



Culture Beyond Covid

Insights Into Visual Arts Audiences

October 2020

Photograph of Cultúrlann McAdam Ó Fiaich by Emma Kenny



Back in April, we partnered with [Indigo Ltd](#) to deliver the After the Interval Act 1 and 2 surveys in Northern Ireland and the Republic of Ireland. Designed specifically for ticketed organisations who lost the majority of their income overnight, the aim of the survey was to find out how their audiences felt about returning to arts events, booking tickets, social distancing measures, outdoor events and engaging with and paying for culture online. *(You can download the final reports for [Act 1](#) and [Act 2](#) on our website.)*

After the Interval has provided vital information on audiences for organisations who took part, allowing them to recognise opportunities and plan for reopening as well as informing funders and stakeholders about the trends across NI. The situation, however, remains extremely challenging and difficult to predict. Once again, we see a rise in COVID cases and new restrictions put in place. As the context changes, so do the feelings of audiences.

For this reason, we want to continue our research with audiences, expanding it to more parts of the cultural sector. Our new research project **Culture Beyond Covid** will include ticketed and non-ticketed cultural and heritage organisations, thanks to funding from both Arts Council NI Organisation Emergency Programme and National Lottery Heritage Fund.





How was the research conducted?

The Culture Beyond Covid visual arts survey collected 222 responses across audiences for seven visual arts galleries from across Northern Ireland.

Survey links were created for each gallery, and distributed by the galleries through email and social media channels. Responses were collected between 4th and 28th September.

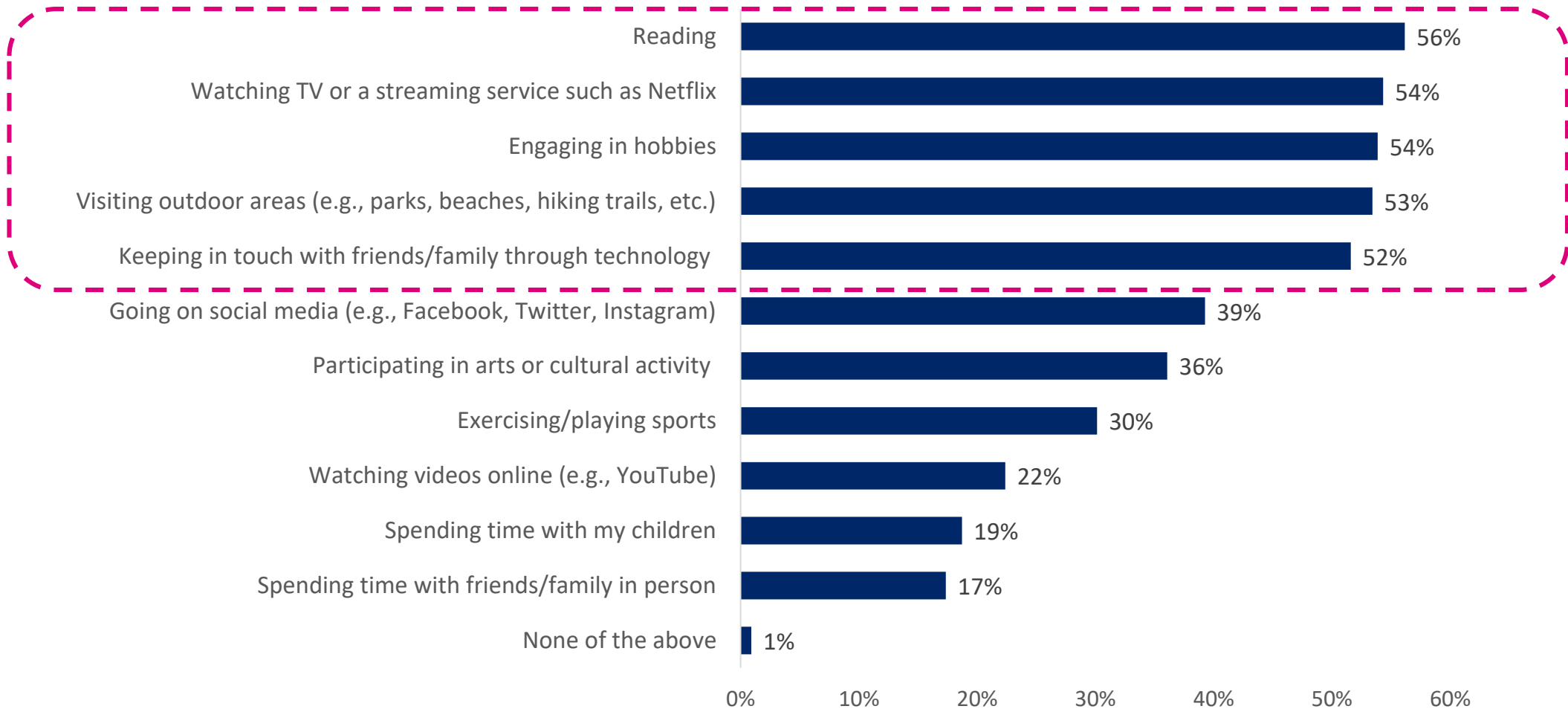
Organisations are welcome to quote data from this survey, however we ask that you credit the Culture Beyond Covid survey from Thrive, funded by the Arts Council of Northern Ireland.

Audience Insights

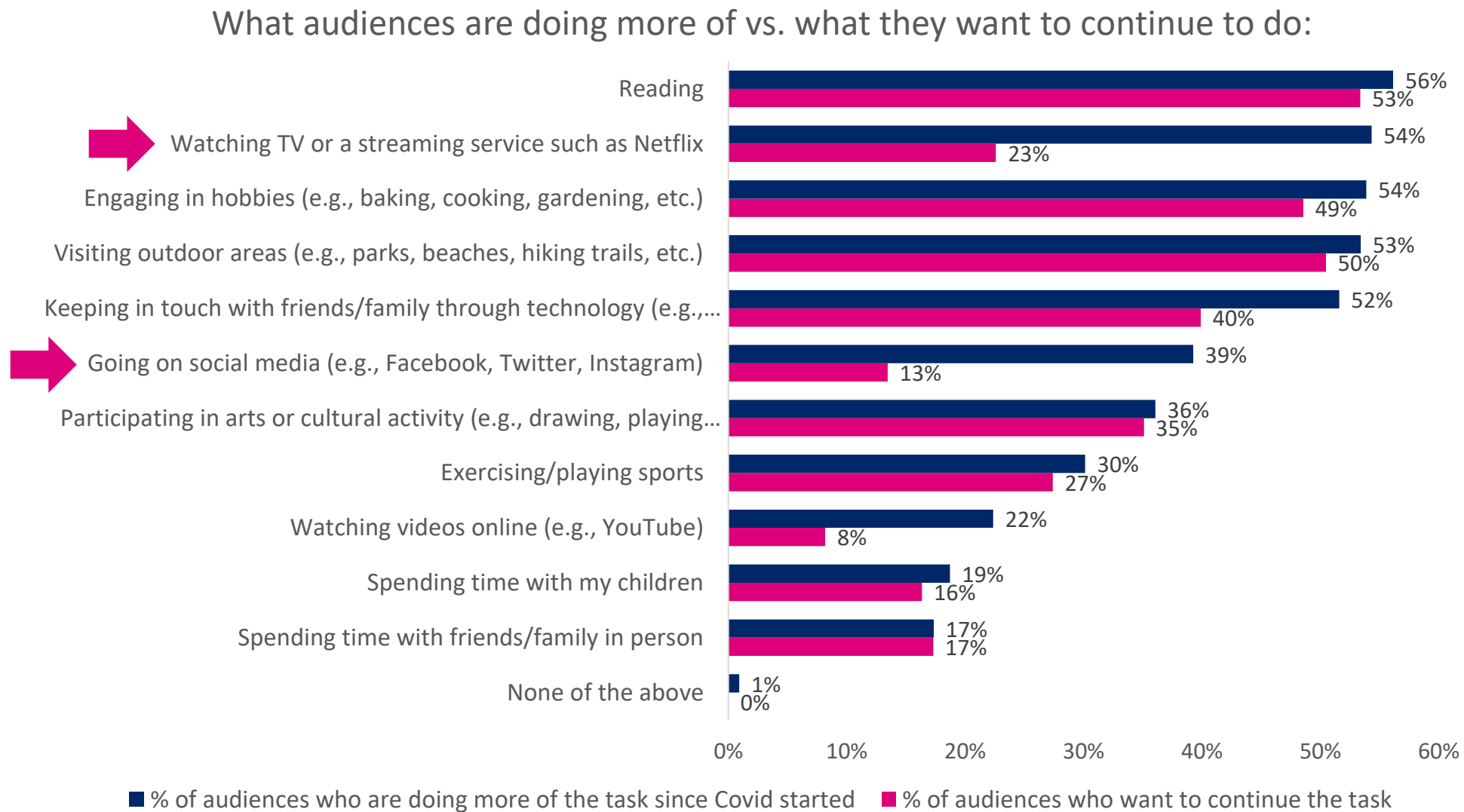
What are people doing more of
since Covid started?

Since Covid started, over half of visual arts audiences surveyed are engaging more in reading, watching TV, engaging in hobbies, going outside, and keeping in touch with others through technology

Which of the following activities are you doing MORE of in your spare time since Covid started?



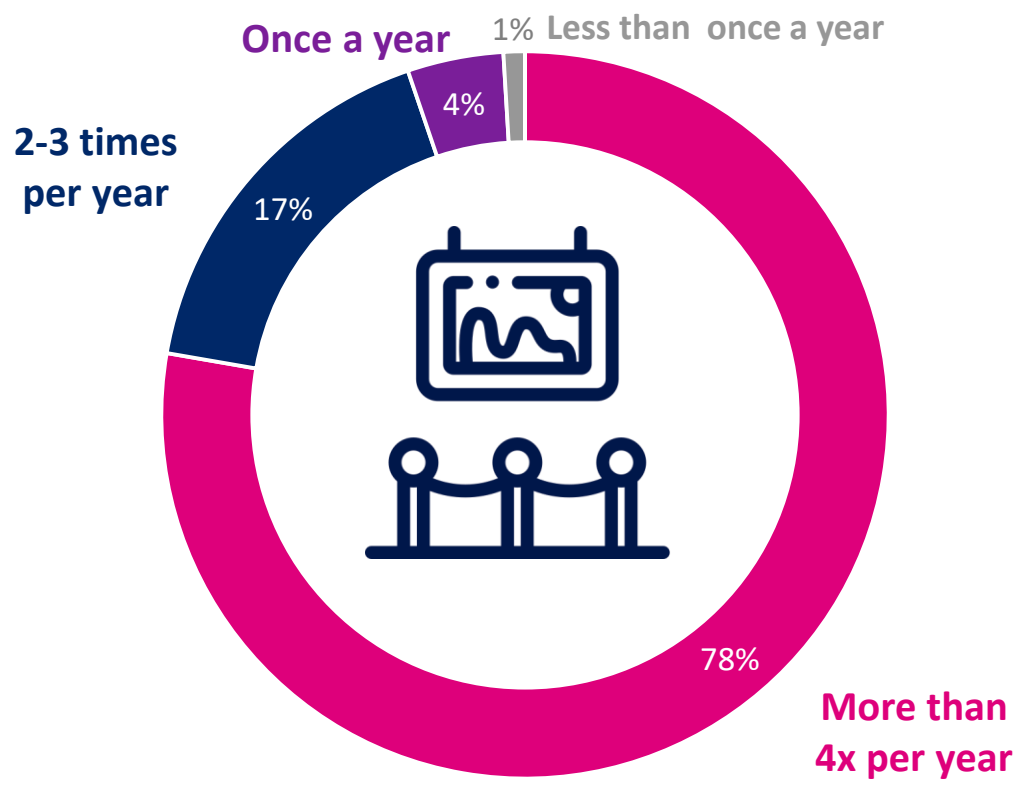
When asked which activities they'd like to CONTINUE to do, the data paints a slightly different picture: less people want to continue watching TV and going on social media



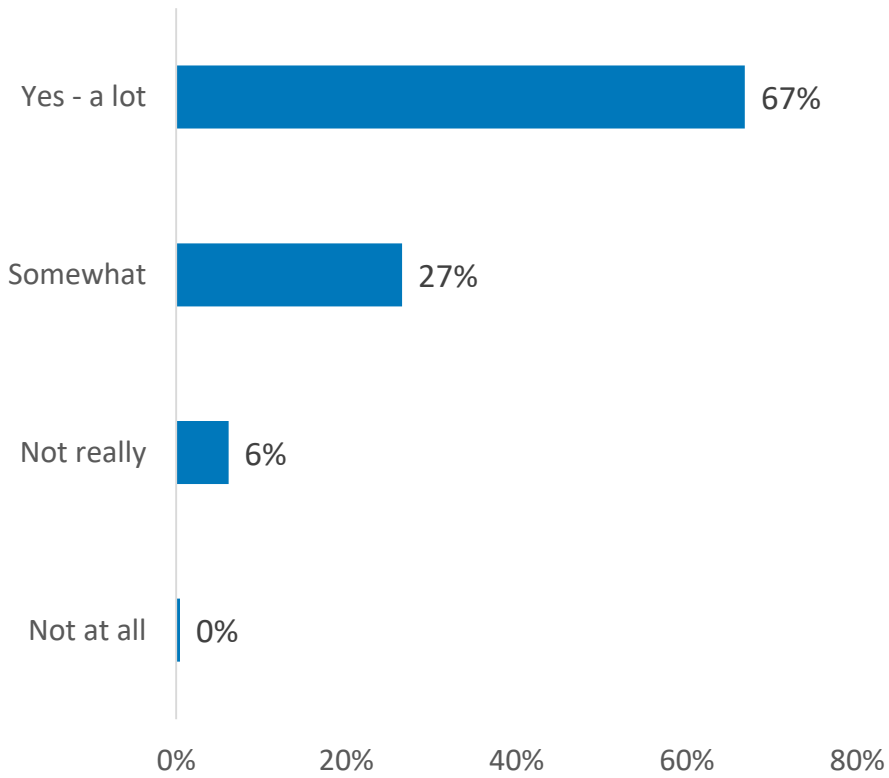
What were audiences' behaviour
like pre-Covid?

Before Covid, visual arts audiences visited galleries frequently – 78% visited more than four times a year. They also miss going to galleries a lot.

How often would you say that you attended galleries before Covid-19?



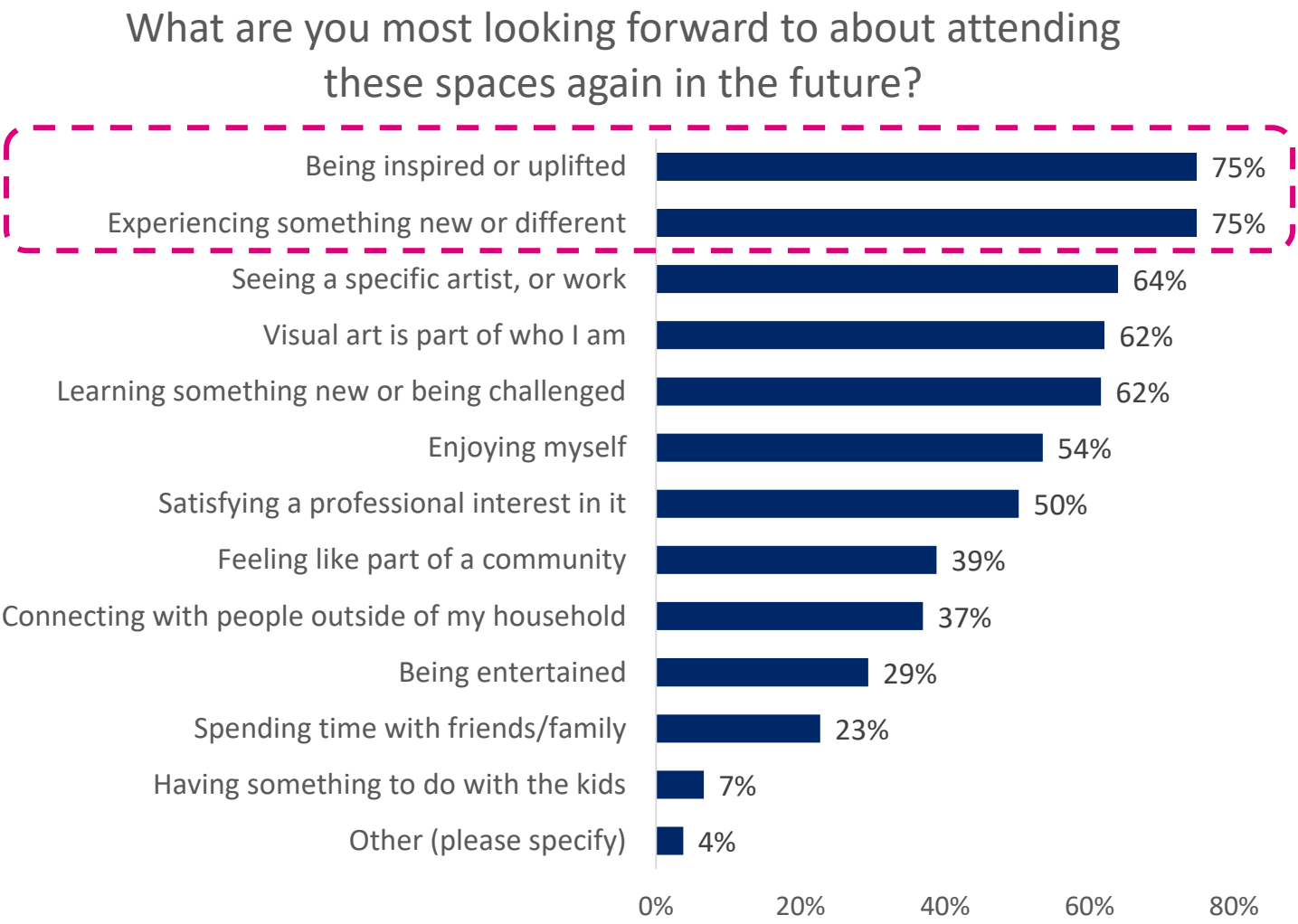
Are you missing the opportunity to attend these spaces at the moment?



Audiences are looking for a positive change of pace – three-quarters look forward to going back to galleries to be inspired/uplifted or to experience something new



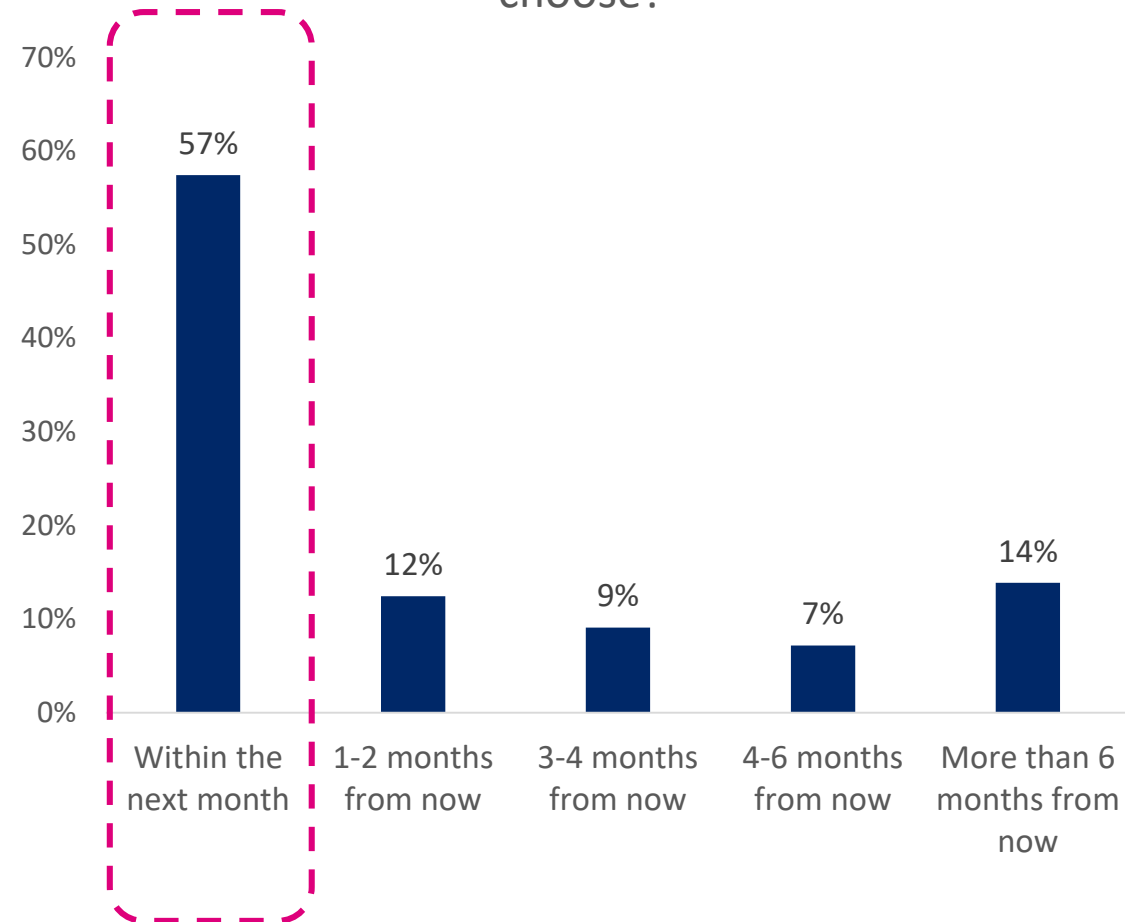
Photograph of Linen Hall Library by Emma Kenny



What are their thoughts about
returning to galleries?

The vast majority of visual arts audiences are ready to go back to galleries within the next month

If you had to say now when you think you'll be ready to start visiting galleries again, which of the options below would you choose?

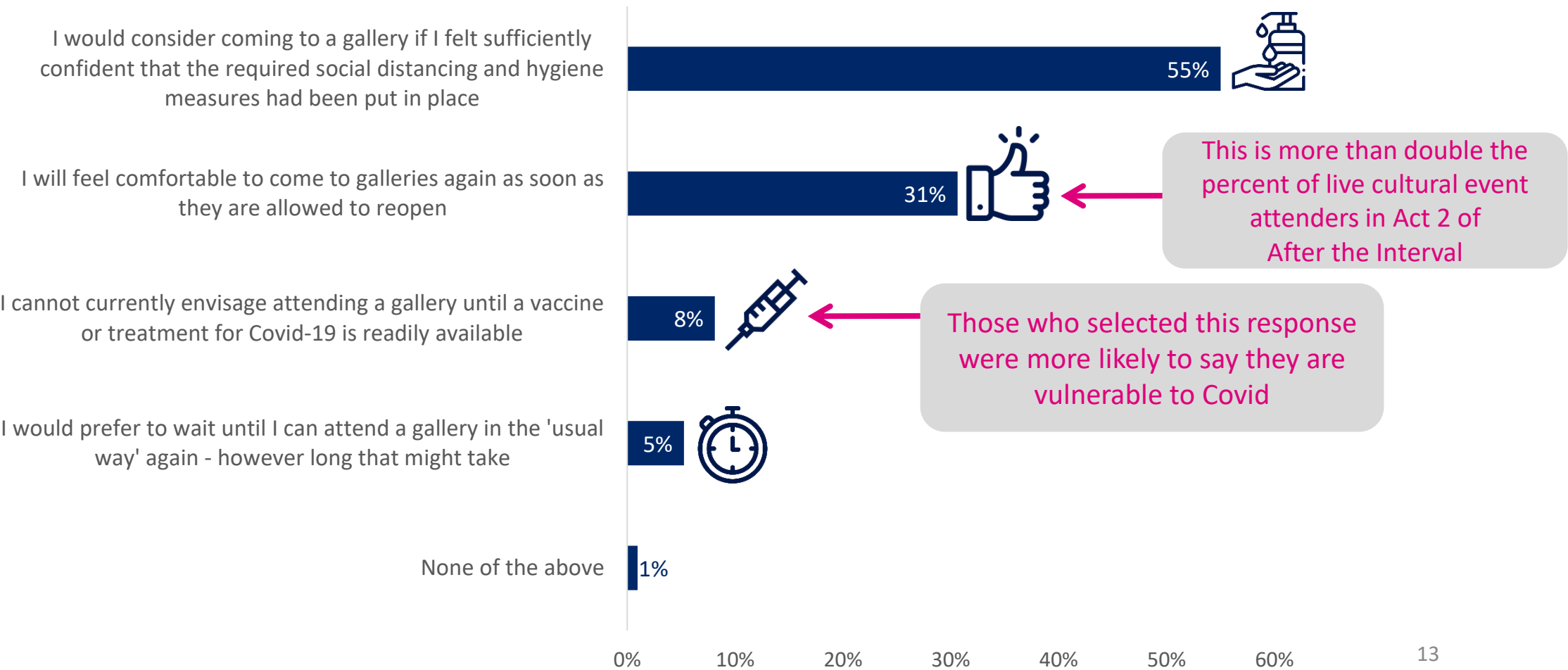


Visual arts audiences are much more eager to go back to galleries:

In After the Interval: Act 2, only 15% of live cultural event attenders expected to book tickets within the next month.

31% of audiences are comfortable coming out to galleries, and a further 55% would feel comfortable once protective measures have been put in place

Please tell us which of the following statements best fits how you're currently feeling about the possibility of coming out to galleries again



What do audiences want to see and do?

Audiences are most likely to attend talks or interviews, opening receptions, small tours, or Late Night Art

How likely are you attend the following activities in a gallery in the next 12 months?
(Tick all that apply)



53%

Artist talks or
interviews



52%

Exhibition
opening
reception



44%

A small,
bookable tour



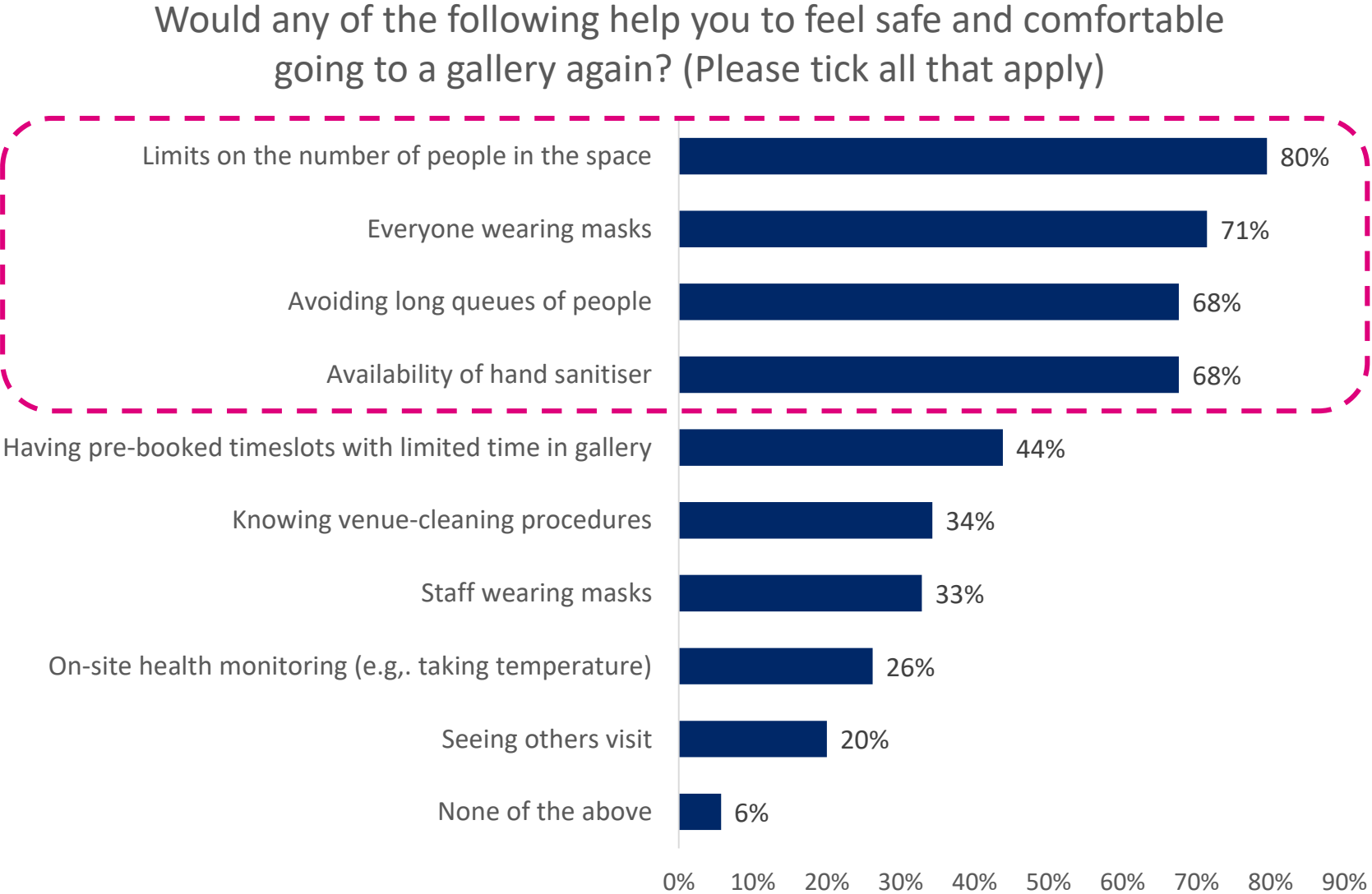
39%

Late Night Art

Additional items mentioned:

- A workshop for adults (23%)
- A workshop for children/families (8%)
- Group tour (12%)
- None of the above (15%)

More than two-thirds of audiences would feel more comfortable going to a gallery if there were limits on attendance, masks worn by all, less queues, and availability of hand sanitiser



Next, we asked audiences what would make them **more** likely to visit a gallery.

The results mirrored that of live cultural event attenders in After the Interval: Act 2.

Hygiene:



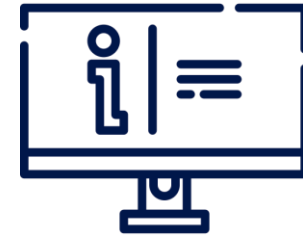
Audiences want **MORE** of this:



Availability of
hand sanitiser



A 'kite mark' for venues
who adhere to a clear
set of standards



Seeing venue
cleaning
procedures



Audiences want **LESS** of this:



Restrictions on toilet
facilities



No handouts/information
available

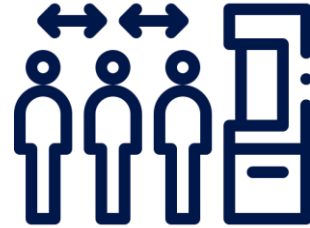
Avoiding
contact with
people:



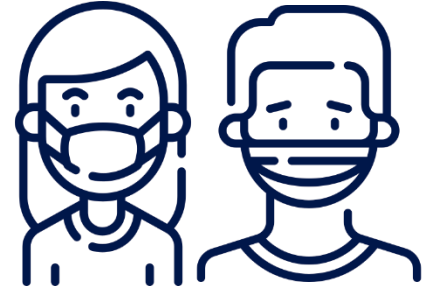
Audiences want **MORE** of this:



All visitors required
to wear masks



Queue
management



Staff wearing masks



Audiences want **LESS** of this:



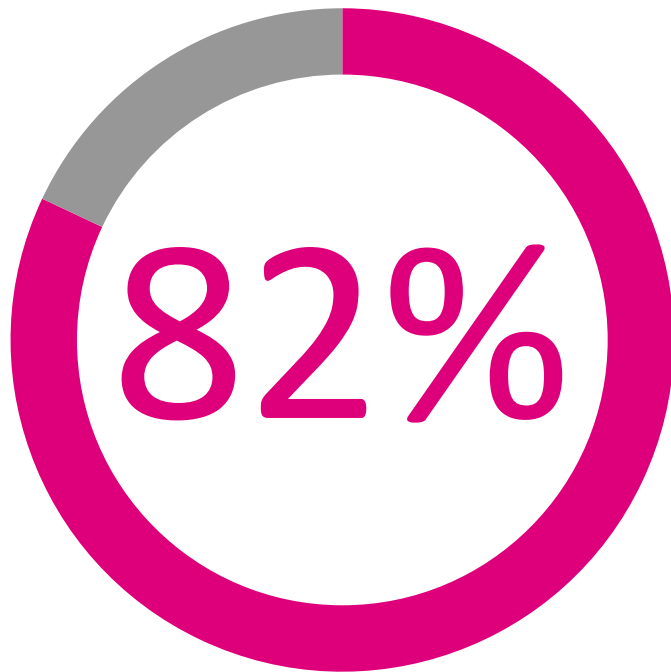
Needing to take
public transport



Having to book
a time slot to visit

Are audiences engaging with visual
arts online?

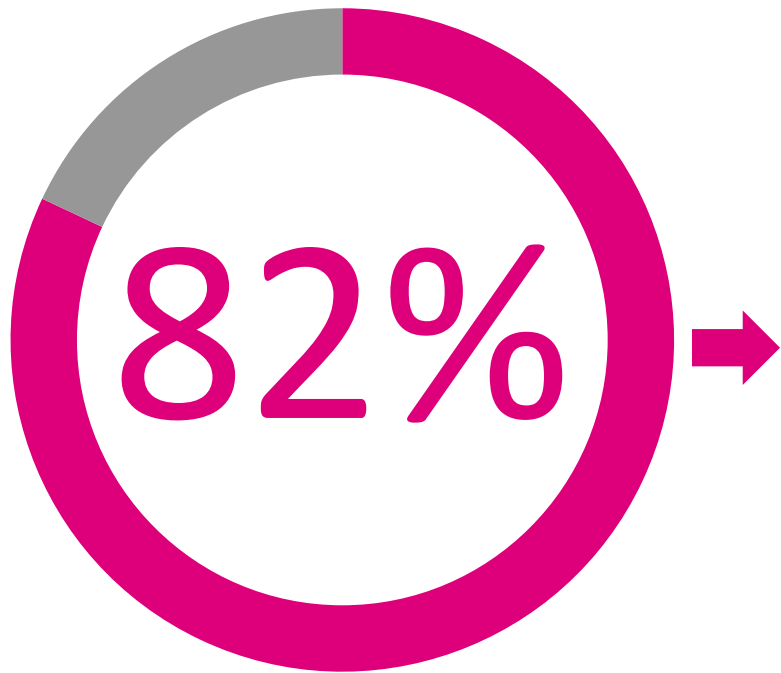
YES



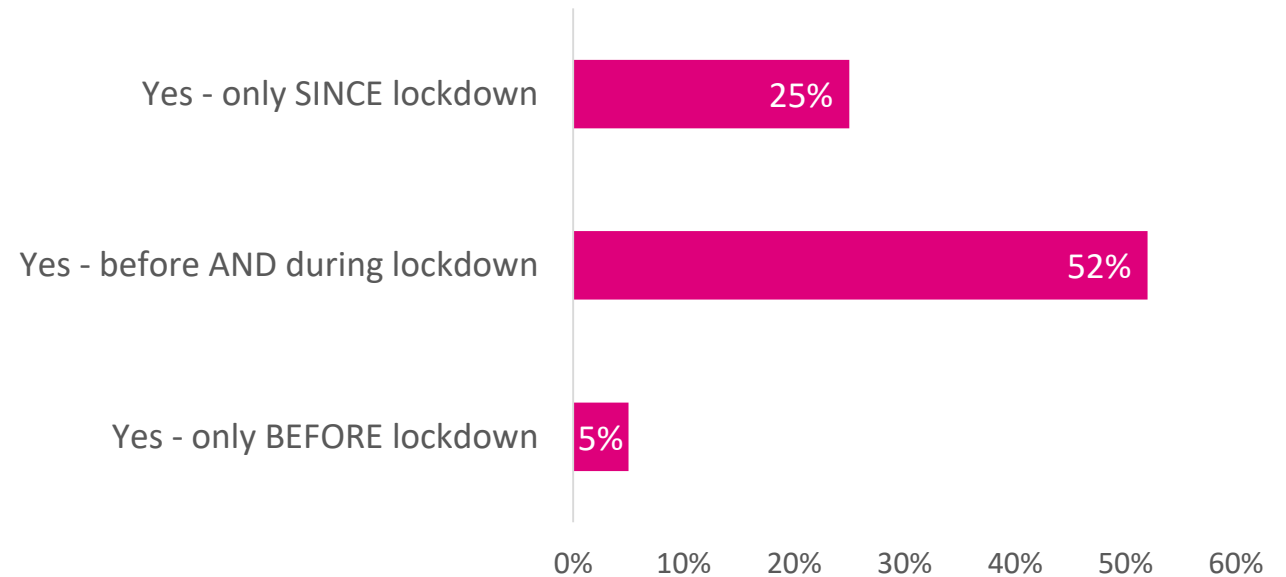
of audiences of NI galleries
have engaged with visual arts online

Visual arts audiences are much more likely to have engaged online
than attenders of live cultural events (55%) in After the Interval

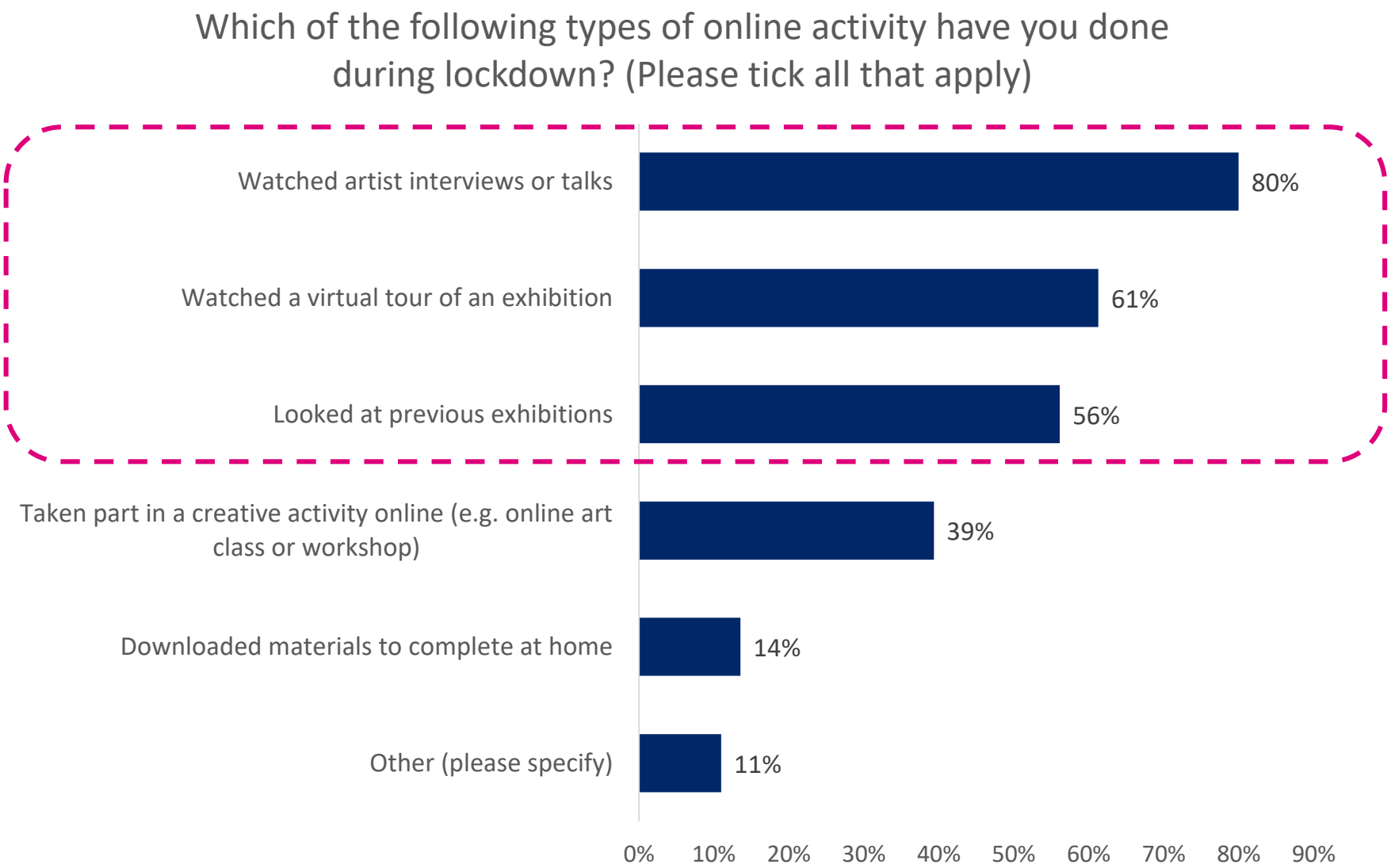
And of those who have engaged with visual arts online, most have done so both before and during Covid. This differs slightly from audiences for live cultural events, where most people were new to online events since Covid started.



Have you engaged with any visual arts activities ONLINE, either before or during the recent lockdown?

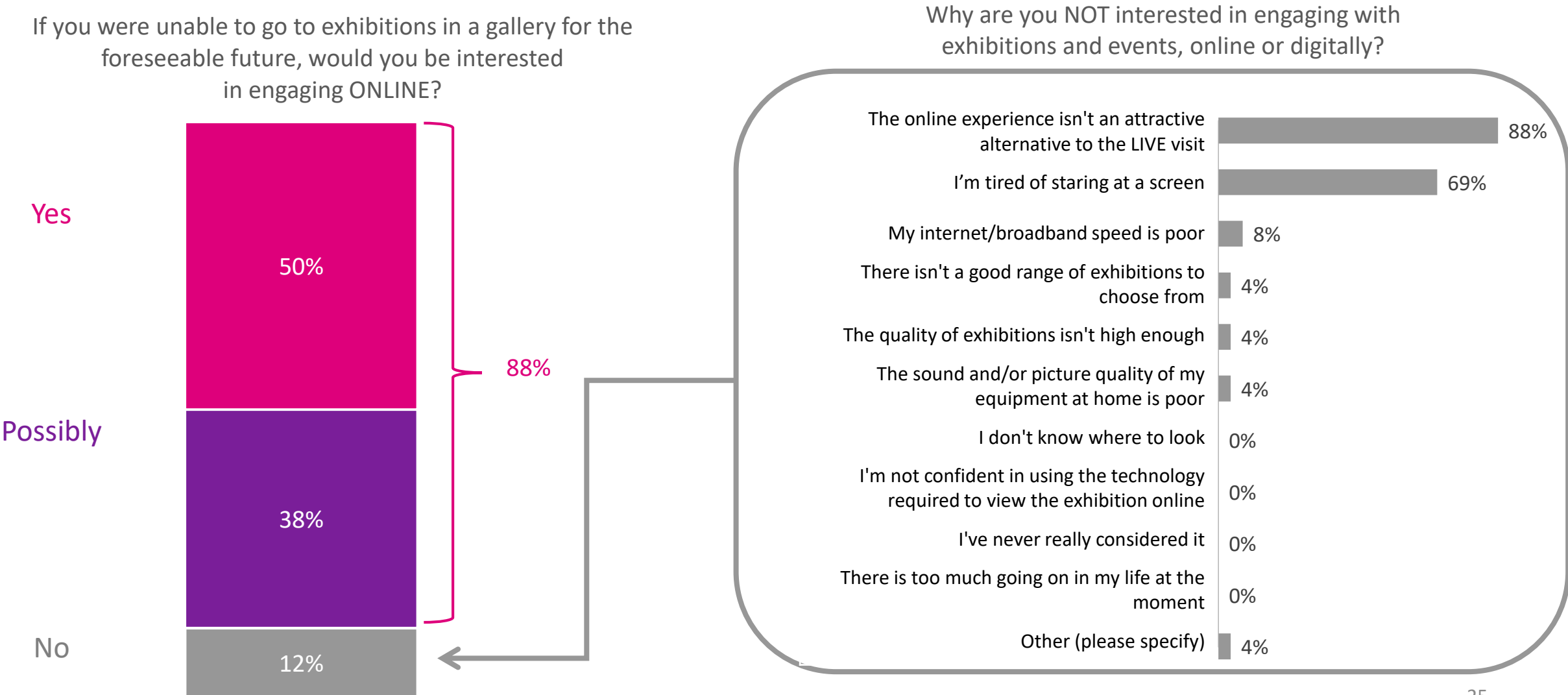


Online, audiences were most likely to watch talks and interviews, take a virtual tour, or look at previous exhibitions



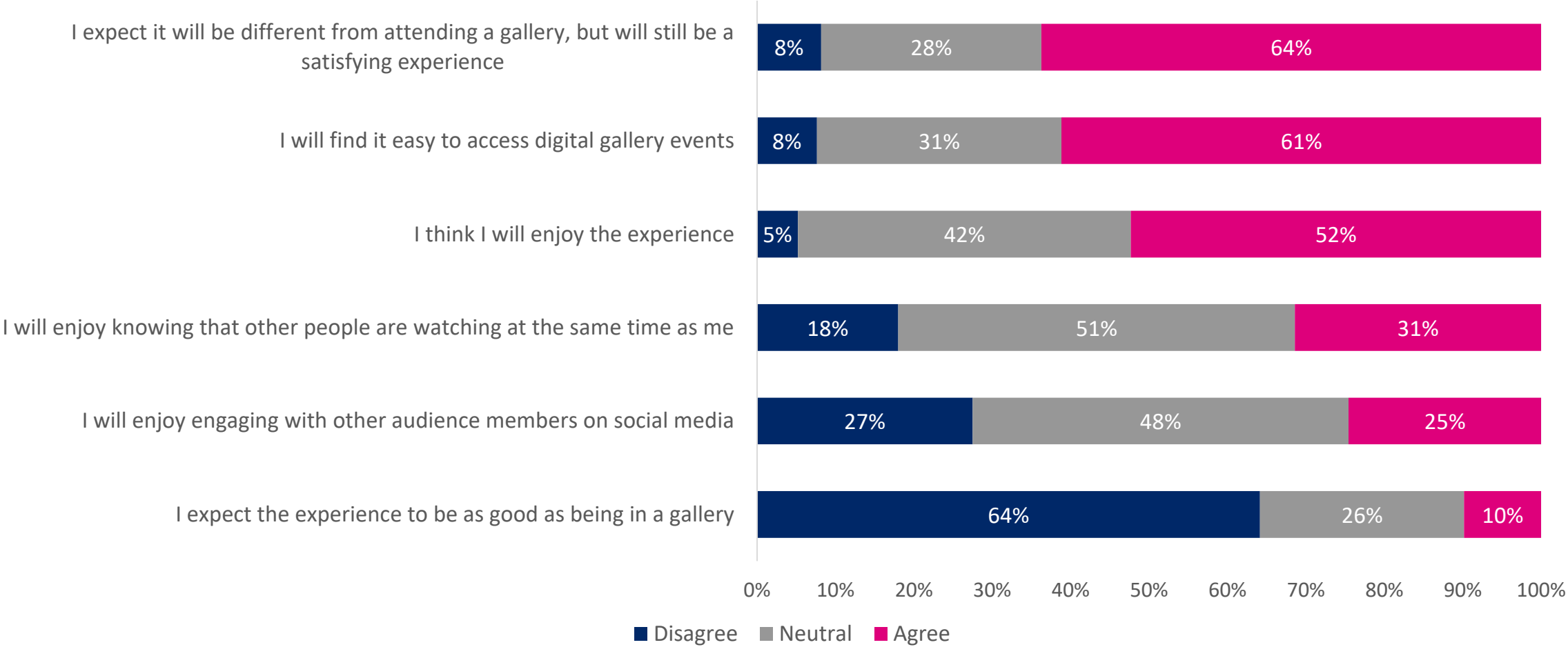
Would audiences be interested in
engaging with visual arts online
in the future?

Yes – 88% would be interested in engaging online. Of those who were not interested in engaging online, most either said that the online experience was not an attractive alternative to a live visit, or said they were tired of staring at a screen.



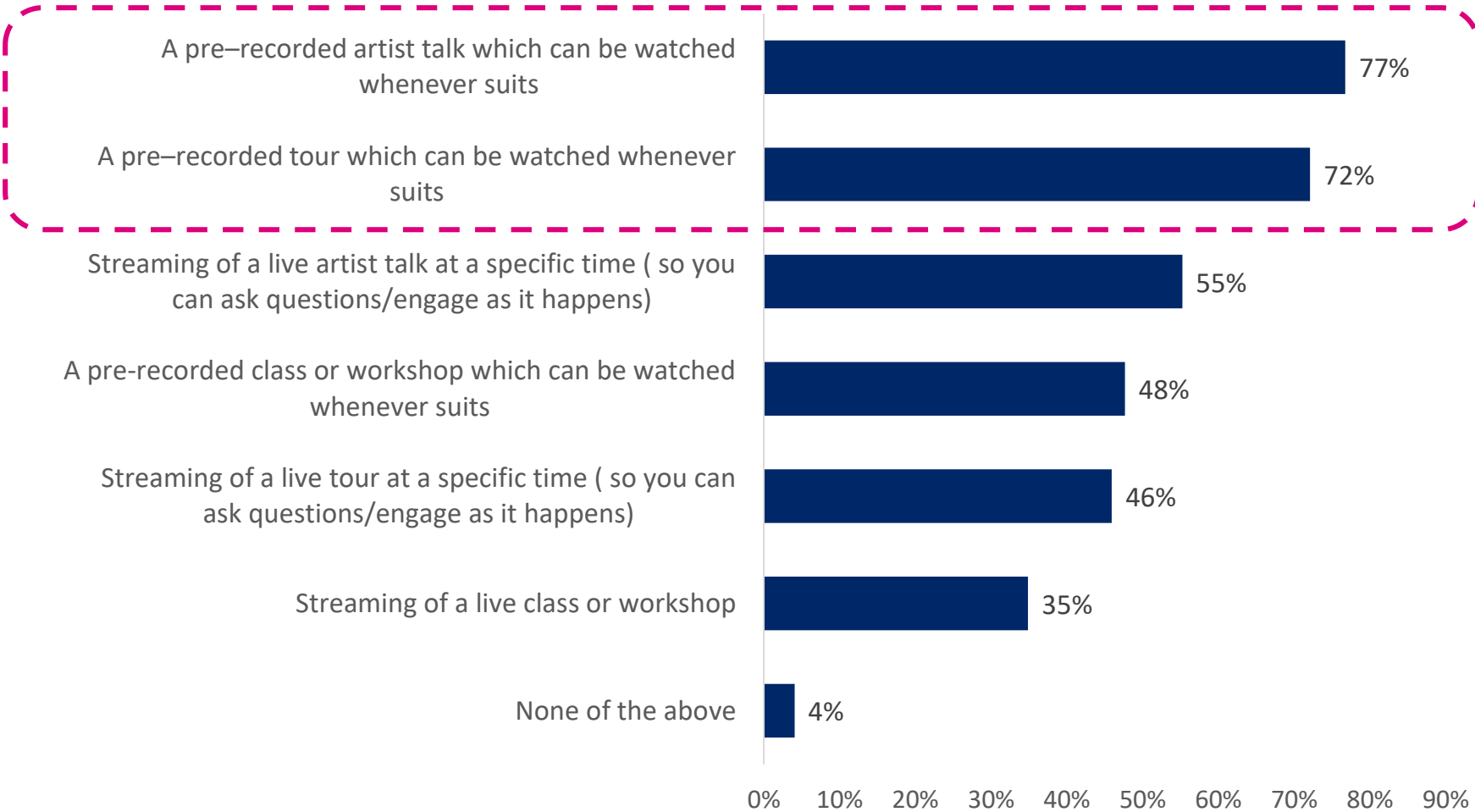
The expectation is that while visual arts online will be different and still a satisfying experience, it won't be as good as going to a gallery in-person

To what extent do you agree with the following statements regarding your expectations for online visual art events?



Most audiences are interested in pre-recorded talks or tours, possibly for watching at a time convenient to them

Which of the following might you be interested in engaging with online in the future? (Please tick all that apply)

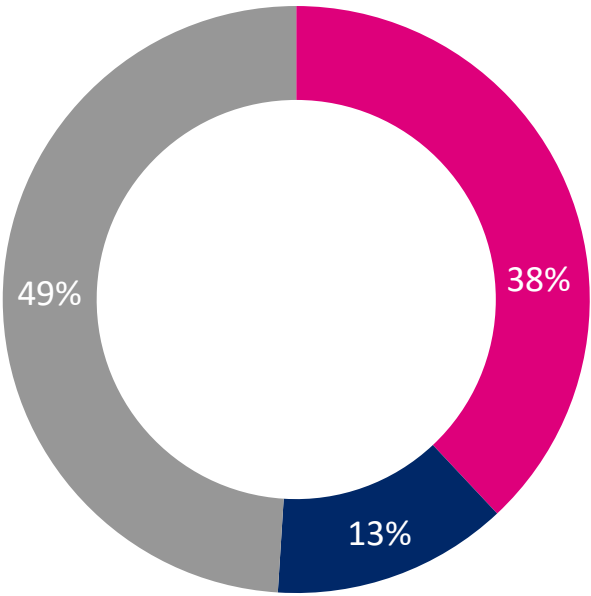


Of those who are open to streamed events, weekday evenings and weekend afternoons/evenings were preferred times to watch a live stream

Would audiences be willing to pay
for visual art content online?

Half of audiences are unsure whether they would pay or not. Of those who are willing to pay for online content, the vast majority would prefer to pay a fee per event.

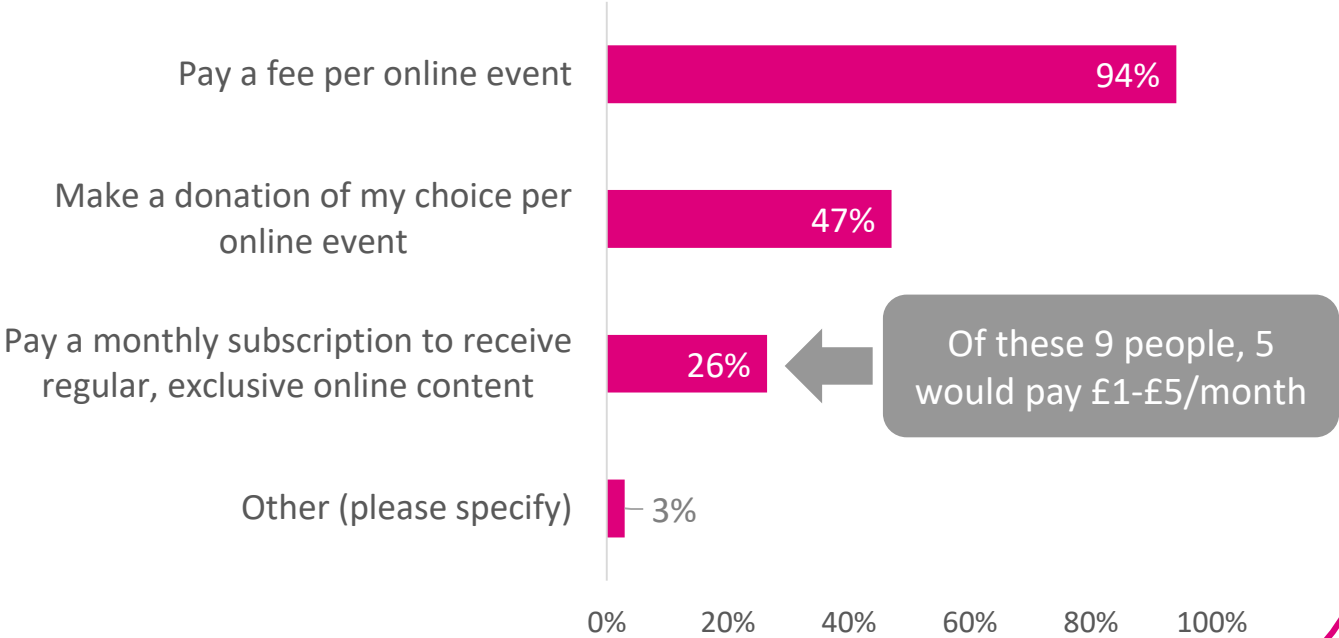
% willing to pay for visual art content online:



■ Yes ■ No ■ Not sure



Which of the following types of payment models would you be willing to use? Please tick all that apply



Most audiences agree that galleries should share content online, and that they feel the emotional benefits of accessing visual arts online



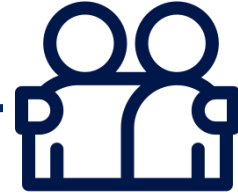
75%

Agree that galleries
should share
content online
moving forward



75%

Agree that accessing
visual arts online
helps to improve
their mood

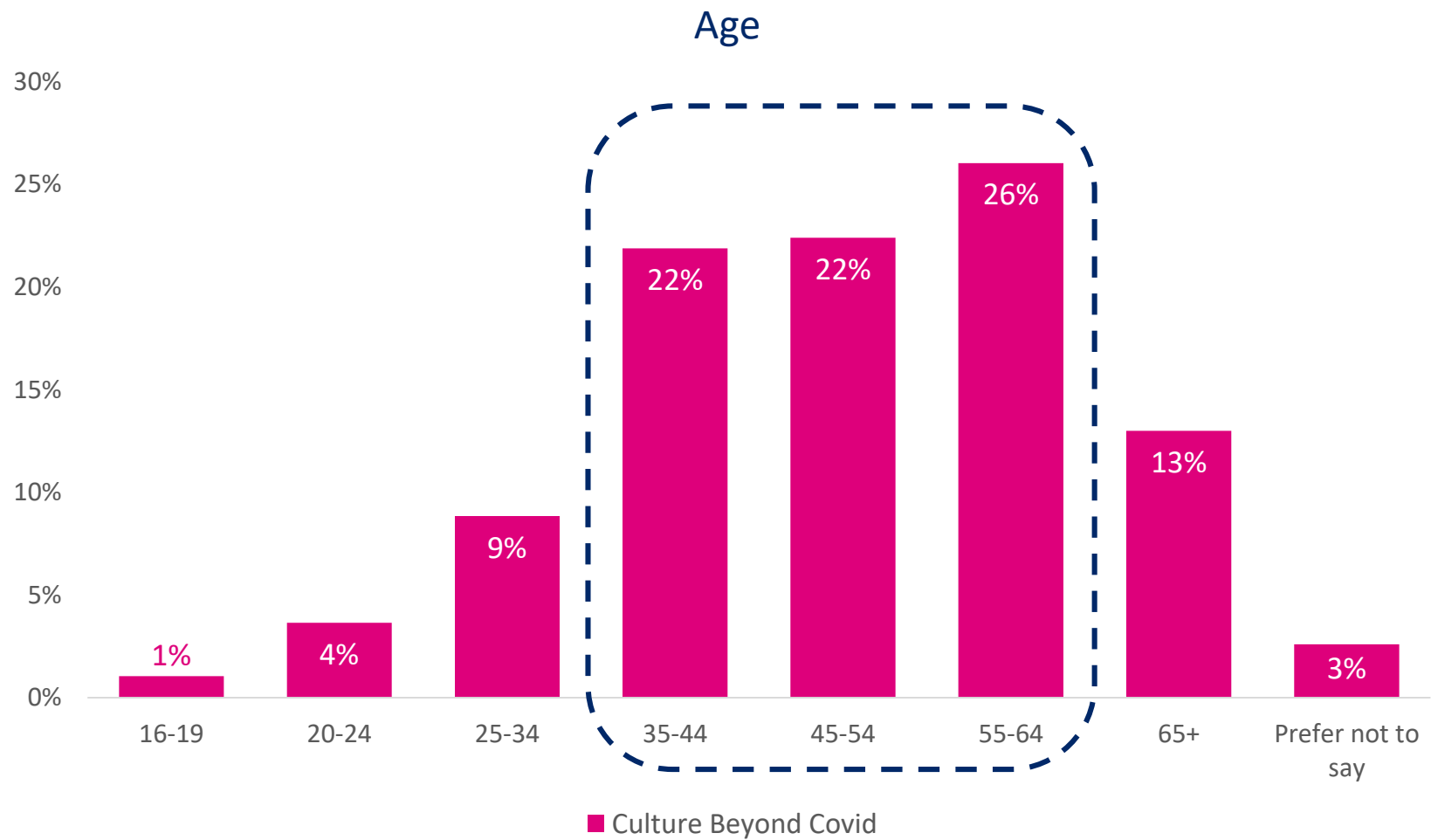


55%

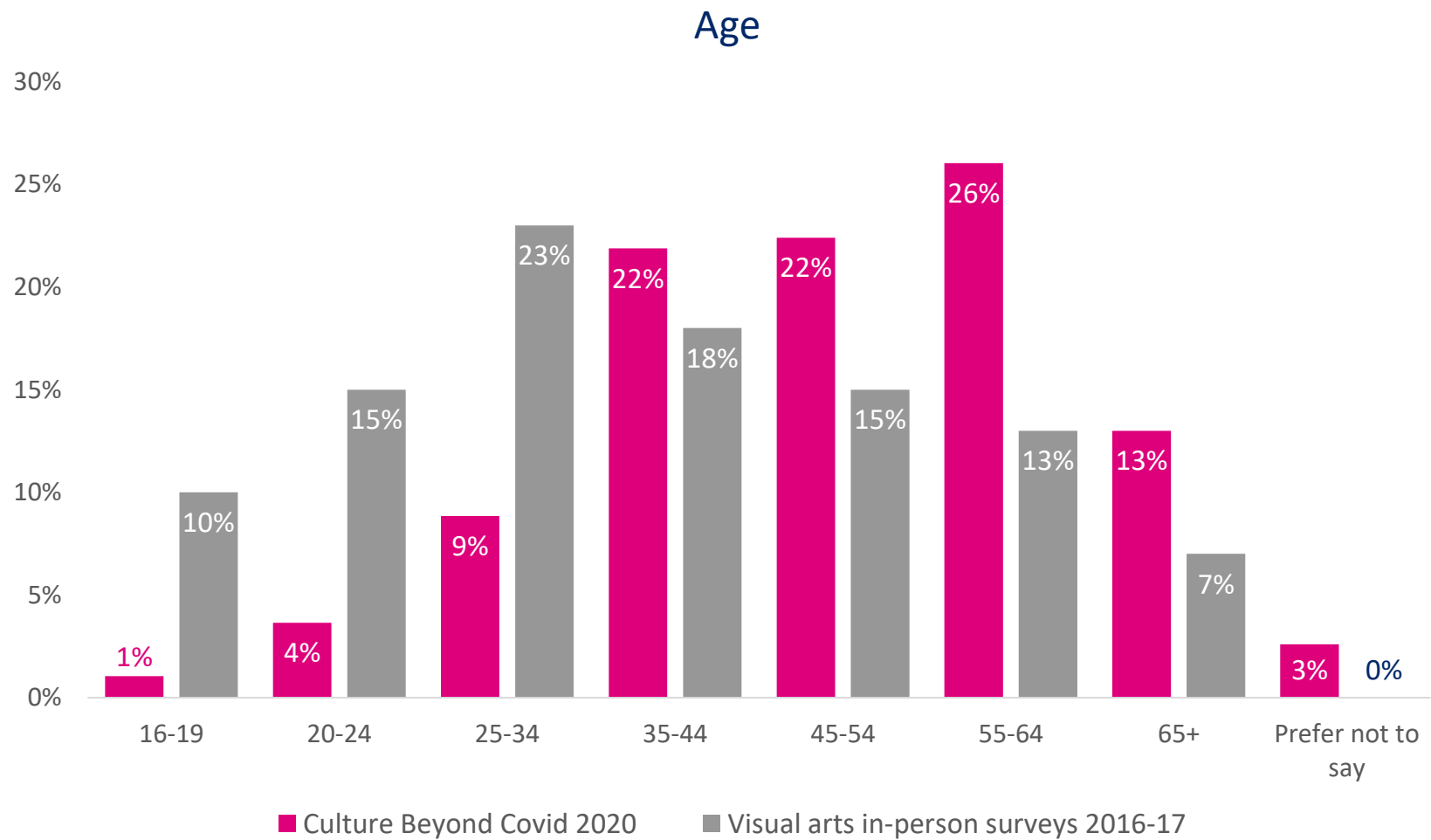
Agree that accessing
visual arts online
helps them feel less
lonely/isolated

What do visual arts attenders look like?

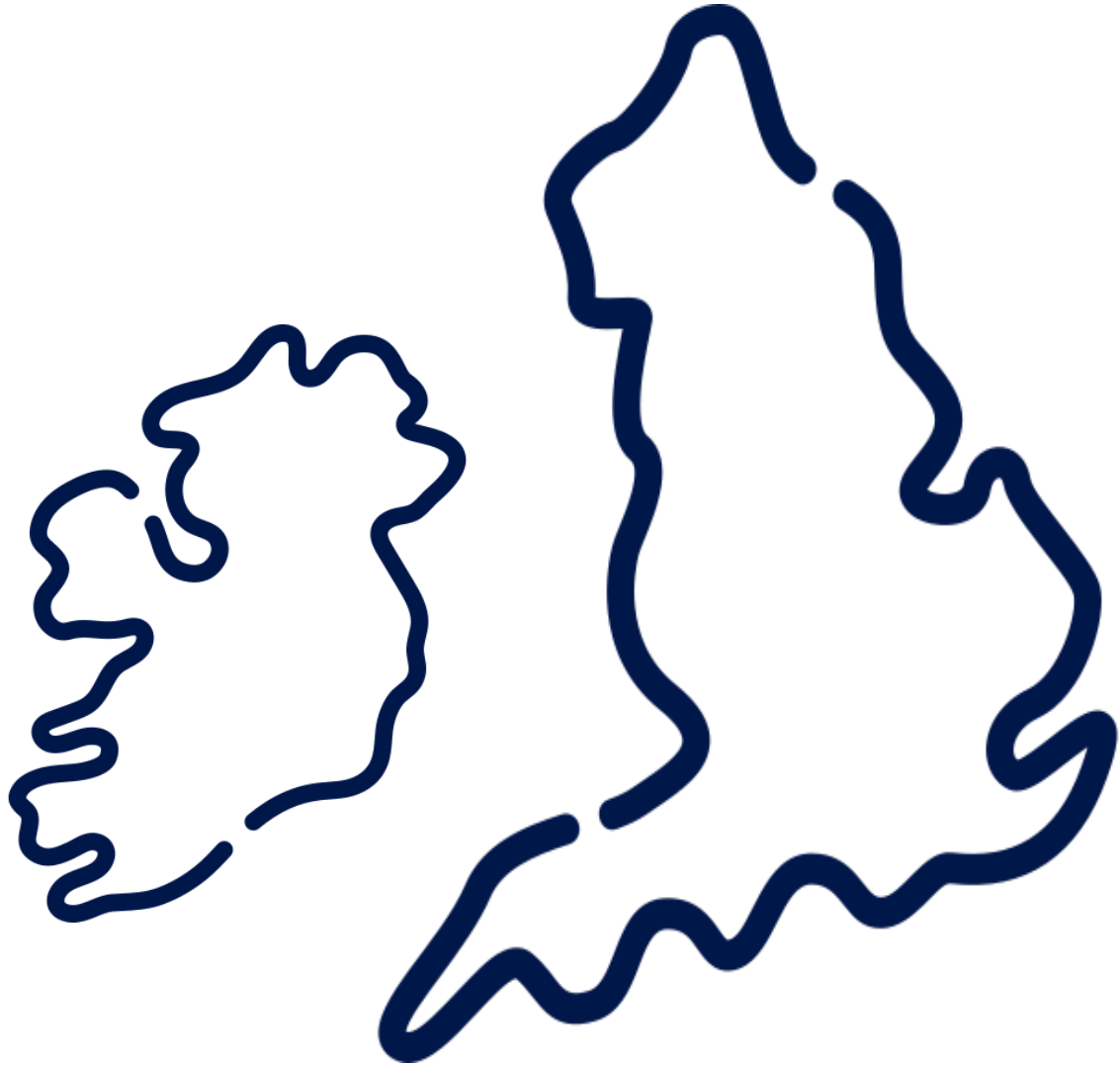
The majority of visual arts audiences surveyed were between the ages of 35-64



This is in contrast with in-person audiences surveyed by thrive in 2016-17, which showed a younger audience visiting visual arts galleries in Northern Ireland



Where do visual arts
audiences live?



Over a quarter of visual arts audiences surveyed are vulnerable to Covid, and more than a third experienced a loss of income as a result of the pandemic



27%

Are vulnerable to
Covid



38%

Had their income
reduced as a result
of Covid

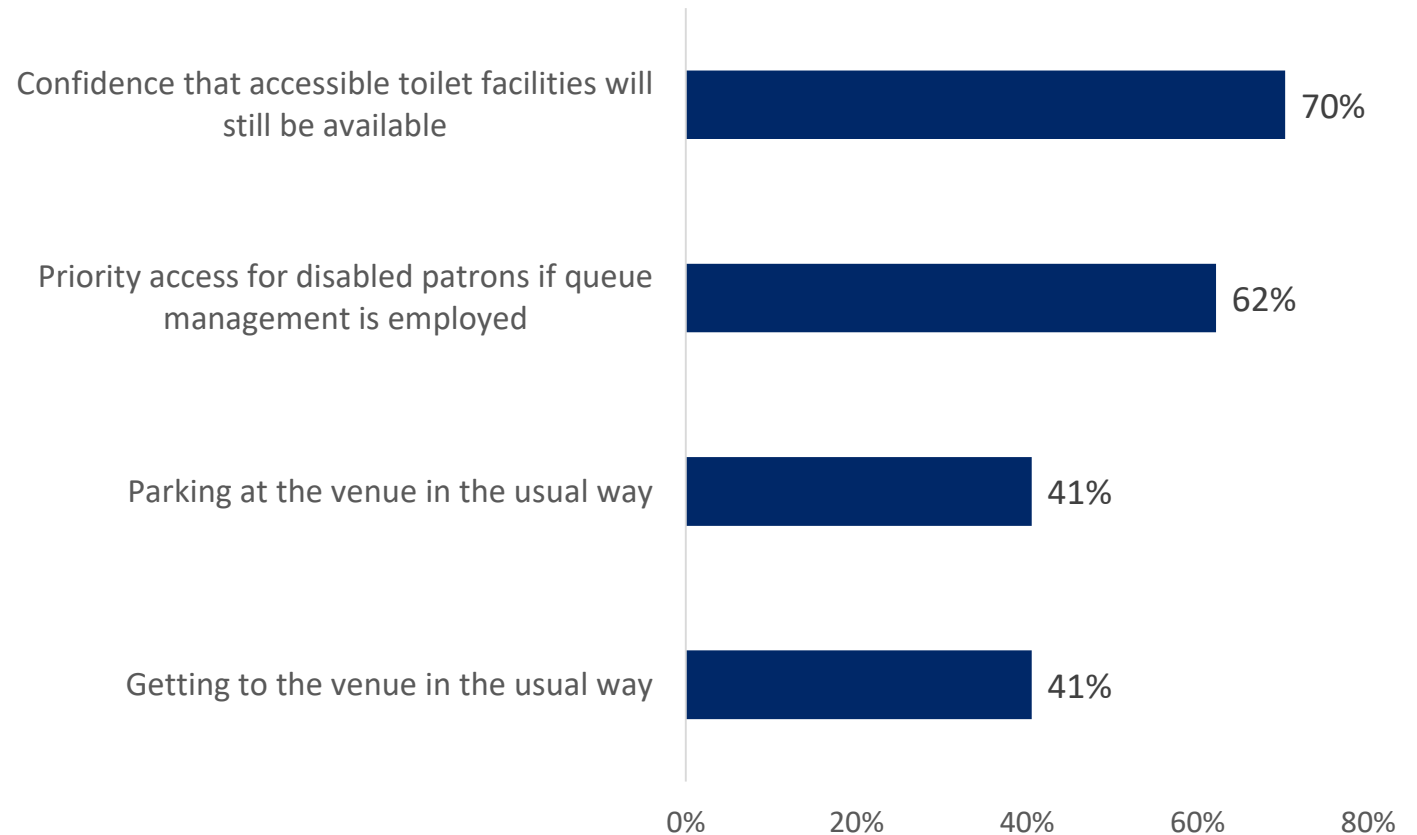
This is much higher than audiences of live cultural events, where 25% experience a loss of income as a result of Covid

One fifth of visual arts audiences surveyed identify as disabled, and accessible toilet facilities and priority queue access are very important to these audiences

19%

Identify as D/deaf or disabled, or have a long-term health condition

Please tell us how important each of the following would be in making a decision when to return to galleries:
(% saying 'more important')



Discussion

wewillthrive.co.uk

For queries about this project, please contact
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