CENTRE FOR CULTURAL VALUE

We Want Our Audience Back!

Insights from The Cultural Participation Monitor,

Europaeische Theaternacht Webinar

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Outline

- The UK Covid Context
- Our Research background
- The emerging picture of arts engagement
- Attitudes to engagement
- Implications: 7 things we think UK organisations should do

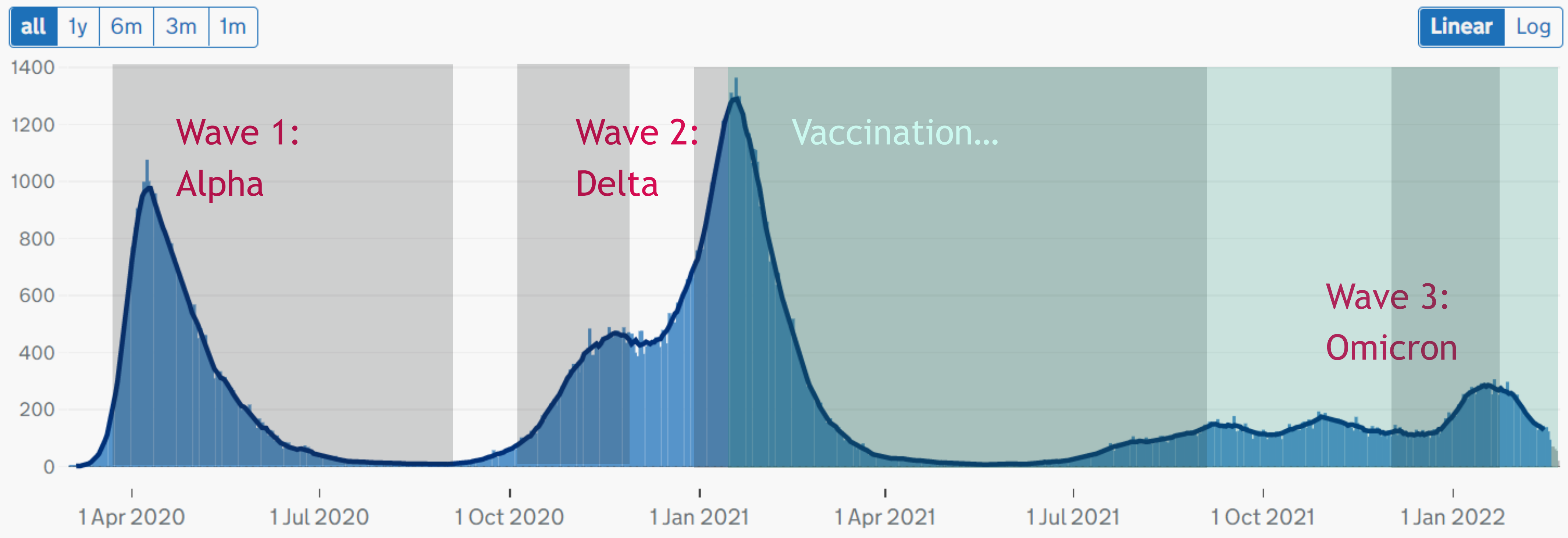
Deaths in United Kingdom ▾

183k (where C-19 on Death Certificate)

Lockdowns / restrictions

incomplete. Data are shown by date of death.

Daily | Cumulative | Data | About



Daily new confirmed COVID-19 deaths per million people

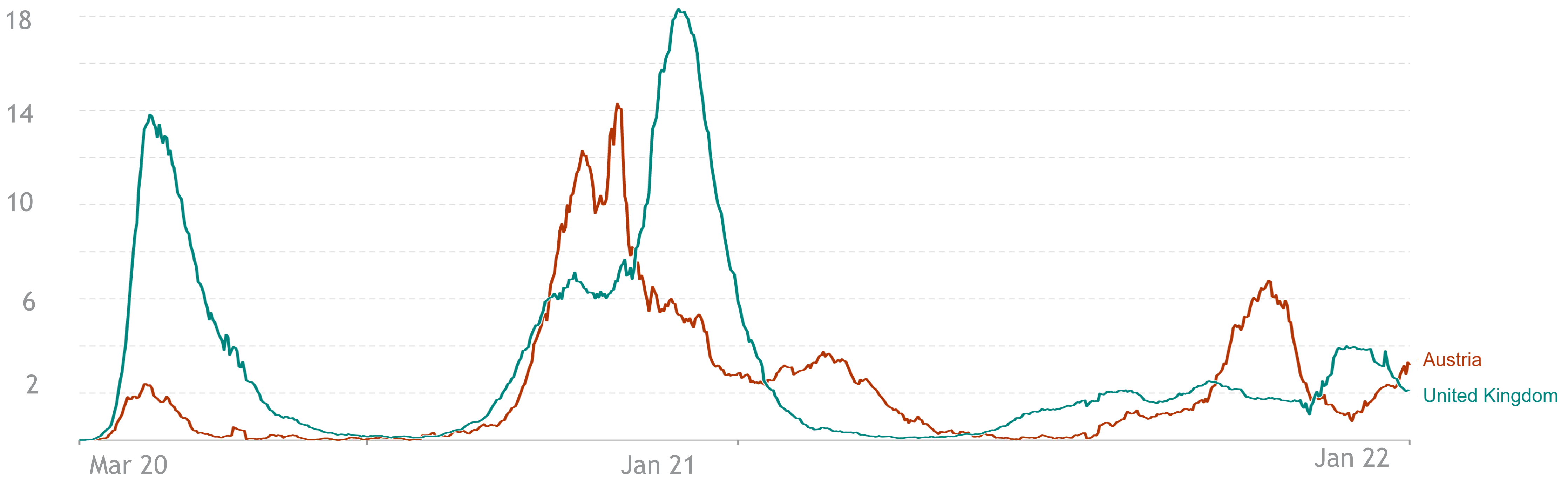
7-day rolling average. For some countries the number of confirmed deaths is much lower than the true number of deaths. This is because of limited testing and challenges in the attribution of the cause of death.

Our World in Data

Cases:

UK = 274k/M

Austria = 276k/M



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COVID 19 Impact Research Project

Delivered by Centre for Cultural Value at University of Leeds, in collaboration with the Creative Industries Policy and Evidence Centre (PEC), The Audience Agency and leading researchers.

Funded by UKRI, Covid rolling call and issued through the AHRC

Public impact

Population Monitor
Social media

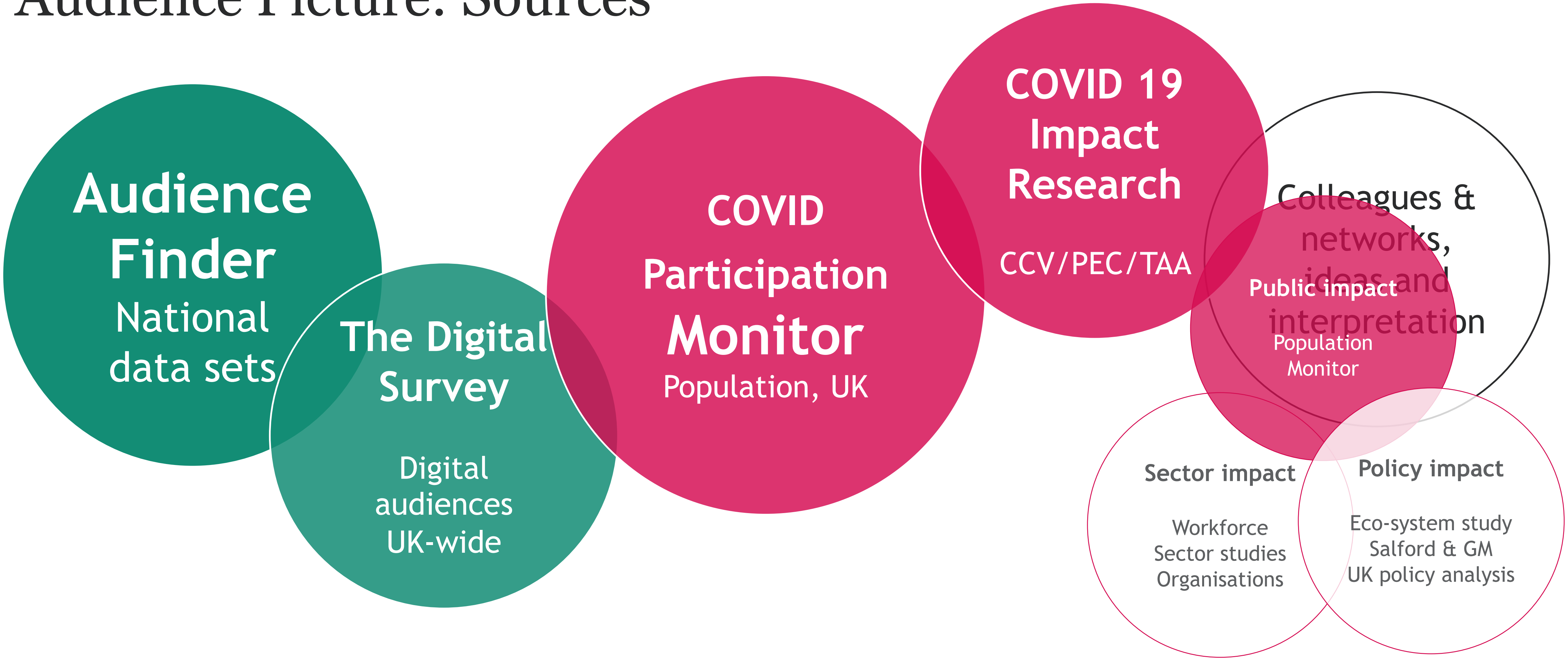
Sector impact

Workforce
Sector studies
Organisations

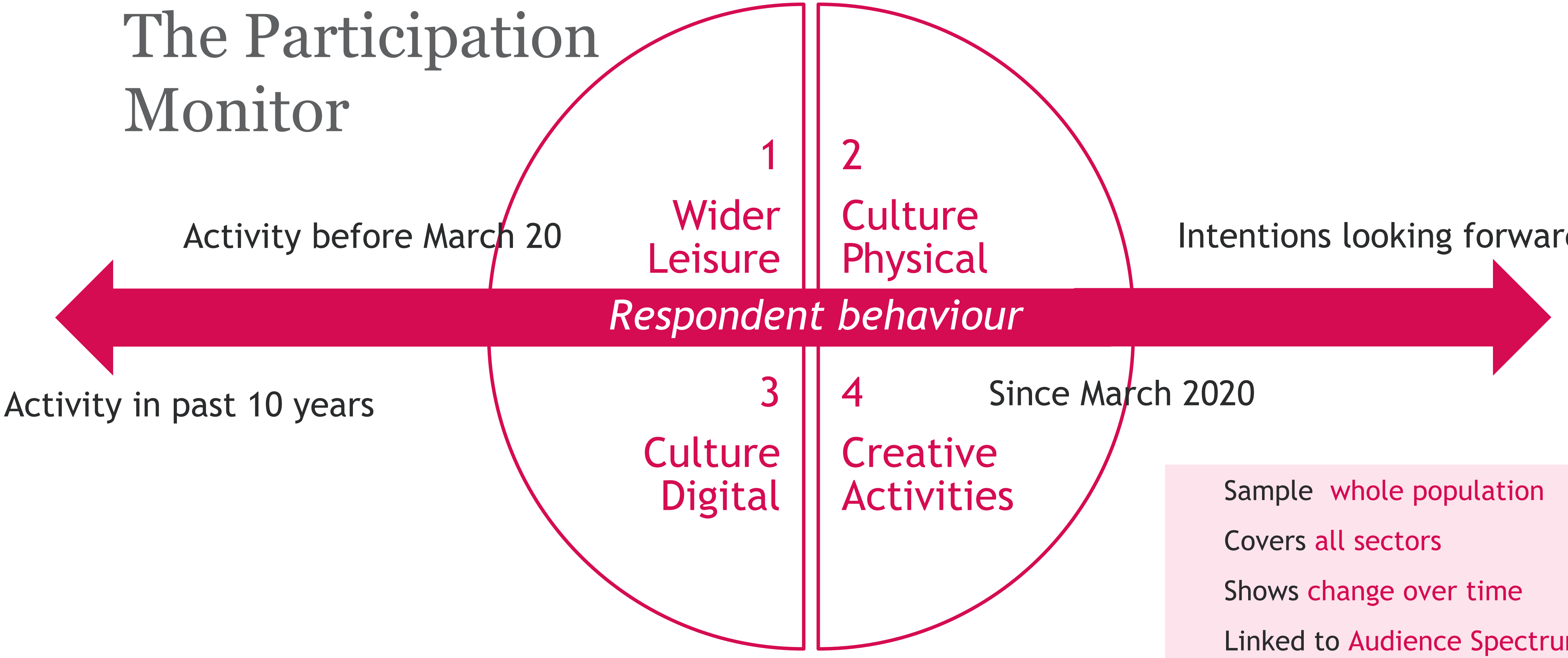
Policy impact

Eco-system study
Salford & GM
UK policy analysis

Audience Picture: Sources



The Participation Monitor



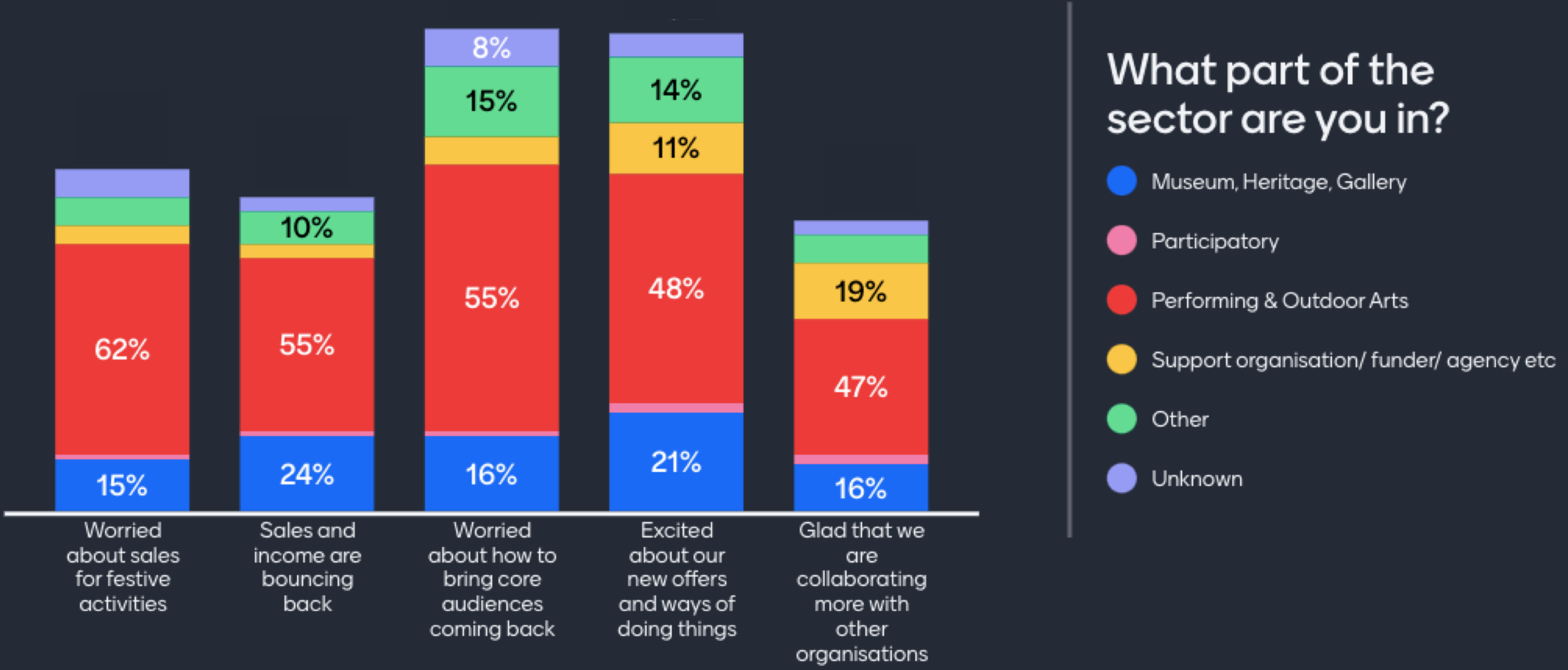
Sample whole population

Covers all sectors

Shows change over time

Linked to Audience Spectrum

Informal poll marketing practitioners, November 21



Exaggerate

- Inequality of access and engagement
- Precarity of workforce
- Collaboration

Accelerate

- Digital offers and digitally enabled approaches
- The age gap
- Visitor-/ participant-centred
- Civic role/ activism

Overall Engagement

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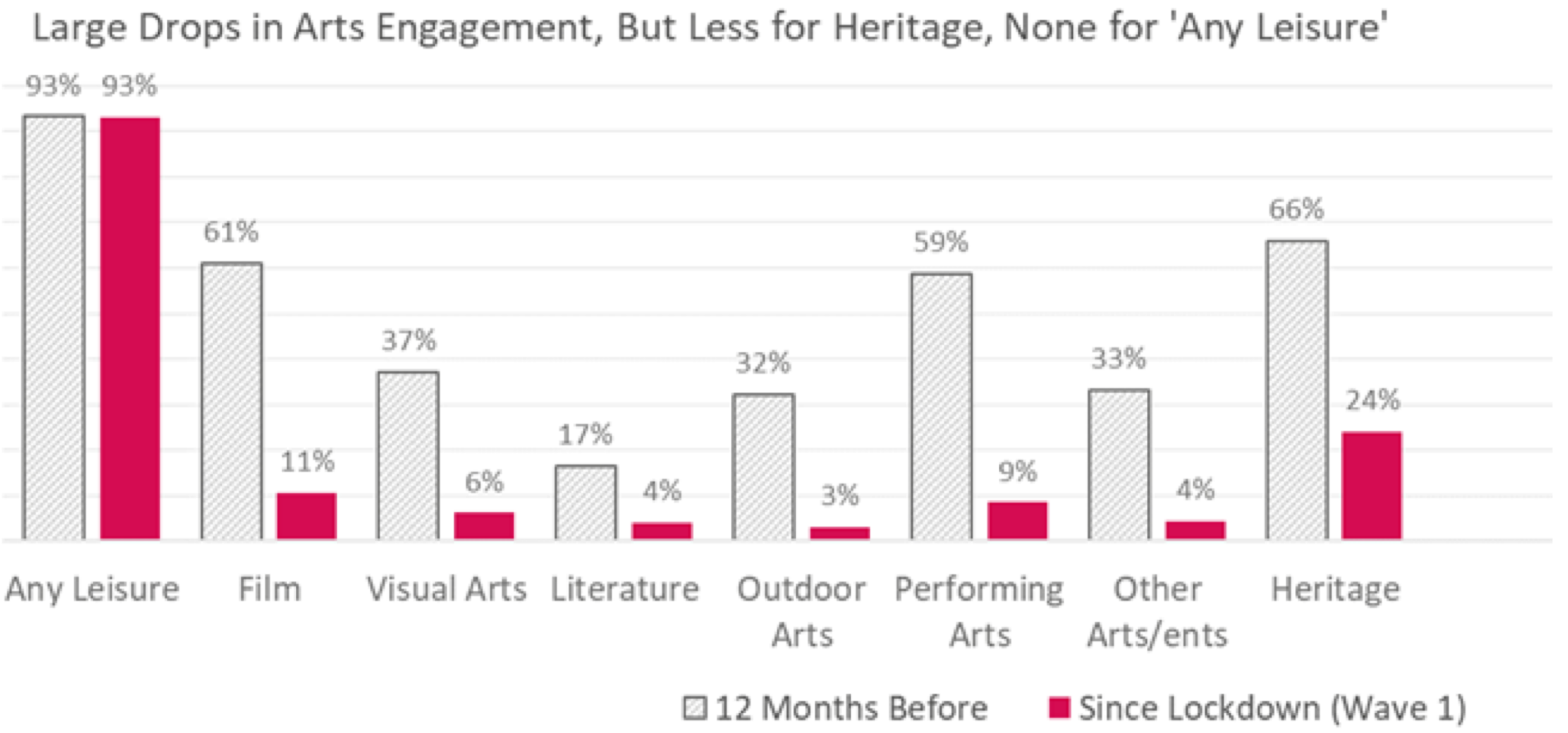
The emerging picture

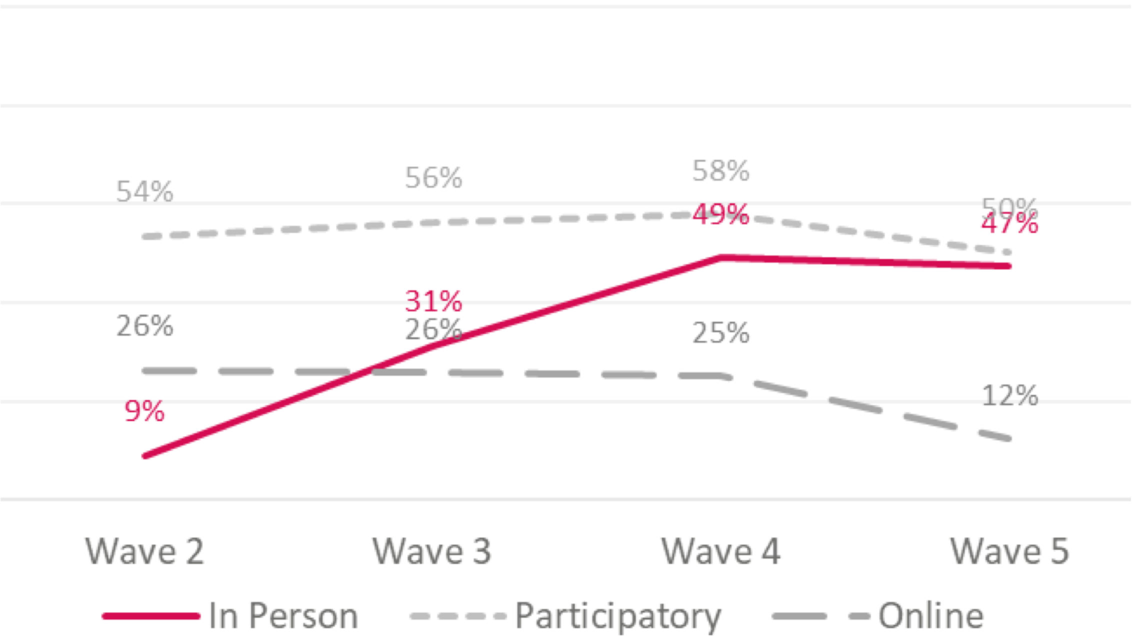
- Expectations: outdoor arts up 12%, museums level, theatre down 3%, cinema down 8%
- 55% missing the opportunity
- 42% visited in 2019 vs 21% during lock down and 27% “planning to now”
- 98% think safety measures and COVID accommodations adequate
- Only 3% say it was off-putting
- 81% visitors ”positive impact on wellbeing”

Overall Engagement

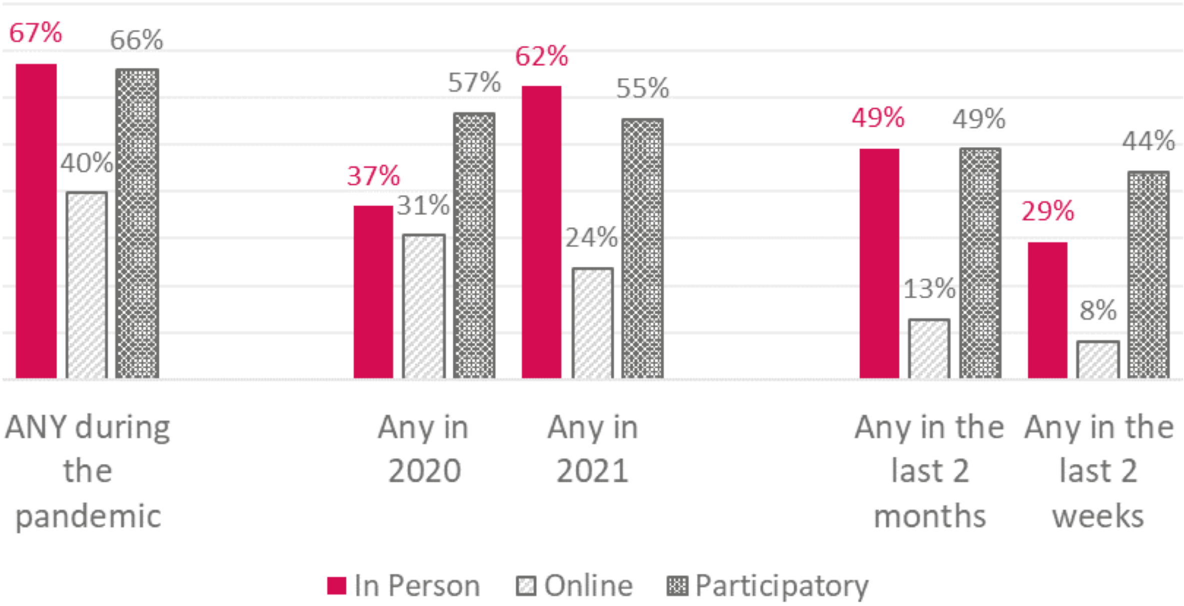


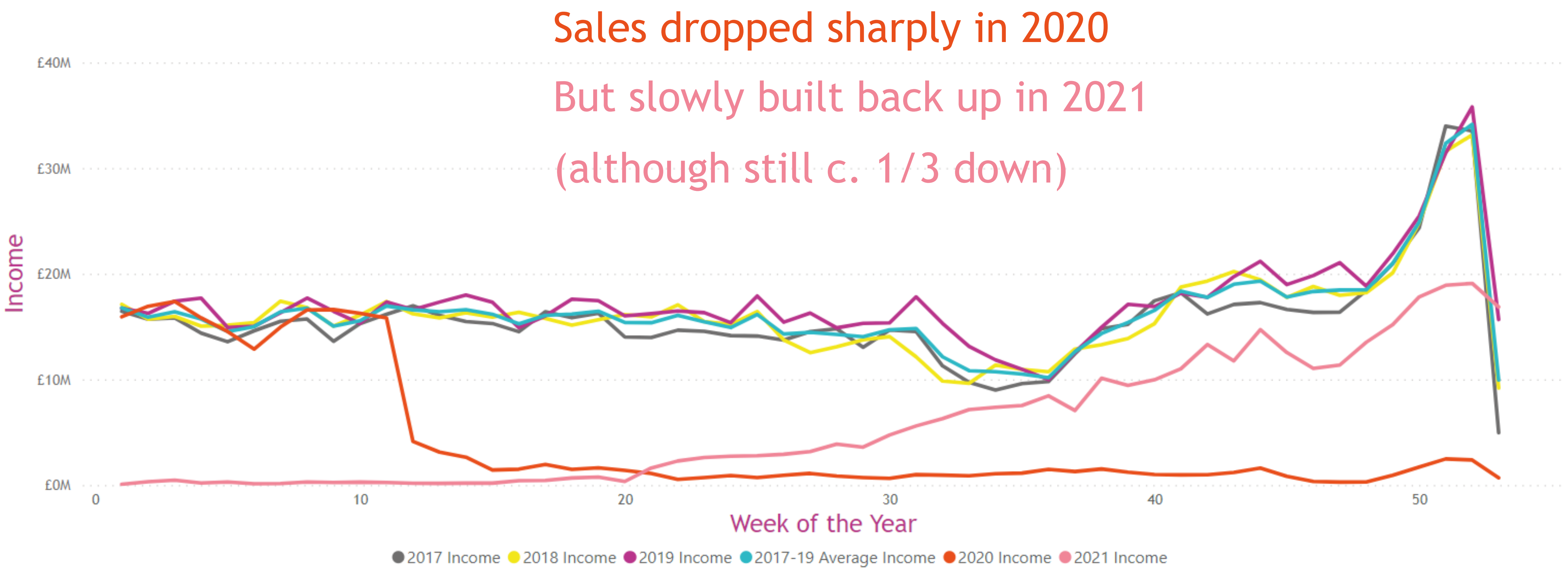
Overall Engagement

Engagement in Last 2 Months, Waves 2-5



In Person Engagement has Risen, as Online has Fallen





£828M	£857M	£918M	£867.79M	£228M	£303M	£640M	£565M
2017 Income	2018 Income	2019 Income	2017-19 Av. Income	2020 Income	2021 Income	2020 Shortfall	2021 Shortfall

Attitudes to Attendance

Static attitudes through COVID continue

Younger, with children, urban…

1:3

“Happy to attend”

In need of reassurance

1:3

“With reservations”

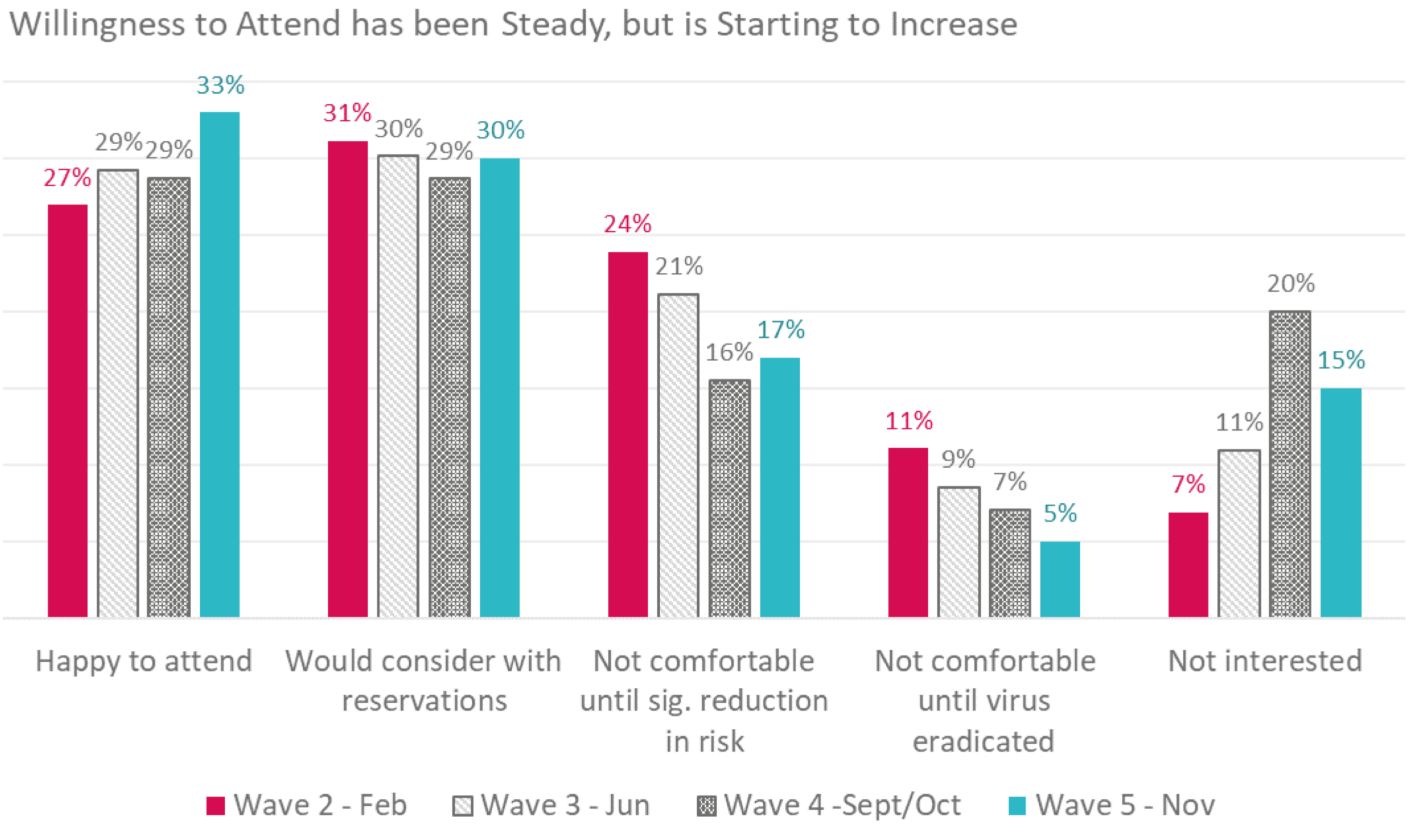
Older, rural/ small towns. Likes: vaccine passports

1:3

“Not until risk is over”

“Not interested”

Only Gradual Change in Willingness to Attend…



Happy: 30%

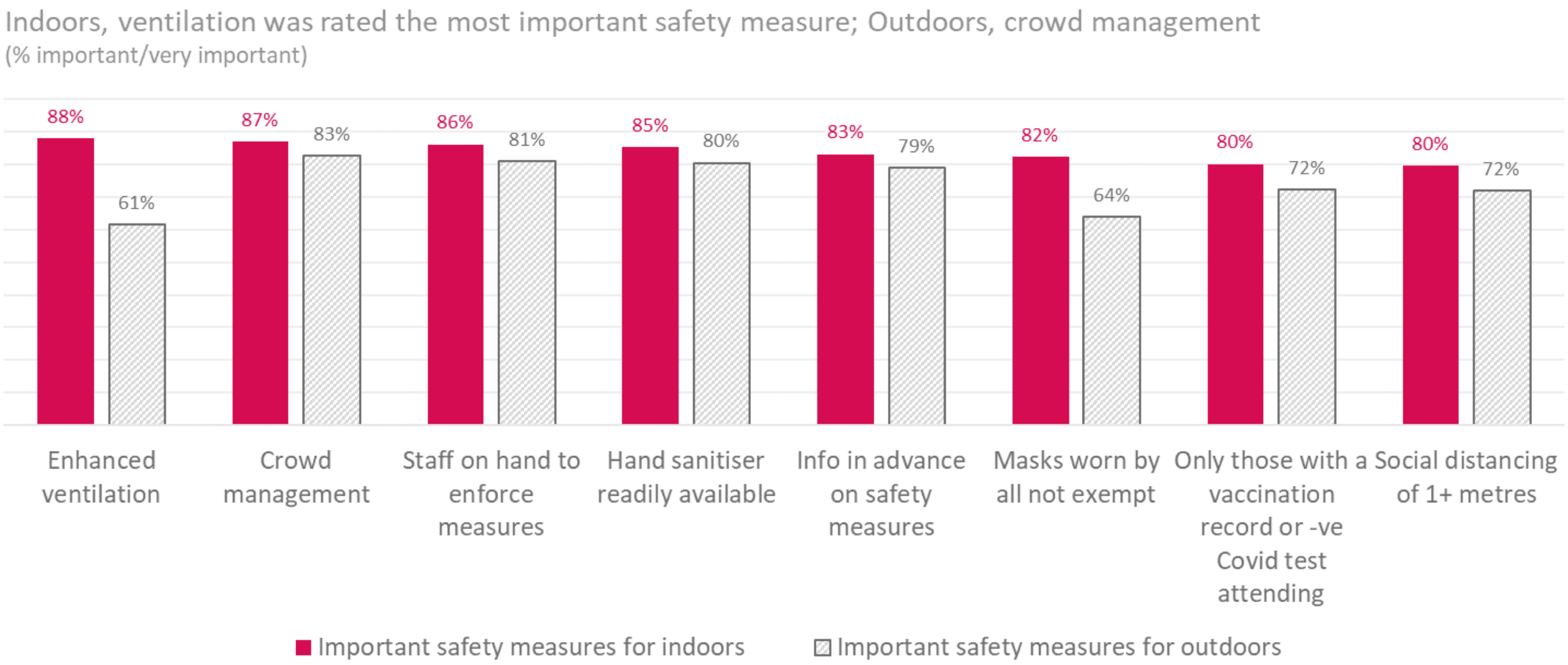
Wd Consider: 30%

Not Comfortable/

Interested: 40%

([only] a few % higher for previous attenders)

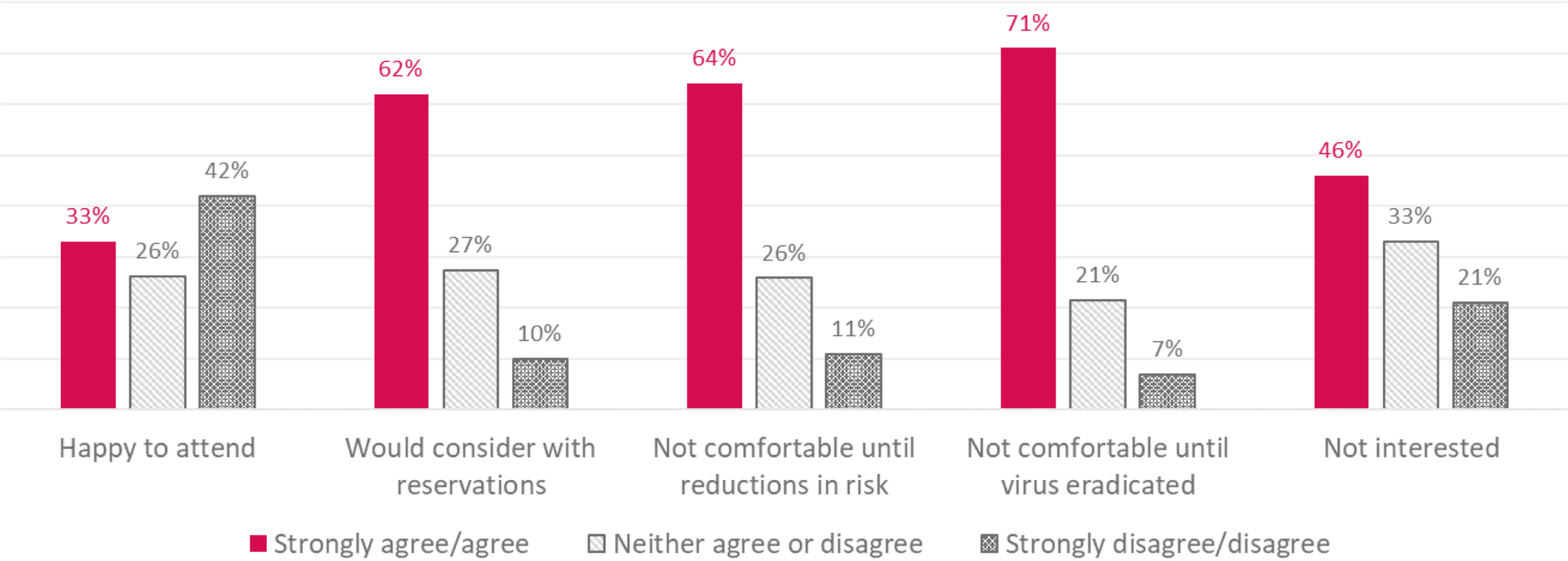
Safety Measures…



Risk matters...

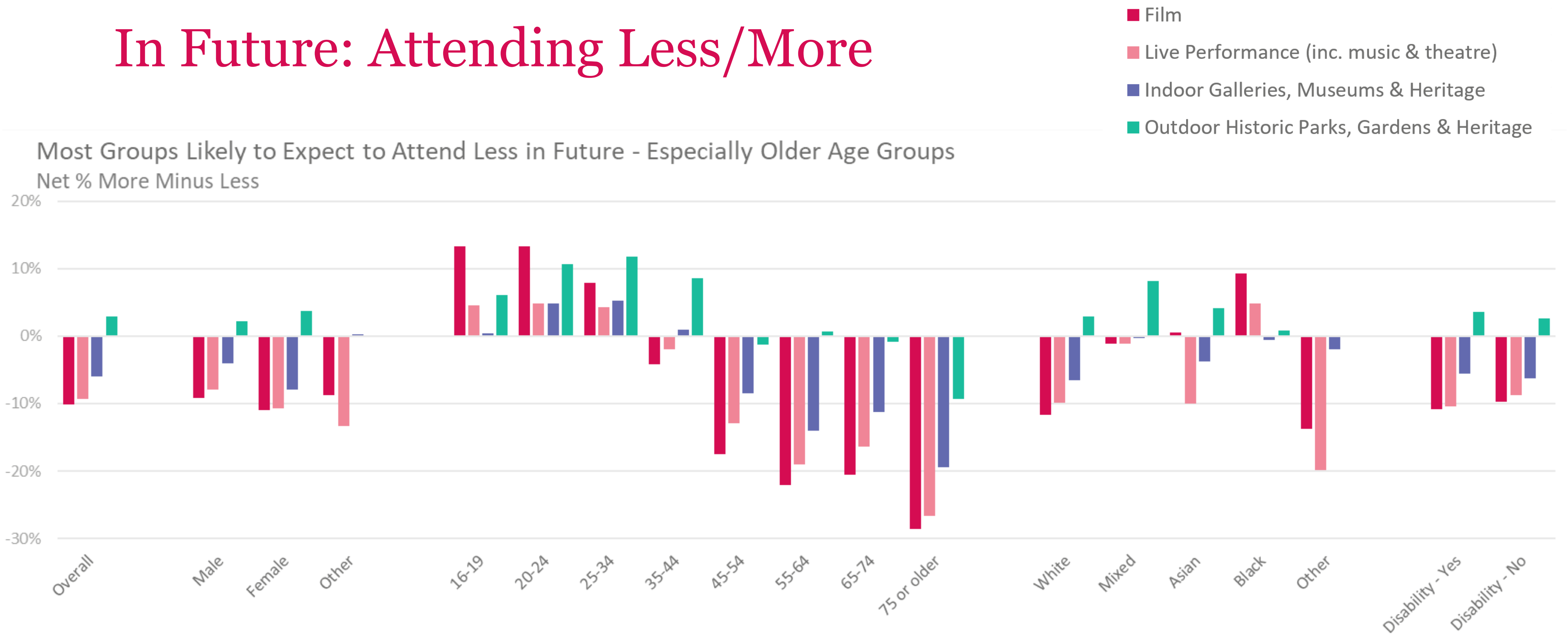
1/3 of those 'happy to attend' are **worried about falling ill with Covid-19**

The proportion is approx. double in most other categories

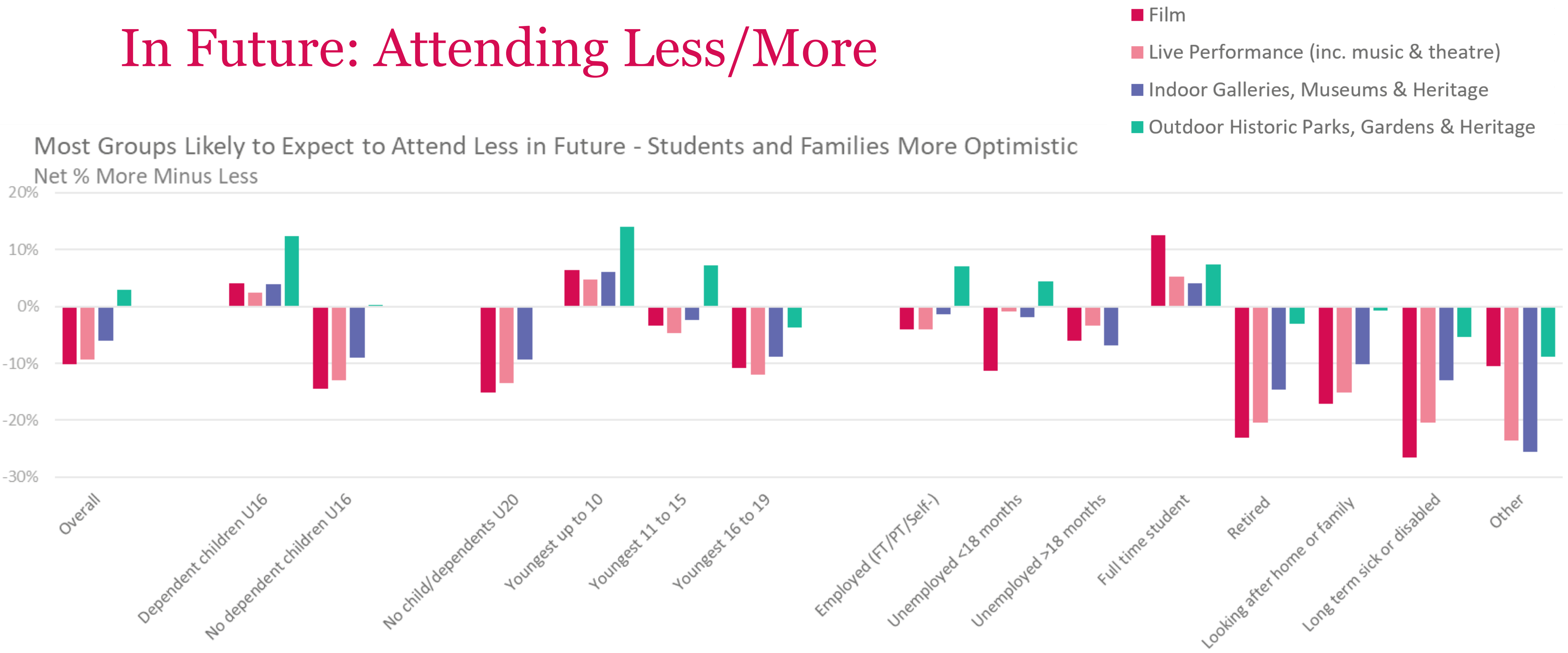


Future Attendance

In Future: Attending Less/More



In Future: Attending Less/More



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Implications for the future?:

Lower Engagement?

- Older
- Lower prev. engaged
- Rural
- Not Local
- No children in household
- Traditional
- Indoor

Higher Engagement?

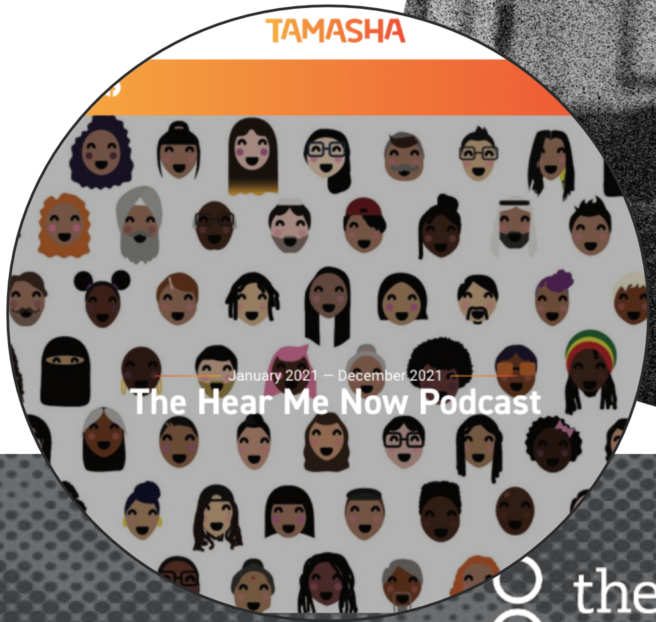
- Younger
- Higher prev. engaged
- Urban
- Local
- Families
- Contemporary
- Outdoor

Home & Heritage
Heydays
Up Our Street
Commuterland Culturebuffs
Dormitory Dependables
Trips & Treats
Facebook Families
Kaleidoscope Creativity
Metroculturals
Experience Seekers

7 things...
we think UK organisations can do next

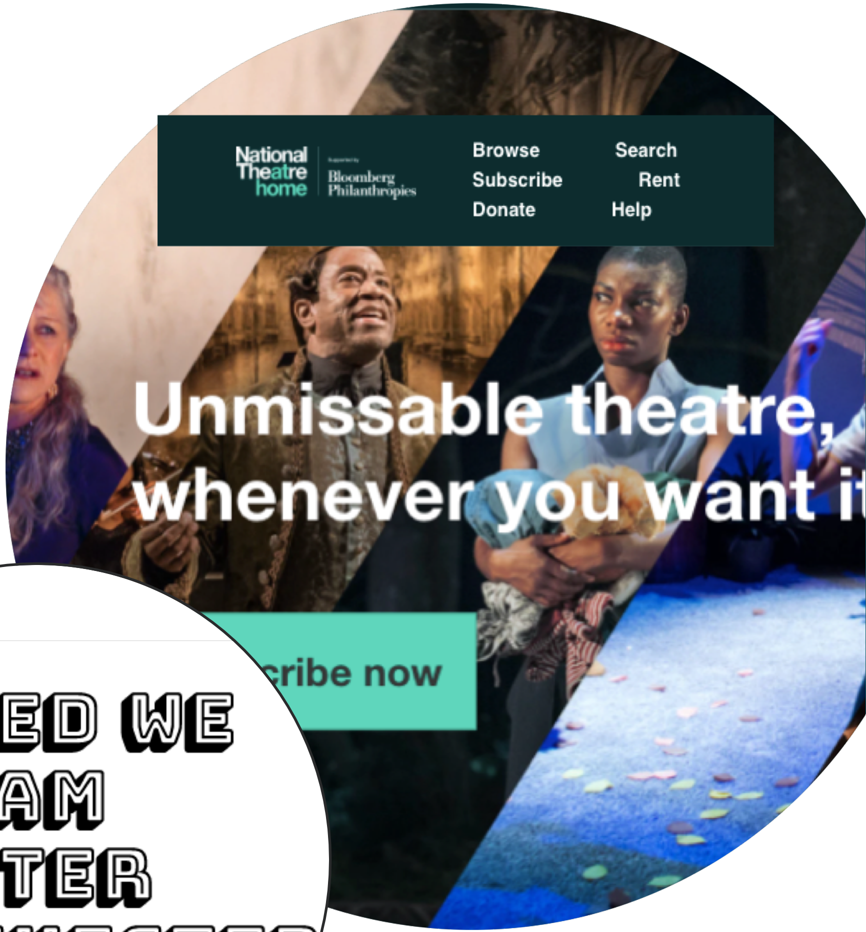
1. Keep building the digital offer

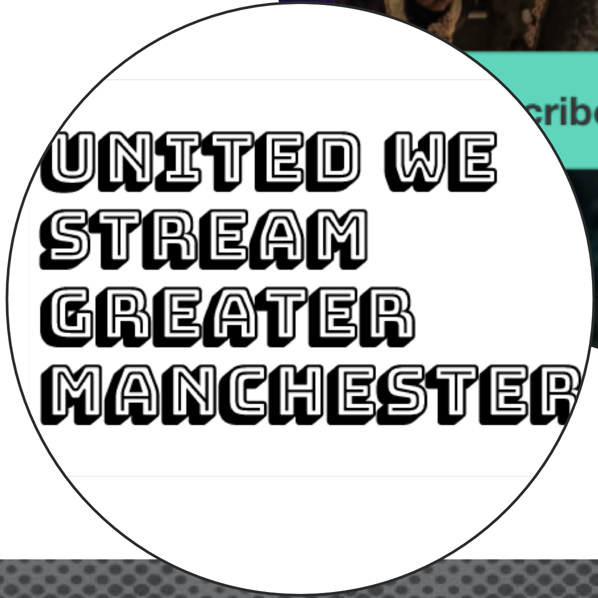
- Digital engagement greatly increased but not widened access
- Attracted next generation, arts-interested audiences
- (Older regulars anticipate will do more in future)
- Younger
- Immersive-participatory (hybrid, social experiences)
- Many organisations stopping digital offers
- Keep things regular, short
- Keep experimenting – get feedback



2. Find a payment model that works

- >60% people say they will pay
- Preference for fixed price/ pay-to-view access
- Rather than optional/ subscription
- High volume/low cost online
  vs low volume high cost in person
- Strong arguments for collaboration
  and other platforms
- Funds to help scale and experiment





3. Get to know younger audiences

- Address long-standing problem ageing audiences?
- Younger audiences are less risk averse
- Show increased appetite to engage (than pre?)
- Those with children want to go out
- Good news for metropolitan venues
- An opportunity to experiment (esp hybrids)
- And collect feedback
- Big successes with learning/ curriculum online

4. Support more creative participation

- What can institutions do to help “everyday creativity”?
- Creative participation “good for my wellbeing”
- Social opportunities popular and linked to wellbeing
- People across demographics interested in creative activities online
- Participation practitioners have successfully used digital to increase and extend engagement
- Co-creation practitioners are at high risk

5. Build a "cause"

- COVID has increased the numbers and extent to which people think of arts and culture as a "good cause"
- The numbers of those willing to support the arts has slightly increased
- 50% agree/*"pandemic has made me want to support cultural organisations more than I did before"*
- 57% *"the pandemic has made me feel that arts and cultural organisations are more worthy of support than I did before'*.
- Younger >45 more interested in supporting
- People with children under 16 much more likely to give

6. Be Flexible

- COVID demonstrated that we could be more user-centred
- Refunds and flexible booking top measure
- At-seat ordering, additional “Your Visit” information,
- Top-rated benefit for digital “watching when I want to”
- Going outdoors
- Accessible content
- Convenience as a hygiene factor
- Expectations may have changed

7. Go Local

- Nearly 40% audiences said they would be doing cultural activities more locally in future
- 90% of "work from homers" will continue, in some degree
- More likely arts-interested groups
- Tend younger or to have children
- Keen interest to return

= changing patterns

- New campaigns and offers
- New partnerships

Thank you

Talk to us
theaudienceagency.org/evidence
theaudienceagency.org/newsletters

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