

# Wave 7 Findings

from the Cultural Participation Monitor

Oliver Mantell

Director of Evidence & Insight

Tom Dykes

Director of Digital, Association of Cultural Enterprises

Oct 2022

 the audience agency

# About the Cultural Participation Monitor

A population study on cultural engagement and key current issues, based on a longitudinal, nationally-representative online survey (via Dynata)

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

Wave 2: 1,503 responses, Feb 2021

Wave 3: 2,012 responses, Jun 2021

Wave 4: 1,879 responses, Sept/Oct 2021

Wave 5: 5,718 responses, Nov 2021

Wave 6: 3,197 responses, Apr 2022

**Wave 7: 3,280 responses, Sep 2022**

>23k responses in total

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

**Background:** Waves 1-5 AHRC-funded, as part of Centre for Cultural Value's *COVID-19: Impacts on the cultural industries and the implications for policy* research project.

Wave 7 was supported by the Association for Cultural Enterprises.

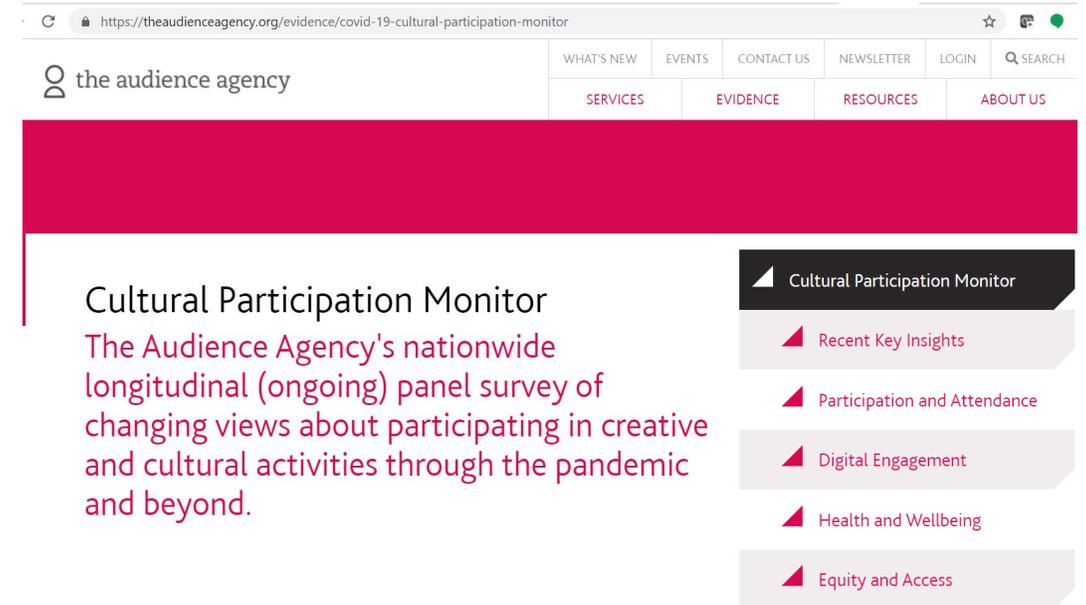
# About the Cultural Participation Monitor

## What it includes:

- Physical/digital/participatory engagement with culture
- Wider leisure habits/activity
- Attitudes and responses re COVID, Cost of Living and other issues

## For:

- Pre-COVID baselines
- During COVID / lockdowns
- Future intentions to engage.



The screenshot shows the website for the Cultural Participation Monitor. The URL in the browser is <https://theaudienceagency.org/evidence/covid-19-cultural-participation-monitor>. The page features a navigation menu with links for WHAT'S NEW, EVENTS, CONTACT US, NEWSLETTER, LOGIN, and SEARCH. Below the navigation, there are tabs for SERVICES, EVIDENCE, RESOURCES, and ABOUT US. The main content area is titled "Cultural Participation Monitor" and describes it as "The Audience Agency's nationwide longitudinal (ongoing) panel survey of changing views about participating in creative and cultural activities through the pandemic and beyond." A sidebar on the right lists several key insights: Recent Key Insights, Participation and Attendance, Digital Engagement, Health and Wellbeing, and Equity and Access.

*For overall findings from Wave 1-7 and by theme, see [theaudienceagency.org/evidence](https://theaudienceagency.org/evidence)*

# Main Themes for This Session

- Attitudes to Covid
- The Cost of Living
- Overall Engagement
- Everyday Participation
- Retail Offers
- Future Attendance
- Implications



# Attitudes to Covid

# Attitudes to Covid

Wave 1: Oct-Nov 2020

Wave 2: Feb 2021

Wave 3: Jun 2021

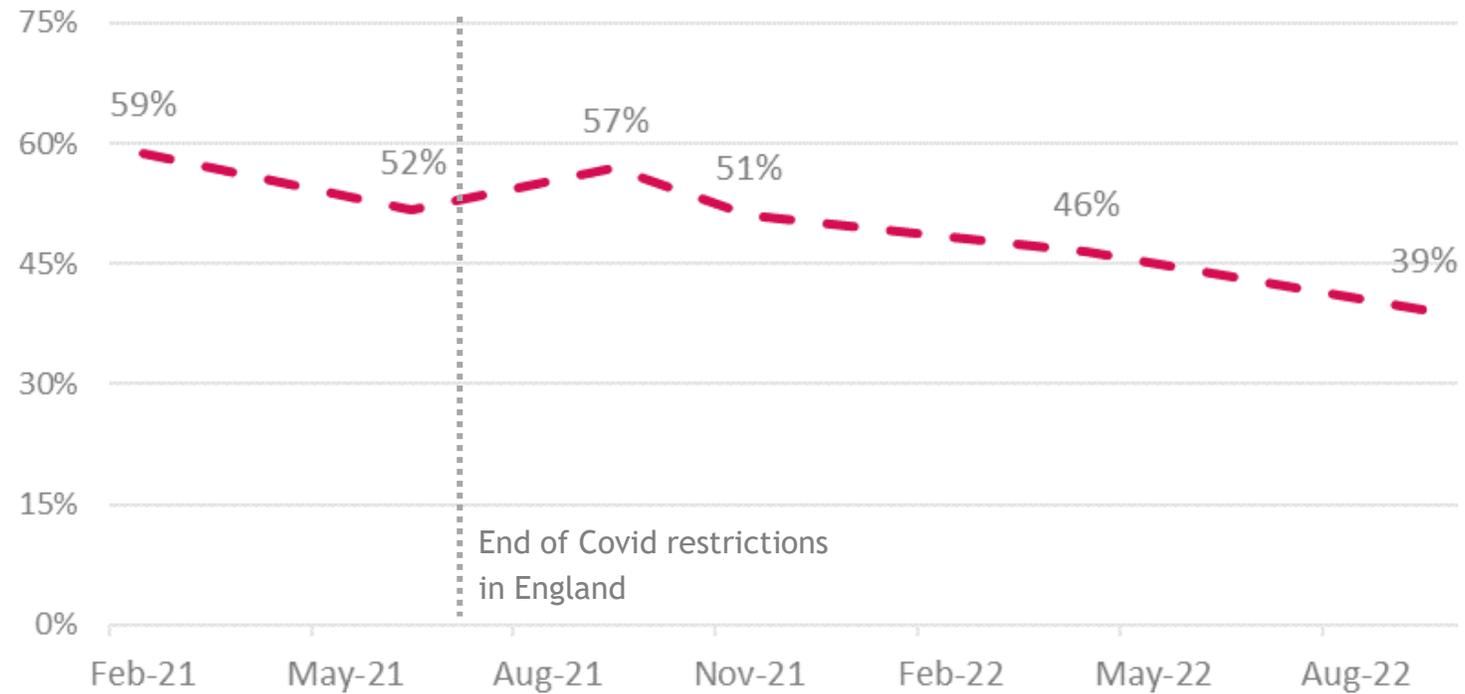
Wave 4: Sept/Oct 2021

Wave 5: Nov 2021

Wave 6: Apr 2022

Wave 7: Sep 2022

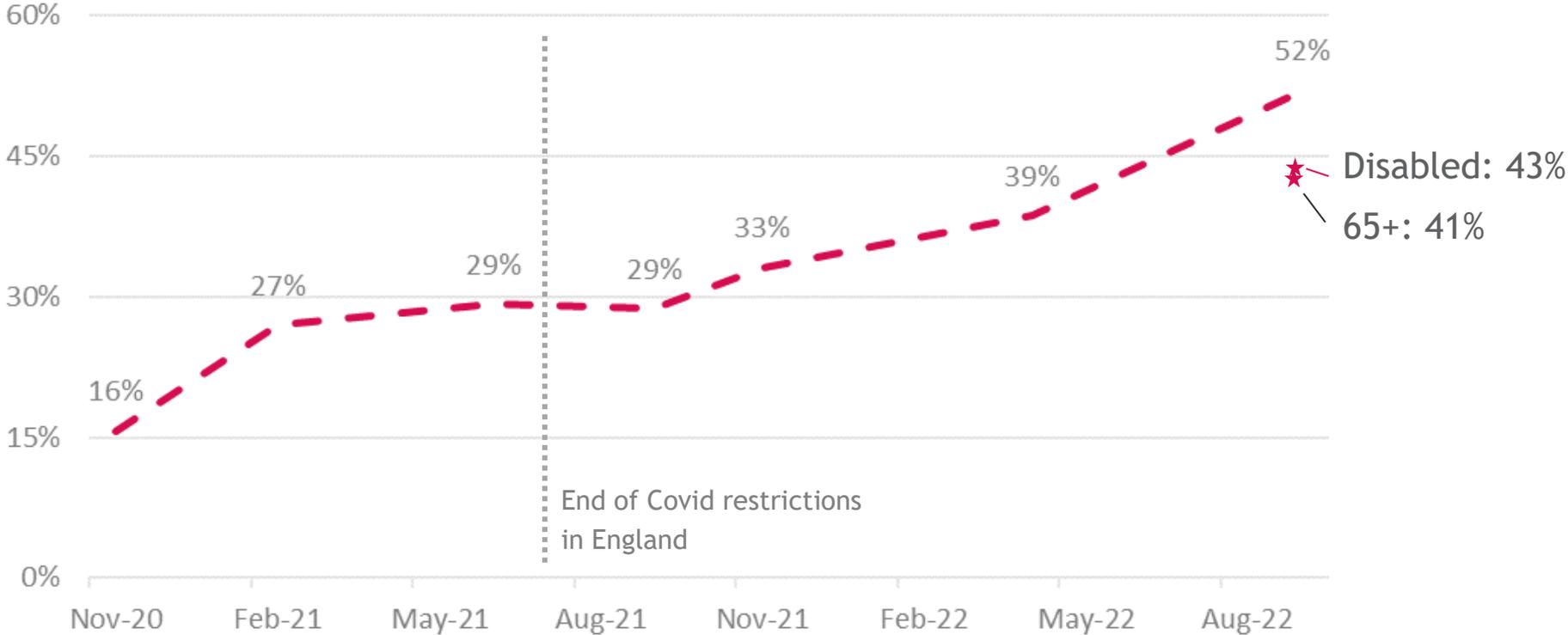
Worry about Covid has decreased, but remains high  
% Strongly agree/Agree "I am worried about falling ill with Covid-19"



# Willingness to Attend

- Wave 1: Oct-Nov 2020
- Wave 2: Feb 2021
- Wave 3: Jun 2021
- Wave 4: Sept/Oct 2021
- Wave 5: Nov 2021
- Wave 6: Apr 2022
- Wave 7: Sep 2022

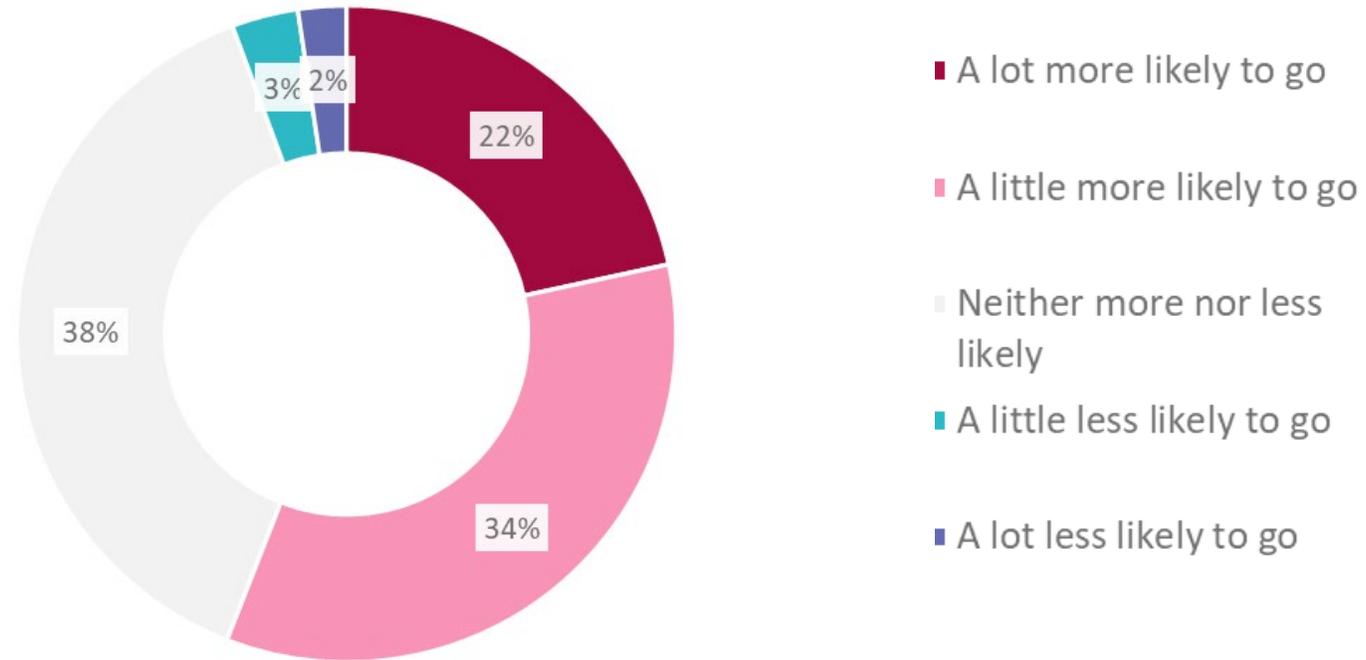
Willingness to attend has continued to rise  
% "I would be happy to attend if there was something I wanted to see or do"



# Covid Safety Measures

*If an event that you were interested in had lots of Covid-19 safety measures in place, would you be:*

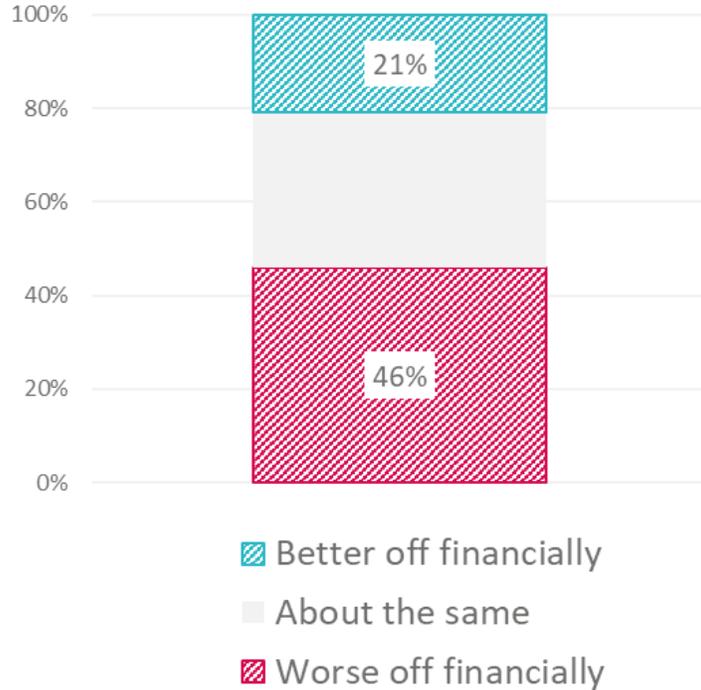
Over half would be more likely to attend with Covid safety measures in place



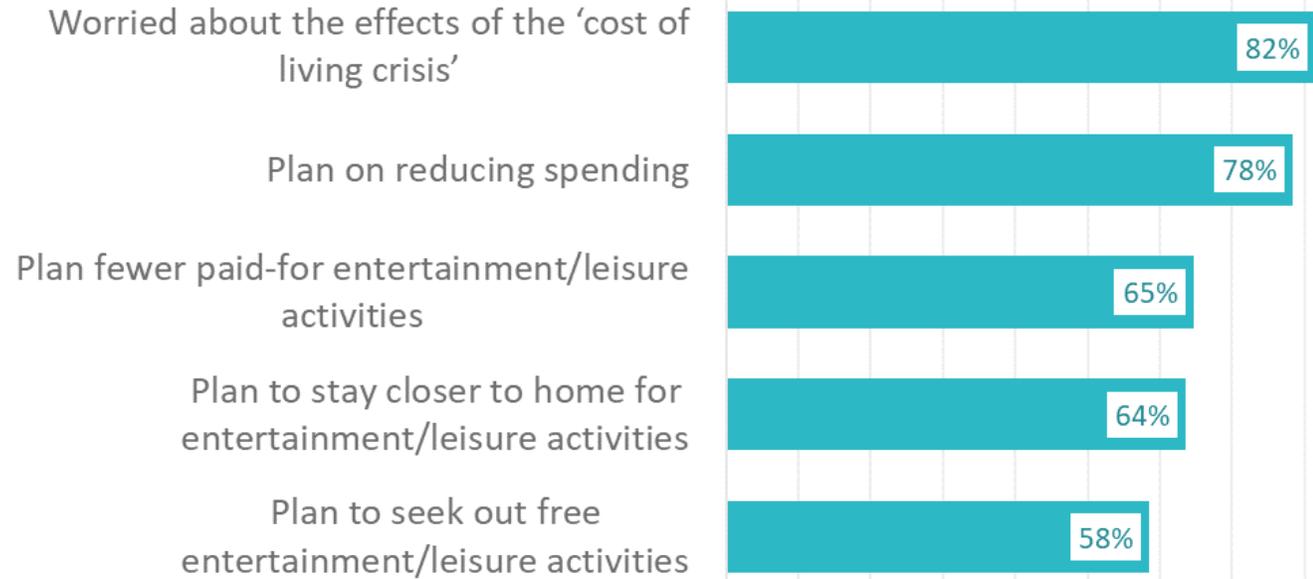
# Cost of Living

# Cost of Living

Almost half the population are worse-off compared to pre-pandemic



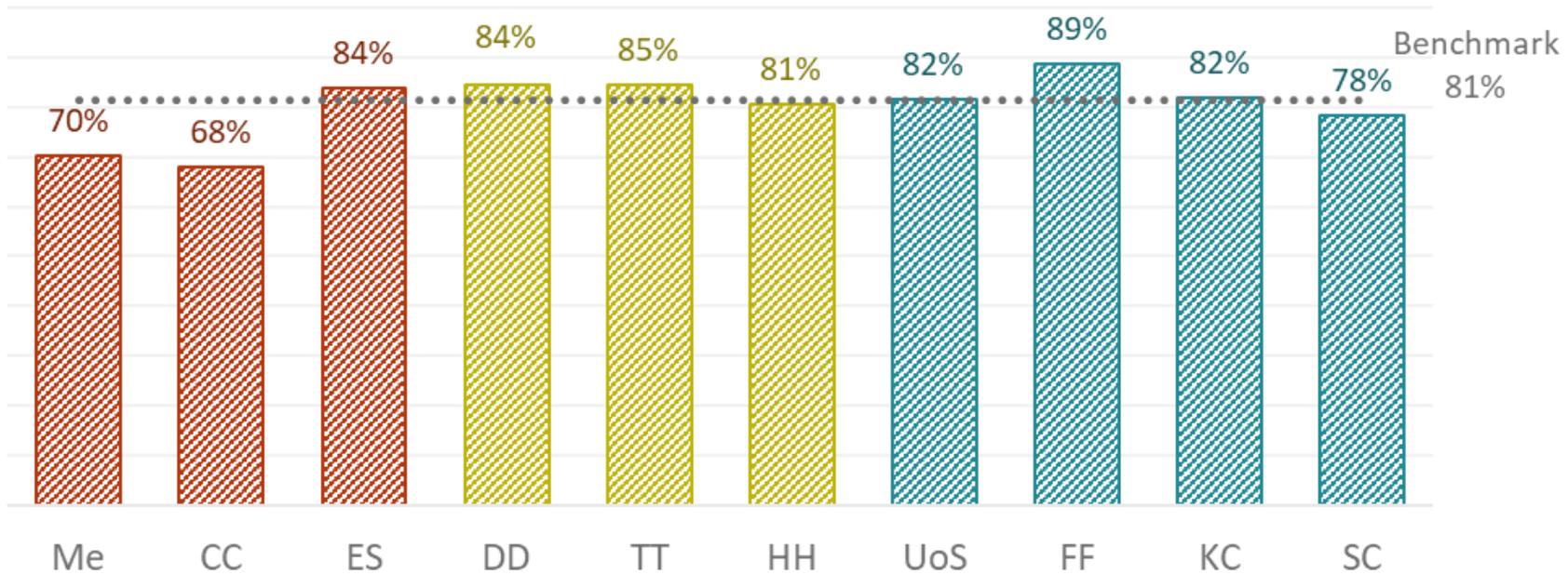
Most are worried about the cost of living, and plan on reducing spending, including by cutting back on leisure  
Net % Agree



# Cost of Living

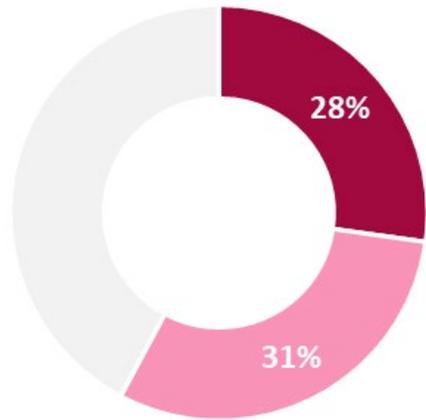
**Metroculturals** and **Commuterland Culturebuffs** are slightly less likely to be worried about the cost of living crisis

Net % Agree minus Disagree : "I am worried about the 'cost of living crisis' and its effect on me/my household "



# Cost of Living

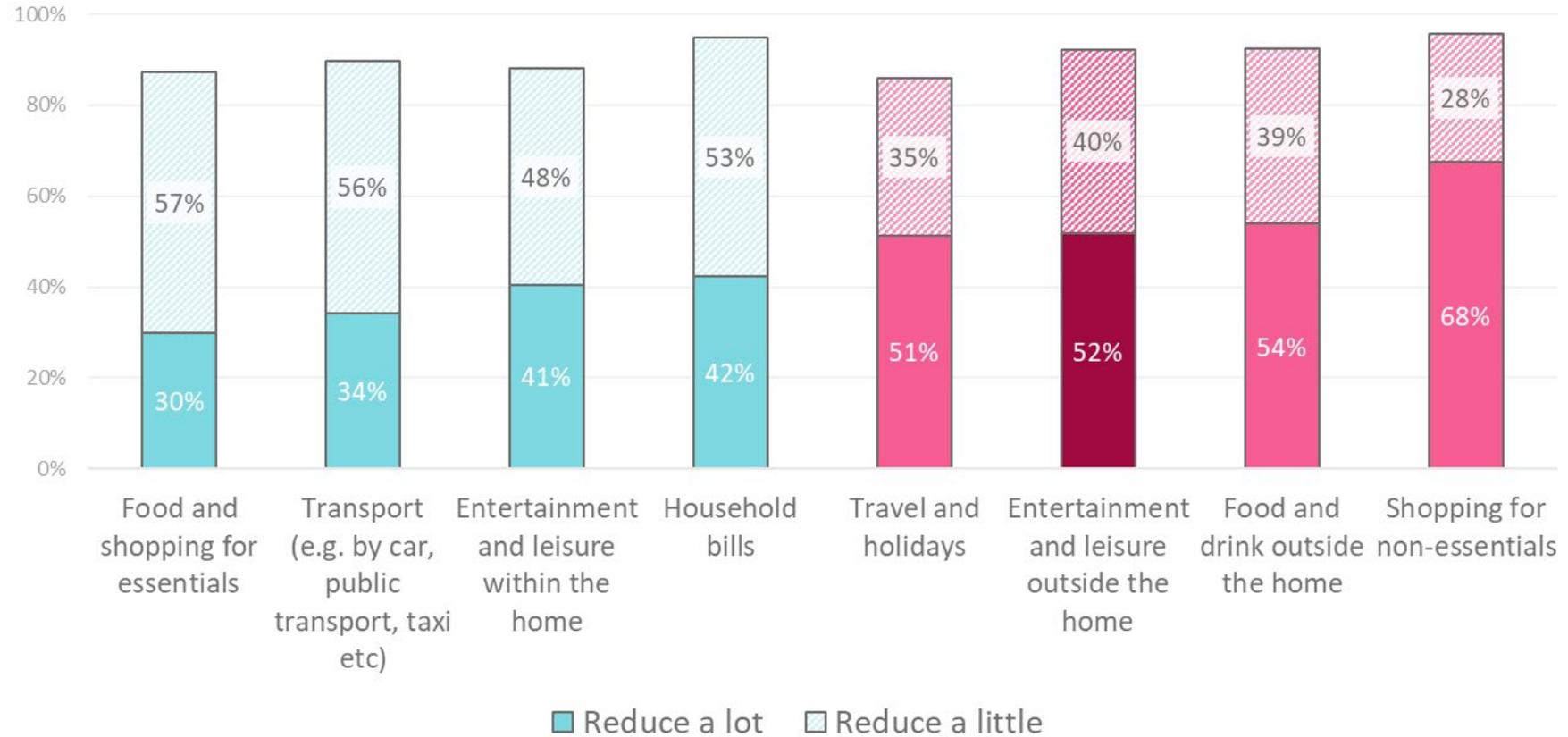
Most expecting to **decrease** spend on entertainment and leisure, compared to pre-pandemic



■ Decrease a lot  
■ Decrease a little

**59% total**

Non-essential expenses were **most likely to be reduced 'a lot'**



Least concerned



Most concerned

16%

A

Not looking to cut down

18%

B

'A little' everywhere

12%

C

Mainly bills

11%

D

Leisure and going out

19%

E

Holidays and going out

24%

F

'A lot' everywhere

Segments

Metroculturals, Commuterland Culturebuffs, Experience Seekers

Dormitory Dependables, Home & Heritage

Experience Seekers, Kaleidoscope Creativity

Trips & Treats

Dormitory Dependables

Frontline Families, Supported Communities

Demography

Youngest and oldest Urban Retirees or senior roles

Retirees and older age groups

2/3 under 45 Young families Employed and WFH

Families with older children

Slightly older population

Rural 1/3 with U16s Disabilities Manual/service jobs

Pre-pandemic

Highest for literature and classical music, high for dance, plays, visual arts

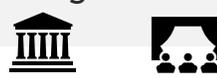
Highest for plays, high for film and performing arts

Highest engager overall and for most artforms

Highest for musical theatre, museums and high for other heritage sites

Low engaged, except for heritage and museums & film

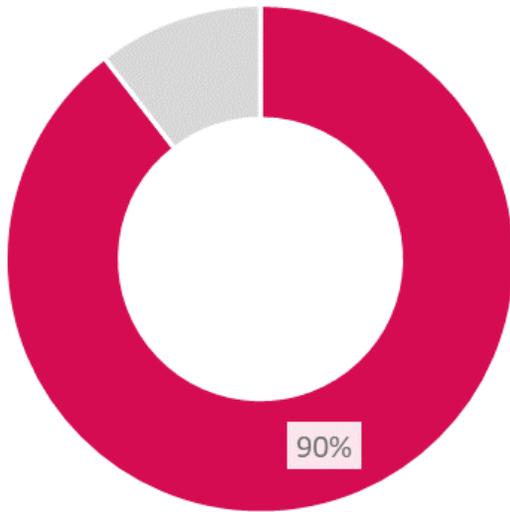
Low engaged except for outdoor arts, film & historic parks



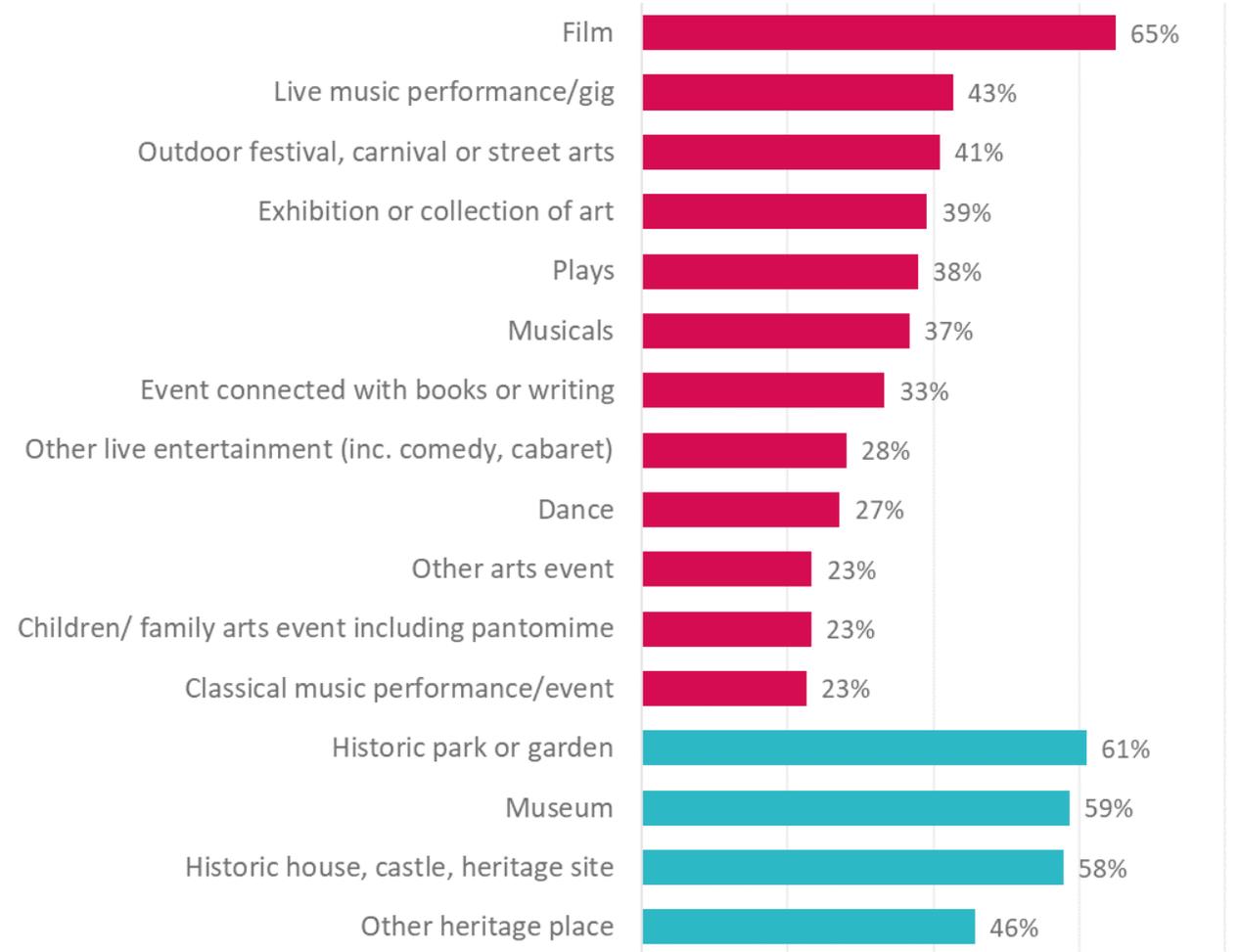
# Overall Engagement

# In-person Engagement

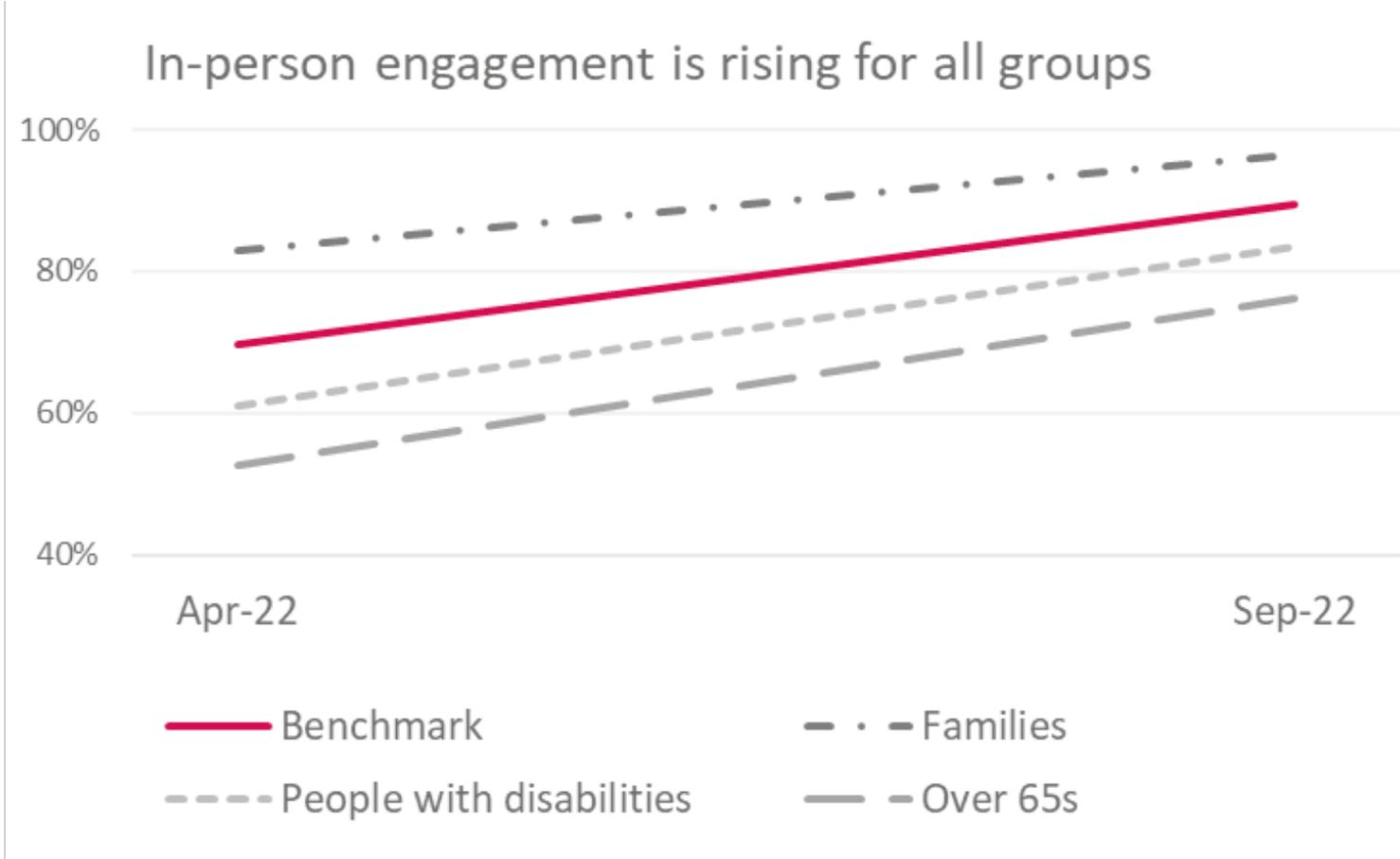
Any arts or heritage in-person in last 12 months



90% have done at least one arts or heritage activity in the last year

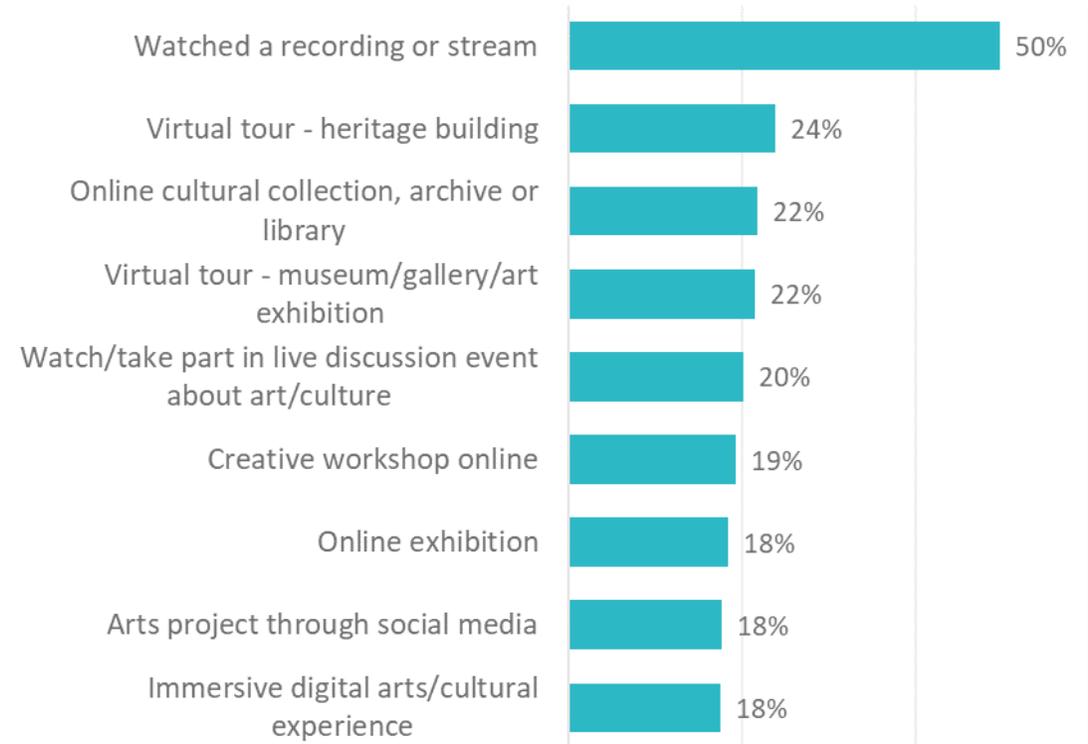
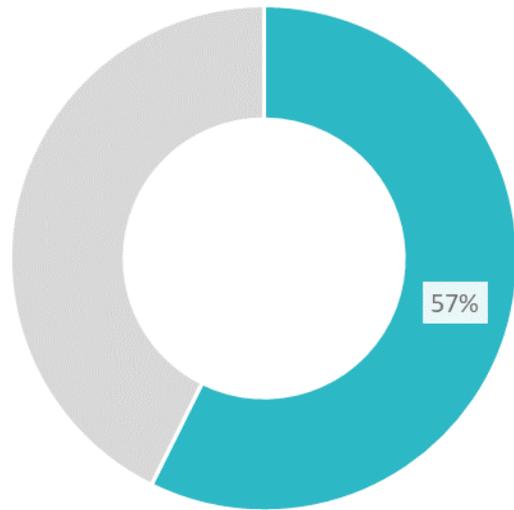


# In-person Engagement



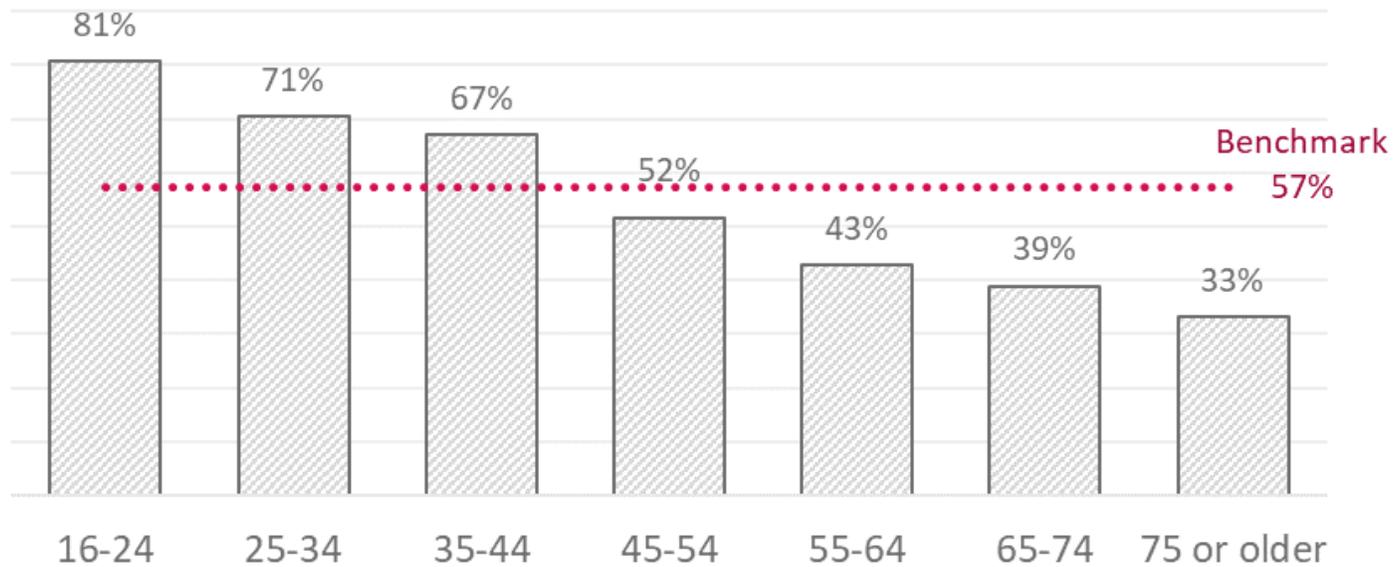
# Online Engagement

Any online arts or heritage activities in the last 12 months



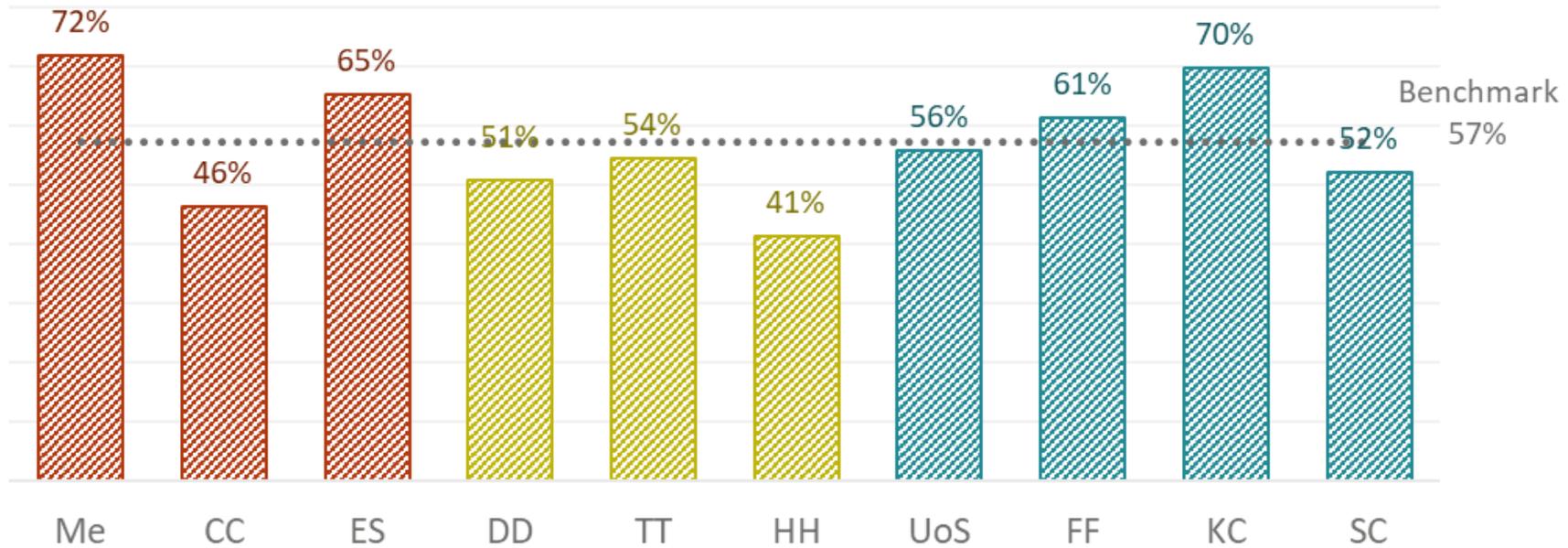
# Online Engagement

Online engagement decreases significantly with age



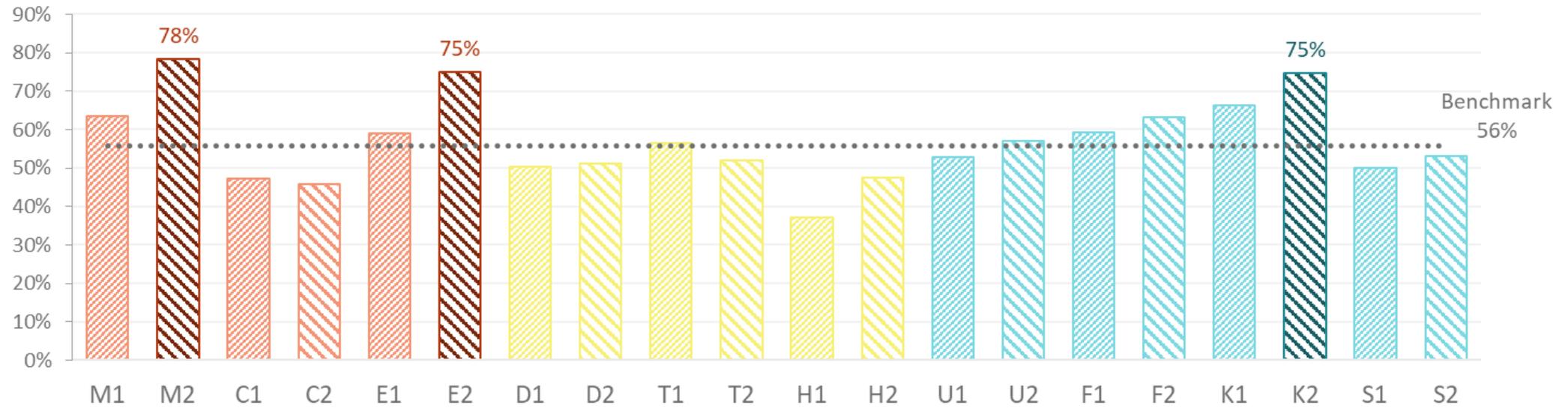
# Online Engagement

Online engagement is highest for Metroculturals, Experience Seekers and Kaleidoscope Creativity



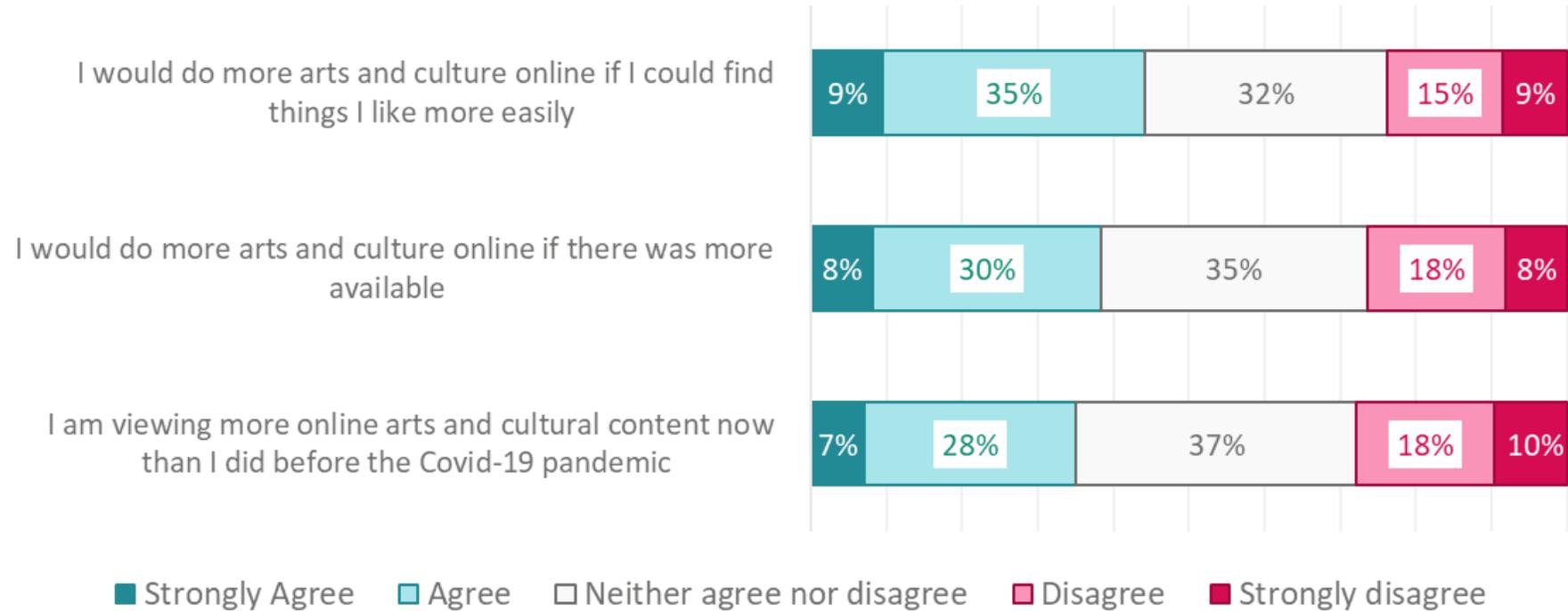
# Online Engagement

Online engagement is highest for M2, E2, K2

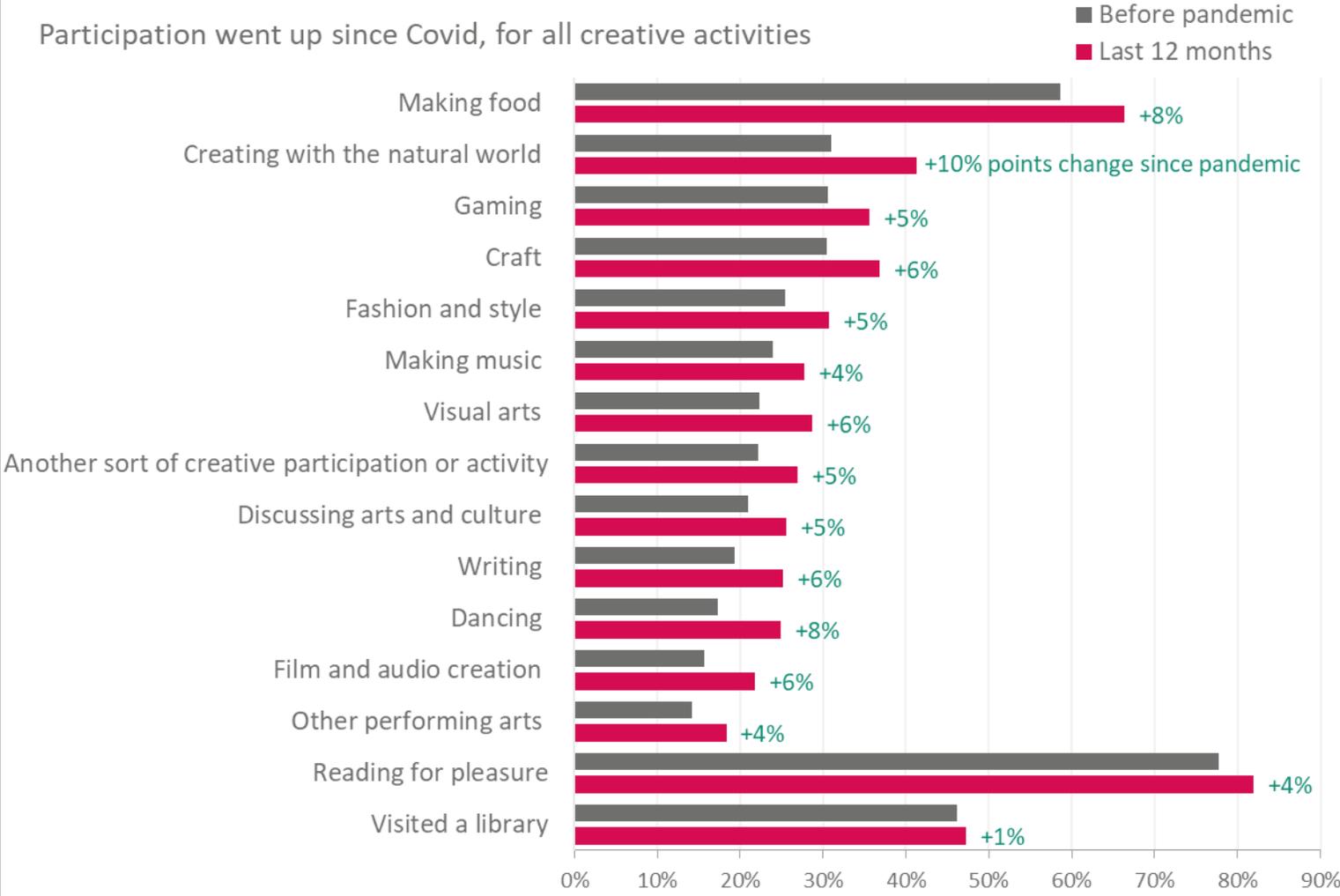


# Online Engagement

There is appetite for more online cultural engagement



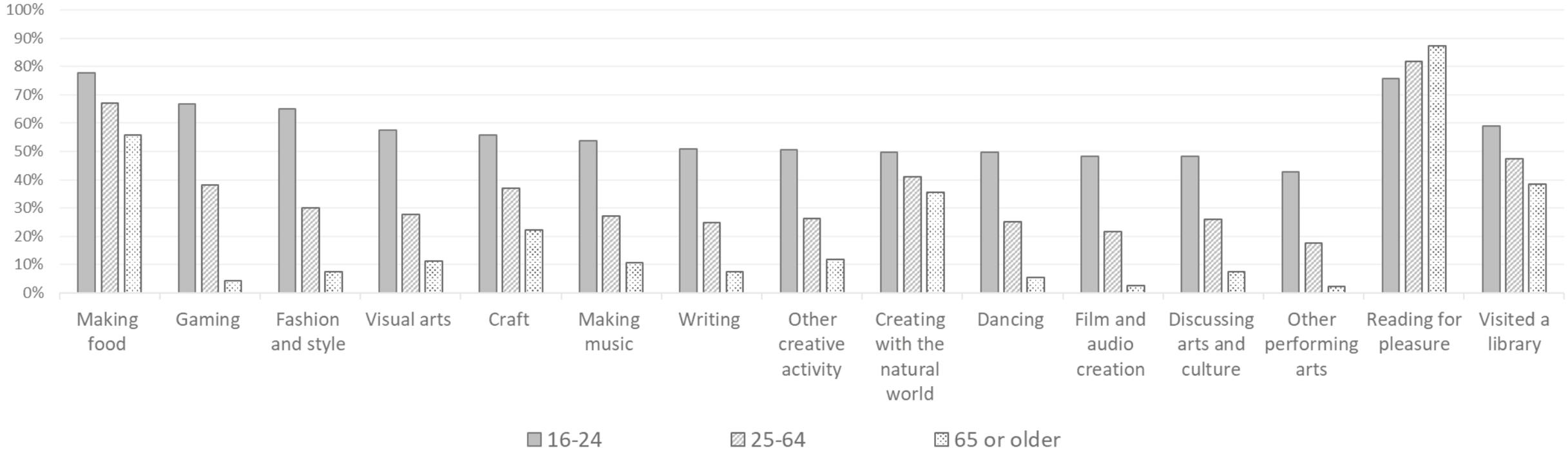
# Everyday Creativity





# Everyday Creativity

Young people were more likely to take part in creative activities - except for reading for pleasure  
% done in the last 12 months

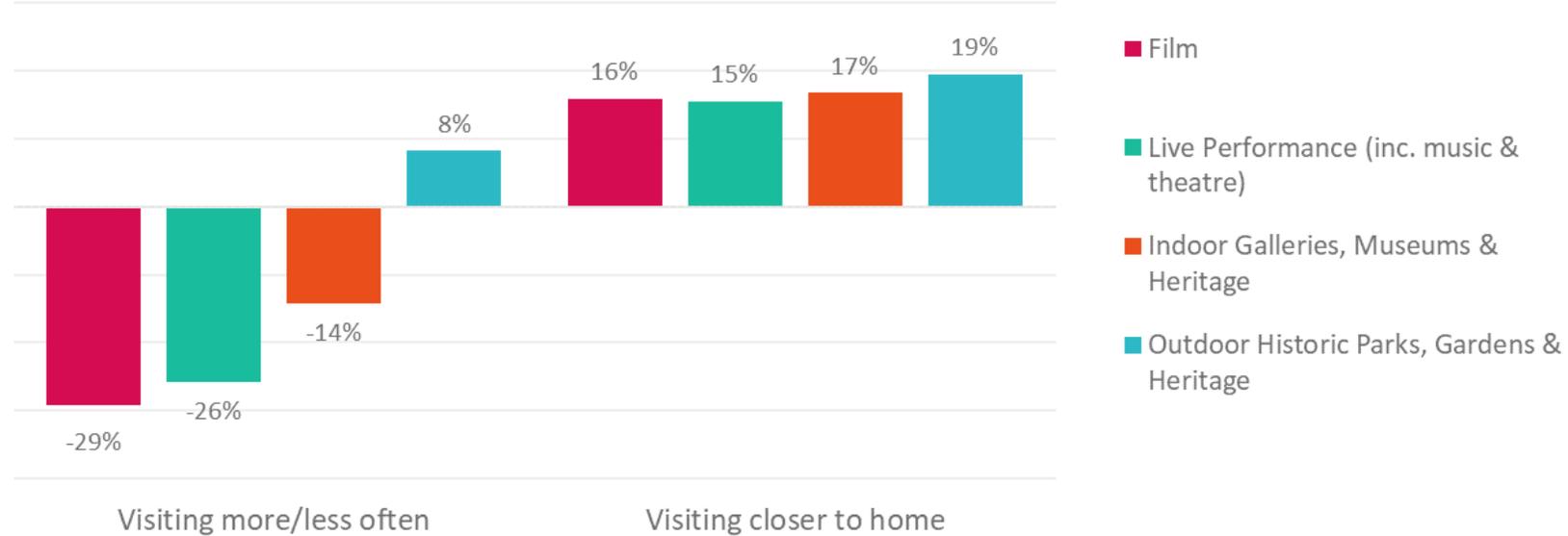


# Future Attendance

# Future attendance

Considering attending [artform] in the future. Compared to pre-pandemic, do you think you will do this more/less often? Further from/closer to home?

People are expecting to attend less often and closer to home  
Net % more minus less

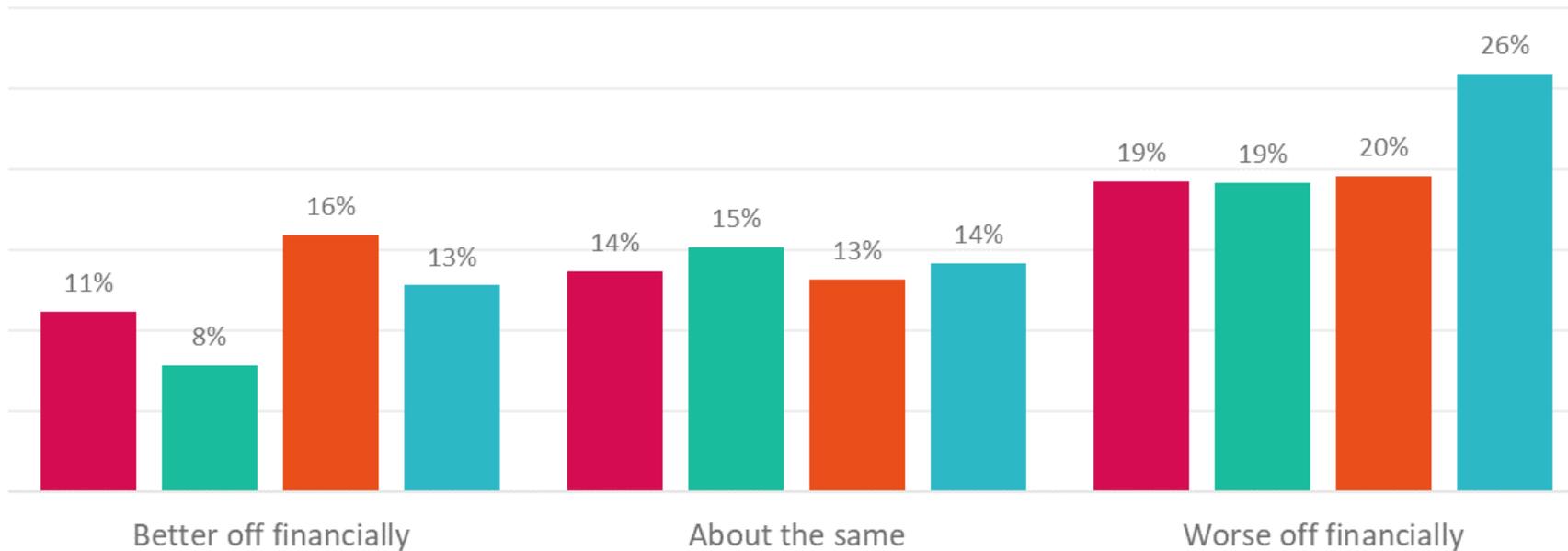


# Future attendance

Those worse off financially since the pandemic were more likely to stay closer to home for arts and culture

Net % closer minus further from home

- Film
- Live Performance (inc. music & theatre)
- Indoor Galleries, Museums & Heritage
- Outdoor Historic Parks, Gardens & Heritage

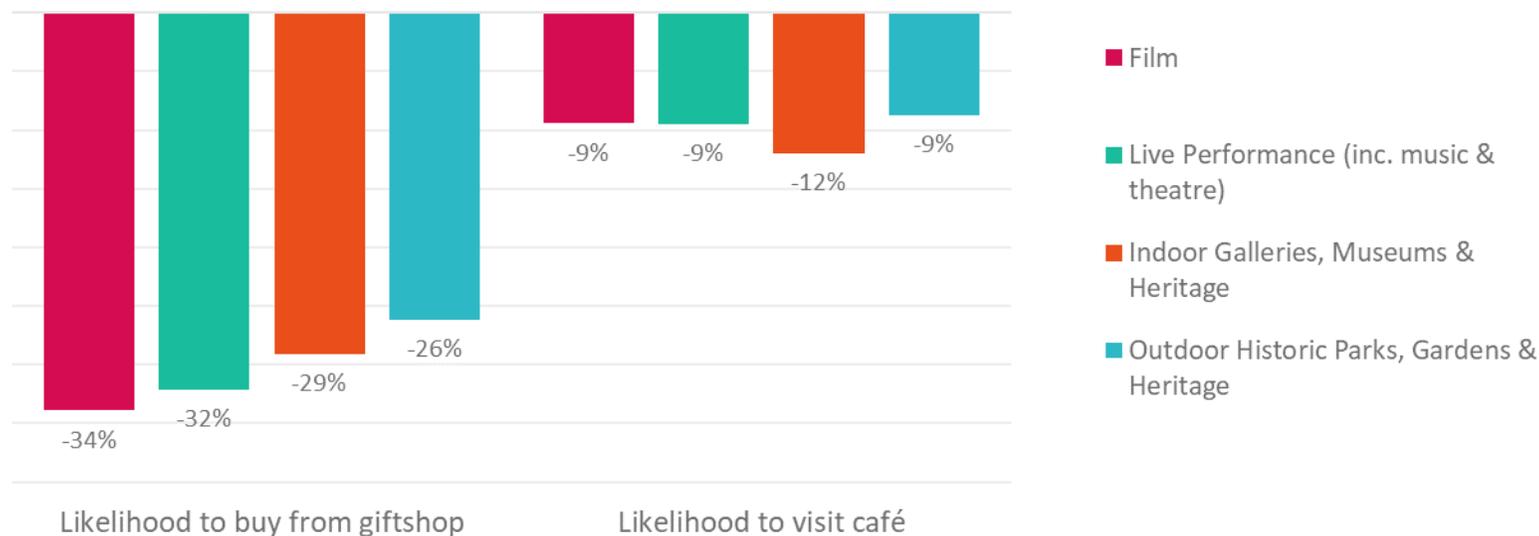


# Retail Offers: Shops & Cafes

# Shops & Cafes Attendance in the Future

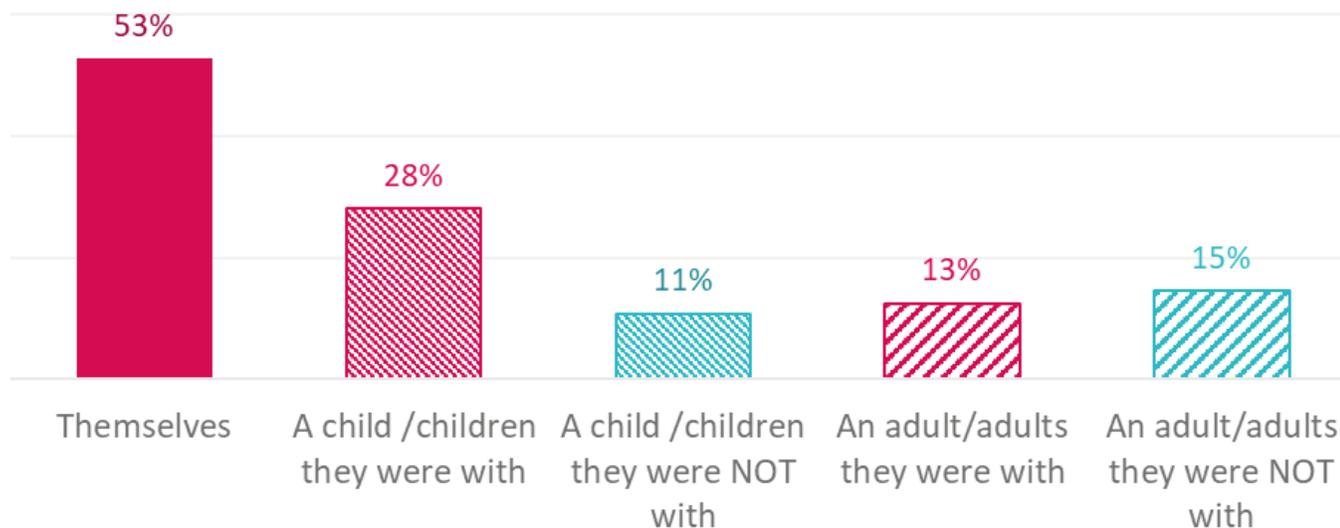
Considering attending [artform] in the future. Compared to pre-pandemic, do you think you are more/less likely to...

People are expecting to visit cafés and gift shops less often  
Net % more minus less



# Giftshop Purchases

Over half of visitors buy for themselves



Higher  
younger

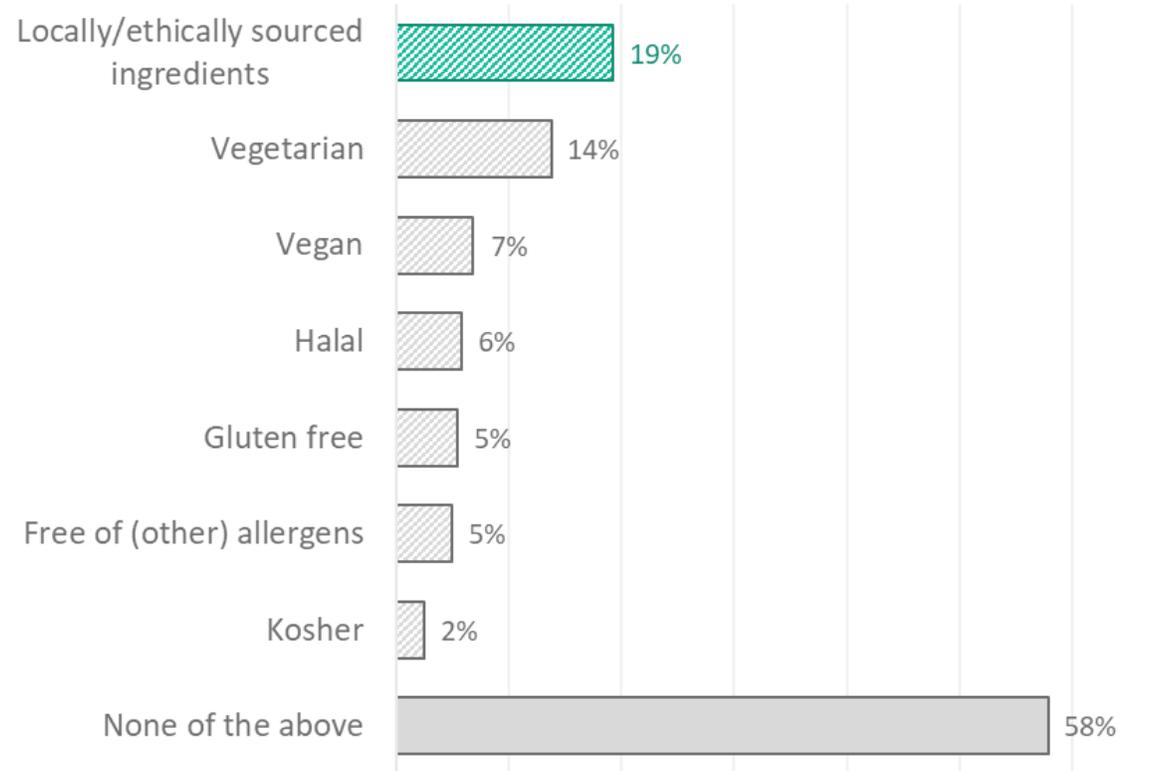
35-44: 48%

U65s: buy more for those *with*

O65s: buy more for those *not with*

# Café Purchases

4 in 10 have ethical preferences / dietary requirement when buying from a café



## Vegetarian Options:

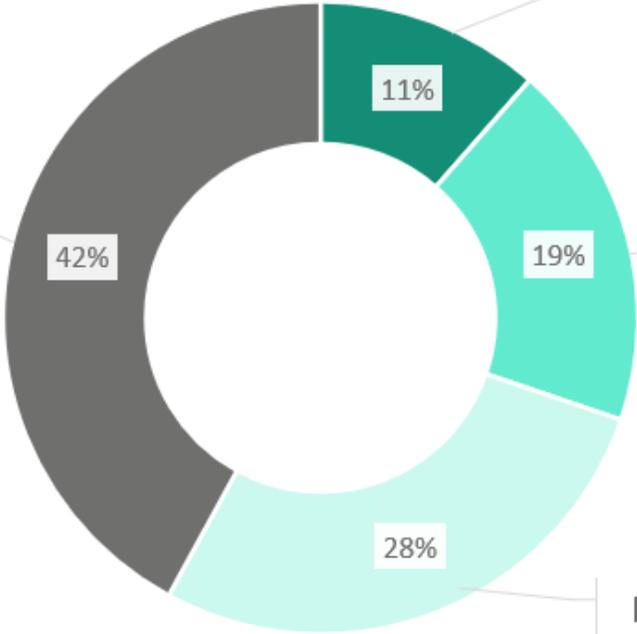
Asian/Asian British: 25%

Metroculturals: 20%

Female / London / 16-24s: 17%

# Café Purchases

Over half were prepared to pay more for greener alternatives



Prepared to pay 20-50% more

Prepared to pay 10-20% more

Prepared to pay up to 10% more

16-24: 22%  
Families: 19% (esp. youngest 6-10: 22%)  
Lower eng'd: 15%

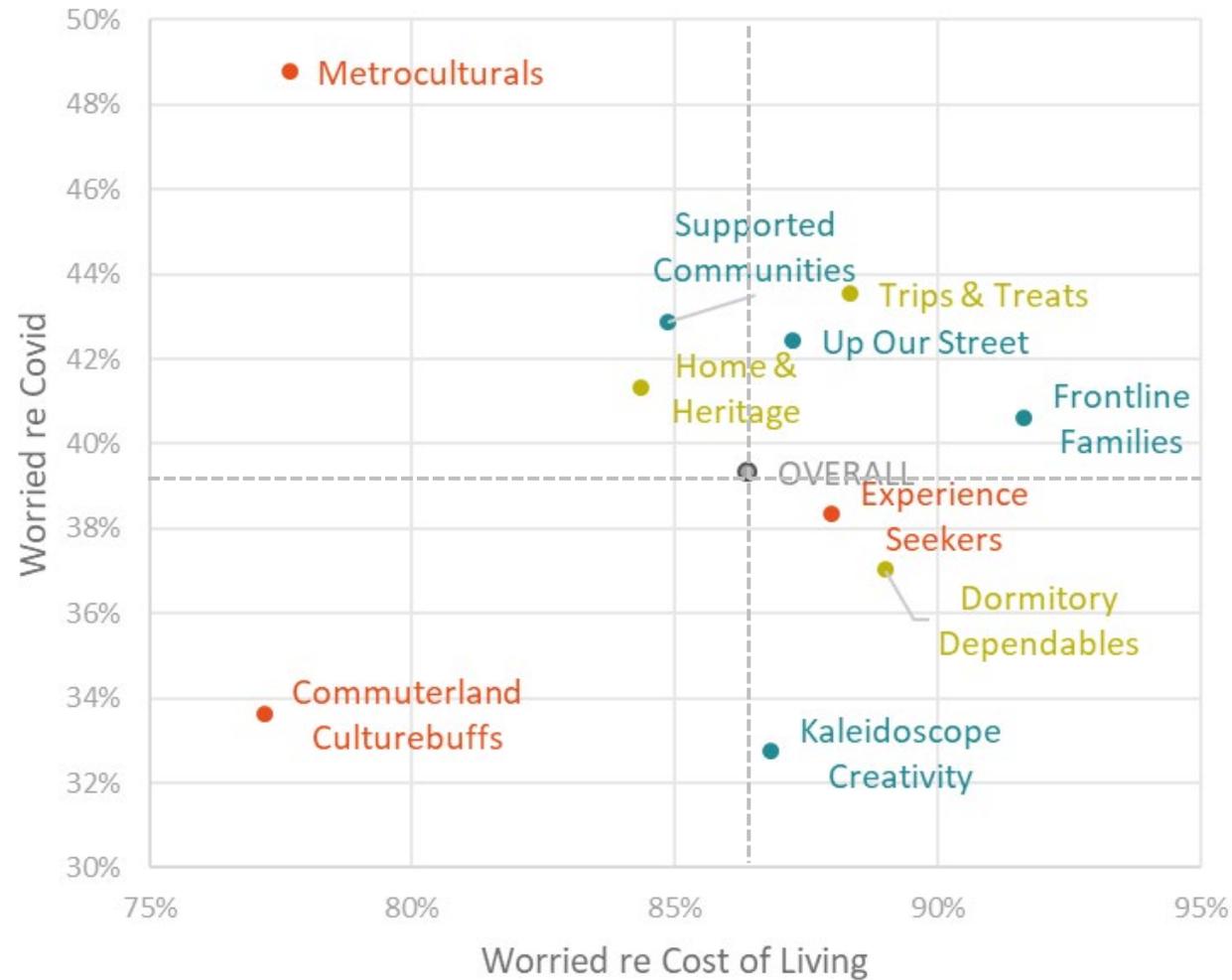
But prefer: 21%  
No preference: 17%  
Prefer non-green: 5%

No in person eng't last 12 months: 60%  
65+: 52%  
'Worse off': 48%

Response: Tom Dykes,  
Association for Cultural Enterprises

# Implications

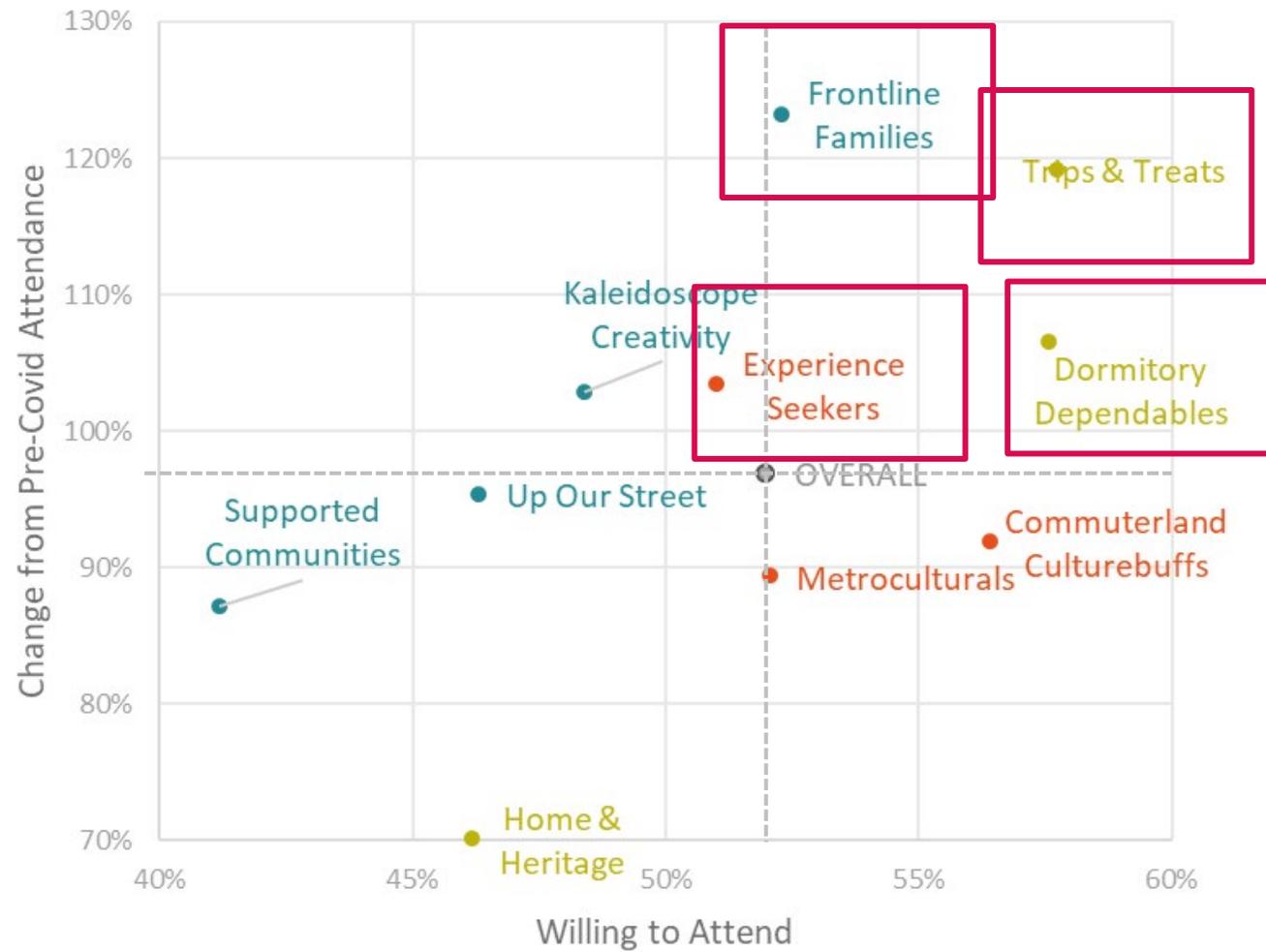
# Implications



# Implications



# Implications



## Implications

- Concern re Covid dropping
- Willingness to attend - and attendance - rising
- Cost of living causing widespread concern -will affect leisure spend
- ...inc. in shops (esp.) and cafes - but desire for green/alternative options
- Online engagement still high - but gaps re awareness
- Participation growing (and wider than previous measures)
- People expect to attend less and more locally
- Risk that Cost of living is targeting precisely those most likely otherwise to attend (given Covid etc)

Q&A

## From Discussion

- Concern discussed over the fact the highest returners/engagers post-Covid (e.g. families) are the most hit by the cost of living, a worry for organisations going into winter
- Some people thought the situation for cultural venues wasn't as bad as expected, with one example given of a rural art exhibition which had far more visitors recently than other years.
- Discussion around potentially the government suggesting cultural spaces could be 'warm spaces' this winter, without discussing the costs associated with this. Someone added Arts Council England are running a survey with questions about this that people should get involved in ([Arts Council England Survey](#)).

# Thank you

[theaudienceagency.org](http://theaudienceagency.org)

[oliver.mantell@theaudienceagency.org](mailto:oliver.mantell@theaudienceagency.org)

[@audienceagents](#) [@OliverMantell](#)

 the audience agency