Cultural Participation Monitor

Key Findings, March 2023

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the audience agency

In partnership with CENTRE FOR CULTURAL VALUE

About the Cultural Participation Monitor

A survey about changing attitudes and behaviours towards cultural engagement

Nationally-representative online survey
Sample: 25,000 in total

Shows regional and demographic differences

Wave 1: Oct-Nov 2020	Wave 5: Nov 2021
Wave 2: Feb 2021	Wave 6: Apr 2022
Wave 3: Jun 2021	Wave 7: Sep 2022
Wave 4: Sept/Oct 2021	Wave 8: Feb 2023

Sample of the whole population, all sectors

Current, regular and longitudinal

Linked to Audience Spectrum profiles

Background: Waves 1-5 AHRC-funded, as part of Centre for Cultural Value's *COVID-19: Impacts on the cultural industries and the implications for policy* research project.

Wave 8 was supported by Association of Leading Visitor Attractions

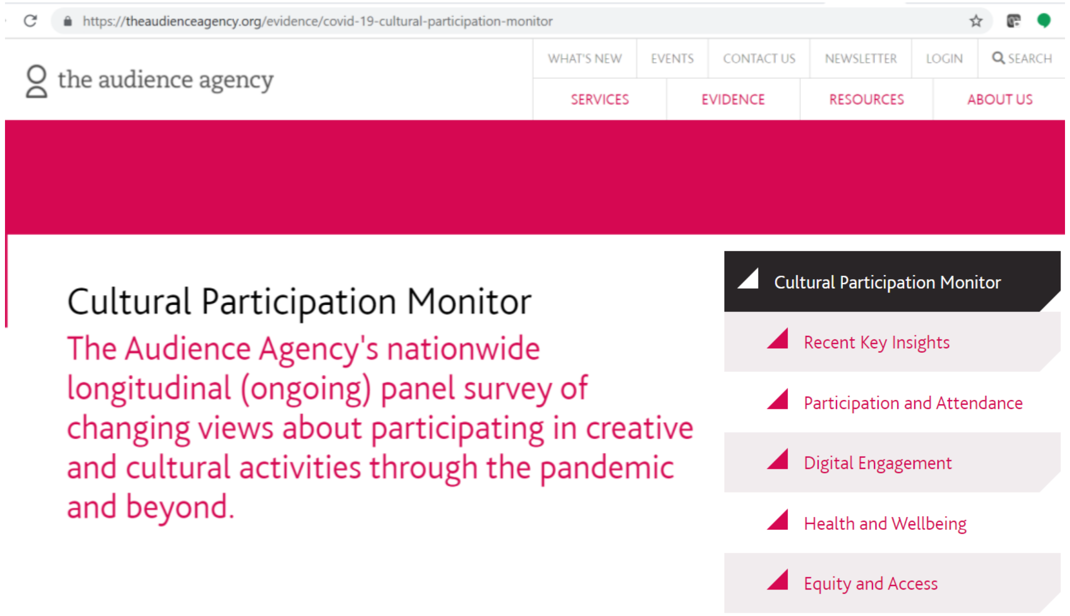
About the Cultural Participation Monitor

What it includes:

- Physical/digital/participatory cultural engagement
- Wider leisure habits/activity
- Attitudes and responses re COVID, Cost of Living and other issues

For:

- Previous baselines
- Current situation
- Future expectations.



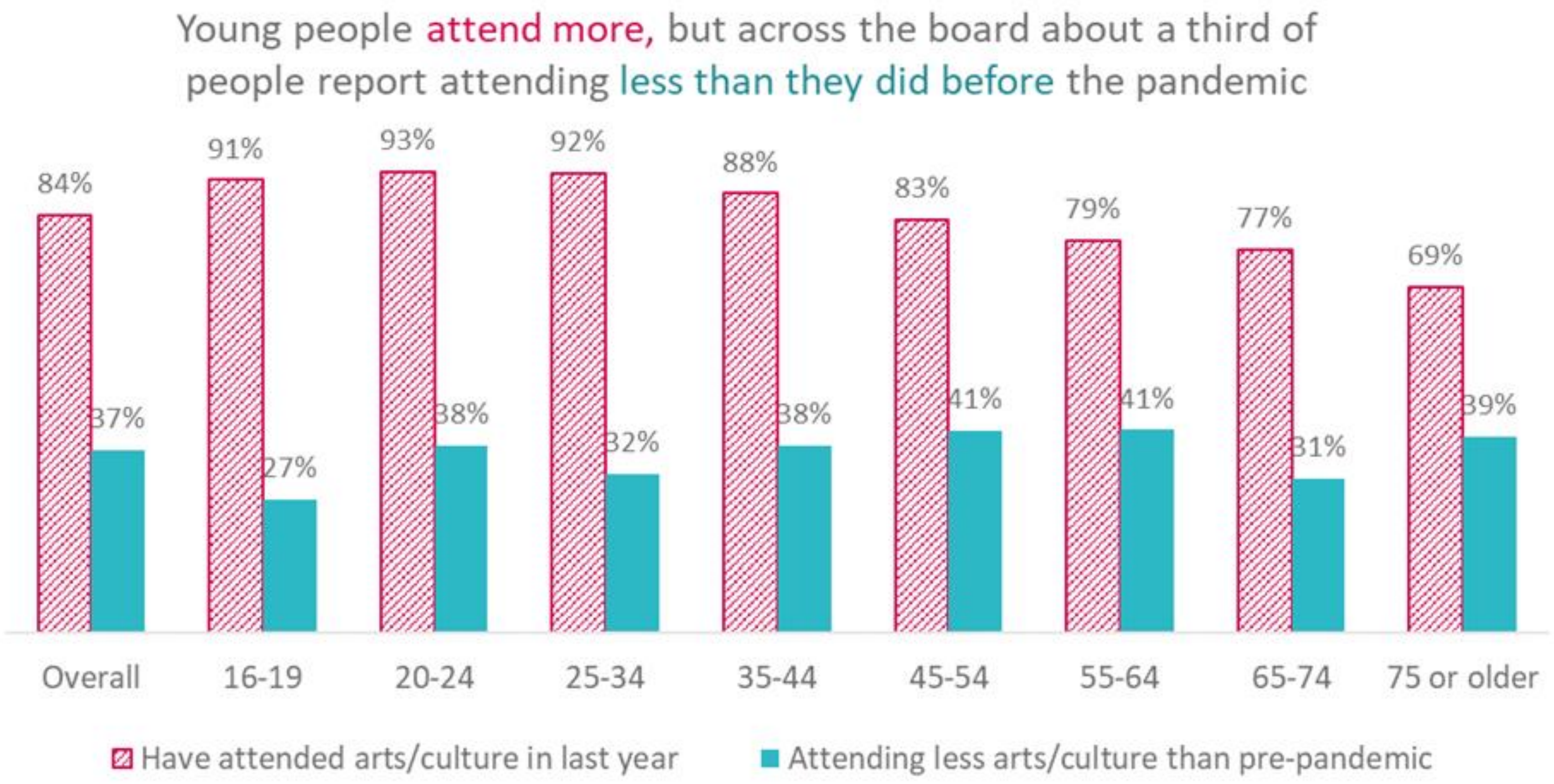
For overall findings from Wave 1-8 and by theme, see theaudienceagency.org/evidence

Wave 8 Key Topics

- Engagement
- Covid
- Cost of living
- Late booking
- Social Media
- Membership
- Volunteering
- Donations

1. Reasons for Not Attending: Covid/Cost of Living

Attendance

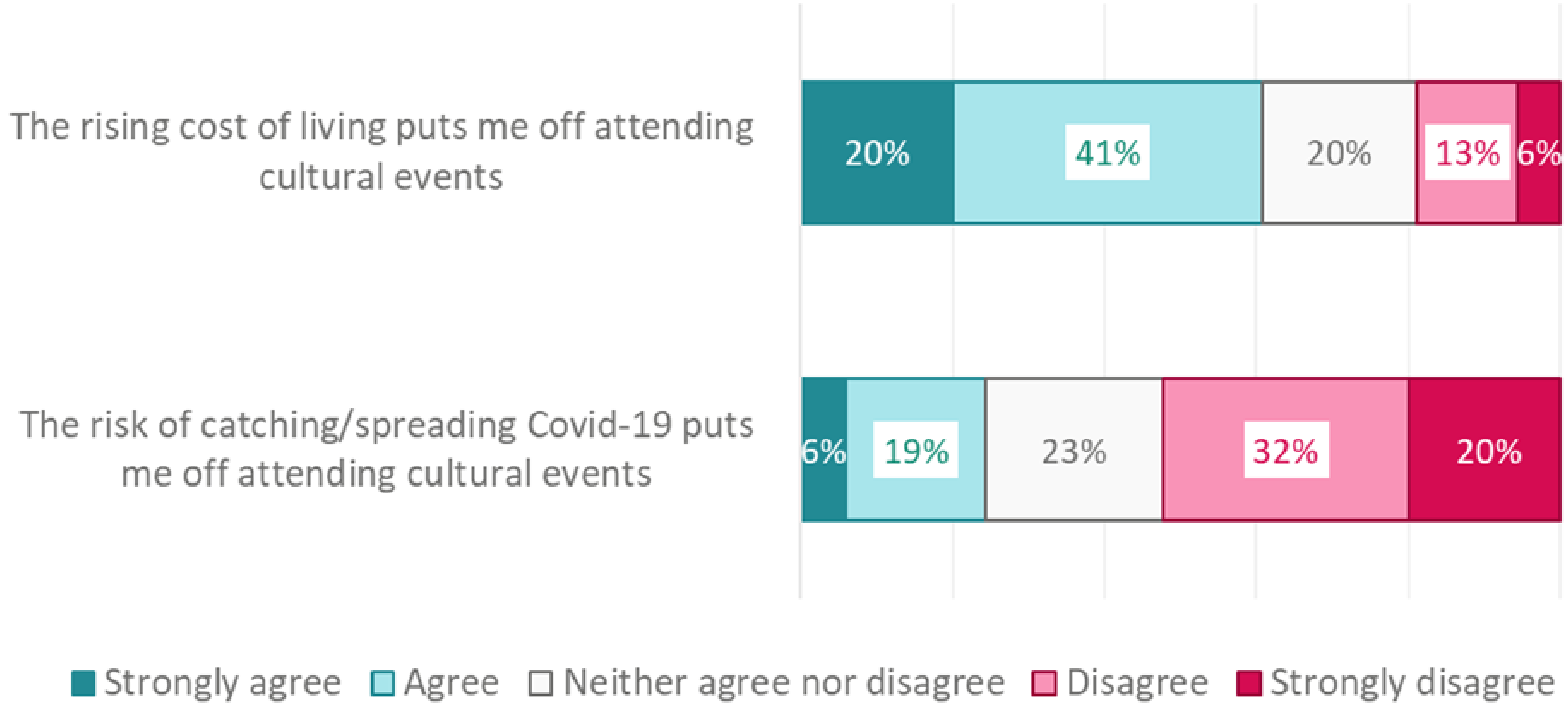


84%

have been to any **in-person arts/heritage event in last 12 months**

Down since Wave 7: 90%

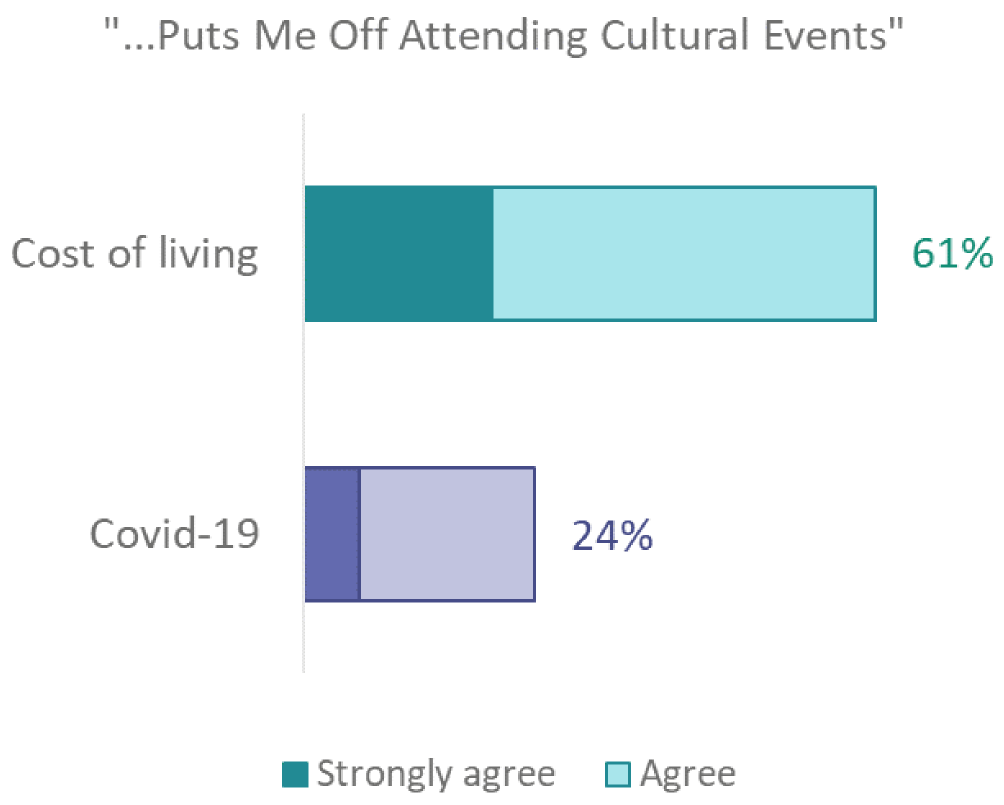
Barriers to Attendance

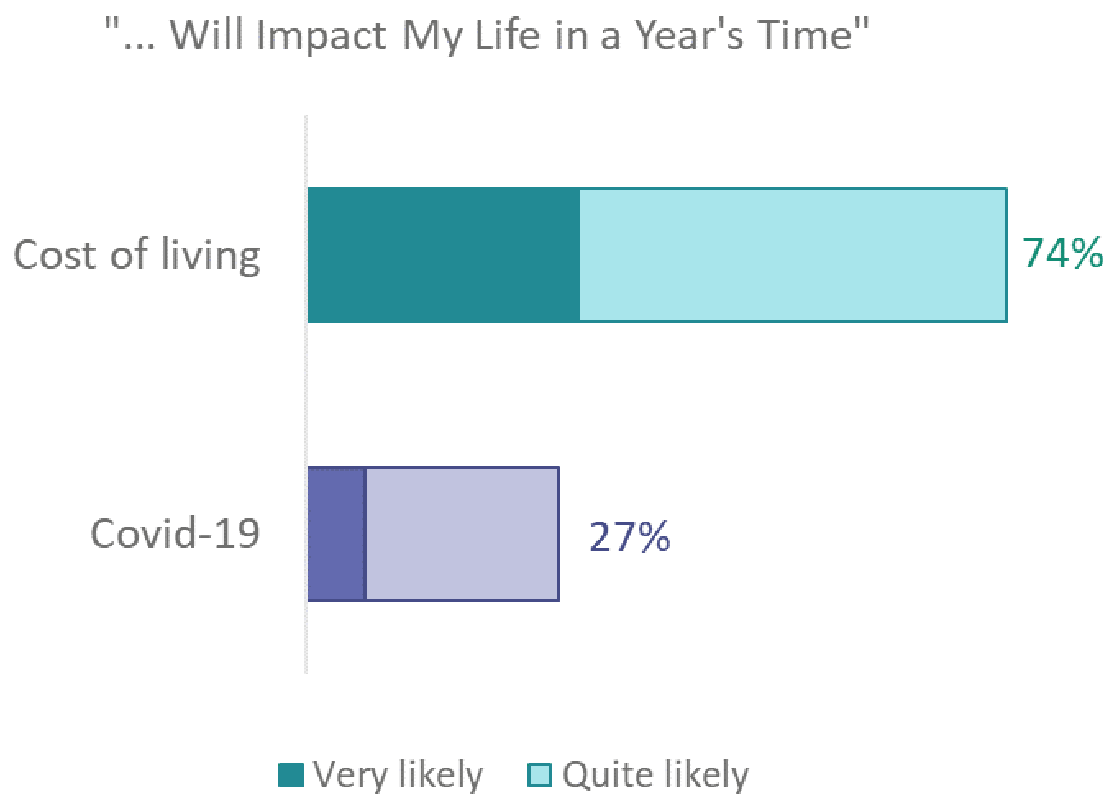


61%

say that the cost of living puts them off attending cultural events: cf. 24% for Covid.

Barriers to Attendance





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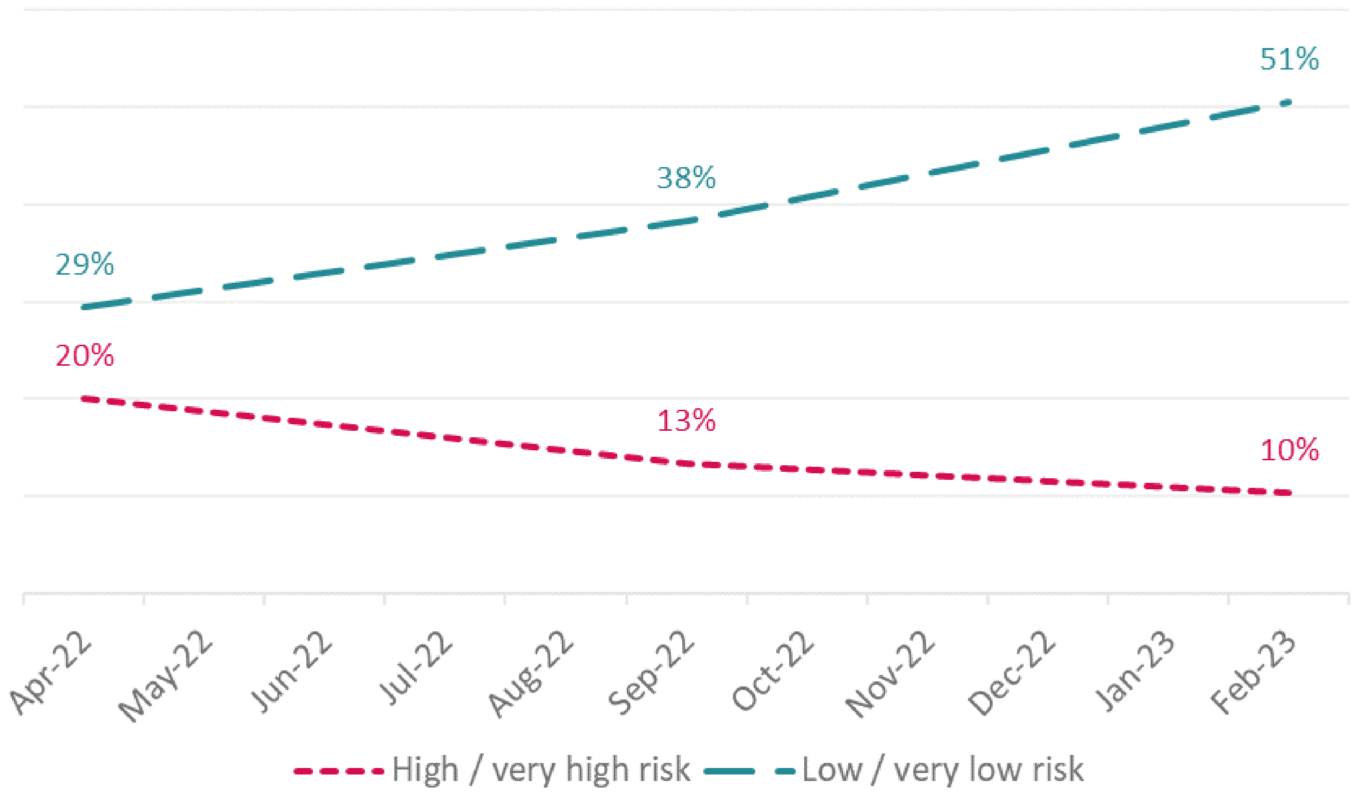
Attitudes to Covid

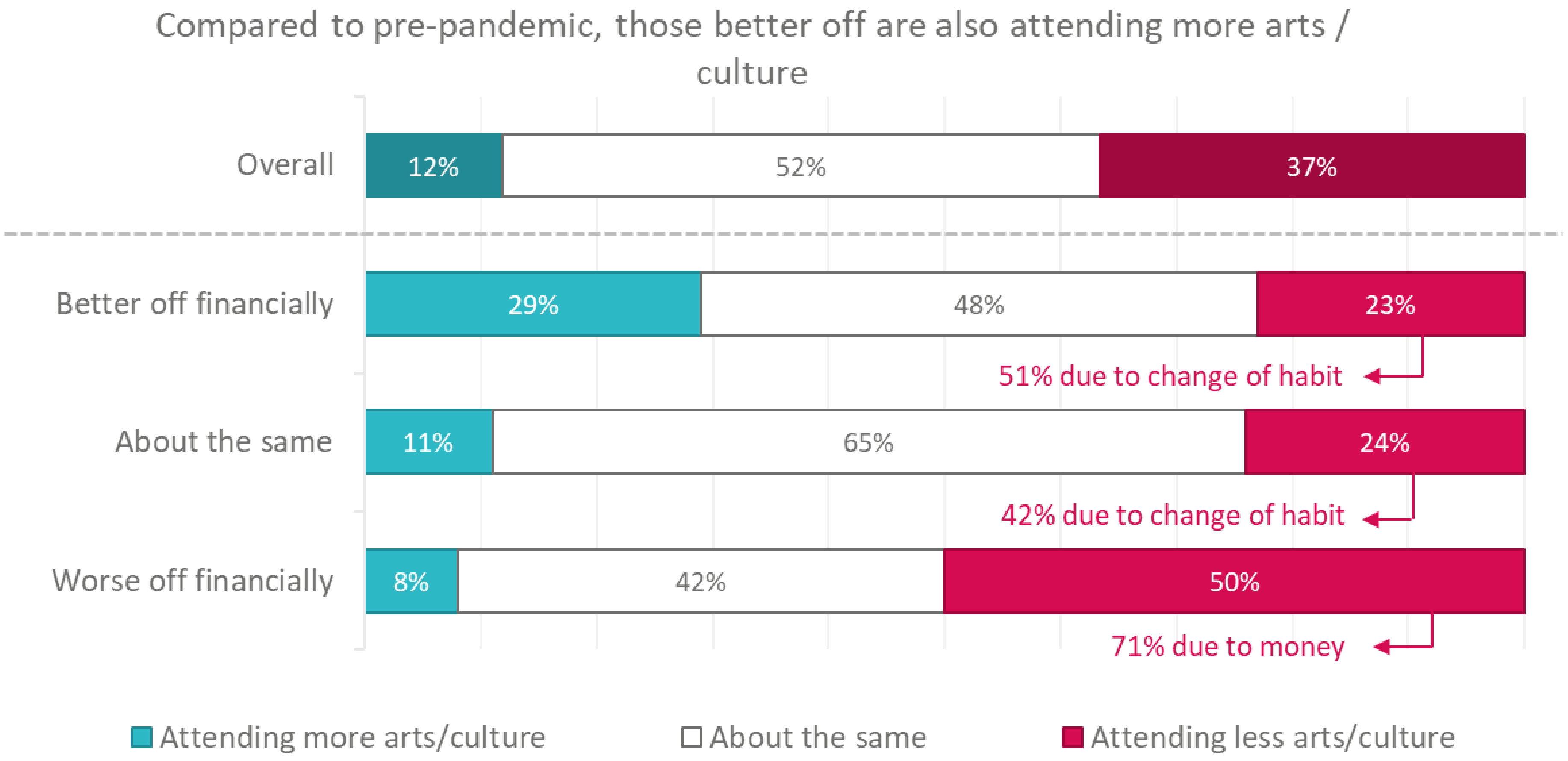
Perceived risk of catching/spreading Covid continues to drop



10%

now think the risk of catching/spreading Covid is high/very high

Barriers to Attendance



48%

feel financially worse-off than last year: and 50% of them are attending less arts/culture

Attitudes to Covid

- Around 1/5 to 1/4 of the population are still significantly concerned about Covid
- It does still affect attendance

(36% of the 31% who are attending less than 12 months ago said Covid put them off)

- More cautious re Covid are more likely to be 65+, disabled, with higher education, better off (esp. better off families), not working outside the home.

24% are put off attending arts & culture by Covid

Attitudes re Covid:

Strongly agree or agree (Strongly agree)

- Chance of getting or passing on Covid during day-to-day activities: low/v low 51%; high/v high 10%
- Nervous re public transport b/c of Covid: 27% (8%)
- I wear a mask at indoor events: 22% (7%)
- 'the pandemic is effectively over': 34% (9%)
- Affect in 6 months (33%, 7%) 2 years (20%, 6%)*

* V likely or quite likely, v likely

Cost of Living

- People feel worse off

(47% worse off, 12% better off cf. pre-pandemic)

- It directly affects attendance

(56% of the 31% who are attending less than 12 months ago said it was due to money)

- Those feeling better off are neither attending more nor less (net+0%), those worse off are net 42% less.
- Worse off more likely to be female, 35-64, non-London, disabled, families.

61% are put off attending arts & culture by the cost of living crisis

Attitudes re cost of living:

Strongly agree or agree (Strongly agree)

- Worried about cost of living: 78% (33%) [Oct: 86%]

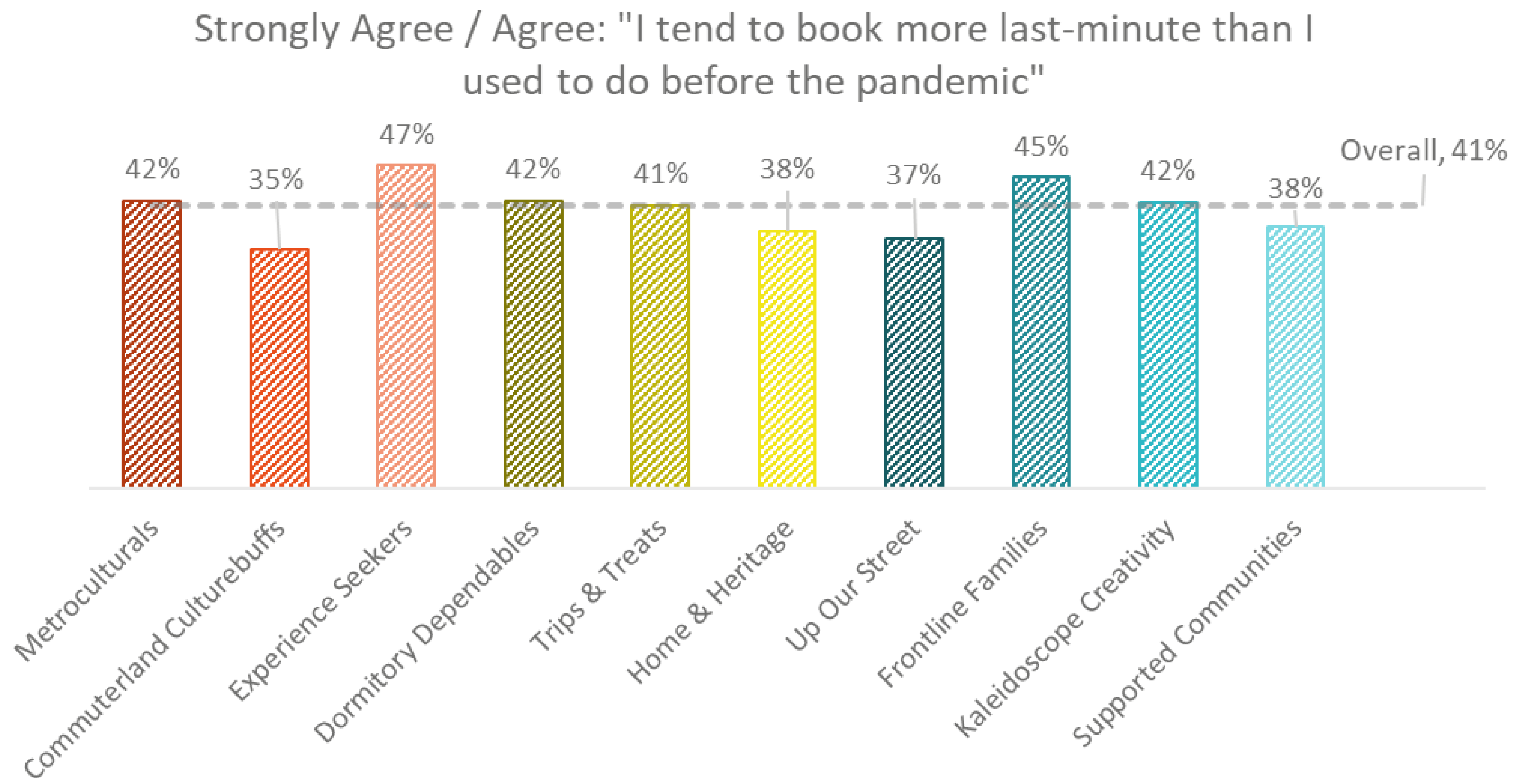
The 'cost of living crisis' means I will…

- …Do fewer paid-for leisure activities: 66% (25%)
- …Look for more free leisure activities: 67% (24%)
- …stay closer to home for leisure: 67% (21%)
- Affect in 6 months (77%, 34%) 2 years (58%, 20%)*

* V likely or quite likely, v likely

2. Purchasing and Engagement

Late Booking



4/10

say they are booking later than before the pandemic

True for both those who feel better off and worse off.

Lower for over 65s.

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Initiators / Responders

8%

Initiators:

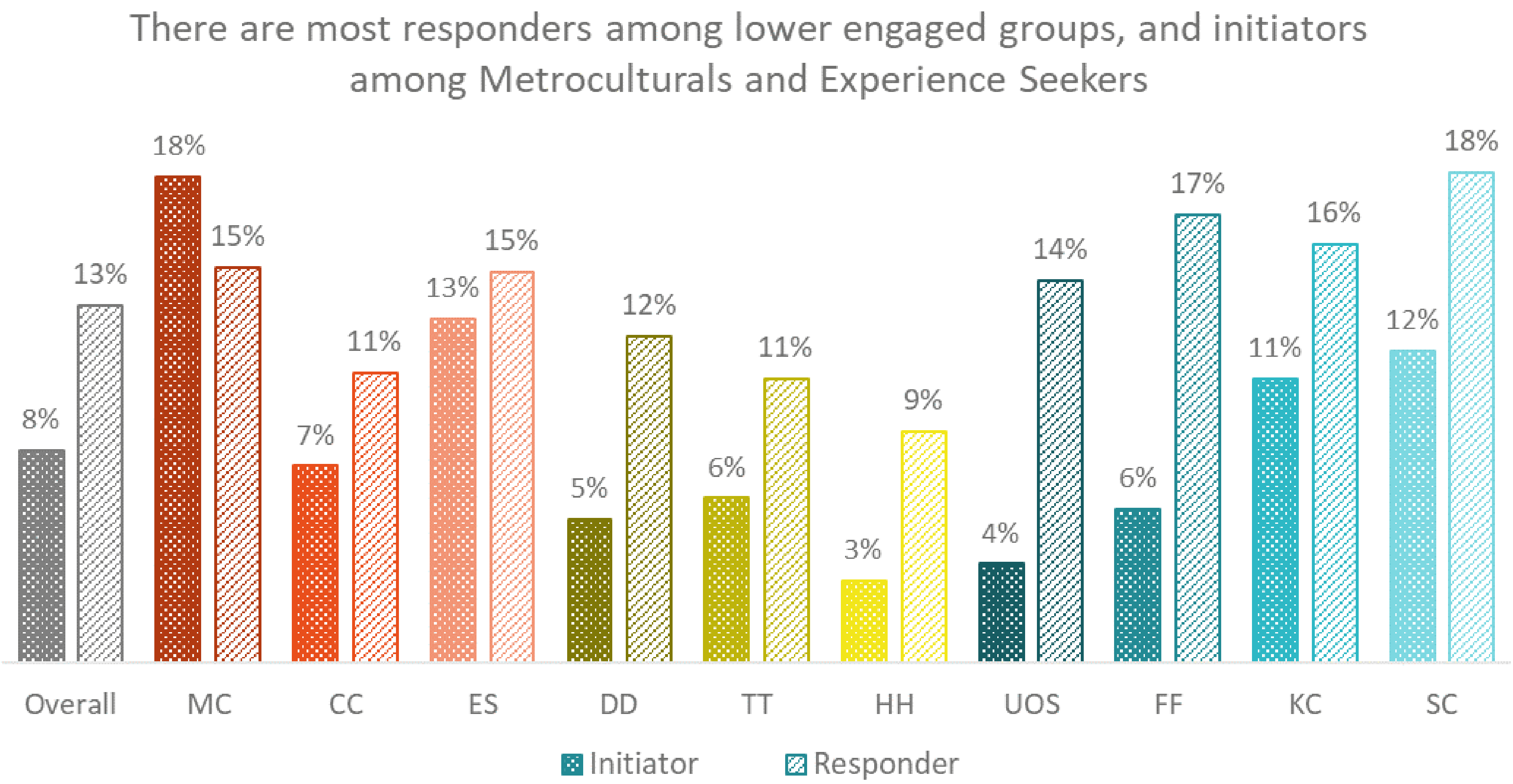
*"I'm the kind of person who **likes to organise** outings to cultural events for my friends"*

13%

Responders:

*"I'm much more likely to attend cultural outings **if someone else invites me**"*

Initiators / Responders



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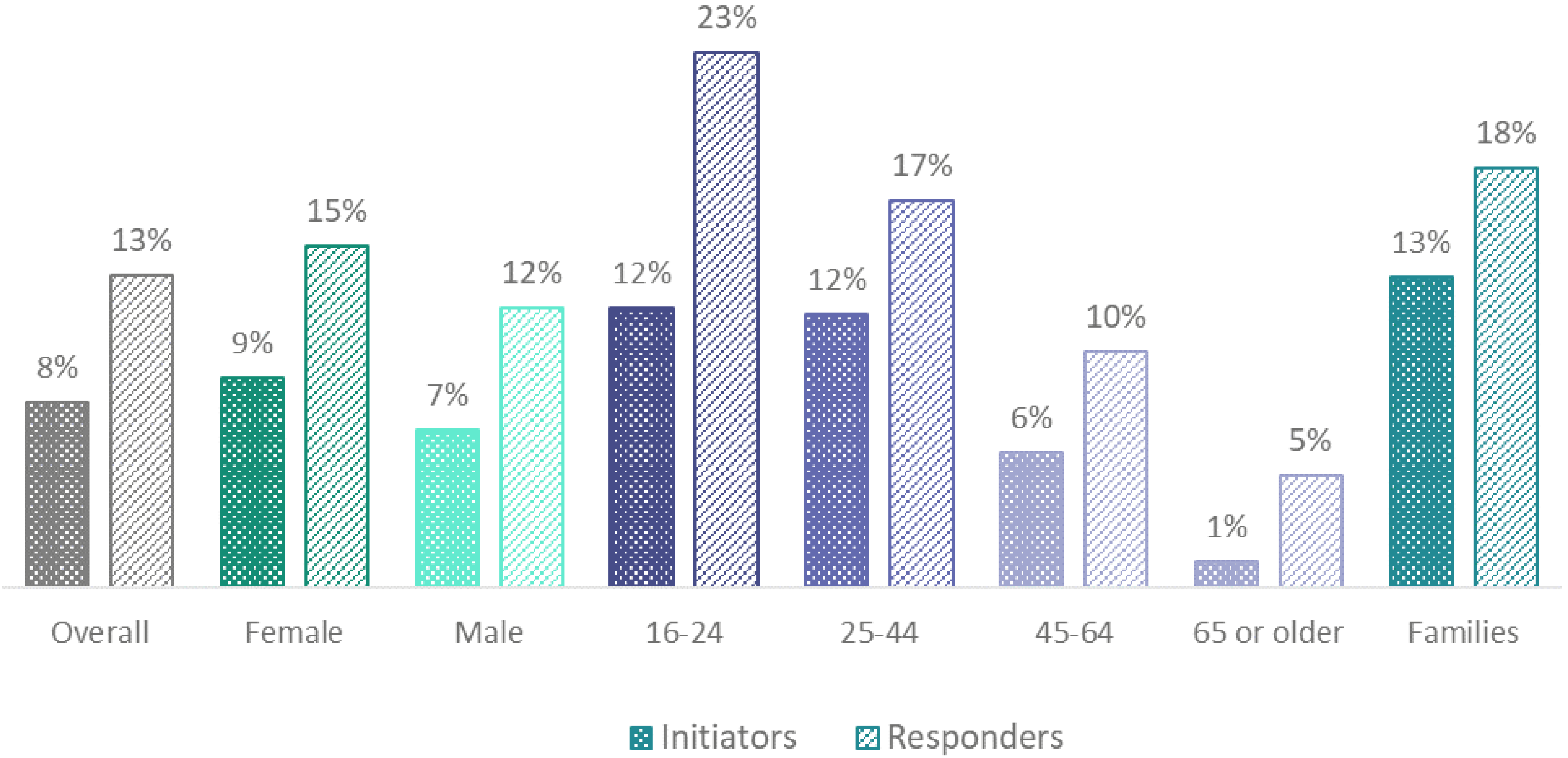
Initiators / Responders

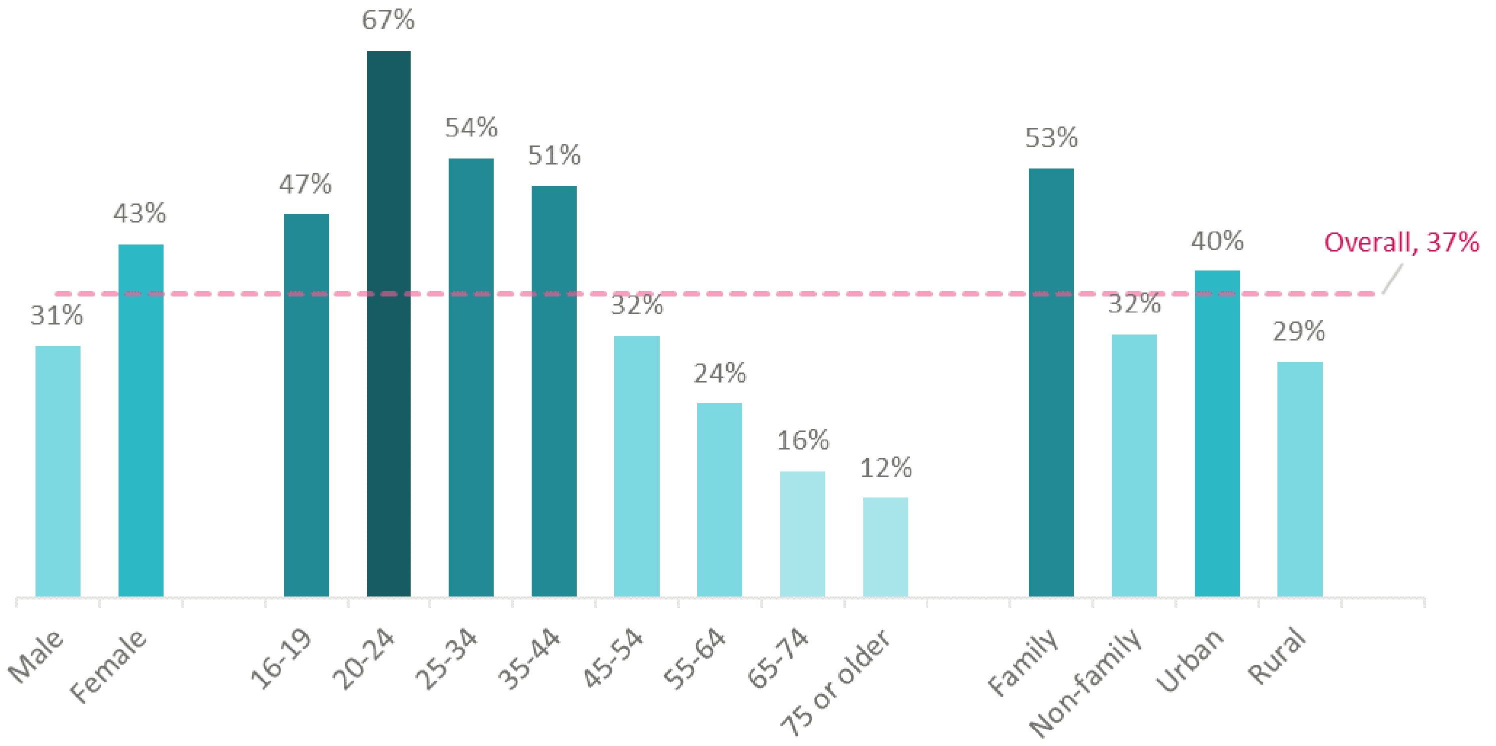


3. Social Media

Use of social media to follow arts & culture organisations

Younger age groups and families were most likely to follow culture / arts organisations on social media

% following any arts or cultural organisations on social media



37%

Follow arts and cultural organisations on social media

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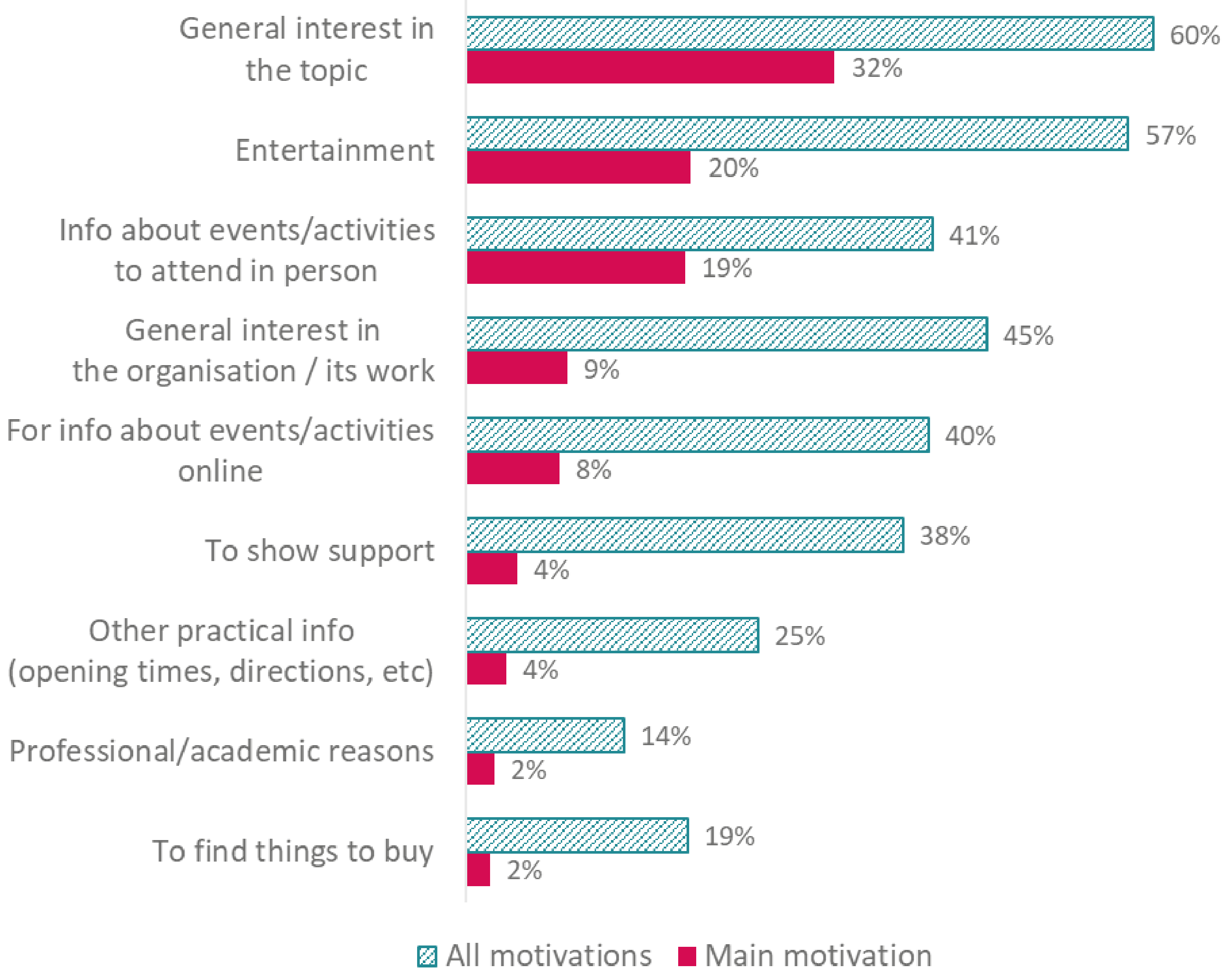
Use of social media to follow arts & culture organisations

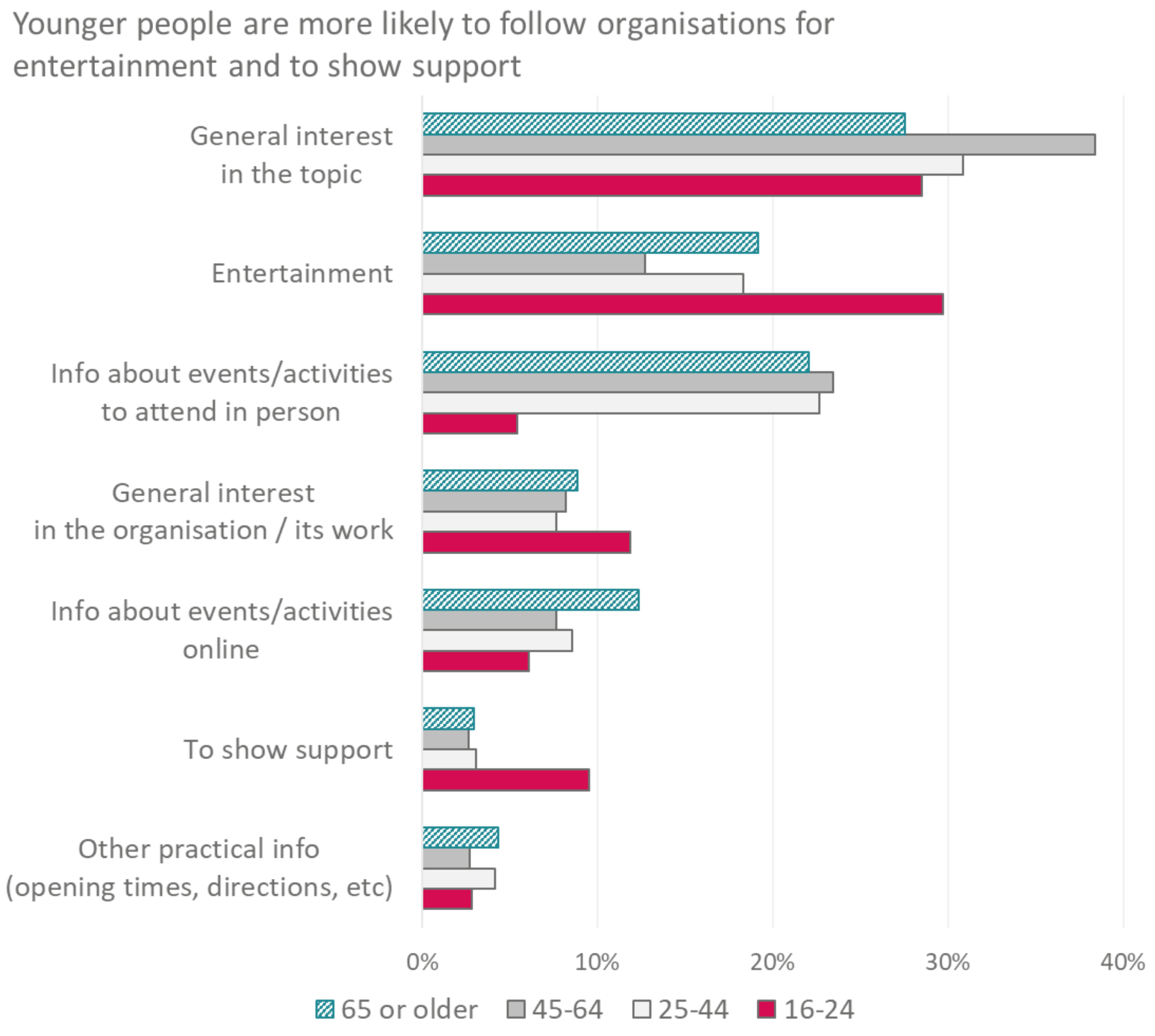
Top motivations for following were general interest in the topic and entertainment



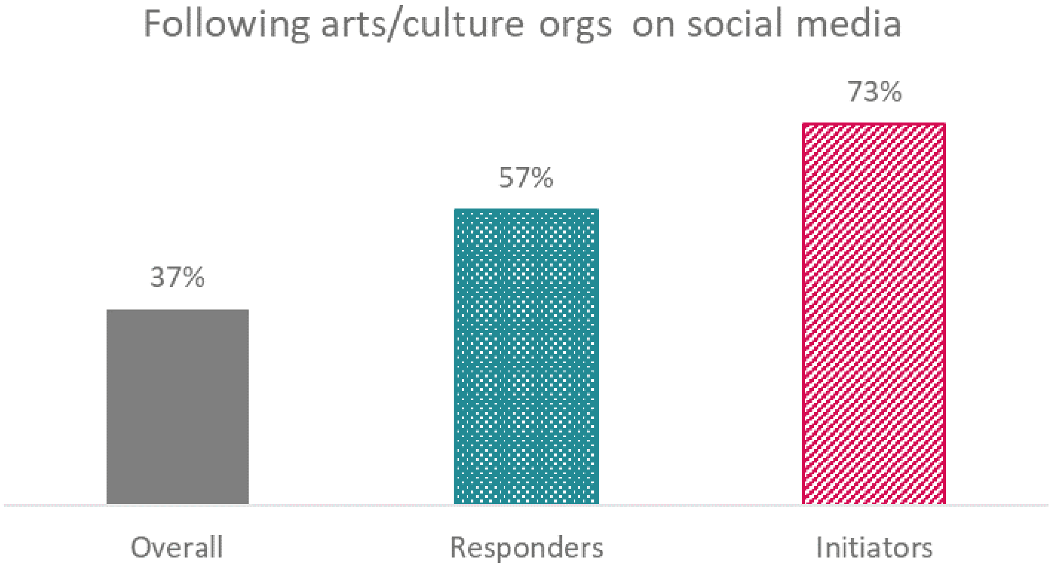
Use of social media to follow arts & culture organisations

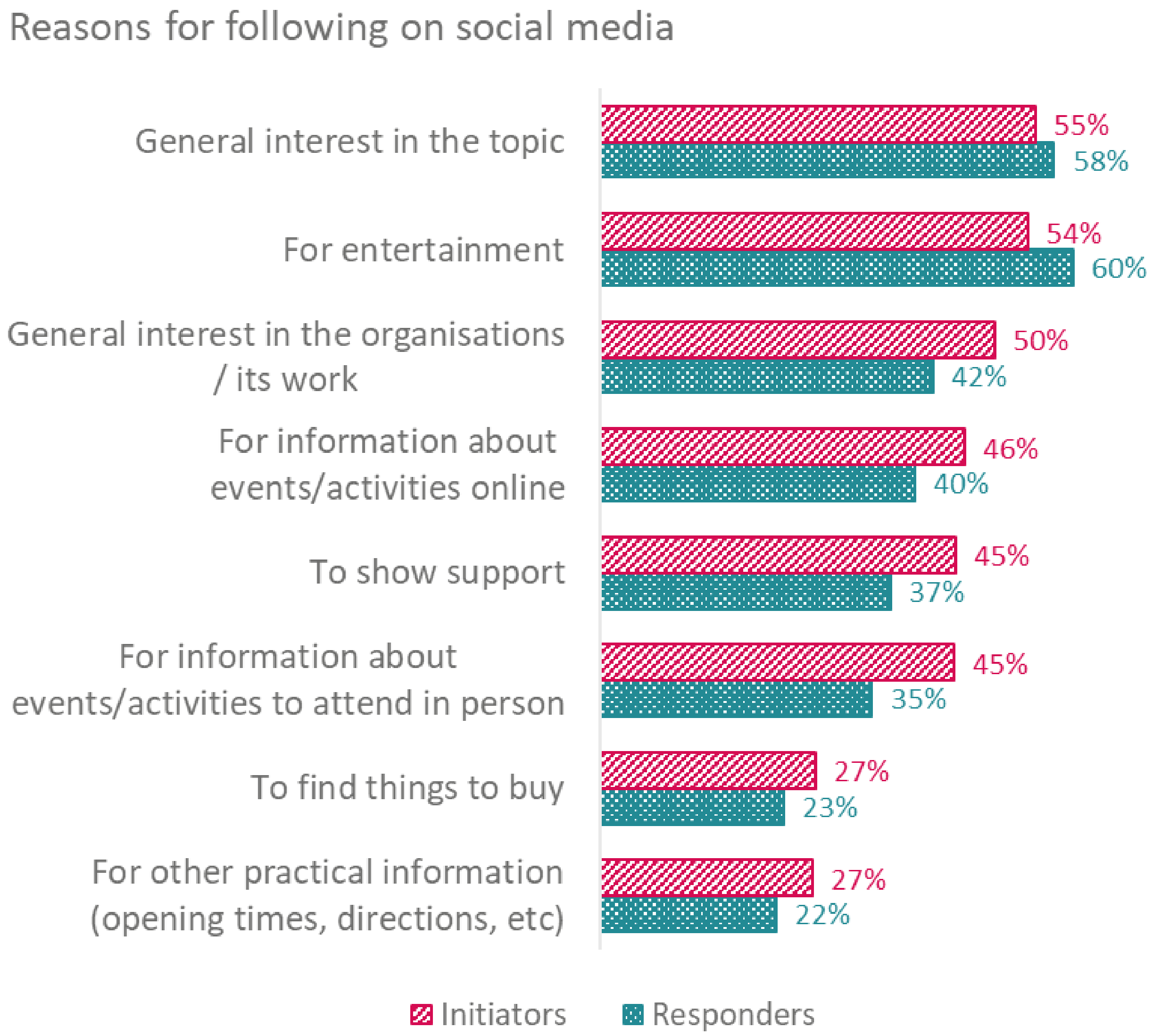
Those who say arts & culture is a main interest of theirs:

- More likely to say general interest in topic is their main reason for following (but not org)
- Less likely to say entertainment



Initiators / Responders





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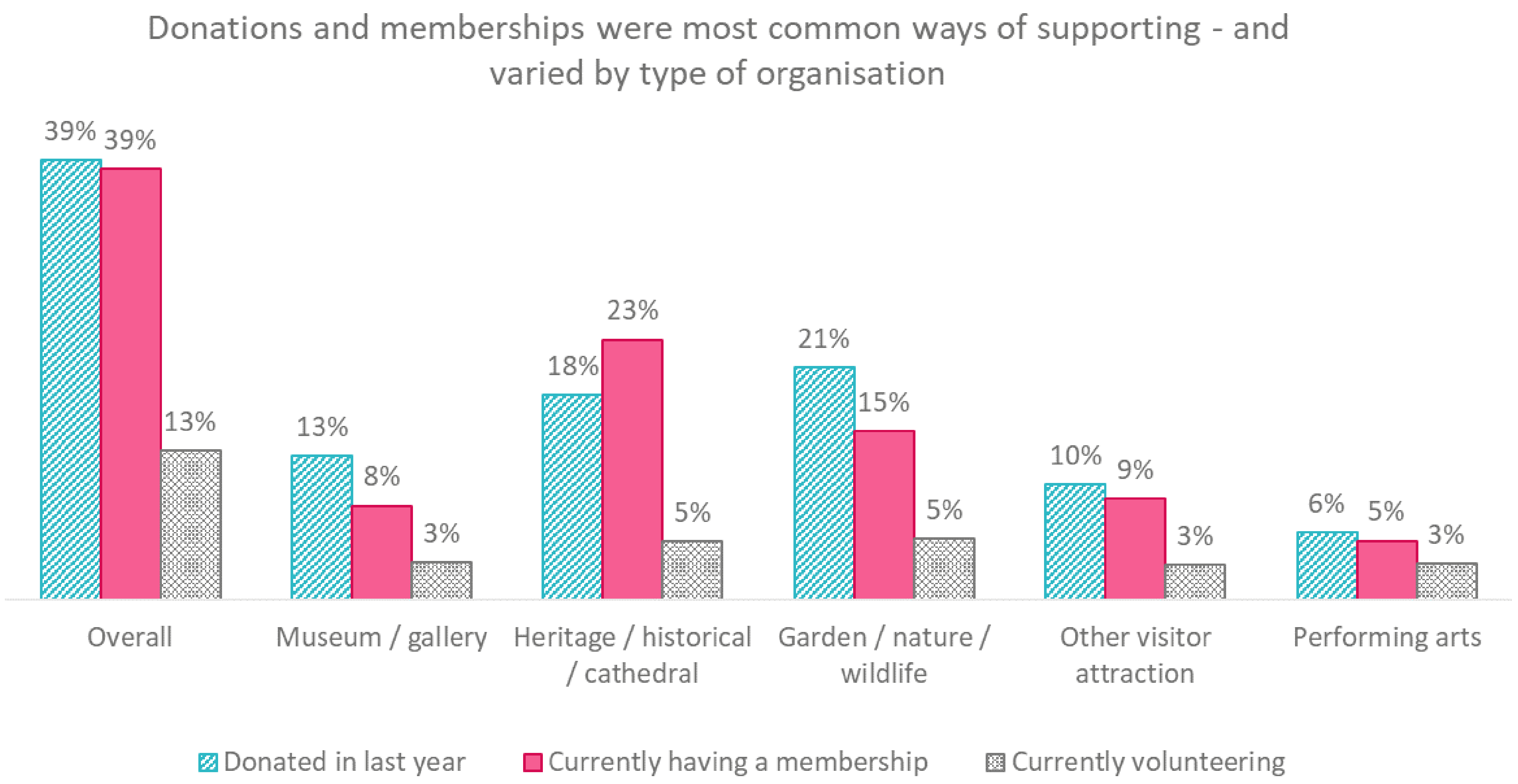
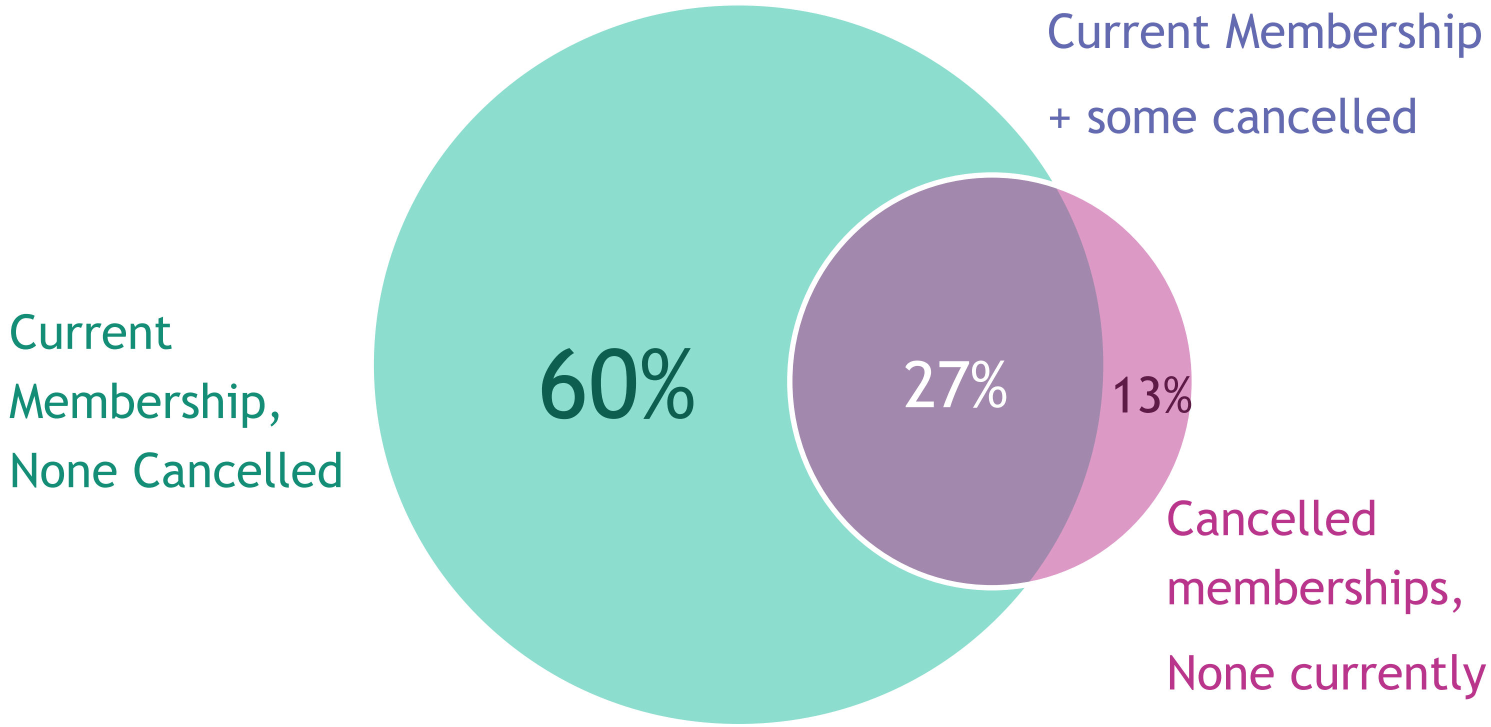
4. Support for Organisations

Types of support



Memberships (45% of population)



Current Membership
Renew Definitely 47%

Current Membership
Renew Probably 41%

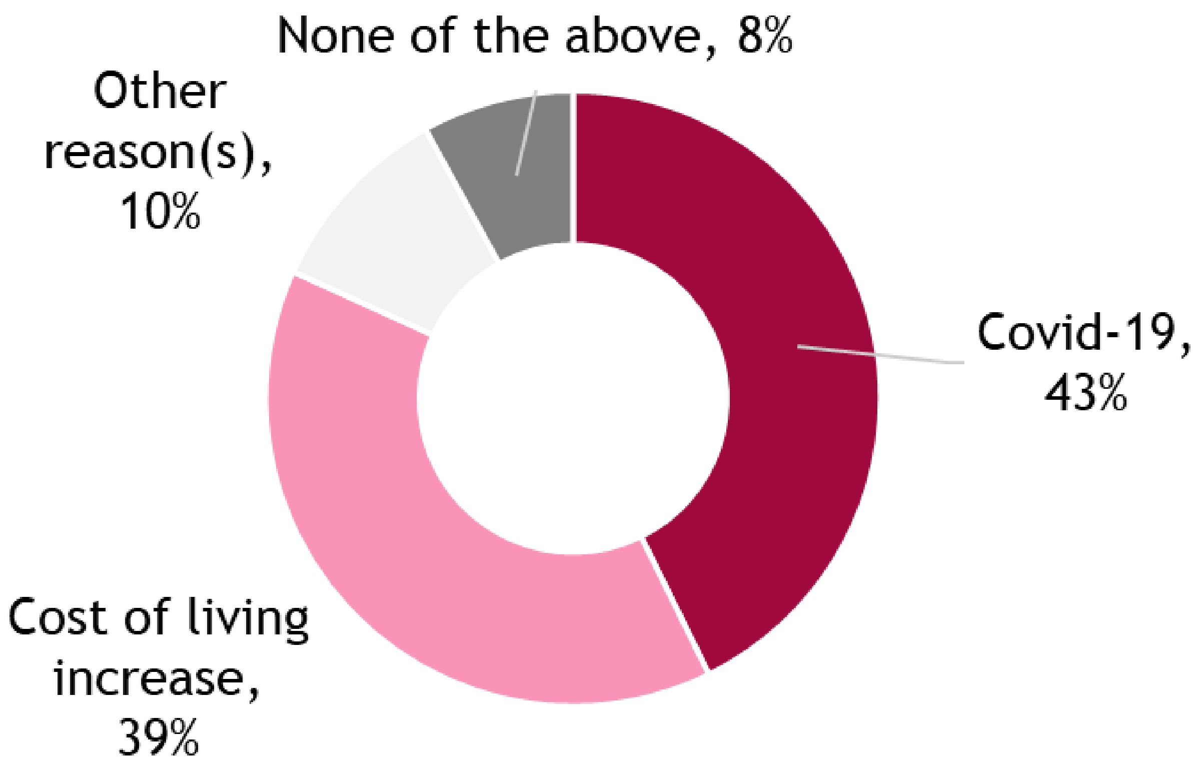
Current Membership
Renew Prob Not / Def Not / DK 12%

Cancelled Membership
Restart Definitiely 24%

Cancelled Membership
Restart Probably 38%

Cancelled Membership
Restart Prob Not/ Def Not / DK 38%

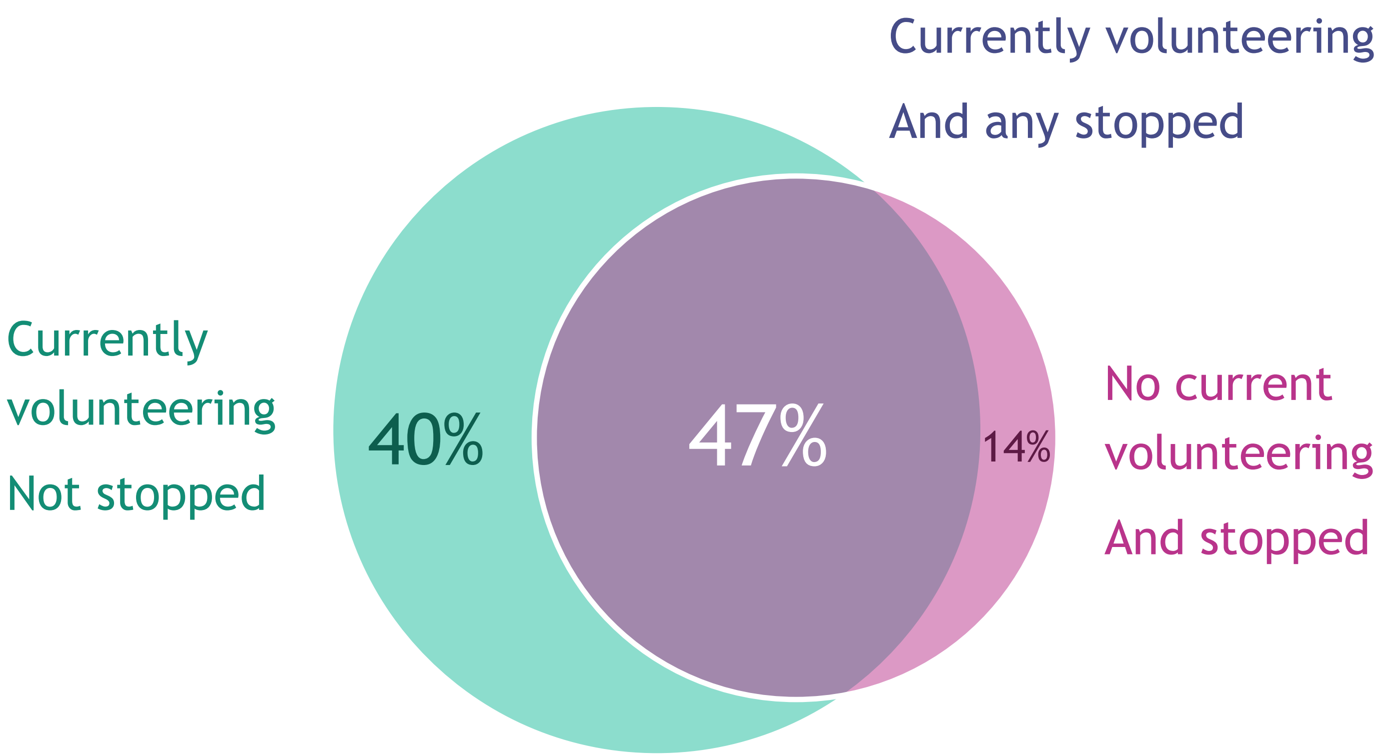
Memberships: Why stopped



- ‘Covid’ skews younger (U45s)
- ‘Cost of living’ is highest among middle-aged

NB: Small samples

Volunteering (15% of population)



Currently volunteering
Continue Def 43%

Currently volunteering
Continue Prob 39%

Currently volunteering
Continue Prob Not / Def Not / DK 17%

Stopped volunteering
Restart Def 30%

Stopped volunteering
Restart Prob 47%

Stopped volunteering
Restart Prob Not/ Def Not / DK 23%

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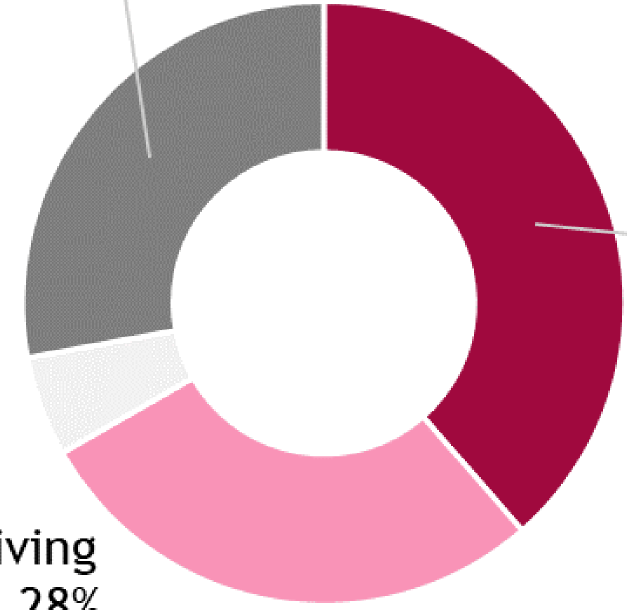
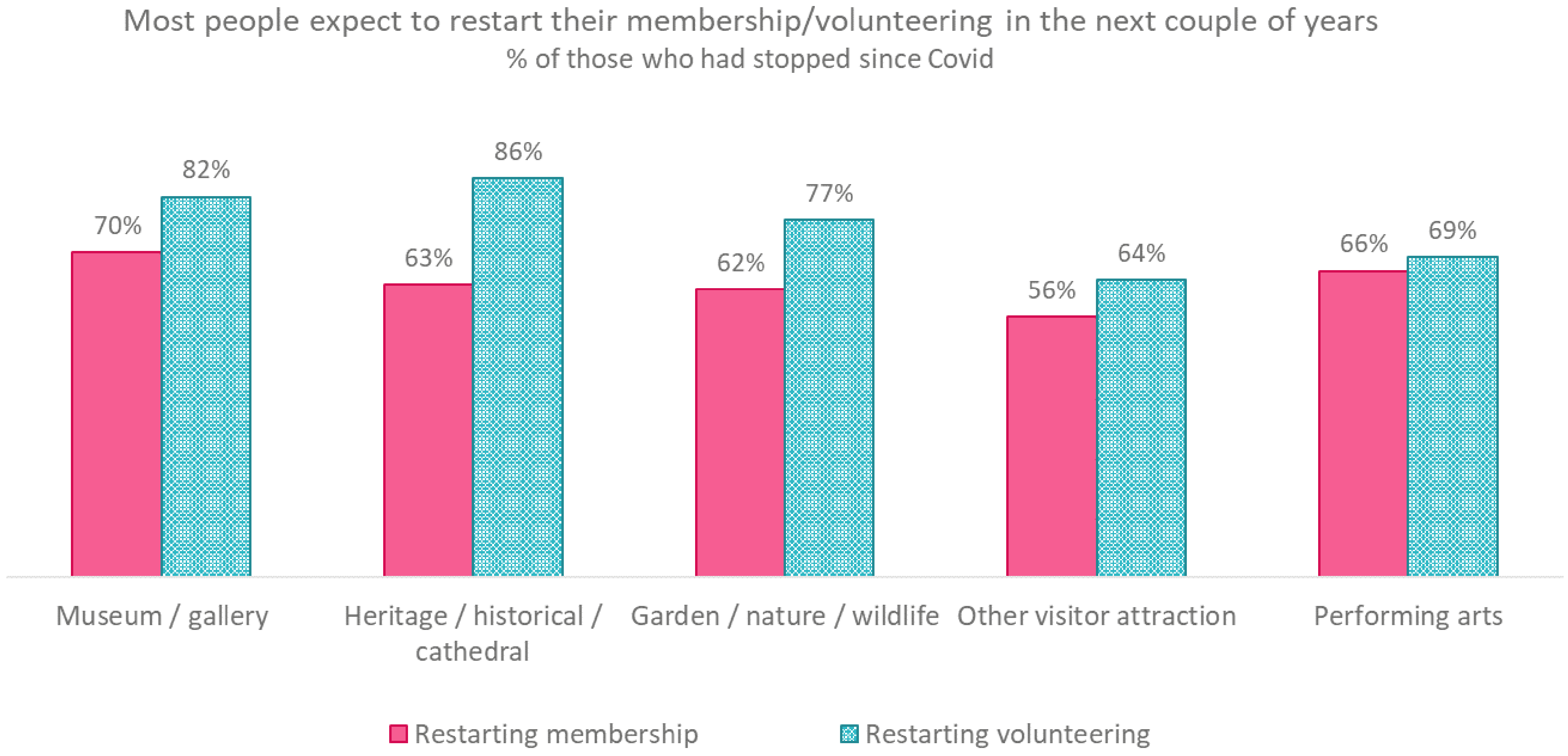
Volunteering: Why stopped



Reason for Attending Less (selected)

There's less I want to see or do	**13%**
I have fewer people to go with	**16%**
I got out of the habit	**22%**
I can't afford it anymore, or want to save money	56%
I have new/greater caring responsibilities	**10%**
I don't have time/energy	**25%**
It's harder to get to the venues	**15%**
I'm trying to avoid falling ill	**18%**
My physical health is worse than it was	**17%**
My mental health is worse than it was	**14%**
Other reason	**5%**
None of the above/ No particular reason	**5%**

Restarting memberships/volunteering



Donations

Almost half say they've donated to a cultural/heritage/nature organisation in the last year (46%):

- nature (21%)
- heritage (18%)
- museum/gallery (13%)
- other attraction (10%)
- performing arts (6%).

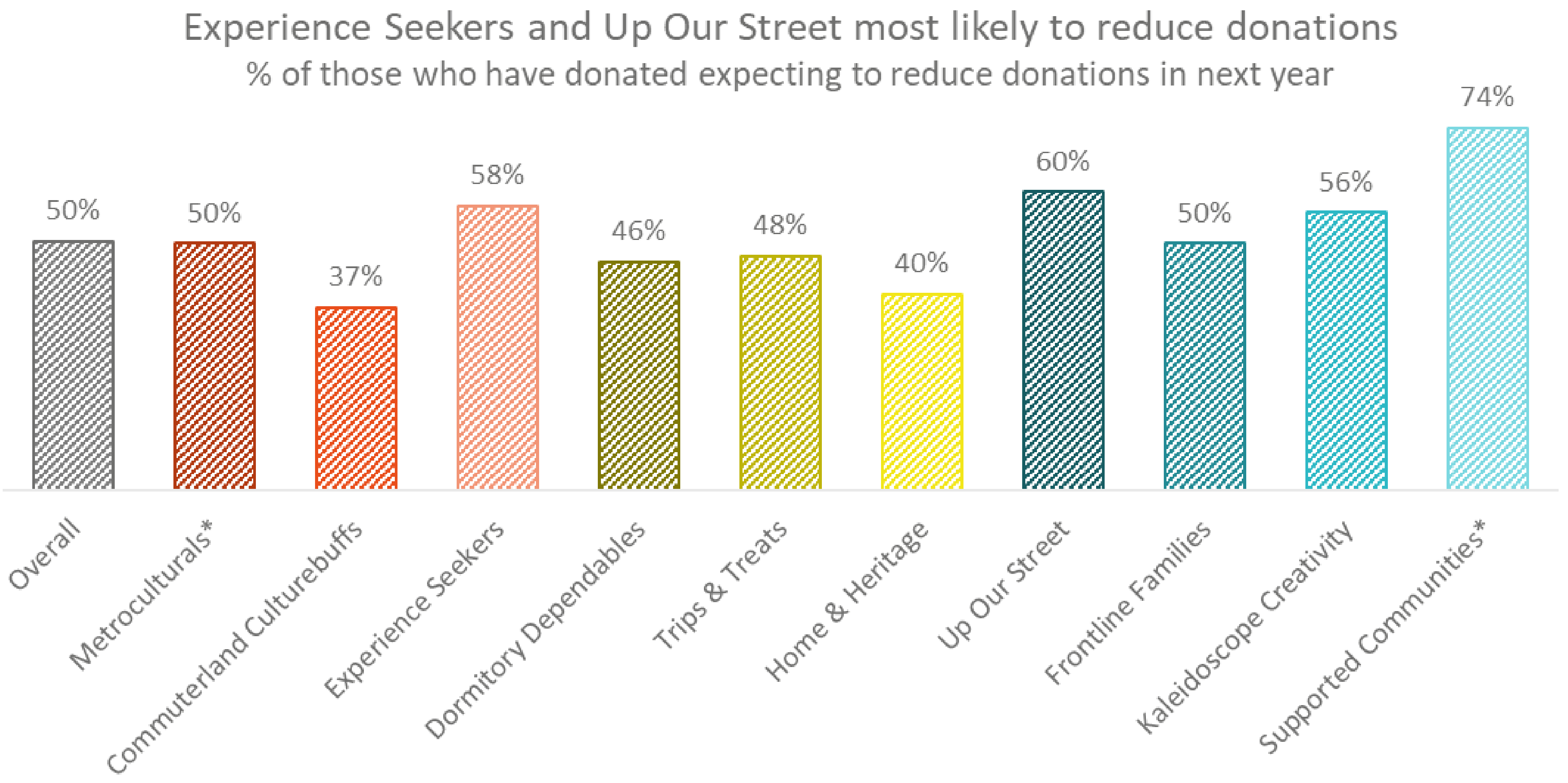
50%

of donors say the cost of living means they will donate less: cf. 17% more.

- Especially: younger (U45s); lower income groups; those with children (even families who feel that they have got better off).

Tension between groups more likely to attend and more likely to support...?

Donations



* low sample size: indicative results only

5. Implications and Discussion

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Implications

- Barriers (Covid not gone away, but cost of living the priority – but 12% ‘better off’ than before Covid, and varies by group)
- Late booking types – better off & less concern / worse off & more concern
- Membership models (and reengagement for memberships and volunteering)
- Donations (differentiate methods re age etc)
- Differentiation in social media audiences (young/lower engaged may look for different things...)
- New normal? (membership/volunteering return and reduced concern re Covid, but cost of living likely to persists)

Thank you

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