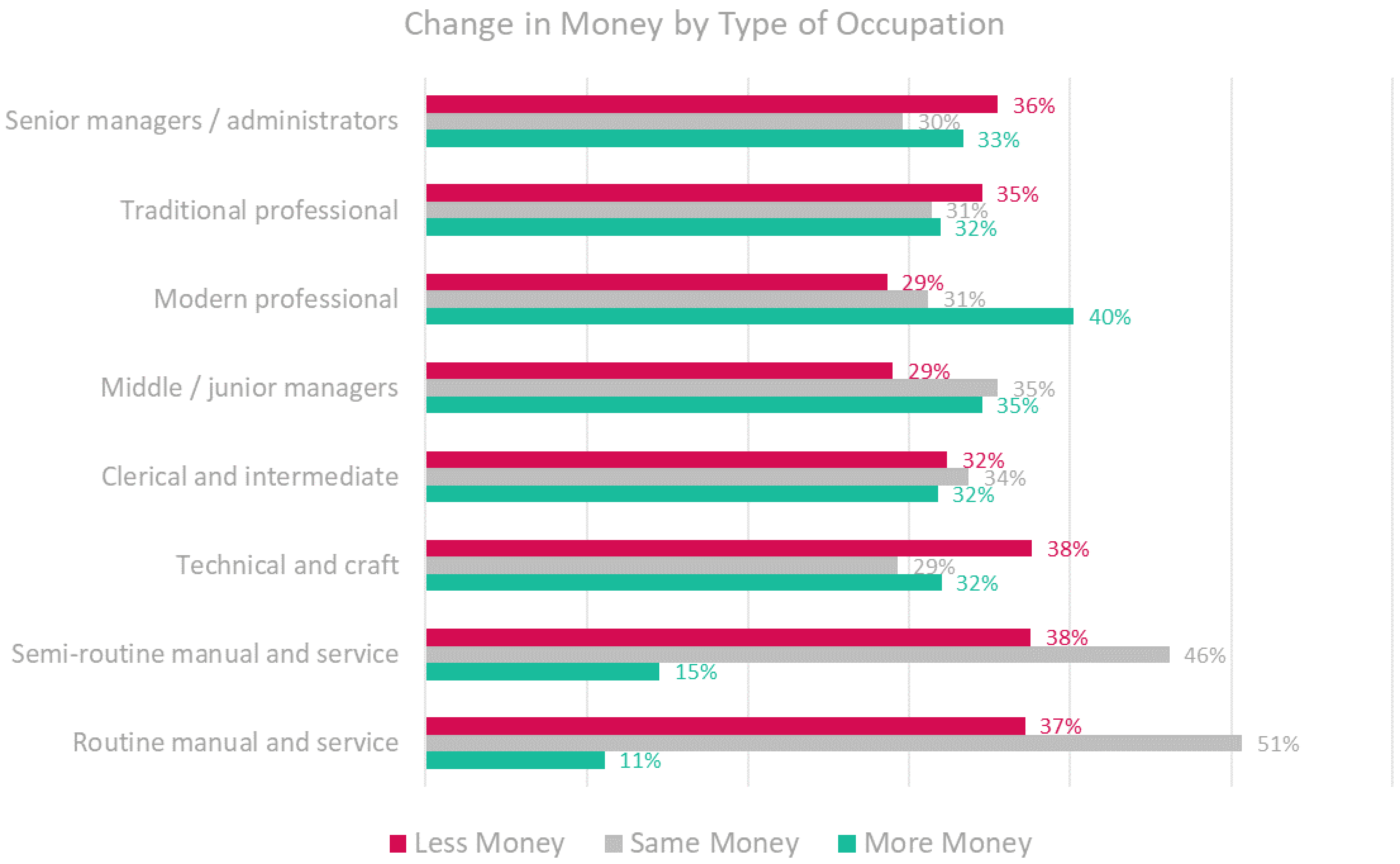
Higher Engaged:
M = Metroculturals
CC = Commuterland Culturebuffs
ES = Experience Seekers

Moderately Engaged:
DD = Dormitory Dependables
T&T = Trips and Treats
H&H = Home & Heritage

Lower Engaged:
UOS = Up Our Street
FF = Facebook Families
KC = Kaleidoscope Creativity
H = Heydays



Those in Semi-routine and Routine manual occupations are much more likely to have seen reductions in money, rather than increases.



More Money

White:	24%
Mixed/Multiple:	22%
Asian/Asian British:	16%
Black/Black British:	16%

[Wave 1 data]

Without disability:	30%
With disability:	24%

75+:	37%
65-74:	41%
55-64:	32%
45-54:	27%
35-44:	21%
25-34:	26%
16-24:	19%

Less Money

Asian/Asian British:	46%
Mixed/Multiple:	44%
Black/Black British:	43%
White:	33%

[Wave 1 data]

With disability:	37%
Without disability:	34%

16-24:	42%
25-34:	40%
35-44:	43%
45-54:	34%
55-64:	37%
65-74:	22%
75+:	16%

Missing Live Performances

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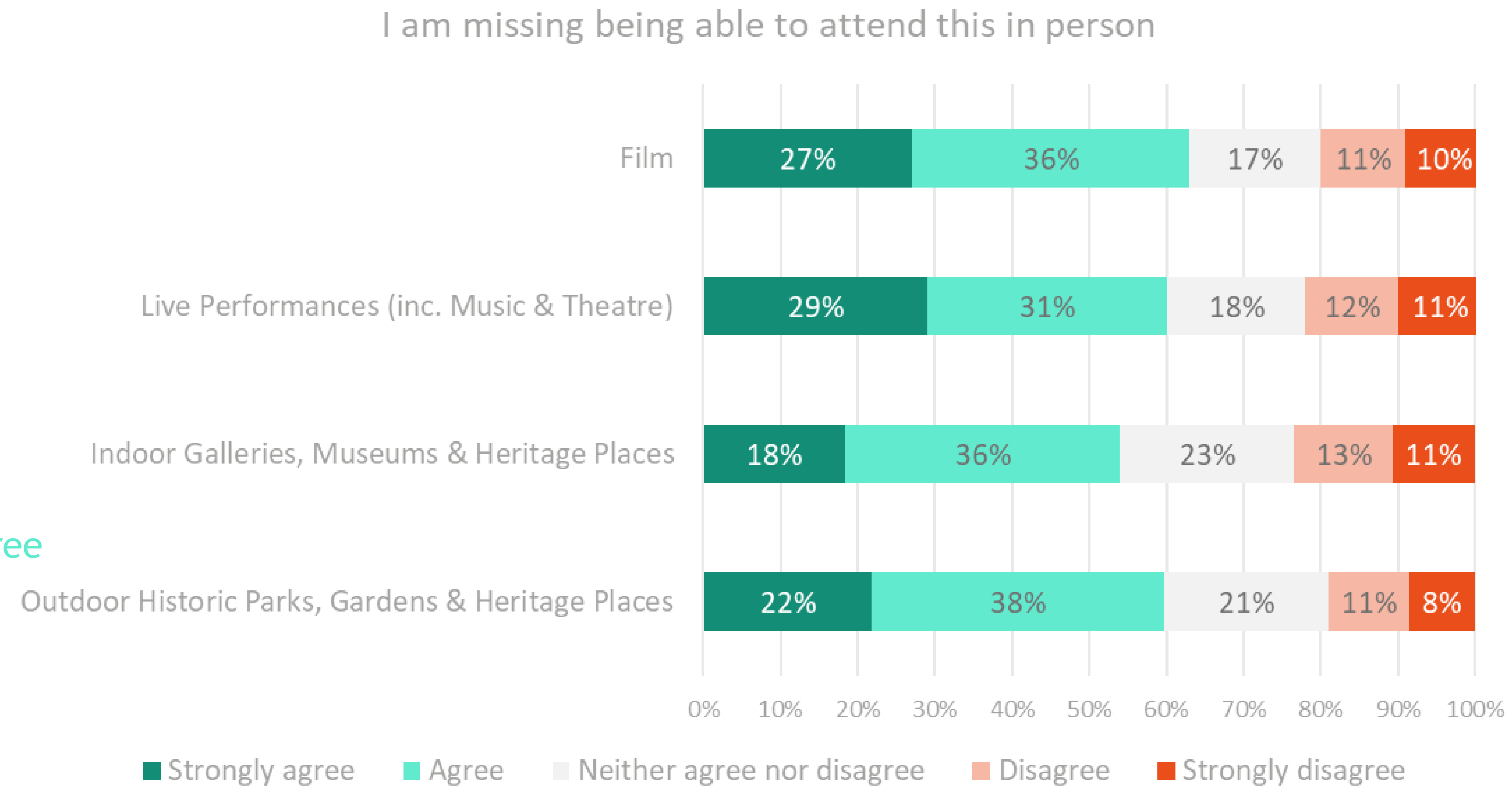
Overall:

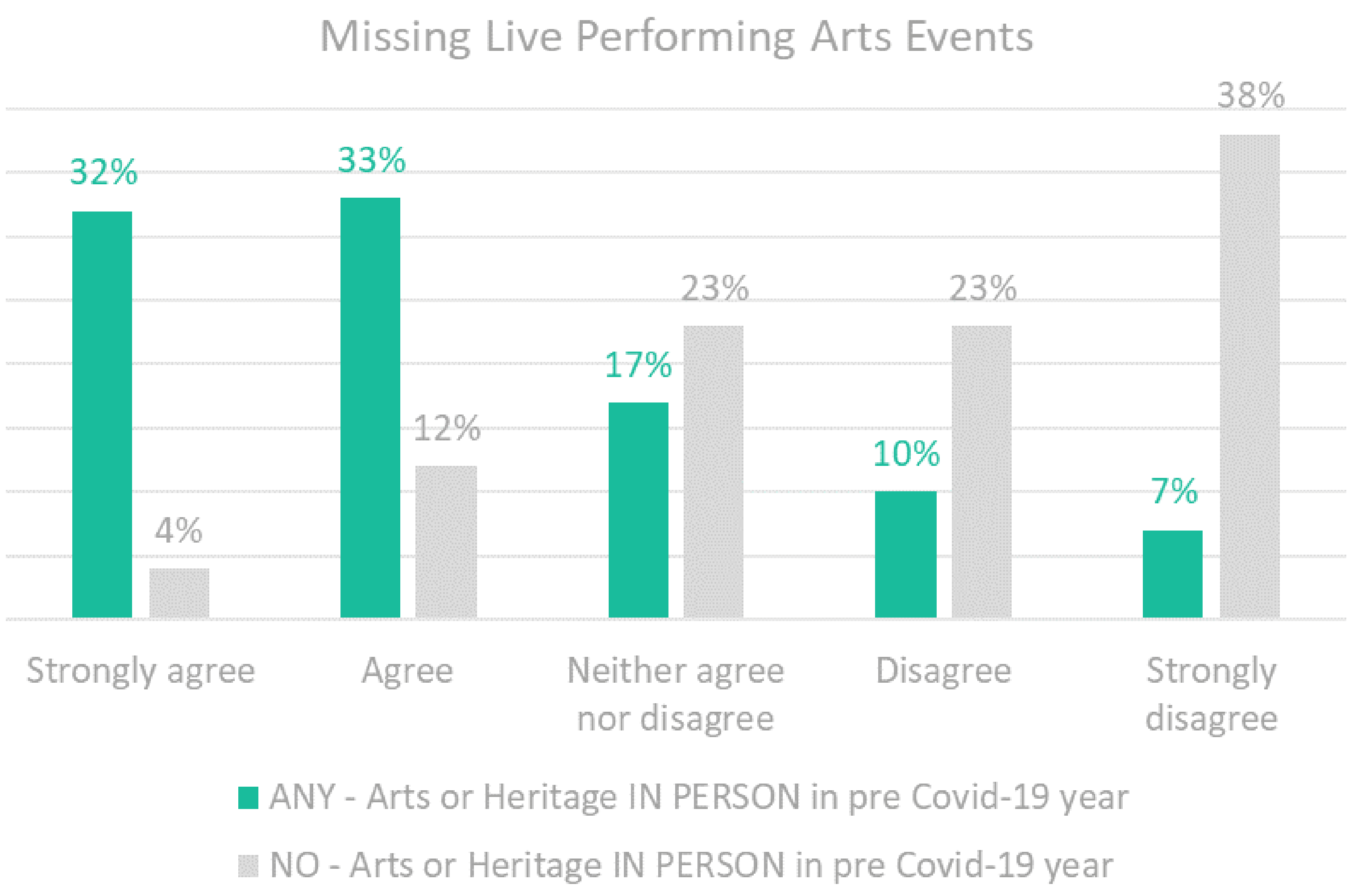
77%

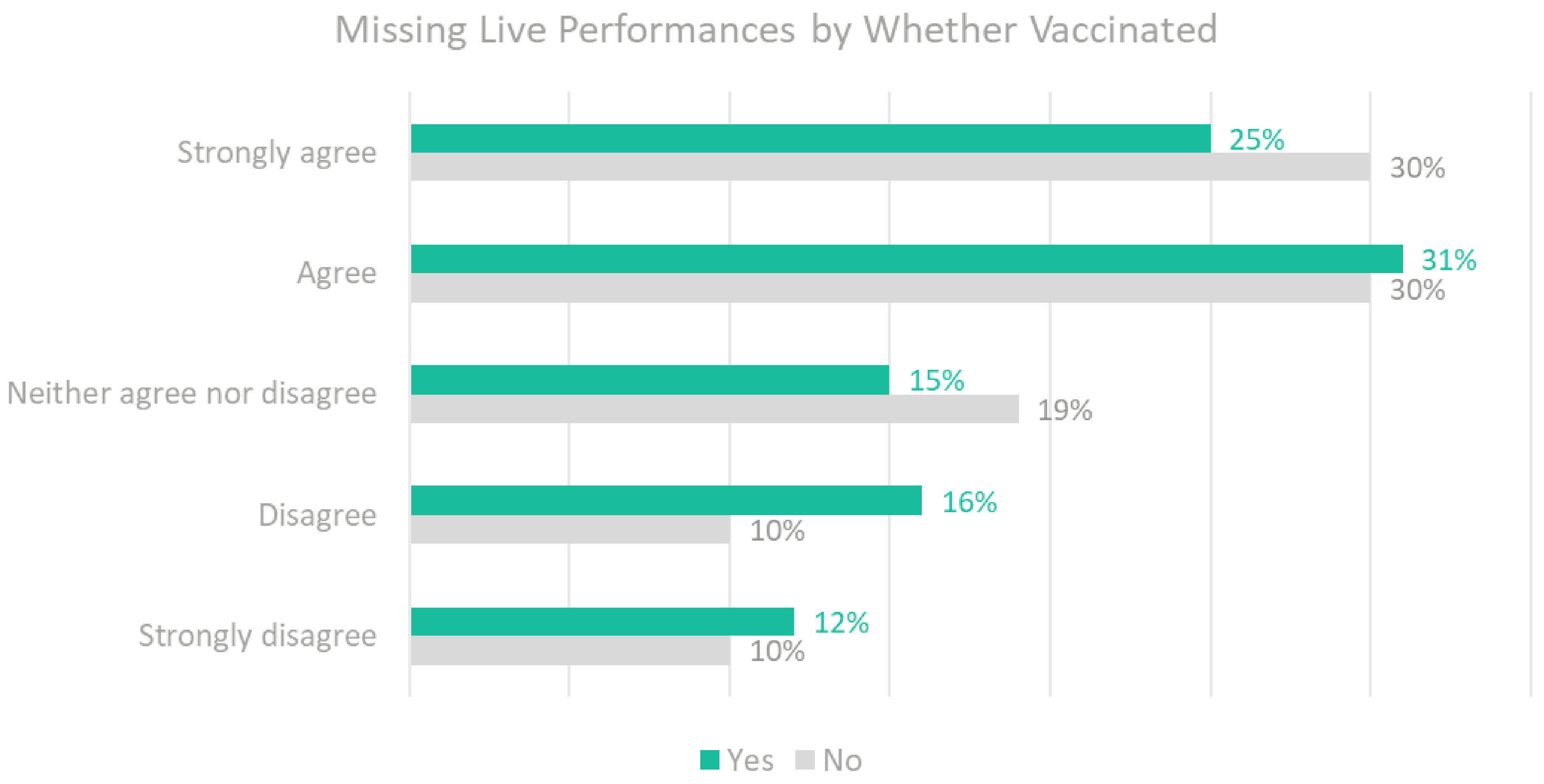
Strongly agree

92%

Agree/Strongly agree




Missing Live Performing Arts Events
32%
4%
33%
12%
17%
23%
10%
23%
7%
38%
Strongly agree
Agree
Neither agree nor disagree
Disagree
Strongly disagree
ANY - Arts or Heritage IN PERSON in pre Covid-19 year
NO - Arts or Heritage IN PERSON in pre Covid-19 year


Missing Live Performances by Whether Vaccinated
Strongly agree
Agree
Neither agree nor disagree
Disagree
Strongly disagree
25%
30%
31%
30%
15%
19%
16%
10%
12%
10%
Yes
No

COVID Safety and Willingness to Attend

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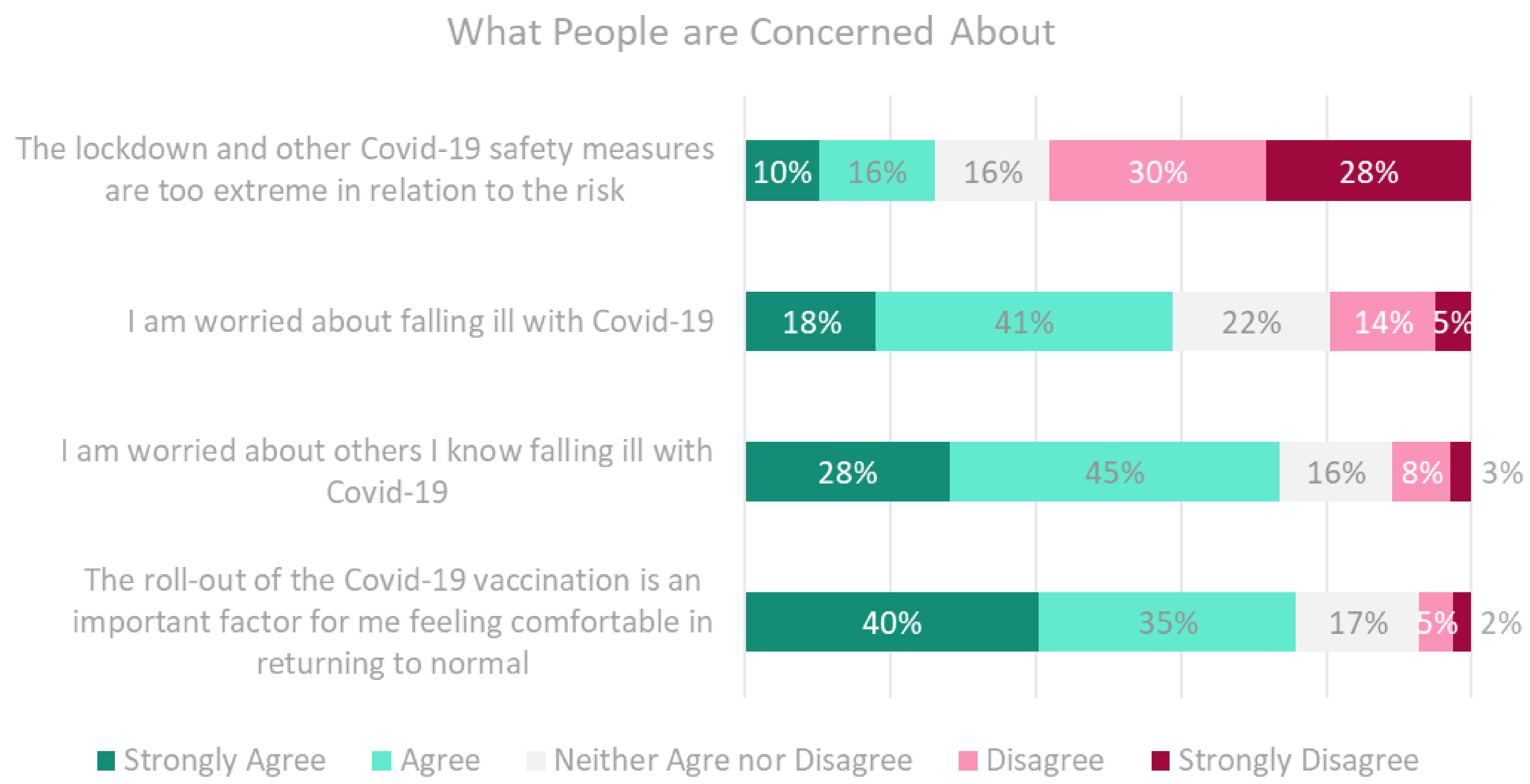

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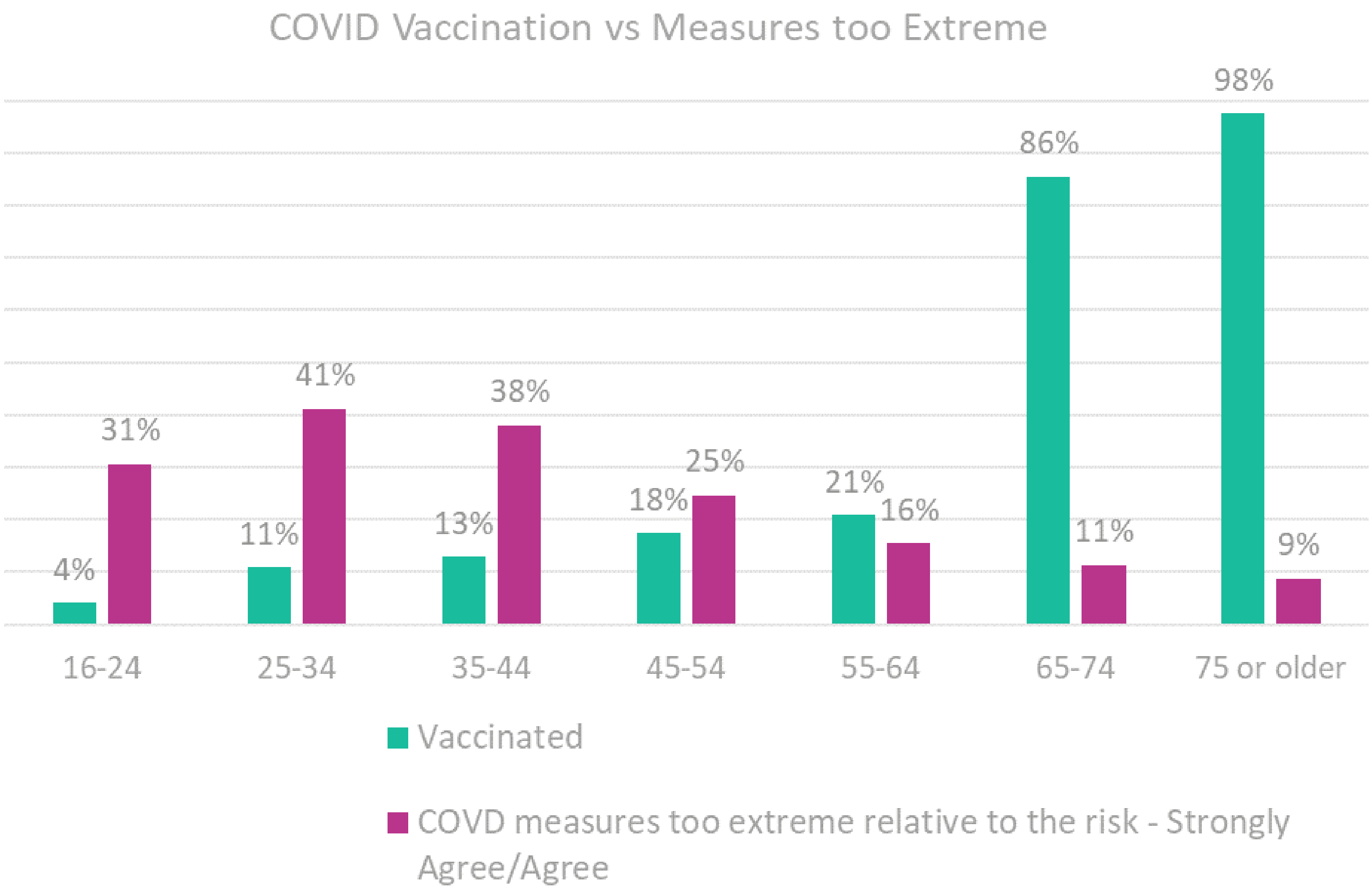
26%

think COVID measures have been too extreme

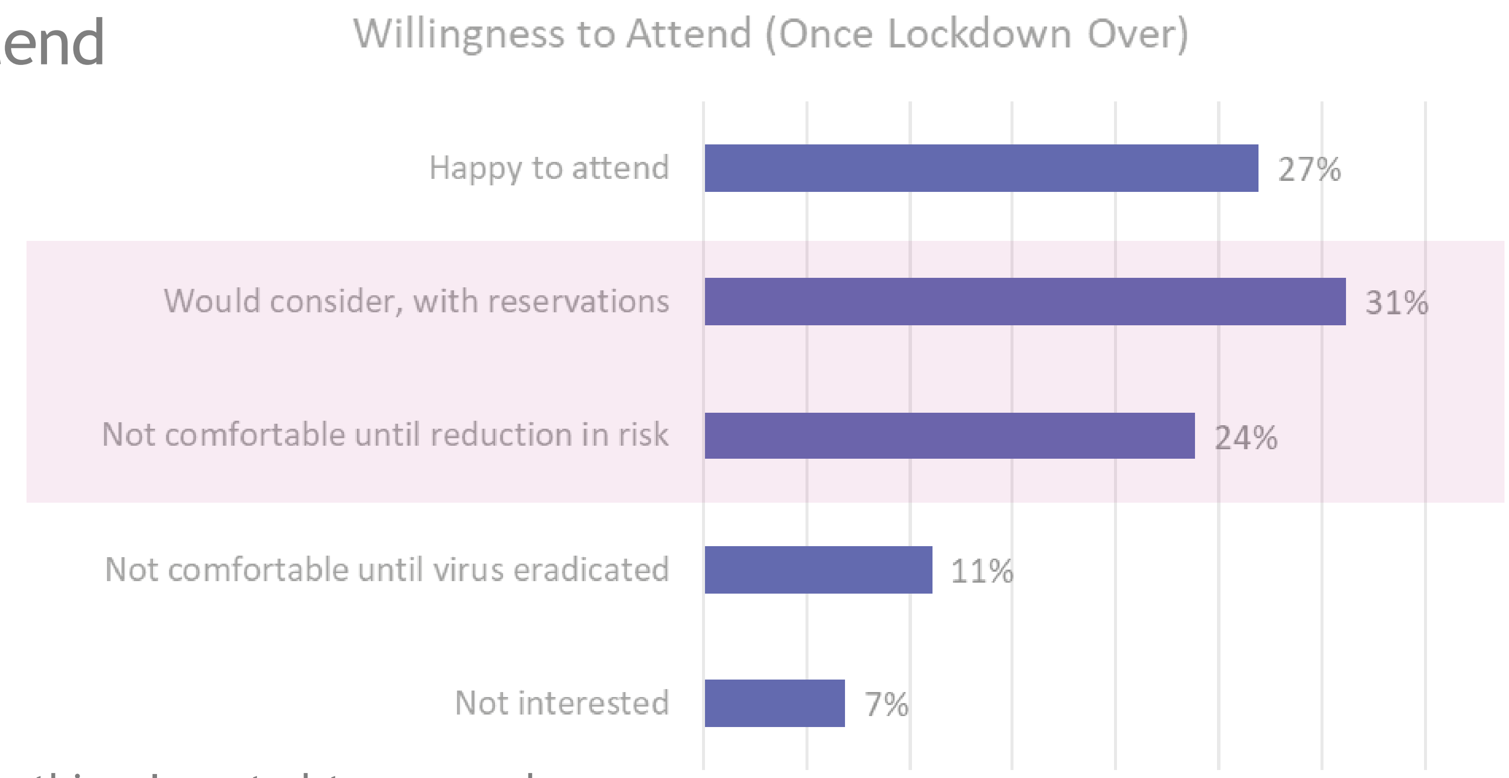


30%

had been vaccinated

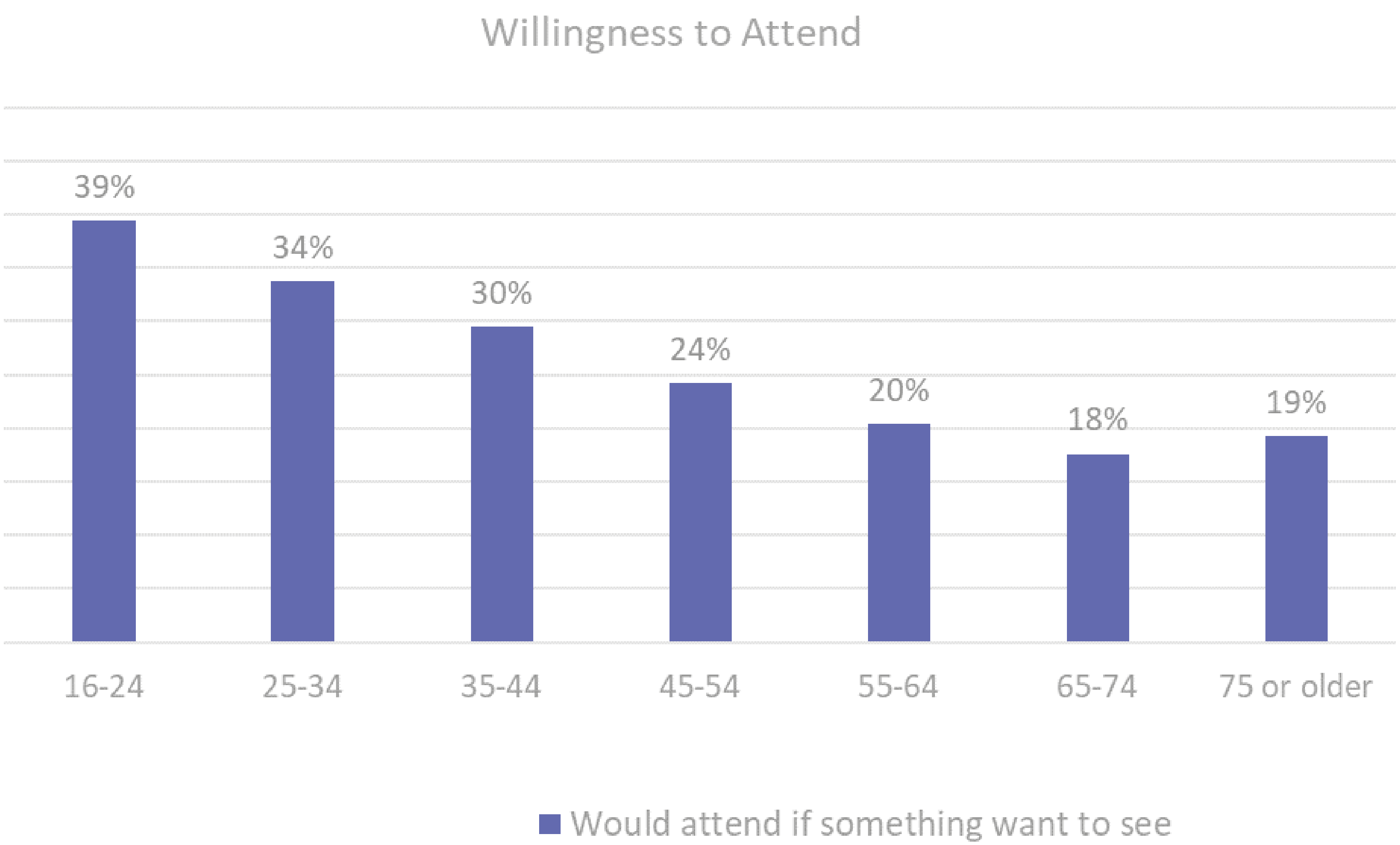
(as of mid Feb)

1 in 4 are already happy to attend
1 in 3 would consider it
1 in 5 wouldn't come



Middle 55% where persuasion needed…

*Full Answers:
I would be happy to attend if there was something I wanted to see or do
I would consider attending, but with some reservations about Covid-19 safety
I would not be comfortable with this until there are significant reductions in risk from Covid-19
I would not be comfortable until the virus is effectively eradicated
I would not be interested in doing this



91%

of 65+

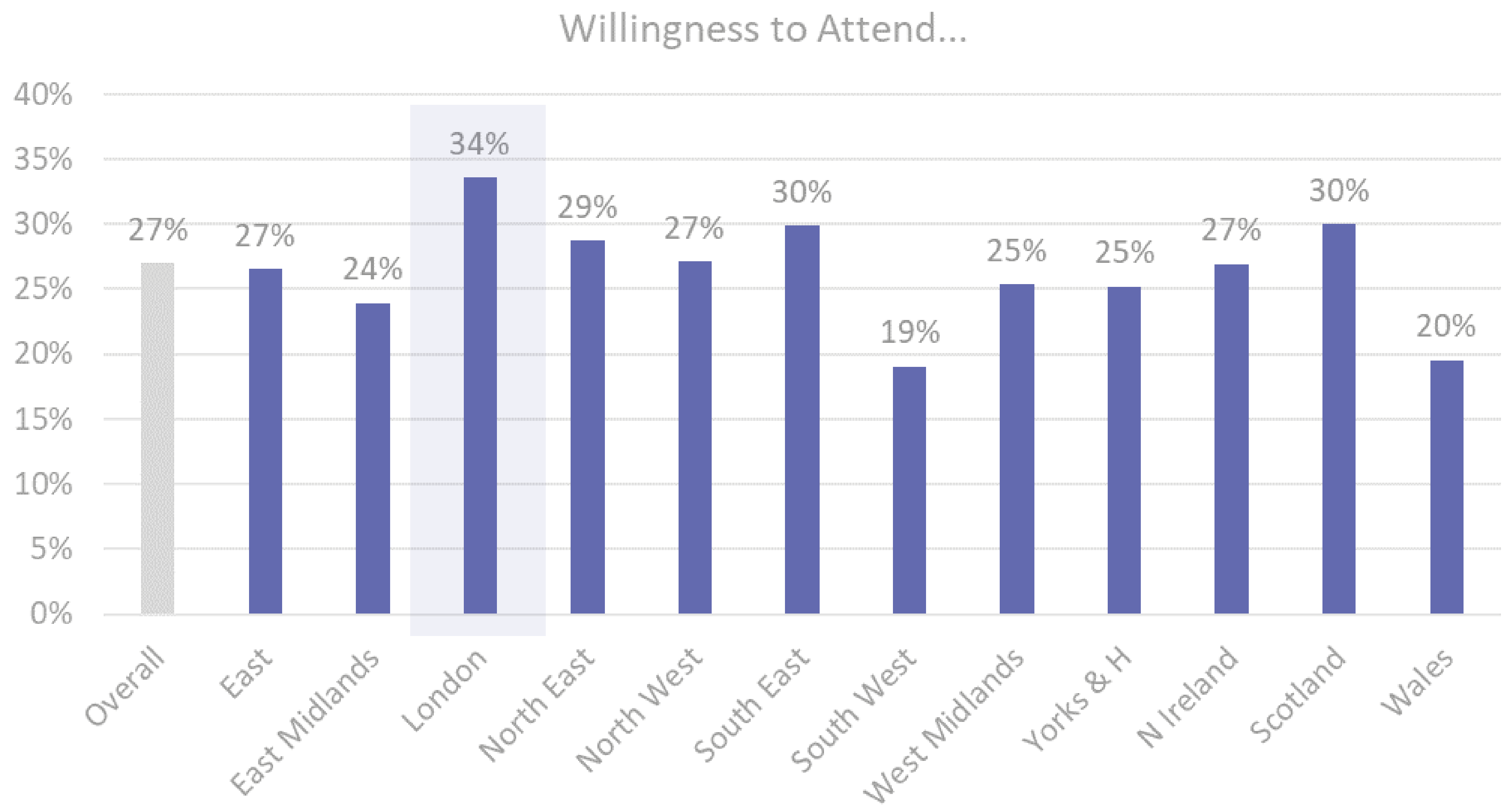
had been vaccinated.

As had:

45% of CC

57% of H&H*

*CC = Commuterland Culturebuffs, H&H = Home & Heritage, both older groups who may be less likely to return



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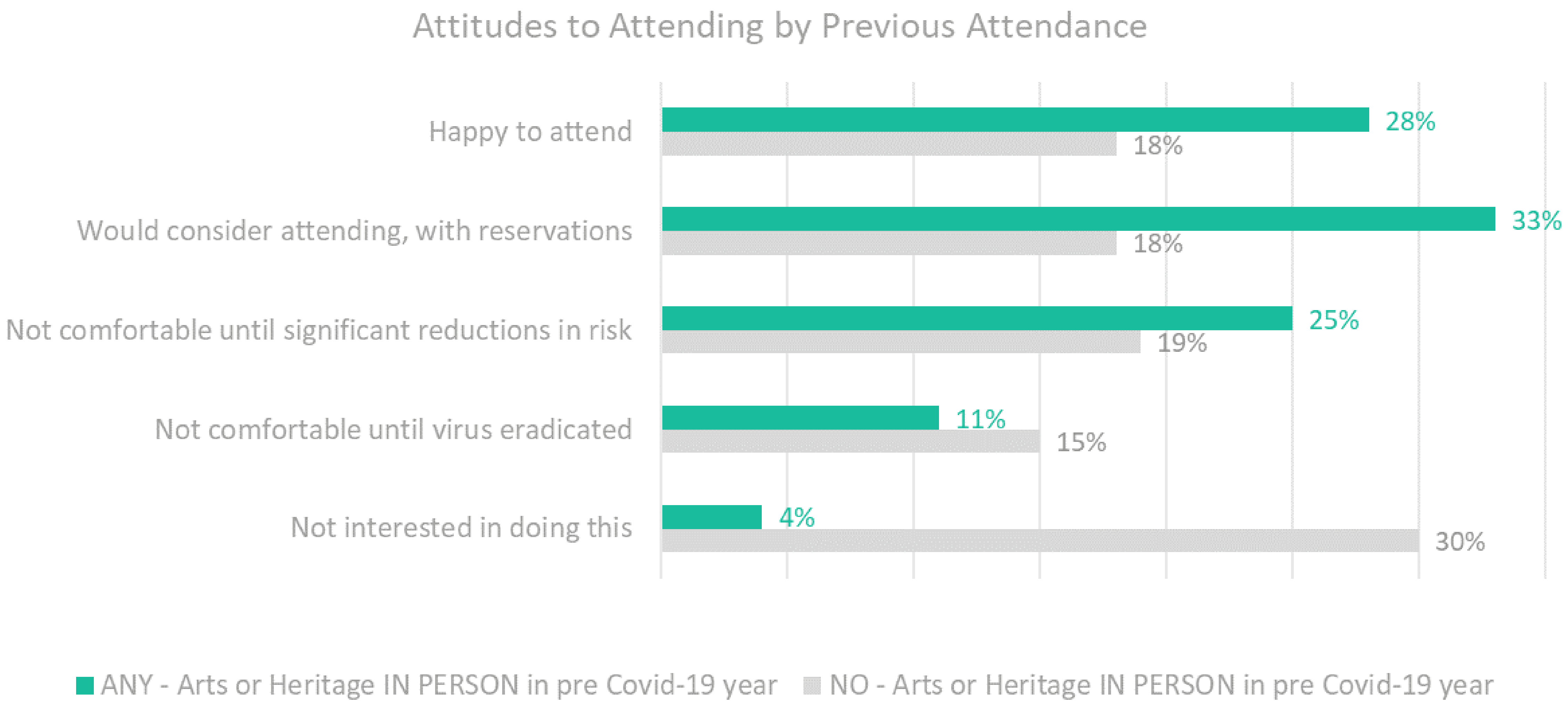

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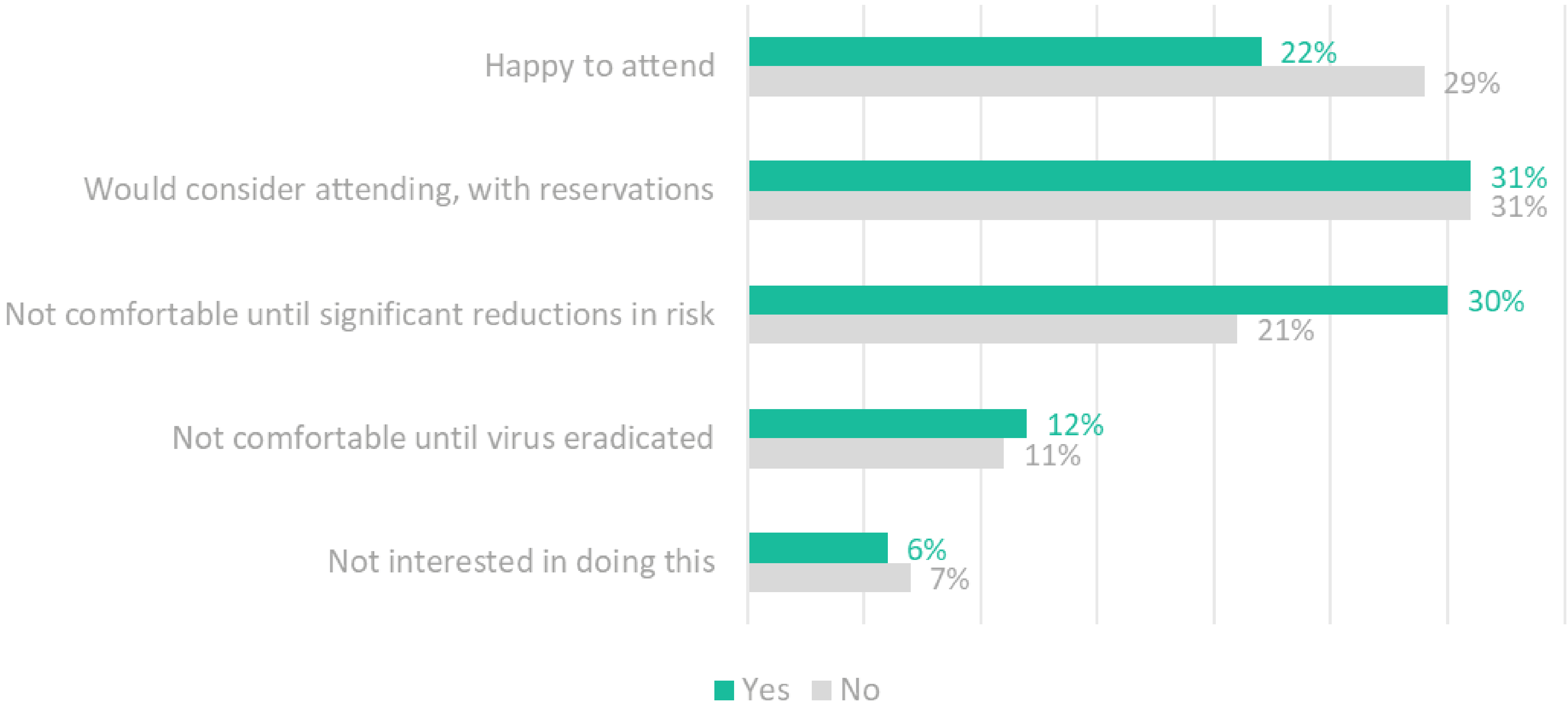
Attitudes to Attending by Whether Vaccinated

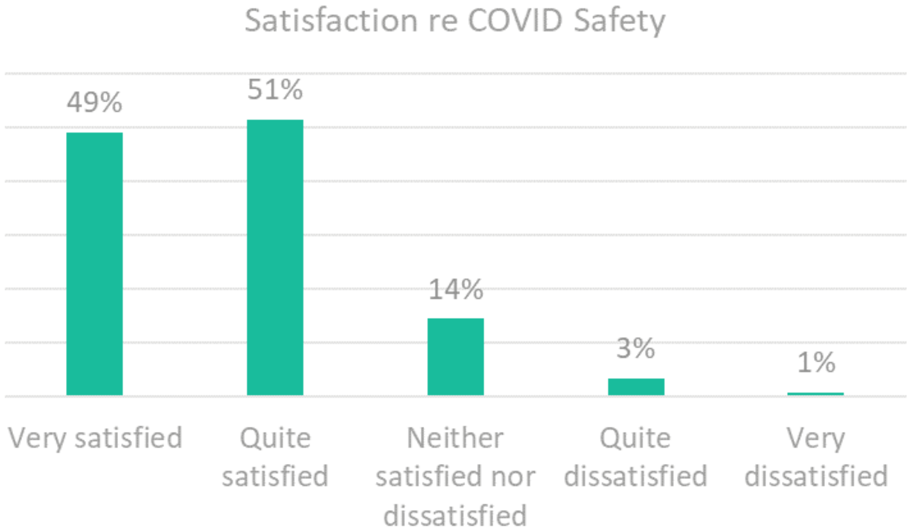


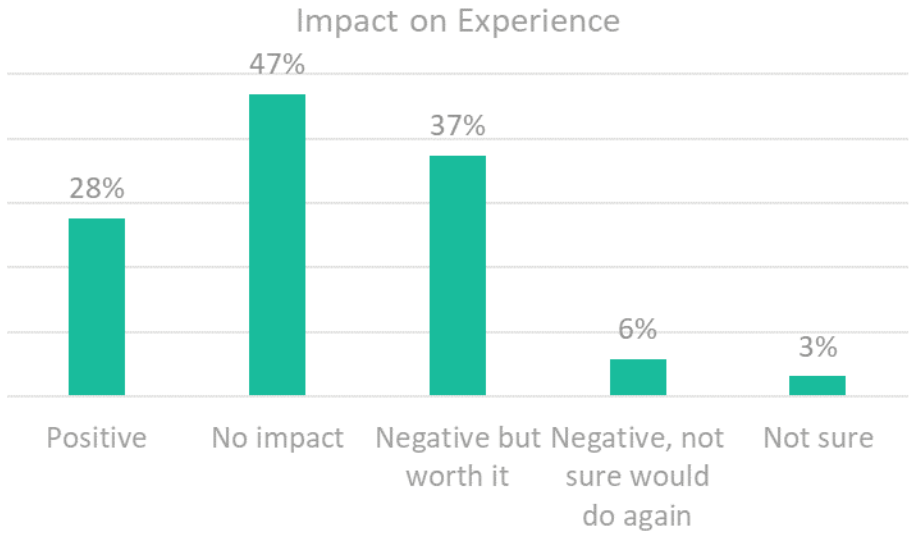
Safety Measures

Where people had attended since the pandemic, they said:

- The overall experience was good or very good
- That COVID safety measures were effective
- They didn't diminish the experience too much

[NB figures don't total to 100% b/c individual could answer for >1 art form]





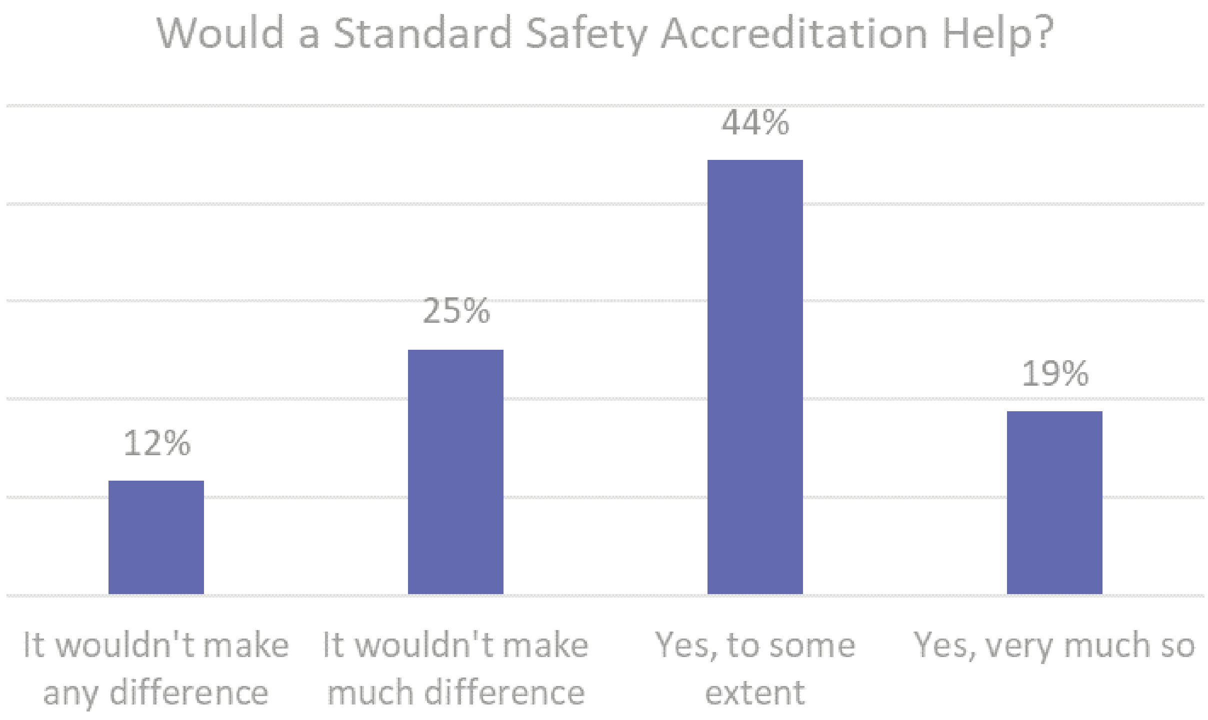
Would a standard safety accreditation help you feel comfortable attending?

It makes most difference for (% 'Yes, very much so' or 'Yes, to some extent' – cf. 63% overall):

- 16-24 year olds (75%)
- Commuterland Culturebuffs (71%)
- Up Our Street (69%)
- Households with children (68%)

It makes least difference for :

- 55-64 and 75+ year olds (58%)
- Home & Heritage (56%)



But rarely much above 1 in 5 'Yes, very much so'

Summary

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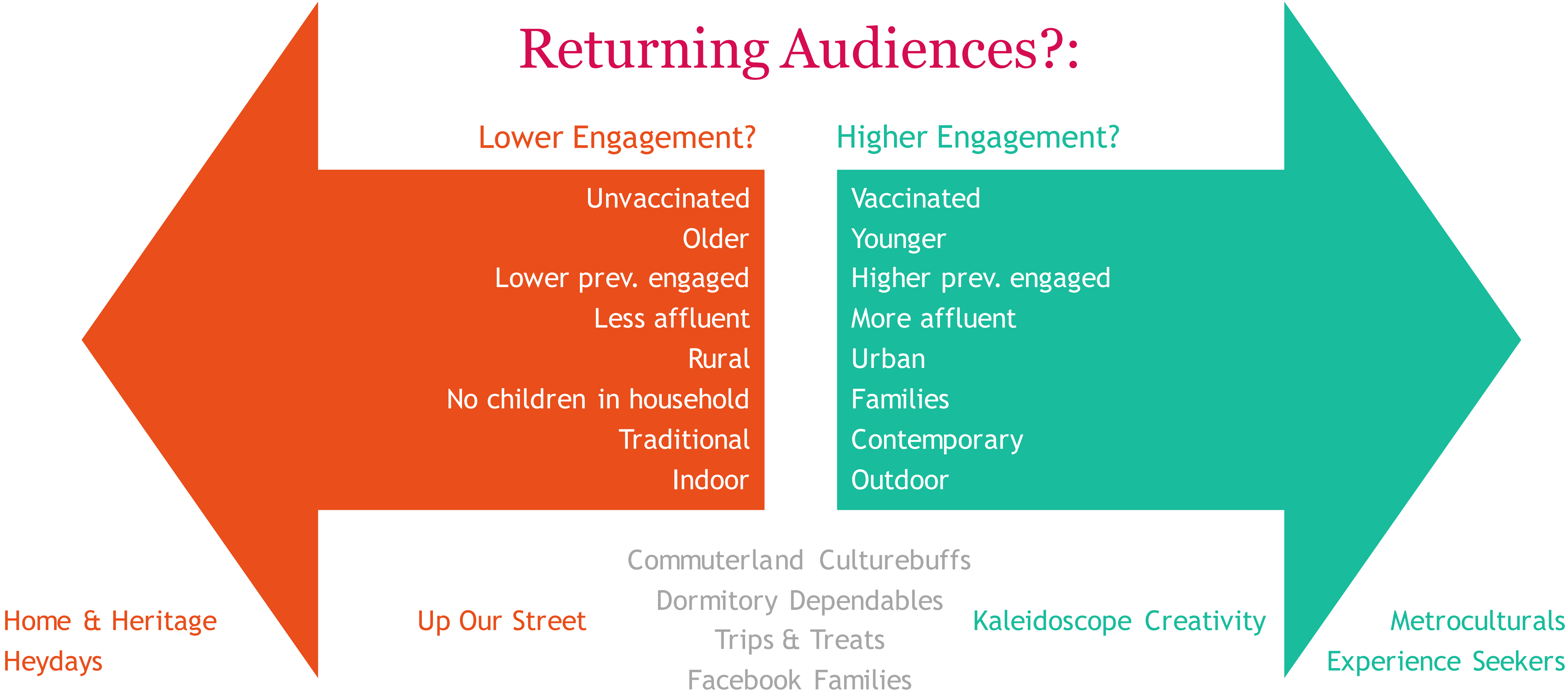
Implications for Returning Audiences?:



Thank you

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