

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.

CENTRE FOR CULTURAL VALUE  Arts and Humanities Research Council

Wave 8 was supported by Association of Leading Visitor Attractions

ALVA

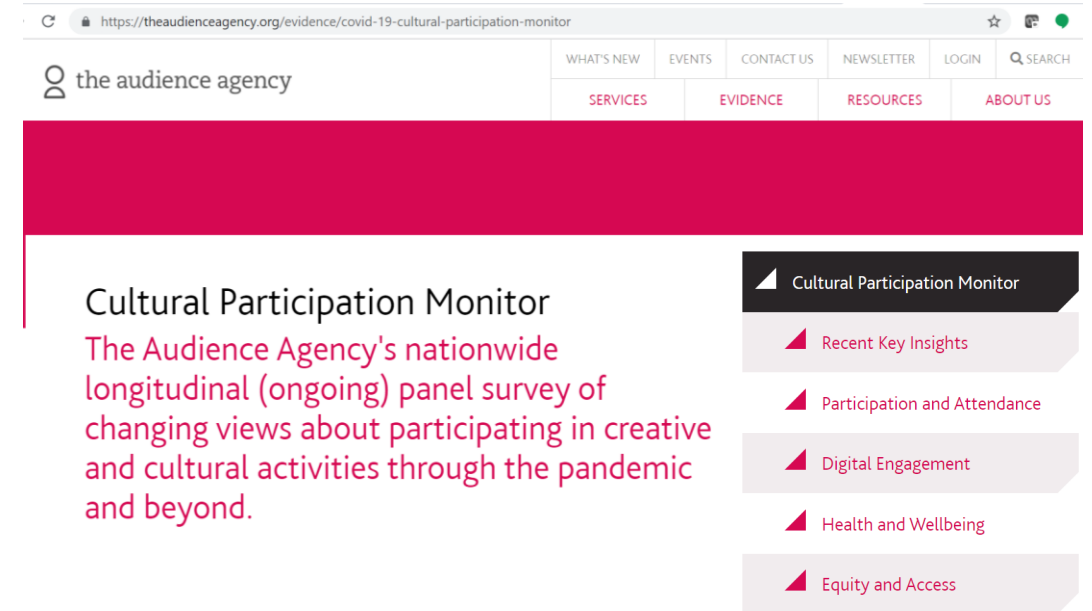
About the Cultural Participation Monitor

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.



The screenshot shows the website for the Cultural Participation Monitor. The URL in the browser is <https://theaudienceagency.org/evidence/covid-19-cultural-participation-monitor>. The page features a navigation menu with links for WHAT'S NEW, EVENTS, CONTACT US, NEWSLETTER, LOGIN, and SEARCH. Below the navigation, there are four main menu items: SERVICES, EVIDENCE, RESOURCES, and ABOUT US. The main content area is titled "Cultural Participation Monitor" and describes it as "The Audience Agency's nationwide longitudinal (ongoing) panel survey of changing views about participating in creative and cultural activities through the pandemic and beyond." To the right of the main text is a vertical sidebar with a dark header "Cultural Participation Monitor" and five menu items: "Recent Key Insights", "Participation and Attendance", "Digital Engagement", "Health and Wellbeing", and "Equity and Access".

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



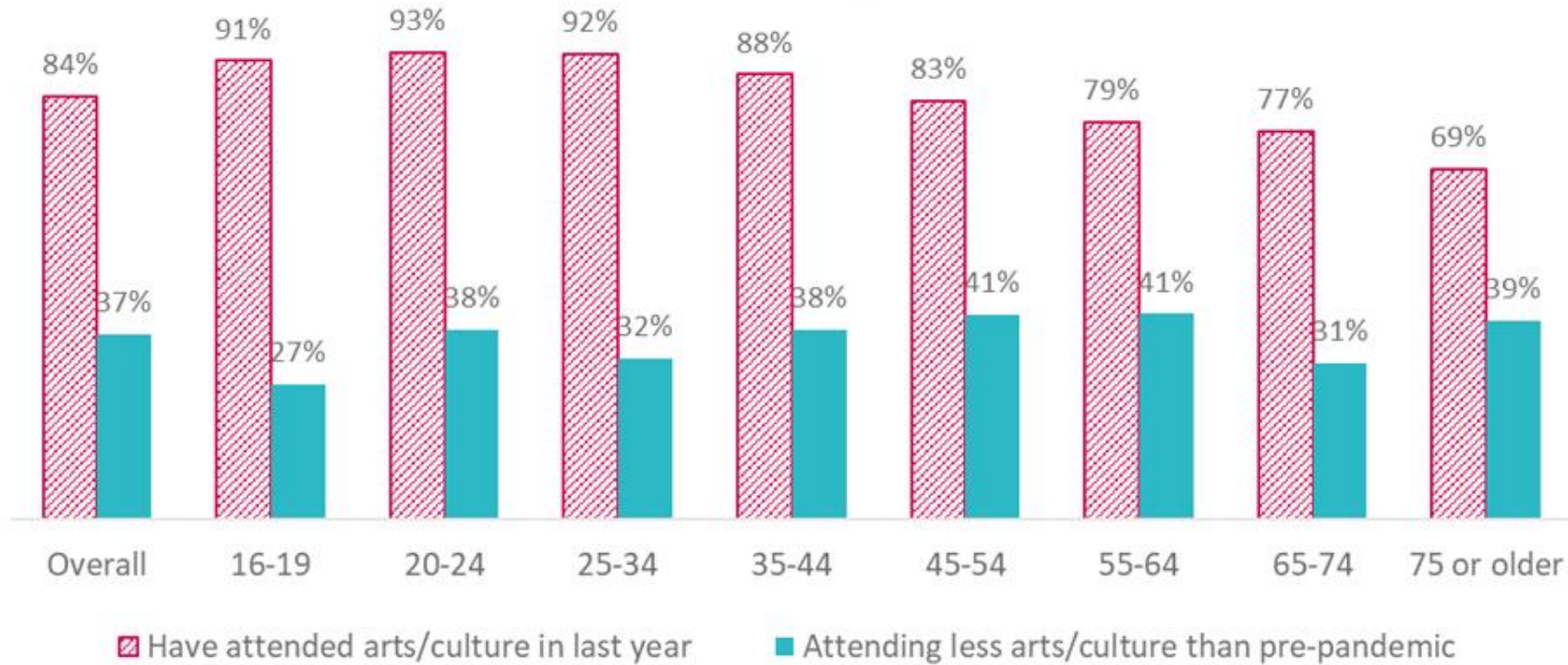
- Donations



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

Attendance

Young people **attend more**, but across the board about a third of people report attending **less than they did before** the pandemic

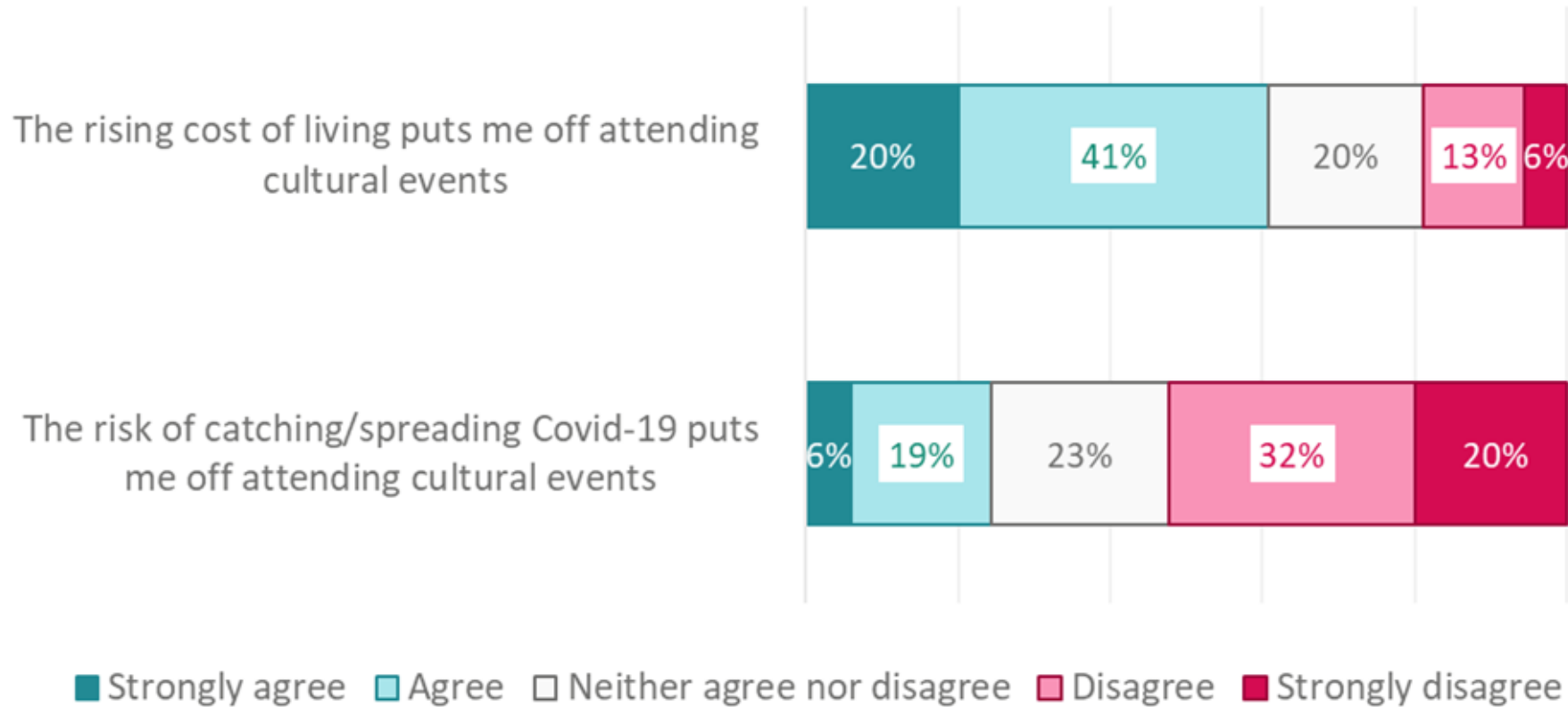


84%

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

Down since Wave 7: 90%

Barriers to Attendance

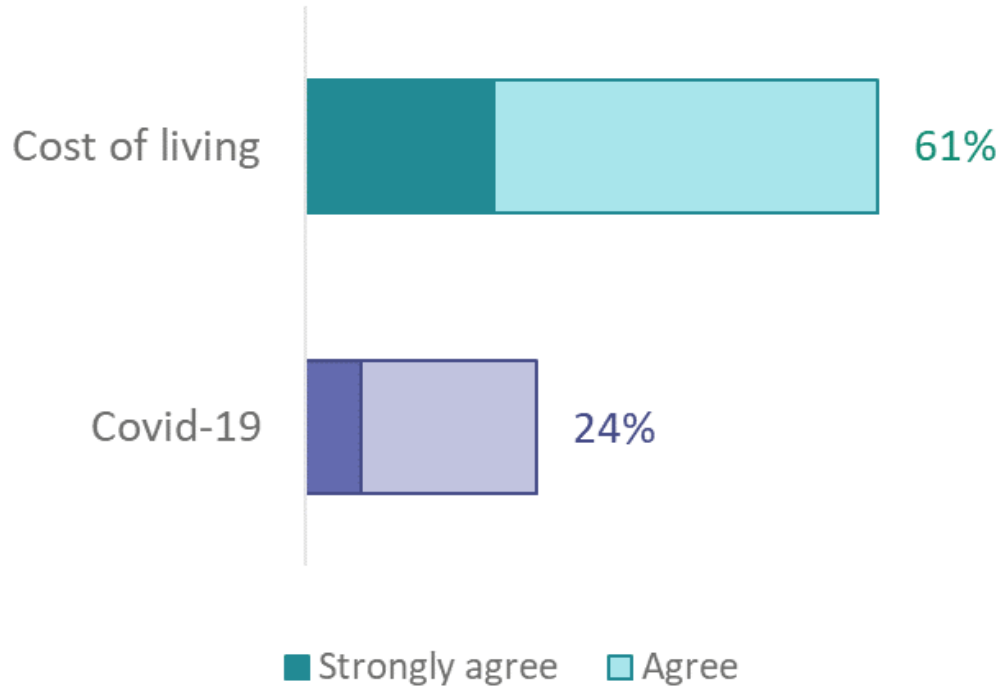


61%

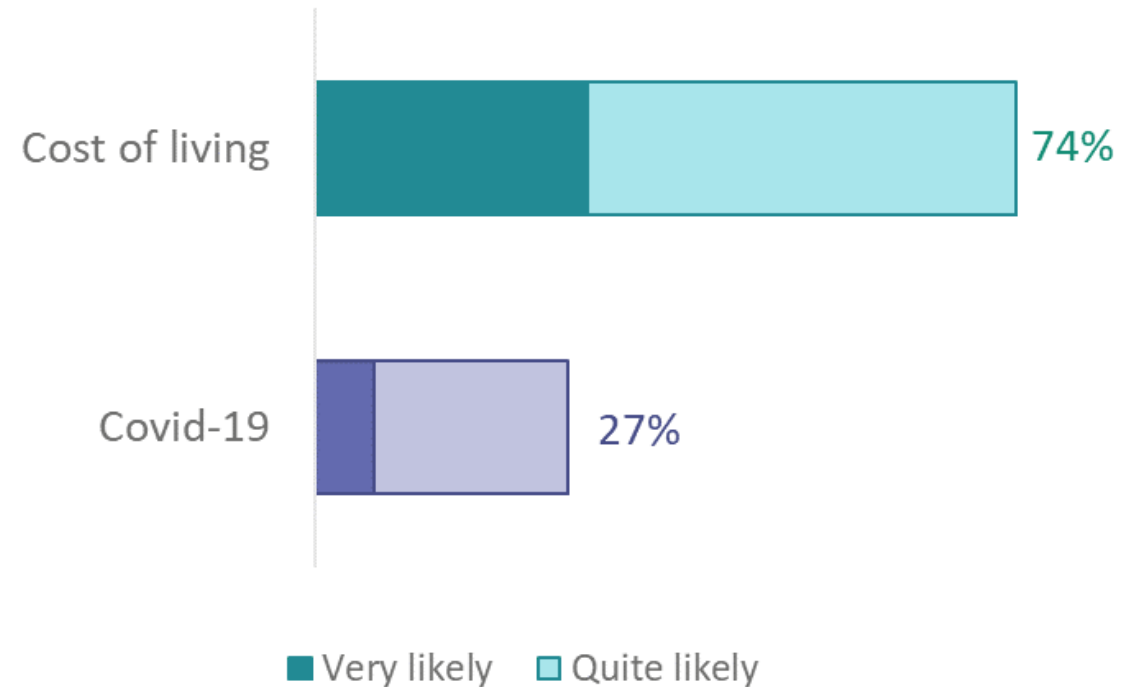
say that the **cost of living** puts them off attending cultural events: cf. 24% for Covid.

Barriers to Attendance

"...Puts Me Off Attending Cultural Events"

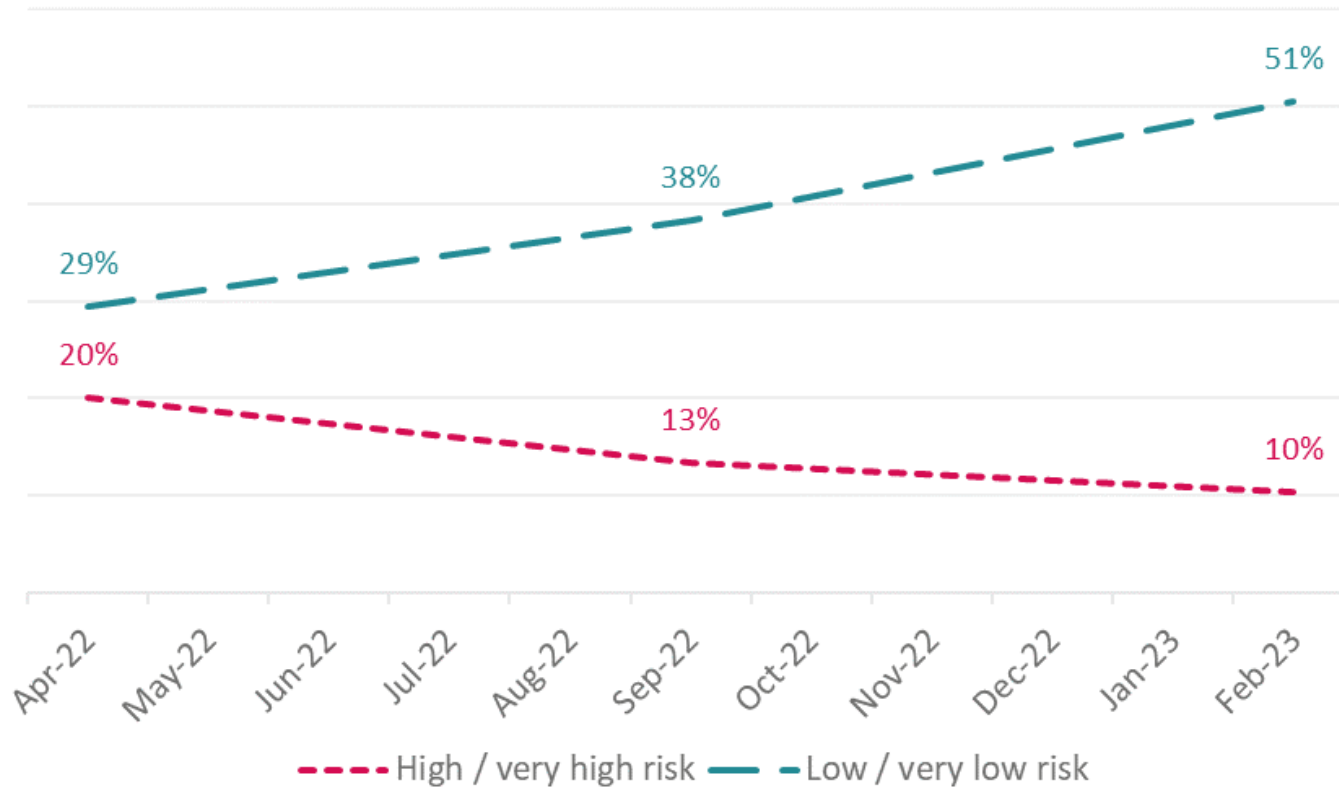


"... Will Impact My Life in a Year's Time"



Attitudes to Covid

Perceived risk of catching/spreading Covid continues to drop

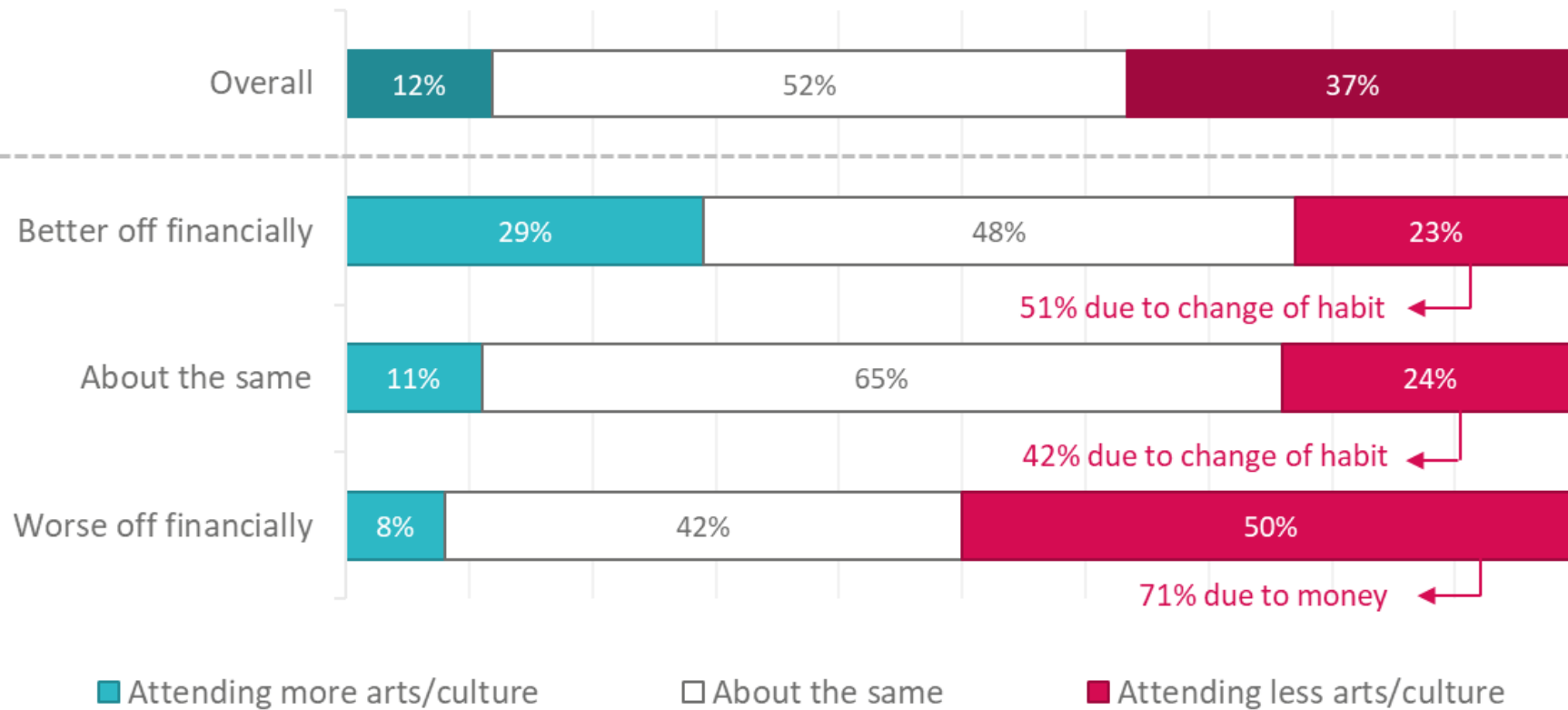


10%

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

Barriers to Attendance

Compared to pre-pandemic, those better off are also attending more arts / culture



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...

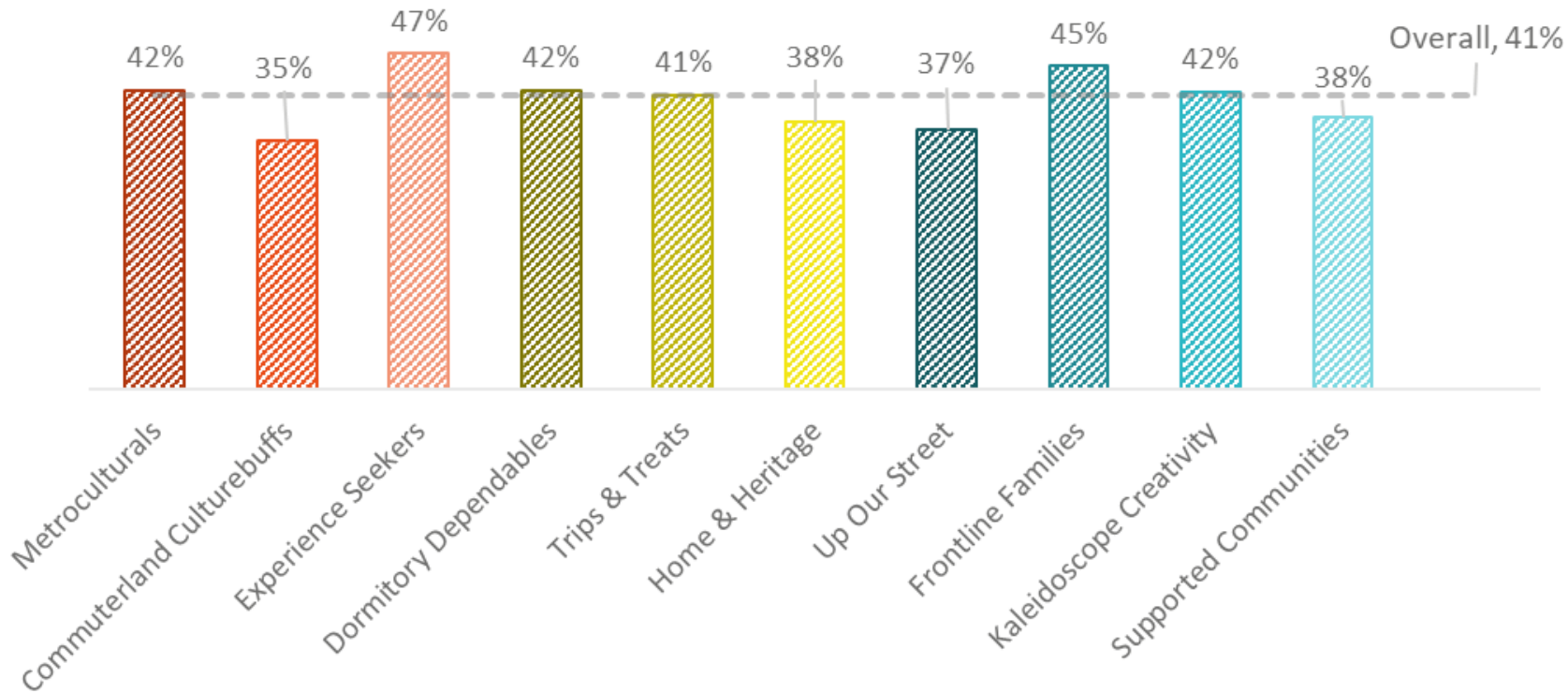
- ...Do fewer paid-for leisure activities: **66%** (25%)
- ...Look for more free leisure activities: **67%** (24%)
- ...stay closer to home for leisure: **67%** (21%)
- Affect in 6 months (**77%**, 34%) 2 years (**58%**, 20%)*

* V likely or quite likely, v likely

2. Purchasing and Engagement

Late Booking

Strongly Agree / Agree: "I tend to book more last-minute than I used to do before the pandemic"



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.

Initiators / Responders

8%

Initiators:

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

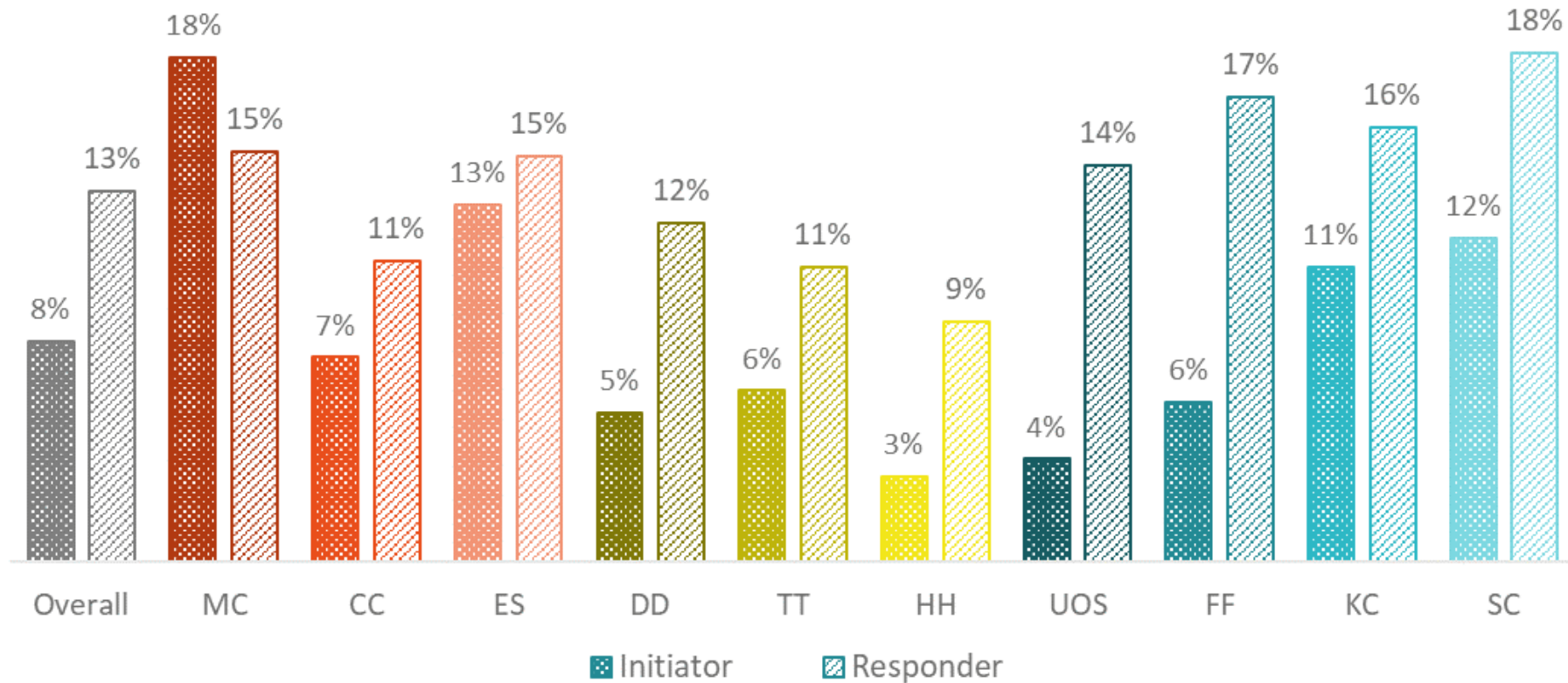
13%

Responders:

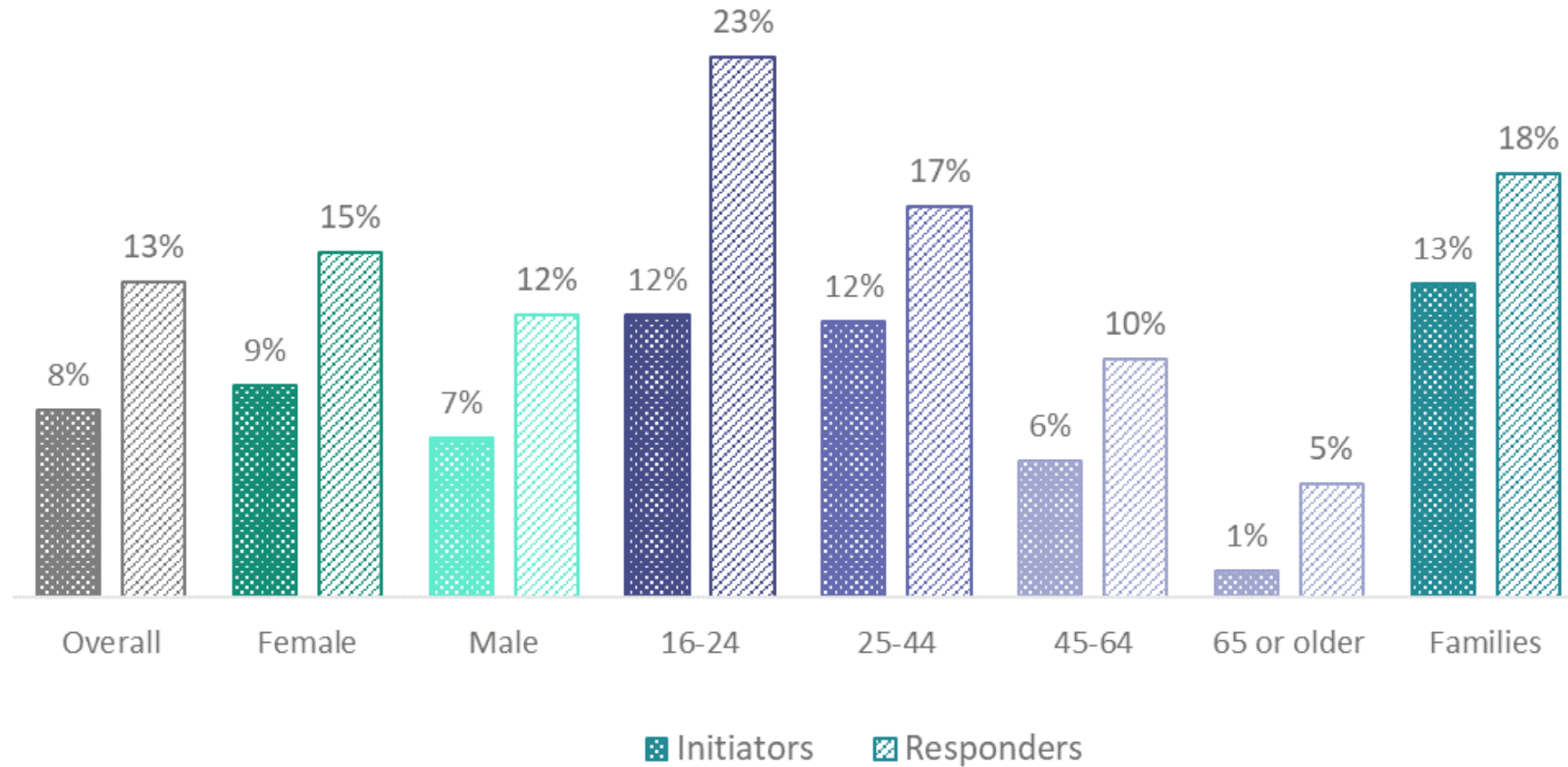
"I'm much more likely to attend cultural outings if someone else invites me"

Initiators / Responders

There are most responders among lower engaged groups, and initiators among Metroculturals and Experience Seekers



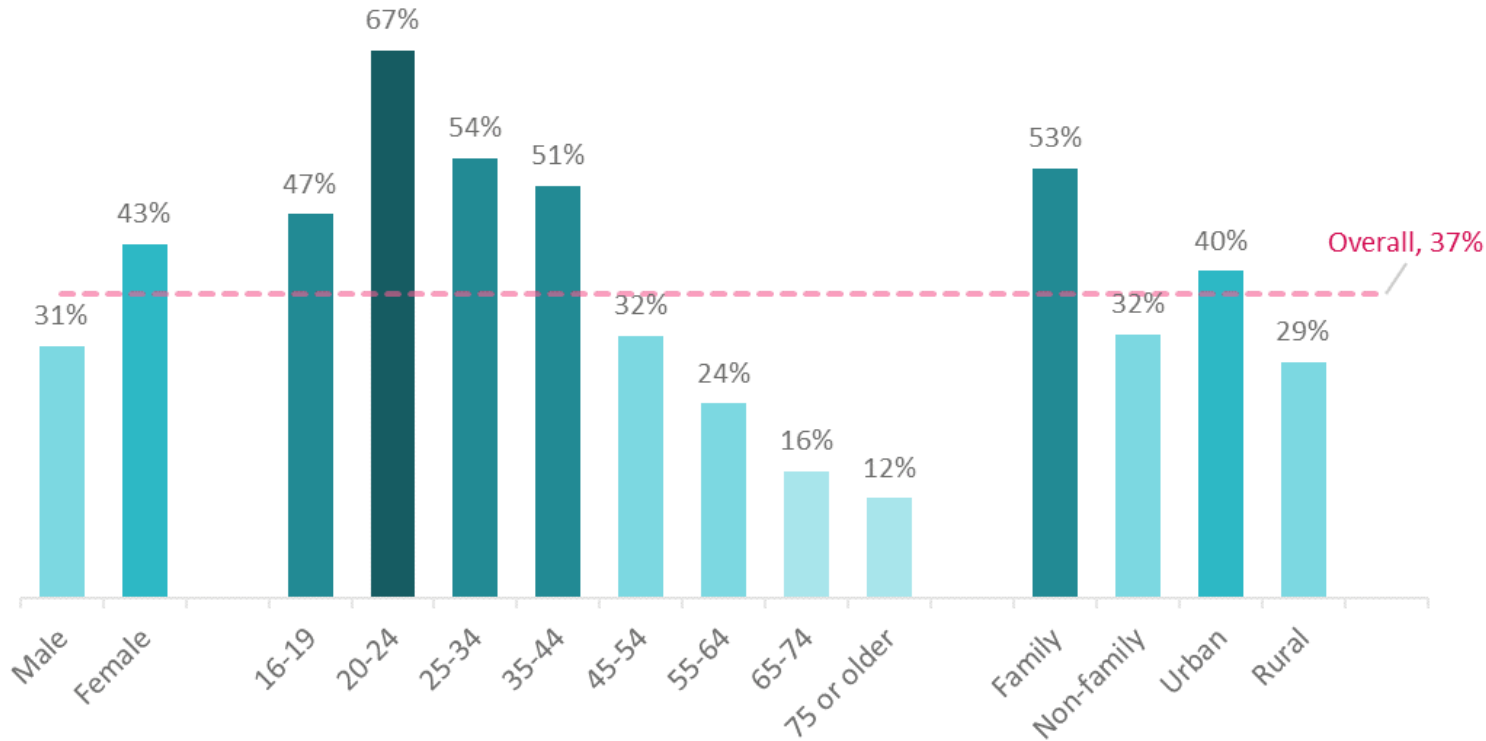
Initiators / Responders



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

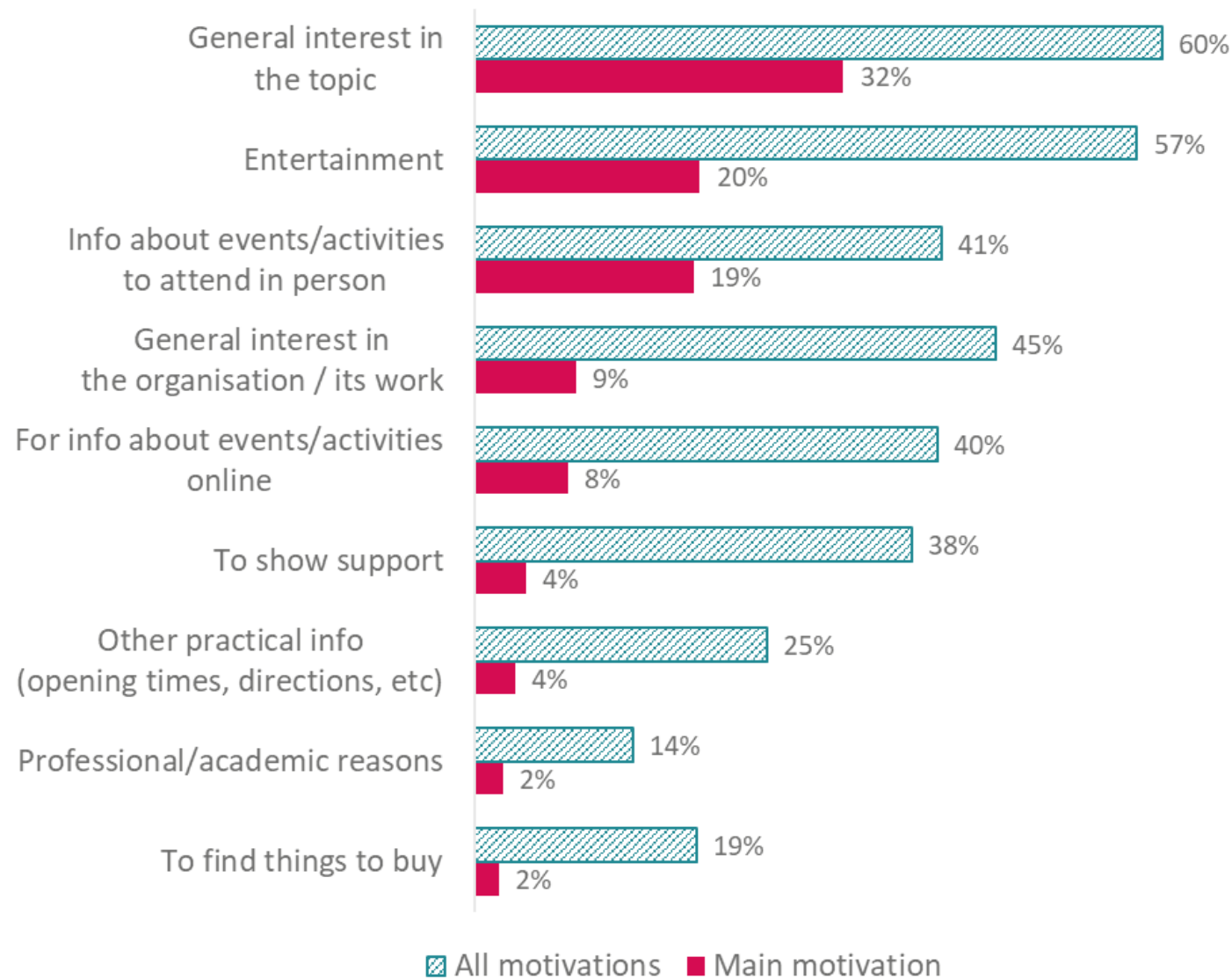


37%

Follow arts and cultural organisations on social media

Use of social media to follow arts & culture organisations

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

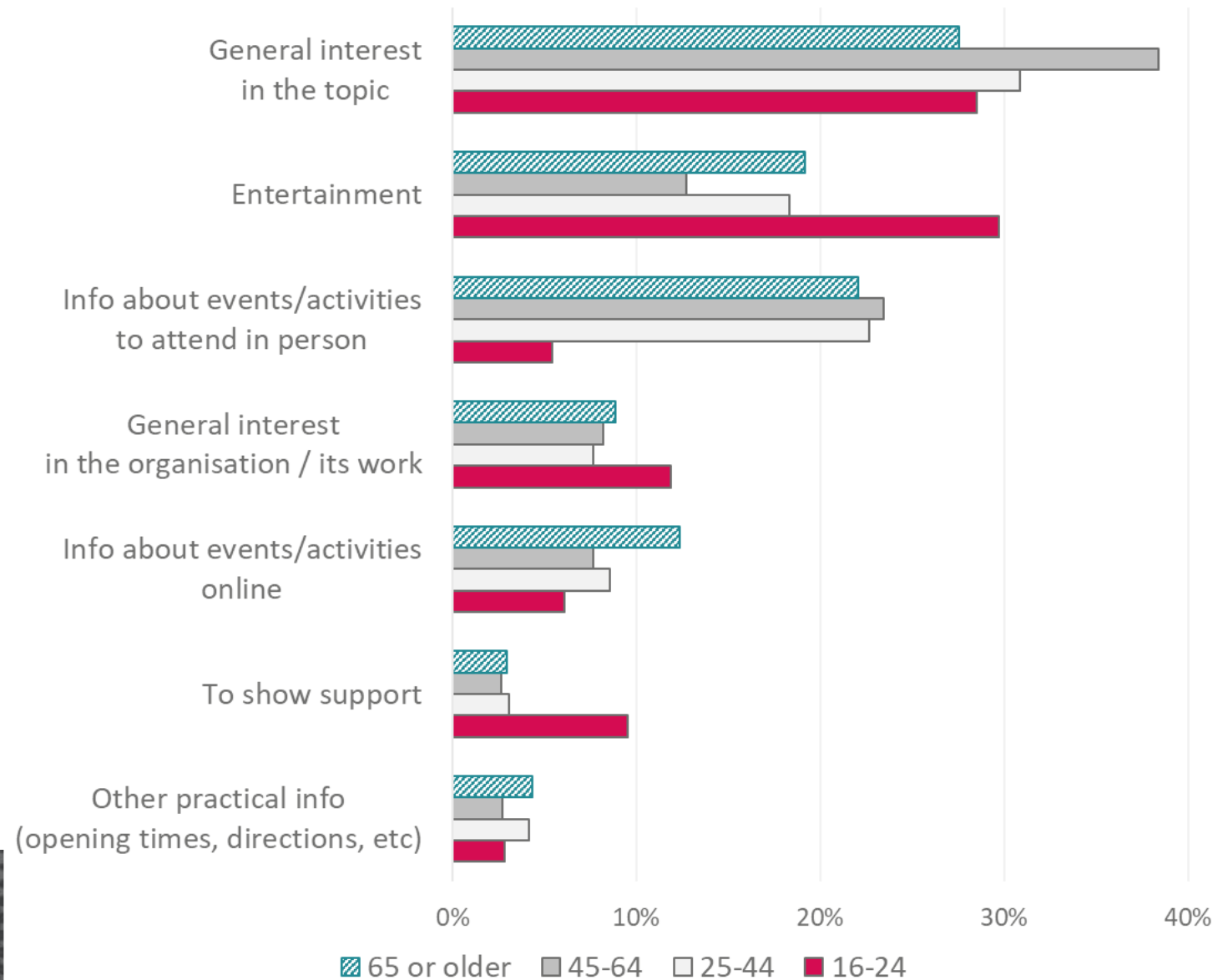


Use of social media to follow arts & culture organisations

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

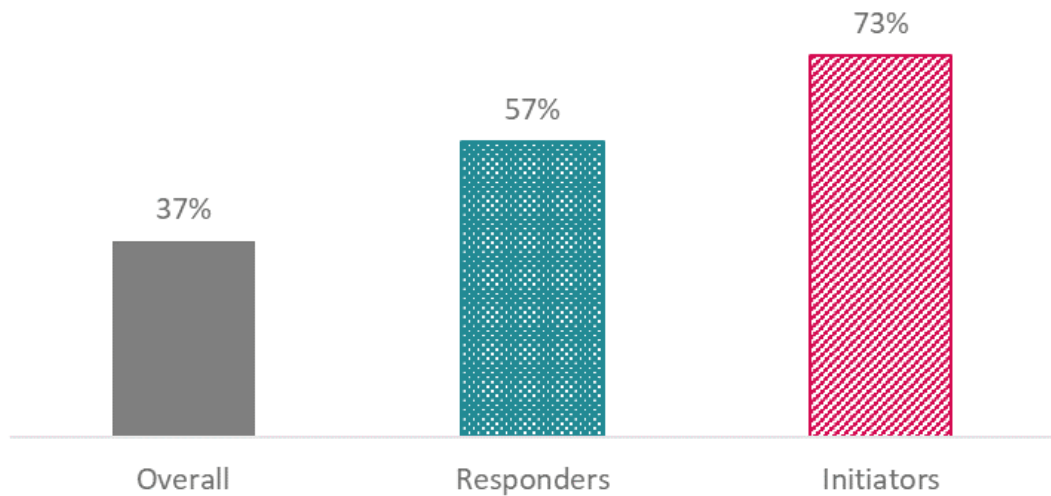
- **More likely** to say general interest in topic is their main reason for following (but not org)
- **Less likely** to say entertainment

Younger people are more likely to follow organisations for entertainment and to show support

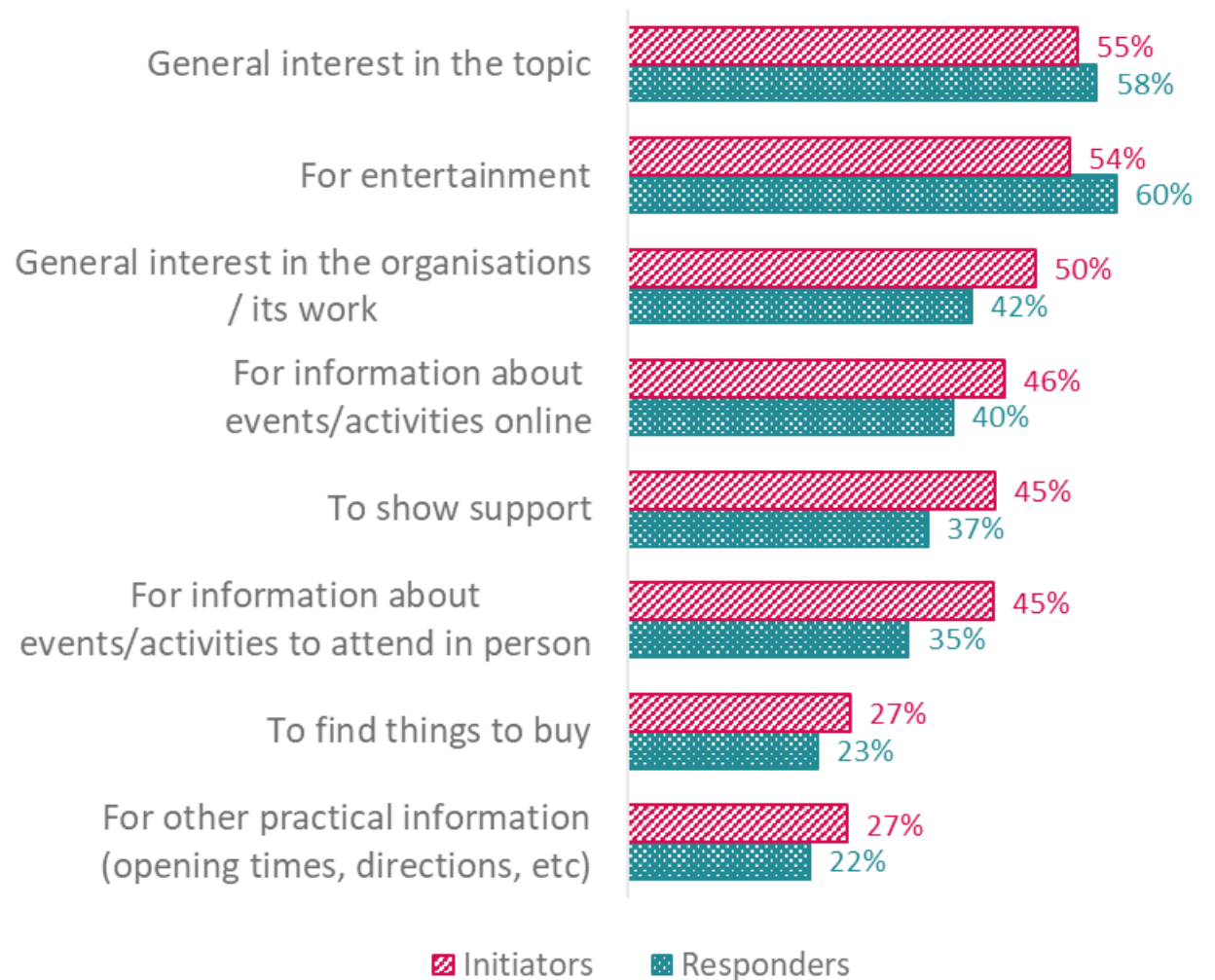


Initiators / Responders

Following arts/culture orgs on social media



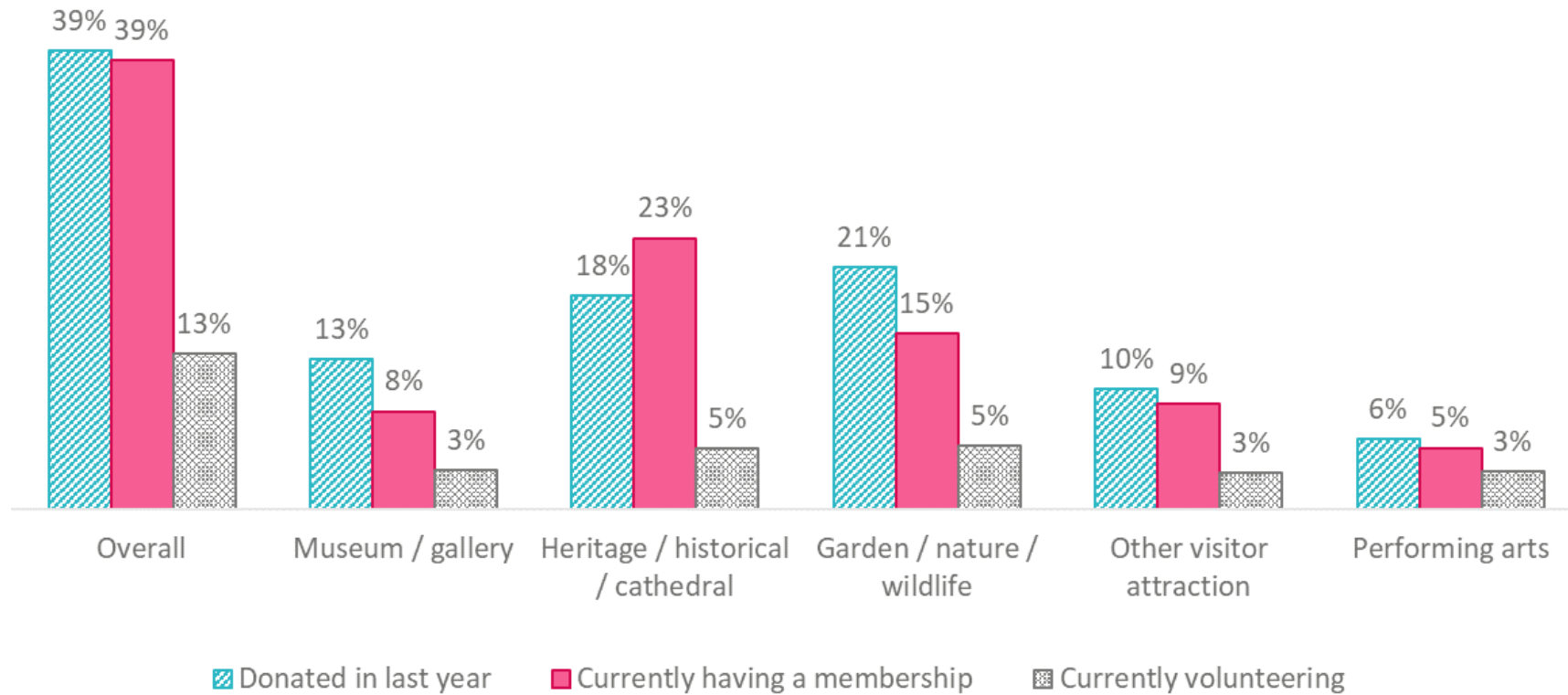
Reasons for following on social media



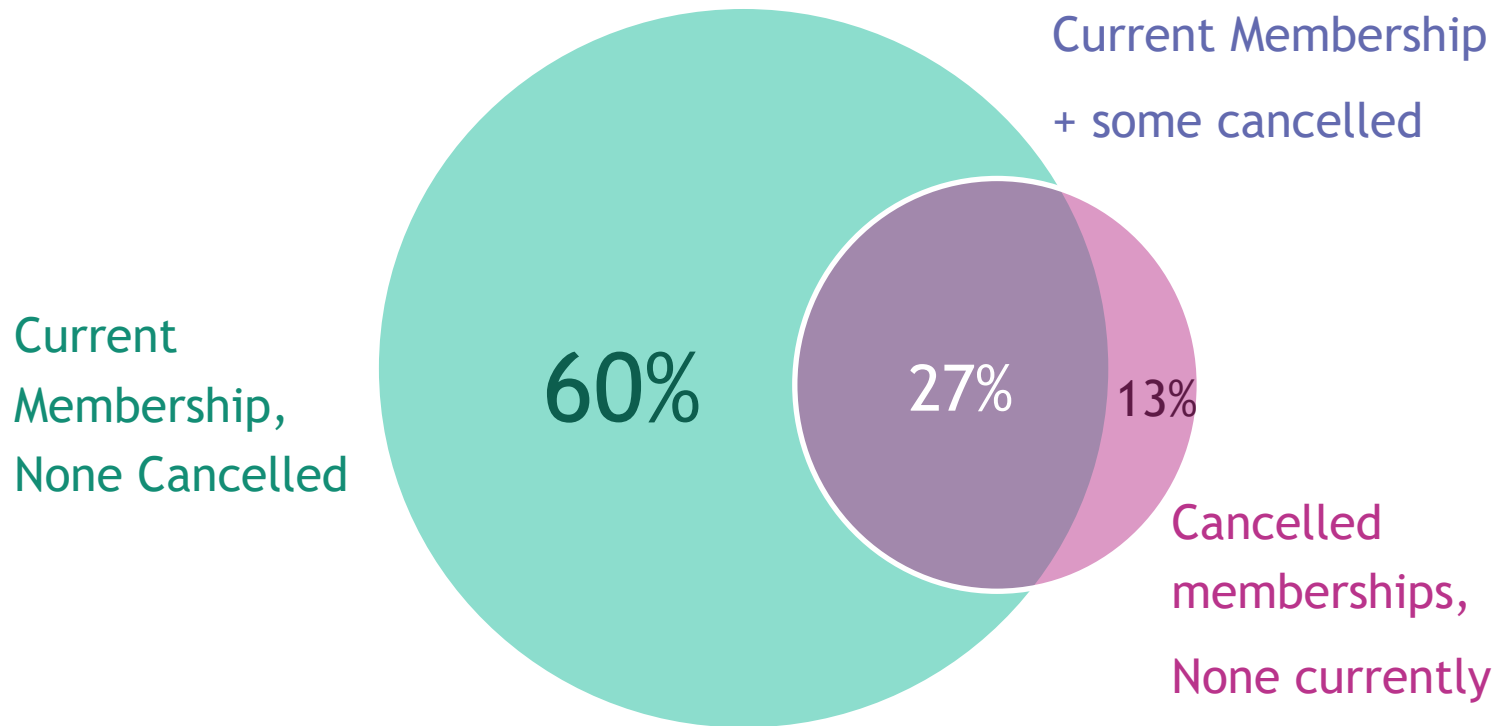
4. Support for Organisations

Types of support

Donations and memberships were most common ways of supporting - and varied by type of organisation



Memberships (45% of population)



Current Membership
Renew Definitely **47%**

Current Membership
Renew Probably **41%**

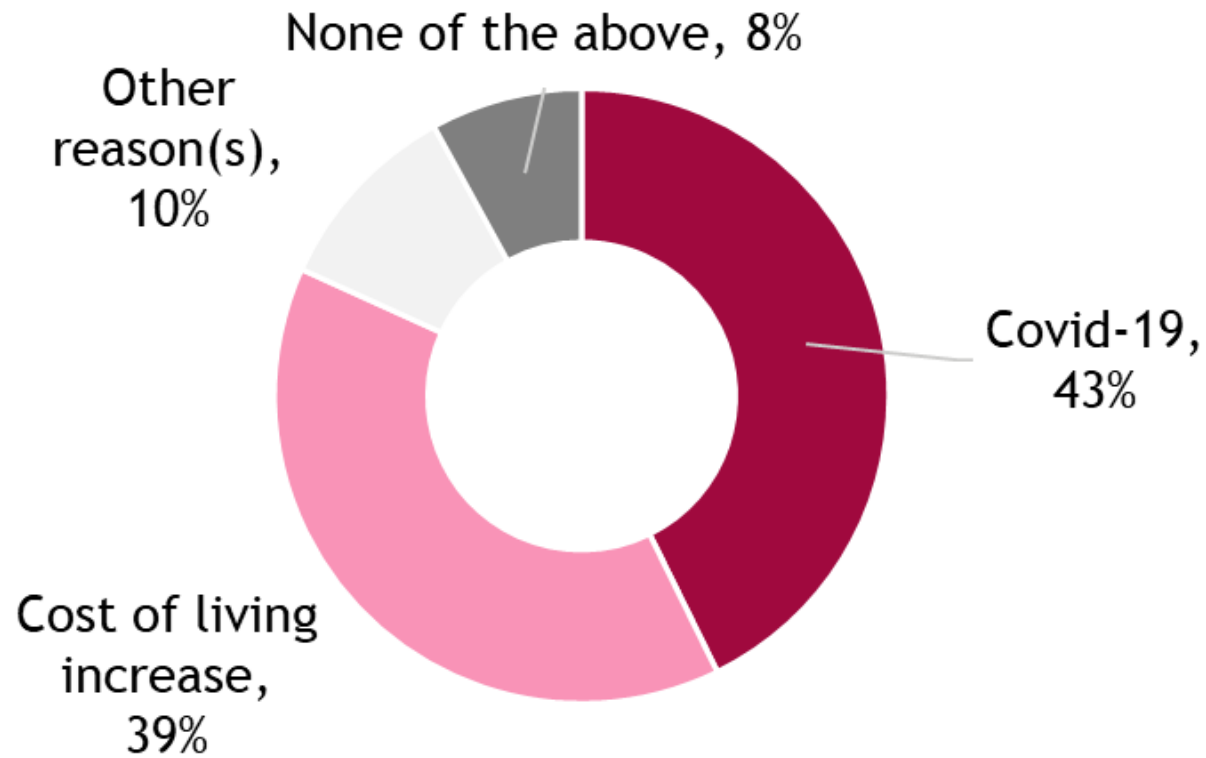
Current Membership
Renew Prob Not / Def Not / DK **12%**

Cancelled Membership
Restart Definitely **24%**

Cancelled Membership
Restart Probably **38%**

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

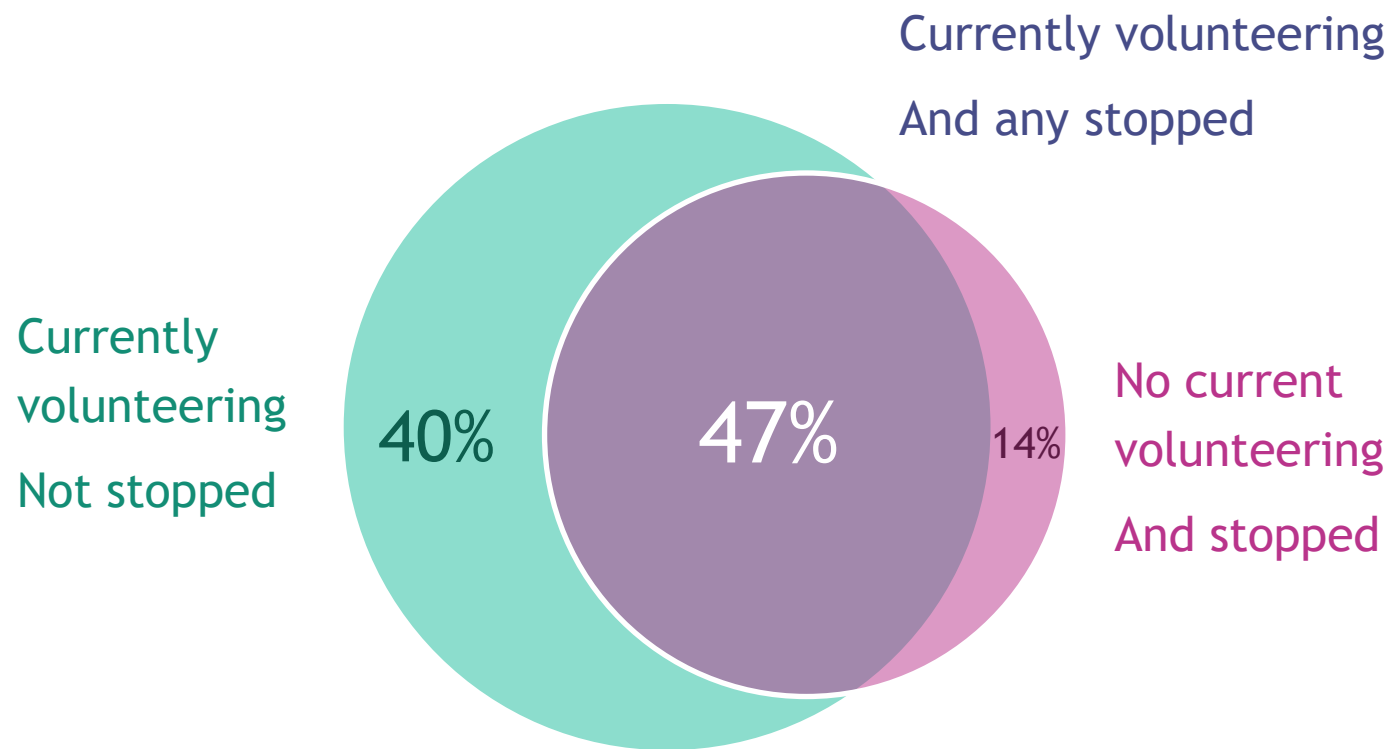
Memberships: Why stopped



- '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%

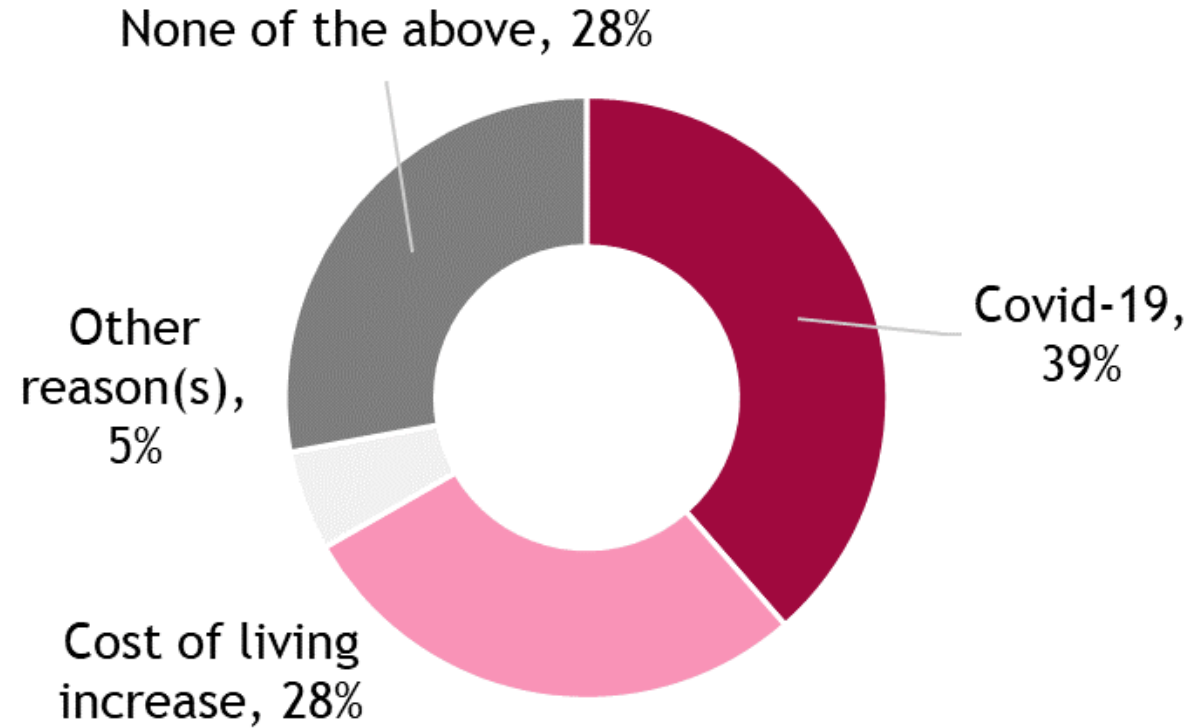
Stopped volunteering

Restart Prob 47%

Stopped volunteering

Restart Prob Not / Def Not / DK 23%

Volunteering: Why stopped

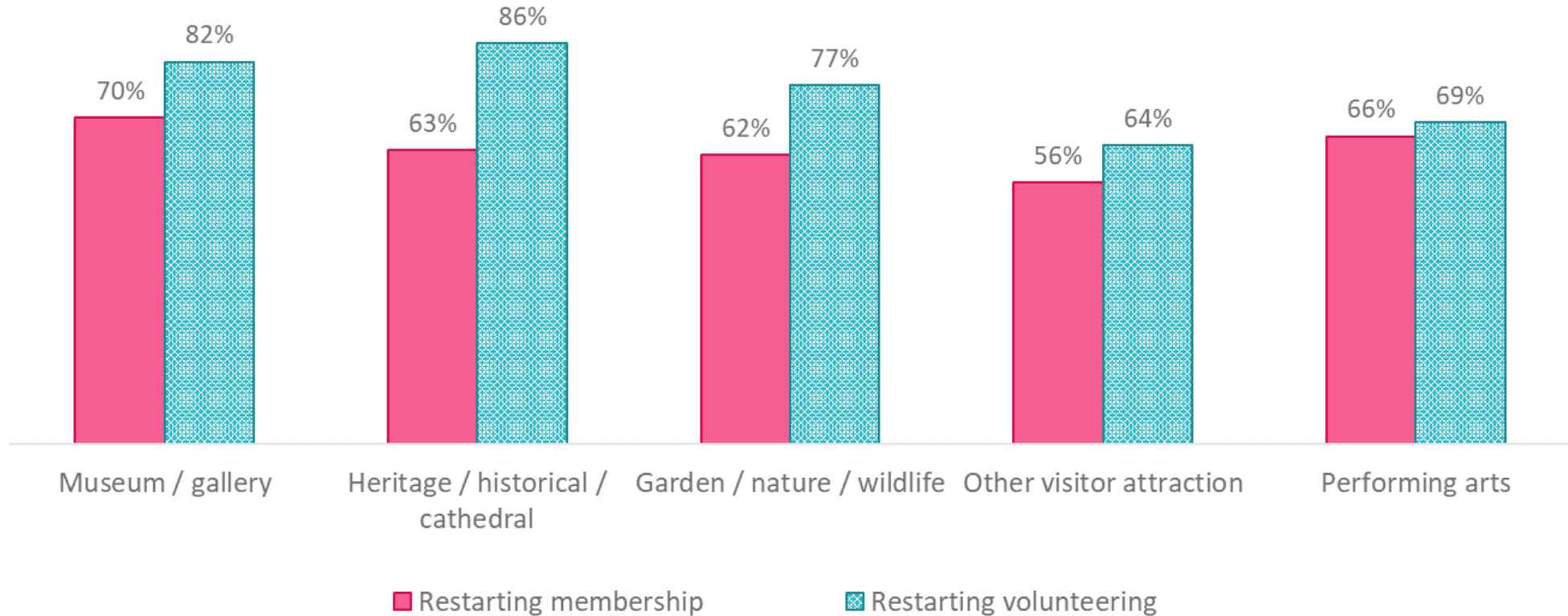


Reason for Attending Less (selected)

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

Most people expect to restart their membership/volunteering in the next couple of years
% of those who had stopped since Covid



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%

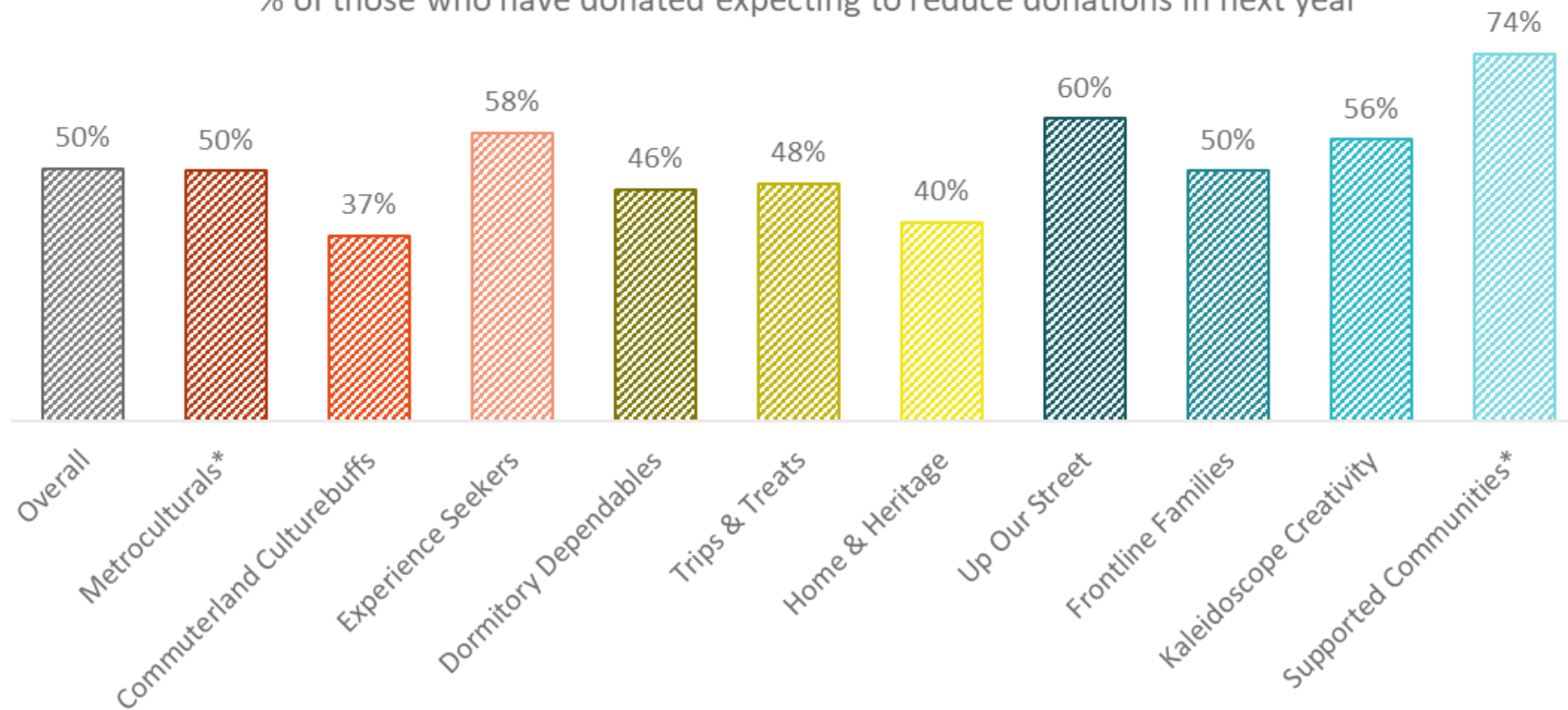
of donors say **the cost of living means they will donate less**: cf. 17% more.

- 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

Experience Seekers and Up Our Street most likely to reduce donations
% of those who have donated expecting to reduce donations in next year



* low sample size: indicative results only

5. Implications and Discussion

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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 the audience agency