

# **AFTER THE INTERVAL:** COVID-19 UK Audience Impact Survey

*April Snapshot*



MAY 2020

*indigo*

**Culture  
Counts**



# After the Interval - Phase 1 Results Breakdown



On 16 April 2020, *Indigo-Ltd* and 192 cultural organisations distributed a COVID-19 audience survey in the UK, capturing over 86k responses. In partnership with *Indigo-Ltd*, Culture Counts ran statistical analysis on the big data captured to offer a breakdown of organisations can use this data. We hope that this analysis will complement the initial analysis and other research happening in the sector.

We recommend looking at the original report available from Indigo-Ltd.

## Headline Survey Results

86,524

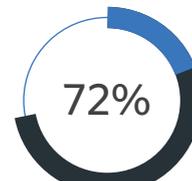
Respondents

93%

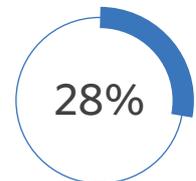
Are missing events



Expect to return immediately



Expect to return (+53% when safe)



Expect to stay away longer

## Analysis Findings

After running a factor analysis of the data collected in the After the Interval survey, we found:

- **Age, employment status and artform type** are **very small factors** in determining whether someone will attend future events.
- The **type of venue** someone is comfortable in returning to is heavily influenced by how much **they expect to follow public advice**. Open areas and seated venues appear to be the most popular.
- **Regularly attendees are the most likely to return** because they are missing events the most. Infrequent attendees are missing events significantly less and more likely to stay away longer.

*More details of the analysis are provided in the methodology section.*

## What are audiences thinking?

One of the toughest challenges for organisations to plan for is the demand for their services in a post-COVID-19 world as we all try to progressively return to normal life. The diversity of the cultural sector and of its audiences mean that when thinking about audience behaviour, we believe that unique insight is derived from the differences found in survey results.

## Factor Analysis

*Overall Factor Analysis: What factors have the strongest influence on how respondents answered?*

The following matrix maps the 'effect size' caused by every factor in the survey, compared to the question being asked. The bigger the number, the more difference we see in the results.

QUESTION	AGE	COMFORT TO RETURN	EMPLOYMENT	LOCATION	MISSING EVENTS	ORG TYPE	ATTENDANCE FREQUENCY	VULNERABILITY
How flexible presenters need to be considering ticket booking	0.02	0.00	0.01	0.01	0.00	0.01	0.01	0.00
How comfortable are audiences in returning	0.05		0.06	0.03	0.10	0.02	0.03	0.14
How much someone misses attending events	0.04	0.10	0.03	0.08		0.07	0.29	0.01
If audiences are still interested in philanthropy, given the economic shock of COVID	0.04	0.01	0.03	0.03	0.01	0.02	0.01	0.01
If audiences would like organisations to focus on particularly initiatives post-COVID	0.02	0.03	0.02	0.15	0.01	0.05	0.03	0.02
If decisions to attend are effected by venue type	0.03	0.41	0.03	0.01	0.02	0.00	0.00	0.07
What can presenters do to promote or encourage attendance	0.02	0.04	0.02	0.01	0.01	0.01	0.01	0.03
Why audiences want to attend events in the future	0.04	0.02	0.03	0.11	0.04	0.09	0.04	0.03
Vulnerability	0.28	0.14	0.25	0.05	0.01	0.05	0.01	

Which factors are the most significant (vertical) and which questions see the most change (horizontal). Cells represent Effect Size (Eta Squared for One-Way ANOVA [Row 1 & 6] and Cramer's V for Chi-Squared Categorical). Coloured by respective effect size guidance from Draper (2002); Small, Medium or Large.

## What Results Matter?

All survey responses matter, however when using data to plan and make decisions the question is a statistical one - are the aggregate results representative of my audience? The factor analysis tells us where the differences are in the aggregate results and where to find them.

For example, a math class might get an average of 80/100 for a test but the factor analysis tells us there is a big difference caused by gender. We investigate to discover the average for boys was 70/100 and the average for girls was 90/100. This means that if an entirely different class does the same test, we will expect the overall average score to change based on the ratio of boys to girls in that class. More boys means the average score is lower; more girls means the average score is higher. It is the same for audiences. For some questions, the results are broadly the same for all audiences. However for others we see some bigger differences.

This analysis showed three medium or large differences:

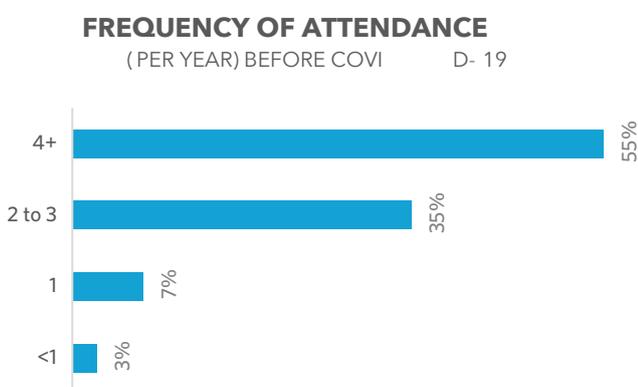
- Someone missing attending events, based on how frequently they attended events before.
- The types of venues people will be comfortable in returning to, based on how comfortable they are in returning to normal life after COVID-19.
- Vulnerability effects comfort to return and older audiences are more likelihood to be vulnerable to COVID-19, but age does not significantly affect someone decision to attend events in the future.

## Regular Attendees

The survey collected the majority of responses from those that would be considered as frequent attendees. Generally this is not a problem when analysing survey results, as the factor analysis shows. It did cause a significant difference in the results of one question in the survey regarding how much attendees missed events.

The implications of this problem are explored further in the **Selection Bias** section.

### Frequency of Attendance (Per Year) Before COVID-19



Source: Indigo, 2020. n = 86,524

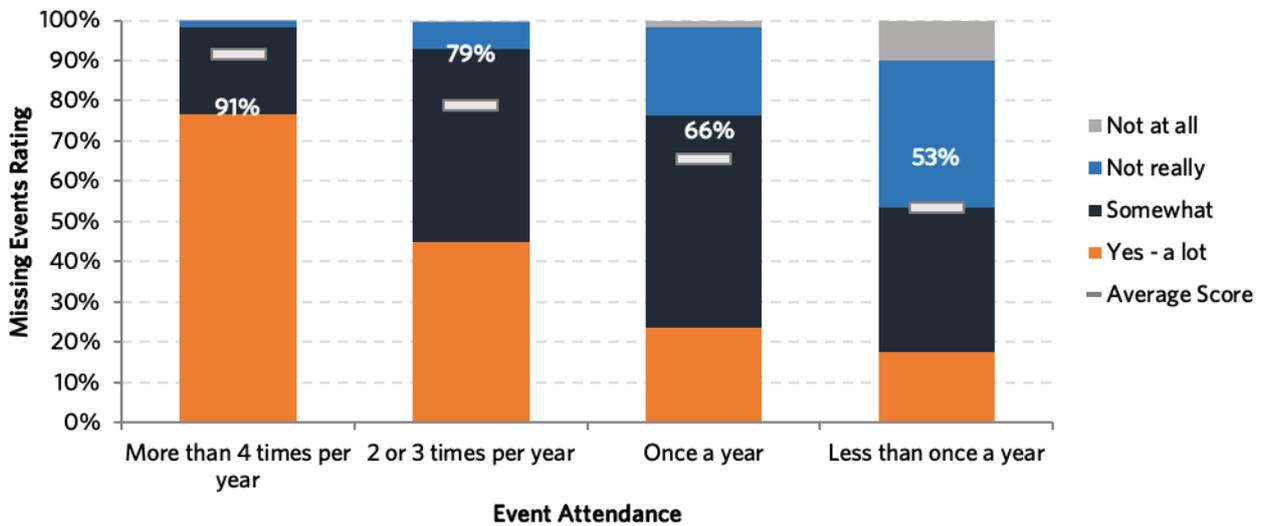
### "Are you missing the opportunity to attend live events at the moment?"

Yes - a lot	60%
Somewhat	33%
Not really	6%
Not at all	1%

Source: Indigo, 2020. n = 86,524

Those that attended events - frequently miss them the most. Those that attend infrequently - miss events significantly less. This is important because for many organisations, as a large selection of their audience are considered 'single ticket buyers'. It still appears that infrequent attendees miss events at a 50/50 split.

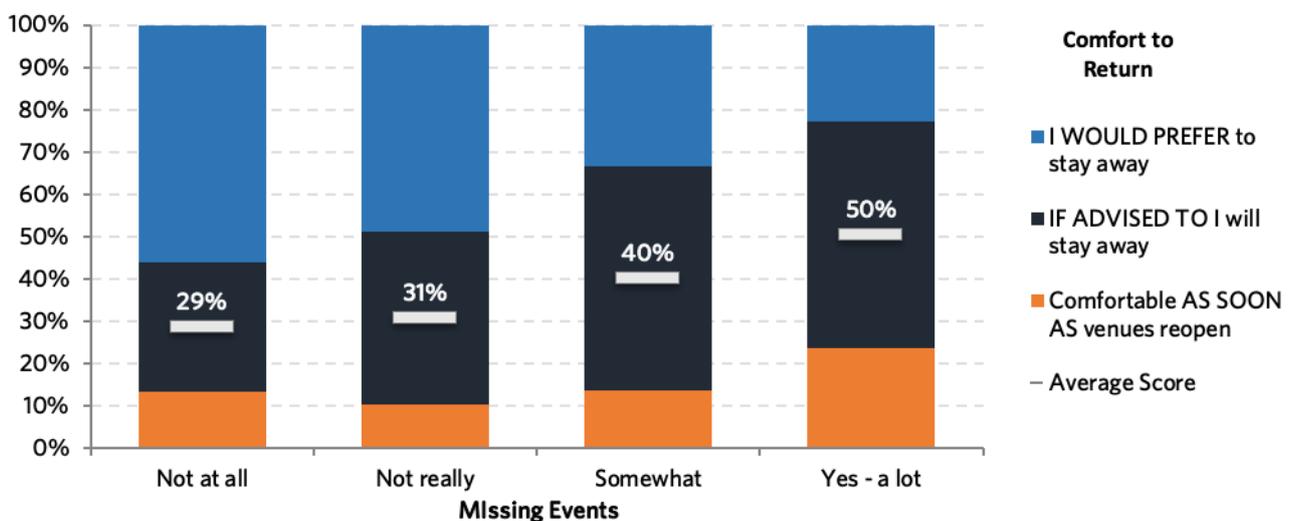
**"Are you missing the opportunity to attend such events at the moment?" split by "Comfort to Return"**



Missing Events results have had a score applied to them for comparative purposes; 'Not at all' = 0%, 'Not Really' = 33%, 'Somewhat' = 66% and 'Yes - a lot' = 100%.

The question then follows if missing events effects someone's comfort to return. A cross tabulation of audiences that miss events by their comfort to return found that those that do not miss events are likely to stay away longer. The analysis determined this to be a small effect, likely because of the small promotion of attendees that did not miss events (approximately 7%). For this reason, it is uncertain if this result represents the entirety of the audience, and will likely have larger implications for organisations with a high proportion of audiences that infrequently engage with arts events.

**"Are you missing the opportunity to attend such events at the moment?" split by "Comfort to Return"**



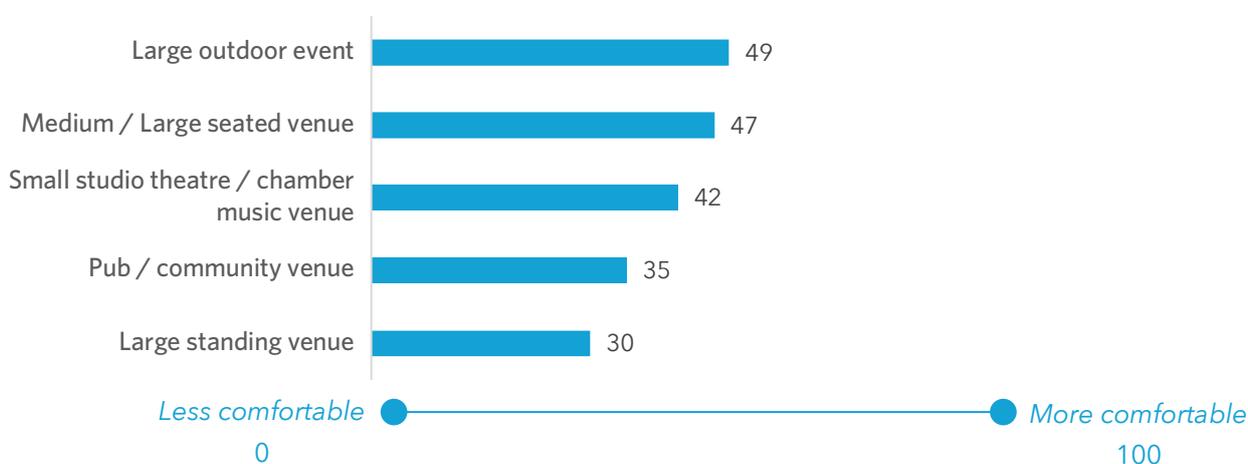
Score applied to 'comfort to return' for comparative purposes; 'Prefer to stay away' = 0%, 'If advises to' = 50%, 'As soon as' = 100%.

## Venue Type

Respondents were asked to rate how comfortable they would be to return to events, based on five different venue types. They using a continuous slider to input their results. When averaged, no venue performed positively. However, when the results were split by how comfortable someone was to return in general, the scores varied significantly.

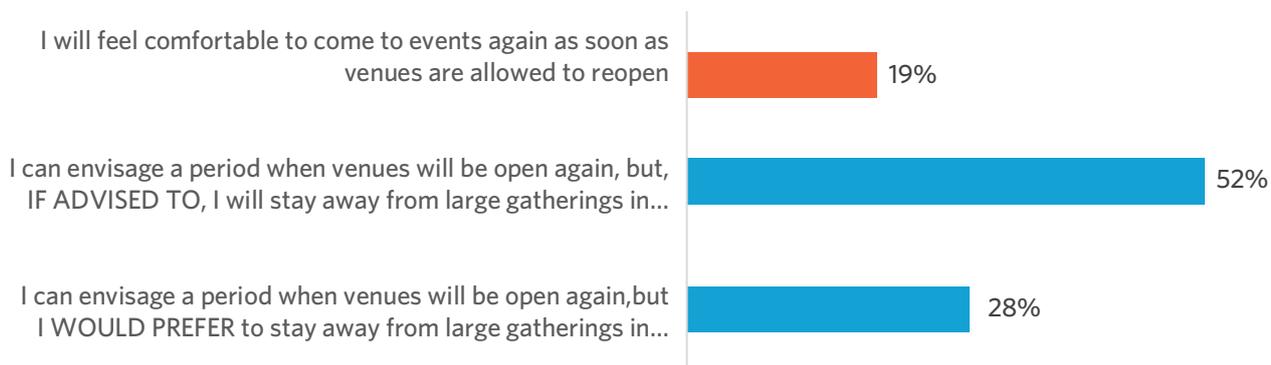
This revealed that comfort to return has a large effect on the score an individual gave to a venue type, however generally all scores followed this average trend of placing large outdoor areas and seated venues as the most popular.

### “Are there certain types of venues that you would feel happier coming back to before others?”



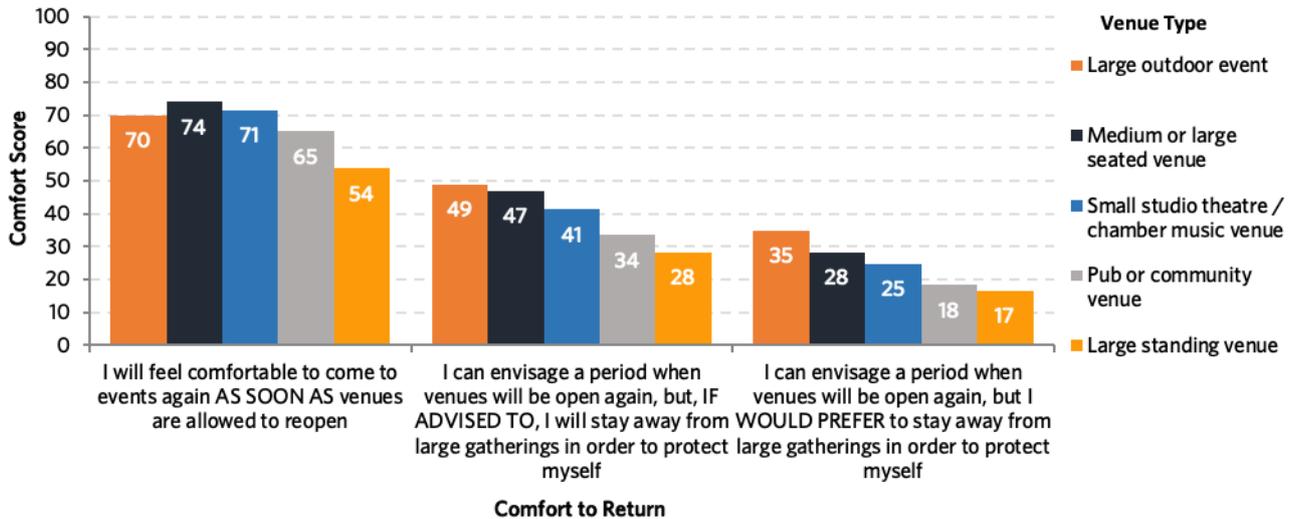
Source: Indigo, 2020. n=62,952

### “Which of the following statements best fits how you’re currently feeling about the possibility of coming out to events at a venue again?”



Source: Indigo, 2020. n=69,251

Venue 'comfortability to return' results (101-point scale) split by 'possibility of returning in the future'.

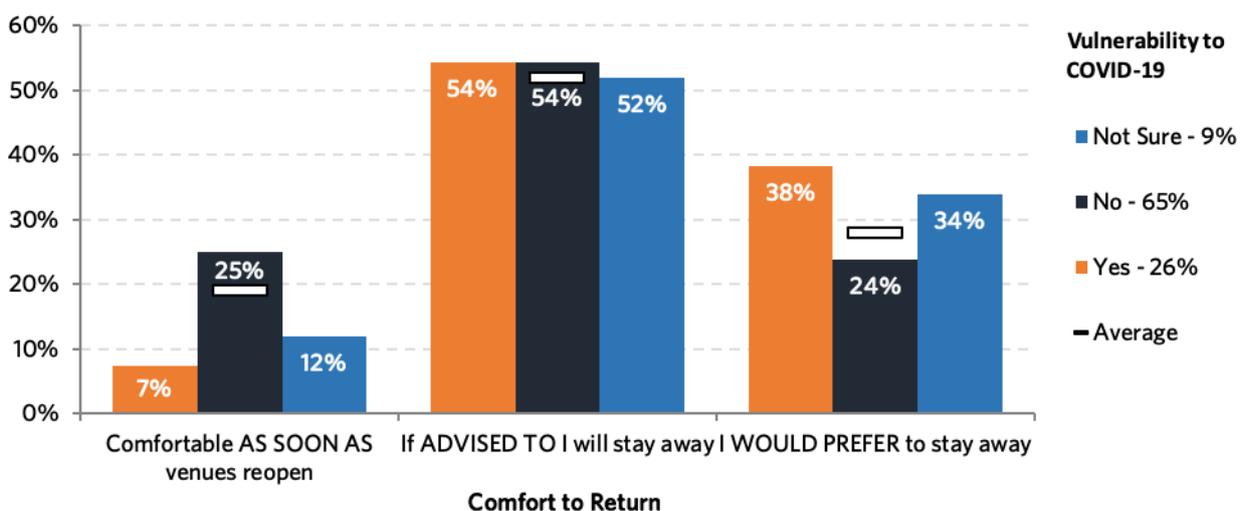


## Vulnerability to COVID-19

Age and artform type have negligible effect sizes on respondents' comfort to return, however vulnerability does have a small effect on someone's comfort to return.

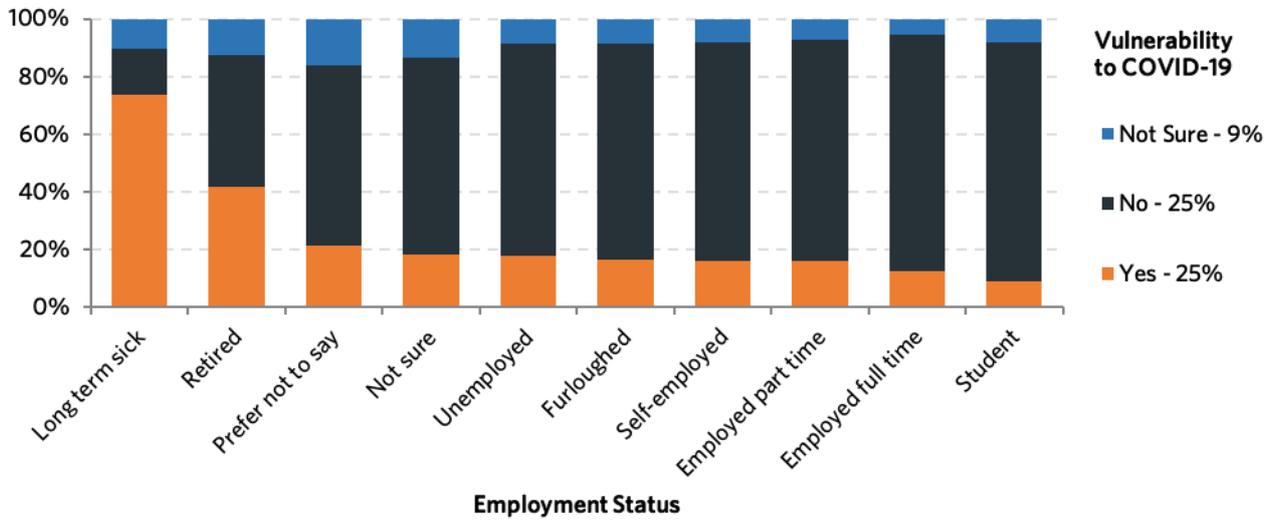
Regarding 'comfort to return', most respondents will follow public advice regardless of their vulnerability to COVID-19. The difference is predominately in the groups that are either comfortable to return now or plan to stay away longer. Those that are comfortable to return now are more likely to not identify as vulnerable, whereas those that are likely to stay away longer do identify as vulnerable.

'Comfort to return' split by 'vulnerability to COVID-19'. 65

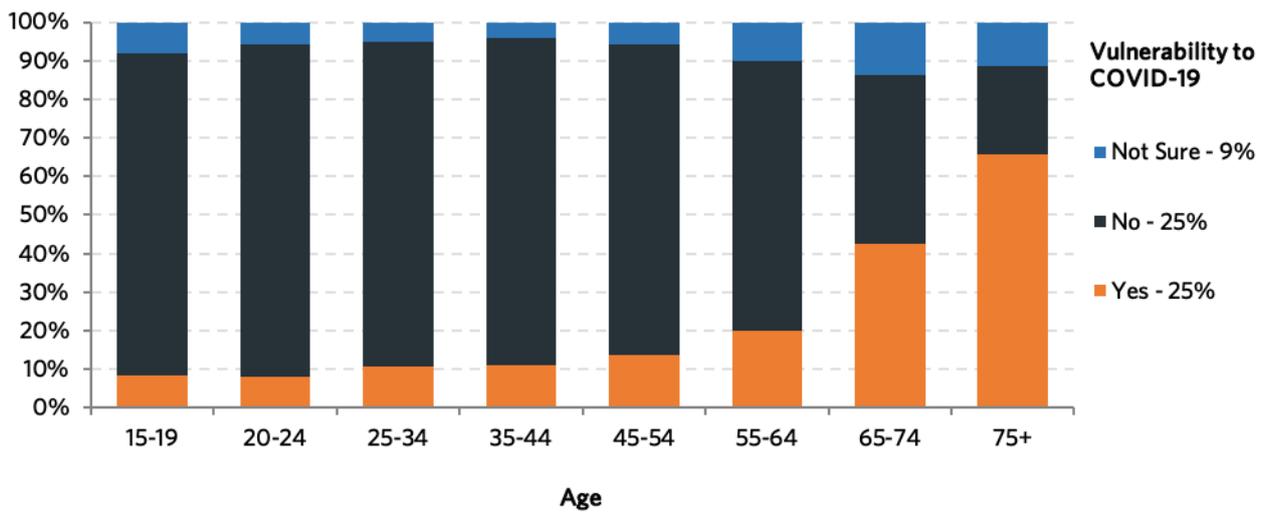


When looking at vulnerability, the factors of age and employment status do have medium effects on whether someone identifies as vulnerable or not. Older respondents are more likely to identify as vulnerable to COVID-19, as are those who have long-term sickness or are retired. However, because of the significant portion of respondents who plan to follow government advice, these effects only translate into a small effect on comfort to return by age, with most respondent age brackets reporting similar results.

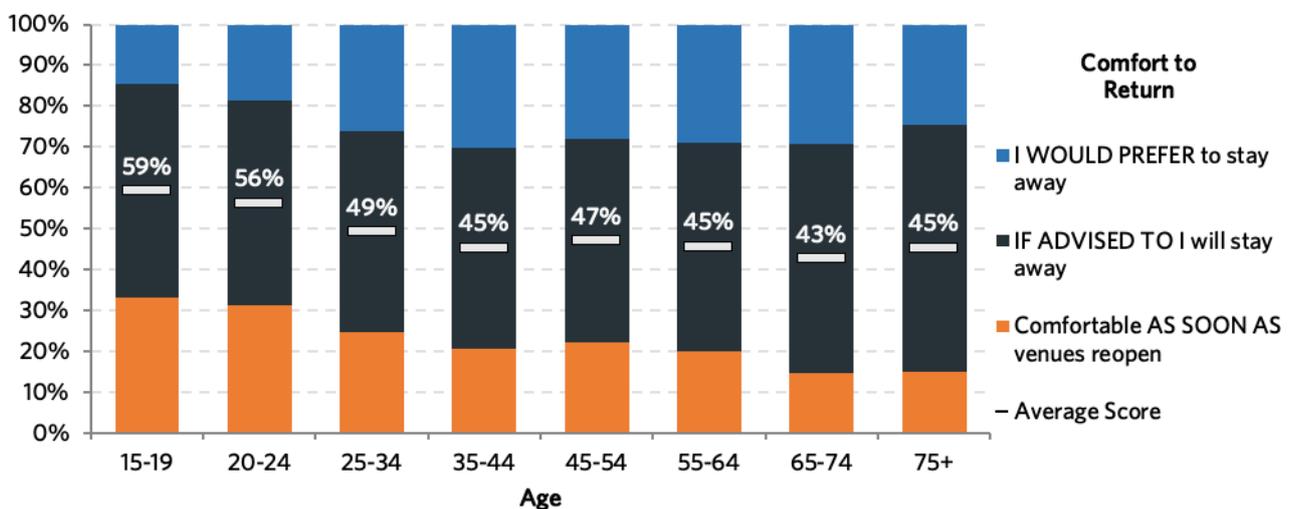
**Employment type split by 'vulnerability to COVID-19'.**



**Age by 'vulnerability to COVID-19'.**



**"Comfort to return" split by age.**



Score applied to 'comfort to return' for comparative purposes; 'Prefer to stay away' = 0%, 'If advised to' = 50%, 'As soon as' = 100%.

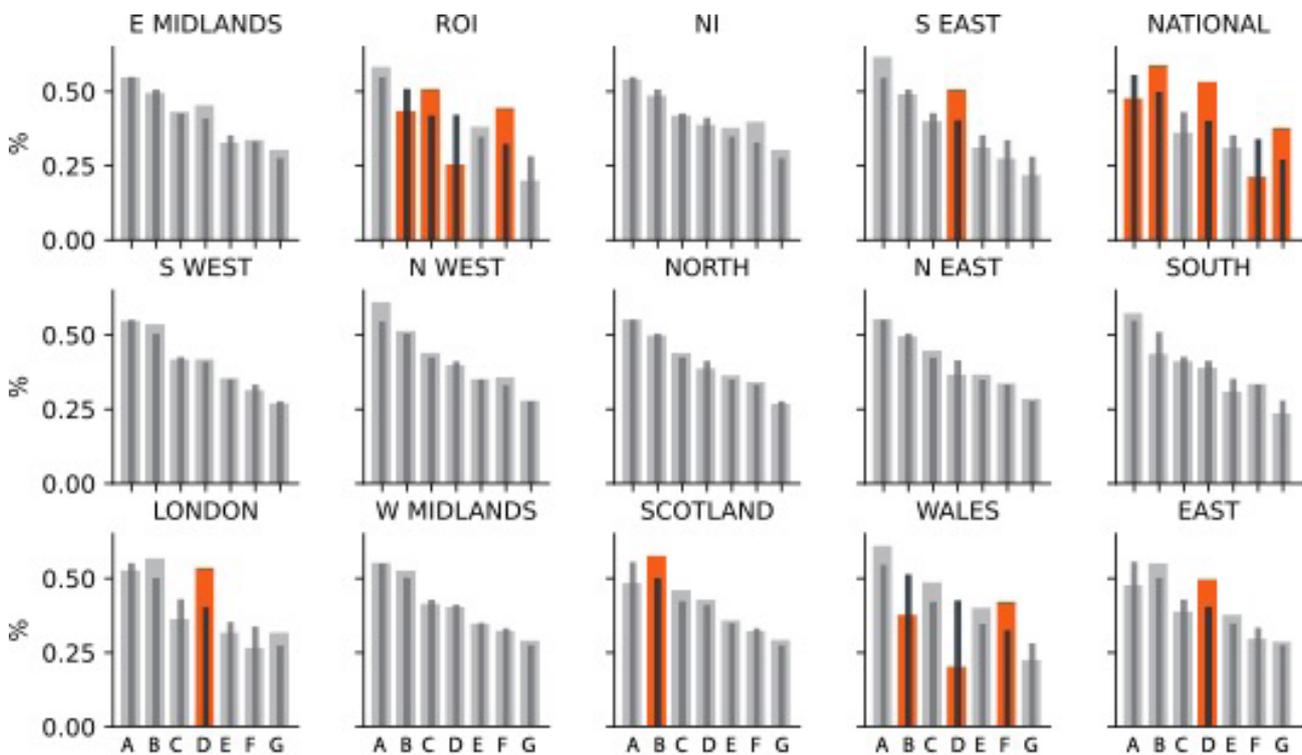
## Other Factors

Generally speaking, the effect size of the other factors considered was relatively small or insignificant. If these were the only factors that were important in determining someone’s response (which may not be the case), given the small effect sizes, this helps us to be confident in using the overall results for planning and decision making. For example, when splitting results for respondents that are interested in particular initiatives split by region, we believe there is less value for most organisations to consider the differences in the result, however there will be notable exceptions.

Regarding support for particular initiatives by region, most respondents follow the overall average and trends for all the options. There are a few example of regions that deviate from the norm, particularly responses for national organisations and those based in the Republic of Ireland.

This is visualised below. The large bars represent the regional average response. Black bars represent that overall average response. Orange bars represent results of significant difference.

### ‘Which of the following initiatives would you feel most affinity with supporting, if you were financially able’ split by Region of Organisation.



- Celebrating Health and Care workers who have put themselves at risk in treating Covid-19 patients - A
- Enabling people who can't now afford to come to access tickets - B
- Enabling 'vulnerable' people to bring a friend when they feel able to return to the venue safely - C
- Bringing culture to more people via digital channels - D
- Celebrating interaction between people of all ages - E
- Health and Wellbeing - F
- Education and skills development - G

## Selection Bias

Generally when we see factorial differences like these, we apply a 'weighting' to the results to come up with an overall result that is representative of an entire population. A major difficulty we find with post-hoc surveys, especially in the cultural sector, is selection bias. As arts attendees tend to be highly engaged, they also tend to be over-represented in survey results. The After the Interval survey deliberately targeted engaged audiences to get an understanding of the scale of impact for organisations. As the factor analysis demonstrates this approach is generally not a problem since engaged attendees do not normally skew the results away from the overall average. The results highlighted here are the exception to that.

This has two implications:

1. The overall results for these questions may not be representative of the general population
2. Organisations should be considered in using these results for their own decision-making

If you want to use this data in your own forward planning, we recommend applying a weight to these results, based on what you think your overall audience looks like. For example, if you take the scores for your venue type (e.g. large outdoor events) and estimate the breakdown of comfortability for your audience, you can determine your individual score. In the below example, the weighted score is 47/100.

(70 x 20% + 49 x 50% + 35 x 30%)

	LARGE OUTDOOR EVENT SCORE	WEIGHT
Comfortable AS SOON AS venues reopen	70 / 100	20%
IF ADVISED TO I will stay away	49 / 100	50%
I WOULD PREFER to stay away	35 / 100	30%
MY RESULT	47	

## Conclusion

The After the Interval survey offers cultural organisations a unique approach in collaborating to understand the complexity and diversity of our audiences and how they are responding in this moment. In combining our resources and sharing information, we are better able to understand what response we can make jointly as a sector and where it is important to differ, based on our respective communities of interest.

As more questions emerge, we will continue to revisit this analysis as we progress through this pandemic.

## Appendix - Methodology

Using the After the Interval survey data provided by Indigo-Ltd, we designed an analysis framework to understand how certain factors influenced the results of the questions being asked.

The primary questions in the survey were

- How much someone misses attending arts events
- Why audiences want to attend events in the future
- How comfortable audiences are in returning
- What can presenters do to promote or encourage attendance
- If peoples decision to attend will be based on the venue type
- How flexible presenters need to be considering ticket booking
- If audiences are still interested in philanthropy, given the economic shock of COVID-19
- If audiences would like organisations to focus on particularly initiatives post-COVID-19
- What percentage of audience believe they are at high risk and vulnerable to the effects of COVID-19

When considering these questions, we consider the following factors to see if they make any difference on the response

- Age
- Employment Status
- Vulnerability to COVID-19
- Regularity of Attendance
- If they miss attending events
- How comfortable they are in returning to events post-COVID-19
- Where the organisations was based (i.e. region)
- What type of arts organisations sent them the survey (i.e. org type)

We generally find in our audience research that everyone's audience is slightly different. When we consider our main questions and the factors that can alter the results we can see where we need to have a diversified response to help our audiences engage with us again.

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*Jordan Gibbs is the Client Director of Culture Counts.*

*Indigo-Ltd conducted the After the Interval survey with cultural organisations in the UK. More information is available at [www.indigo-ltd.com](http://www.indigo-ltd.com). This analysis was conducted by Culture Counts in partnership with Indigo-Ltd.*

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