



CULTURE + COMMUNITY IN A TIME OF CRISIS

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AUDIENCE RESEARCH



Key Findings from Wave 1 | October 21, 2020

Key Sponsors and Partners



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

124K Respondents

2K

Sample from
NORC's AmeriSpeak panel
 representative of the
 U.S. general population*



**Benchmarked against the U.S. Census Bureau's February 2020 Current Participation Survey*

122K

Sample from
653 Participating Organizations
 representative of the
 mailing lists of arts
 and culture organizations

653 Cultural Organizations



336

**Museums and
 Collections****

285

**Performing
 Arts*****



25

**Arts Schools
 and Services**

4

**Visual Arts and
 Photography******

3

**Film, Radio,
 and Television**

7% of orgs are part of a higher education organization

***Includes Zoos, Aquaria, Historic Societies, Botanical Gardens/Arboretums.*

****Includes Music, Theater, Dance, Opera, Performers, Services/Facilities.*

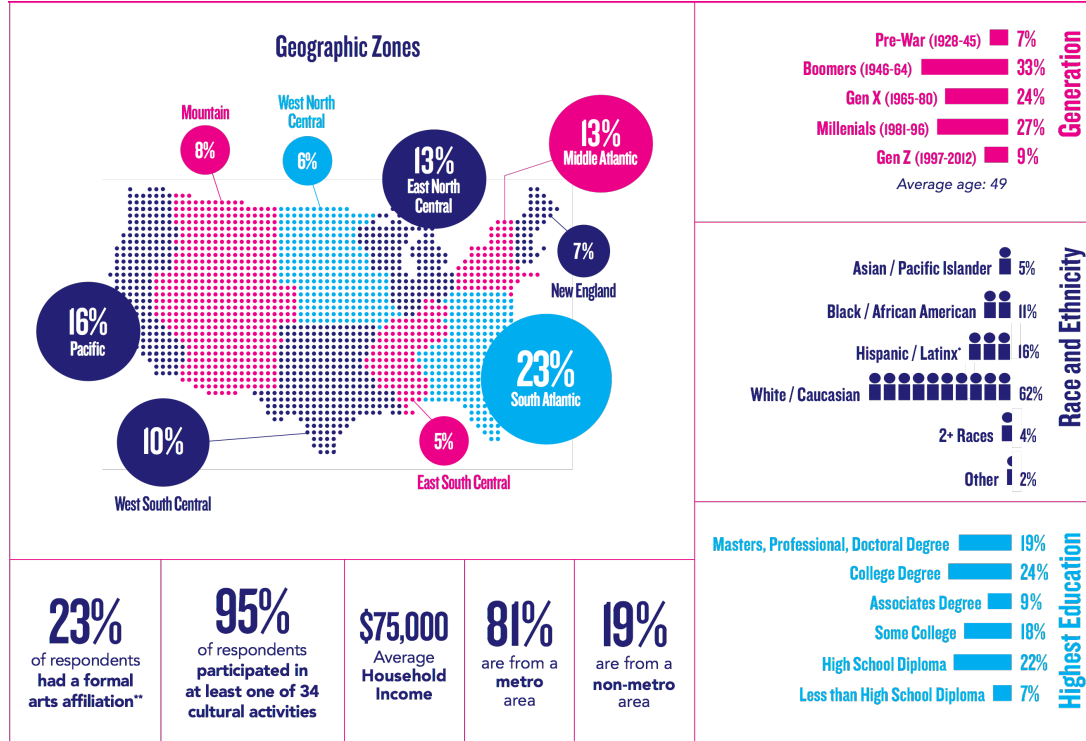
*****Includes Crafts and Services.*

The cultural sector has an inclusion problem.

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

*Data from the 653 participating organizations' respondents.

A National Portrait



*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

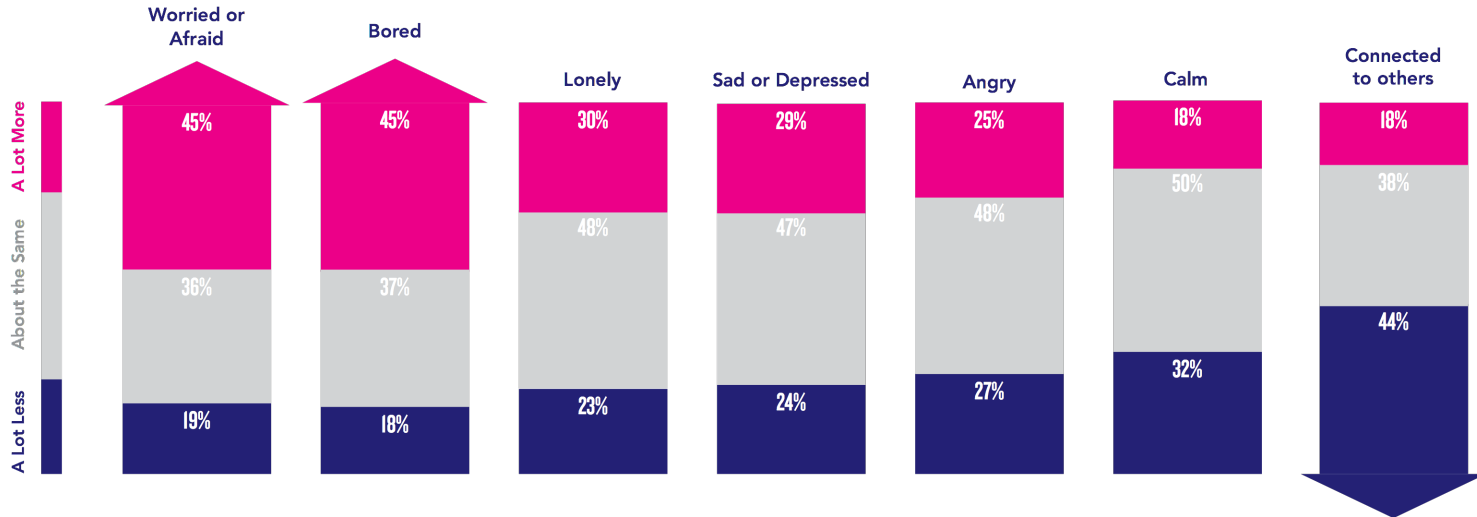
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The Emotional Toll

Q

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.

Respondents report rising feelings of worry, boredom, and disconnection.



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."

2

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.

3

The Role of Digital in Audience Engagement

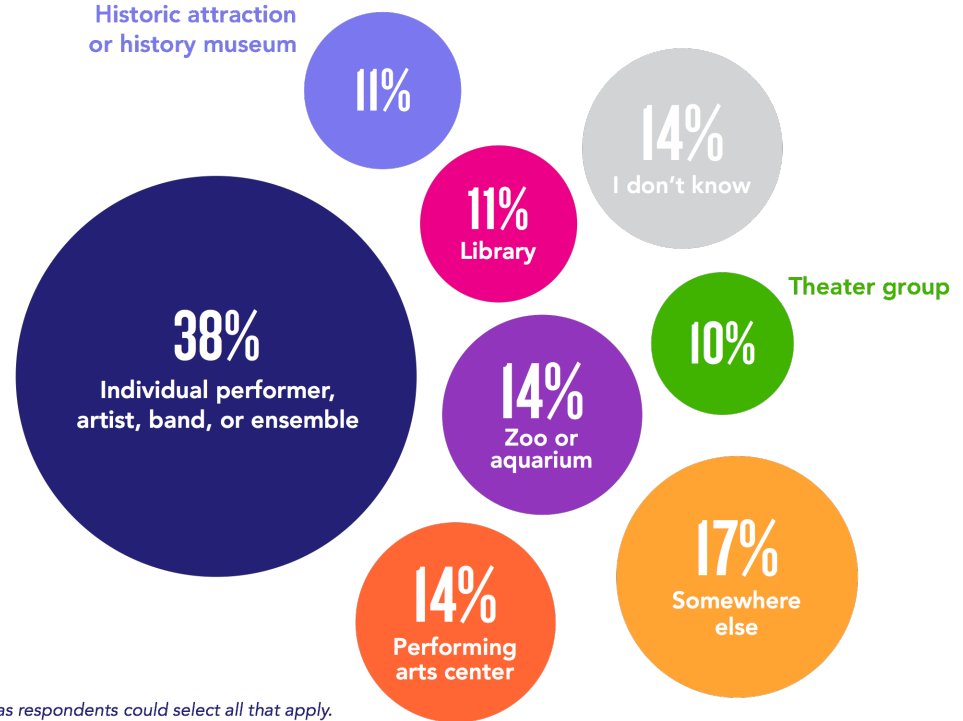
Looking to Content Creators

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.

Q

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

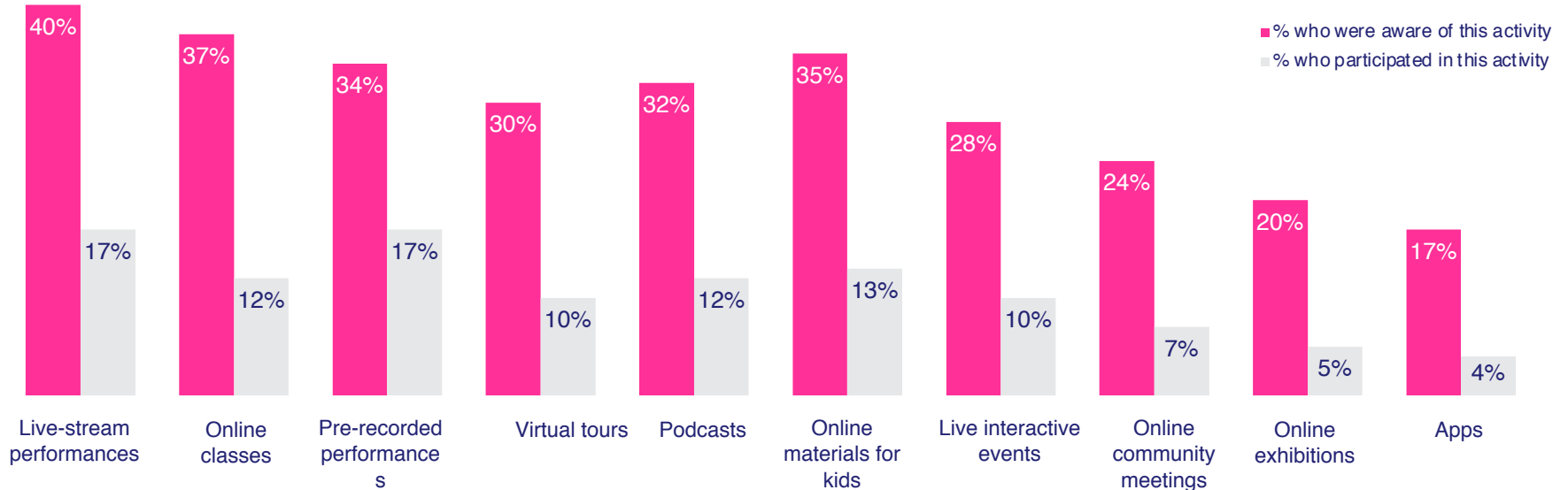


Total exceeds 100% as respondents could select all that apply.

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)



Digital activities are providing critical emotional support and escape during COVID-19.

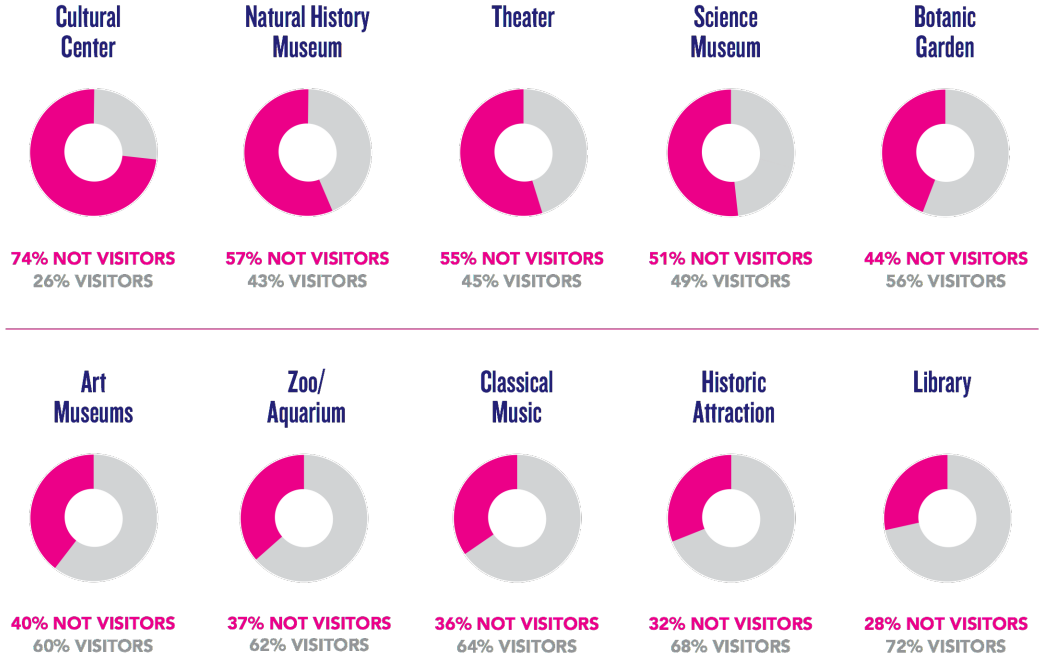
Q: What (if anything) did you get out of doing those online activities? (select up to 5)

- 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

A Virtual Gateway

Many respondents who are using online cultural offerings had not physically visited the same kinds of cultural organizations in the past year.

Breakdown of Digital Users by Content Category and Prior Visitation



Categories are listed in descending order of non-visitors 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.

4

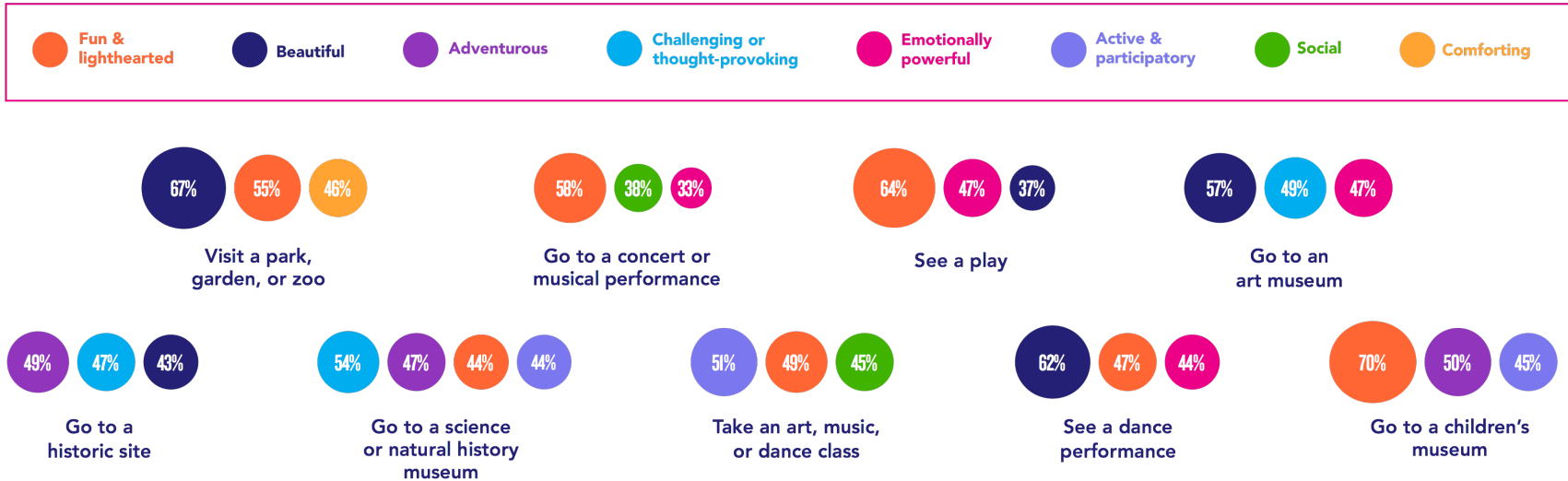
Planning for Future Attendance

Play to Emotional Strengths

Q

You shared that one of the things you're most excited to do is _____. When you do that again, what qualities will you be looking for most from that experience?

Respondents seek a variety of qualities from different cultural experiences, but activities that are fun, lighthearted, and beautiful appeal most.



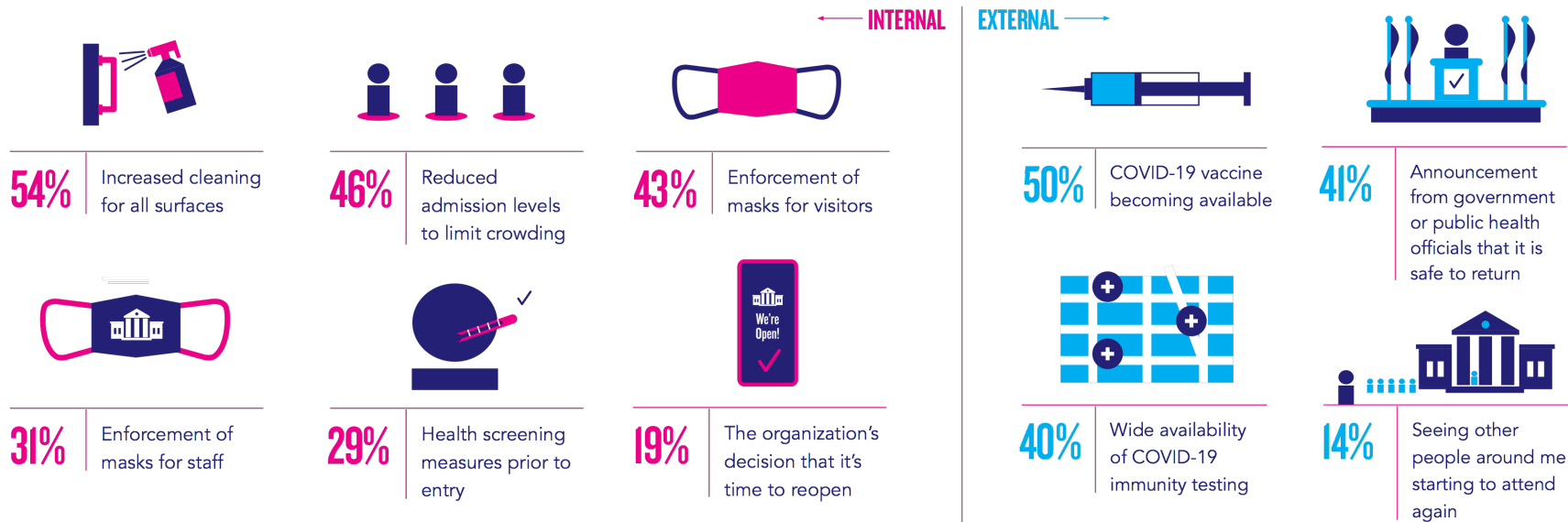
Only the top three qualities for each activity are listed unless qualities were tied.

Protocols for the New Normal

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

Q

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.

28% selected "Nothing—I wouldn't change them at all."



Inclusivity and Community

- 24% Supporting local artists, organizers, etc.
- 24% Friendlier to all kinds of people
- 20% Treat their employees fairly and equitably
- 19% Engage more young people
- 18% More focus on our local community
- 18% More diverse voices and faces
- 15% Working with other nonprofits in our community

Q

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



Enjoyment

- 28% More fun
- 17% Less formal
- 14% More child-friendly



Reflection and Innovation

- 18% Stories or content that connect to my life
- 16% More frequent new works or exhibits

Response patterns were grouped into themes using factor analysis. Total exceeds 100% as respondents could check any that apply.



In Their Own Words

“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.**”

Q: What made those activities valuable for you? We're curious what you enjoyed or found valuable.

“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.**”

Q: What made those activities valuable for you? We're curious what you enjoyed or found valuable.

“
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.”

Q: How would you ideally want arts & culture organizations to help your community during this crisis?
Respondent selected "Other (please specify)."

Discussion

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