

Southern England Audiences Summary

From the COVID-19 Cultural Participation Monitor

Southern England Audiences Summary from COVID-19 Monitor

This report summarises results for Southern England from the first wave of The Audience Agency's COVID-19 Monitor, a nationally-representative online survey of the UK population and their experiences and responses to COVID, particularly in relation to cultural engagement. The wave 1 sample of 6,055 responses was carried out between Oct and Nov 2020. The East (E) sample was of 539 respondents, with a MOE of 4%, South West (SW) 460 respondents, with MOE of 5%, and South East (SE) 665 respondents, with a MOE of 4%.

This report draws out some headline figures and key differences for the Southern England, compared to the UK overall, or other nations and regions. More details are available from The Audience Agency on request.

NB: The sample for smaller regions was boosted to larger than their proportion of the UK population, and then these responses weighted down for UK-wide results. Results were weighted within regions in order to be representative of the ethnic diversity of that region.

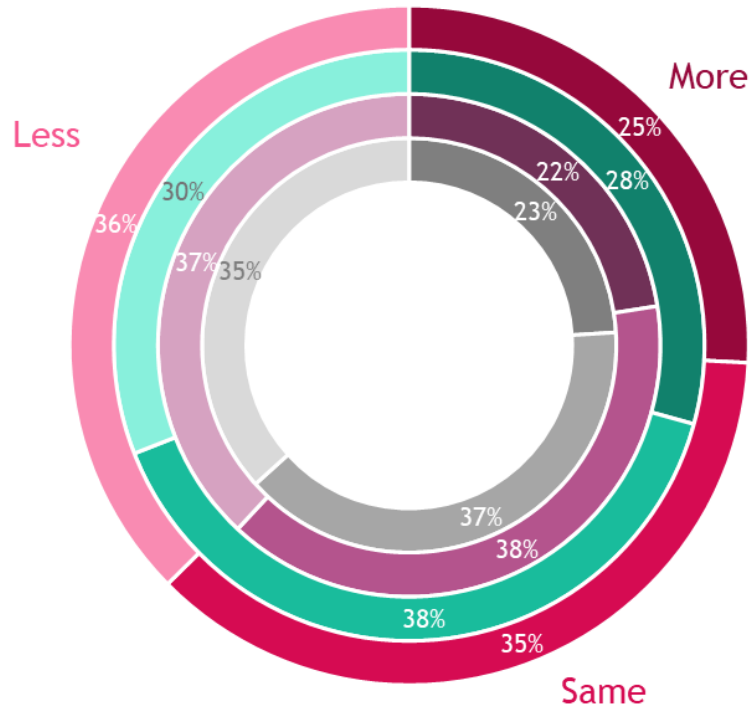
Summary of Findings

- Southern England had levels of arts and cultural engagement before COVID in line with the UK average (**slightly higher for SE**, and **lower for SW and E**), and dropped at similar levels since March 2020 (lower drops for **visual arts SW** and **higher for E**), similar for creative activities (with higher proportions reading for pleasure).
- As of the beginning of November, COVID appears to have had **a lesser impact on SM in terms of time and money** available. Lower proportions in Southern England faced local lockdowns (esp. **SW** and **SE**).
- **Fewer E** and **more in SW / SE** are ready to start attending in person than UK average.

Experiences During COVID-19

Impact of COVID on Time and Money

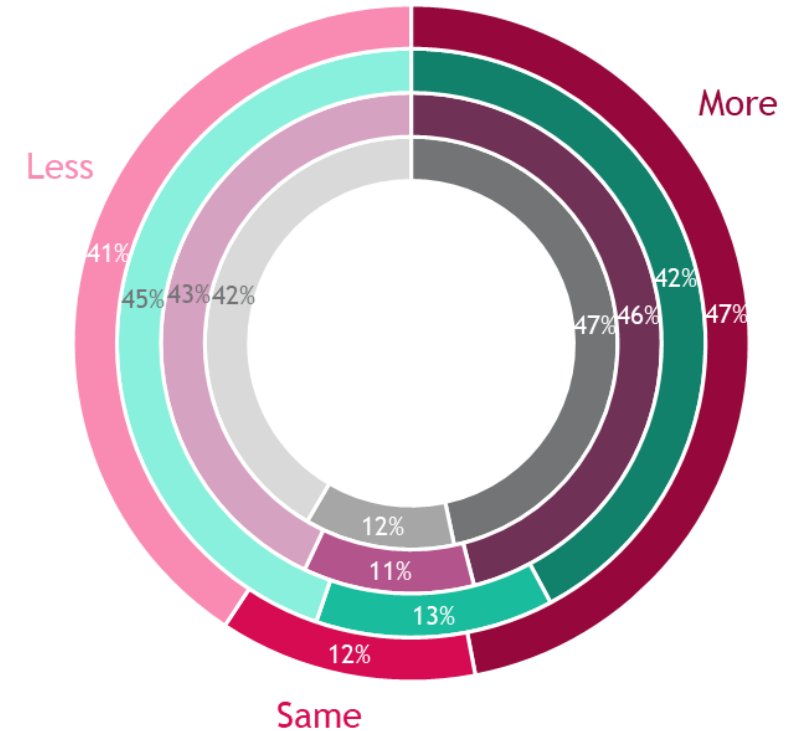
Change in Money Southern England vs Overall



SW saw lower financial drops than across the UK as a whole: there was a lower proportion who had 'less' money since before COVID. SE had higher proportions had the 'same' money since before.

(Slightly) higher proportions of SW had less time.

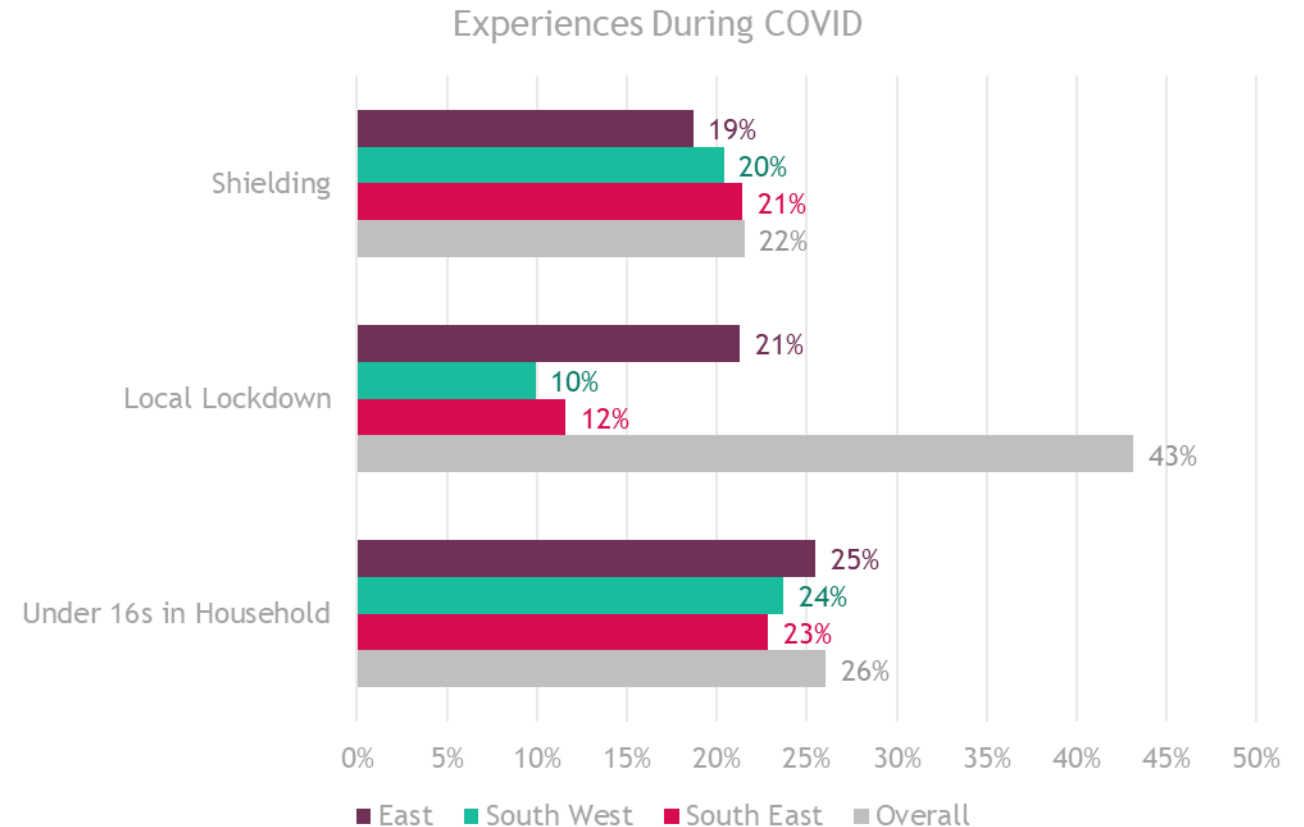
Change in Time Southern England vs Overall



Other Impacts of COVID

Southern England had a lower proportion than the UK average facing a local lockdown, lowest for SW and SE (c.30%).

Similar percentages were shielding and lived in households with children.



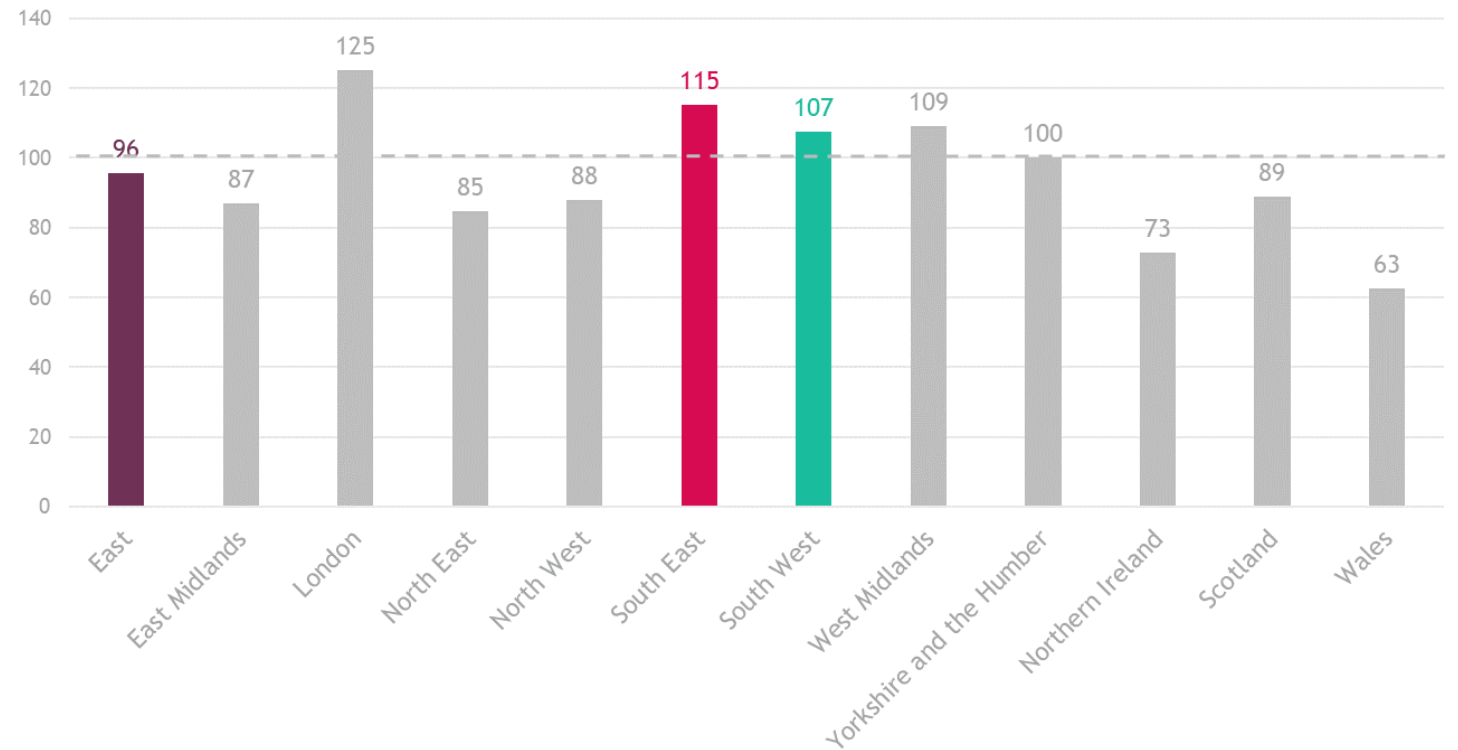
In Person Engagement

Attended Since March 2020

32% E, 36% SW and 39% SE had attended any arts/heritage since Mar 2020, below and above the overall UK average of 34%: 96, 107 and 115 cf. to an index of 100.

In the 12 months before, it was 81% E, 83% SW and 88% SE, below UK average (85%) for E and SW and above for SE.

Any Arts/Heritage Since March 2020 Index cf. Overall



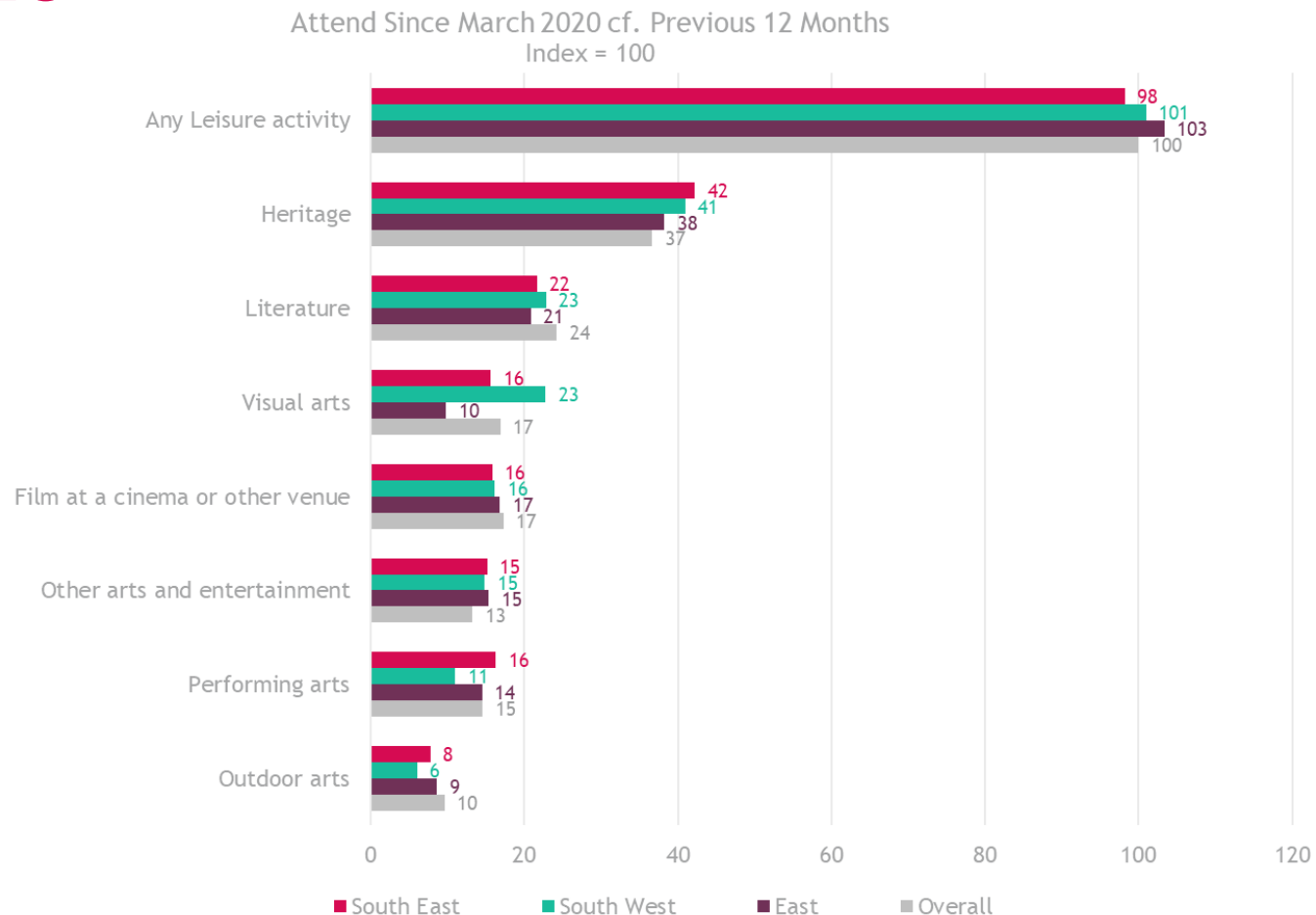
Attended Since March 2020

Attendance dropped at similar levels to overall, compared to pre-March 2020 level.

Higher drops in attendance are seen for **visual arts in E**, **outdoor and performing arts for SW**.

While lower drops were seen for **visual arts in SW** and **heritage in SE and SW**.

(NB: this is comparing 9 and 12 month periods)

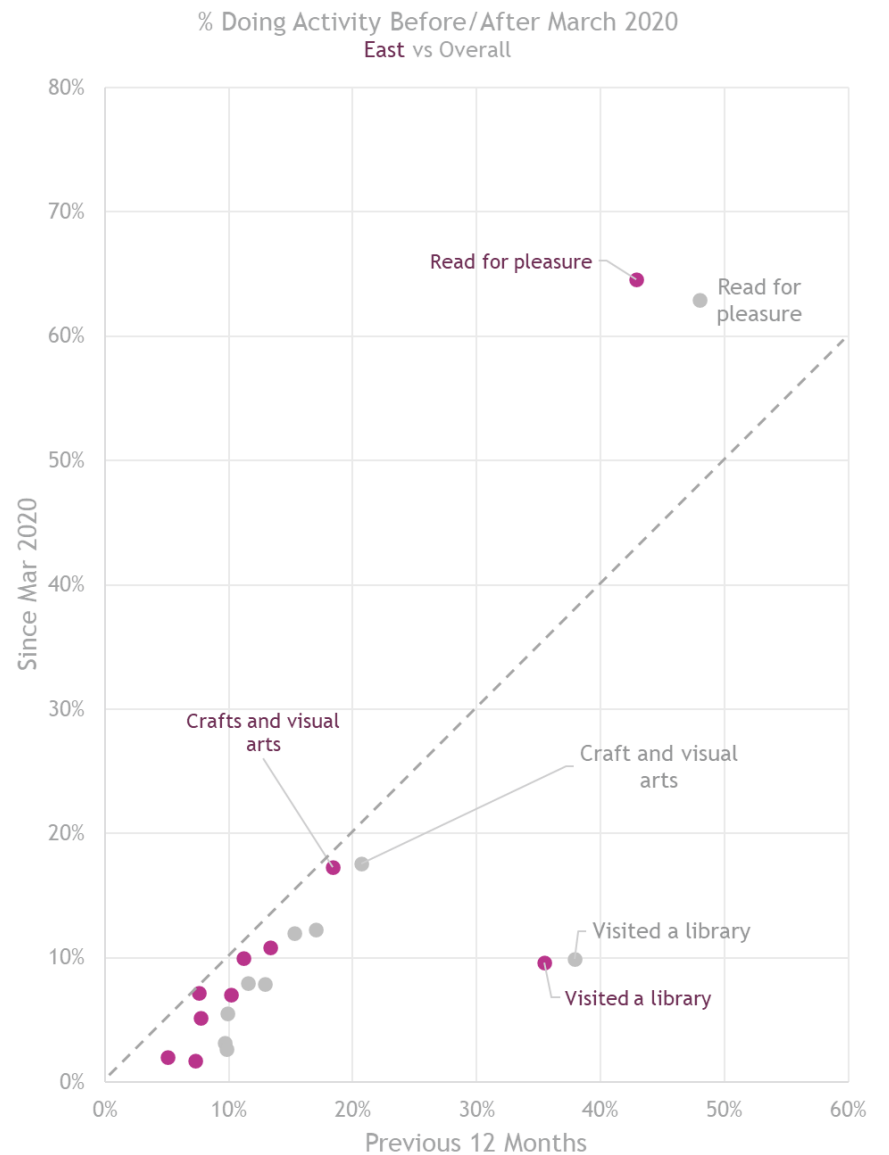


Creative Activities - E

Comparing creative activities before and after March 2020, four things stand out:

- Almost all activities were done by fewer people*
- **E** read for pleasure (slightly) lower than average levels before, but increased more than average after March
- **E** had (slightly) lower than average visiting libraries before and in line with average after March
- Overall, the activity levels of **East** has reduced at similar levels to those for the UK overall.

* So were below the dotted line (where levels would be the same)

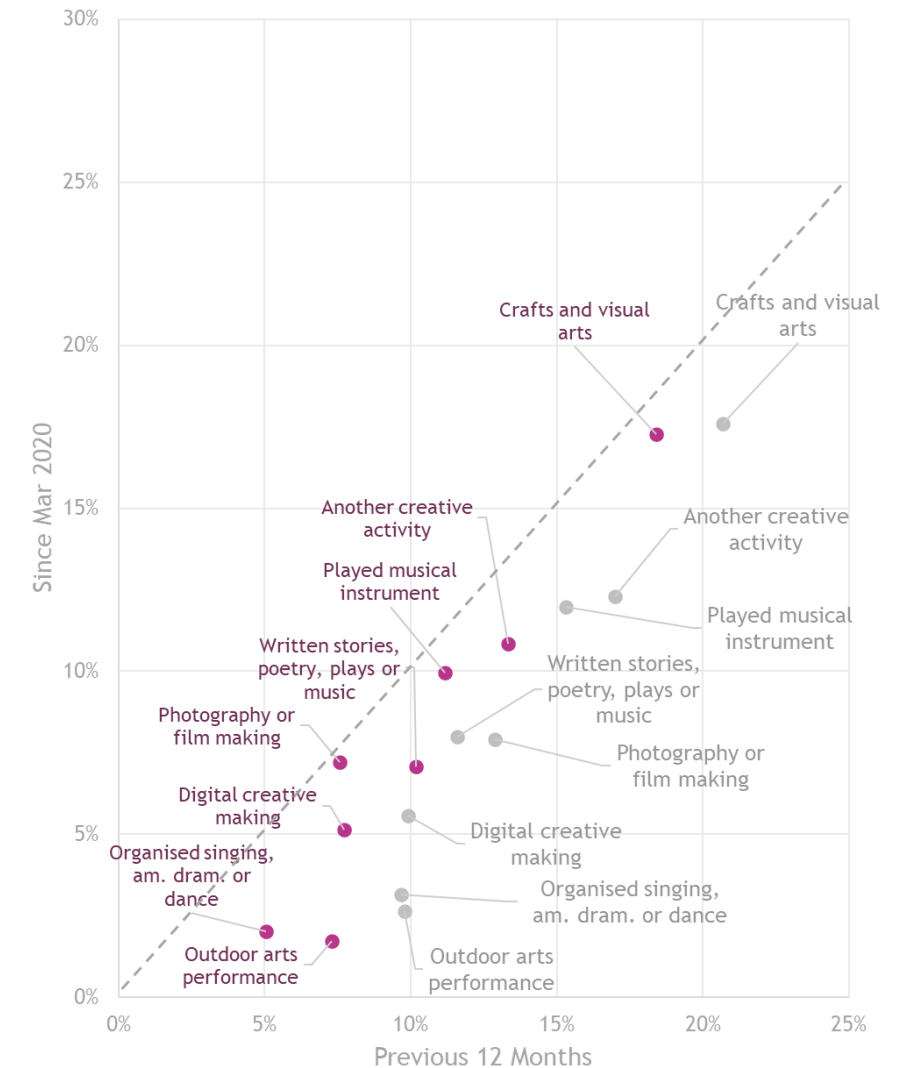


Creative Activities - E

For other activities:

- Most were less in **East** before March 2020
- And had fallen (slightly) more in **East** than elsewhere since March 2020
- The overall ranking of activities is similar for **East** compared to the whole of the UK.

% Doing Activity Before/After March 2020
East vs Overall

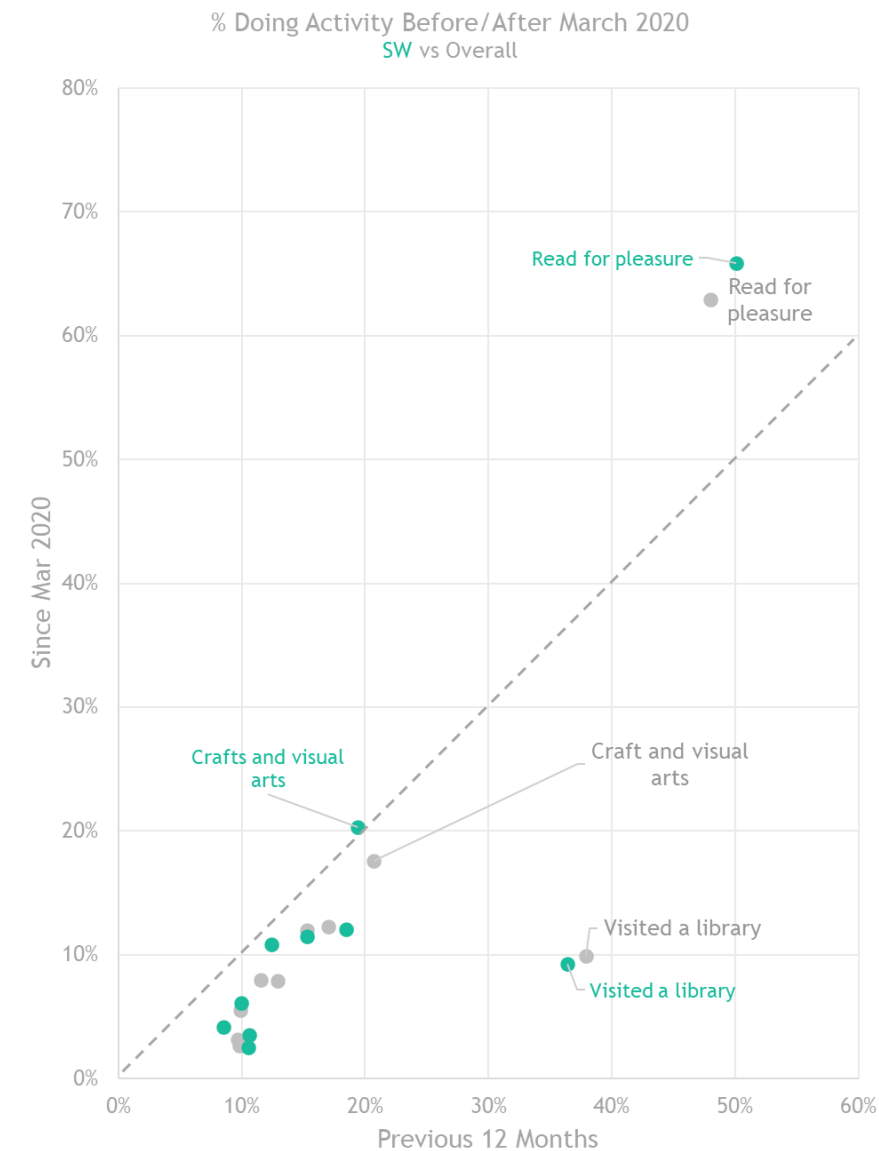


Creative Activities - SW

Comparing creative activities before and after March 2020, four things stand out:

- Almost all activities were done by fewer people*
- **SW** read for pleasure at (slightly) higher than average levels before, and increased just above average after March
- **SW** had lower engagement with crafts and visual arts than average before and slightly higher than average after
- Overall, the activity levels of **SW** has reduced at similar levels to those for the UK overall.

* So were below the dotted line (where levels would be the same)

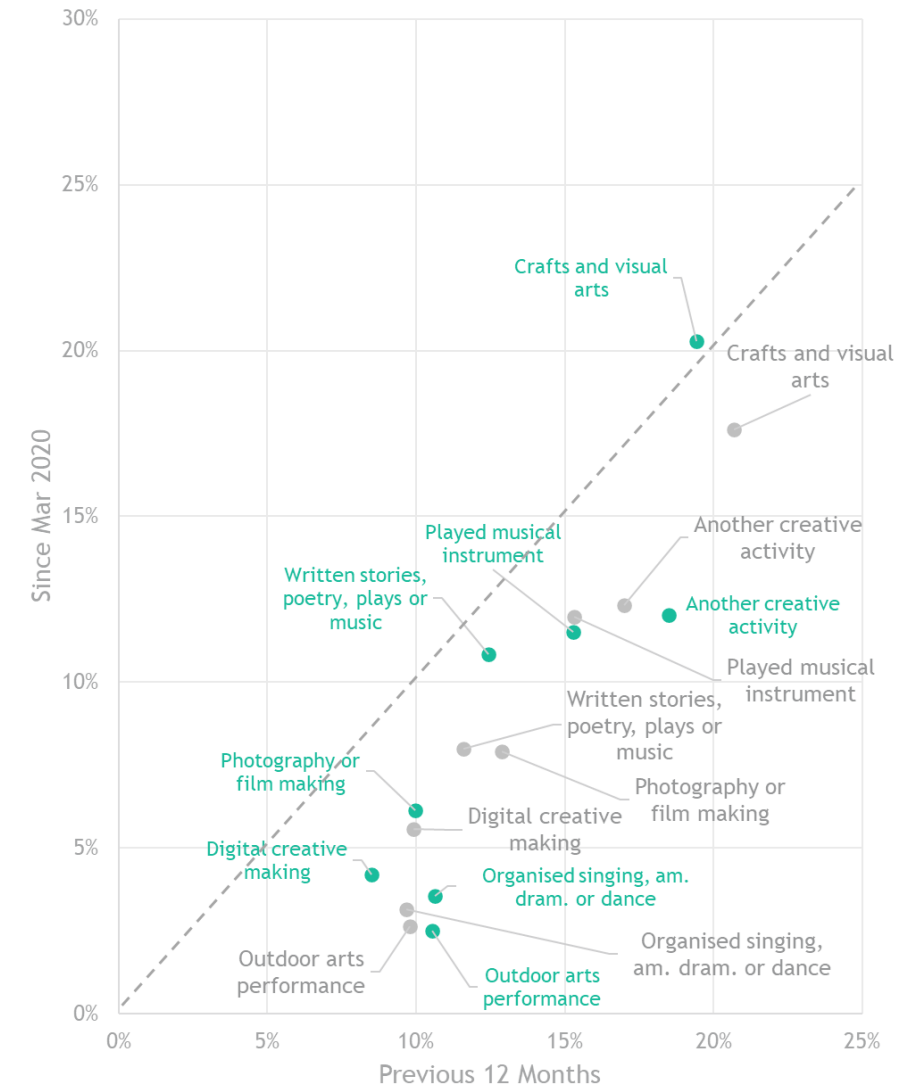


Creative Activities - SW

For other activities:

- Most were more in SW before March 2020
- And had fallen less in SW than elsewhere since March 2020
- The overall ranking of activities is similar for SW compared to the whole of the UK.

% Doing Activity Before/After March 2020
SW vs Overall

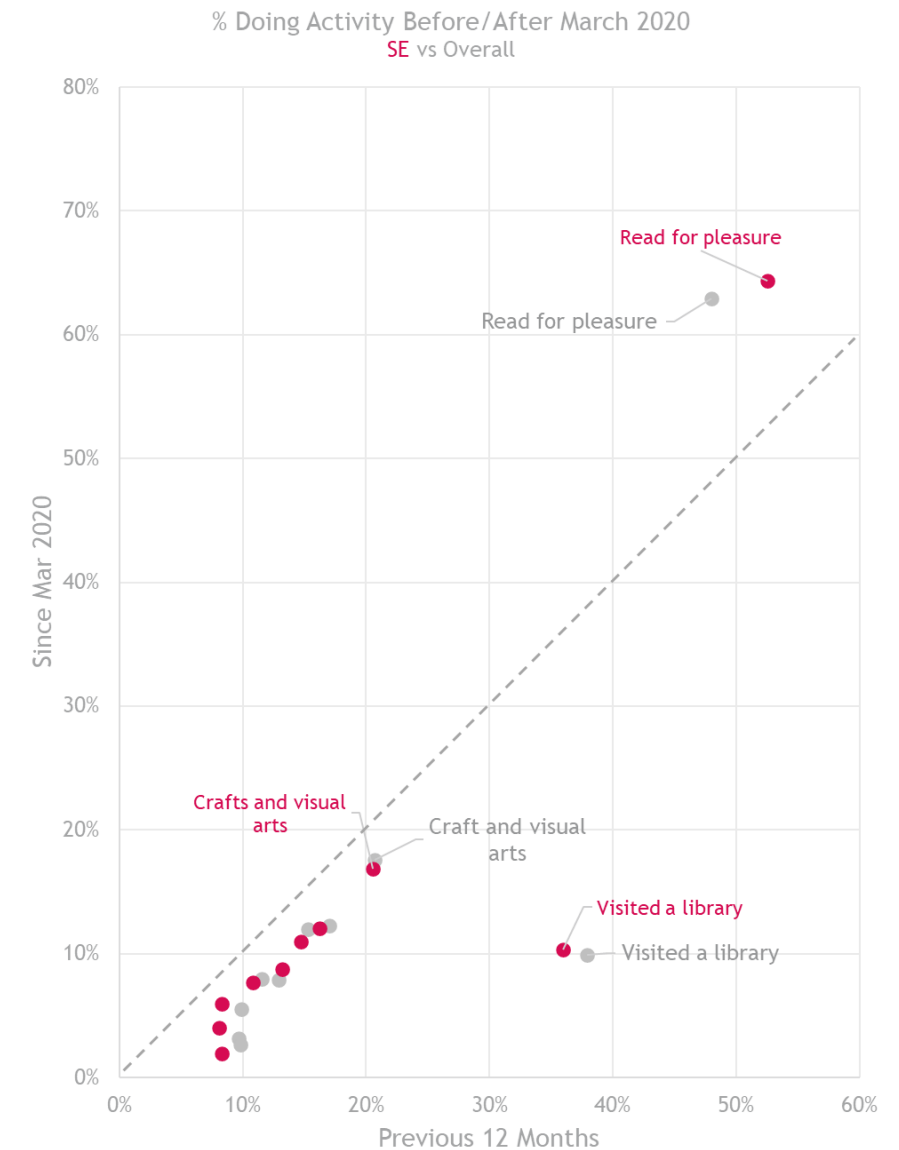


Creative Activities - SE

Comparing creative activities before and after March 2020, four things stand out:

- Almost all activities were done by fewer people*
- **SE** read for pleasure at (slightly) higher than average levels before and after March
- Overall, the activity levels of **SE** has reduced at similar levels to those for the UK overall.

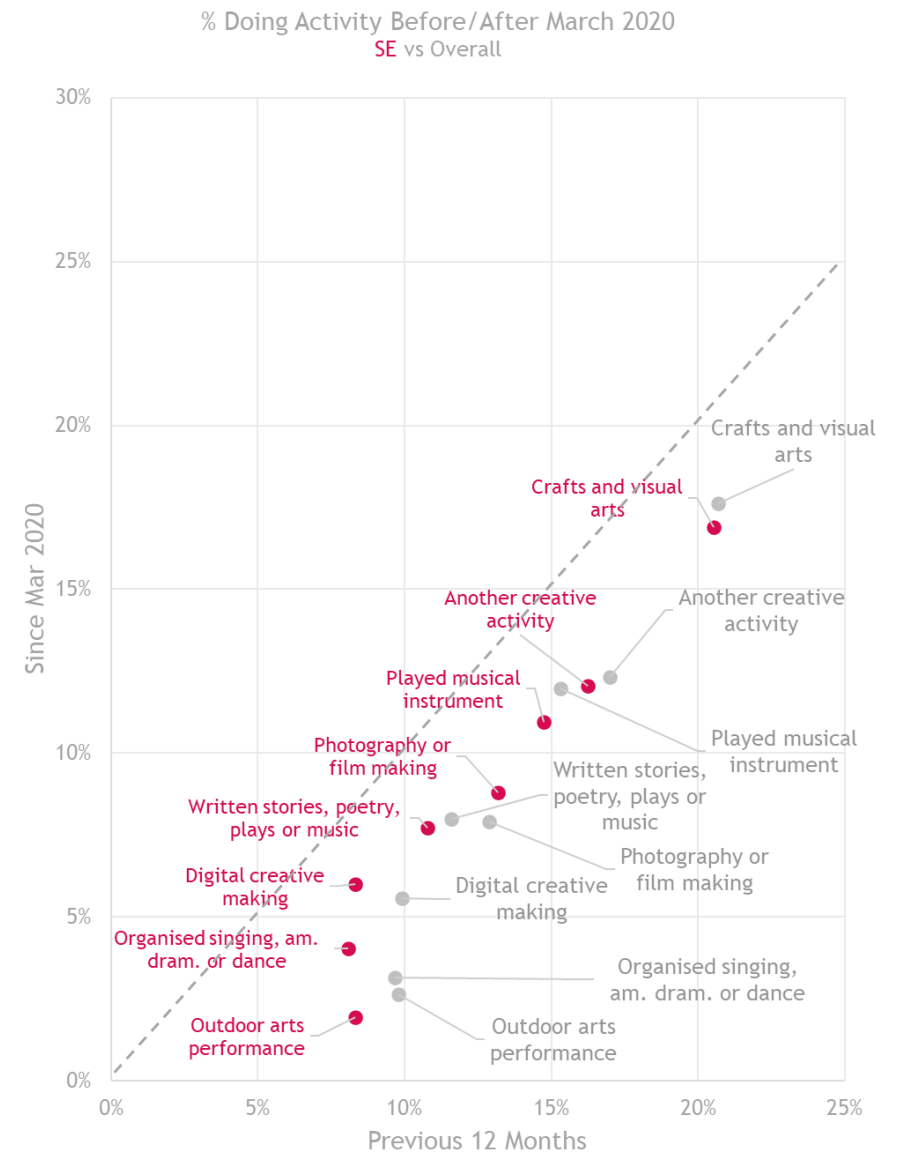
* So were below the dotted line (where levels would be the same)



Creative Activities - SE

For other activities:

- Most were (slightly) less in SE before March 2020
- But most had fallen a t similar levels in SE than elsewhere since March 2020
- The overall ranking of activities is similar for SE compared to the whole of the UK.



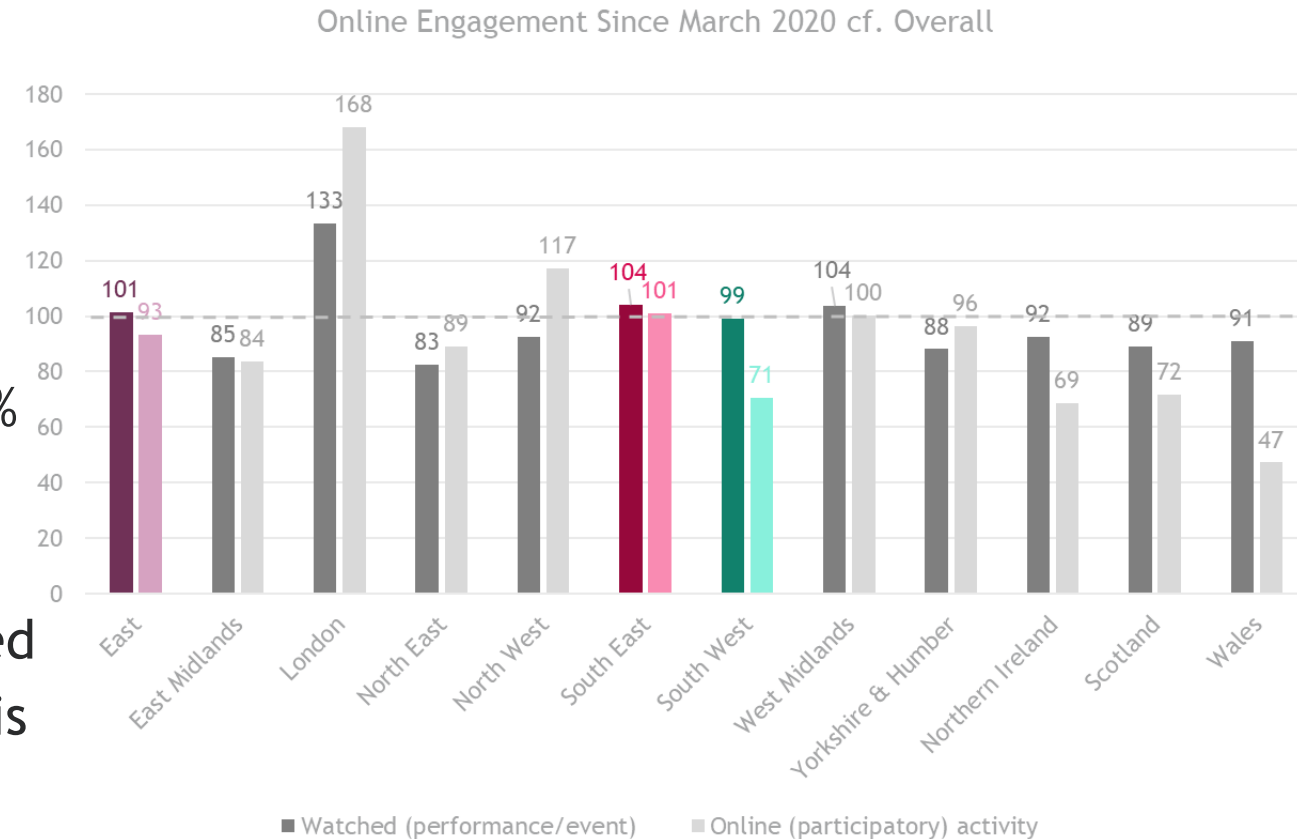
Online Engagement

Online Engagement Since March 2020

33% E, 33% SW and 34% SE watched a performance/ event online since March 2020; 8% E, 6% SW, and 9% SE had taken part in an online activity.

All in similar proportions to UK averages of 33% and 9%, SW slightly lower online activity.

In the previous 12 months 38% E, 41% SW and 47% SE (cf. 45% for the UK overall) had watched anything, so most of the lockdown difference is specific to this period, not existing levels.



Payment for Online Content

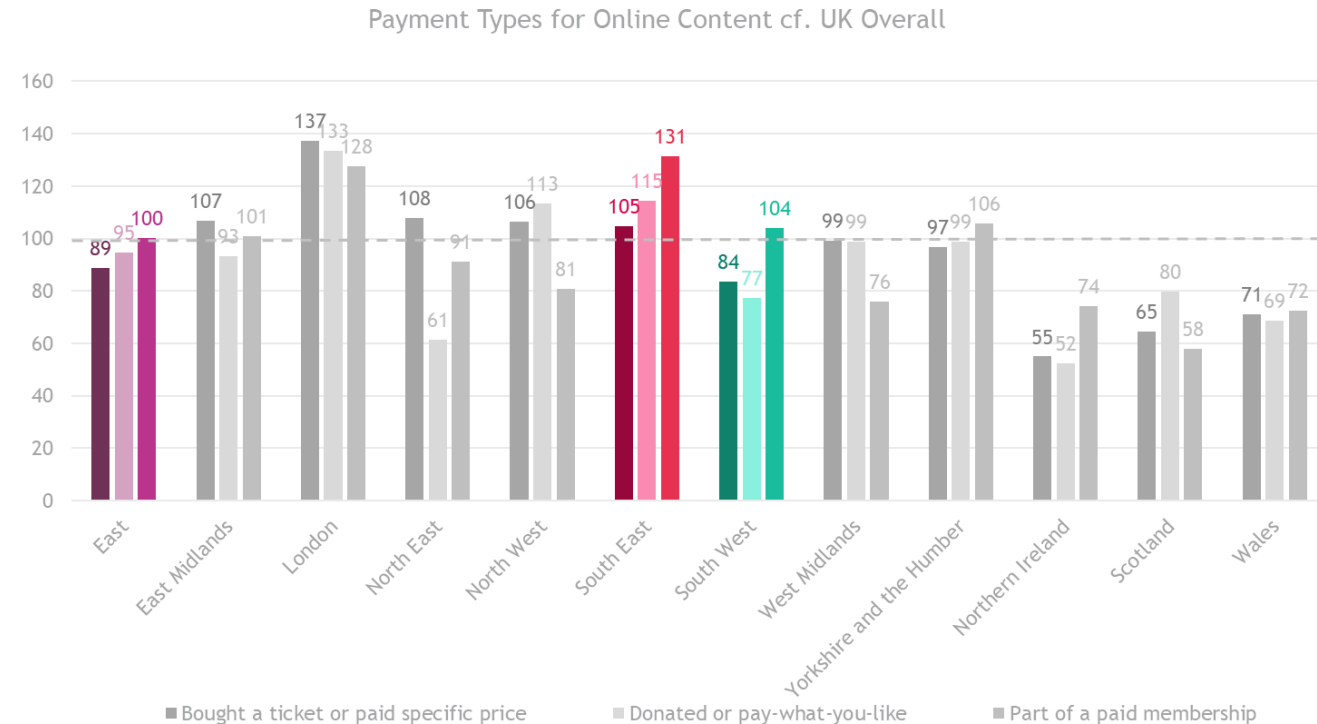
The proportion of **E** / **SW** / **SE** who had paid for digital content by the following means were:

15 / **14** / **18** — % Bought ticket/fixed price

18 / **15** / **22** — % Donated/ pay what you like

11 / **12** / **15** — % Part of paid membership

SE (slightly) higher than overall UK averages of 17%, 19%, 11%, **SW** and **E** lower for ‘bought ticket/fixed price’ and **E** also lower for ‘Donated/ pay what you like’.



Future Engagement

Booked or Interested Overall

The % who are currently 'in play' (i.e. who have booked, or are interested in booking) for ANY art and heritage activity of those listed (see next page) is **c. 4%** lower in E than the overall average, **c.3% higher in SW** and **c.4% higher in SE**.

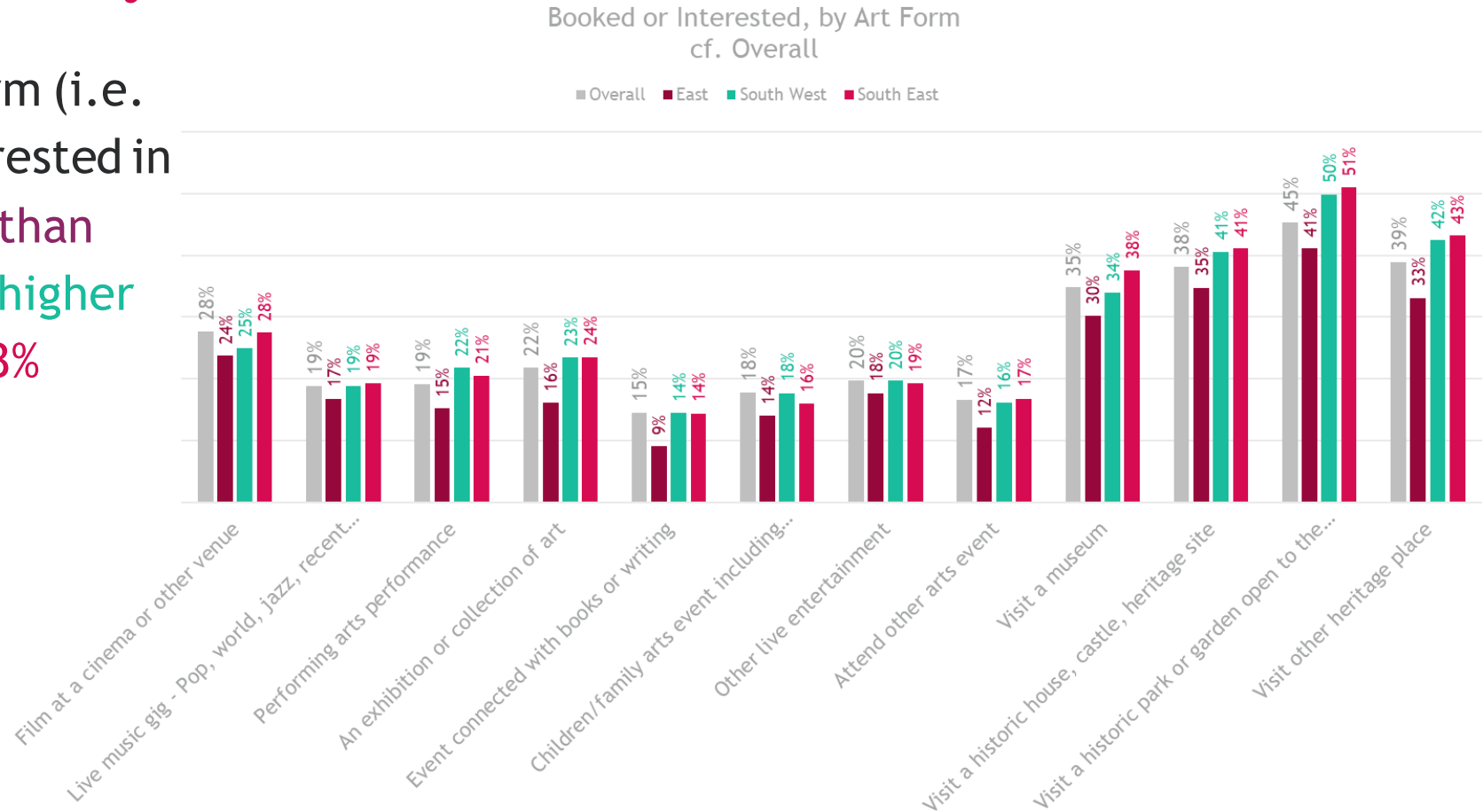
Booked/interested for ANY art / heritage activity:

59% E,
66% SW, 67% SE

Cf. 63% for UK Overall

Booked or Interested by Art Form

The % 'in play' for each artform (i.e. who have booked, or are interested in booking) is also c. 2-6% lower than overall average for E, c. 0-3% higher than overall for SW, and c. 0-3% higher for SE.



For more information...

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For background and methodology, please see the
COVID-19 Monitor Summary Report and/or visit
theaudienceagency.org/bouncing-forwards-insights-hub/covid-19-cultural-participation-monitor

