the audience agency

COVID-19 Cultural Participation Monitor

Summary Report

Contents:

3. Foreword
4. Differing Experiences of COVID-19
7. Available Time and Money
10. Digital Engagement in Lockdown
15. Booking in Lockdown
20. Considering What's Next
24. Context and Methodology

COVID-19 has had a profound impact on the cultural sector, those who work in it, our audiences and communities. The Audience Agency, recognising our role and responsibility as a ‘sector support organisation’, has been doing what we can through this crisis to assist the arts and cultural sector. A key part of that has been providing a range of publicly-available evidence and insight to reduce the many unknowns. If previous certainties about audiences may no longer be a reliable guide, we’ve tried to cast new light on audiences as they are now: their experiences, behaviours, values and future intentions.

Among the wide range of evidence we’ve already been sharing via our COVID-19 Insights section of our Bounce Forwards support programme, the COVID-19 Cultural Participation Monitor is the most important. We’ve been fortunate to have had support from the Arts and Humanities Research Council, alongside colleagues in the Centre for Cultural Value, to allow us to conduct this national programme of ongoing research, allowing us to understand, and track changes in, the public’s cultural participation through and beyond COVID-19. This report provides an initial overview of the findings from the first wave of field work, which already provides a clear picture of the impact of COVID across the whole population: how it has affected cultural engagement so far, as well as how it is likely to affect it in the future.

We will continue to build on this beginning to provide an ever-richer understanding of our communities and their cultural engagement. Importantly, this research is focussed on the whole of the UK public and will track and explore their behaviours, attitude and intentions throughout the crisis, running in a series of waves of nationally-representative panel surveys well into 2022. It doesn’t only focus on a particular moment in time, or a specific artform, or only ‘core’ audiences, or those on mailing lists.

This COVID Monitor starts from a belief that everyone’s experiences, and everyone’s cultural engagement, matters. That we cannot understand the cultural impact of this moment without listening to the whole of our society. And that we need to recognise the different situations from which people came into this crisis and the different ways — whether in its apparent capriciousness, or in reinforcing existing disadvantages — that it has affected people as they have passed through it. Hopefully, it will also help us to ‘build back better’, responding to a far wider range of experiences and needs than before.

Differing Experiences of COVID-19

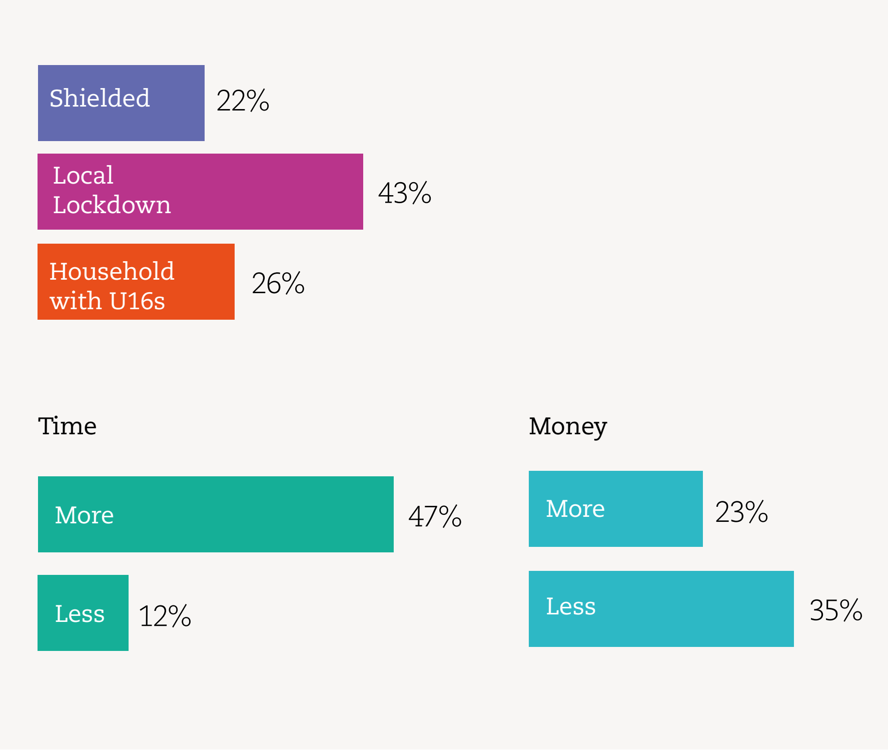
COVID has made a difference to all of us, but the exact nature of the experience has varied in many ways. This section summarises some of the key differences, how they inter-relate and which groups are most likely to experience them. To understand people's experiences, and potential future behaviour, it is important to understand the variations in what they have been through this year. Over the next couple of pages, we look at these in more detail. How do the different experiences overlap? Who are those affected by them? We do this, here and elsewhere in the report, by using Audience Spectrum, our segmentation model for the UK population, based on arts and cultural engagement. For more details, see www.theaudienceagency.org/audience-spectrum.

We look at the profiles in two ways. The first is who's included when we talk about those affected in a particular way (to answer questions like 'what percentage of those who are shielding are Dormitory Dependables?'). The other is the extent to which people in a particular group are more or less likely to have been affected in each way (for example 'are Dormitory Dependables more or less likely than average to be shielding?').

Many people — along with others in their household — have had to 'shield' during the crisis, with those at 'high risk' including those with severe respiratory conditions, on immuno-suppression therapies, having cancer treatments and organ transplant recipients. Over 70s were also considered at 'medium' risk. Guidance has varied over time, but over 1 in 5 consider themselves to have been 'shielding' at some stage.

Over 4 in 10 said that they had been subject to some kind of local lockdown (specifically, they answered 'yes' when asked 'Do you live in an area that has been subject to a local lockdown, i.e. restrictions not typical of the country in which you live?'): this varies by region, as would be expected, and was highest in Wales and the North West.

Over a quarter of households contain under 16s. Having children in the household has made a substantial difference to many people's experiences (with schools and childcare settings closed at various points). This has, however been in a variety of ways. For example, although more households with under 16s report having more free time (52% compared to 45% without), there is a larger difference in those who say they have less time (21% compared to 8%).



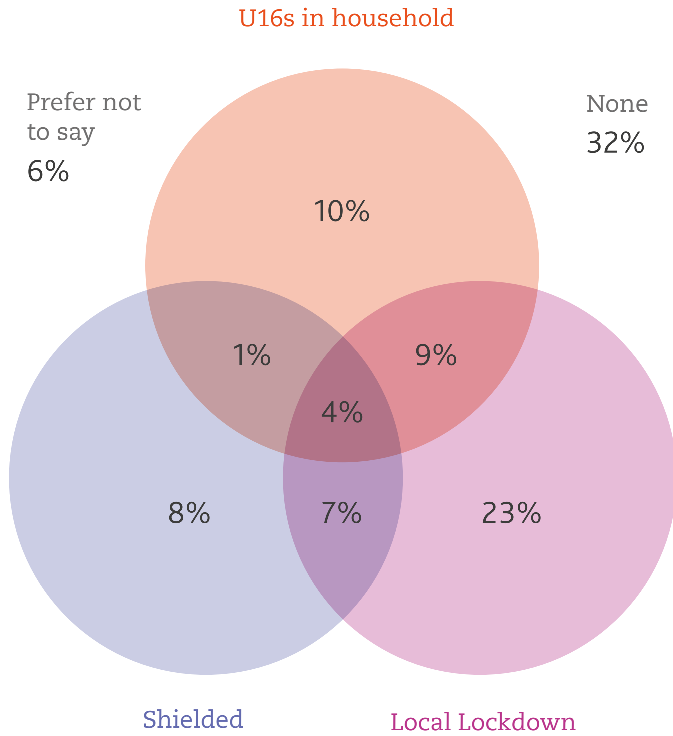
We also asked about the impact of COVID on households' spare time and disposable income (specifically, whether their income and expenditure have increased/decreased, and where both have changed in the same direction, which — if either — effect was larger). Overall, most people reported changes to their time and to their disposable income (59% and 58% respectively). Of those who'd seen a change in each category, a small majority had less money, but a large majority had more time.

Differing experiences of COVID-19 by Audience Spectrum

Use the information about the Audience Spectrum segments on the Audience Agency website to find out more about each groups tastes, preferences and behaviours, to help you tailor events to those you are trying to reach.

Most (68%) had had one of these experiences of COVID, but very few (4%) all three. Overall, there was little overlap between those who had shielded and who had under 16s in the household (5%), reflecting in part the overall age profile of those who had shielded. But it's not enough to understand the impact of these factors on their own. Most of those who had under 16s, and also most of those who had shielded, had experience at least one of the other categories, largely due to having faced local lockdowns.

Proportion of respondents who have been affected by shielding, local lockdowns or having under-16s in the household



Differing experiences of COVID-19

The charts on the right show the extent to which people in different groups are more or less likely to have been affected by shielding, local lockdown and having under 16s in the household. Those on the right show the proportion of each group is likely to have more or less time, and more or less money. For all charts, the difference shown is the difference in percentage points from the overall (e.g. 22% overall have shielded; the '-4%' for Metroculturals means 18% of them have shielded).

Shielded

The two segments which are oldest on average are those most likely to have shielded: Home & Heritage and Heydays. The other three 'lower-engaged' segments are also more likely to have shielded.

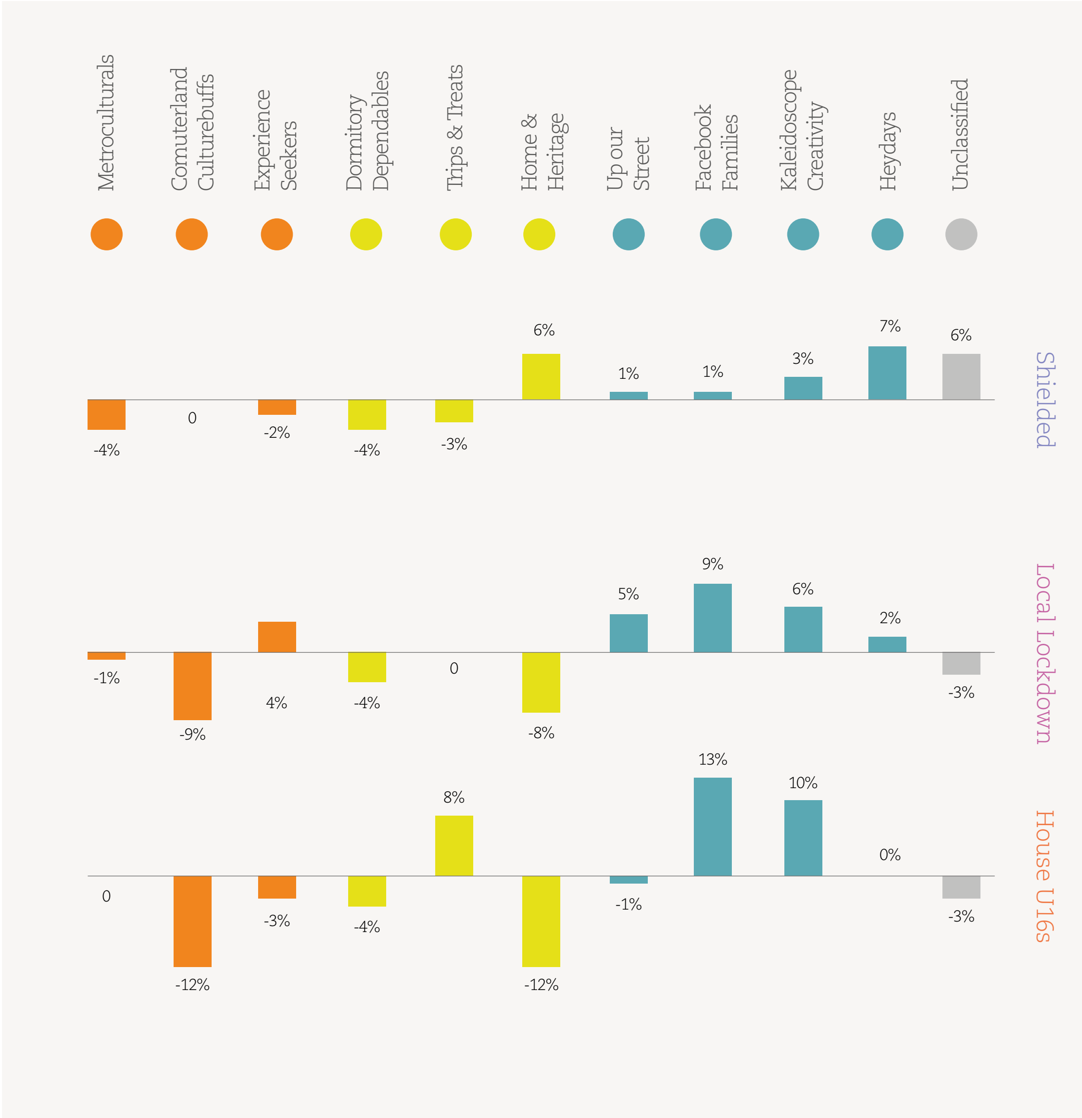
Local Lockdown

Lower engaged groups and Experience Seekers are more likely to have experienced local lockdown, particularly Facebook Families, showing a concentration among urban and younger groups. Commuterland Culturebuffs and Home & Heritage are consequently less likely to have.

U16s

Facebook Families, Kaleidoscope Creativity and Trips & Treats were particularly likely to have under 16s in their household (and Commuterland Culturebuffs and Home & Heritage particularly unlikely).

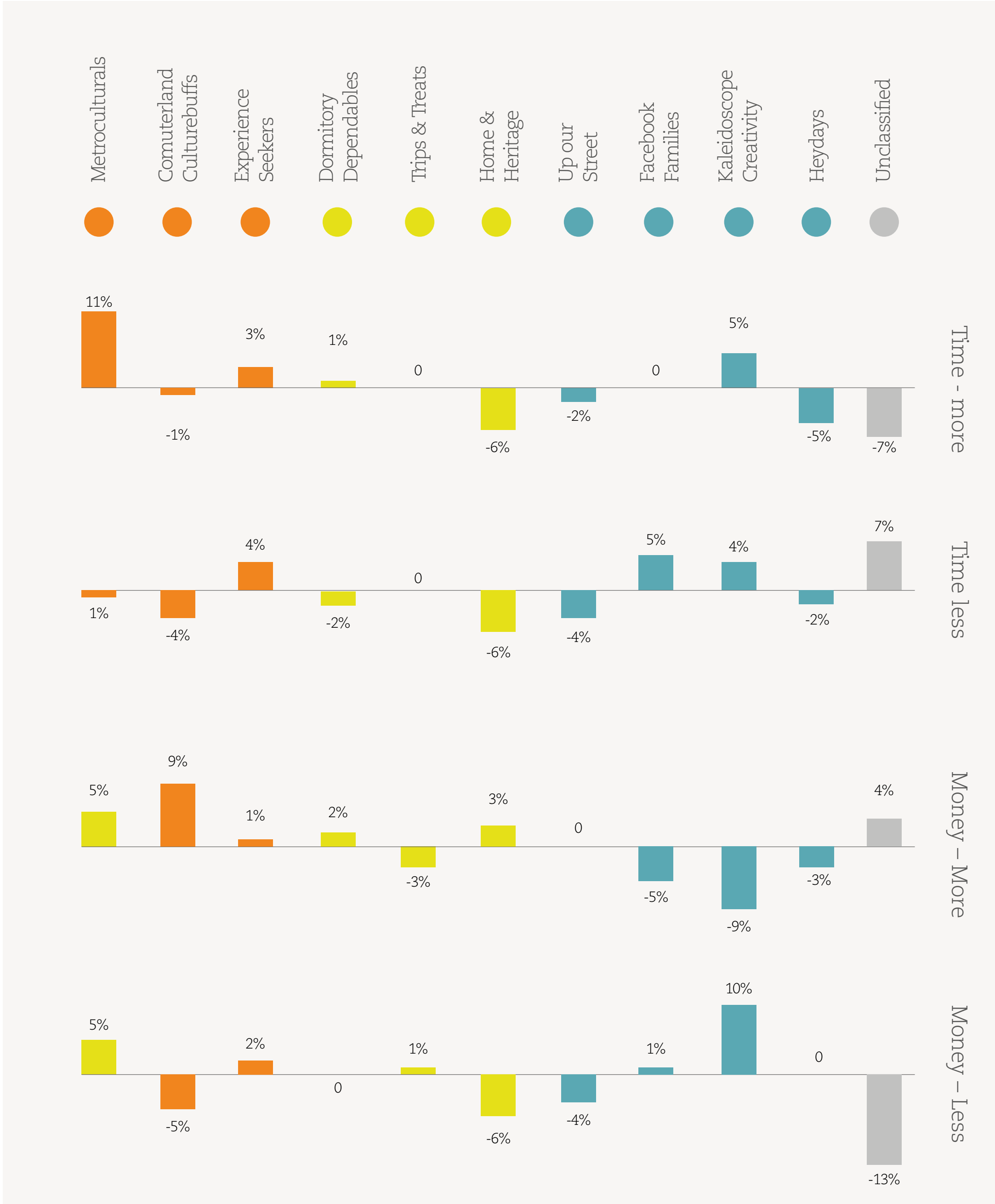
Overall, Kaleidoscope Creativity and Facebook Families were above average for all three questions and Dormitory Dependables below for all three.



Available Time and Money

The amount of time people had was higher for all groups overall, but particularly Metroculturals. Facebook Families' time was relatively more likely to be pressured. Groups that are above average for both more and less time have particularly varied experiences (Experience Seekers and Kaleidoscope Creativity). Home & Heritage were particularly likely to have the same amount of time as usual (along with Heydays and Up Our Street).

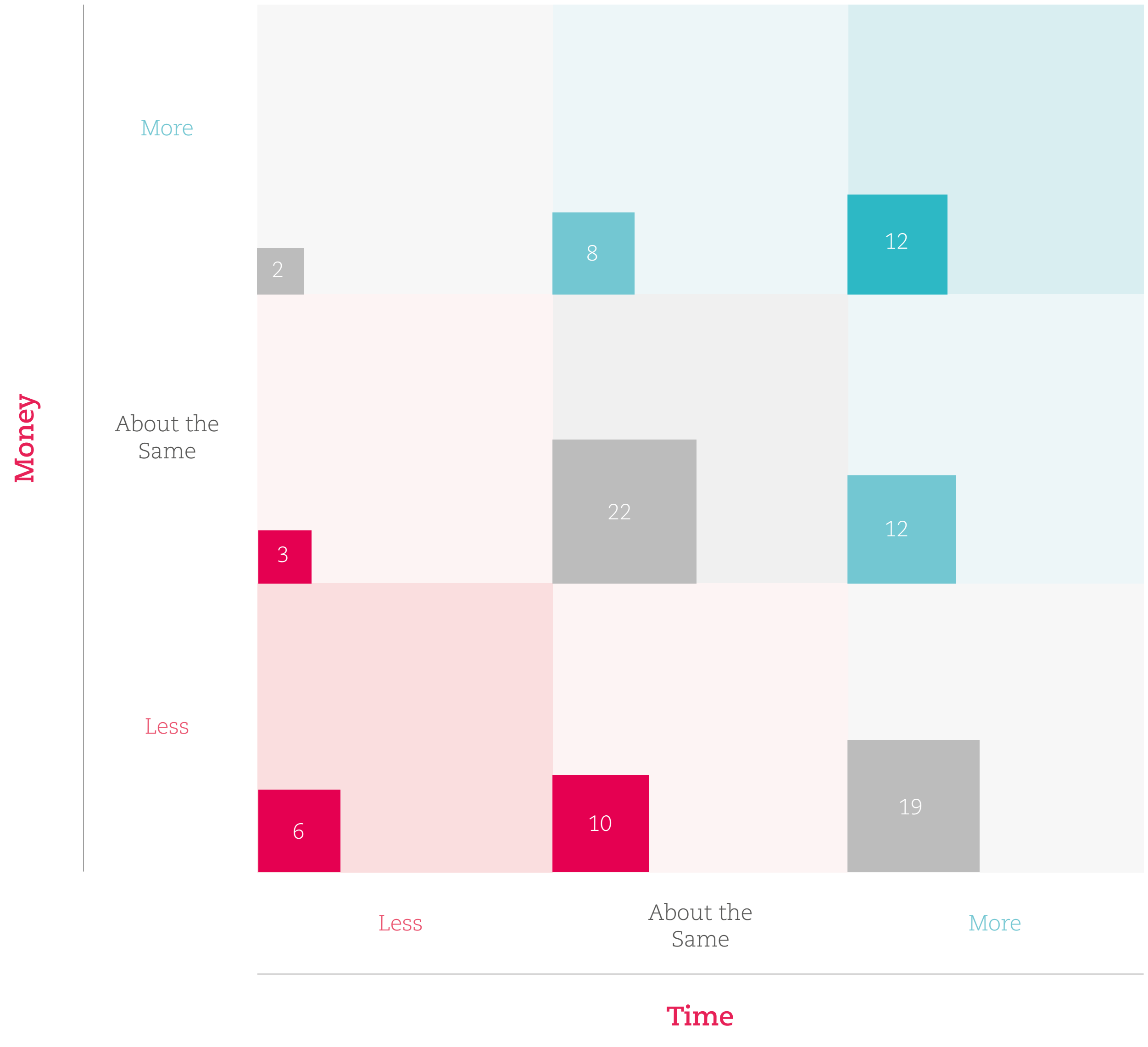
Kaleidoscope Creativity are particularly likely to have seen falls in income (and not to see rises) — Commuterland Culturebuffs and Home & Heritage, on the other hand, were more likely to have had rises in income (and not have seen falls). Metroculturals were more likely to have seen rises and falls (although they typically have above average income).



Available Time and Money

The table on the right shows the proportions of respondents who gave each combination of responses above having more, the same or less time and money. COVID's meant changes in at least one or the other for almost 80% of the population and changes in *both* for almost 40%. Whilst having the same of both is the single highest response, with over one in five, a similar proportion have had less money and more time (whether from furlough, unemployment, reductions in hours or other reasons).

But for most others, there *isn't* a trade-off between more time and money. Most of the 22% who have more money also have more time (12%). A further 20% have seen one or other increase, with no countering decrease. Most of the 11% who have less time have less money as well (6%).



Available Time and Money

This chart shows how the different Audience Spectrum groups are distributed between the nine categories of whether people have more or less time and money.

Of the largest group, where neither has changed, the most over-represented groups are Home & Heritage, Heydays, and Up Our Street: all three of which include above-average proportions of retirees (who are therefore unaffected by employment changes such as furlough and redundancy and are less likely to have children at home). All of the groups which are highest-engaged in arts and culture are over-represented among the 12% who have more of both time and money. Younger and more urban groups were more likely to find themselves with more time and less money, particularly Metroculturals and Kaleidoscope Creativity. Similarly, however, Facebook Families and Kaleidoscope Creativity were more likely to have less of both, along with Metroculturals and Experience Seekers.

Many of the differences are being felt among groups at the extremities of the range of cultural engagement. As a result, the middle-engaged groups Dormitory Dependables and Trips & Treats were consistently close to average, the big differences being mostly felt among the higher- and lower-engaged groups. The comparison between Metroculturals and Home & Heritage is also instructive. The former is higher (and higher than average) for three out of four of the most extreme cases (less of both, more of both, more time and less money — the latter by 26% to 15%). However, it is much lower where the time is the same (15% compared to 29% for the same time and money). The segments which face this greater variability are likely to experience both more opportunity and more jeopardy. Some other groups may feel at once more insulated against, but also restricted by, the pandemic (considering who had needed to shield, for example).

Digital Engagement in Lockdown

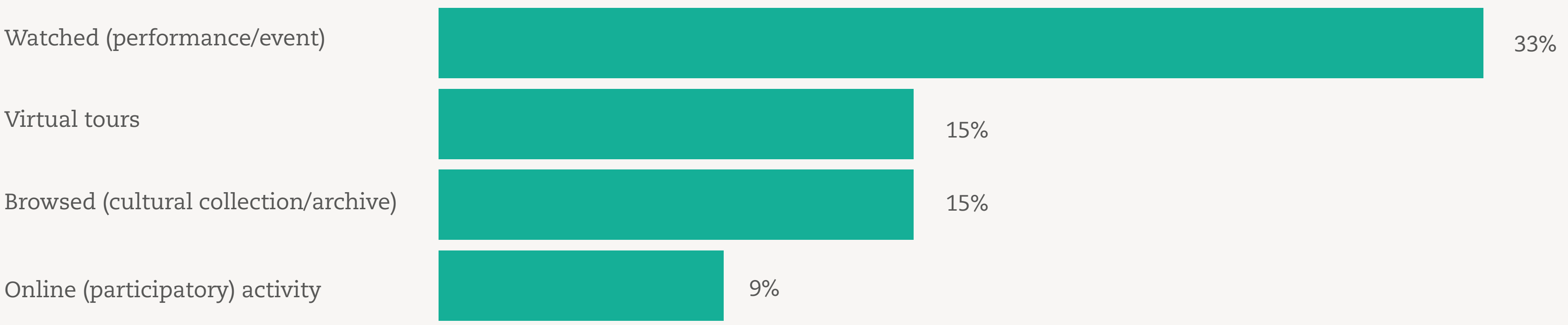
Although this, like other, research shows the importance of digital engagement in arts and culture to core audiences during the pandemic, it's important to note that only 33% have watched an online performance or event. It is less for other categories of online activity, e.g. only 9% had participated in a cultural activity online, such as a workshop. This is still a substantial audience overall (33% of around 53M adults is approximately 17.5M people; 9% nearly 5M), but highlights that it is a minority activity.

Of those who had watched online arts/cultural content, the most popular was a play/drama/musical performance (17%), followed by an online music gig (15%). 7% had watched opera/ballet/a classical music concert and 5% an event connected with books or writing. 'Other live entertainment' was watched online by 10%, 'other streamed performances' by 11%.

There is considerable variation within these figures, by profile: 27% of Metroculturals have watched a play/drama/musical performance, but fewer than half that proportion of Up Our Street and Facebook Families (13%). 19% of Metroculturals, Experience Seekers and Kaleidoscope Creativity had watched an online music gig and these were the highest groups for contemporary dance (9%, 7% and 7% respectively) and events connected with books and writing as well (10%, 7% and 10%). Commuterland Culturebuffs were third highest for opera/ballet/a classical music concert, however, with 9% having watched. This was only just behind Experience Seekers (10%), although a long way behind the highly culturally and digitally engaged Metroculturals (18%).

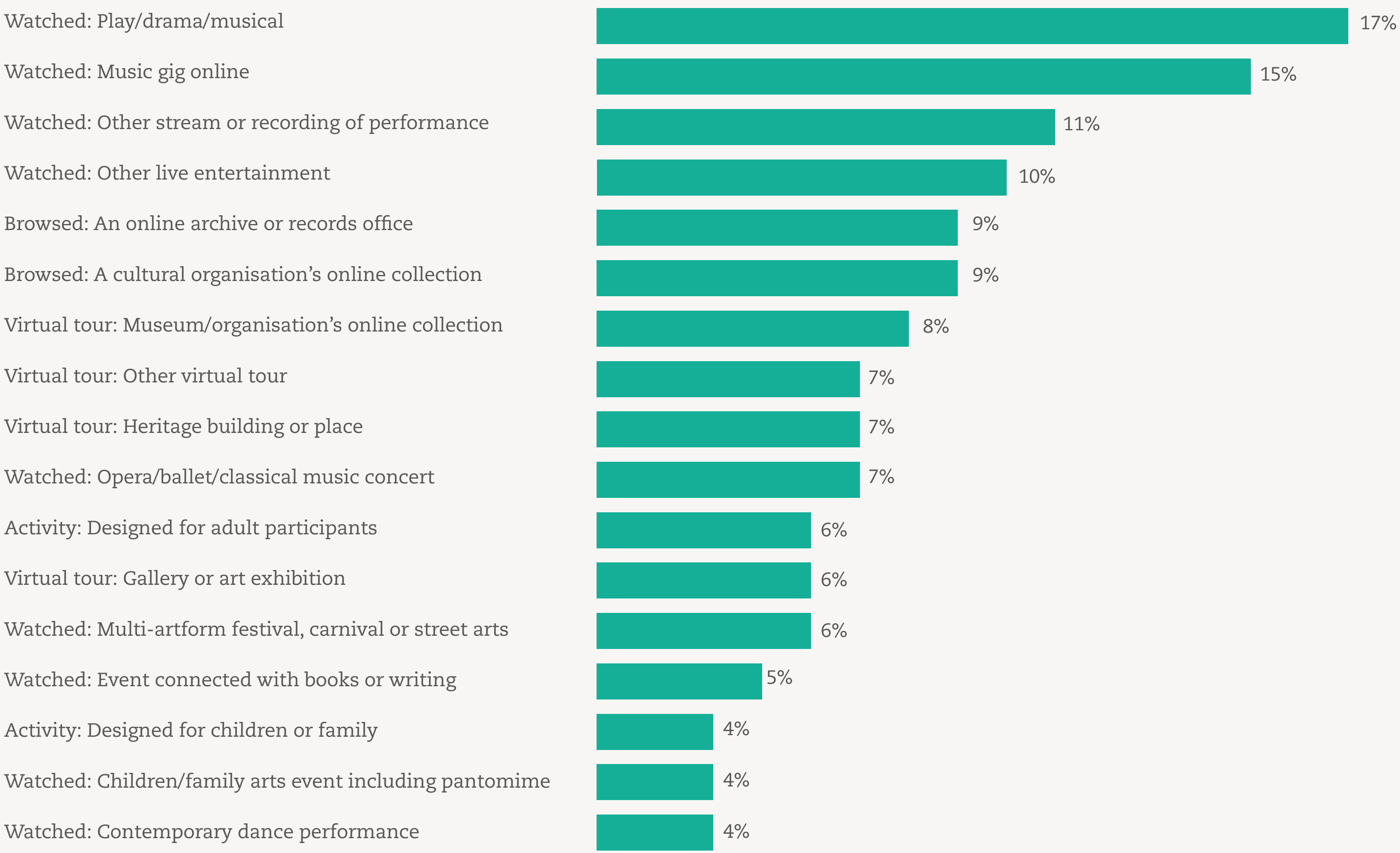
Despite the apparent freedom of digital engagement from geographical restrictions, engagement still varies greatly by region, with almost half the proportion in the East Midlands (13%) watching plays/drama/musicals online compared to London (25%). Although age also plays a market role in many cases, the extent varies strongly by artform. For plays/drama/musicals 19% of 16-24s had watched, compared to a similar 17% of over 75s'; for music gigs it was of course rather different, with 20% compared to a mere 5%.

% Did the following (online) since March 2020



Digital Engagement in Lockdown

Most Popular Online Arts & Cultural Activities



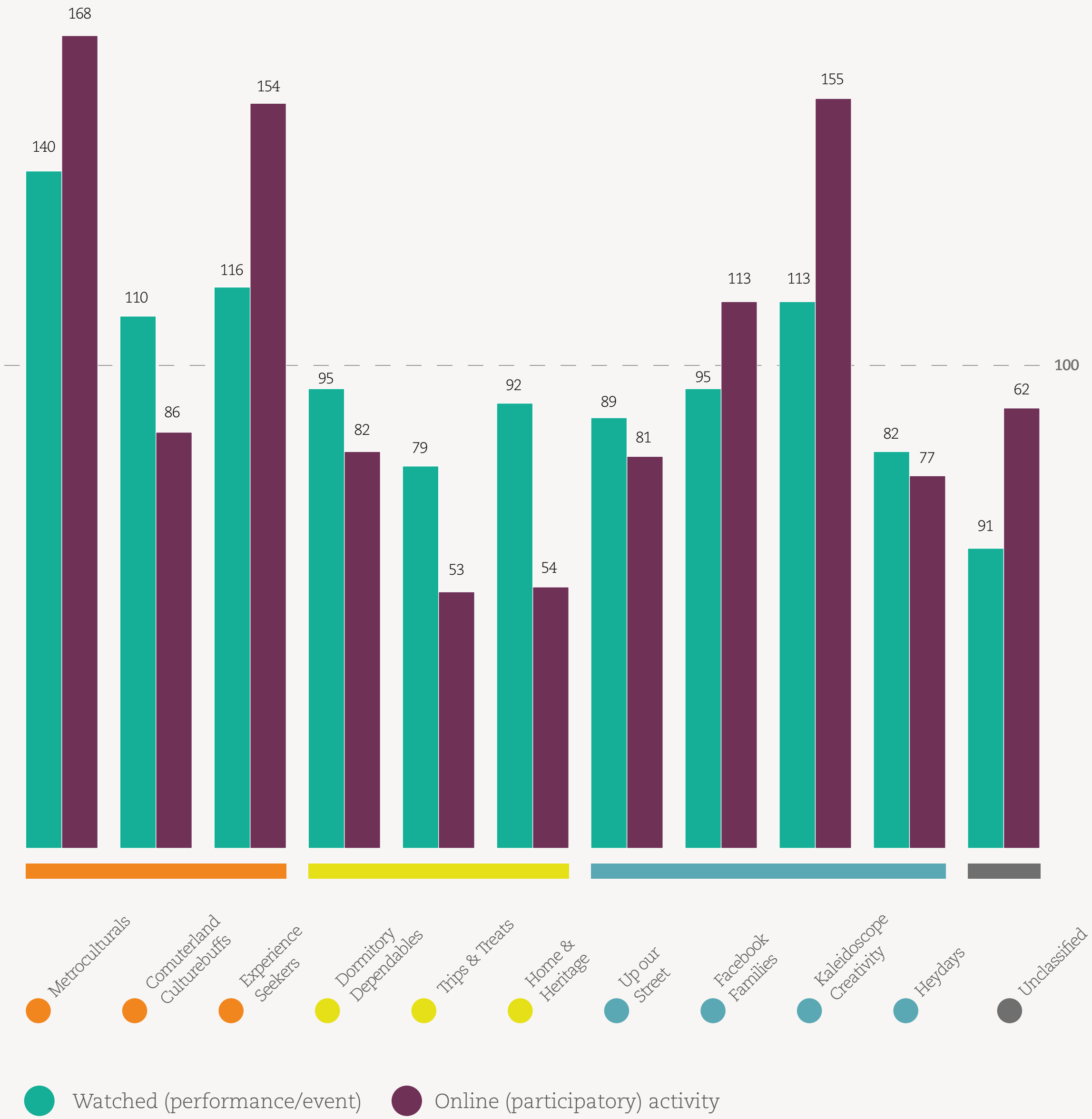
Digital Engagement in Lockdown

This chart focuses on the overall proportions by segment which had watched performances and events, and who had participated in activities, online. It shows a complex picture.

By and large, the higher-engaged segments did more of both types of engagement, with Metroculturals and Experience Seekers particularly highly engaged in participatory activities. Kaleidoscope Creativity, despite being less engaged in in-person engagement overall, engaged digitally in similar ways to these two higher engaged groups, suggesting longer term ways of engaging this group.

This wasn't the case for the third highly-engaged group, Commuterland Culturebuffs, whose high levels of engagement for watching performances in person did translate in to watching performances online, but didn't transfer into above-average engagement with participatory activities.

With one exception, all other groups were less likely to engage with watching, or especially participating online. This exception is Facebook Families, who had an above-average engagement with online activities, especially for activities designed for children/families (7% compared to 4% overall). This highlights that online activities could be an effectively way to reach this group, especially if low or no cost. Trips & Treats and Home & Heritage were particularly unlikely to participate in activities online: the latter is especially significant, given their lower likelihood to return to in person engagement in the near future (see page 20).



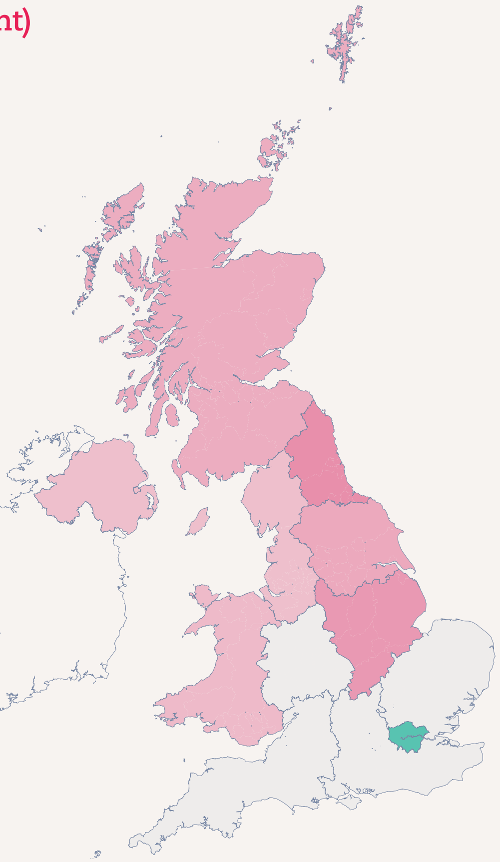
Digital Engagement in Lockdown

These maps show the engagement levels for each region and nation, compared to the average (=100). London stands out for high levels of online engagement, particularly for participation in online activities, which was the type of engagement for which levels in Wales, the South West, Northern Ireland and Scotland all had notably below average engagement. This didn't seem to increase as an alternative to in-person engagement for regions and nations facing local lockdowns. The only other region with levels notably above average was the North West, for participatory activity.

There is a clear gradient in online engagement by age, descending for older groups. This is steady for watching performances, with under 34s above average (for under 25s, 40% above), and those 35 and over being below average. It is much steeper for participation in activities, however, with under 34s almost twice as likely to engage and all ages 45 and over being below average, with those 65 and above only a third as likely to average to take part. We know from elsewhere, however (including our analysis of digital data from Indigo's Act Two survey) that this is unlikely to be about lack of skills or equipment at the lower end of this 65+ age-group (the levels of those watching – 80% of average – also back this up).

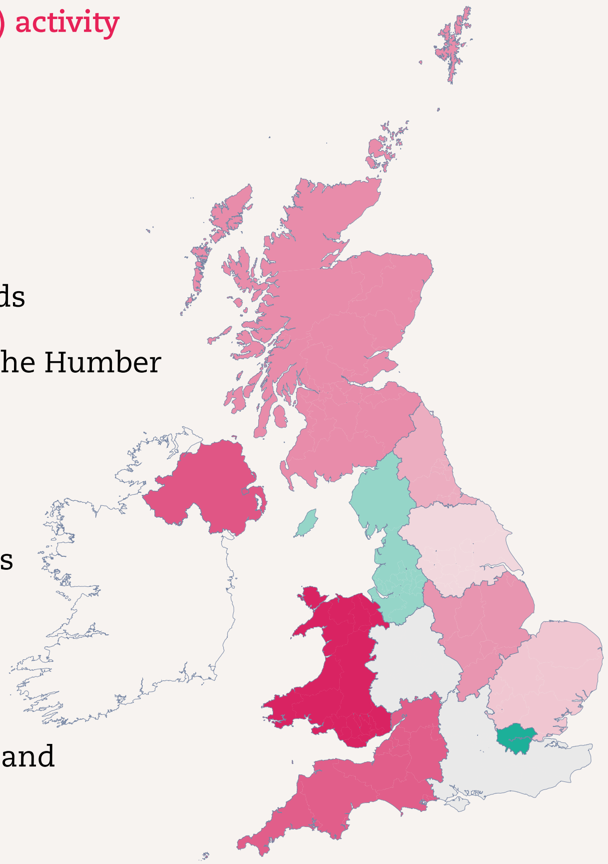
Watched (performance/event)

133	London
104	South East
104	West Midlands
101	East
99	South West
92	North West
92	Northern Ireland
91	Wales
89	Scotland
88	Yorkshire & the Humber
85	East Midlands
83	North East



Online (participatory) activity

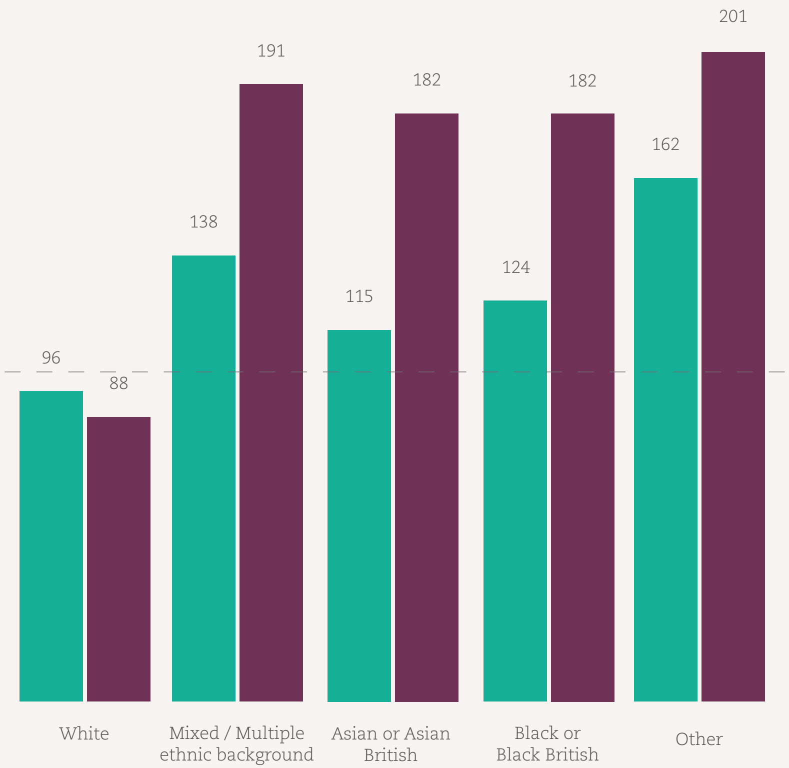
168	London
117	North West
101	South East
100	West Midlands
96	Yorkshire & the Humber
93	East
89	North East
84	East Midlands
72	Scotland
71	South West
67	Northern Ireland
47	Wales



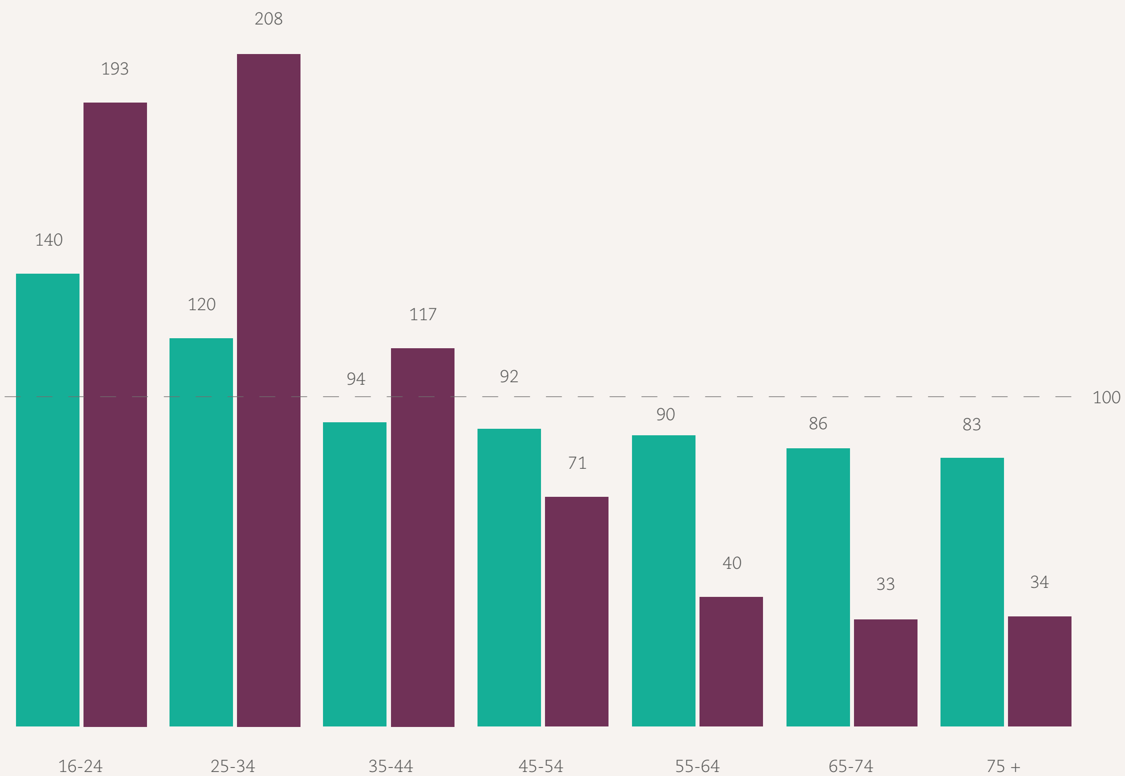
Digital Engagement in Lockdown

Another notable difference is the greater level of digital engagement, particularly for participatory activities, among respondents from Black, Asian and Mixed ethnic backgrounds, who were around 80 to 90% more likely to engage in these activities than those from white backgrounds.

Ethnicity - Index cf. Overall



Age - Index cf. Overall

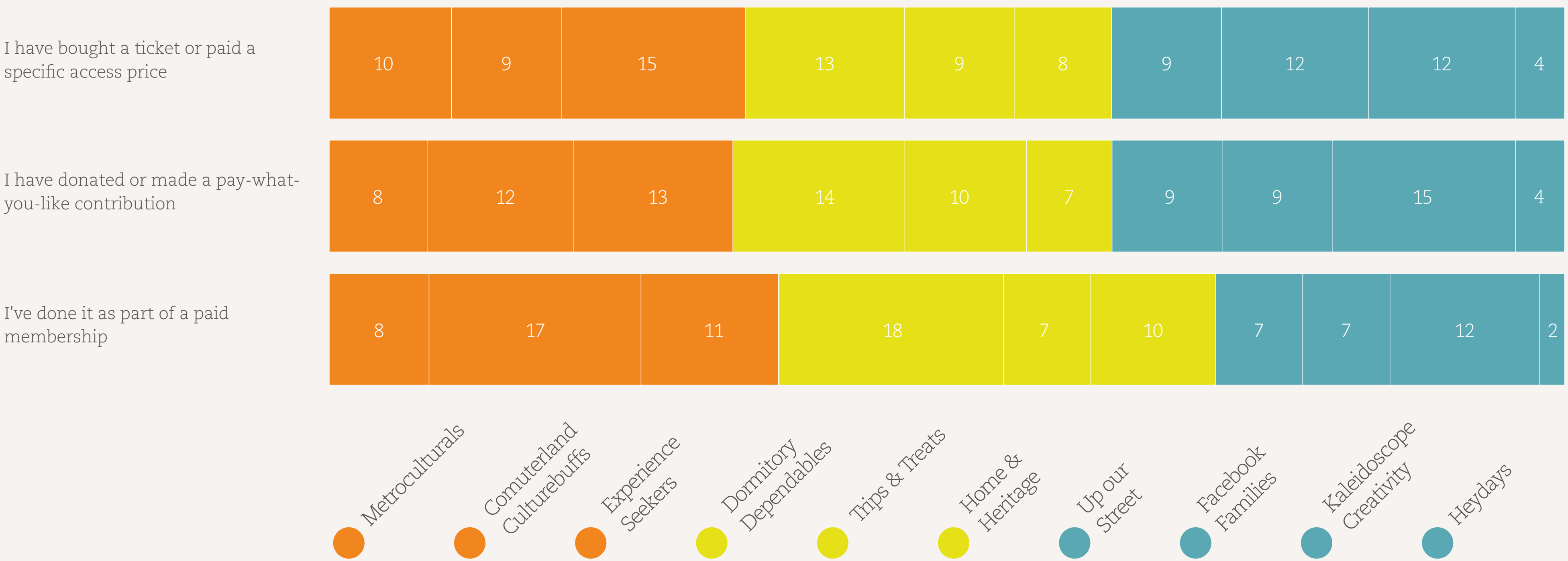


Watched (performance/event) Online (participatory) activity

Booking in Lockdown

Of those who accessed digital content, 17% paid a set fee/ticket price, 19% made a donation or pay-what-you-like contribution and 11% said it was part of a paid membership. Different types of people were more likely to make different types of payment. Metroculturals, Experience Seekers and Kaleidoscope Creativity were above-average for all three (with the latter particularly likely to make donations/pay-what-you-like contributions). Commuterland Culturebuffs and Dormitory Dependables were particularly likely to have paid memberships, but were below-average for likelihood to have paid through the other methods.

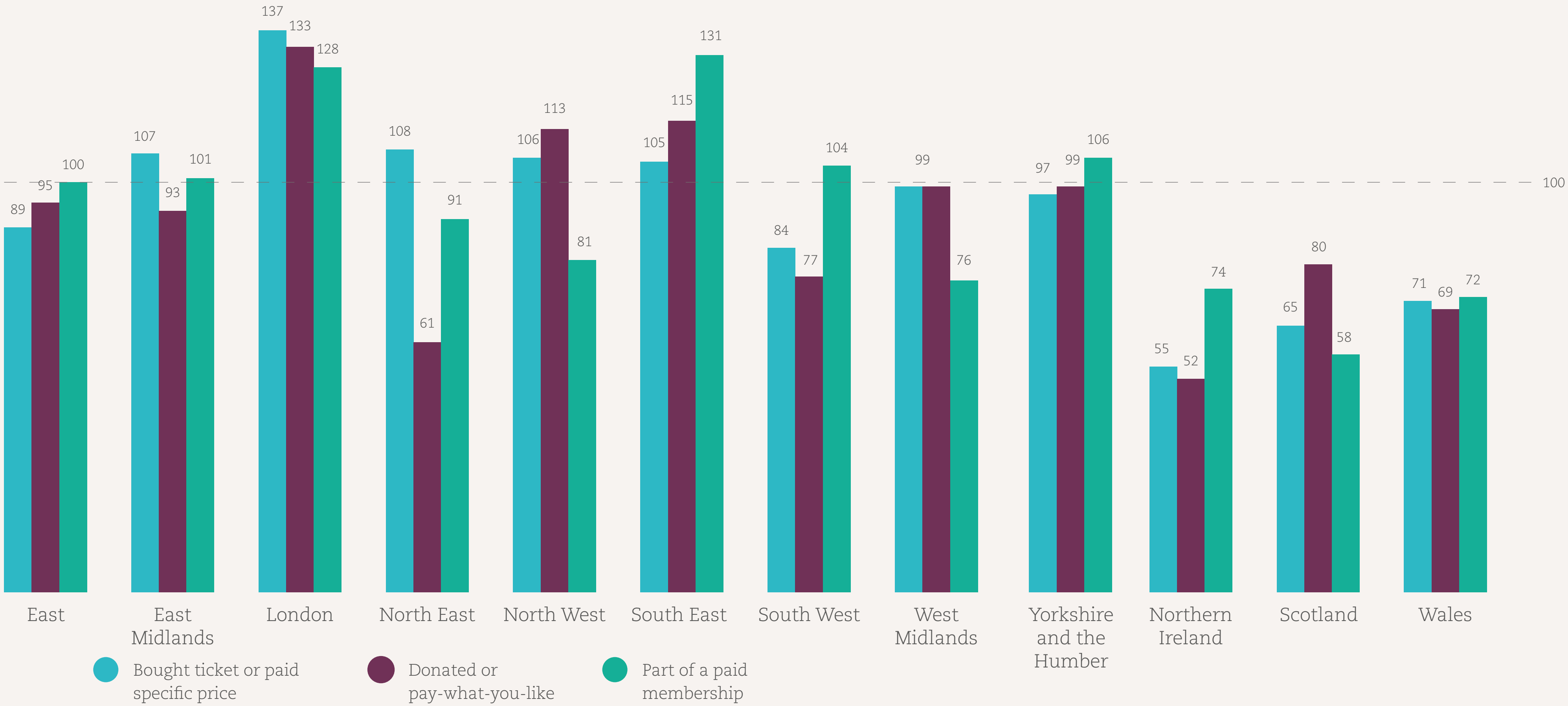
Memberships otherwise tended to reduce for lower-engaged groups (with the exception of Kaleidoscope Creativity, as mentioned). As a result, these three last-mentioned groups accounted for around 47% of all those paying via memberships. As many as 15% of those paying a fixed fee were Experience Seekers, despite their lower likelihood to by in-person tickets than other highly-engaged groups, with a further 10% from Metroculturals (despite being only 4% of UK households).



Booking in Lockdown

This map shows how different regions compare to the overall average for each payment method (based on the location of respondent, not the event/organisation they made payments for). London and the South East are higher than average on all payment methods, as is the North West, other than having lower levels of memberships.

The North East, Northern Ireland and Wales have particularly low levels of pay-what-you-like payments and donations; Northern Ireland, Scotland and Wales particularly low levels of tickets bought for online events.



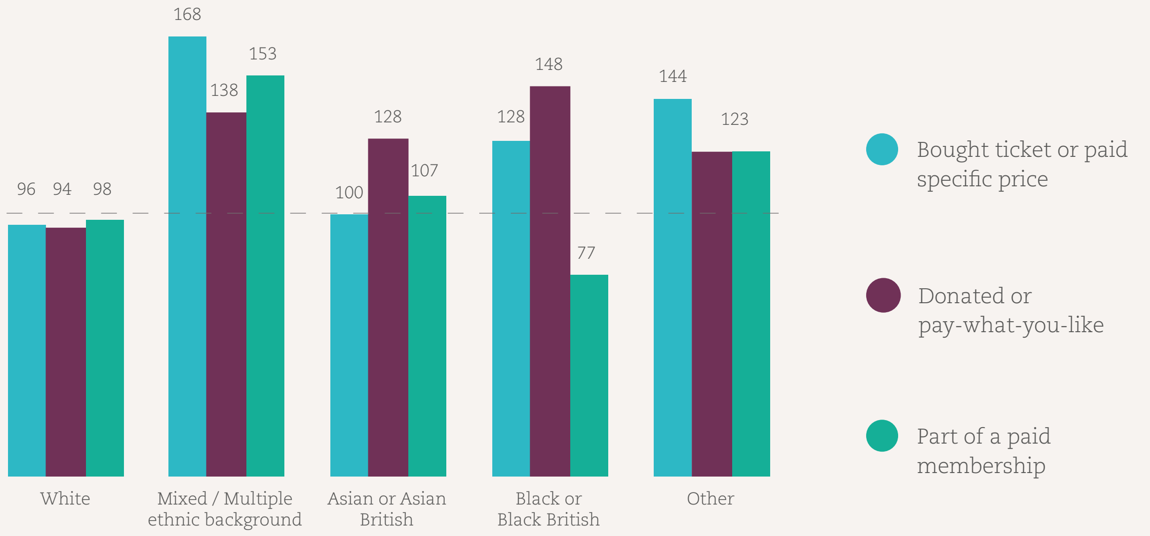
Booking in Lockdown

Payment method varies particularly notably by age: with younger groups more likely to pay or tickets and make donations (peaking at 73% and 60% more likely than average for 25-34 year olds), but the oldest two groups far more likely to have memberships (those 75+ being 45% more likely than average, despite members levels reducing in each age group from 25-34 to 55-64).

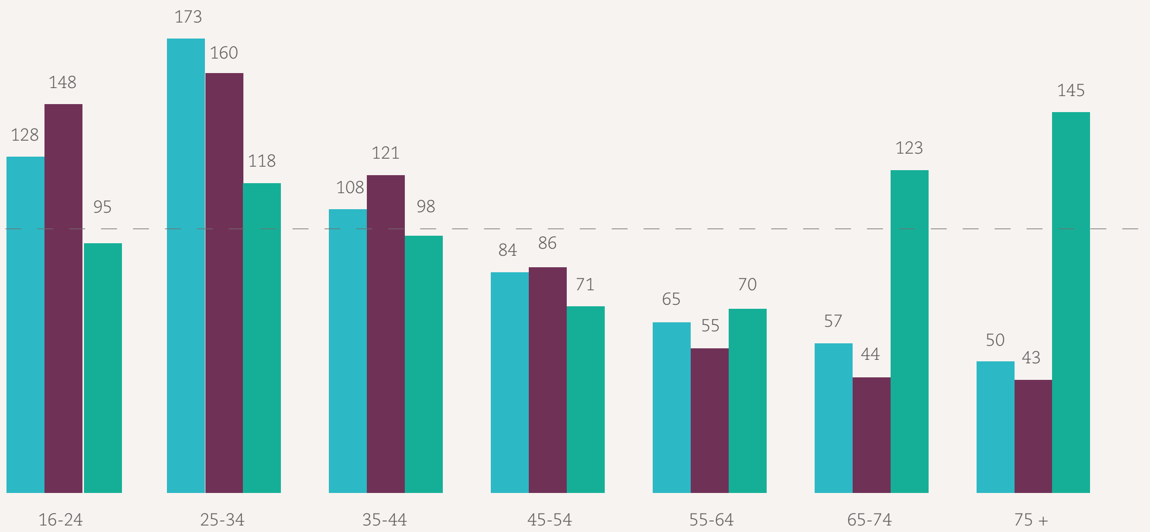
Payment method for digital activities varied by ethnicity as well. Those from Mixed as well as Other backgrounds were above average for all types, but particularly tickets and (for Mixed backgrounds) memberships; those from Asian backgrounds were particularly more likely to donate and those from Black backgrounds were more likely to buy tickets or donate, but less likely to have paidv through memberships. Those from white backgrounds were slightly below average on all counts.

Further research and/or analysis may show whether this is linked to particular artforms, formats or offers, or what else might be causing those differences.

Ethnicity - Index cf. Overall

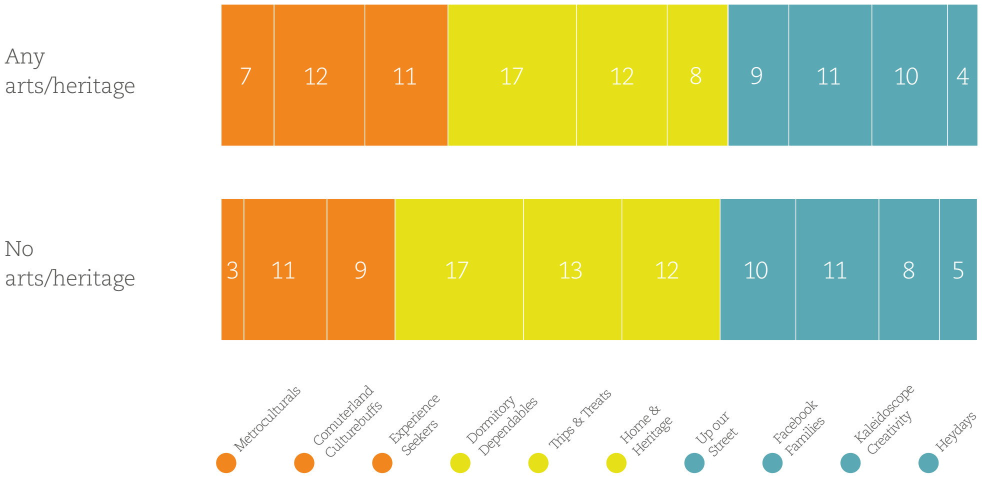


Age - Index cf. Overall



Booking in Lockdown

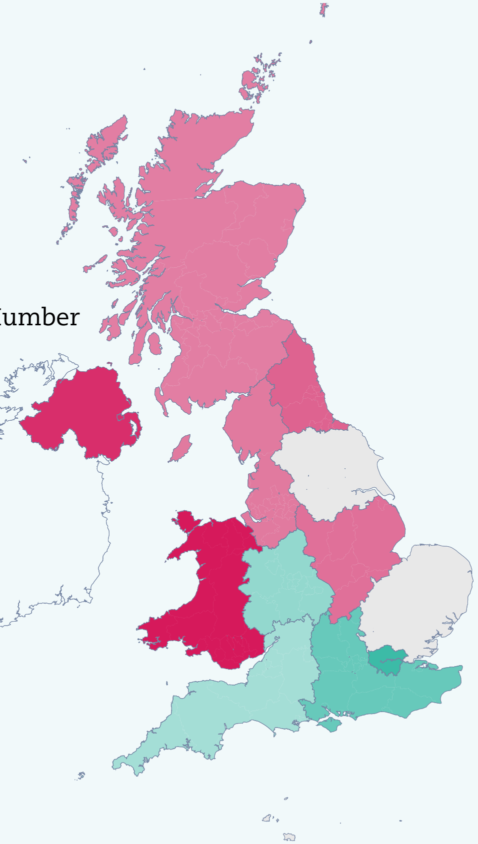
This chart shows the proportion of people from each Audience Spectrum group which said that they had attended any like arts/heritage since March 2020, compared to those who had not.



Home & Heritage were a much larger proportion of the latter. Only 28% of this group had been to any arts or heritage since March (compared to 34% overall). Despite this group being particularly interested in heritage, the 21% who had been to heritage in this period is well below the 28% of the overall population that have been, reflecting their particular reluctance to go out and about (and/or the impact of many in this group shielding).

The greatest difference in the other direction was among Metroculturals, 50% of whom had been to arts/heritage, compared to the 34% who had attended overall. Indeed, a higher proportion of Metroculturals than that (36%) of this group had been to heritage alone. For other types of activity, 20% had been to films in the cinema, 18% to performing arts and 14% to visual arts, showing how keen this group were to return at the first opportunity (and, being largely London-based, that opportunity was also more available than for many others).

125	London
115	South East
109	West Midlands
107	South West
100	Yorkshire & the Humber
96	East
89	Scotland
88	North West
87	East Midlands
85	North East
73	Northern Ireland
63	Wales



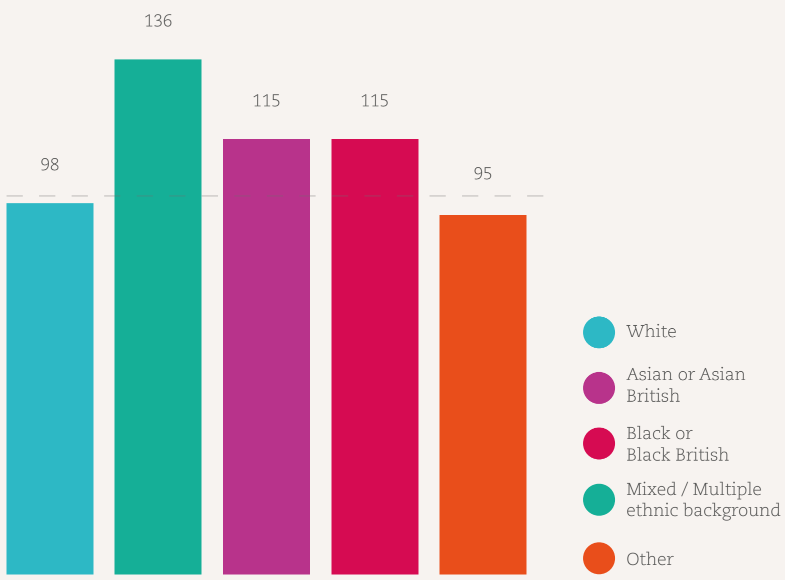
The regional view shows marked differences, especially between London and the South East and other areas — in part reflecting the difference in local lockdown regimes (in Scotland, Wales and Northern Ireland, as well as North East, North West and East Midlands in England). The figure for Wales is particularly low (21% having done any arts or heritage, an index of 63 compared to the UK-wide average), reflecting the extensive local lockdowns covering major population centres, prior to the UK-wide second lockdown.

Booking in Lockdown

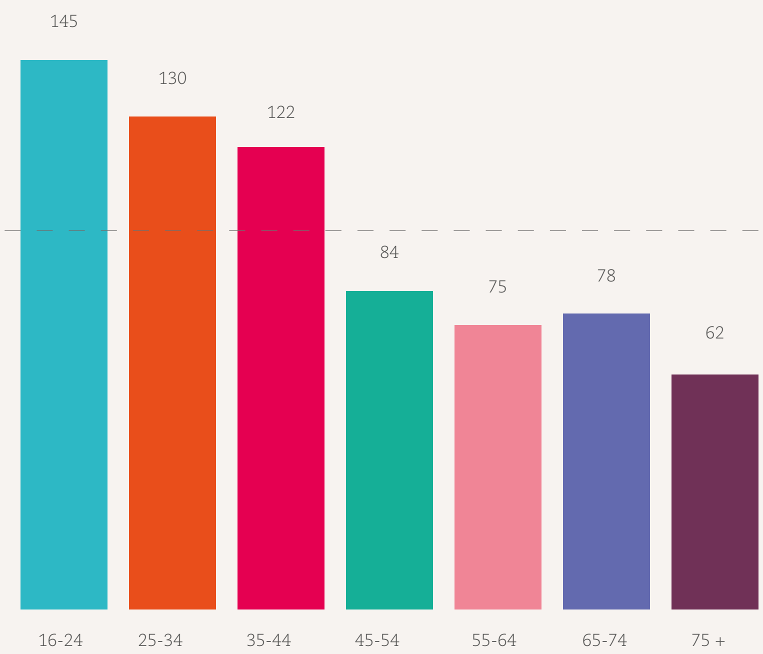
As with digital engagement, those from Asian, Black and Mixed ethnicities have engaged in in-person arts/heritage at a higher rate than those from white backgrounds (indices of 115, 115 and 136 compared to overall, respectively). This may reflect the younger average age of those in this group within the UK population, since there is also a substantial difference in engagement by age.

Those aged 16-24 are 45% more likely to engage than average; those aged 75+ are 38% less likely. This difference, although present to a small extent before, has opened up substantially during COVID.

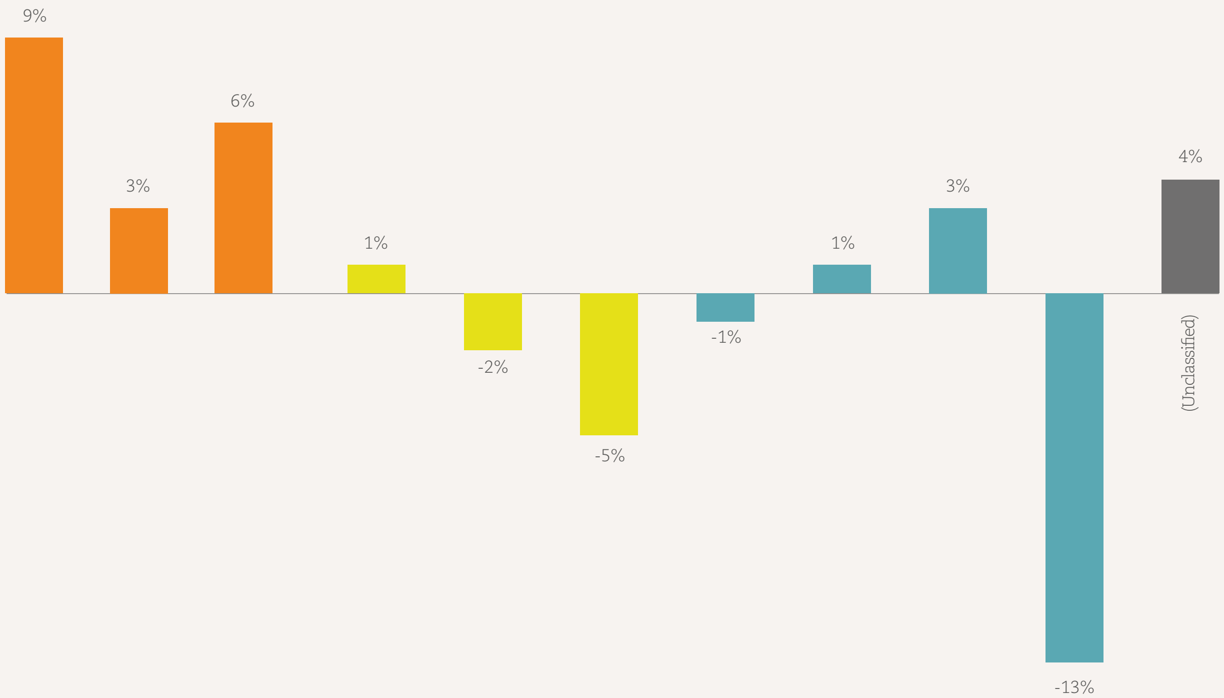
Ethinicity Index



Age Index



Considering What's Next



The top charts show the proportion by Audience Spectrum who have either booked or expressed interest in booking for future events (specifically, the question '*Over the next couple of months, what best describes your position about attending the following…*' was asked for each of a list of a dozen arts and heritage activities listed, and the options provided 'have booked/organised a visit', 'interested but not booked/organised', 'not ready to do this yet' and 'not interested'. Anyone who selected the first two options for any of the activities was included as someone who had 'booked or expressed an interest').

The three higher engaged groups, unsurprisingly, form a higher percentage of those who have 'booked or expressed an interest' than those who had not (27% compared to 22%), although once again, this biggest difference was the lower proportion of Home & Heritage, reflecting the greater reluctance to attend in future already observed.

The lower chart shows the proportionate difference within segments. This highlights that Heydays are even more likely than Home & Heritage to be put off, and that Metroculturals and Experience Seekers are proportionately more likely to be looking to engage in the near future.

This is compounded by looking at how often those who do intend to visit in the future expect to do so. Many of those groups which have a lower proportion inclined to attend than previously, such as Commuterland Culturebuffs, Dormitory Dependables and Home & Heritage, are also those where future attenders are more likely to expect to attend less often if they do (with 66%, 63% and 62% expecting to attend 'less often' compared to 58% overall). Indeed, even that 58% attending less often is a particular concern, given that only 6% anticipate attending more often.

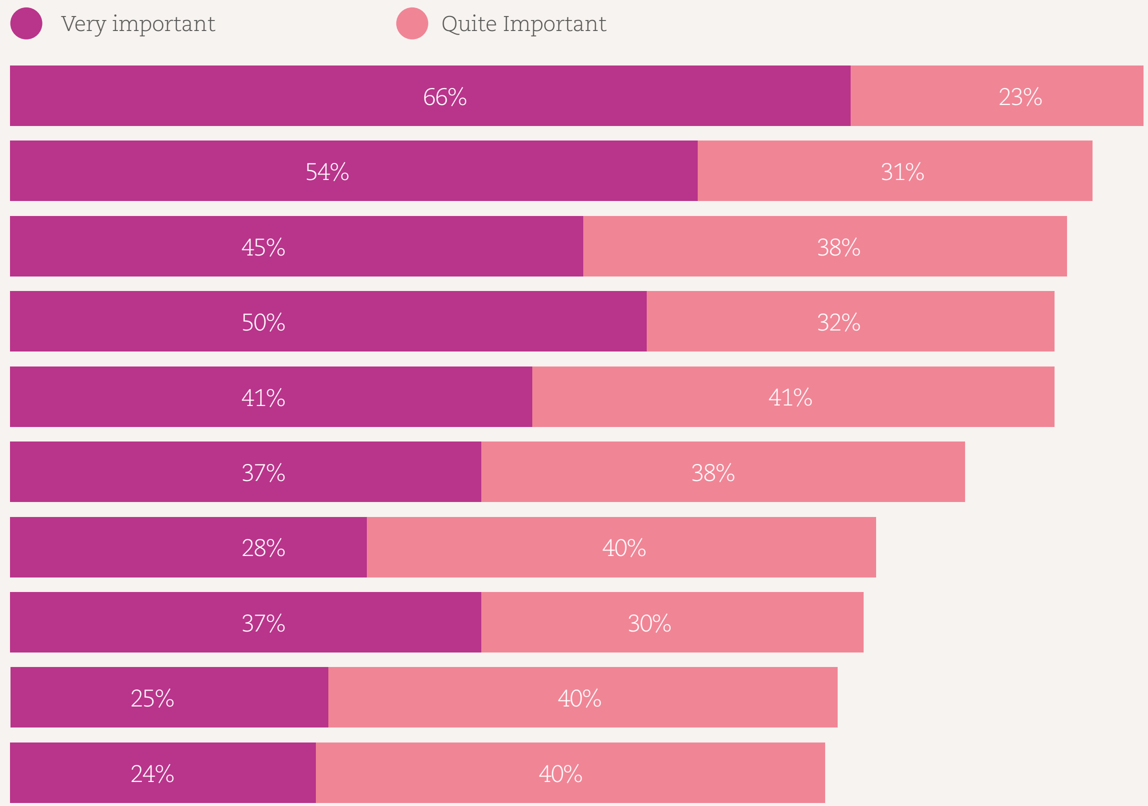
Considering What's Next

Respondents were asked which of a range of ten factors would be important in their decision-making if there was something they intended to do or see, rated by whether they were 'very important', 'quite important', 'not very important', 'not at all important' or 'not sure'.

At least 64% or respondents said all of the factors were at least 'quite important', of which the most highly rated were 'a clear refund policy' and 'information before booking on safety measures taken' (by 89% and 85%, with 66% and 54% saying they were 'very important'). The only other measure which 50% said was 'very important' was the ability to get there with limited contact from other people outside my party'. 'Set routes through the venue' and 'timed entry so that it doesn't get too busy' were also considered at least 'quite important' by over 80% of people.

The more detailed picture on the next page shows which factors were more or less important for different Audience Spectrum segments. Some overall implications are clear, with Metrocultural and Experience Seekers rating all factors the same or lower than overall, particularly those relating to information in advance and routes to and around venues that avoid crowding. This may be because of greater acceptance of risk, or because these city-based segments do not see a cultural visit as being as substantial an additional risk as other segments, living in less crowded areas, might.

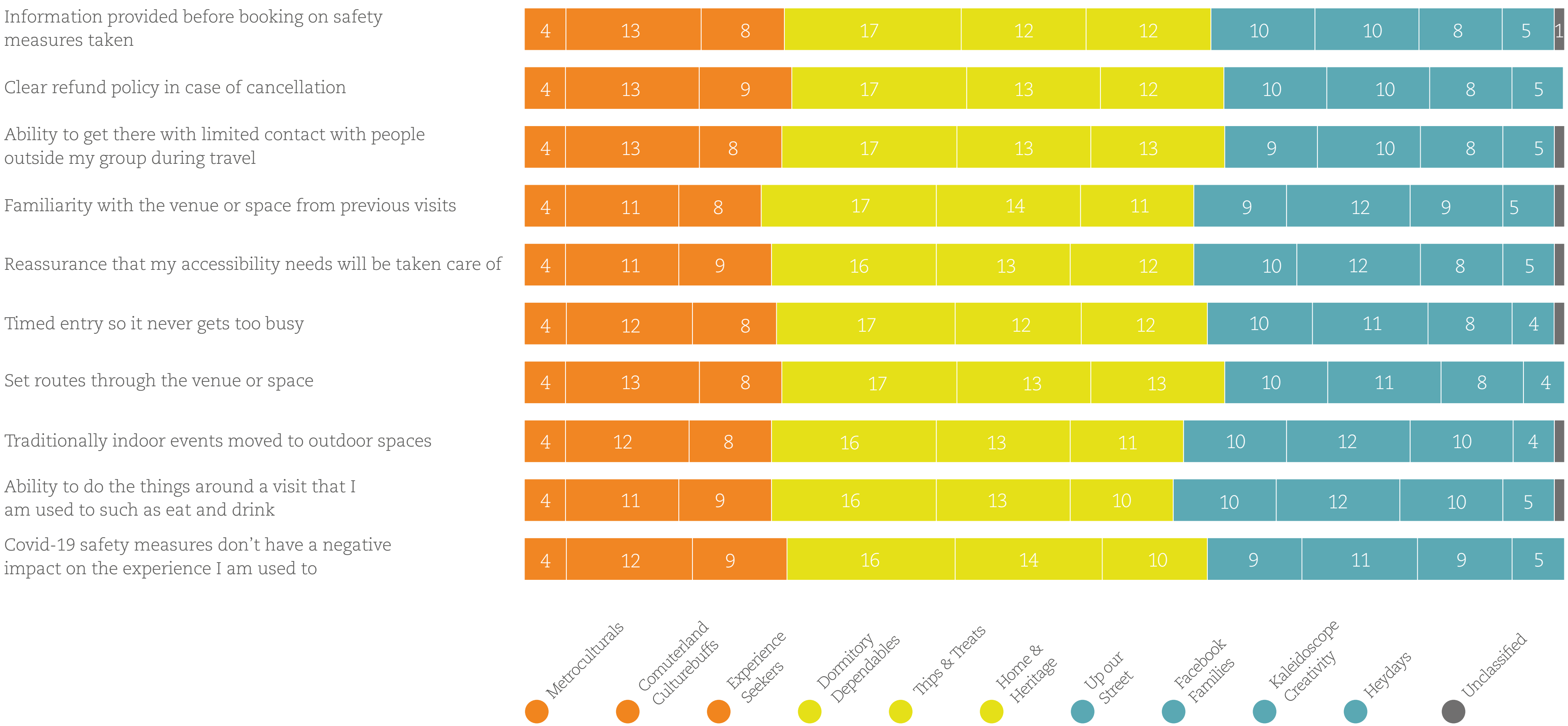
Factors in Decision Making



Considering What's Next

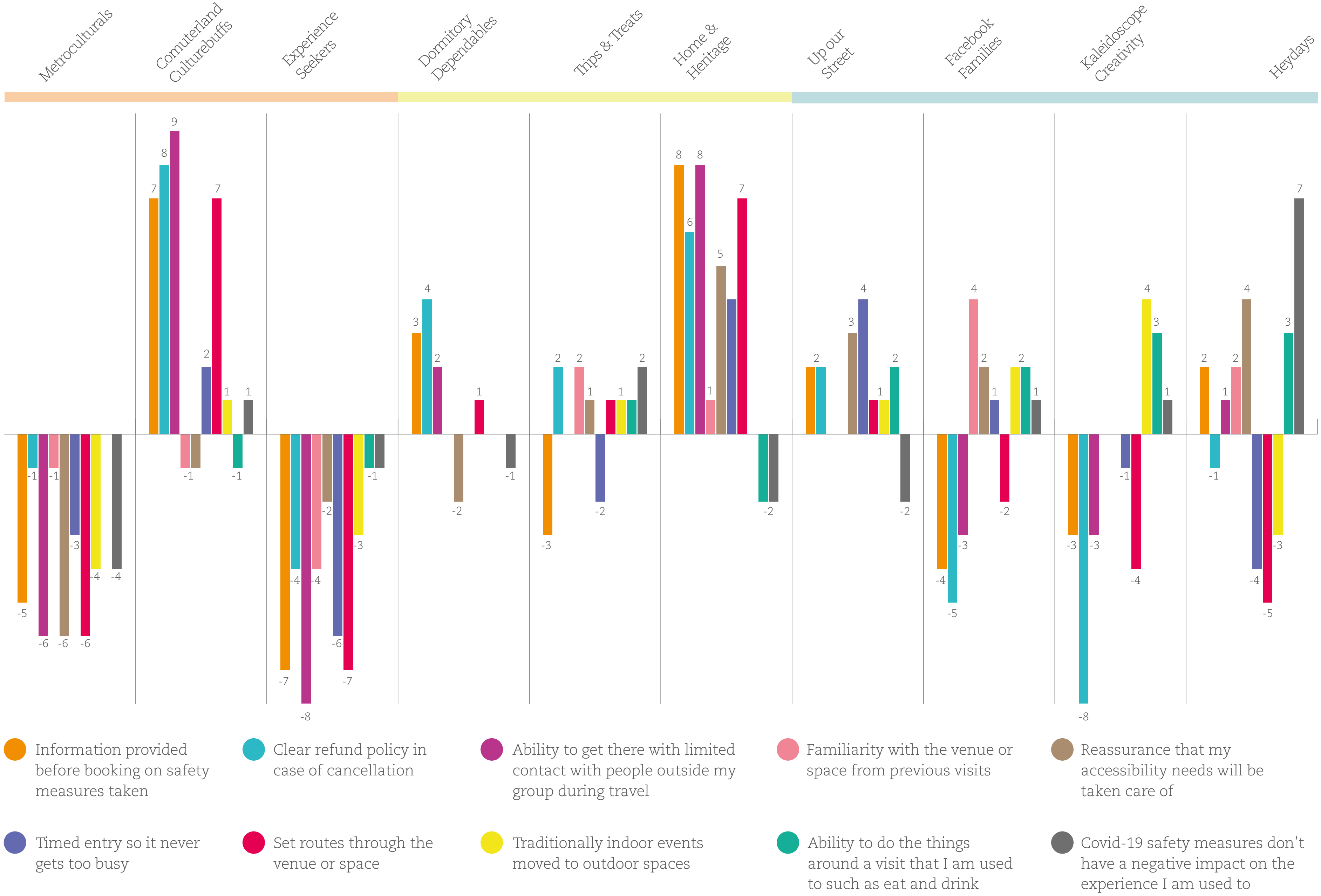
Commuterland Culturebuffs, Home & Heritage and Heydays all have above-average ratings for most factors. The first two rate those same factors that Metroculturals and Experience Seekers are less concerned about as being of higher priority. There are, however, a few factors about which they are less concerned. For Commuterland Culturebuffs, 'familiarity with the venue' and 'reassurance that access needs will be met' are rated slightly lower: perhaps because of a greater underlying confidence and familiarity with venues.

For Home & Heritage, there is greater acceptance that COVID will negatively impact the visit, whether it's making the venue less familiar, limiting the surrounding offer or a general impact on experience. For Kaleidoscope Creativity and Facebook Families, the refund policy is of less concern, but they are more interested in indoor events being moved outdoors and familiarity with the venue, respectively.



Considering What's Next

Important factors for deciding to re-attend: difference by Audience Spectrum segment from overall



Context and Methodology

Background and Methodology

The Audience Agency commissioned Dynata to carry out a population survey online, with quotas based on age, sex, ethnicity, region and Audience Spectrum segment. 6,055 responses were received in the first wave, collected from late October to early November, 2020. Additional waves of surveys will be undertaken every couple of months until autumn 2021. This report provides a summary of initial findings; there will be more summaries by topic and for future waves of the survey.

COVID-19: Impacts on the Cultural Industries and the Implications for Policy

The research forms part of the COVID-19: Impacts on the cultural industries and the implications for policy research programme, led by Centre for Cultural Value Director, Professor Ben Walmsley. The programme is funded by UK Research and Innovation (UKRI) Covid rolling call and issued through the Arts and Humanities Research Council. A national consortium of researchers and cultural sector partners will analyse existing datasets and conduct targeted new research on the impacts of the pandemic on cultural organisations, practitioners and audiences. Researchers from the wider Centre for Cultural Value study team will be continuously collaborating on the research design as it goes forward. The COVID Monitor provides a key longitudinal research strand, allowing project partners to understand the changing impact of COVID on the cultural attitudes and behaviour of the UK population.

Audience Spectrum

Audience Spectrum segments the whole UK population by their attitudes towards culture, and by what they like to see and do. There are 10 different Audience Spectrum profiles that you can use to understand who lives in your local area, what your current audiences are like, and what you could do to build new ones. Audience Spectrum is the most accurate tool the sector has ever had to help target audiences and include a wider public. Analysis and customer tagging with Audience Spectrum work at both household and postcode levels, to help cultural organisations understand audience profile and reach, enabling really accurate targeting of activity and communications.

Get in touch to find out more

More about this report or the COVID Monitor

To discover more about this report or the COVID monitor, please contact:
Oliver.Mantell@theaudienceagency.org
Policy Research Director, The Audience Agency

Richard.Turpin@theaudienceagency.org
Head of Research Services,
The Audience Agency

Disclaimer

The information contained within this report is not intended to be used as the sole basis for any business decision and is based upon data that is provided by third parties, the accuracy and/or completeness of which it would not be possible and/or economically viable for The Audience Agency to guarantee.

The Audience Agency's services also involve models and techniques based on statistical analysis, probability and predictive behaviour. Accordingly, The Audience Agency is not able to accept any liability for any inaccuracy, incompleteness or other error in this report.

Design: timjukesdesign.com

General Enquiries

For general enquiries about The Audience Agency's work, including Audience Spectrum, please contact: Hello@theaudienceagency.org

London Office
Rich Mix
35-47 Bethnal Green Rd,
London E1 6LA

T 020 7407 4625

Manchester Office
Green Fish Resource Centre
46–50 Oldham Street, Northern Quarter
Manchester M4 1LE

T 0161 234 2955

Registered in England & Wales 8117915

Supported using public funding by
ARTS COUNCIL ENGLAND

The Audience Agency is funded by Arts Council England, Creative Scotland and Arts Council Wales, to support cultural organisations to gain a deeper understanding of current and potential audiences. This research took place as part of our work with The Centre for Cultural Value on its AHRC COVID research programme.