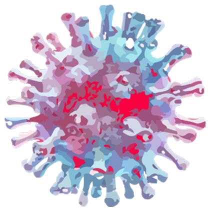
Audience Research: Landscape of a pandemic

Covid on Culture

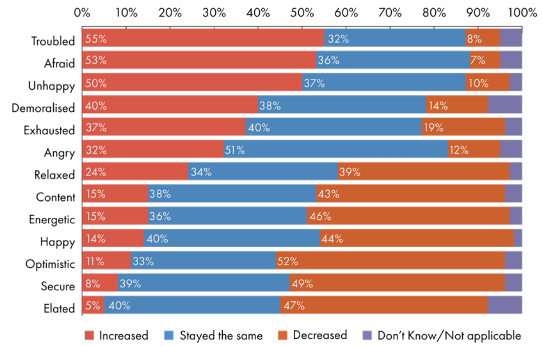


New Audiences

Sector Recovery

The impact of CV-19 on the creative industries has been catastrophic. Shuttered venues, artists without work and audiences without live entertainment. Cultural institutions have needed time and funding to pivot their offering to meet the needs of audiences in lockdown.

Percentage of people reporting change in emotion since lockdown



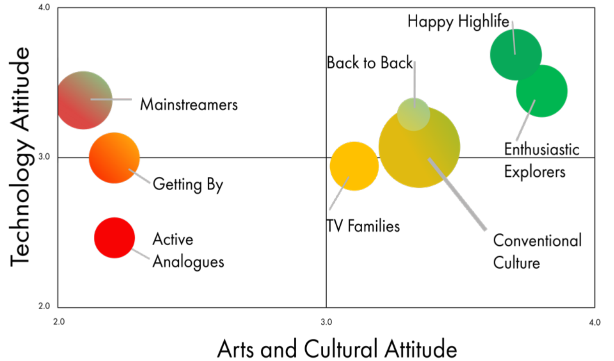
Audiences are feeling an increase in negative emotions, such as feeling troubled and afraid, and a decrease in positive emotions such as happiness and optimism since lockdown.

Our research shows that audiences feel more troubled (55%), they are missing live events and desire uplifting experiences which can temporarily quell the emotional lows of living in lockdown.

Audiences have also expressed positivity towards digital offerings and willingness to spend money on digital content. The need for cultural organisations to understand the opportunities of digital experiences and the challenges some audiences may face in accessing them has never been more important.

i2 media research introduces a new segmentation of audiences highlighting their digital literacy and their cultural engagement to help the cultural sector recover in a post-pandemic world.

i2 media's audience segments plotted by arts and tech attitude



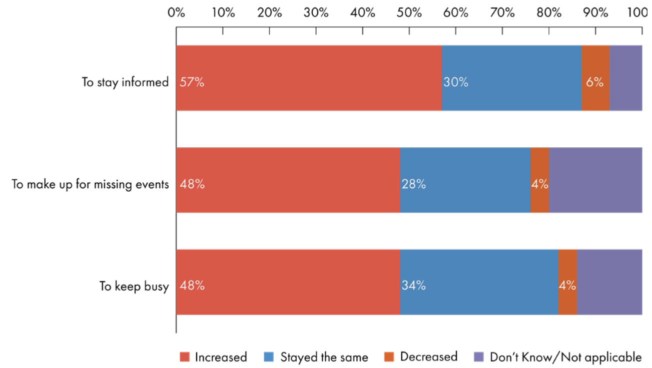
Happy Highlife and Enthusiastic Explorers are highly engaged in arts and culture and positive towards technology, whereas Getting By and Active Analogues are the least engaged with arts and culture and negative towards technology.

To produce the segmentation a survey was distributed to of a nationally representative panel of over 2000 respondents. We queried people's positivity towards and engagement in arts and culture, their digital literacy, attitude and device ownership, and appetite for new forms of content and digital distribution. We also investigated mood and spending habits on digital content before and during lockdown. The segments were derived using attitudinal variables and subsequent analysis overlayed demographics, spending habits and mood.

For a bespoke analysis of how you can take advantage of this segmentation, please get in touch: i2mediaresearch.com

Balancing the needs of audiences whilst generating revenue for cultural organisations will require investment, cross-sector collaboration and knowledge sharing, to achieve widespread sector recovery, we make the following recommendations, to develop:

Change in reasons for using digital since Covid-19



Nearly half of respondents say that they would now engage with digital mediums to make up for missing events.

1. A skills pipeline to support innovative production.
2. The skills and know-how to distribute a range of digital content options to audiences via innovative and widely adopted technology platforms.
3. New business models e.g., testing audiences' willingness to pay for a range of digital content types.
4. Virtual production methods to support remote working and more efficient workflows.
5. A post Covid strategy where digital and live content are synchronously distributed, since the data shows that audiences feel comfortable using digital as an alternative medium to make up for missing live events. Post Covid, this may diversify audiences and increasing reach and access to UK cultural content globally.

UK Research and Innovation
Segmentation of audiences completed by i2 media research as part of the Innovate UK and UKRI funded Audience of the Future programme.

Meet the Audiences

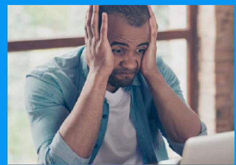
Enthusiastic Explorers


I'm highly engaged in arts & tech. I'm digitally literate & positive about arts & tech. I own many tech products & I enjoy passive, interactive & live experiences. I've been feeling more negative in lockdown & spending more on tech & digital media.

Reach me via:
Social media, word of mouth & my arts network. *

*(*15% work in arts sector)*

Back to Back

I'm a busy city dweller who uses technology to learn & keep busy. I use the internet a lot but find technology overwhelming. I'm reasonably positive about arts & tech & have been spending more since lockdown, especially on streaming services.

Reach me via:
Social media* & online campaigns.

*(*88% have increased usage across Facebook, Instagram and Twitter during lockdown)*

Mainstreamers


I'm not interested in arts & culture, but I'm very interested in and own a lot of technology products. I use tech to help me switch off and be immersed. I'm most likely to be a key worker* and enjoy socialising with friends. I've been feeling more troubled since lockdown and use tech as an escape.

Reach me via:
Social media & online

(Compared to other segments)*

Getting By


I don't really have the means or the inclination to engage in tech & arts. When I do use tech it's most likely I'll use the internet, but my connection speed is not good. I don't feel positive about technology or arts, if I were to engage in digital arts, I would want a passive experience.

Reach me via:
online campaigns with discounted tickets.

Happy Highlife


I'm highly digitally literate, have a lot of tech products at home & very engaged in arts & culture. I'm the most likely to own a VR headset & love new forms of interactive media experiences. I'm well off & happy to spend money on new experiences, especially if they connect me with friends.

Reach me via:
Cultural publications, online, social media, word of mouth.

Conventional Culture


I'm likely retired & I'm interested in traditional arts & culture, like visiting places of interest & going to the theatre. I'm not the most techie, but I'm positive about tech & have been using it more since lockdown. I like passive & live art & have some tech products at home to access content, especially tablets.

Reach me via:
Friends & family, news & radio.

TV Families


I'm relatively interested in arts & tech. I own many tech products, but they tend to be more traditional. I like gaming & watching TV & enjoy passive & interactive experiences. I'm concerned about the privacy of my data and am more likely to engage in arts via trusted technologies.

Reach me via:
Adverts on TV & traditional media or gaming platforms.

Active Analogues


I'm likely over 65* & retired. I'm not optimistic towards or interested in tech & I'm not digitally literate. I'm also not interested or engaged in arts & culture. I'm passionate about social and leisure activities. I keep active by exercising & gardening.

Reach me via:
Traditional media & word of mouth.

(58% over 65 & 56% retired. Oldest of all segments.)*

UK Research and Innovation Segmentation of audiences completed by i2 media research as part of the Innovate UK and UKRI funded Audience of the Future programme.

Audience Research: Landscape of a Pandemic
Beyond Conference 2020

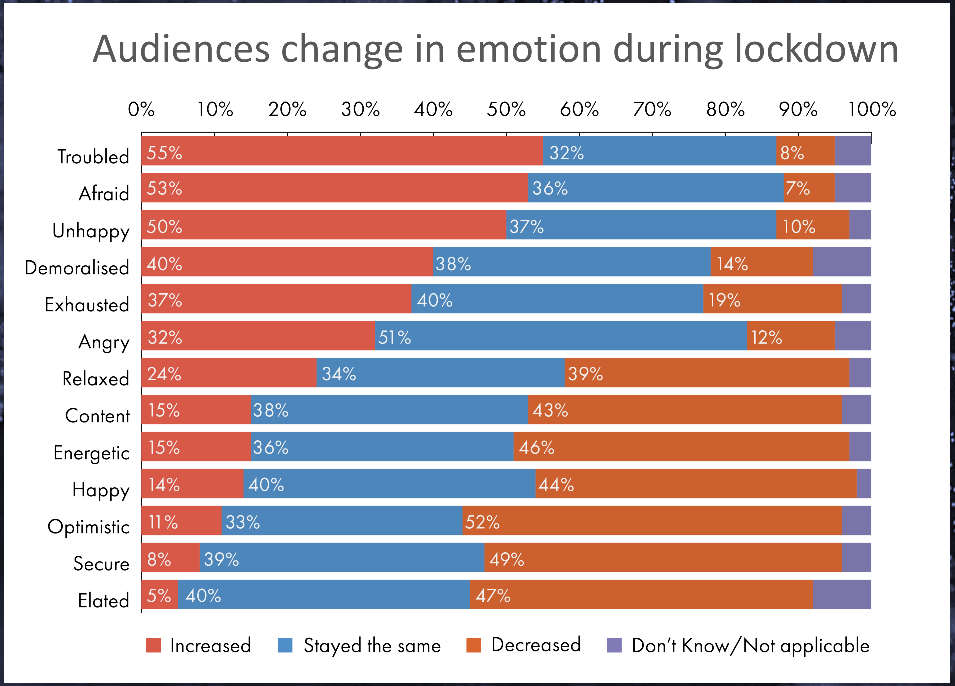
By i2 media research limited and Nesta

23 November, 2020

Covid-19: impact on culture

- The impact of covid-19 on the creative industries has been catastrophic.
- Shuttered venues, artists without work and audiences left without live entertainment.
- Cultural institutions have needed time and funding to pivot their live offering to best meet the needs of audiences in lockdown.

Covid-19: audience needs



- Audiences feel more troubled (55%)
- People are missing live events
- Desire uplifting experiences to quell the emotional lows of lockdown

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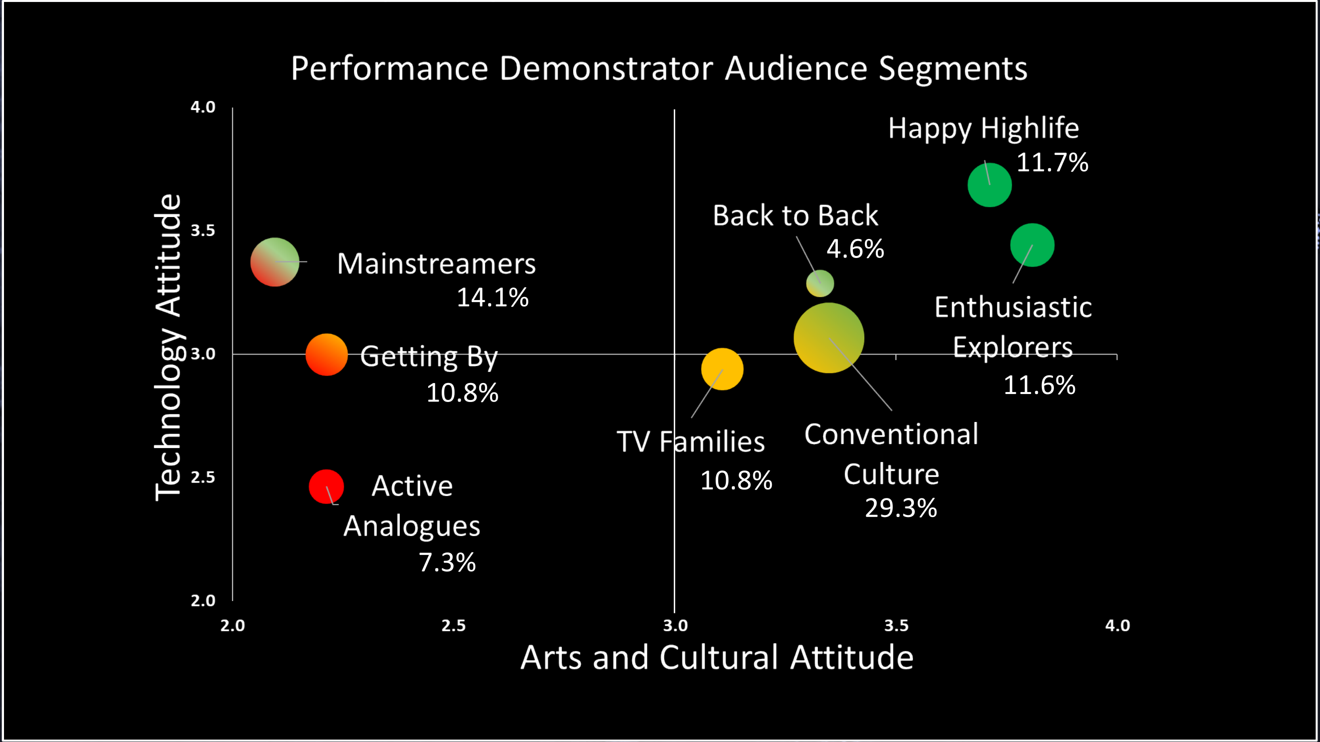
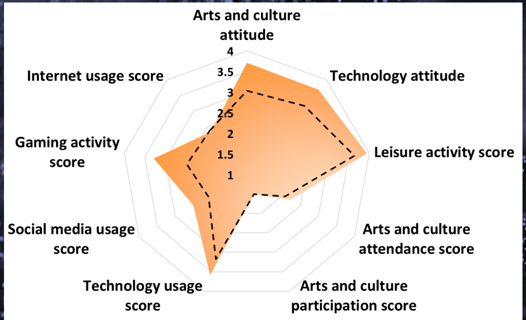
Meet the audiences

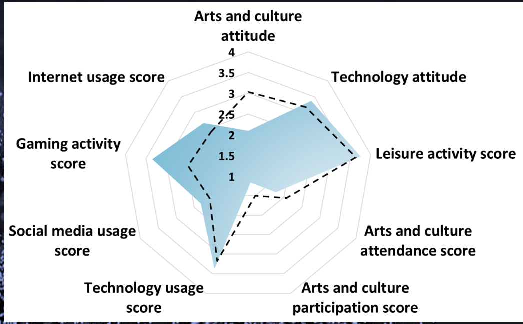


Meet the audiences

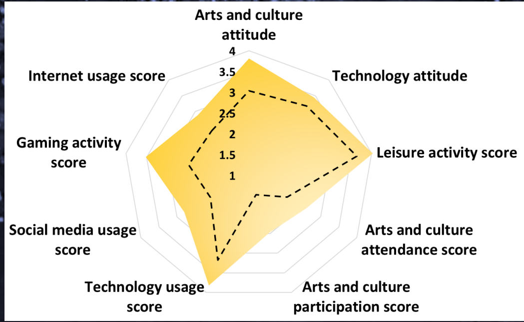
Happy Highlife



Mainstreamers



Enthusiastic Explorers



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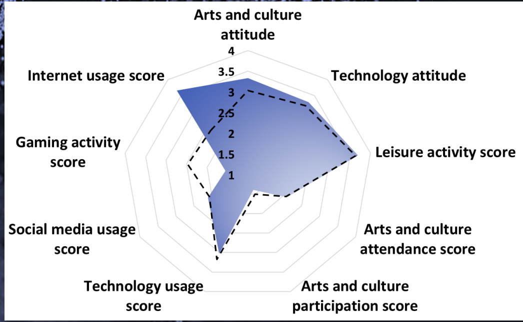

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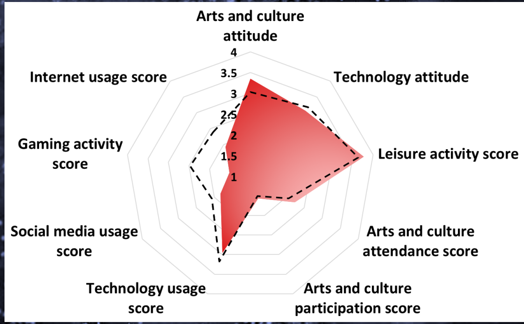
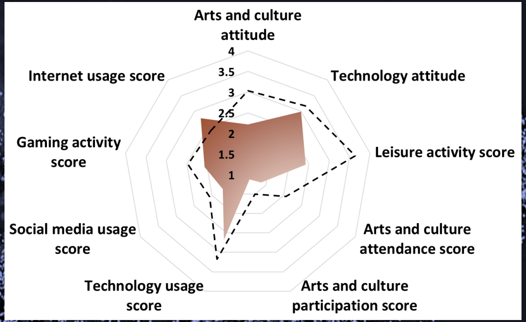
Meet the audiences

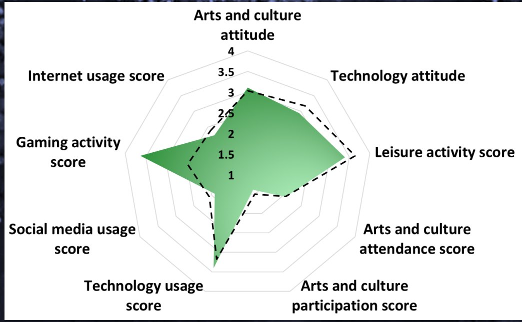
Conventional Culture



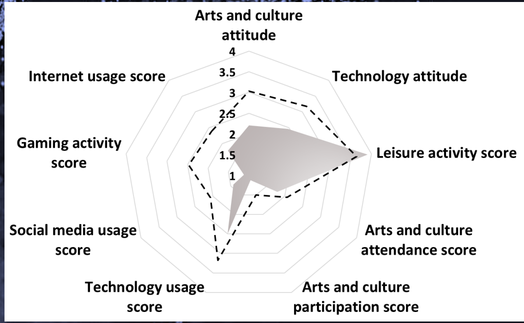
Getting By



TV Families



Active Analogues



Meet the audiences

Enthusiastic Explorers

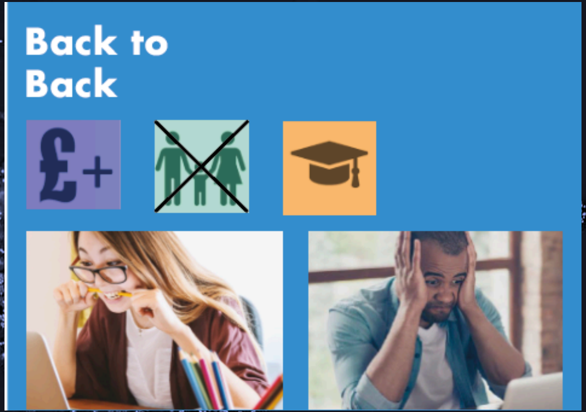
- Very engaged in arts and tech
- Typically younger
- 15% work in arts sector
- Feeling negative in lockdown
- Spending more on digital
- Reach via social & their arts network

Happy Highlife

- Highly tech literate
- Lots of products
- Happy to spend on new experiences
- Most likely to have VR
- Reach via social & traditional cultural publications

Meet the audiences

- Likely retired
- Enjoys traditional culture
- Less tech literate but positive
- Enjoys passive experiences
- Has some devices (e.g, tablets)
- Reach via friends, family, news and radio



- Busy city dwellers
- Uses tech to learn and keep busy
- Can find tech overwhelming although online a lot
- Fairly positive to tech & arts
- Spending more since lockdown
- Reach via social media and online campaigns

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Meet the audiences

- Not interested in arts & culture
- Very interested in technology
- Owns many devices
- Uses tech to ‘switch off/escape’
- Most likely to be a key worker
- Reach via social and online campaigns

- Fairly interested in arts, culture & tech
- Own more traditional technologies
- Likes gaming & TV
- Concerned about data privacy
- Reach via TV ads & traditional media

Meet the audiences

Getting By

- No interest in arts, culture, tech
- Very limited means to engage
- Uses the internet, poor connection
- Not positive towards tech or arts
- Passive experiences only
- Reach via online campaigns, discounts

Active Analogues

- Likely retired and over 65
- Not positive towards tech or arts
- Lowest digital literacy
- Passionate about social / leisure e.g., gardening and exercise
- Reach via traditional media and word of mouth

Sector recovery

Meeting the needs of audiences whilst generating revenue for cultural organisations. Recommendations:

1. Develop a skills pipeline to support innovative production. And,
2. Invest in virtual production methods to support remote working and more efficient workflows.

Sector recovery

3. Develop the skills and know-how to distribute a range of digital content options to audiences via innovative and widely adopted technology platforms.

4. Develop and test new business models e.g., testing audiences' willingness to pay for a range of digital content types.

5. Post CV-19, synchronous distribution of live, in-venue and digitally with diverse audiences and increase reach and access to UK cultural content globally.

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Get in touch

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We offer bespoke consultancy and training services to help any sector develop new audiences and improve engagement.
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