



# Does Culture Matter?

Audiences for arts and culture tell us what matters

**Crystallised**

23 March—20 July 2020

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Culture Changes the World

# Yes.

## But, to who, how much, when and why?

As Coronavirus took its toll on our country, health, livelihoods and culture sector, we were compelled to do something useful.

Audience comes first for us. Every marketing, audience development or communications project should start with an audience need. So, we took the rare opportunity to talk to audiences, and not-yet-audiences without a time pressure or specific project in mind.

### The purpose:

- to understand how audience relationships with arts and culture are changing
- to understand the importance of arts and culture in our day-to-day lives
- to see how we can connect more broadly with a range of audiences and not-yet-audiences.

Here you'll find some of the key insights from the first four months of the project; this is broad strokes and is a place to start conversations or spark thoughts. If you want to know something specific, or explore something in more detail, get in touch with us.

*A note on methodology: 1,092 self-selecting individuals (random sample) regularly answering questions each week, where new individuals joined the project, they were asked the same questions as previous participants. Where we've cut data by age groups or other audience segmentation it's because that's where the data showed the most significant difference.*

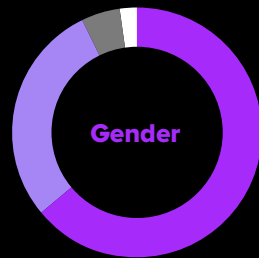
# Pay Attention

## If you're a "skim the highlights and check the details later" kind of person, here's your top ten.

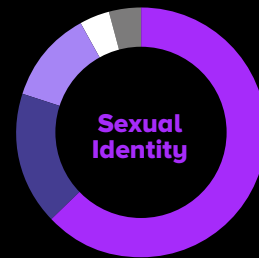
1. This was a self-selecting group of c.1,000 respondents answering weekly questions between 23 March and 20 July 2020, about their views on, and relationship with, arts, culture and entertainment.
2. One third of respondents are what the sector would term 'not culturally engaged' – we dispute this label based on our experience and research – in fact the report will show broad engagement in non-traditional art-forms.
3. Before Coronavirus, audiences were largely into **visiting gardens, parks, cinemas, galleries** with some small variations by age group, e.g. under-24s are 60% more likely to go to a music venue than over-24s at least once per month.
4. During lockdown, people are much more willing to try new cultural experiences. Because risk is removed and it's more accessible than ever before, 61% try something new between March and July 2020.
5. The value of arts and culture isn't disputed, **almost everyone thinks arts and culture are essential** (98%), less than half of us (47%) actually want to pay for it.
6. The definition of culture is way broader than the traditional sector art-forms; this presents an exciting opportunity to connect with a wider range of people, with different interests and passions.
7. Audience confidence in returning to venues or events is increasing week-by-week, audiences are strongly preferring outdoor events than indoor events.
8. We've identified clear marketing opportunities for audiences who are now increasingly relying on recommendations from a trusted source more than other marketing tactics.
9. In the short-term (summer/autumn 2020) audiences want to feel safe, they want to see very obvious safety measures in place at events/venues. Our number one recommendation here is to use video content to show as well as tell, audiences how you will keep them safe.
10. In the longer-term (2021) audiences are looking for cultural activities in their neighbourhoods, to be inspired, to feel warm, welcomed and connected; we are viewing this as an audience need to recover from the physical distancing of 2020.

# People Matter

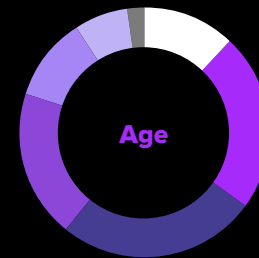
Taken from 1,092: random sample



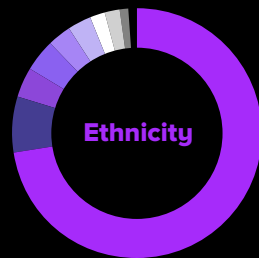
- 64%** Female
- 29%** Male
- 5%** Non-binary
- 2%** Prefer not to say



- 63%** Straight
- 17%** Bisexual
- 12%** Gay/lesbian
- 4%** Prefer not to say
- 4%** Prefer to self describe



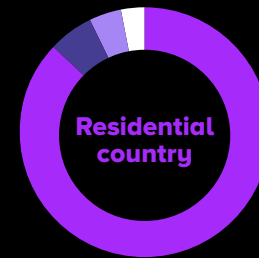
- 12%** 16-24
- 23%** 25-34
- 26%** 35-44
- 19%** 45-54
- 11%** 55-64
- 7%** 65+
- 2%** Prefer not to say



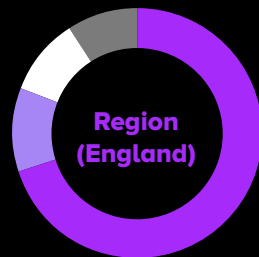
- 72%** White
- 7%** Prefer not to say
- 4%** British Asian
- 4%** British
- 3%** Black British
- 3%** Irish
- 2%** European
- 2%** Chinese
- 1%** Latin/Hispanic
- 1%** Jewish



- 17%** Yes
- 81%** No
- 2%** Prefer not to say



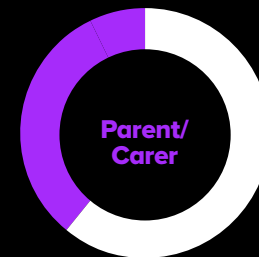
- 87%** England
- 6%** Scotland
- 4%** Wales
- 3%** Northern Ireland



- 70%** North 70%
- 11%** London 11%
- 10%** South 10%
- 9%** Midlands 9%



- 61%** Yes
- 32%** No
- 7%** Unsure



- 66%** No
- 34%** Yes

One of the most important things to us was to ensure we were hearing from people involved or interested in a whole range of cultural pursuits.

Especially those outside of what might typically be thought of as traditional cultural activities and art-forms.

Our Does Culture Matter? survey participants are a self-selecting group of people from across the UK.

# Culture Changes the World

## Which cultural events and activities are we asking about?

- Theatres
- Cinemas
- Art Galleries
- Museums
- Libraries
- Castles/Historic sites
- Comedy Clubs
- Art Festivals
- Literature Festival
- Film Festivals
- Music Festivals
- Live Music Venues
- Science centres

## Behaviours before Coronavirus

We've spent some time understanding what audiences were doing and thinking prior to Coronavirus hitting the UK. Most of these questions asked people to think about the 12 months prior to March 2020.

Around one third of respondents are what the cultural sector might refer to as 'hard to reach,' with 11% stating they have never attended a cultural event or venue we asked about, and 21% engaging less than once per year.

## What were we doing?

**Gardens and parks** topped the list of all age groups as the place most frequently visited before Coronavirus, followed by the **cinema** across all age groups.

Outside of arts and cultural pursuits, our audiences said, given the choice of how to spend their leisure time, **dining out** and visiting the **countryside** or the **beach** both ranked higher than **gardens, parks** and **cinemas**.

## Across all ages

82% of people said they were visiting **gardens** or **parks** at least once per month in the year prior to Coronavirus.

## All respondents top four activities before Coronavirus

Gardens and Parks	82%
Cinema	49%
Museum	39%
Library	33%

## Age variations

**Under-24s** are 60% more likely than over-24s to visit a **live music venue** at least once a month

## Under-24s top four activities before Coronavirus

Gardens and Parks	84%
Cinema	44%
Live Music	41%
Library	28%

**Over-35s** are 20% more likely than under-35s to visit an art gallery at least once per month.

## Over-35s top four activities before Coronavirus

Gardens and Parks	83%
Cinema	51%
Museum	44%
Library	42%

## Think about access

**Those living with a disability are less likely to visit the cinema, theatre, live music venues and comedy clubs than those who don't live with a disability.**

**Those under-24 and living with a disability are 11% less likely to attend live music venues citing access as a primary concern.**

**Almost everyone thinks arts and culture are essential, less than half of us actually want to pay for it.**

Interestingly here, we can see that a huge proportion (almost 100%) of our audience believe in the importance of arts and culture to society and to the individual. This percentage decreases the more we start to ask about funding and cost of entry.

**97%**

**agree with the statement:**

Everyone should be able to access affordable or free arts and culture activities.

**72%**

**agree with the statement:**

Arts and culture venues should be free to enter.

**98%**

**agree with the statement:**

Arts and culture are an essential part of society.

**47%**

**of people believe that:**

Arts and culture should be 'predominantly funded by the tax-payer'.

# Culture is Shifting

**During lockdown, we see a huge rise in people trying out new cultural experiences and activities online.**

61% told us they tried cultural activities they would never have considered before Coronavirus lockdown. We believe a number of factors influence those decisions including the vast swathes of available content, the affordability of the content (in many cases free or pay what you feel) and people actively looking for new things to do, to stave off boredom or provide entertainment.

**One third of people who had not seen theatre in at least 12 months watched online theatre at least once in the first month of UK lockdown.**

**All age groups**

I have joined in with these multiple times during lockdown.

Watched theatre	40%
Watched live music	34%
Watched a comedian	21%
Took a museum tour	16%
Took an art gallery tour	15%

**Under-34s**

I have joined in with these multiple times during lockdown.

Watched live music	38%
Watched theatre	34%
Joined a watch-party	24%
Took a museum tour	20%
Watched a comedian	19%

**Over-44s**

I have joined in with these multiple times during lockdown.

Watched theatre	49%
Watched live music	32%
Watched a comedian	24%
Took an art gallery tour	19%
Took a museum tour	18%



# Culture is Ours

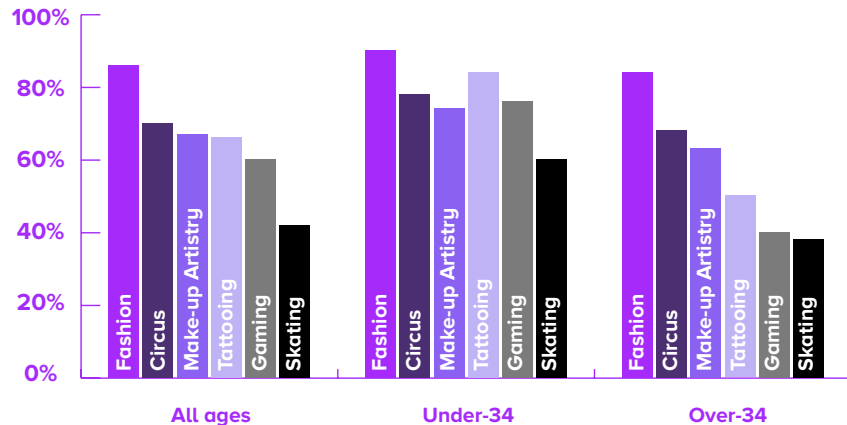
We regularly ask our respondents about their views or relationships with the traditionally held art-forms that are part of our arts and culture sector.

A major part of this project is to hear from audiences and potential audiences who are culturally engaged, but in different, niche or less 'recognised' art-forms.



## We asked 'what is culture?'

Under-34 year olds are more likely to have a broader acceptance of what constitutes 'culture,' and are likely to be less purist about art-forms.



## Representation matters

We asked our respondents, how regularly do you see yourself, the way you live your life, the values that matter to you represented in the culture you consume. This could be, on TV, in music, in a gallery, on the stage, on the catwalk?

	All respondents	Living with a disability	People of Colour
Never	4%	75%	62%
Rarely	17%	22%	26%
Sometimes	52%	2%	12%
Always	27%	1%	0%

# Be Quiet and Listen

## It's more important than ever to listen to and, stay connected with your audiences.

First of all, audiences still want to hear from you. Just 8% of customers in 30 countries thought that stopping advertising should be a priority for brands.<sup>1</sup>

In that same study, 77% of respondents said they wanted companies to “talk about how they are being helpful in the new everyday life,” and 75% said marketing should tell audiences about your “efforts to face the situation.”

### This is echoed by the respondents of Does Culture Matter?

**82%**

say they still want to hear from organisations during the pandemic.

**74%**

say they want to hear about online activities, events or occasions they can join in with.

**72%**

say they were interested to hear what was being planned for the future.

**69%**

of people say they would like to understand how cultural organisations are supporting their community, staff and artists during this time. This increased by 28 percentage points from April to June 2020.

<sup>1</sup>Kantar, COVID-19 Barometer Survey 2020

## There are some major opportunities to connect differently with audiences through marketing.

We asked our respondents how they were finding out about events and activities before Coronavirus and how they'd prefer to find out.

In particular, there is a demand from audiences to receive recommendations from people or organisations they trust.

41% of people would like to see more what's on/arts and culture content/ recommendations from bloggers/ influencers they follow.

74% of people would like to receive recommendations from organisations they already trust – **make sure you choose your partner organisations wisely!**

It's become especially clear from our data that attempting to monetise the situation is particularly unwelcome, unless this comes with a clear value for audiences.

Just 29% of **Does Culture Matter?** respondents said they would be happy to receive fundraising asks from arts and culture organisations during this time, so be mindful when deciding how and where this happens.

	Currently	Prefer	Difference
Email newsletters	91%	92%	+1%
Recommendations	88%	90%	+2%
<b>Organisation website</b>	<b>82%</b>	<b>93%</b>	<b>+11%</b>
Facebook	80%	79%	-1%
Outdoor Advertising	71%	59%	-12%
Reviews	67%	71%	+4%
Google Search	61%	60%	-1%
<b>Other org recommendations</b>	<b>60%</b>	<b>74%</b>	<b>+14%</b>
<b>Leaflets</b>	<b>56%</b>	<b>78%</b>	<b>+22%</b>
Newspapers/magazines	49%	59%	+10%
Listings website	48%	57%	+9%
<b>Instagram</b>	<b>42%</b>	<b>58%</b>	<b>+16%</b>
Twitter	41%	51%	+10%
<b>Radio</b>	<b>33%</b>	<b>49%</b>	<b>+16%</b>
<b>Post</b>	<b>28%</b>	<b>60%</b>	<b>+32%</b>
<b>Bloggers/Influencers</b>	<b>23%</b>	<b>41%</b>	<b>+18%</b>

We asked audiences, how do you find out about cultural activities and how would you like to find out about cultural activities.



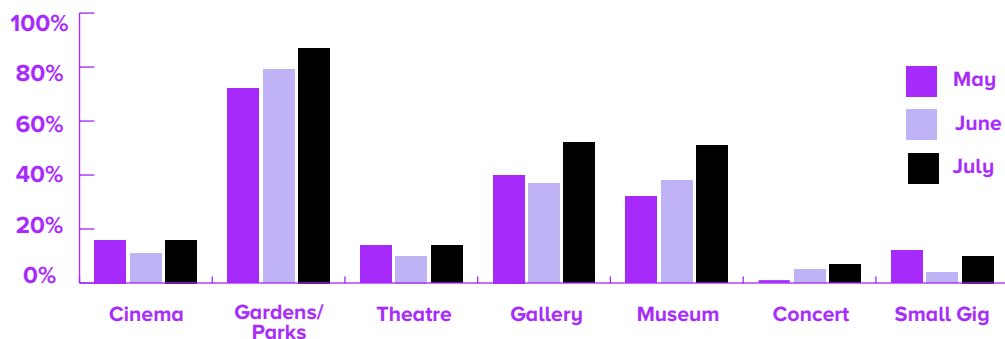
# A Curious New Way of Seeing.

**What does the future hold? In the immediate term, audiences are predominantly concerned about safety.**

As people are able to attend events and venues again, you should focus on:

- **telling** people what you're doing to make your venue/event safe
- **showing** people what you're doing to make your venue/event safe

**% of people who said they would feel safe at each venue or event.**



**Clear communication and transparency are key.**

Audiences are telling us they want to trust they will be safe; they want to see **how** you are trying to mitigate risk for them. Keep this at the heart of your communications, keep it **simple, open and warm.**

**Audience confidence**

We regularly ask audiences how they would feel in a variety of locations. As the environment changes, as government guidelines change and as the spread of the virus changes, audience sentiment changes.

We've seen a slow growth in confidence when it comes to **galleries** and **museums**; a much sharper increase in confidence for outdoor spaces and a continuing concern when it comes to venues or events where audiences perceive social distancing to be much harder to manage.

**38% of all respondents said they would be much more likely to attend an event this summer if it was held outside or they could access outdoor space.**

**Over three-quarters of all under-24s said face masks should be compulsory for all staff at all venues.**

**Over three-quarters of all people said they deemed the following essential:**

- Contactless payment
- Visible, increased cleaning
- Posters and announcements on new procedures
- Hand washing stations
- Sanitiser stations
- Hand sanitiser dispensed to every visitor on arrival
- Compulsory social distancing at all times
- Reducing usual capacity

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## What does the future hold? Audiences want community-based, community-led, inclusive activity.

Whether this is an immediate reaction to the physical distancing of 2020 or a longer-term trend we don't yet know, but we see a new-found emotional connection to and, appreciation for, our immediate neighbourhoods and a desire to see arts and culture spring from or come to those neighbourhoods.

### Hyperlocal activity

# 88%

of people want to see more arts and culture activities in their neighbourhoods, with respondents commenting on the lack of provision outside towns and cities.

### Community

# 65%

of people say arts and culture matters to them because it brings them closer to others.

# 96%

of people say that a recommendation or review from a person they trust is one of their top 3 considerations before attending an event. This includes, family, friends, bloggers or influencers.

### Ease of Access

# 84%

of people want to see an ongoing commitment from organisations to share content online as a standard. The availability of content during lockdown has given audiences extraordinary opportunities to experience cultural activity that would never usually have been on their radar.

# 32%

of people said they wanted to see theatres showing all performances online in the future.

# 68%

of people said they were more likely to take a risk on something during lockdown because it was online.

# 77%

of people say they would be likely or very likely to buy a monthly subscription costing up to £10 p/m to receive regular, exclusive online content; like performances, events, interactive or at-home activities.

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## A word on ethics.

### Audiences are paying attention.

64% of consumers around the world said that they would buy from an organisation or boycott it solely because of its position on a social or political issue.<sup>2</sup>

62% of our respondents said it was important or very important to them that arts and culture organisations took a public stance on Black Lives Matter and demonstrated action where improvement was needed.

34% of our respondents said that how an organisation treats its staff is a top consideration when deciding how to spend their time or money.

This is not something to fear. It is something to embrace and to put at the heart of your organisation. What do you stand for, what do you stand against, is this honest and true and how can you demonstrate it daily?

# We Demand Culture for Everyone

<sup>2</sup>PwC Future of Customer Experience Survey 2017/18

**If you're brave enough to create  
a cultural shift, then we have the  
experience to make that a reality.**

**If you're bold enough to stand up  
for what matters, then we will  
bring the know-how to get your  
organisation noticed.**

**If you're smart enough to use the  
power of culture to impact social  
justice, then we will shout it from  
the rooftops.**

**If you're human enough to know that  
culture is bigger than an institution,  
then we will be with you every step  
of the way.**

**How? With marketing that  
means something.**

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