Wave 7 Findings

from the Cultural Participation Monitor

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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.

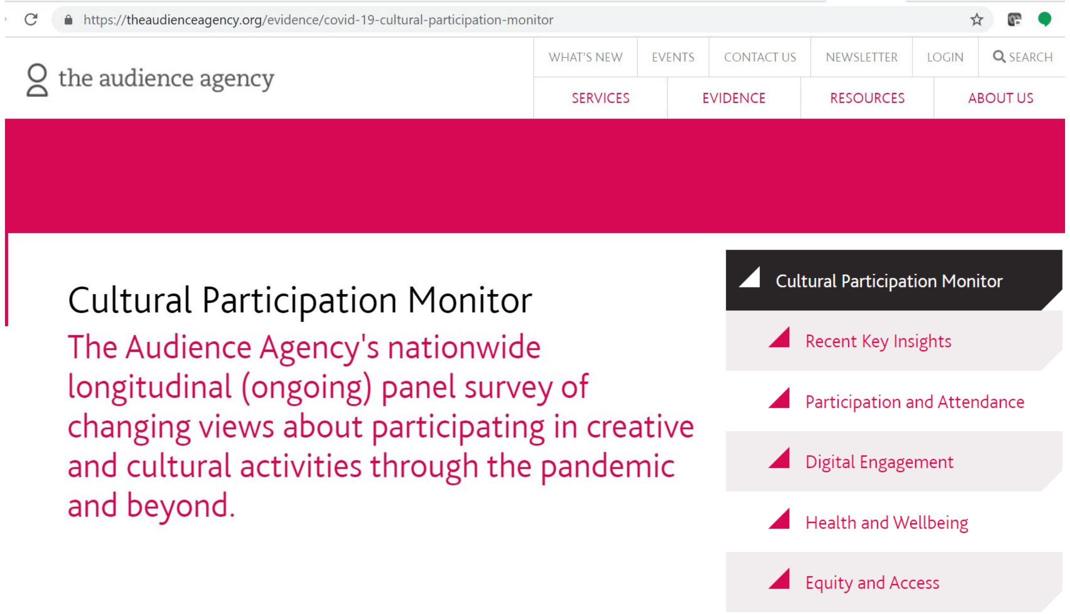
About the Cultural Participation Monitor

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.



For overall findings from Wave 1-7 and by theme, see theaudienceagency.org/evidence

Main Themes for This Session

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


THE STAGE News Reviews More Jobs Suppliers Tickets Training Events

Topics EDINBURGH FRINGE WEST END MUSICAL THEATRE BACKSTAGE & TECHNICAL OBITUARIES &

Audiences expect to spend less on art as cost-of-living crisis bites – survey

NEWS OCT 19, 2022 BY MATTHEW HEMLEY

Attitudes to Covid

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Attitudes to Covid

Wave 1: Oct-Nov 2020

Wave 2: Feb 2021

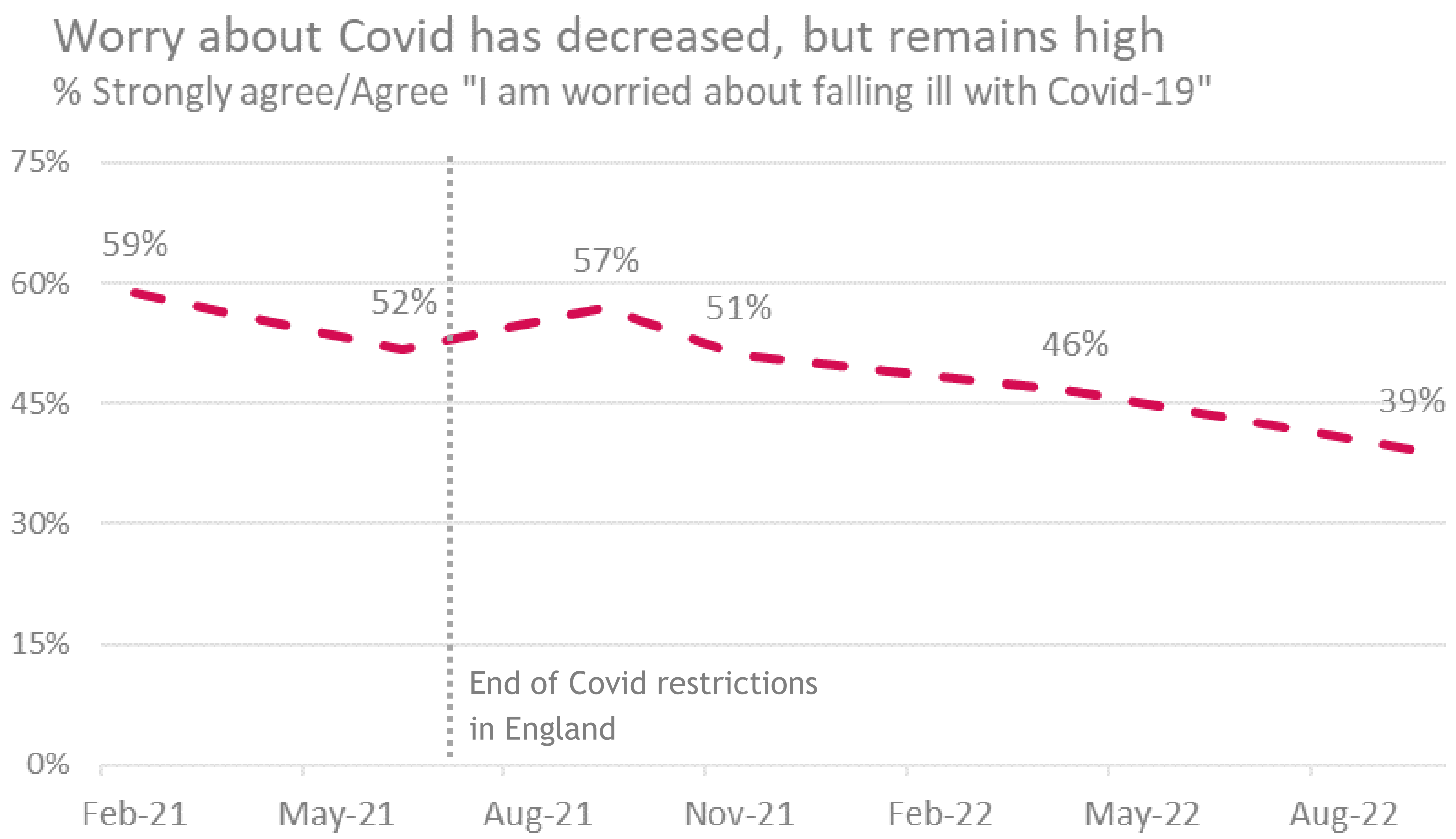
Wave 3: Jun 2021

Wave 4: Sept/Oct 2021

Wave 5: Nov 2021

Wave 6: Apr 2022

Wave 7: Sep 2022



Willingness to Attend

Wave 1: Oct-Nov 2020

Wave 2: Feb 2021

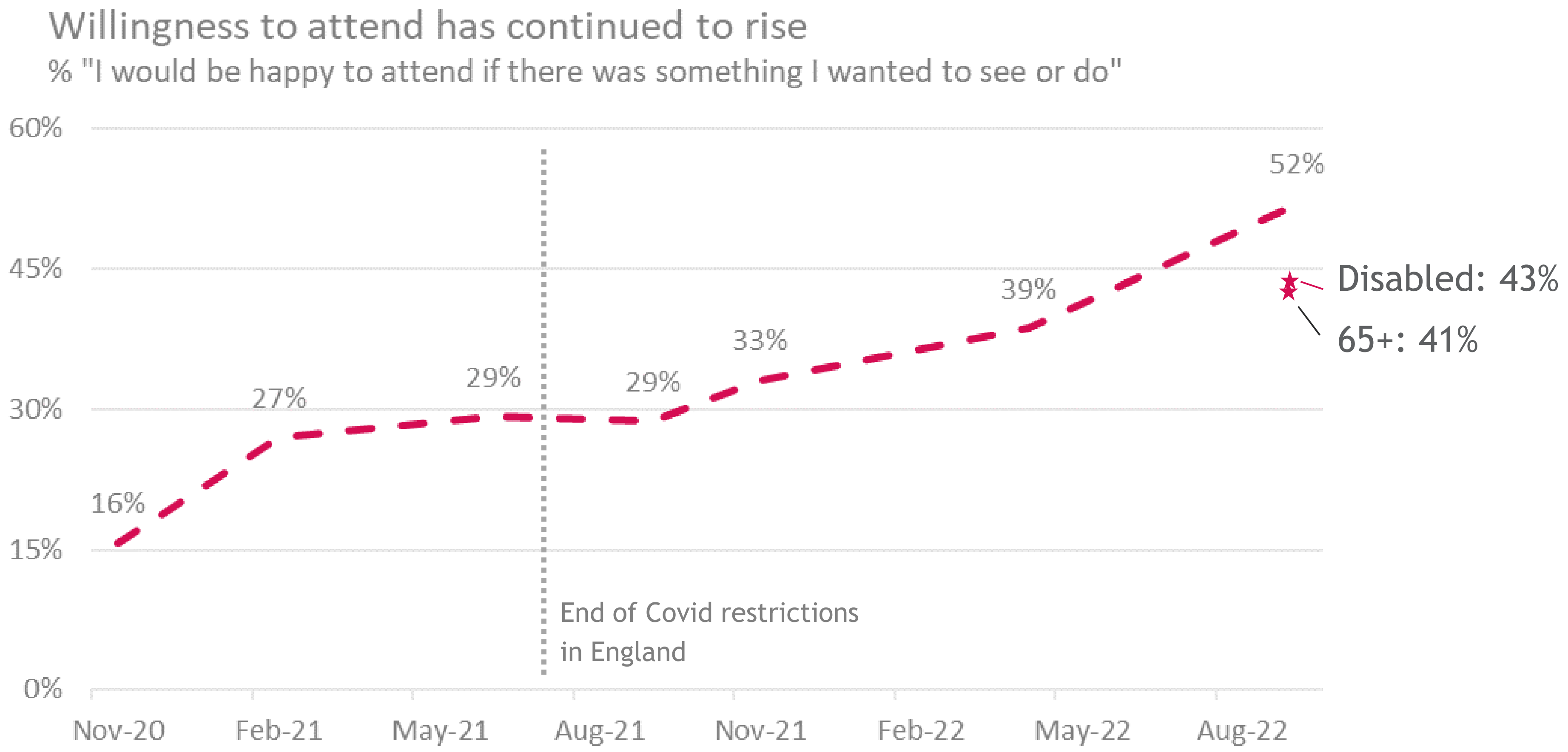
Wave 3: Jun 2021

Wave 4: Sept/Oct 2021

Wave 5: Nov 2021

Wave 6: Apr 2022

Wave 7: Sep 2022



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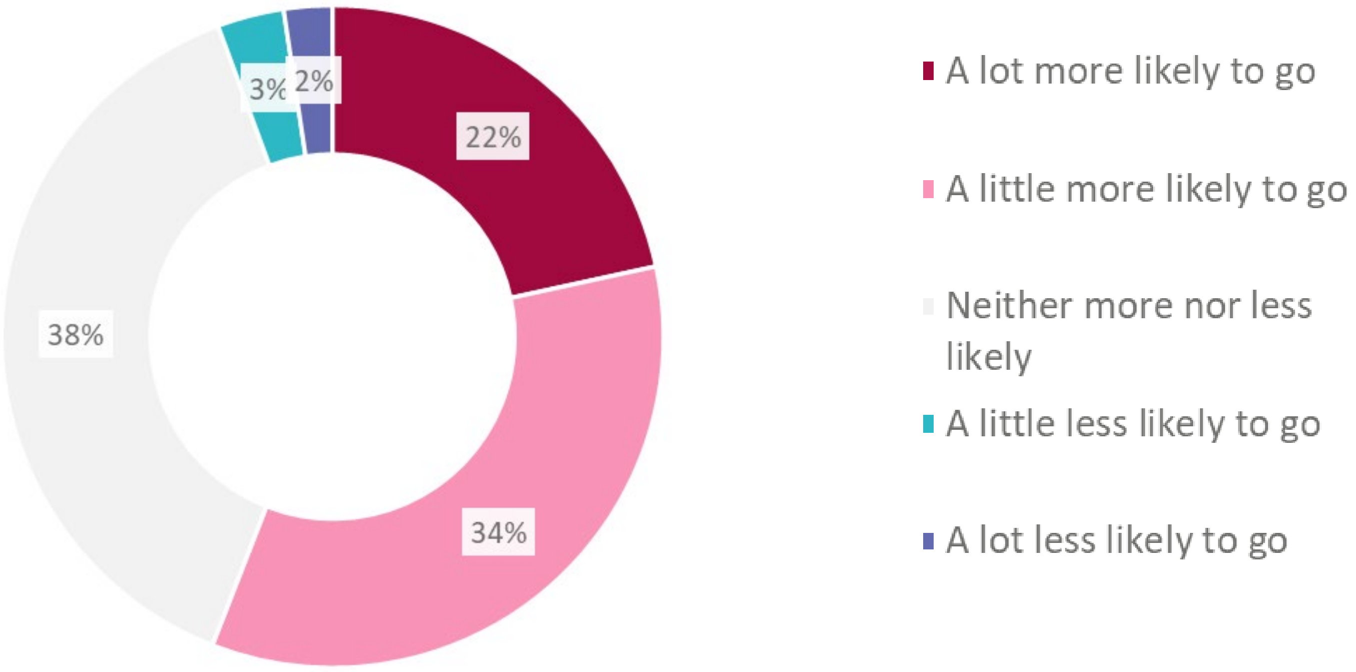
Covid Safety Measures

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

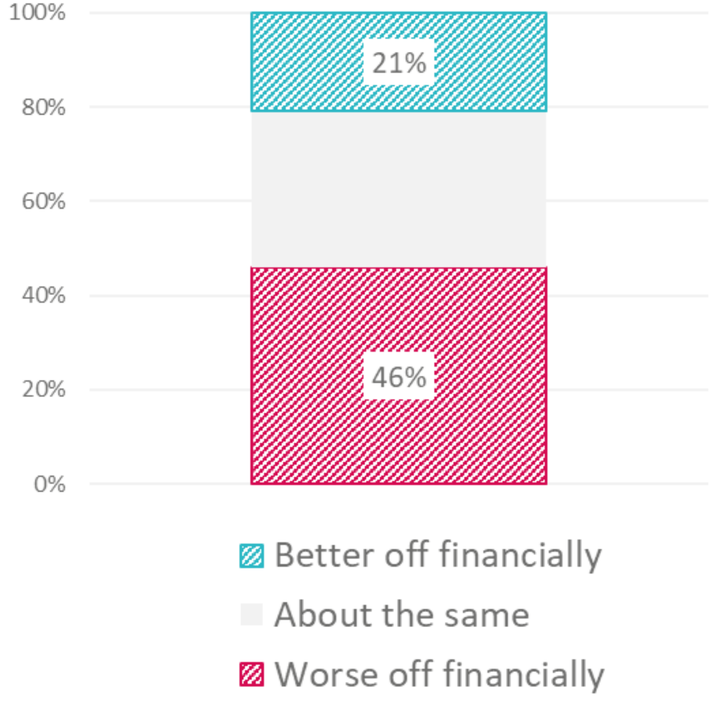
Over half would be more likely to attend with Covid safety measures in place



Cost of Living

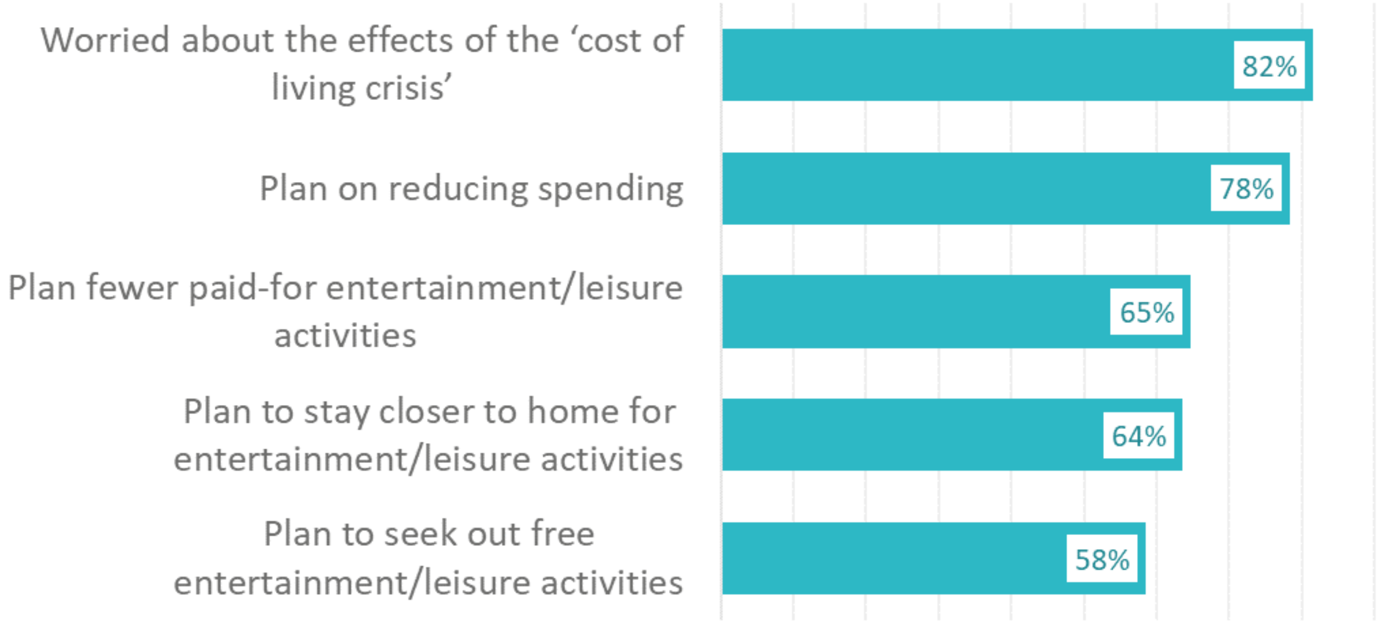
Cost of Living

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



Most are worried about the cost of living, and plan on reducing speding, including by cutting back on leisure

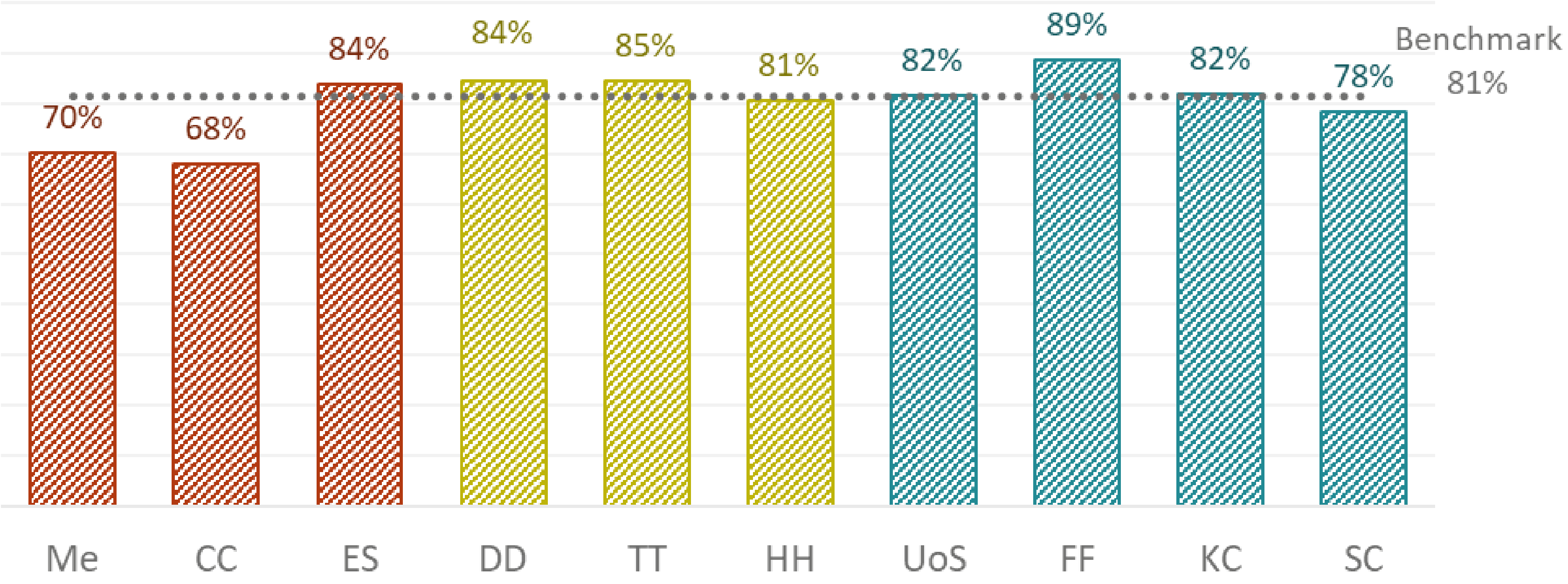
Net % Agree



Cost of Living

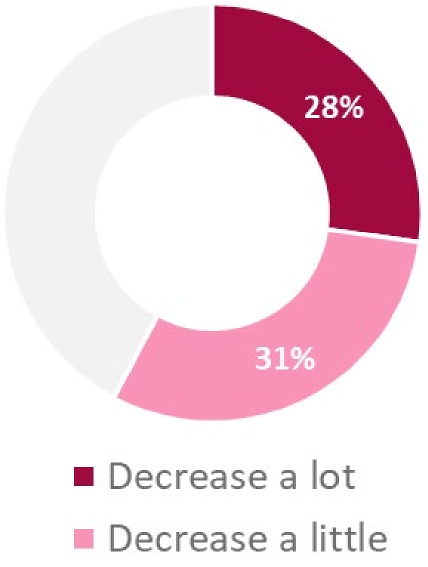
Metroculturals and Commuterland Culturebuffs are slightly less likely to be worried about the cost of living crisis

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



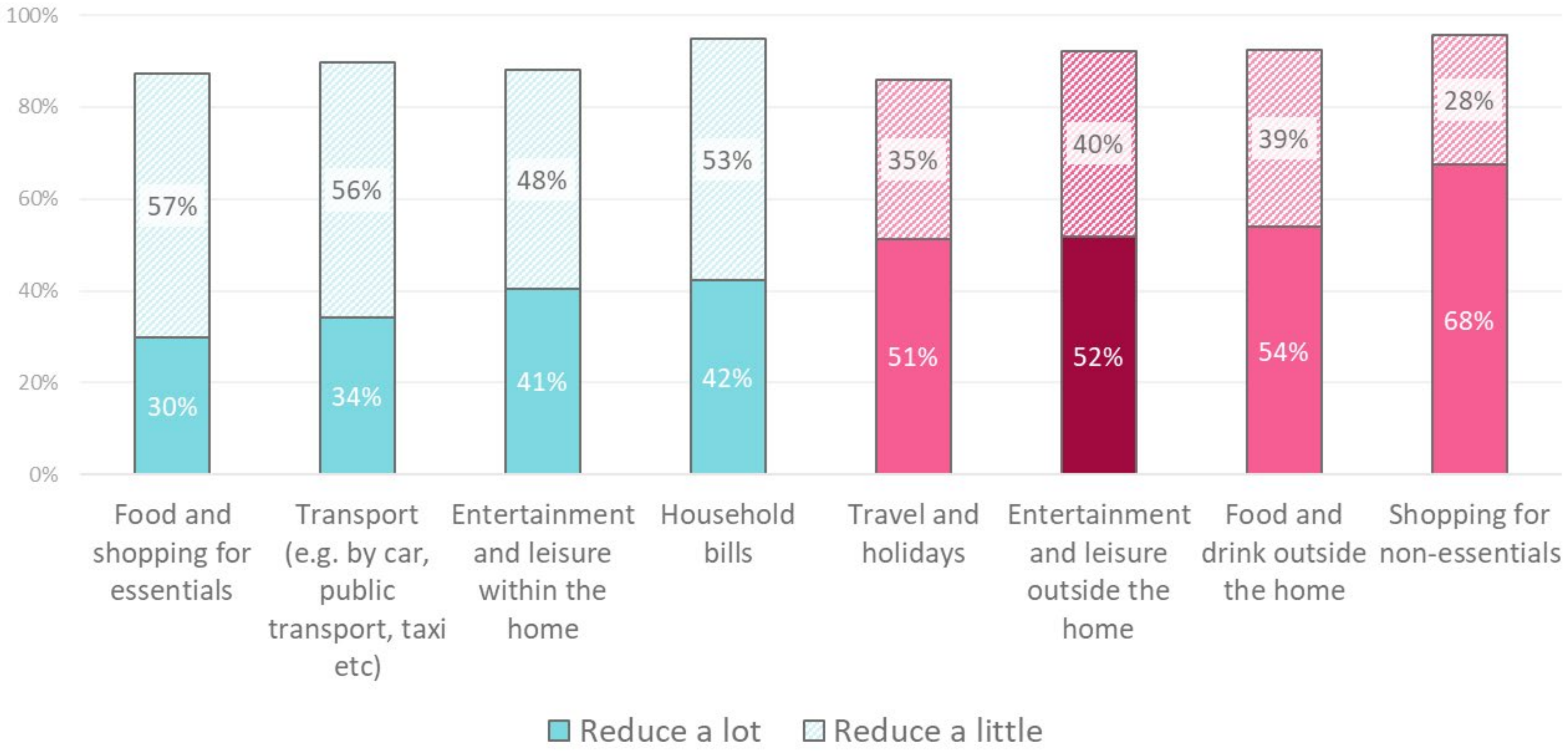
Cost of Living

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



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
Demo-graphy	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

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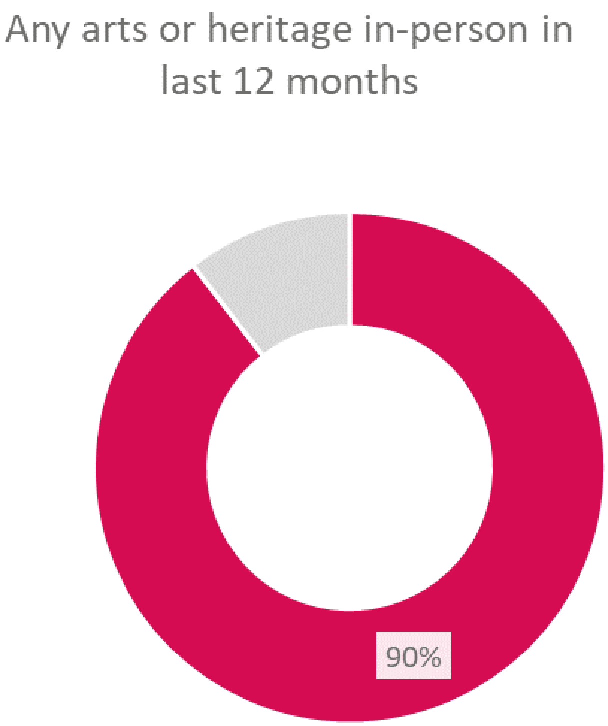
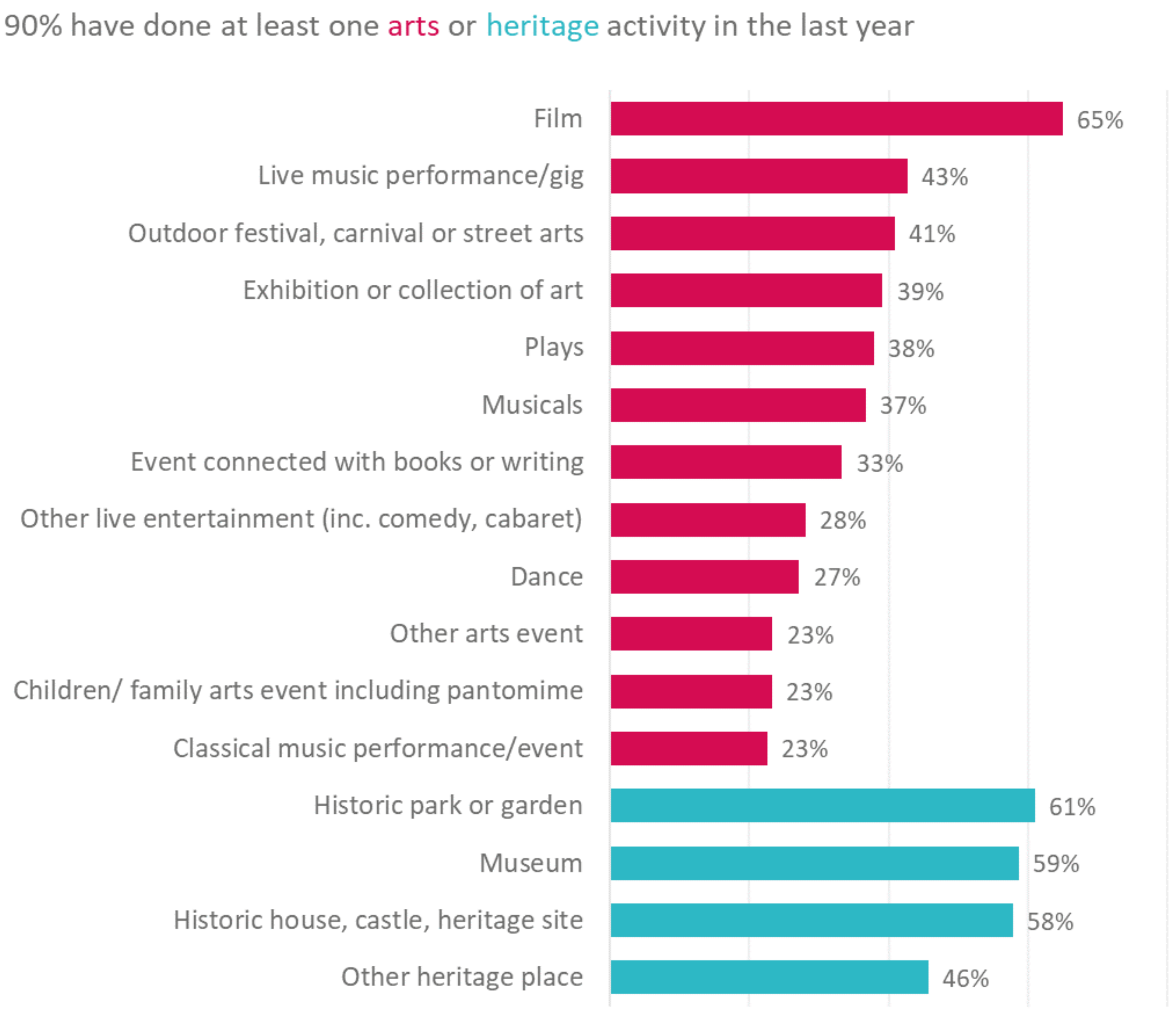
In-person Engagement





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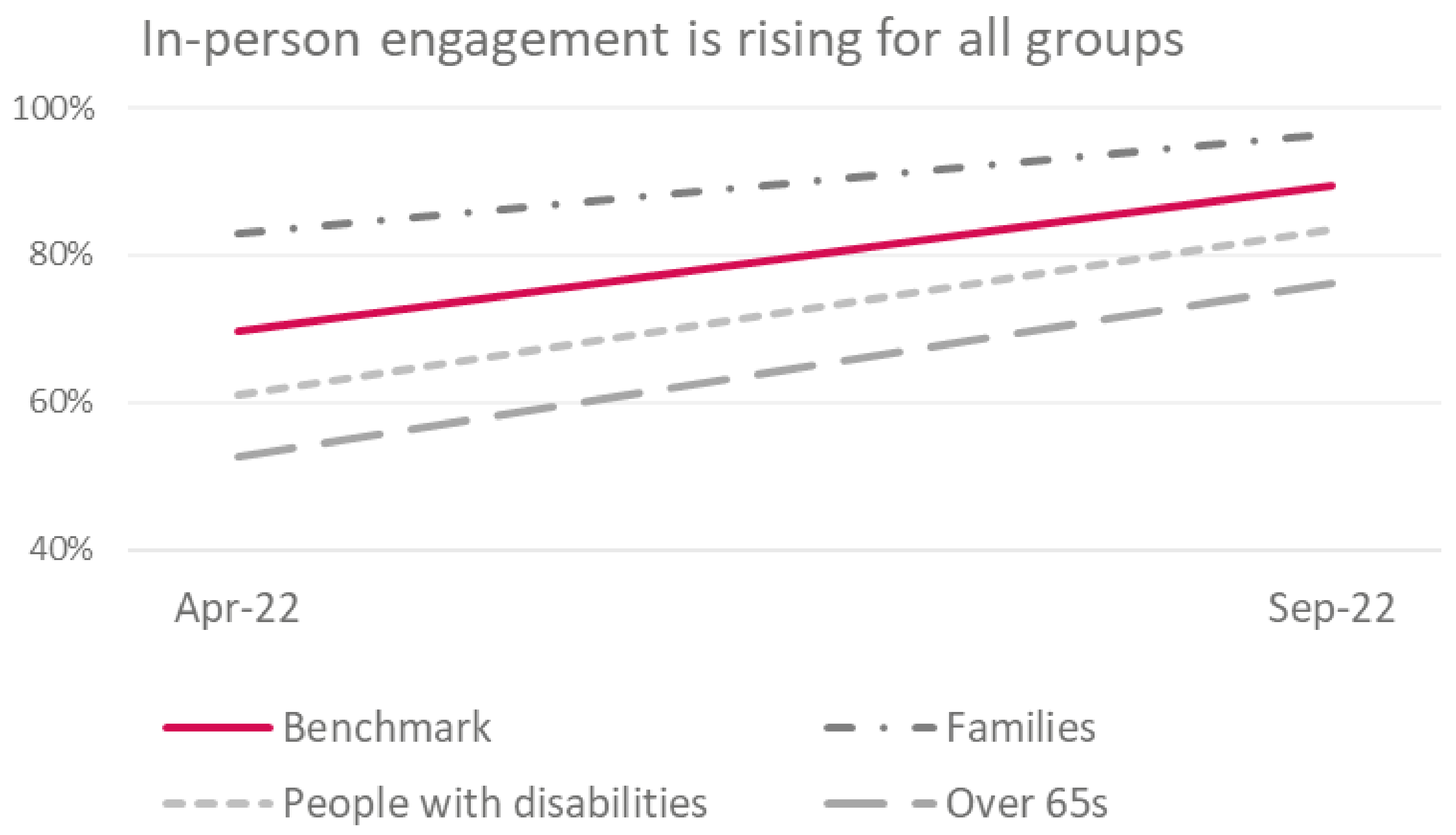
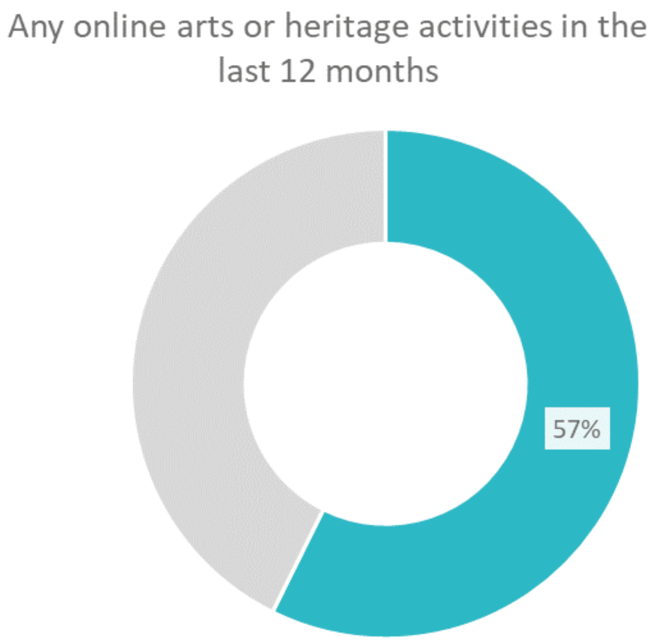
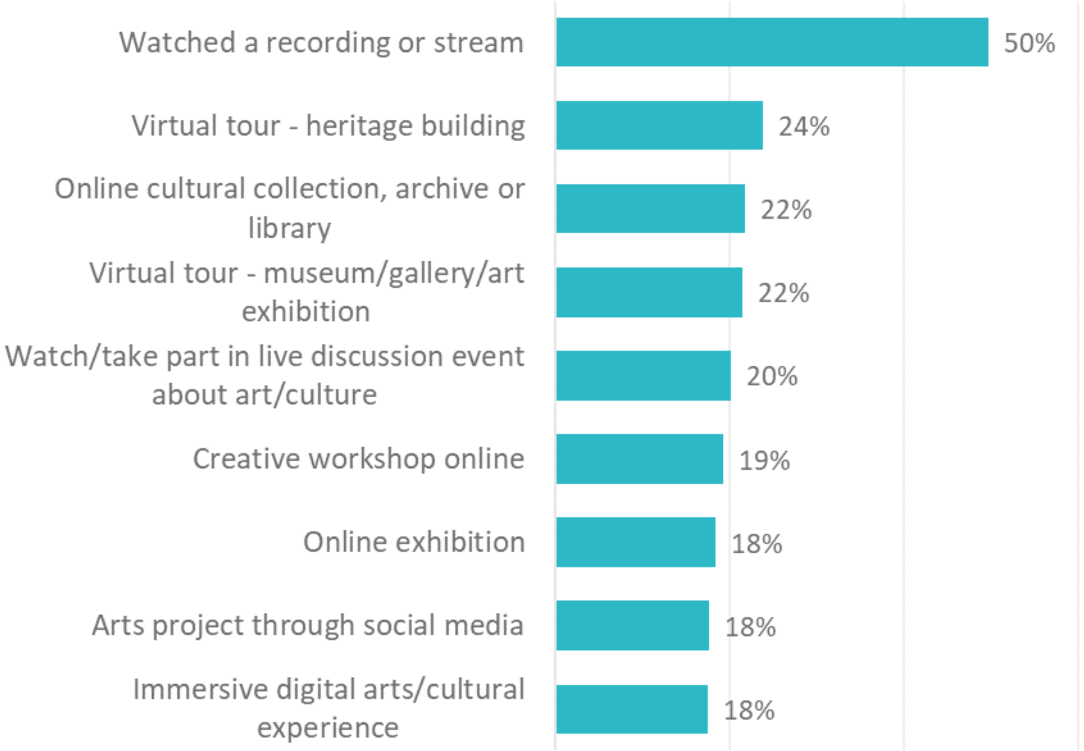


Online Engagement





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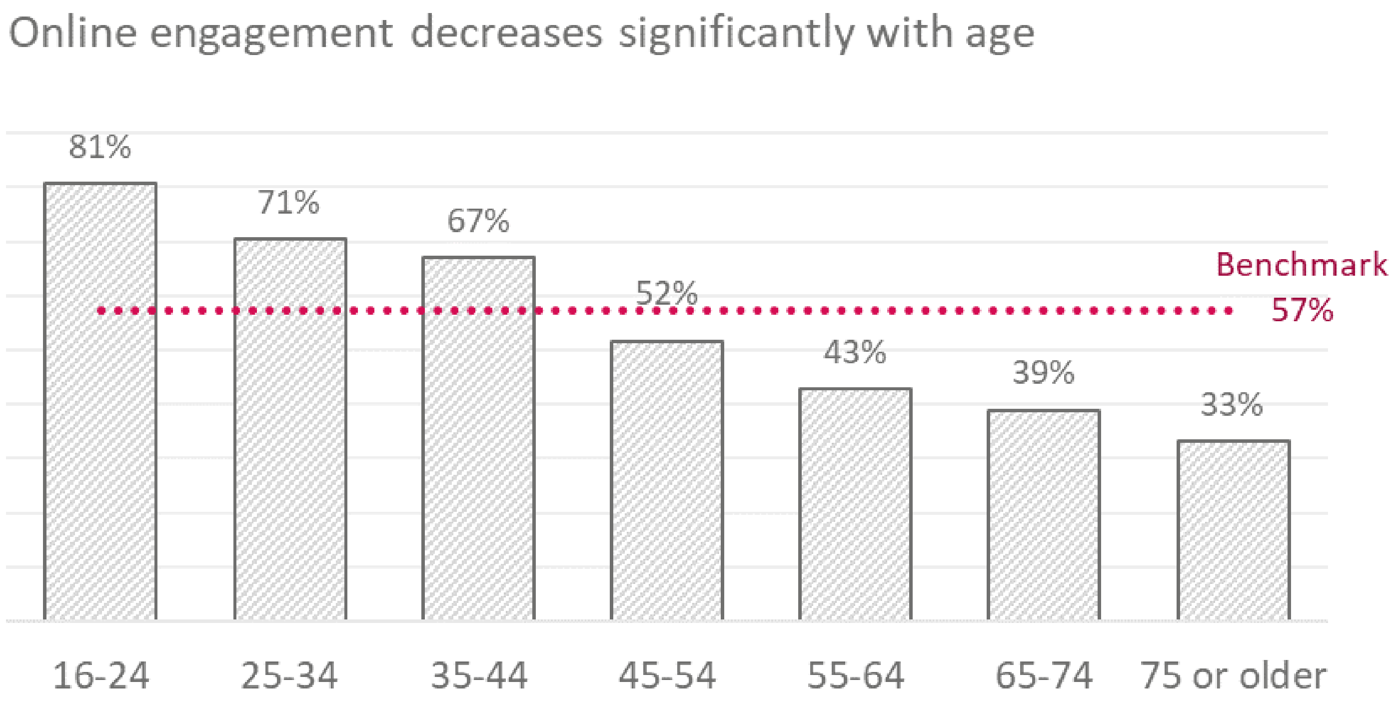
Online Engagement



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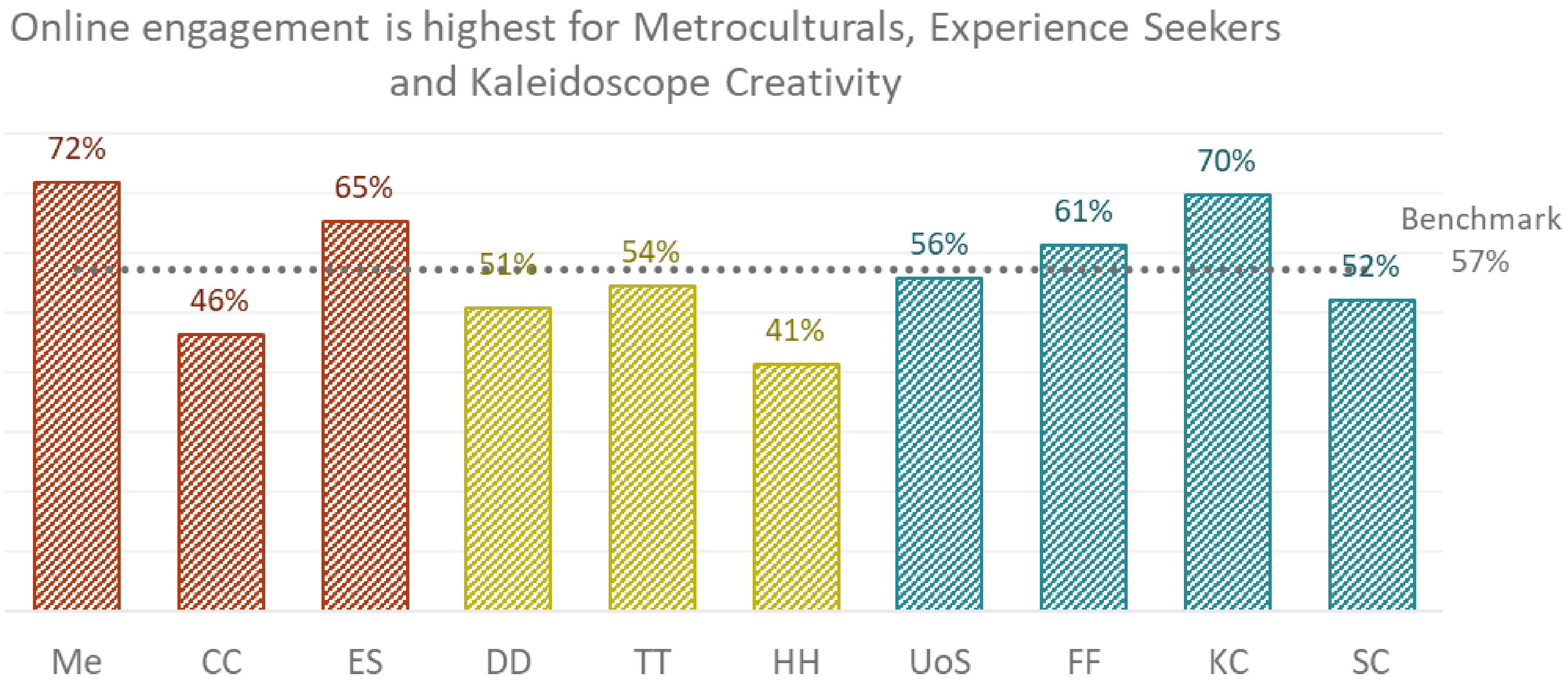

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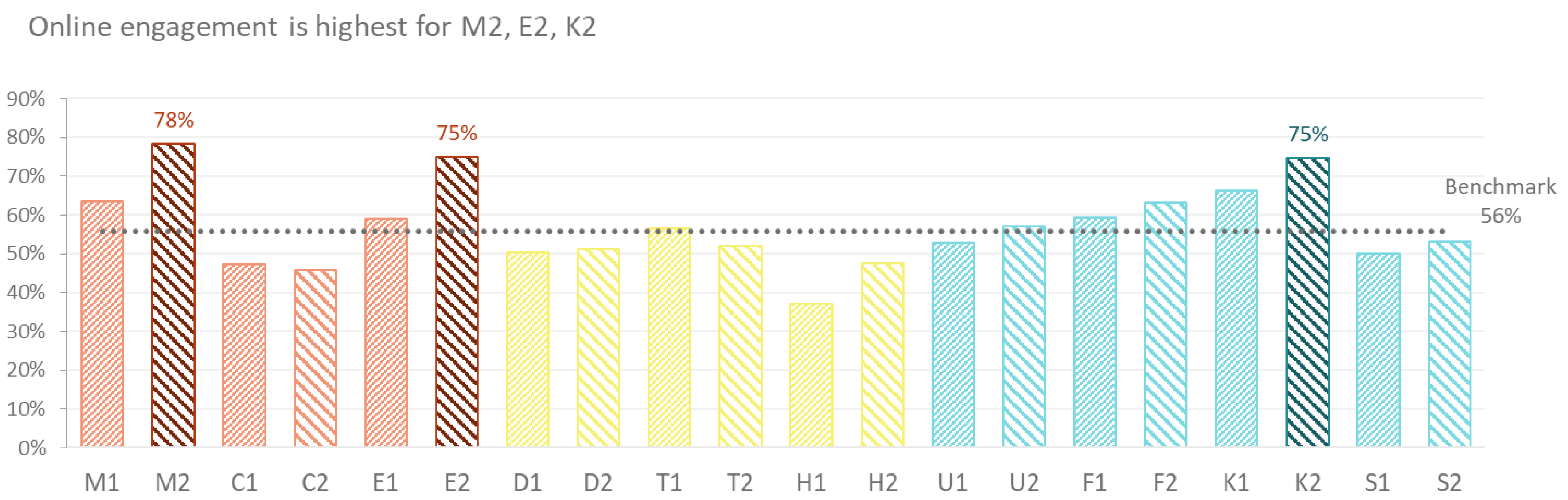

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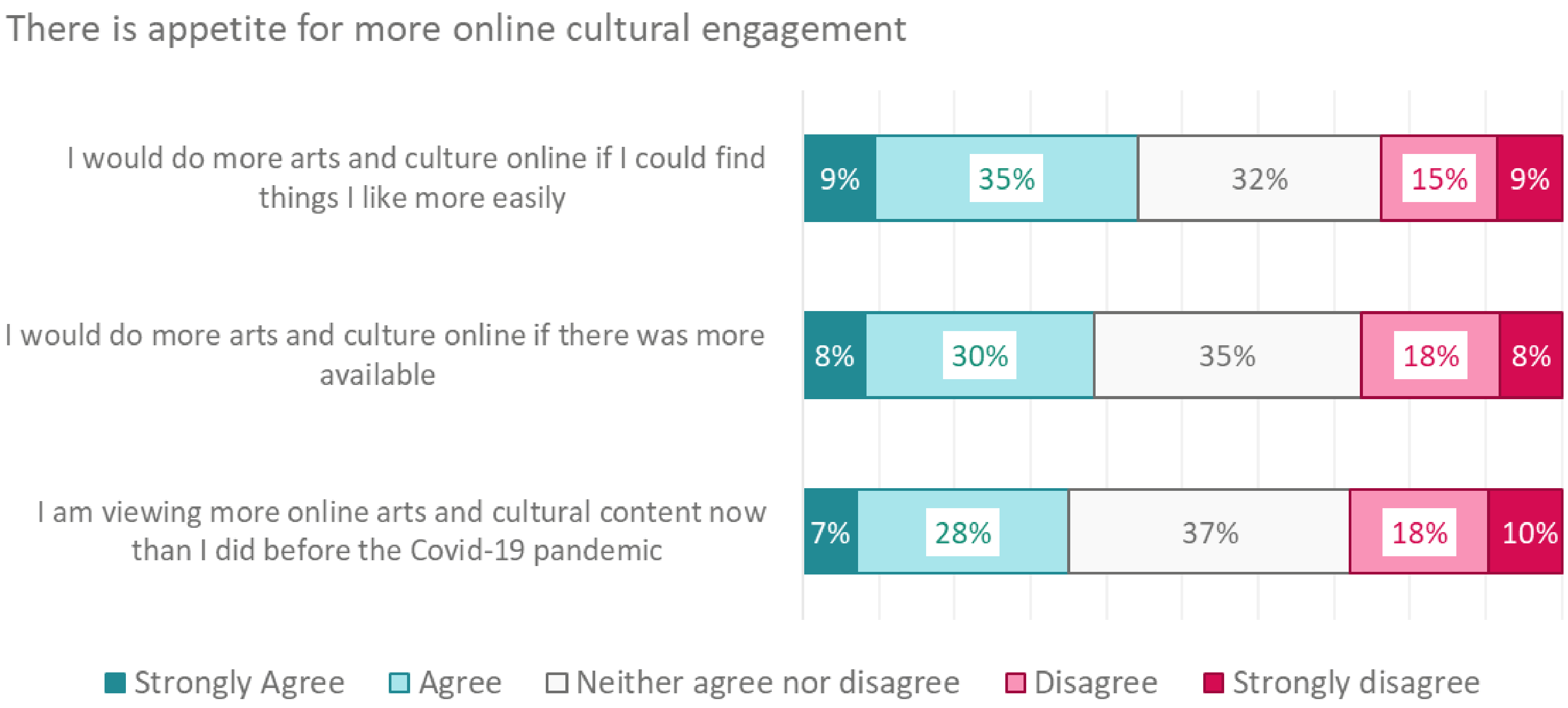
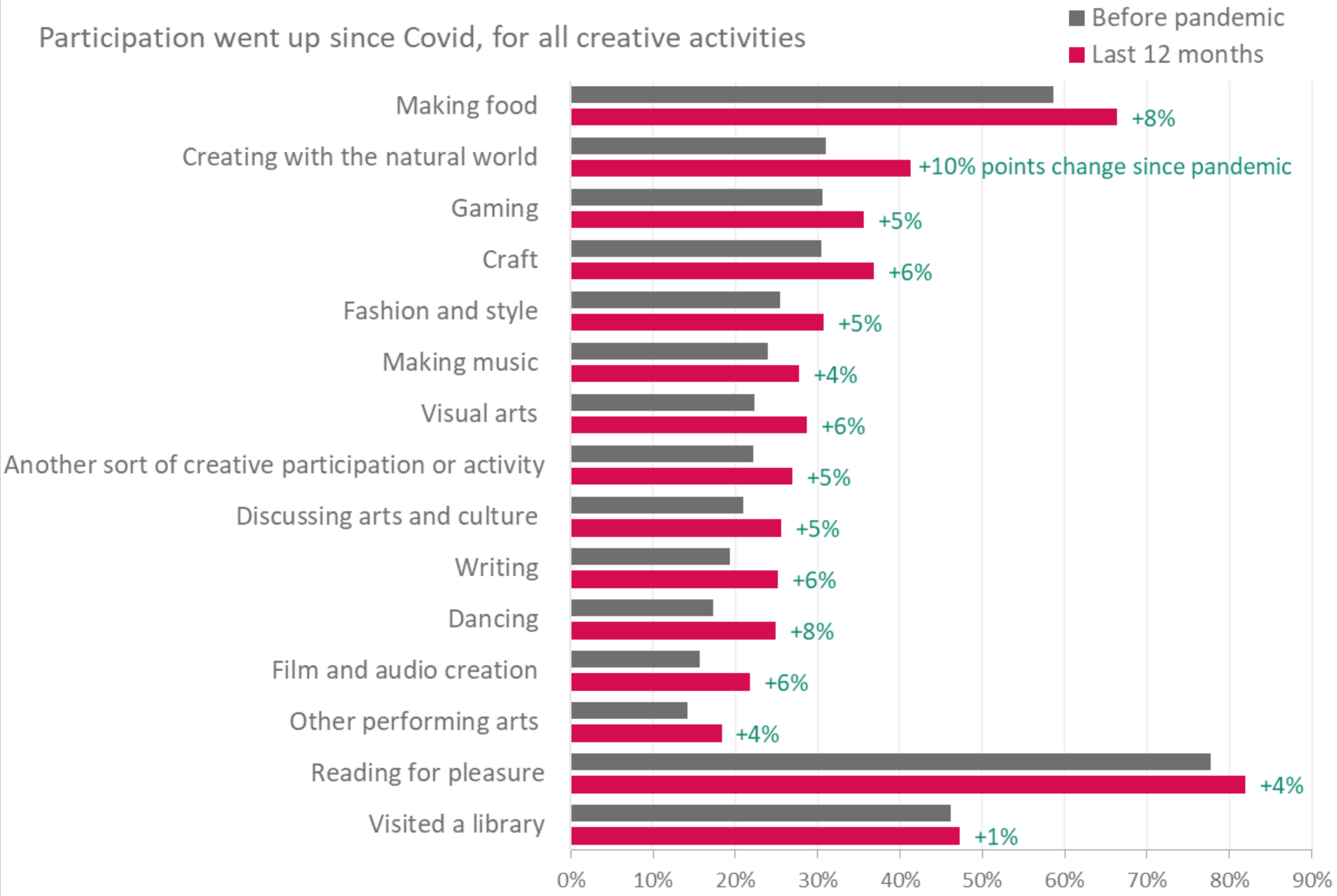
Online Engagement



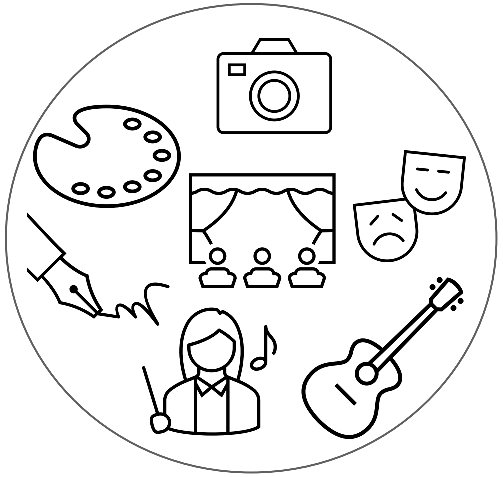
Everyday Creativity



Everyday Creativity

Wave 6

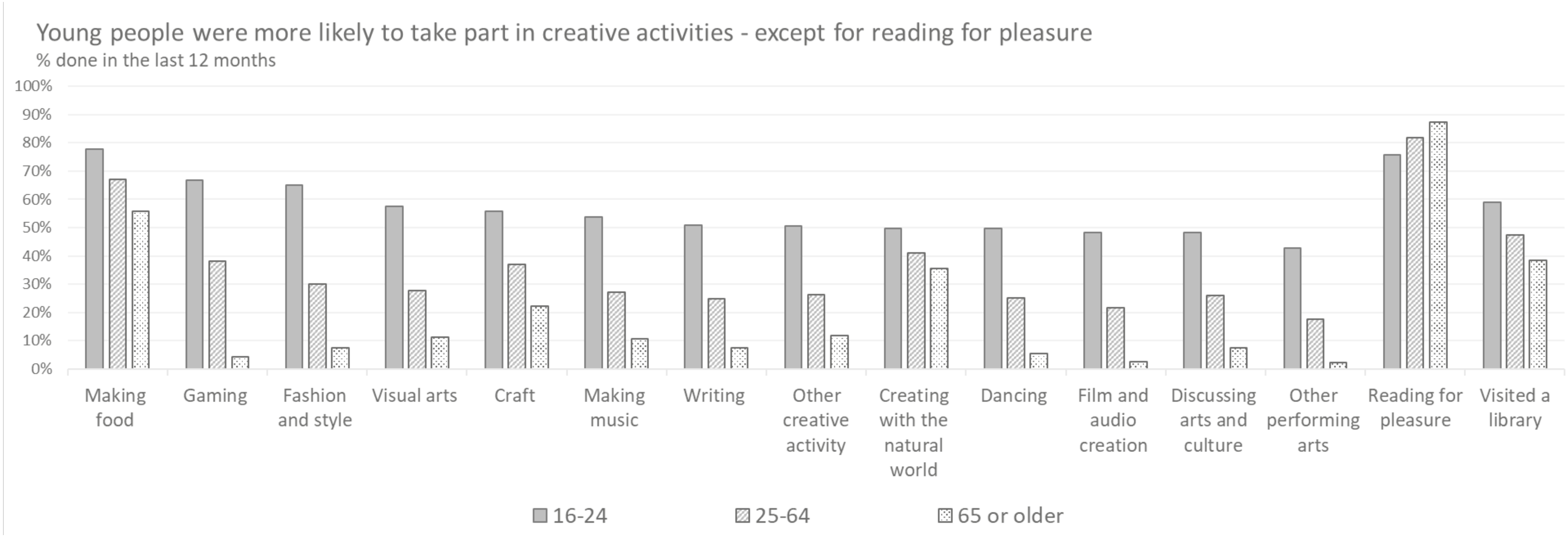
Any creative activity (excl. reading) since start of the pandemic: 45%



Wave 7

Any creative activity (excl. reading) in last 12 months: 86%

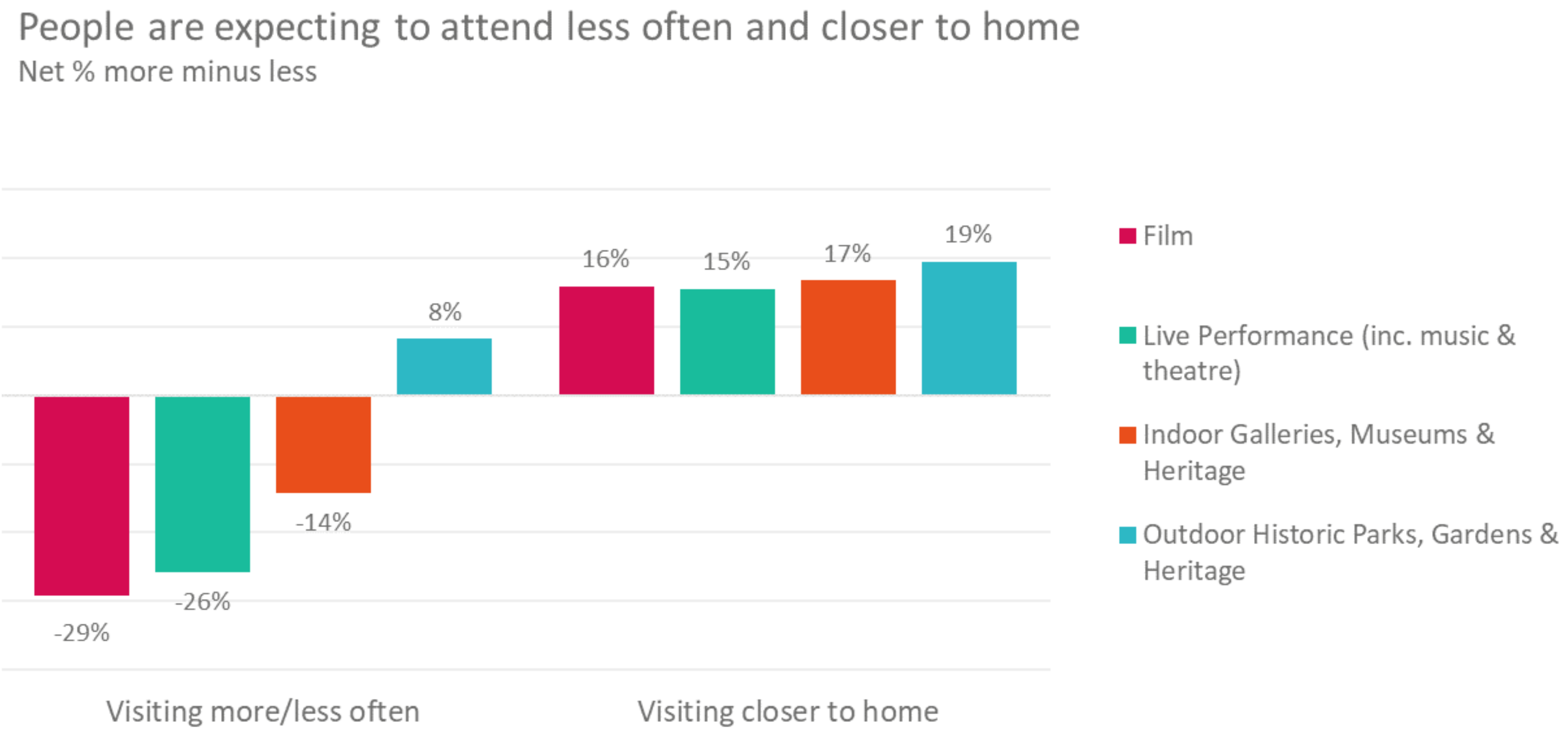
Everyday Creativity



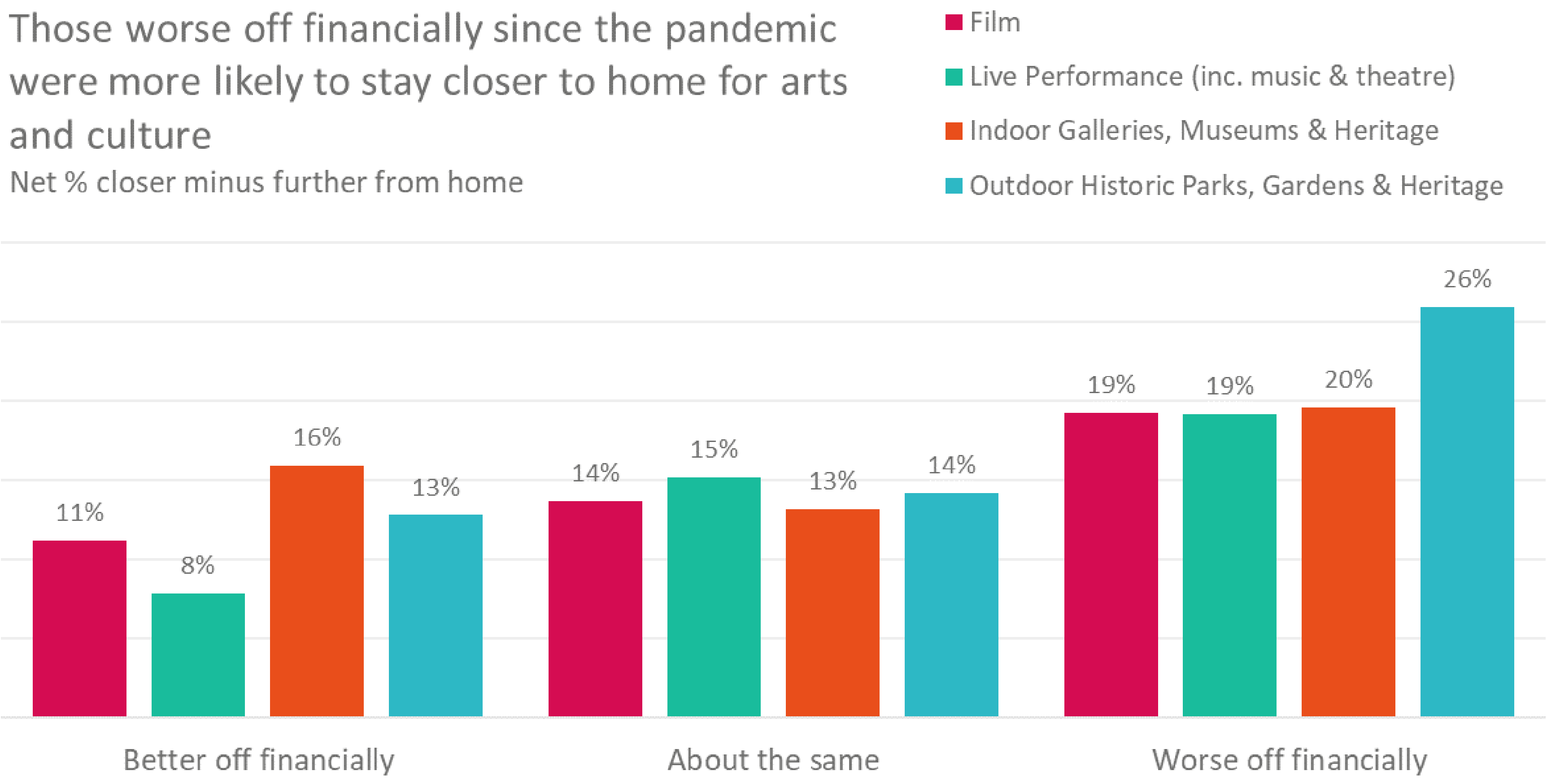
Future Attendance

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?



Future attendance

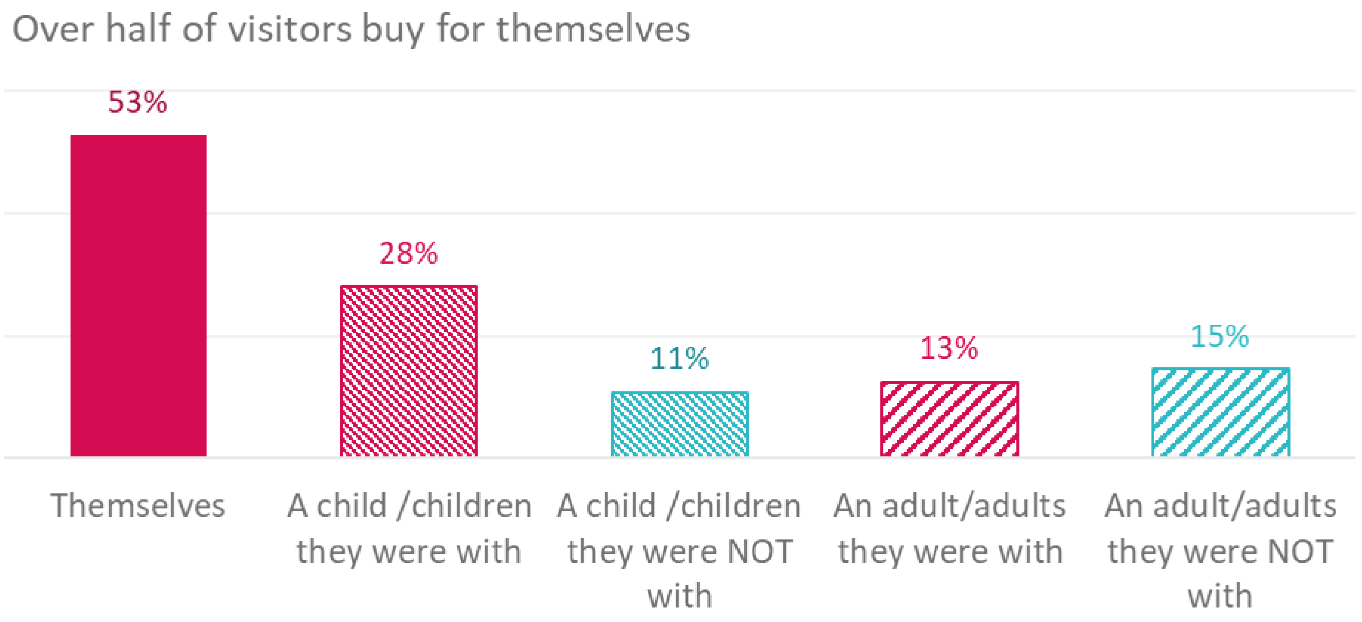


Retail Offers: Shops & Cafes

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…

Giftshop Purchases



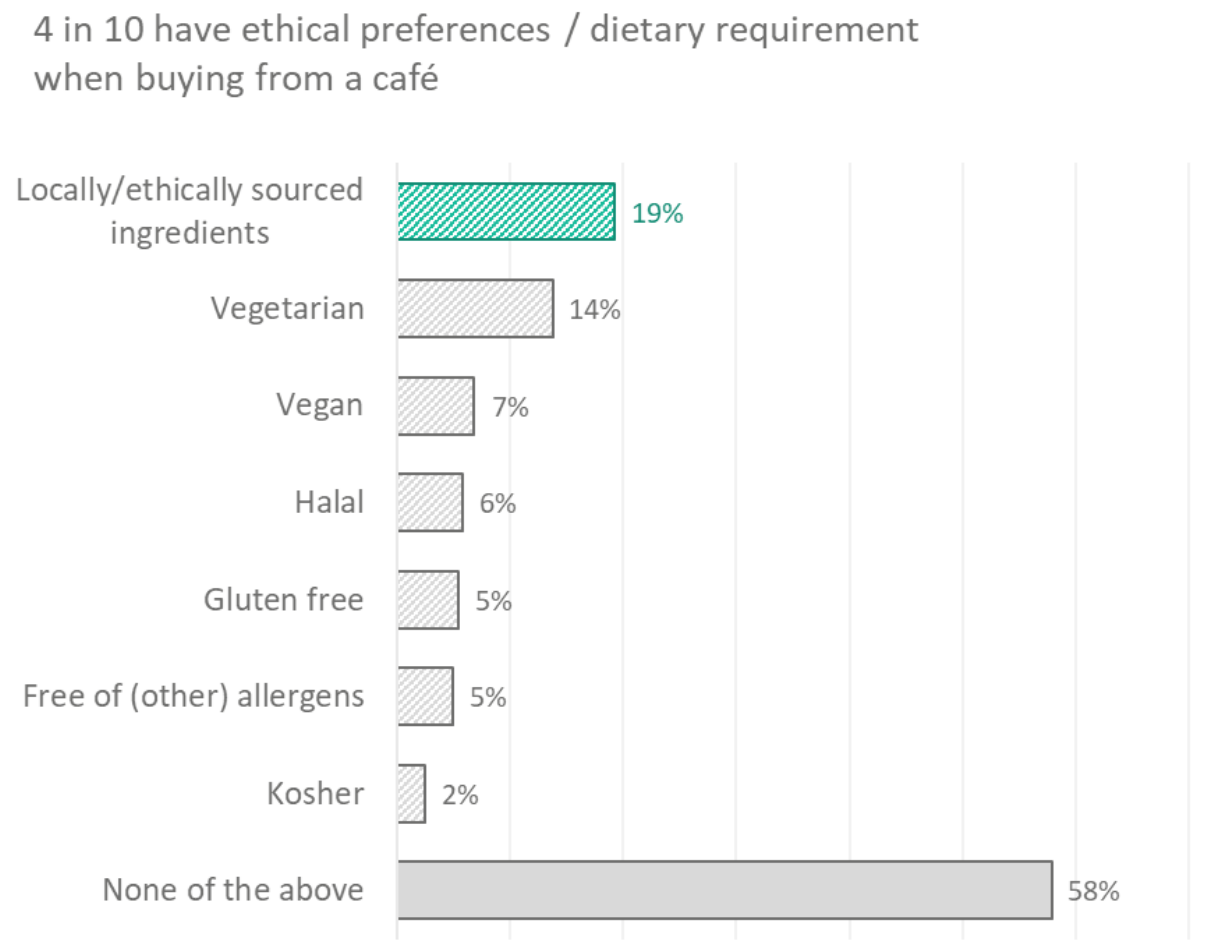
Higher younger

35-44: 48%

U65s: buy more for those *with*

O65s: buy more for those *not with*

Café Purchases



Vegetarian Options:

Asian/Asian British: 25%

Metroculturals: 20%

Female / London / 16-24s: 17%

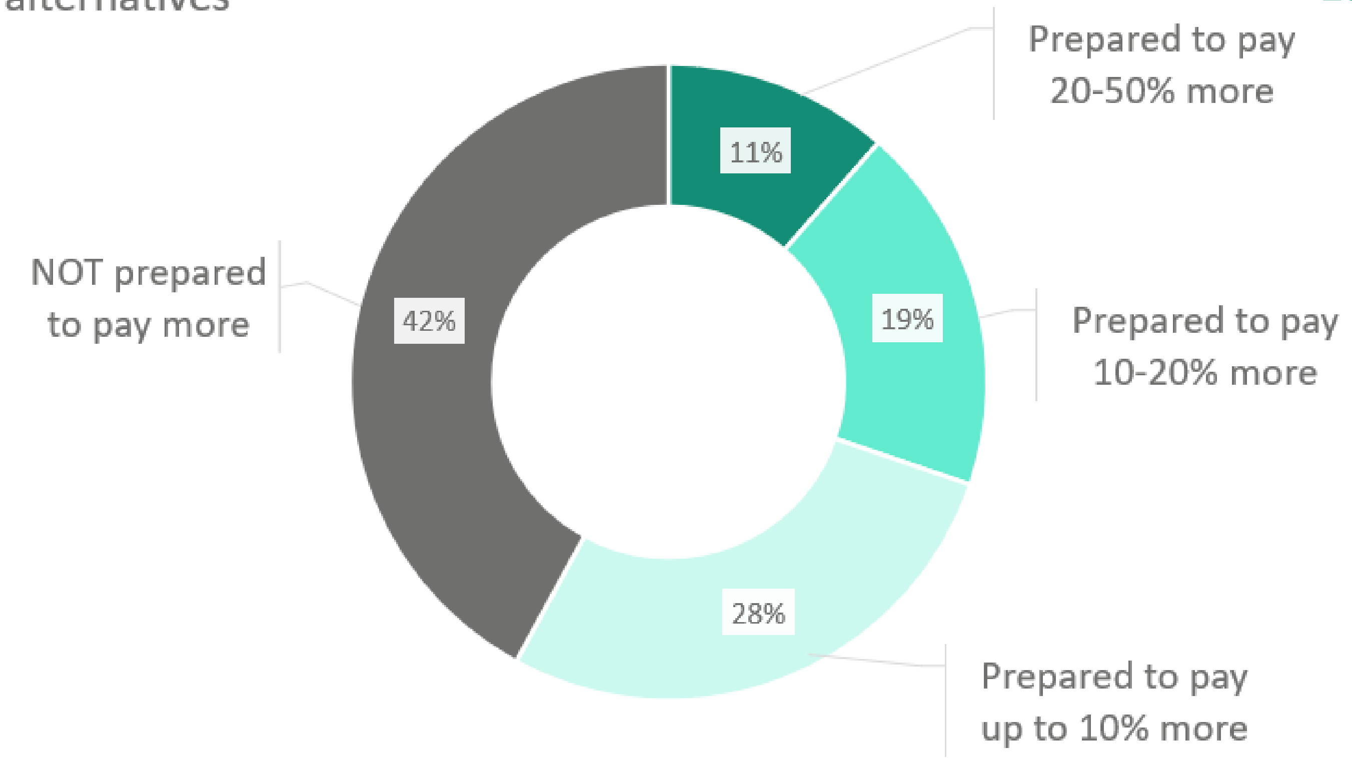
Café Purchases

16-24: 22%

Families: 19% (esp. youngest 6-10: 22%)

Lower eng’d: 15%

Over half were prepared to pay more for greener alternatives



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

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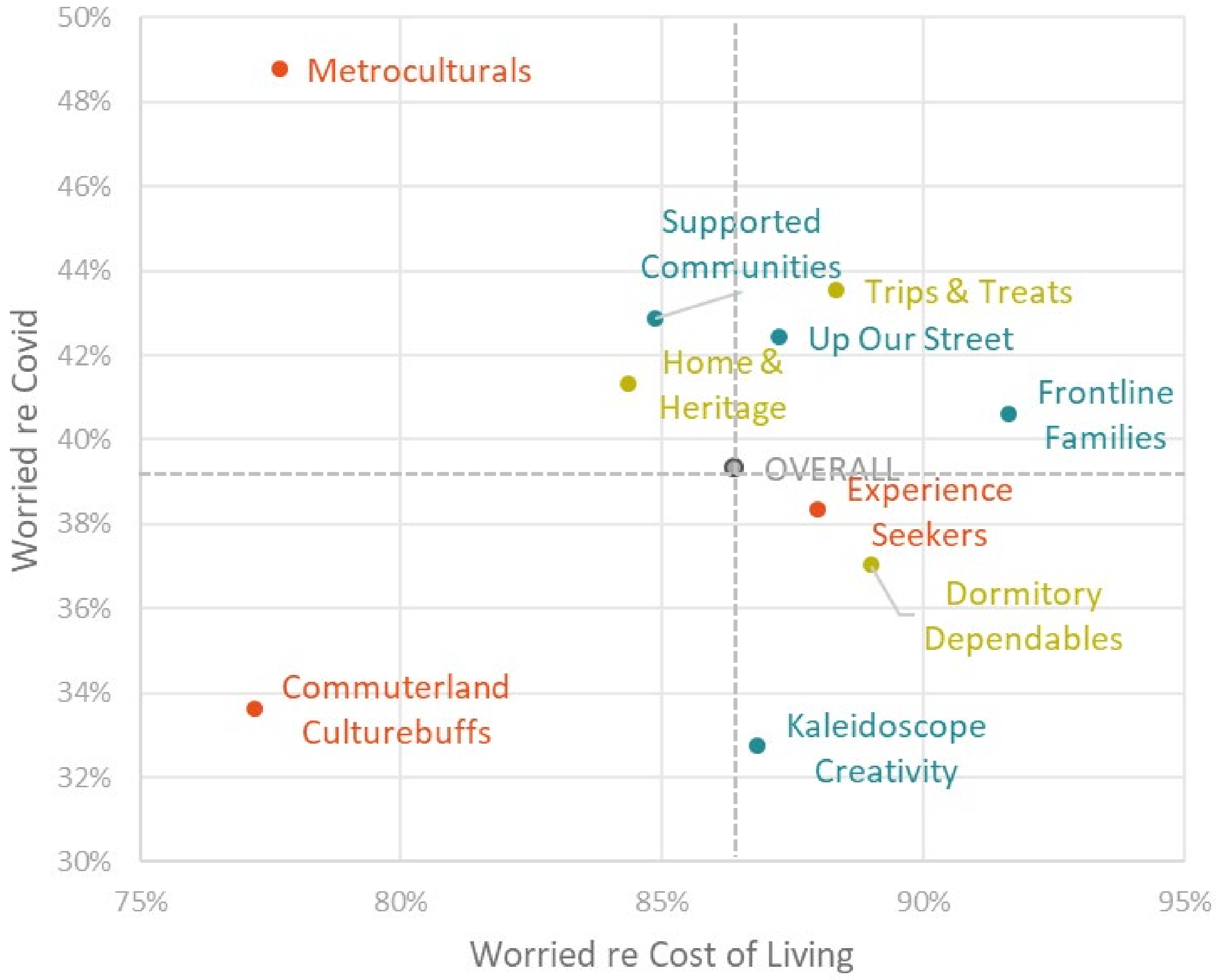

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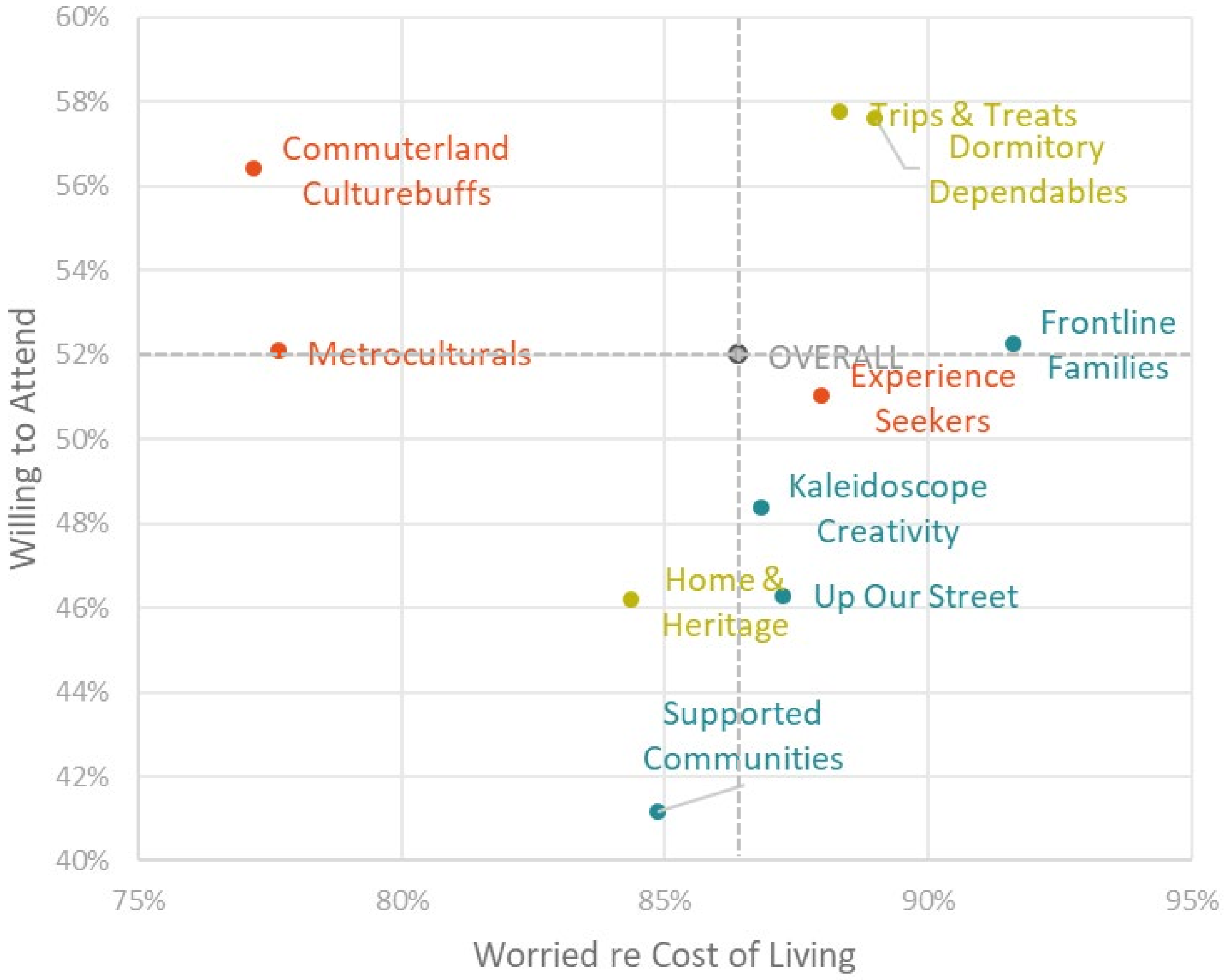

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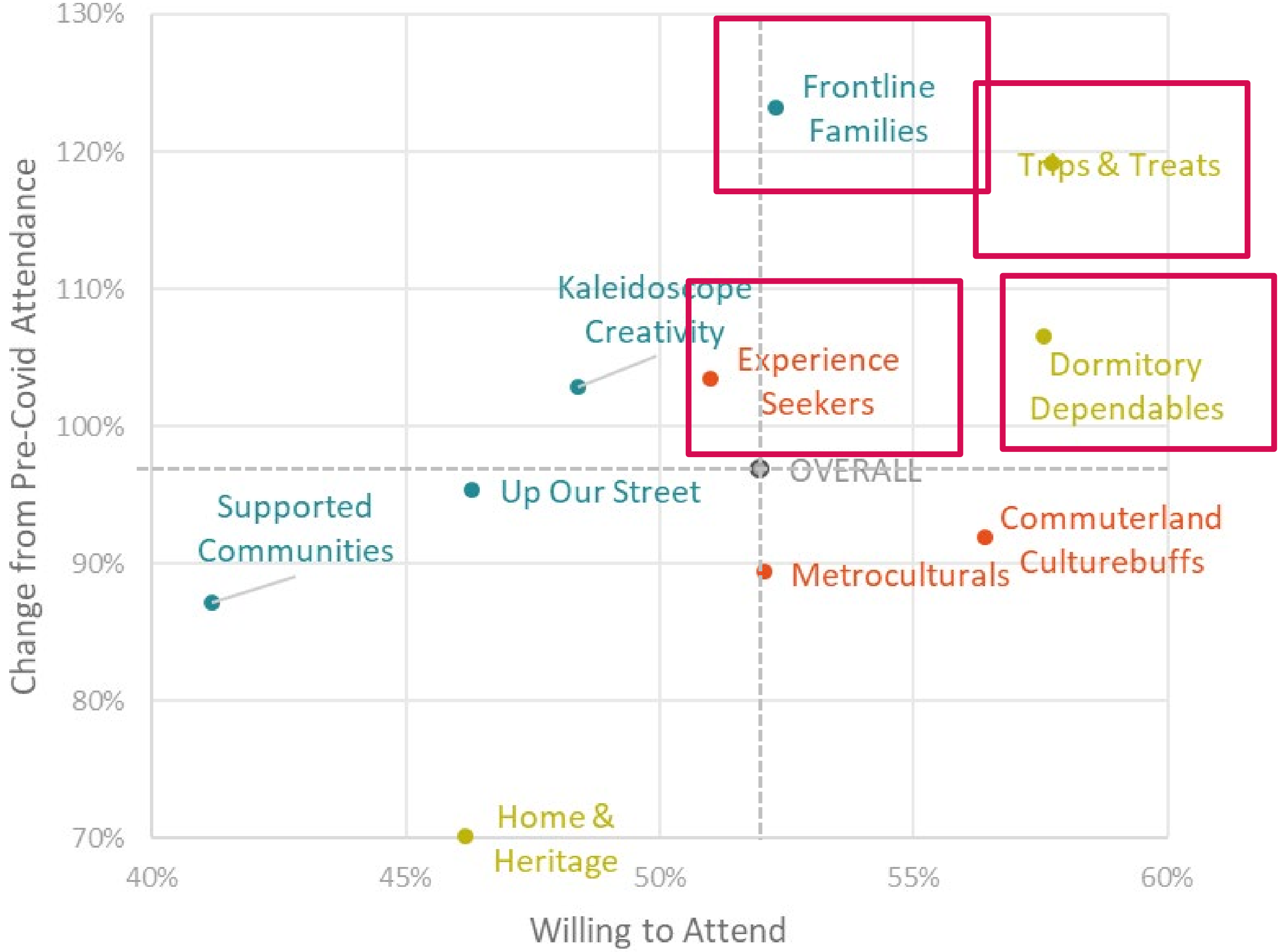

Implications

- 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

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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 recentlyy 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

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