Cultural Participation Monitor

Key Findings, July 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 2: Feb 2021
Wave 3: Jun 2021
Wave 4: Sept/Oct 2021
Wave 5: Nov 2021
Wave 6: Apr 2022
Wave 7: Sep 2022
Wave 8: Feb 2023
Wave 9: July 2023

Sample of the whole population, all sectors

Current, regular and longitudinal

Linked to Audience Spectrum profiles

Wave 9 was supported by Association of Leading Visitor Attractions, StageTEXT and the Centre for Cultural Value

ALVA

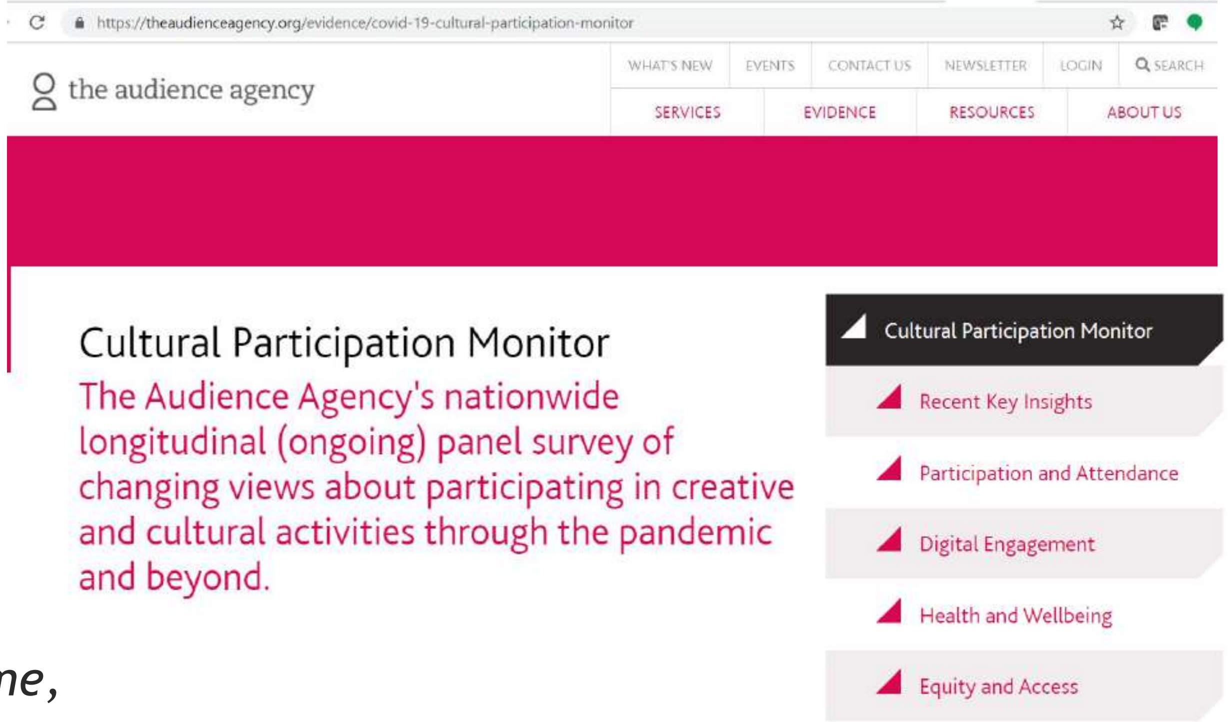
StageTEXT

CENTRE FOR CULTURAL VALUE

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



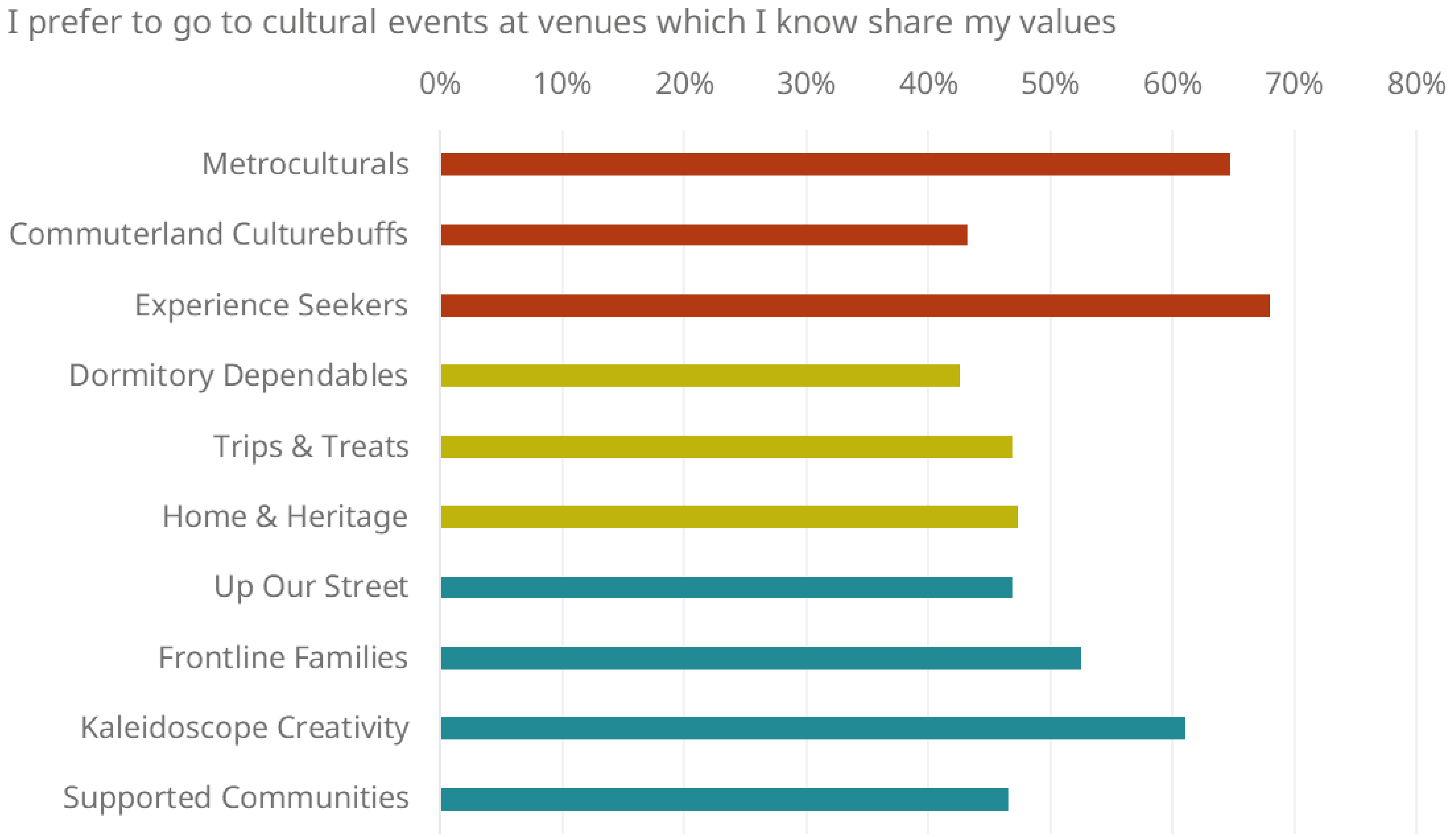
For overall findings from Wave 1-9 and by theme, see theaudienceagency.org/evidence and evidence.audienceanswers.org

Wave 9 Key Topics

- Social values
- Behaviour
- Cost of living
- Covid-19 update
- Modes of engagement
- Cultural preferences

1. Social and Environmental Values

Attendance at venues that share your values



51%

Strongly agree/agree that they would prefer to go to cultural venues that share their values

(8% strongly disagree/disagree)

Cultural events and shared values

I prefer to go to cultural events at venues which I know share my values
(% strongly agree/agree)

60%

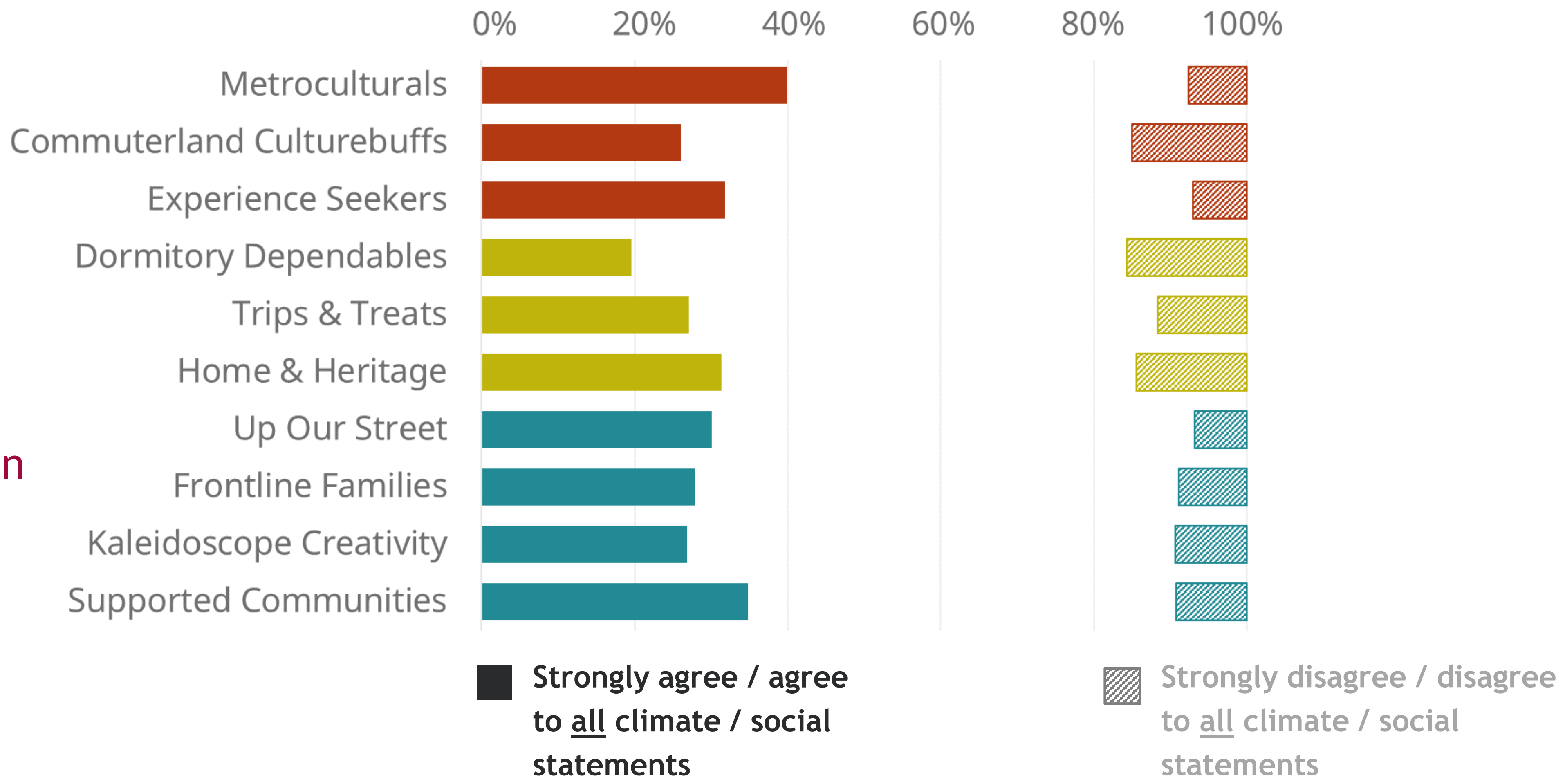
Of those who are better off financially prefer to go live cultural events that share their values.

Taking a stance on climate/social issues

47%

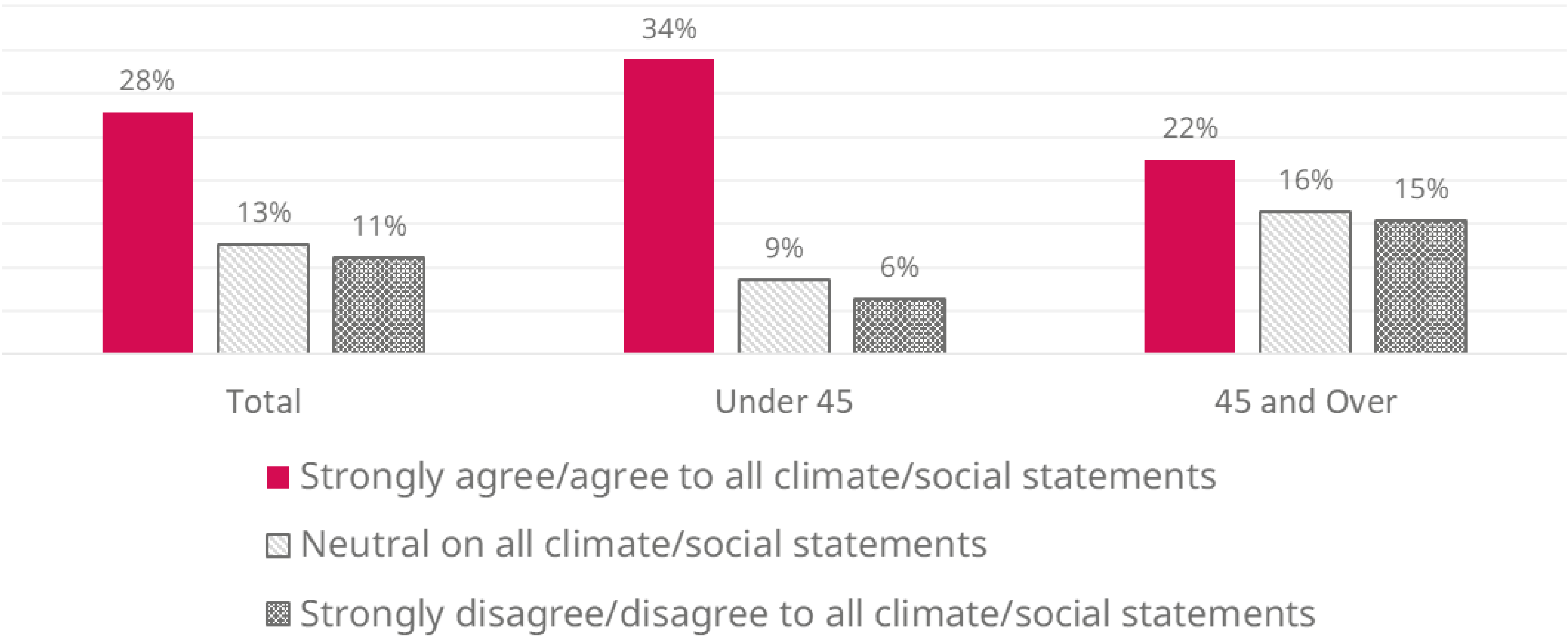
Strongly agree/agree live cultural venues should take a stance on both climate change and social issues

(19% strongly disagree/ disagree)



Climate change and social issues statements

More of those under the age of 45 strongly agree/agree to all climate/social values statements

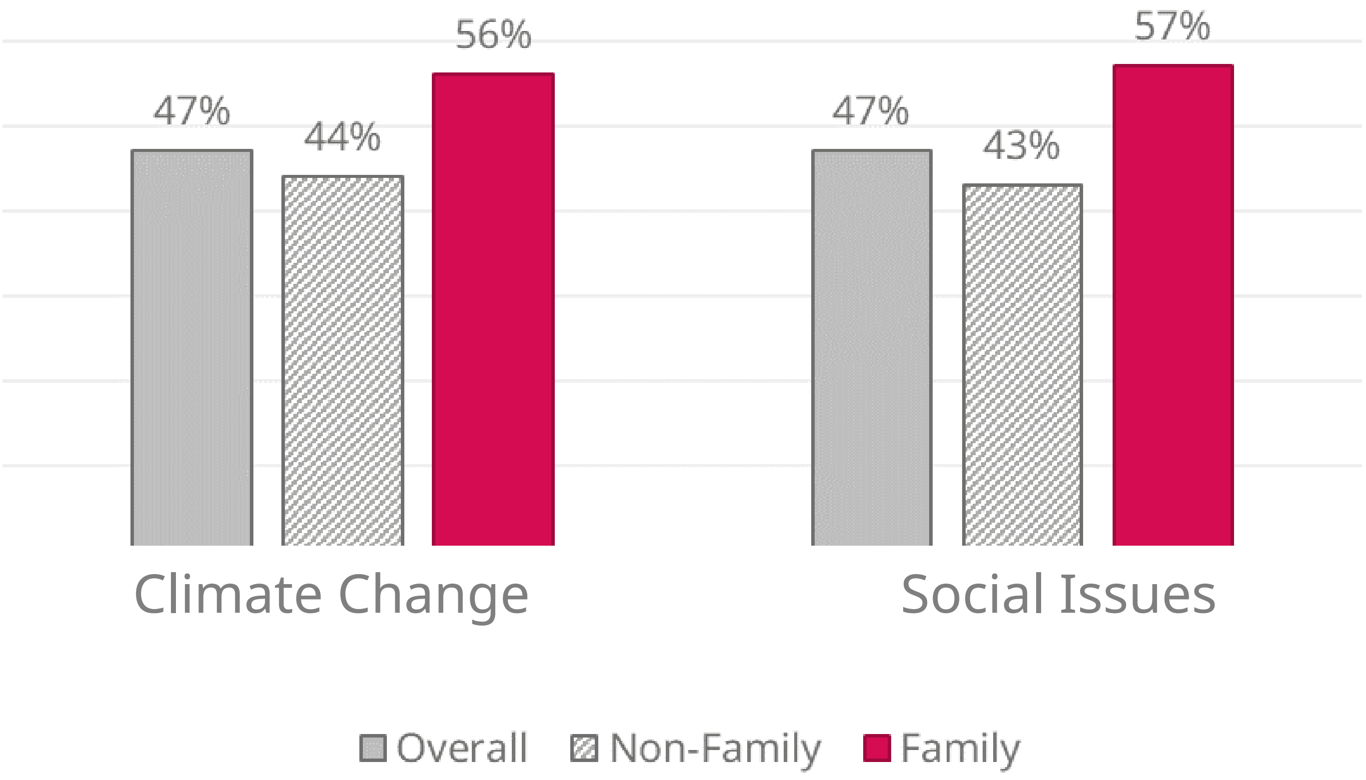


34%

Under 45 agree all types of venue should take a stance on both climate and social issues

Families and climate/social issues statements

Families agree that venues should take a stance on climate change and social issues to a higher level than non-families



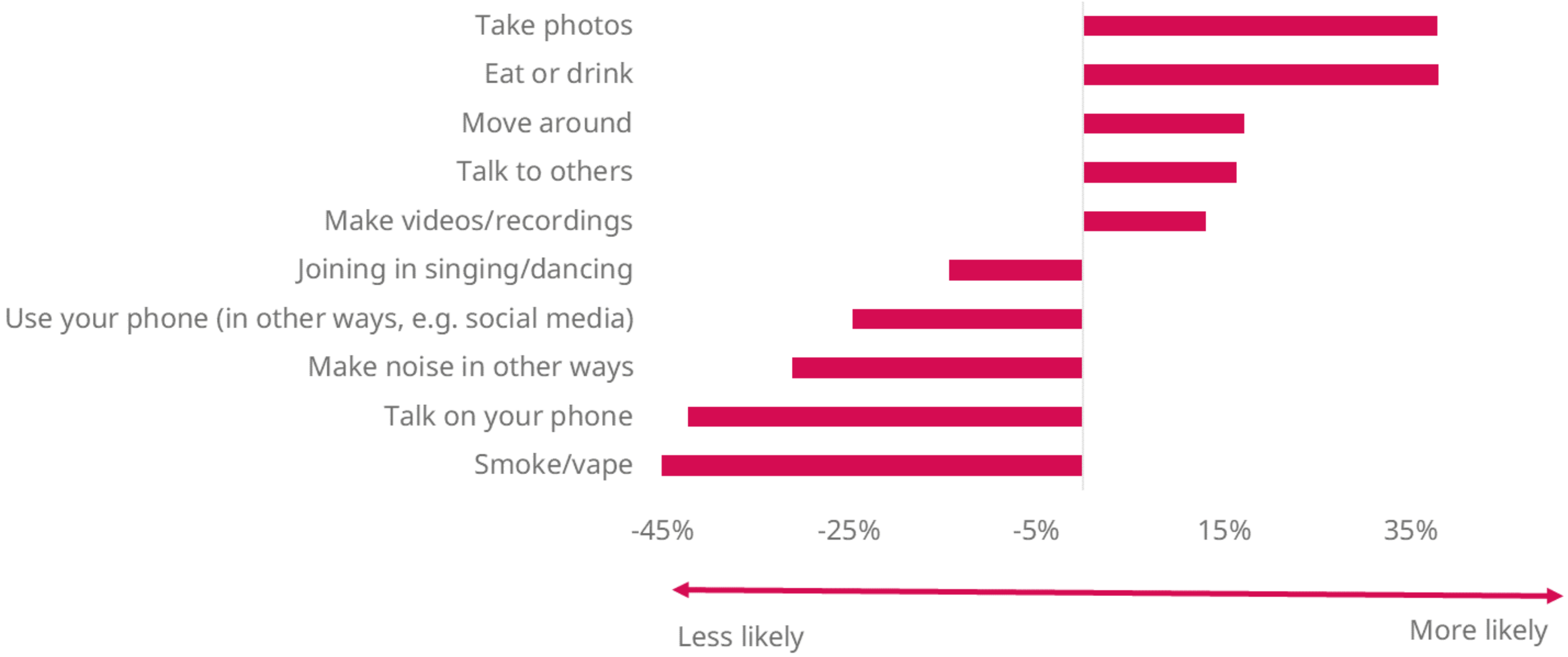
57%

Of families feel live cultural events should take a stance on social issues versus 43% of non-families.

2. Behaviour

Behaviour and attendance

How likely people are to go to a cultural event depending on the type of behaviours that they or other people could do
(Net different: more-less)

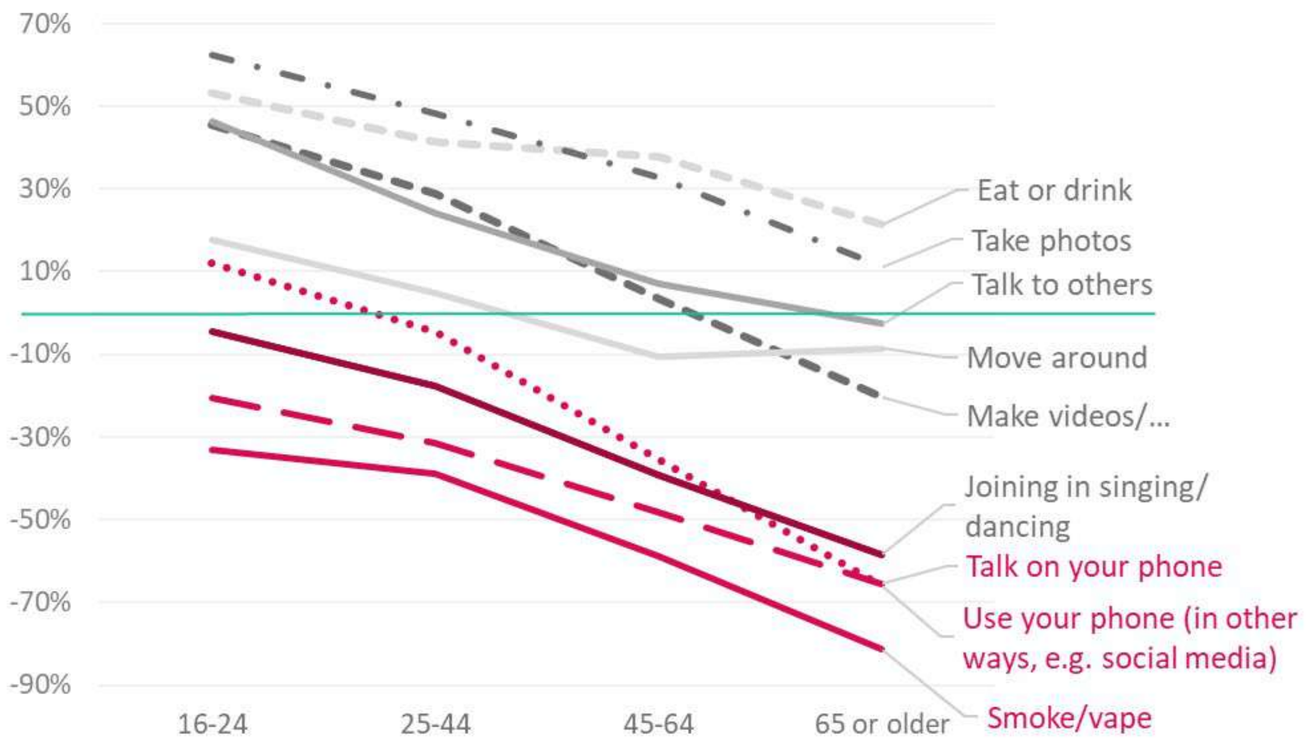


Take photos and Eat or drink most likely behaviours people want to do

Smoke/vape and Talk on your phone least likely behaviours people want to do

Behaviour and attendance

Would you be more or less likely to want to go to a live cultural event if you or others could do the following...?
(Net more - less)

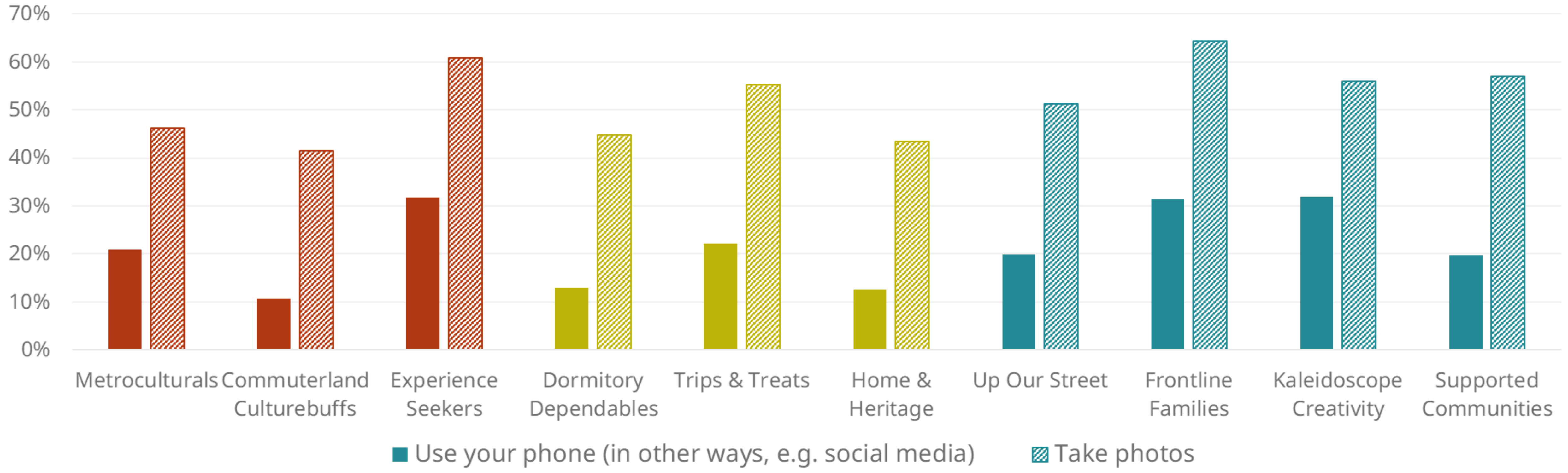


Younger people prefer a wide range of behaviours at cultural events

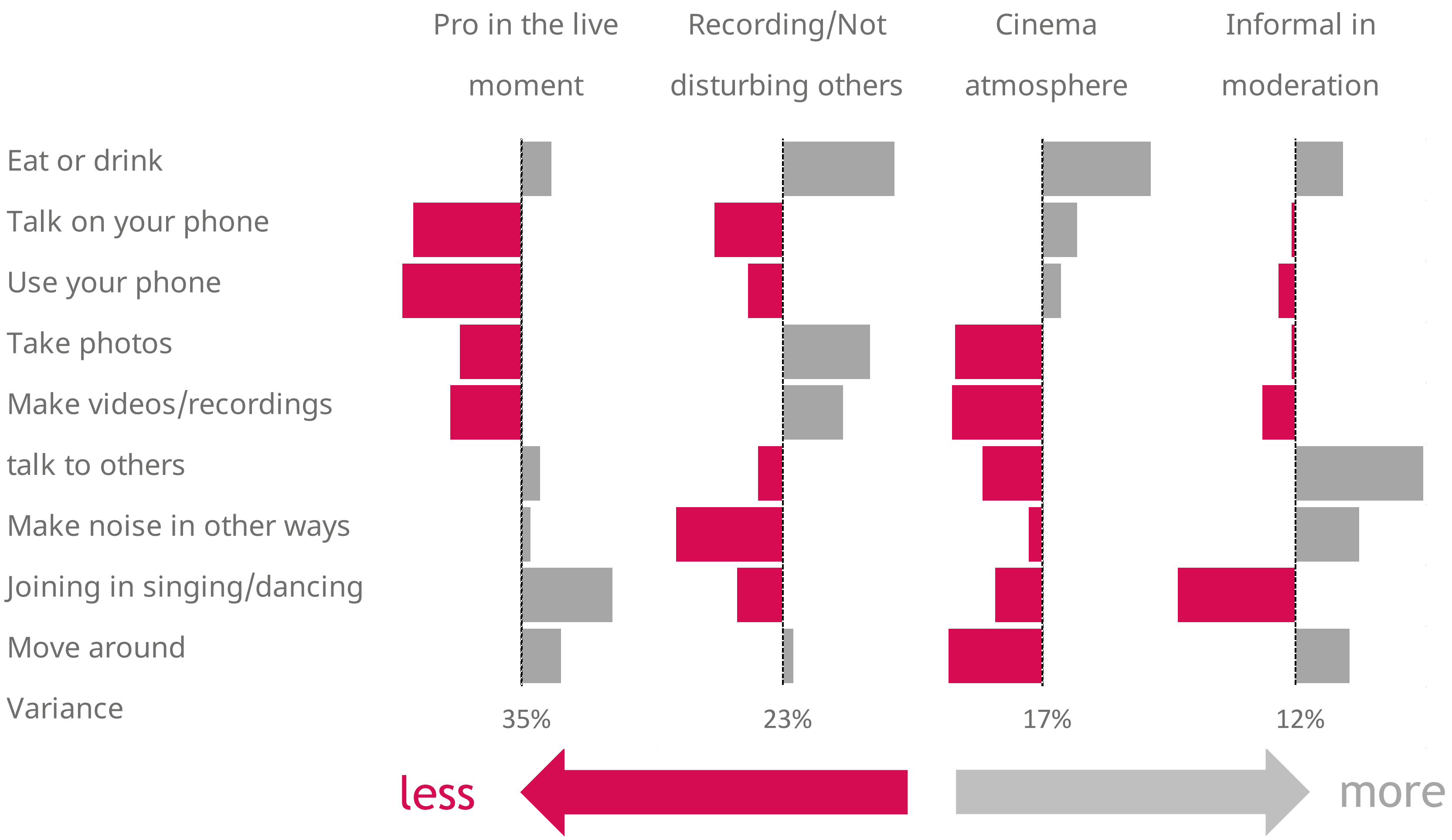
Older people are particularly more anti-phone use

Behaviour and Audience Spectrum

Experience Seekers, Frontline Families and Kaleidoscope Creativity are MORE likely to want to take photos and use their phone in other ways.



Behind the attitudes: four principal components



The strongest relationship is between behaviours that involve phone usage

'Pro in the live moment' shows people who are anti-phone use

3. Cost of Living

Cost of Living

Attitudes re cost of living:

Strongly agree or agree [Net] (Strongly agree)

- Worried about cost of living: 73% [-5%] (21%) [-12%]

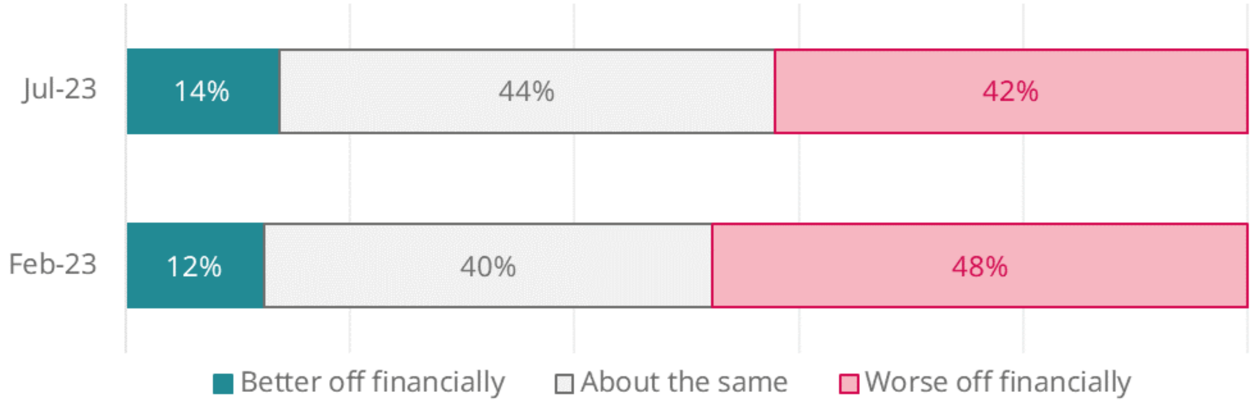
The ‘cost of living crisis’ means I will…

- …Do fewer paid-for leisure activities: 67% [+1%] (28% [+3%])
- …Look for more free leisure activities: 66% [-1%] (26% [+2%])
- …stay closer to home for leisure: 67% [0%] (24% [+3%])
- Affect in 6 months 73% [-4%] (28%), 2 years 57% [-1%] (20%)*

* Very likely or quite likely, very likely

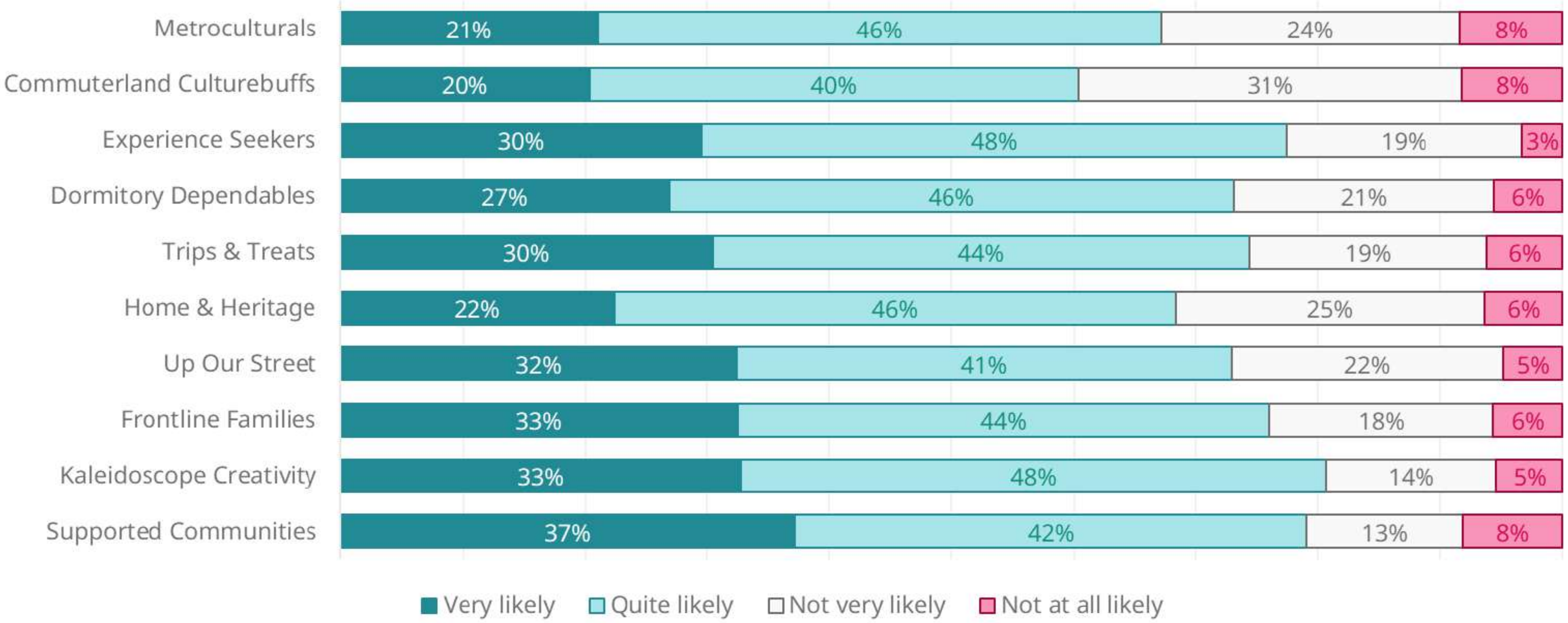
59% are put off attending arts & culture by the cost of living crisis [-7%]

People are feeling slightly financially better off compared to Feb 2023
(% compared to 12 months ago, would you say you are…)

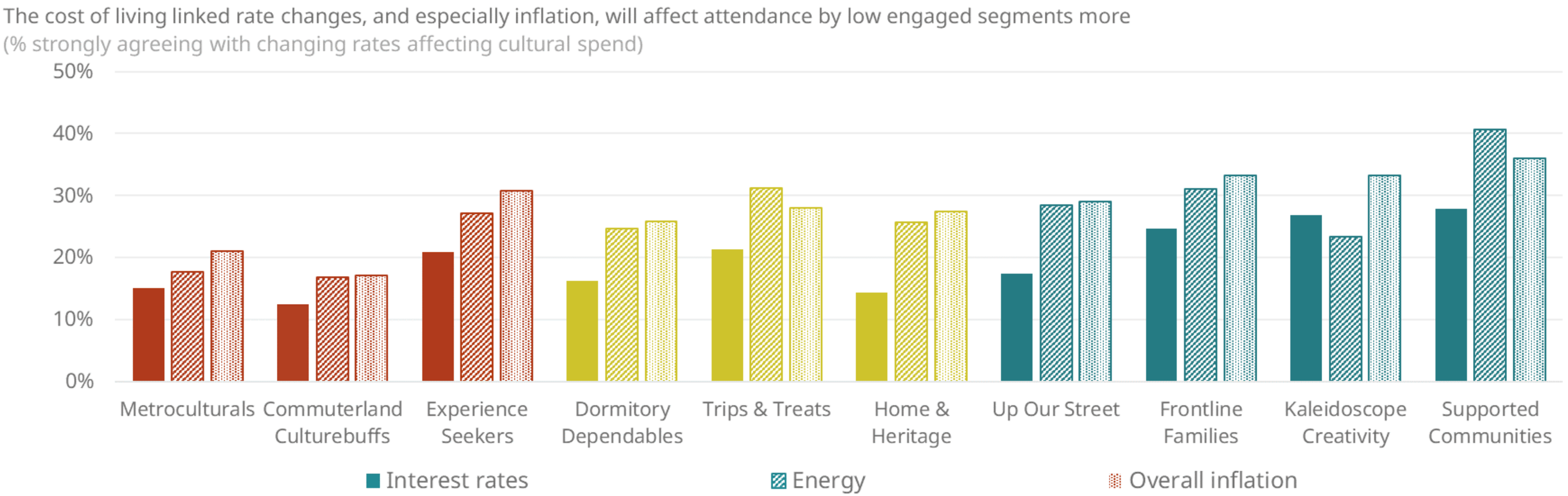


Future impact of cost of living

All Audience Spectrum groups feel that the Cost of Living is quite likely to impact on their life and the activities they do in the next 6 months

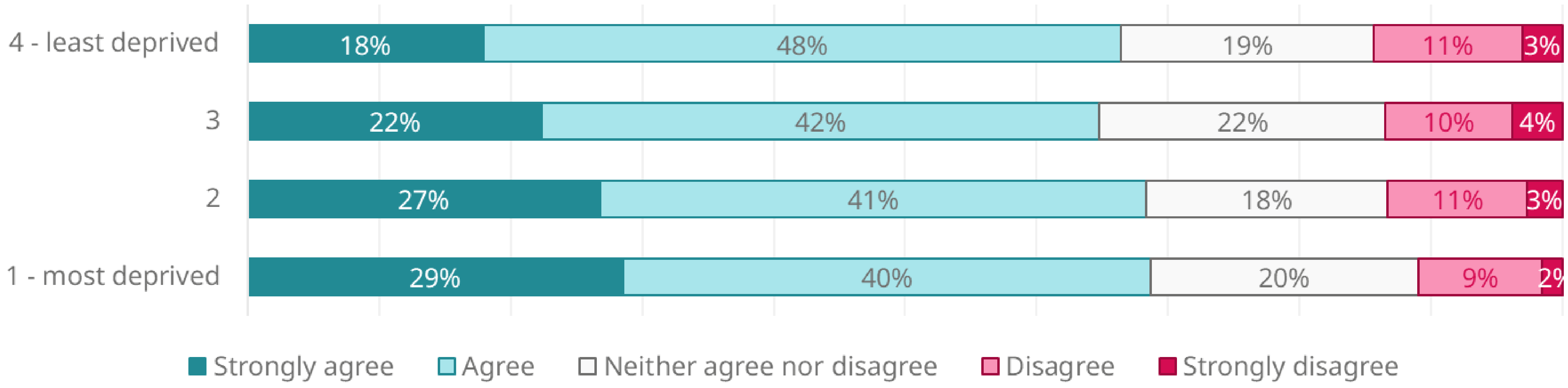


Energy costs, interest rates and inflation



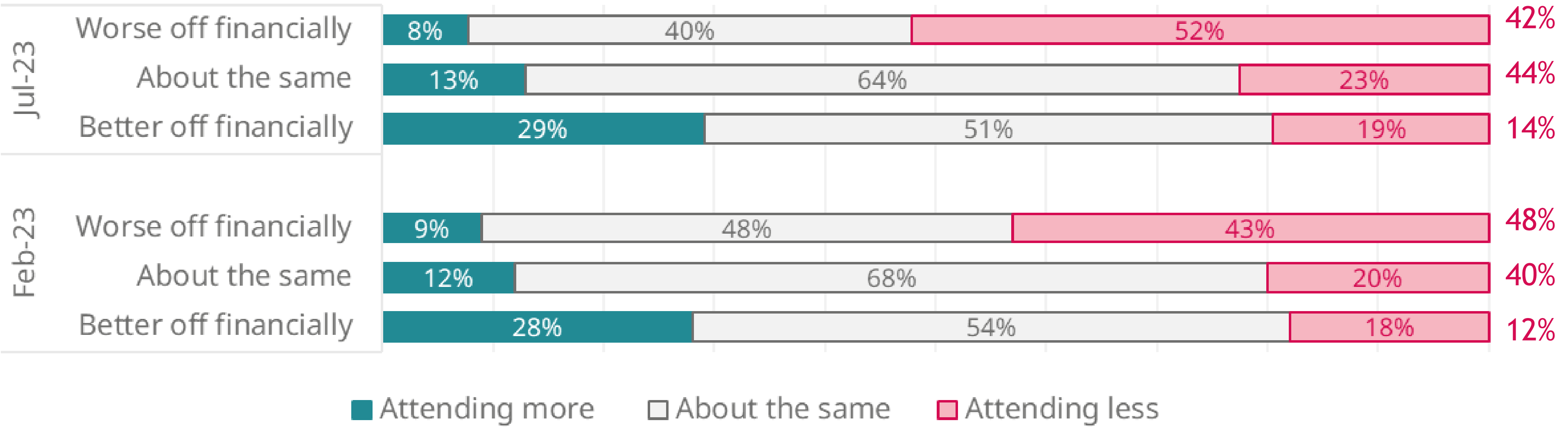
Cost of living and travel distance to leisure activities

The 'cost of living crisis' means that I expect to stay closer to home for entertainment and leisure activities over the next year, e.g. to reduce fuel costs



Barriers to Attendance

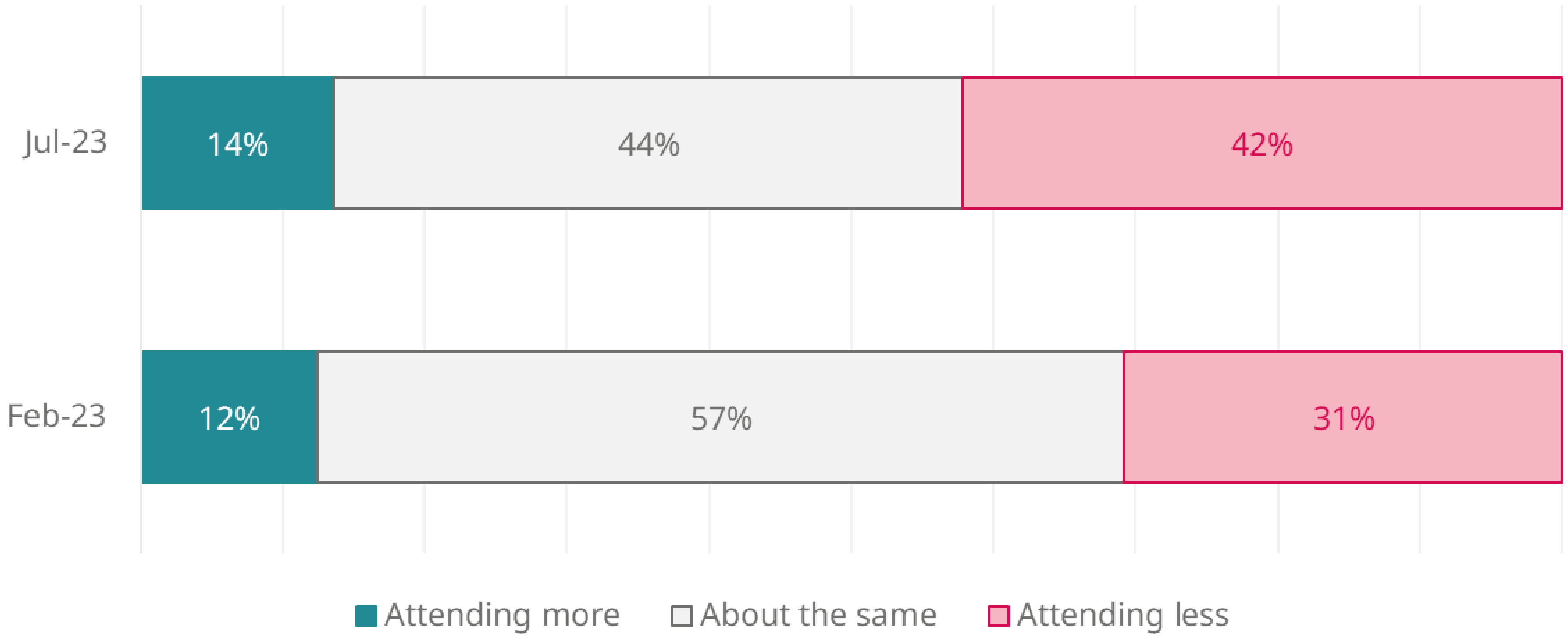
52% of people who feel worse off financially are attending less arts/culture compared to 12 months ago and this is an increase of 9% since Feb 2023



Overall: 52%

Of those feeling financially worse-off than last year are attending less arts/culture

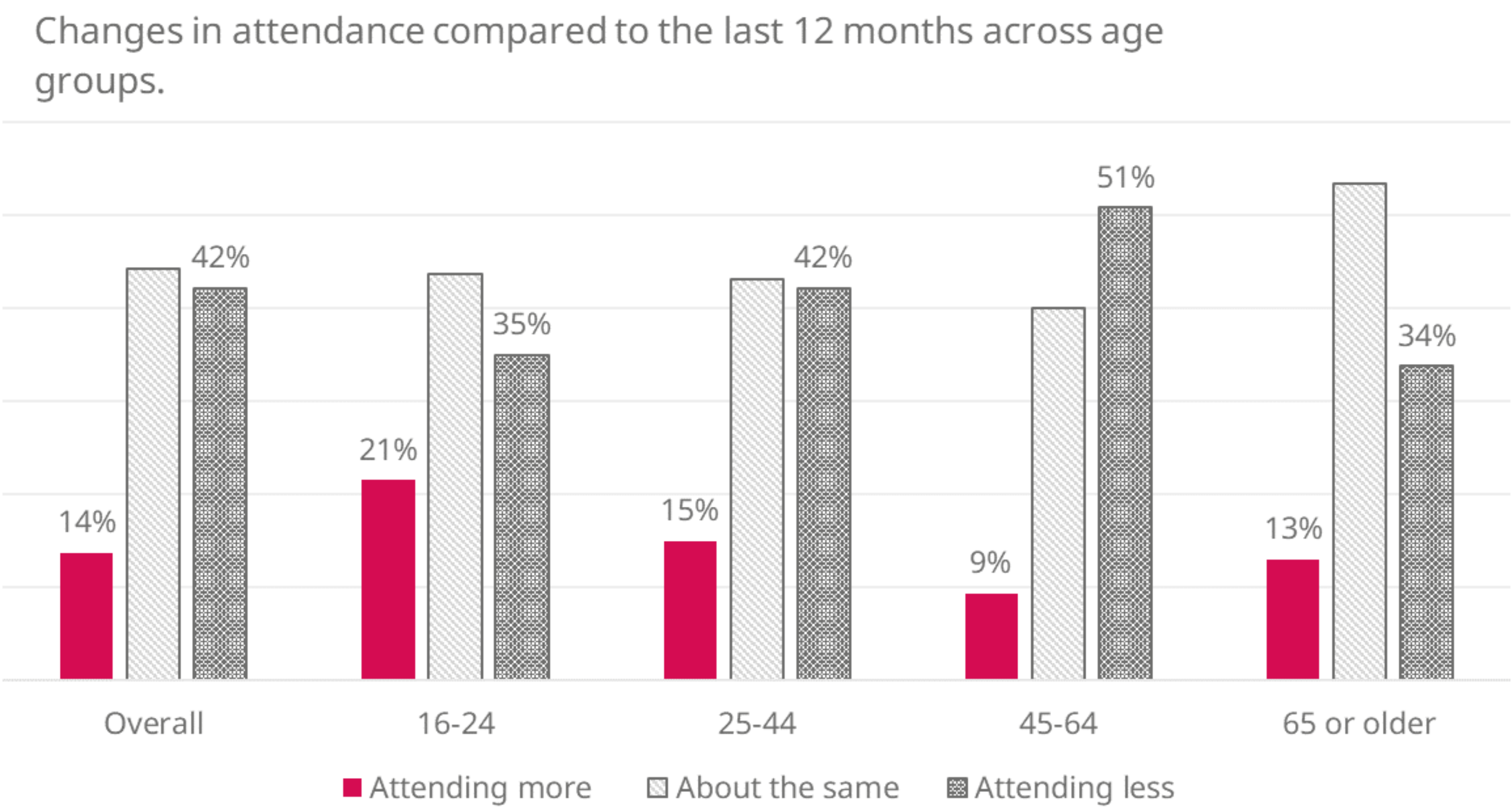
Changes in attendance



42%

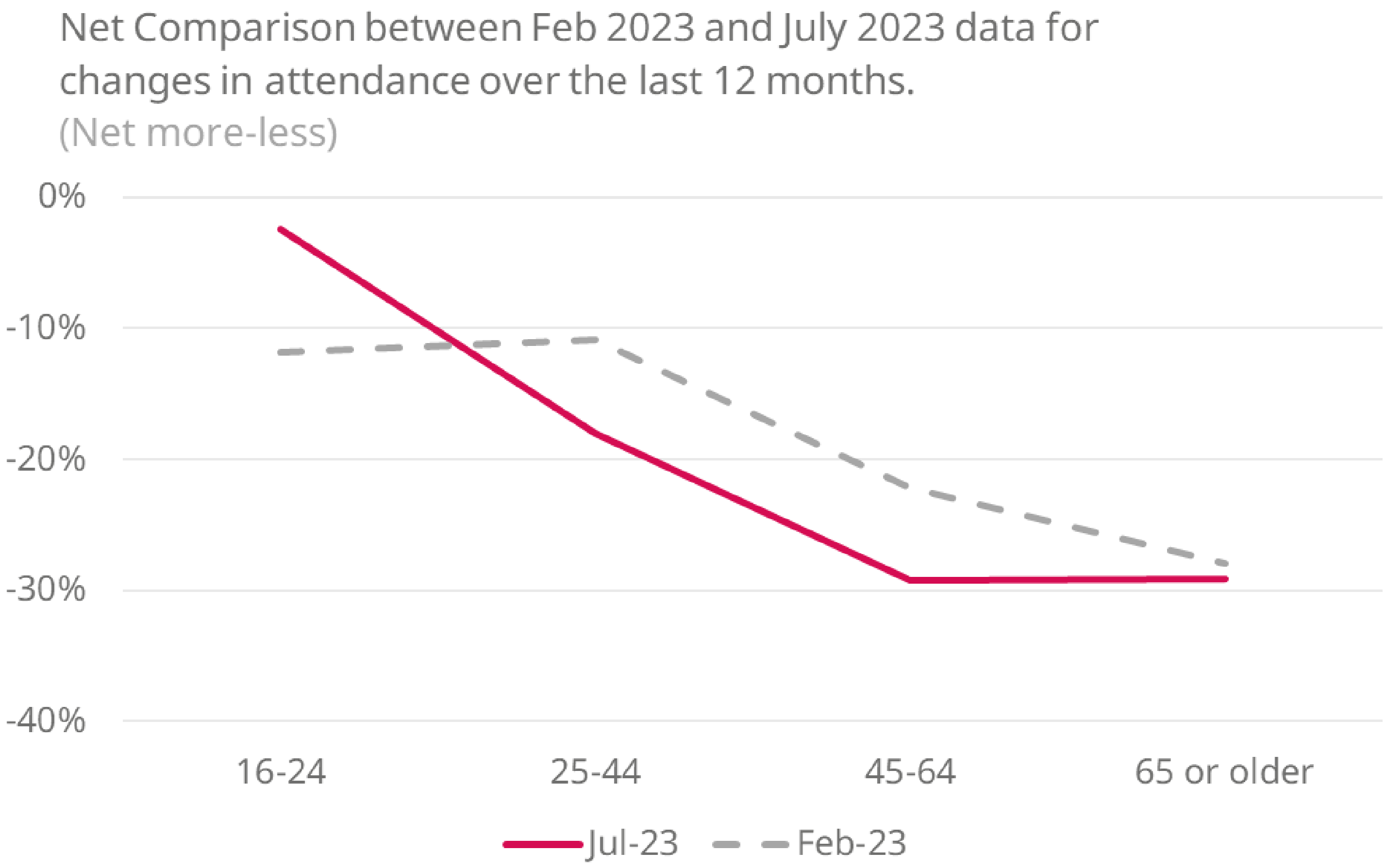
Are attending less arts/culture compared to 12 months ago, which is an increase of 11% from Feb 2023

Changes in attendance



More younger people are attending more compared to older groups, whilst attending less is slightly lower in those 65 and over.

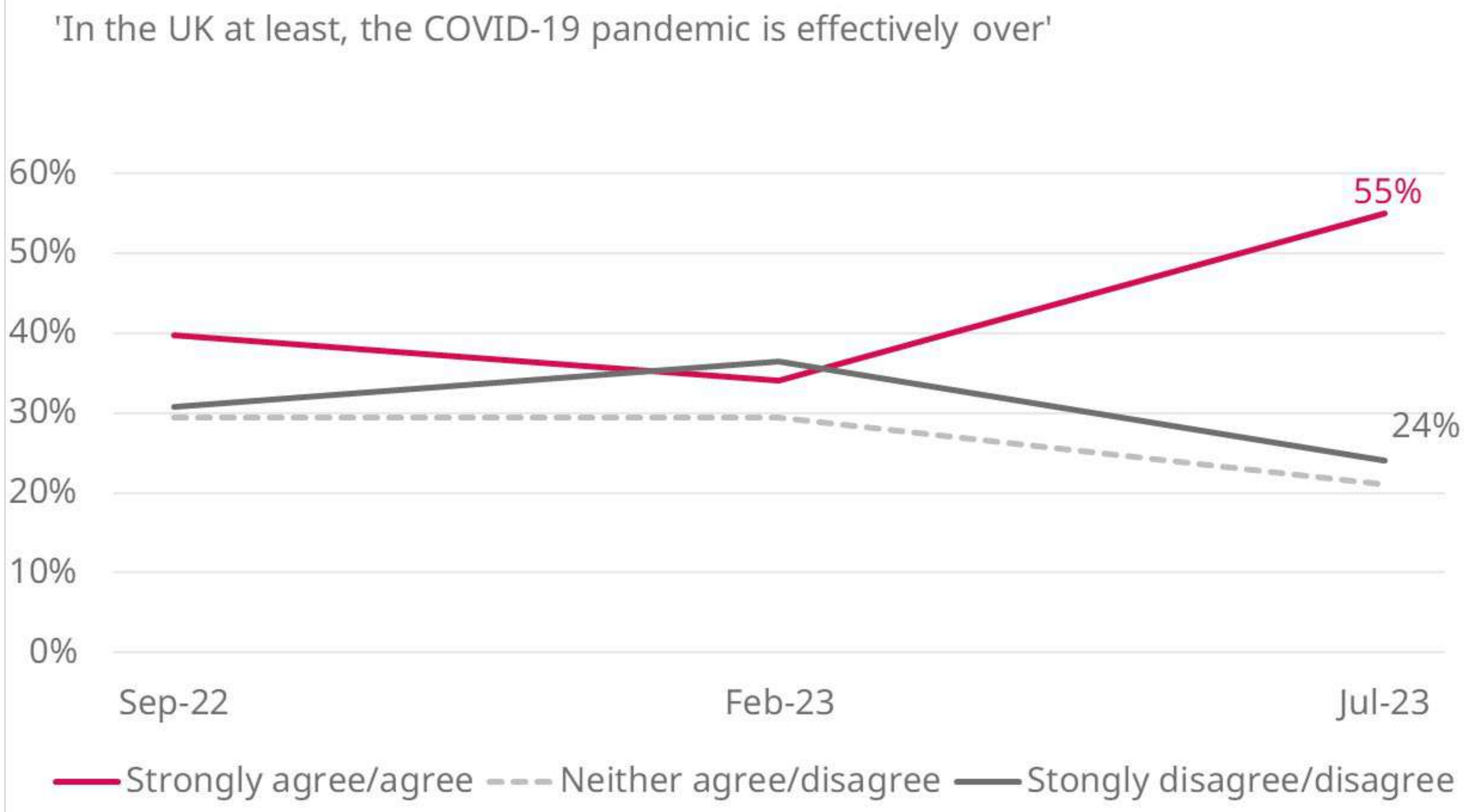
Changes in attendance



Young people are attending more since Feb 2023 compared to older groups, where those 35 and over are attending less frequently.

4. Attitudes to Covid-19

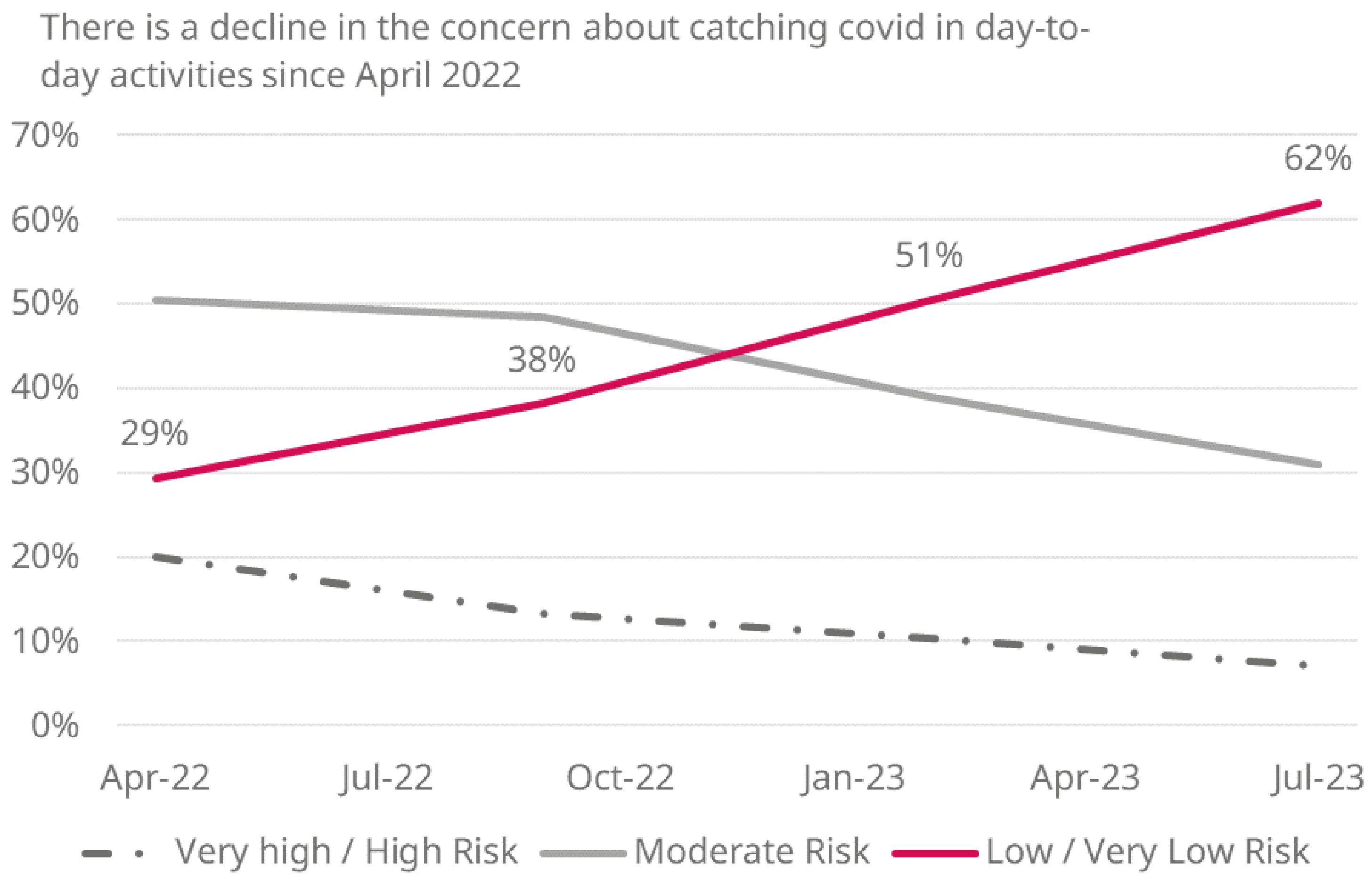
Attitudes to Covid



21%

are put off attending arts & culture by Covid-19

Risk of catching Covid-19 in day-to-day activities



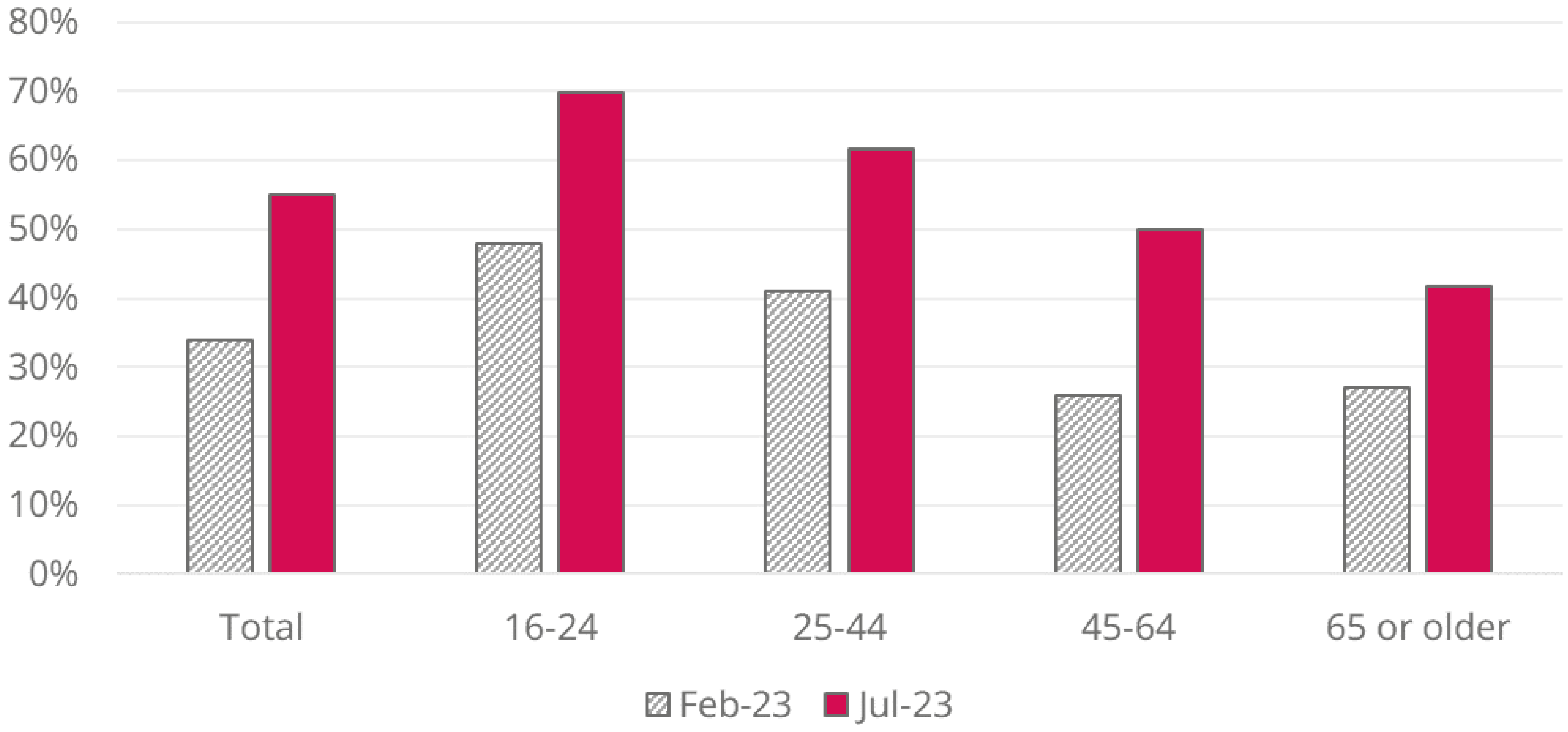
62%

Feel that catching Covid-19 is low risk.

This has been steadily increasing since April 2022

The ongoing influence of Covid-19

A higher number of younger people agree with the statement 'In the UK at least, the Covid-19 pandemic is effectively over'
(% strongly agree/agree)



5. Modes of Engagement

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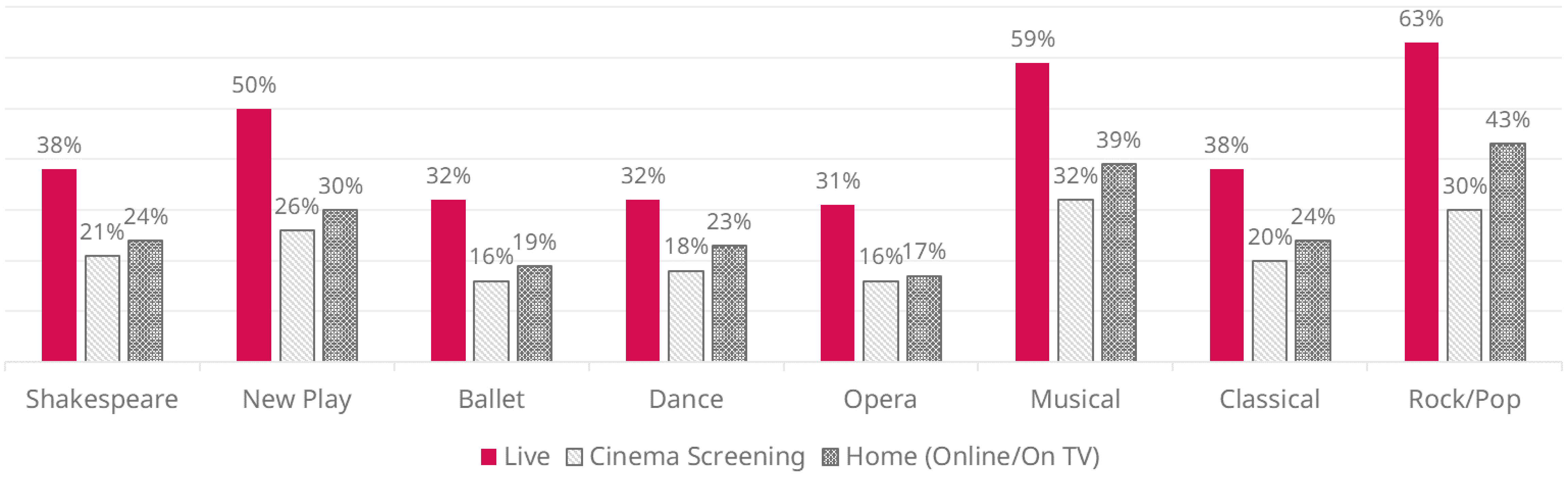
Modes of engagement across artforms

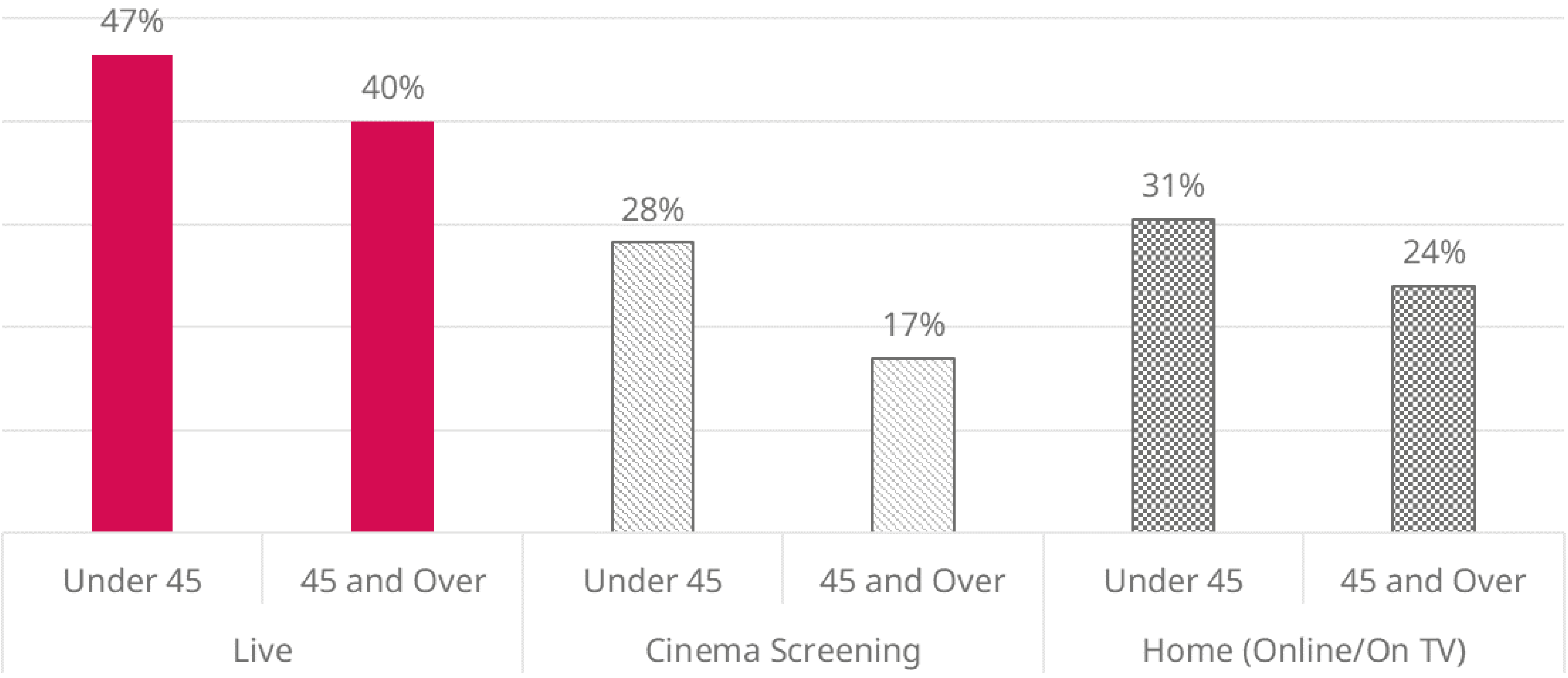
Live performances are preferred for all art forms, followed by at Home, then Cinema Screenings

% Rating of appeal as 4 or 5 (/5)



Modes of engagement and age

Averages for how each artform appeals to under 45s and those 45 and over for different modes of engagement
(Average % for combined artforms)



People finding watching an event at Home MORE appealing than a Cinema Screening.

6. Cultural Preferences

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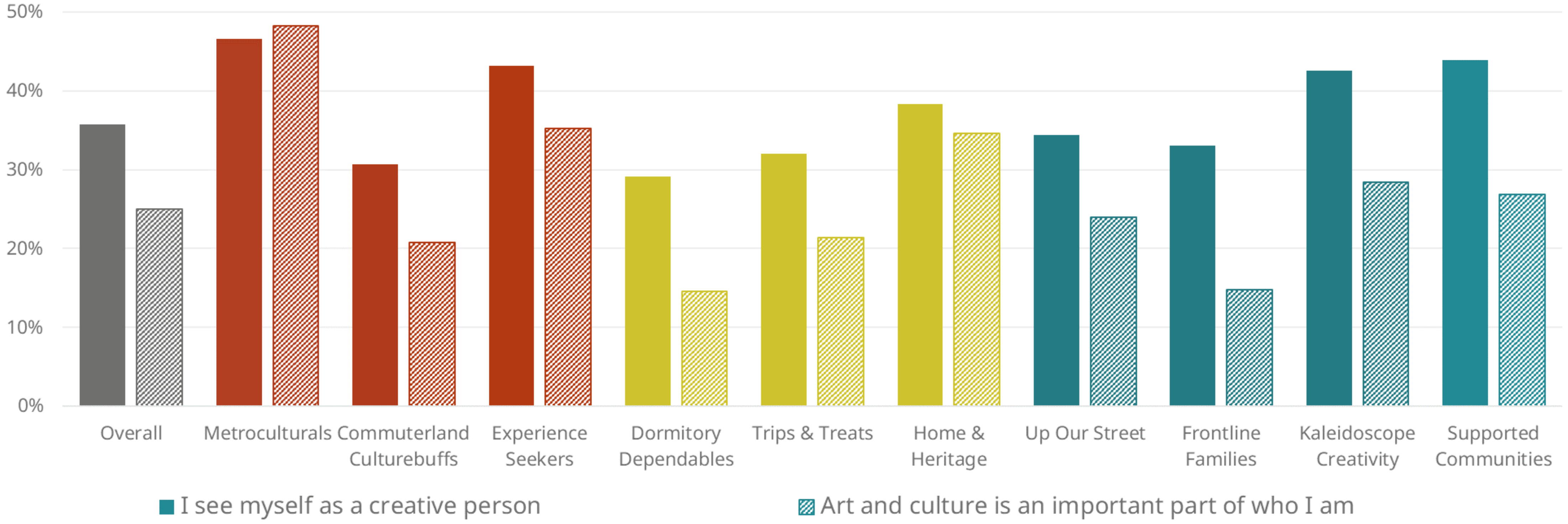
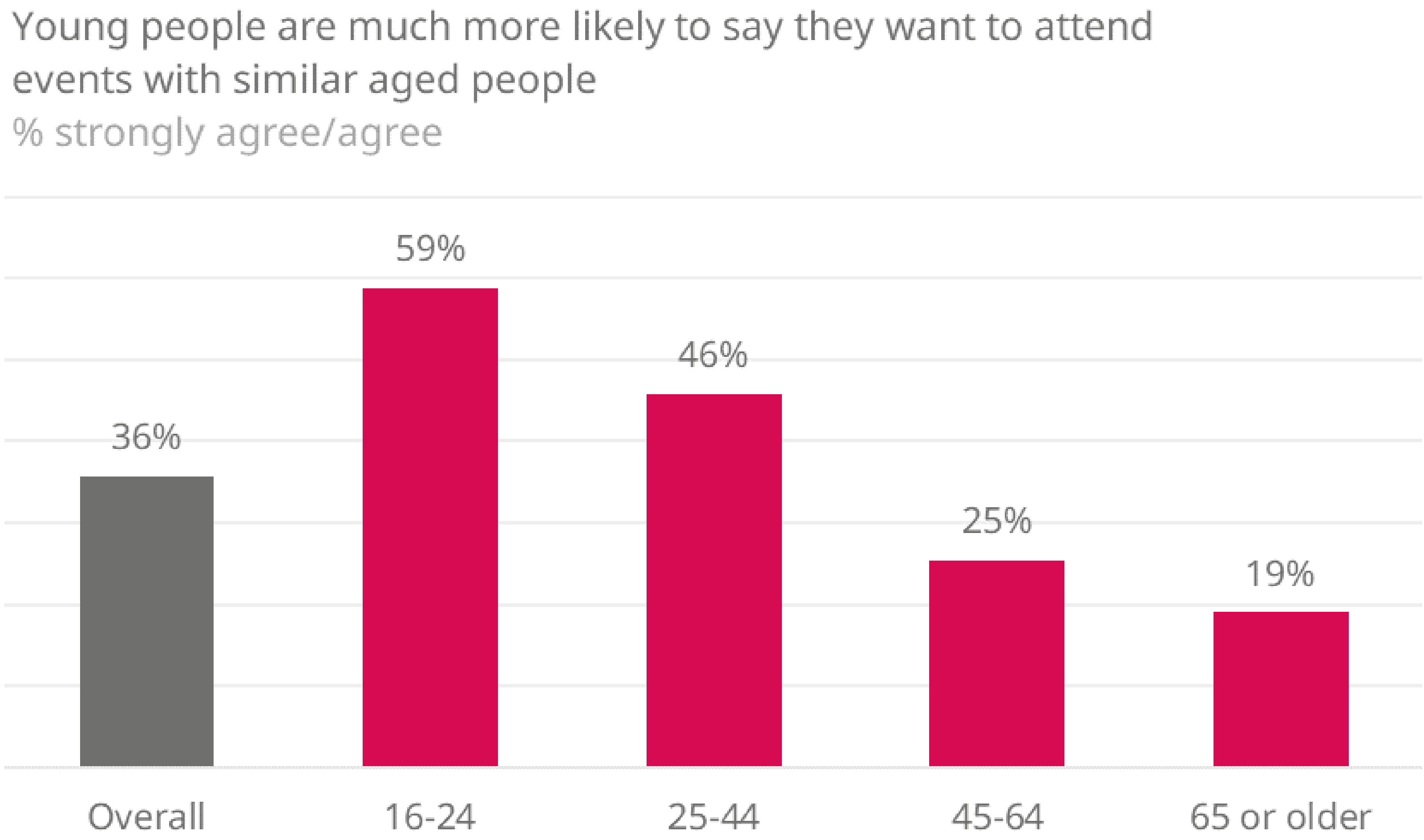
Creative person vs art is important to who I am

Metroculturals agree with both these statements to a similar degree, unlike other segments (% strongly agreeing with statement)



Wanting to attend with similarly aged people



59%

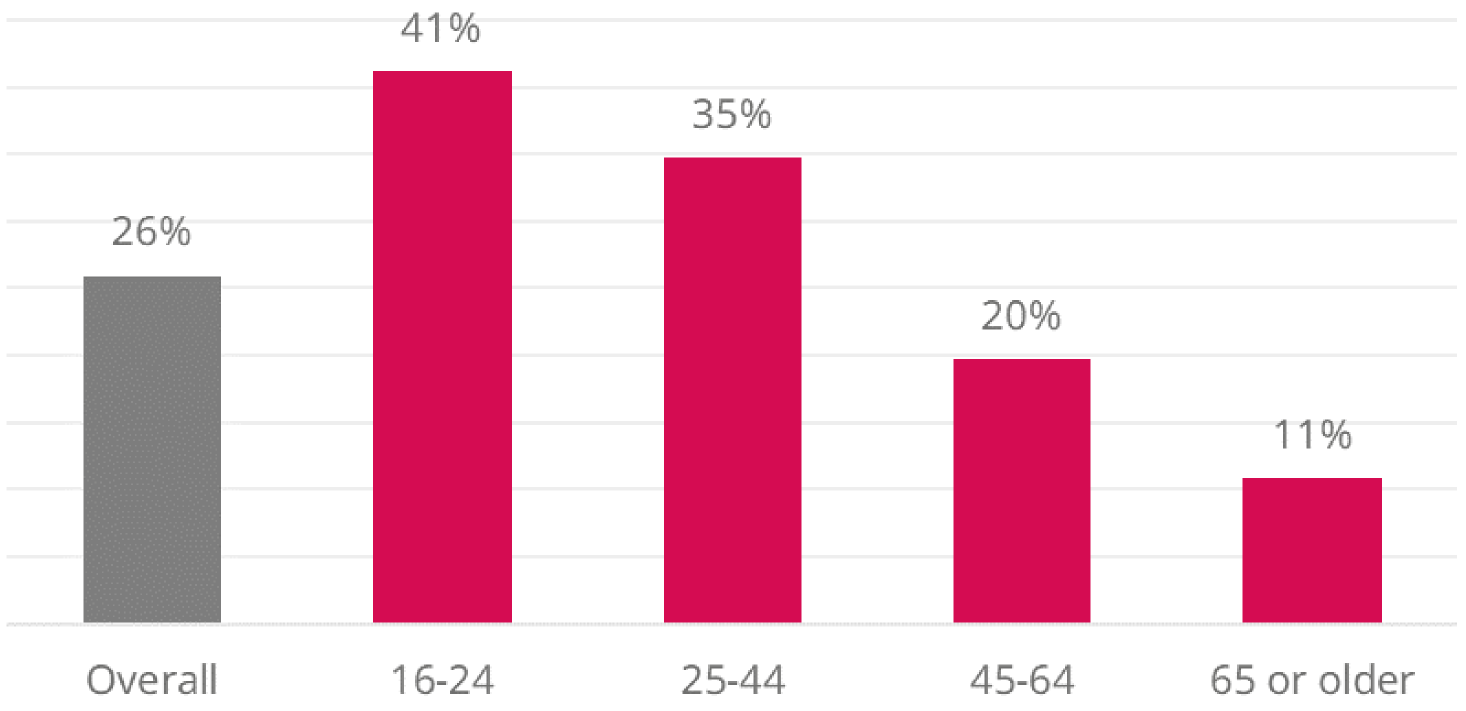
Of those aged 16-24 want to attend with similar aged people.

This steadily declines as age increases.

Wanting to be an audience member who participates

Young people cultural prefer events where they can be an active participant

% Strongly agree/agree



41%

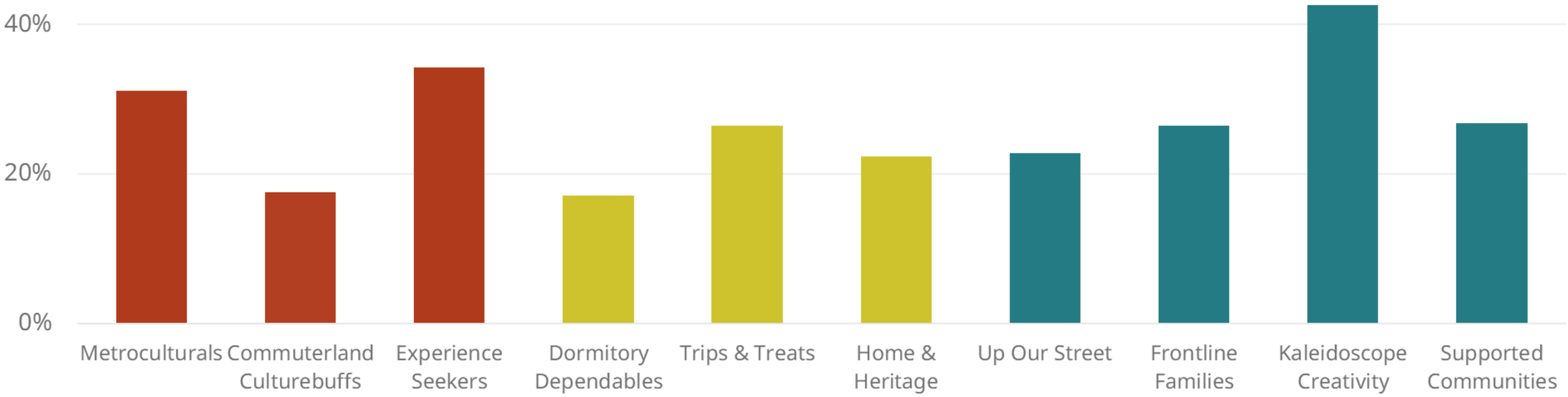
Of those aged 16-24 want to be an active participant.

This steadily declines as age increases.

Wanting to be an audience member who participates

Kaleidoscope Creativity are significanty more likely than any other segment to want to be an audience member who takes part

% strongly agree/agree



5. Implications and Discussion

Implications

- **Values** – take a stance to appeal to younger groups
- **Behaviours** – younger groups more informal; in-the-moment/mediated key dimension; social / [most] phone use attracts younger
- **Cost of living** – situation improving, but entrenched for some
- **Covid** – tipping point reached, but 1/5 still put off
- **Modes of engagement** – varied but live key; younger open to screenings
- **Preferences** – younger prefer attending with those the same age; KC and younger more participatory; role of culture in identity varies…

Implications (cont'd)

- Generational shift? New settlement re values + behaviours + preferences…?
- New normal finally coming?
- Starting to get a picture of the combined impact of Covid-19 and cost of living?

?

Your Reflections and Q&A

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Thank you

Please get in touch: theaudienceagency.org
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