The future of cultural engagement:

how will Covid-19 change the landscape?

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the audience agency

Outline

- Some background
- Sources, Resources & Headlines
- Behaviour change
- What change will endure?

The Audience Agency

- Not-profit charity
- Audience research, advice, training
- Arts, museums, heritage +
- Place-based cultural strategy
- Policy research
- Audience/ “people-centred” change
- Innovation & digital transformation

Bounce Forwards
COVID-19
Resources & Support

Funded by Arts Council England, Arts Council Wales and Creative Scotland

CENTRE FOR CULTURAL VALUE

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Understanding the difference culture makes

We are building a shared understanding of the differences that arts, culture, heritage and screen make to people's lives and to society. We want cultural policy and practice to be based on rigorous research and evaluation of what works and what needs to change.

culturalvalue.org.uk

UKRI Arts and Humanities Research Council

phf Paul Hamlyn Foundation

LOTTERY FUNDED · Supported using public funding by ARTS COUNCIL ENGLAND

Sources: The Covid-19 Insight Hub

- Audience Finder national data analysis
- Revenue Tracker: missing audiences
- Reopening research
- Digital Audiences Survey
- Population survey
- Research Round-up: one-stop-shop
- Audience Spectrum segmentation & COVID
- How-to route Maps

Bounce Forwards Covid-19 Insights

Find out what's happening with UK audiences

Subscribe here:

www.theaudienceagency.org/newsletters

audience finder

A collaborative data aggregation analysis and support service.

A database of all UK households and their cultural engagement.

Free to use, a condition of funding

CREATIVE SCOTLAND
ALBA | CHRUTHACHAIL
Cyngor Celfyddydau Cymru
Arts Council of Wales
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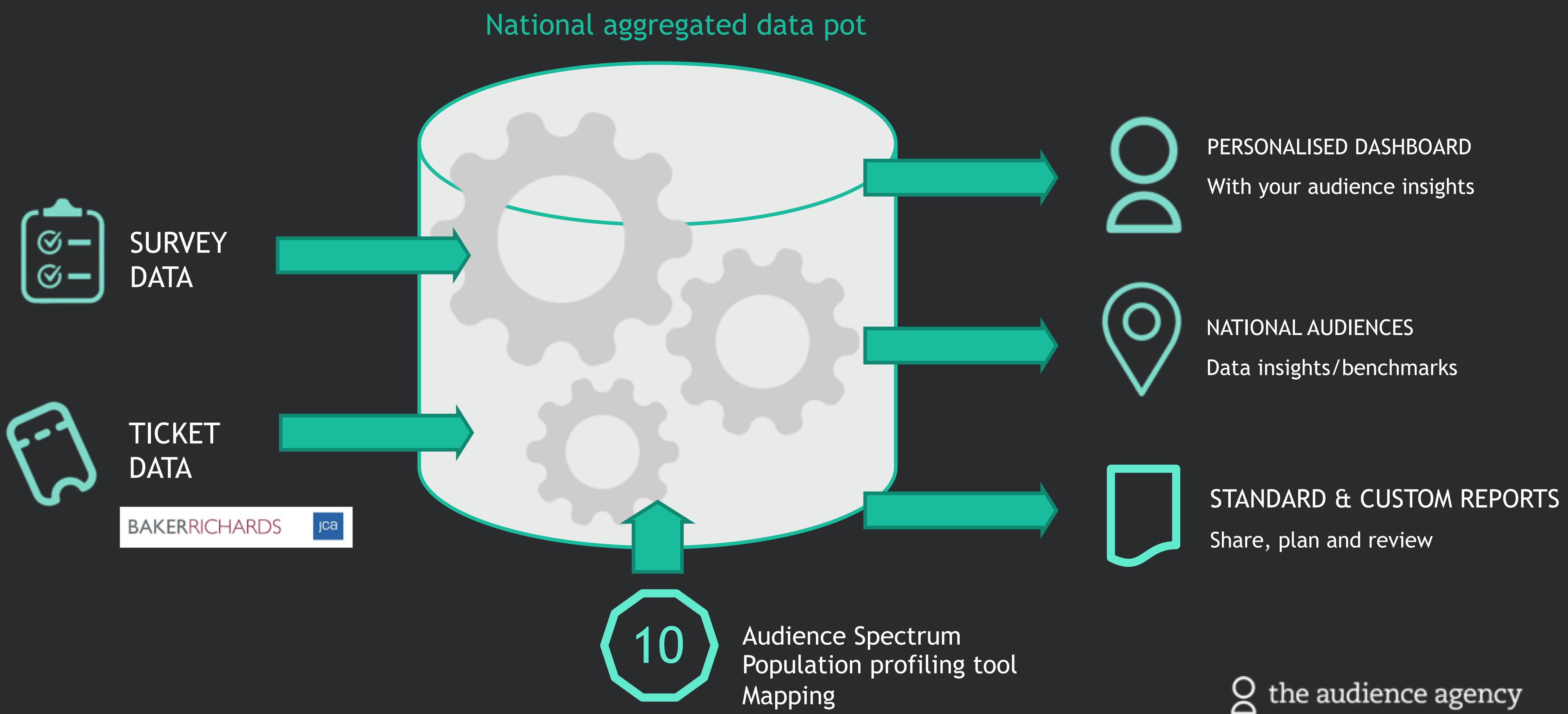
ARTS COUNCIL ENGLAND

audience finder

- Data sharing across 1,000 UK cultural organisations
- 19 million (/26m) households tracked
- 750,000 post-experience survey responses
- 10,000 registered professional users
- New survey of digital content users
- Being trialled with 3 international partners

audience finder

How it works – the technical bit



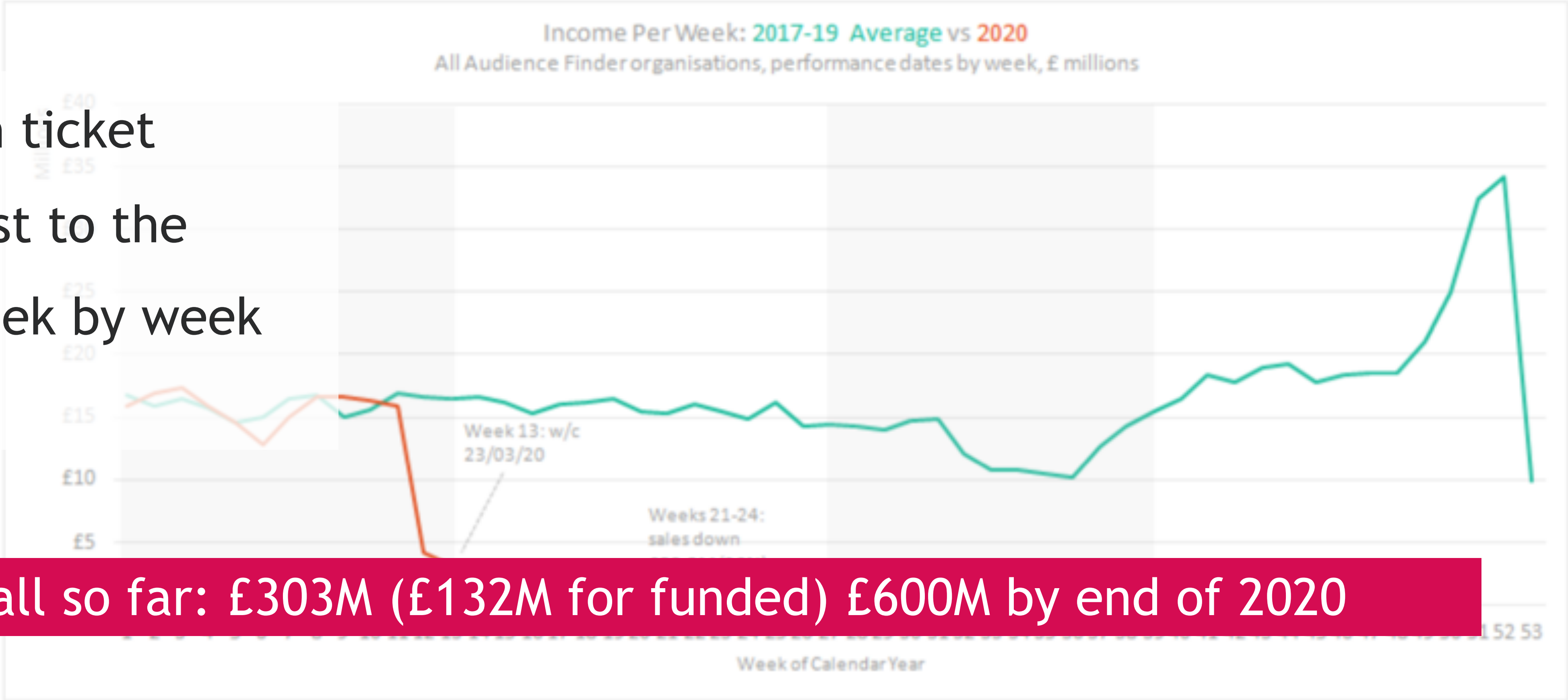
audience spectrum

A population segmentation using multiple data sources based specifically on arts and cultural interests:

All UK households and all “Audience Finder” arts data

Audience Finder Stats: Ghost Light Report

How much ticket income lost to the sector, week by week



Shortfall so far: £303M (£132M for funded) £600M by end of 2020

Audience Finder Stats: Interactive Dashboard

Which audiences,

artforms and regions

worst affected

Different impacts as closures continue:

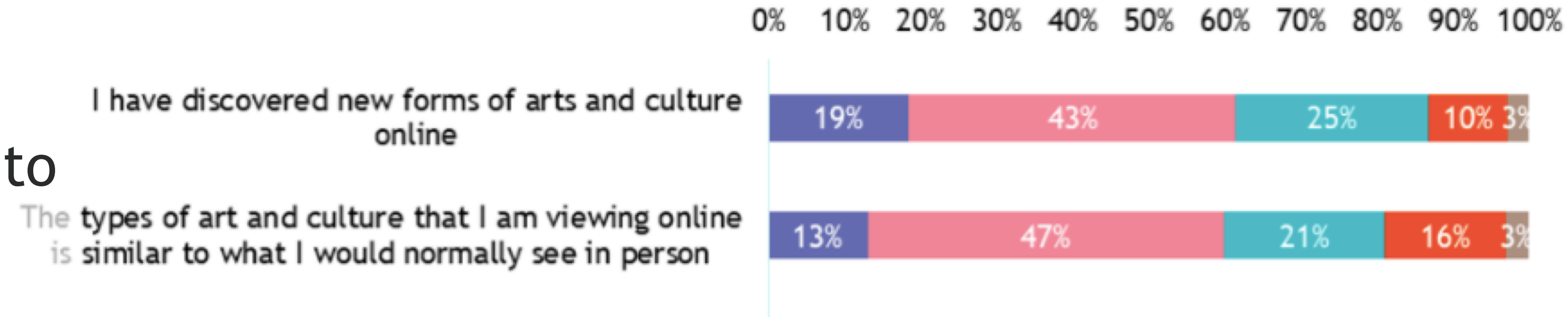
Autumn: drama audiences and highly engaged audiences

Christmas: popular seasonal product – low engaged audiences

Spring: dance/ contemporary product – younger audiences

The Digital Survey & Analysis

How audiences are responding to digital content



Older core audiences are the majority

Increases in younger audiences – 100% increase

Large "non-attender" audiences – 75% never visited the physical venue

Increases in disabled audiences

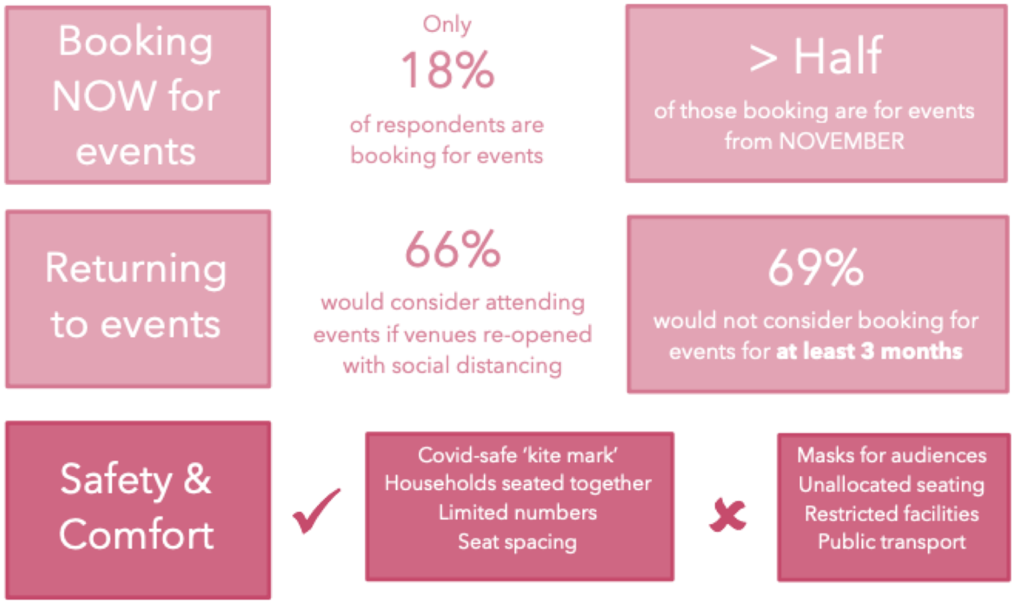
Mixed responses but people trying new things

Audience Intentions Surveys

Predict

immediate

market change



Skew to super-attenders

Focus on confidence and social distancing, payment and donation

Reliable/ meaningful data? No focus on broader issues of wellbeing

Digital Audiences Survey: theaudienceagency.org/bounce-forwards-evidence-hub-2

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Impact of Covid-19 project

We're leading a national research project exploring the impacts of Covid-19 on the cultural sector across the UK and highlighting the implications for policy making.

Delivered in collaboration with the Creative Industries Policy and Evidence Centre (PEC) and The Audience Agency, the project runs between September 2020 and November 2021.

culturalvalue.org.uk/our-work/covid-19-research-project

COVID-19 Cultural Engagement UK Population: Sneak Preview

How the population's behaviour is changing ref cultural engagement

- Full sample
- Longitudinal

Drastic decreases in institutional engagement

People staying very local (4km)

Happy with social distancing measures

57% say they think they will do less than they used to

Population monitor: theaudienceagency.org/bounce-forwards-evidence-hub-2

How are audience behaviours changing?

Older Audiences…

Commuterland
Culturebuffs

Older Audiences....

- Are the core of most performing arts audiences – not being replenished
- Limited social distancing is a factor
- Small majority - 60% consider returning
- Significant majority will not consider returning?
- Enthusiastic digital audiences – but concerned about quality
- Digital payment models not currently effective
- Big interest in “quality brand” digital experiences

Younger Audiences...

Younger Audiences: Experience Seekers

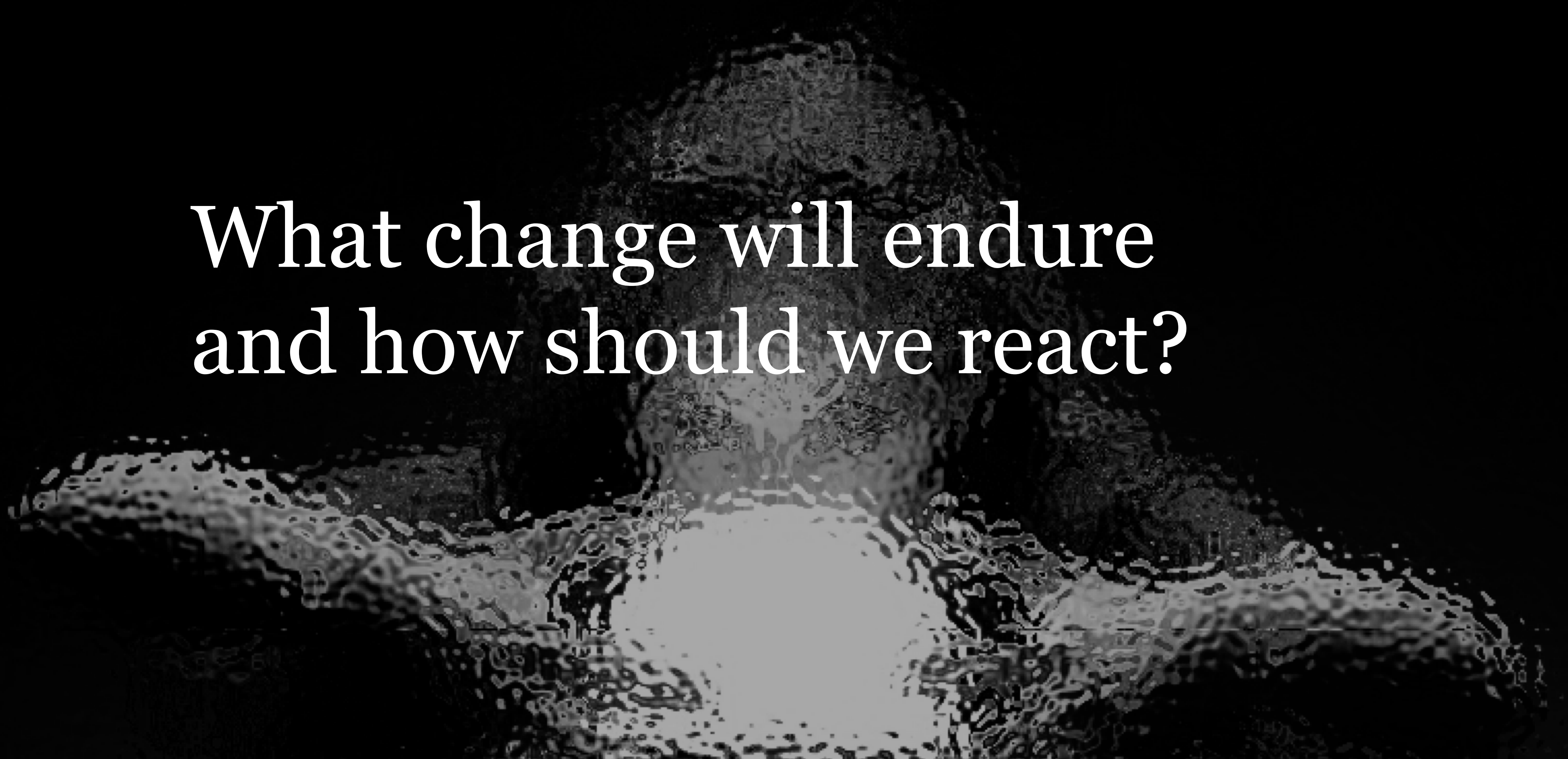
- Urban hipsters and millennials, keen to regain social life
- Visual arts, film, alt cabaret, hybrid - Lates etc
- Younger groups – anxious, wanting to stay connected online
- Personal creativity may have featured large in lockdown
- Indulged in niche digital – social, podcasts, “hidden artists” –
- Also Black Lives Matter as a focus
- Hit hard by economic downturn and unemployment - unprecedented price-sensitivity
- Compliant but put off by social distancing - too much planning/ lack atmosphere
- Interest in digital first/ blended models

Digital Audiences...

Digital audiences

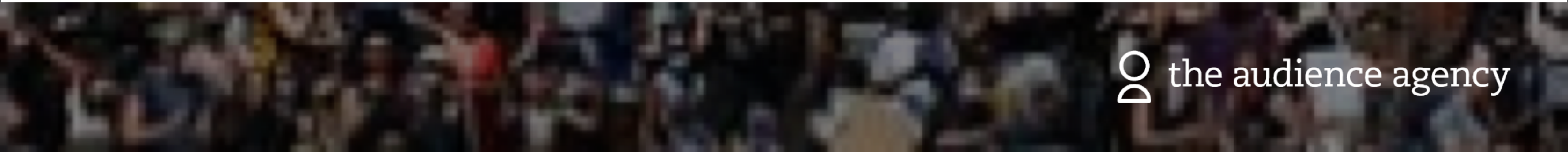
- 38% audiences tried digital content for the first time
- 86% core audiences are potential consumers of digital content
- Online content expected to be enjoyable, different but inferior to live
- Digital-first content is of particular interest
- “On demand” is a key factor
- There are substantial differences in engagement, interests and tastes
- 12% had paid for experiences (less when optional)
- Significant variations between needs and prefs of older and younger audiences
- Digital has increased some forms of access

What change will endure and how should we react?



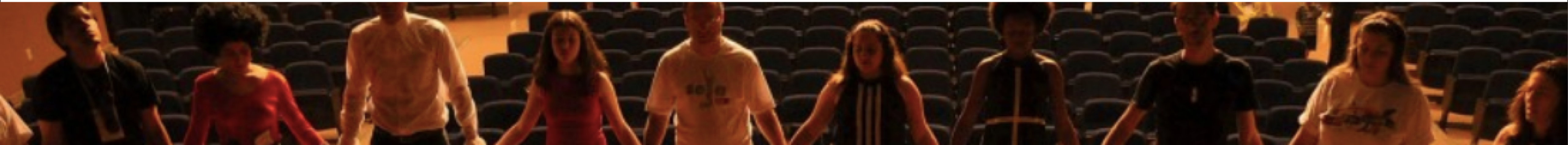
Enduring Change? Audiences

- 60% say engagement in formal culture *“important to their wellbeing”*
- “social connection” and “personal creativity” increase as drivers?
- Digital engagement here to stay?
- Decline in traditional-classical audiences accelerated?
- Engaging locally, being part of a community?
- Gap between haves and have-nots widening



Enduring Change? Organisational behaviour

- Closure/ failure of significant % – winners and losers?
- More experimental?
- Increased interest in data/ evidence?
- Increased confidence in digital as a channel/ medium?
- New forms and formats?
- A new role in the community/ place – wellbeing / agents of change
- Accelerates policies cultural democracy and creativity-led regeneration



Rethink? Redistribute

- Accept decline in traditional performing arts
- Well-organised “mutualised” digital subscription major part of business model
- Blended and highly differentiated digital-live offer
- On demand?
- Reapply funding and professional effort in new different artforms and spaces…
- Participatory, immersive, interactive, cross-artform/experience
- Incentivise more innovation behaviours (digitally-enabled) audience centred design and experimentation
- Respond to new needs for meaning and community: homeworking, personal creativity
- More public arts funding directed to enabling personal and community distribution

Thank you

Please get in touch:

Theaudienceagency.org/newsletters
Culturalvalue.org

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