CULTURE + COMMUNITY IN A TIME OF CRISIS

A SPECIAL EDITION OF CULTURE TRACK

Key Findings from Wave 1 | October 21, 2020
**Survey Process**

- Participating organizations sent e-blast invitations to their respective lists
- Wave One fielded late-April through mid-May 2020
- Wave Two to occur post-election/Q4 2020; report in Q1/21

<table>
<thead>
<tr>
<th>124K Respondents</th>
<th>653 Cultural Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2K</strong></td>
<td><strong>336</strong> Museums and Collections**</td>
</tr>
<tr>
<td>Sample from NORC’s AmeriSpeak panel representative of the U.S. general population*</td>
<td>285 Performing Arts***</td>
</tr>
<tr>
<td>*Benchmarked against the U.S. Census Bureau’s February 2020 Current Participation Survey</td>
<td></td>
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<tr>
<td>122K</td>
<td></td>
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<tr>
<td>Sample from 653 Participating Organizations representative of the mailing lists of arts and culture organizations</td>
<td></td>
</tr>
</tbody>
</table>

- **7%** of orgs are part of a higher education organization
- **Includes Zoos, Aquarium, Historic Societies, Botanical Gardens/Arboretums.**
- **Includes Music, Theater, Dance, Opera, Performers, Services/Facilities.**
- **Includes Crafts and Services.**
The cultural sector has an inclusion problem.

<table>
<thead>
<tr>
<th></th>
<th>Organization List Respondents* (unweighted)</th>
<th>U.S. Adult Population</th>
<th>Representation Gap (before weighting)</th>
</tr>
</thead>
<tbody>
<tr>
<td>White/Caucasian</td>
<td>85%</td>
<td>63%</td>
<td>+22%</td>
</tr>
<tr>
<td>Hispanic/Latinx</td>
<td>5%</td>
<td>16%</td>
<td>-11%</td>
</tr>
<tr>
<td>Black/African American</td>
<td>3%</td>
<td>12%</td>
<td>-9%</td>
</tr>
<tr>
<td>Asian or Pacific Islander</td>
<td>4%</td>
<td>6%</td>
<td>-2%</td>
</tr>
<tr>
<td>Native American</td>
<td>&lt;1%</td>
<td>1%</td>
<td>-1%</td>
</tr>
<tr>
<td>Two or More Races</td>
<td>2%</td>
<td>2%</td>
<td>none</td>
</tr>
</tbody>
</table>

*Data from the 653 participating organizations' respondents.
A National Portrait

Geographic Zones

- Mountain: 8%
- West North Central: 6%
- East North Central: 13%
- Middle Atlantic: 13%
- Pacific: 16%
- South Atlantic: 23%
- West South Central: 10%
- East South Central: 5%
- New England: 7%

Generation

- Pre-War (1929-45): 7%
- Boomers (1946-64): 33%
- Gen X (1965-80): 24%
- Millennials (1981-96): 27%
- Gen Z (1997-2012): 9%
  Average age: 49

Race and Ethnicity

- Asian / Pacific Islander: 5%
- Black / African American: 11%
- Hispanic / Latinx: 16%
- White / Caucasian: 62%
- 2+ Races: 4%
- Other: 2%

Highest Education

- Masters, Professional, Doctoral Degree: 19%
- College Degree: 24%
- Associates Degree: 9%
- Some College: 18%
- High School Diploma: 22%
- Less than High School Diploma: 7%

*Includes all with Hispanic ethnicity, regardless of race. All other groups are non-Hispanic.

**Were members, subscribers, volunteers, artists, or employees of cultural organizations.
COVID-19’s Current Impact on Audiences
Respondents report rising feelings of worry, boredom, and disconnection.

People are having different reactions to the current situation. Compared to before the pandemic began, how are you feeling these days? Please select one answer for each feeling.

- **Worried or Afraid**
  - A Lot More: 45%
  - About the Same: 36%
  - A Lot Less: 19%

- **Bored**
  - A Lot More: 45%
  - About the Same: 37%
  - A Lot Less: 16%

- **Lonely**
  - A Lot More: 30%
  - About the Same: 48%
  - A Lot Less: 23%

- **Sad or Depressed**
  - A Lot More: 29%
  - About the Same: 47%
  - A Lot Less: 24%

- **Angry**
  - A Lot More: 25%
  - About the Same: 48%
  - A Lot Less: 27%

- **Calm**
  - A Lot More: 16%
  - About the Same: 50%
  - A Lot Less: 32%

- **Connected to others**
  - A Lot More: 16%
  - About the Same: 38%
  - A Lot Less: 44%

*Five point scale: top two responses and bottom two responses are combined. Arrows indicate where the percentage of respondents selecting "A Lot More" or "A Lot Less" exceeds "About the Same."*
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What Audiences Most Want From Culture
A Meaningful Role to Play

Response patterns reveal four core community needs.

**Connection & Processing**
- 49% Stay connected
- 47% Educate children while schools are closed
- 34% Bring people of different backgrounds together
- 29% Know what’s going on, with trusted information
- 28% Express ourselves creatively
- 27% Heal, grieve, and process our emotions

**Practical Support**
- 41% Look ahead and plan for recovery
- 21% Deal with financial and economic problems
- 18% Meet our practical, everyday challenges

**Emotional Support**
- 53% Laugh and relax
- 41% Have hope

**Escape**
- 46% Offer distraction and escape during the crisis
- 36% Think or talk about important things other than COVID-19

Response patterns were grouped into themes using factor analysis. Total exceeds 100% as respondents could check any that apply.
The Role of Digital in Audience Engagement
Looking to Content Creators

Respondents access digital cultural content from a variety of sources, with individual performers being the single largest category. Few are paying for online access to culture.

ONLY 13% report paying for access to digital cultural content that they used.

Were any of the online activities you used offered by the following sources? Please check any that apply.

- Historic attraction or history museum: 11%
- Library: 11%
- I don't know: 14%
- Individual performer, artist, band, or ensemble: 38%
- Zoo or aquarium: 14%
- Theater group: 10%
- Performing arts center: 14%
- Somewhere else: 17%

Total exceeds 100% as respondents could select all that apply.
Live performances and on-demand content have the greatest awareness and use, while interactive offerings are not as widely adopted.

Q: Which of the following online cultural activities have you personally seen being offered? (select all)
Q: Have you done any of those online or digital cultural activities yourself in the past 30 days (select all)

<table>
<thead>
<tr>
<th>Activity</th>
<th>% who were aware of this activity</th>
<th>% who participated in this activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live-stream performances</td>
<td>40%</td>
<td>17%</td>
</tr>
<tr>
<td>Online classes</td>
<td>37%</td>
<td>12%</td>
</tr>
<tr>
<td>Pre-recorded performances</td>
<td>34%</td>
<td>17%</td>
</tr>
<tr>
<td>Virtual tours</td>
<td>30%</td>
<td>10%</td>
</tr>
<tr>
<td>Podcasts</td>
<td>32%</td>
<td>12%</td>
</tr>
<tr>
<td>Online materials for kids</td>
<td>35%</td>
<td>13%</td>
</tr>
<tr>
<td>Live interactive events</td>
<td>28%</td>
<td>10%</td>
</tr>
<tr>
<td>Online community meetings</td>
<td>24%</td>
<td>7%</td>
</tr>
<tr>
<td>Online exhibitions</td>
<td>20%</td>
<td>5%</td>
</tr>
<tr>
<td>Apps</td>
<td>17%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Note: The percentages indicate the proportion of respondents who were aware of or participated in each activity.
Digital activities are providing critical emotional support and escape during COVID-19.

Q: What (if anything) did you get out of doing those online activities? (select up to 5)

- 54% Had fun
- 52% Relaxed or felt less stressed
- 47% Learned or experienced something new
- 38% Escaped the stress of the real world
- 33% Experienced artworks, performances, or performers
- 27% Felt creative or creatively inspired
- 27% Spent quality time with my friends or family
- 22% Felt transported to another place or time
- 21% Broadened my perspective or worldview
- 4% Celebrated my cultural heritage
Many respondents who are using online cultural offerings had not physically visited the same kinds of cultural organizations in the past year.
These digital content users who are non-recent visitors were frequently more demographically diverse than those who had been in person.

- Of the people using digital content from theatres, those who had not been to a theatre in person in the past year were **twice as likely to be Black or African American** and **twice as likely to have incomes <$25,000** than those who had been in person.

- Of the people using digital content from orchestras, those who had not been to a classical music concert in person in the past year were **15x more likely to be Black or African American** and **three times more likely to be Gen Z** than those who had been in person.

- Of the people using digital content from art museums, those who had not been to an art museum in person in the past year were almost **twice as likely to have a high school education or less (14% vs 29%)** than those who had been in person.
Planning for Future Attendance
Respondents seek a variety of qualities from different cultural experiences, but activities that are fun, lighthearted, and beautiful appeal most.

- **Fun & lighthearted**: Visit a park, garden, or zoo (67%), Go to a concert or musical performance (56%), See a play (64%), Go to a historic site (49%), Go to a science or natural history museum (54%), Take an art, music, or dance class (51%), See a dance performance (62%), Go to an art museum (57%), Go to an art museum (49%), Go to an art museum (47%)
- **Beautiful**: Go to a concert or musical performance (38%), See a play (37%), Go to a concert or musical performance (56%), Go to a concert or musical performance (56%), Go to a concert or musical performance (56%), Go to a concert or musical performance (56%), Go to a concert or musical performance (56%), Go to a concert or musical performance (56%), Go to a concert or musical performance (56%), Go to a concert or musical performance (56%)
- **Adventurous**: See a play (37%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%)
- **Challenging or thought-provoking**: Go to a concert or musical performance (23%), Go to a concert or musical performance (23%), Go to a concert or musical performance (23%), Go to a concert or musical performance (23%), Go to a concert or musical performance (23%), Go to a concert or musical performance (23%), Go to a concert or musical performance (23%), Go to a concert or musical performance (23%), Go to a concert or musical performance (23%), Go to a concert or musical performance (23%)
- **Emotionally powerful**: Go to a concert or musical performance (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%)
- **Active & participatory**: See a dance performance (44%), Go to a children’s museum (70%), Go to a children’s museum (50%), Go to a children’s museum (45%), Go to a children’s museum (50%), Go to a children’s museum (45%), Go to a children’s museum (50%), Go to a children’s museum (45%), Go to a children’s museum (50%), Go to a children’s museum (45%)
- **Social**: Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%)
- **Comforting**: Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%), Go to an art museum (47%), Go to an art museum (49%)

Only the top three qualities for each activity are listed unless qualities were tied.
Protocols for the New Normal

Organizations control 6 out of 10 factors that will influence respondents’ decisions to return to cultural activities.

**INTERNAL**

- **54%** Increased cleaning for all surfaces
- **46%** Reduced admission levels to limit crowding
- **43%** Enforcement of masks for visitors
- **31%** Enforcement of masks for staff
- **29%** Health screening measures prior to entry
- **19%** The organization’s decision that it’s time to reopen

**EXTERNAL**

- **50%** COVID-19 vaccine becoming available
- **41%** Announcement from government or public health officials that it is safe to return
- **40%** Wide availability of COVID-19 immunity testing
- **14%** Seeing other people around me starting to attend again

Which of the following factors will most influence your decision to resume attending in-person arts & culture experiences? Please check up to 5.

5% selected “Other.”
The Change Respondents Want to See

Respondents indicate a variety of ways cultural organizations could change to be better in the future. 72% selected one or more of these changes.

<table>
<thead>
<tr>
<th>Inclusivity and Community</th>
<th>Enjoyment</th>
<th>Reflection and Innovation</th>
</tr>
</thead>
<tbody>
<tr>
<td>24% Supporting local artists, organizers, etc.</td>
<td>28% More fun</td>
<td>18% Stories or content that connect to my life</td>
</tr>
<tr>
<td>24% Friendlier to all kinds of people</td>
<td>17% Less formal</td>
<td></td>
</tr>
<tr>
<td>20% Treat their employees fairly and equitably</td>
<td>14% More child-friendly</td>
<td>16% More frequent new works or exhibits</td>
</tr>
<tr>
<td>19% Engage more young people</td>
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<td></td>
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<tr>
<td>18% More focus on our local community</td>
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<tr>
<td>18% More diverse voices and faces</td>
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<tr>
<td>15% Working with other nonprofits in our community</td>
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<td></td>
</tr>
</tbody>
</table>

28% selected “Nothing—I wouldn’t change them at all.”

In general, what kinds of changes would make arts and culture organizations better for you in the future? Please check all that apply.

Response patterns were grouped into themes using factor analysis. Total exceeds 100% as respondents could check any that apply.
“The pandemic, and our country’s fractured responses to it, the magnitude of illness and death—all of these are almost unendurable. We need places and ways to gather and still have joy and pleasure in our lives. Places, even if virtual, to comfort each other and feel human, humane, and normal.”
“It’s nice to show that the arts/cultural community is resilient enough to exist beyond the beautiful buildings they’re housed in. It shows that between the institutions and visitors the connection is still strong.”
“Our nation's chief problem during the last 50 years is its declining social cohesion. Seems as if the arts have a role here. This wasn't acknowledged before the pandemic but would be vital as we move to a different existence within the world-wide community after the pandemic.”
Discussion