



Arts Insight The National Arts Engagement Survey 2020

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J. 202201



RESEARCH
& INSIGHT





- The purpose of the Arts Insights research series is to establish rigorous statistical measures on the Irish public's **attitudes and behaviours relating to arts and culture**; and how this corresponds with other consumer and lifestyle behaviours.
- The 2020 research builds off the findings from 2018 & 2019.
- **Nationally representative sample of 1,200 adults ages 16+:**
 - ❖ Quota controlled in terms of gender, age, region and area.
 - ❖ Fieldwork was conducted in October/ November 2020.

Arts Insights 2020 was switched to an online approach due Covid-19 related public health restrictions. To support comparisons with the research series to date (conducted via face to face interviews) the national sample of interviews was increased to 1,200.

Arts Insight 2020 Sample Profile

Base: Adults aged 16+ n – 1,262



| | | 2020 % |
|--------------|--------|--------|
| Gender | Male | 49 |
| | Female | 51 |
| Age | 16-24 | 14 |
| | 25-34 | 16 |
| | 34-49 | 28 |
| | 50-64 | 23 |
| | 65+ | 18 |
| Social Class | ABC1F | 49 |
| | C2DEF | 51 |

| | | 2020 % |
|--------|-------------|--------|
| Region | Dublin | 29 |
| | ROL | 27 |
| | Munster | 27 |
| | Conn/Ulster | 18 |
| Area | Urban | 66 |
| | Rural | 34 |



ARTS ATTENDANCE

- The impact of Covid-19
- What have we done instead?
- Our alternate activities have not adequately filled the vacuum left by live arts events.
- We clearly want to return to live events (and we can prioritise what we need for that return).



ARTS PARTICIPATION

- Participation levels increase in 2020.
- The motivations of enjoyment, self-expression and wellbeing.
- We have adapted through switching to online and blended forms of participation.
- However, the new approach has compensated only in part.



ARTS SEGMENTATION

- The importance of Aficionados.
- 'Regulars' within the Arts Sector are not to be underestimated however.
- Age differences among Aficionados & Regulars.
- Aficionados are the key target for paid online events.



ATTITUDES TO THE ARTS

- Soft National Support for the Arts.
- And support declines in 2020.
- The sharpest falls relate to the role of the arts in communities and society.
- Mental Wellbeing Issues are significant and most closely associated with age.



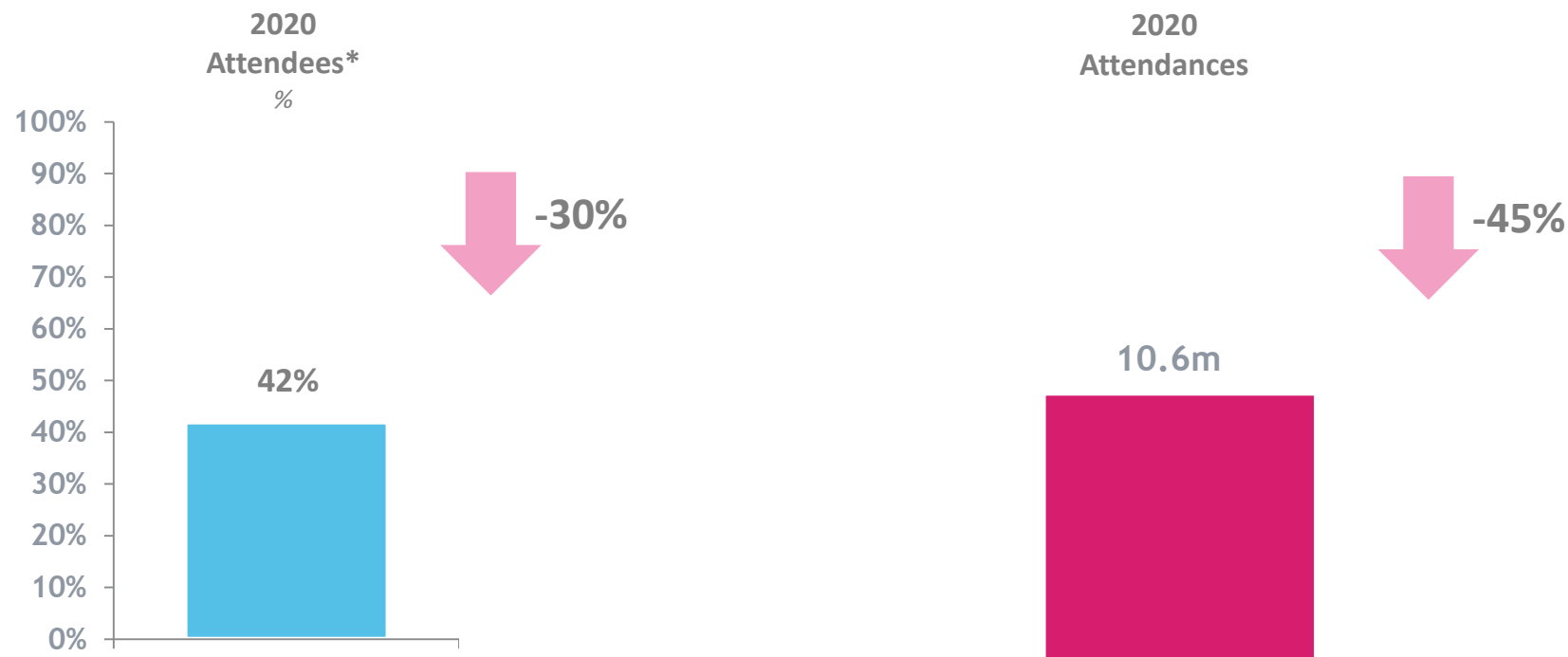
Arts Attendance

Arts Insight 2020

Arts attendance past 12 months 2020: The Impact of COVID 19

Base: Adults aged 16+ n – 1,262

Throughout this survey we would like you to think back over the past 12 months: from October 2019 to now. Think of the past 12 months in full, including before and after the Covid 19 crisis in Ireland.



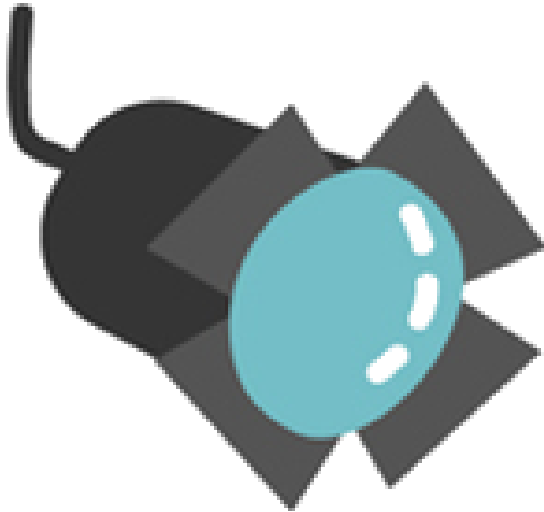
Incidence of attendees at arts events typically funded by the Arts Council is down by 30%; number of attendances is down 45%

* Based on Arts Council Funded Event Attendance: events traditionally funded by the Arts Council: excludes films, musicals, stand-up comedy, rock or popular music

Q.2 In the past 12 months, have you been to any of these events?

Q.4 Which of the following best describes how often you have attended (INSERT FROM Q.2) in the past 12 months? Think of the past 12 months in full, including before and after the Covid 19 crisis.





*Incidence of attendees at arts events typically funded by the Arts Council is **down by 30%**. Number of attendances is **down 45%***

What have we done instead?

Striking rise in watching or listening to ‘Arts & Cultural programmes’

Base: Adults aged 16+ n – 1,262

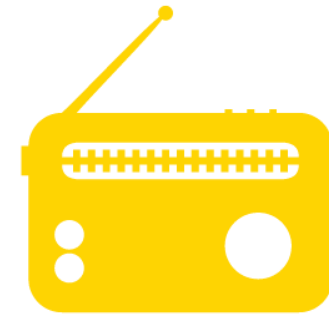
Watched or listened to ‘Arts & Cultural programmes’



75%
on television
(up from 65%)



60%
online
(up from 27%)



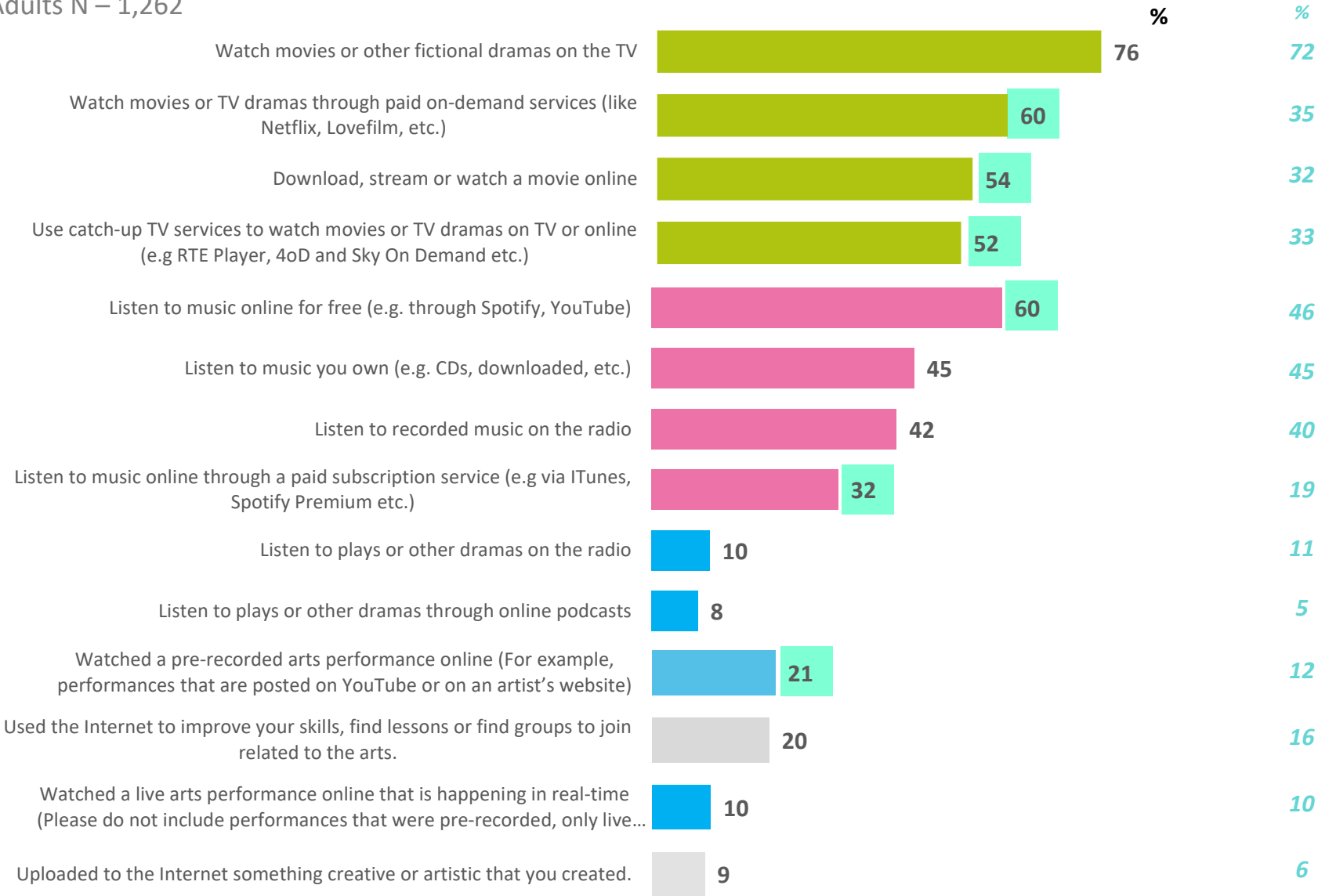
58%
on radio
(up from 52%)

Strong increase in our use of on demand media generally

2018/19 Avg



Base : All Adults N – 1,262



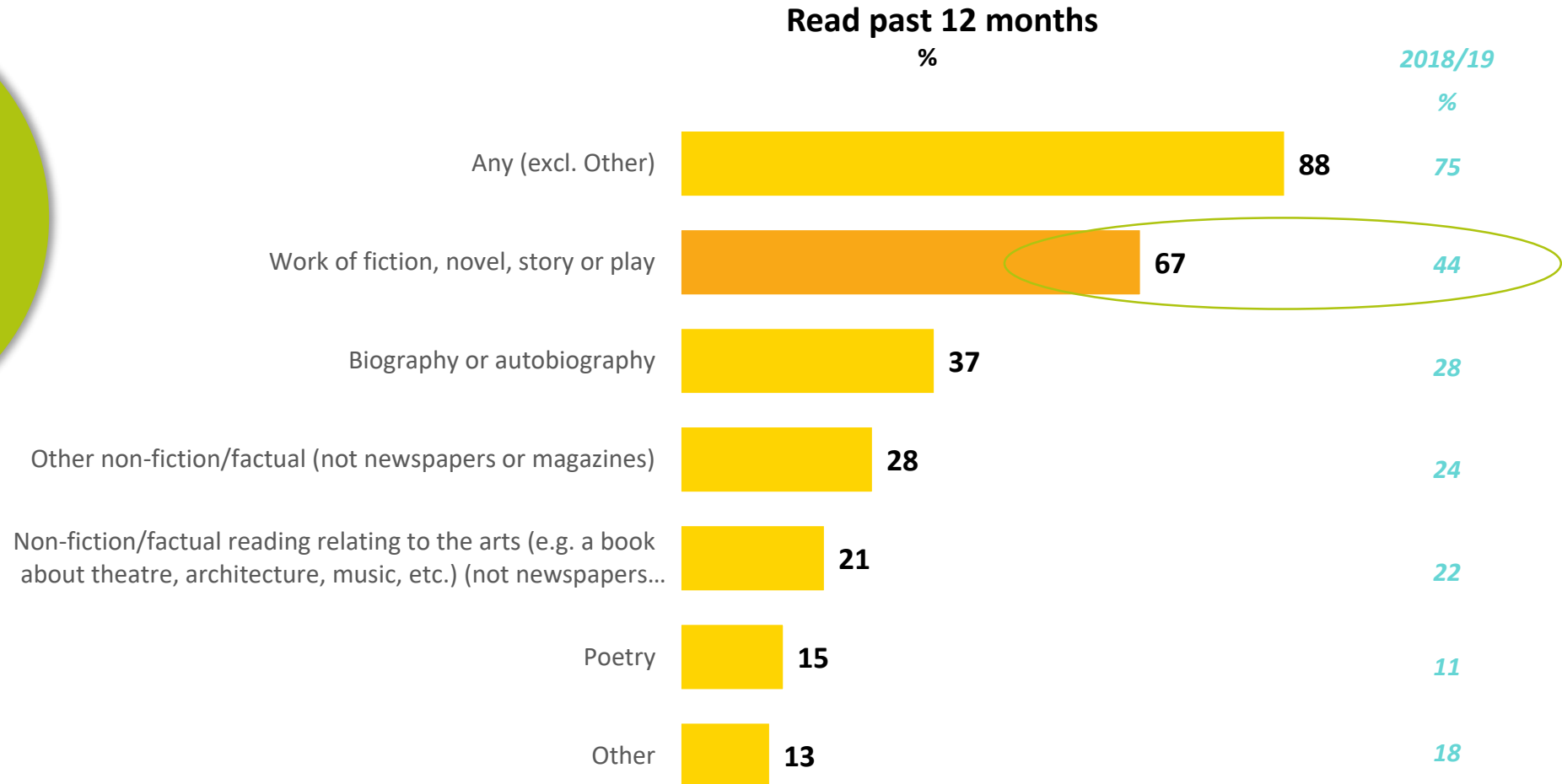
The rise in online engagement is confirmed with striking rises across a range of online activities.

We are also reading more

Base : All adults 16+ n-1,262



59% of readers are doing so 'more often' *since the start of the Covid-19 crisis*

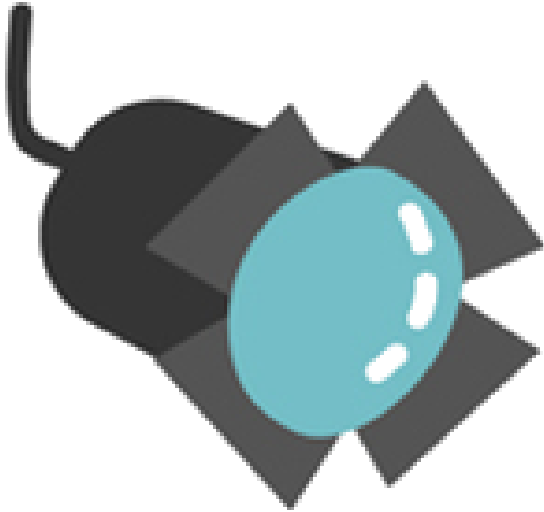


There has been a 23% rise in the incidence of Irish adults who are reading works of fiction, novels, stories or plays (67% have done so in the past 12 months vs 44% previously)

Q.1b Now since the start of the Covid 19 crisis in Ireland, so from March this year, have you taken part in each of these more often, less often, about the same or stopped all together?

Q.20a Now thinking of reading for pleasure, have you read any of the following in the past 12 months?





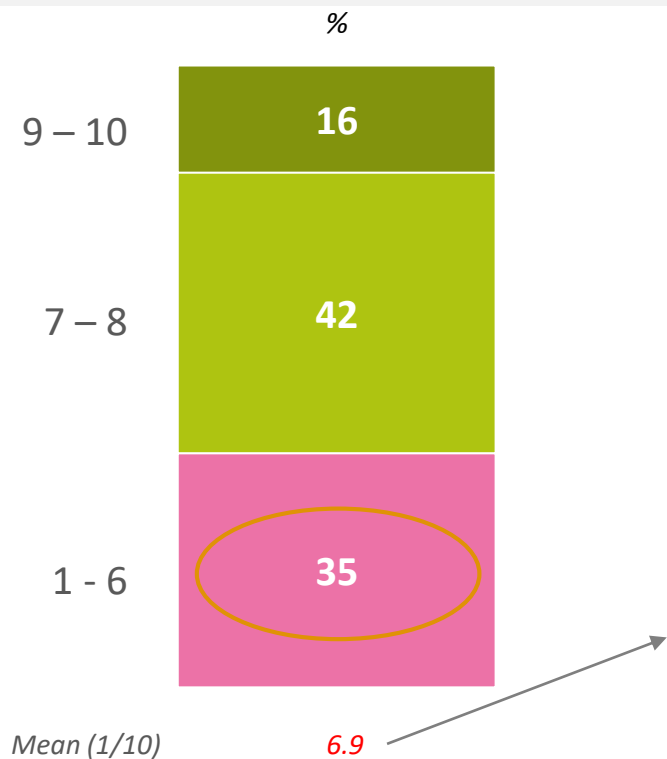
However, our alternate activities have not adequately filled the vacuum left by live arts events

35% are actively dissatisfied with the quality of the arts & cultural programme they have experienced Online since March



Base: watch/listen to Arts + Cultural programmes online N - 638

Q. And how satisfied are you with the quality of the arts & cultural programme you have watched or listened to Online since the start of the Covid 19 crisis, so from March this year? Please rate it on a ten point scale where ten means extremely satisfied and one means not at all satisfied.

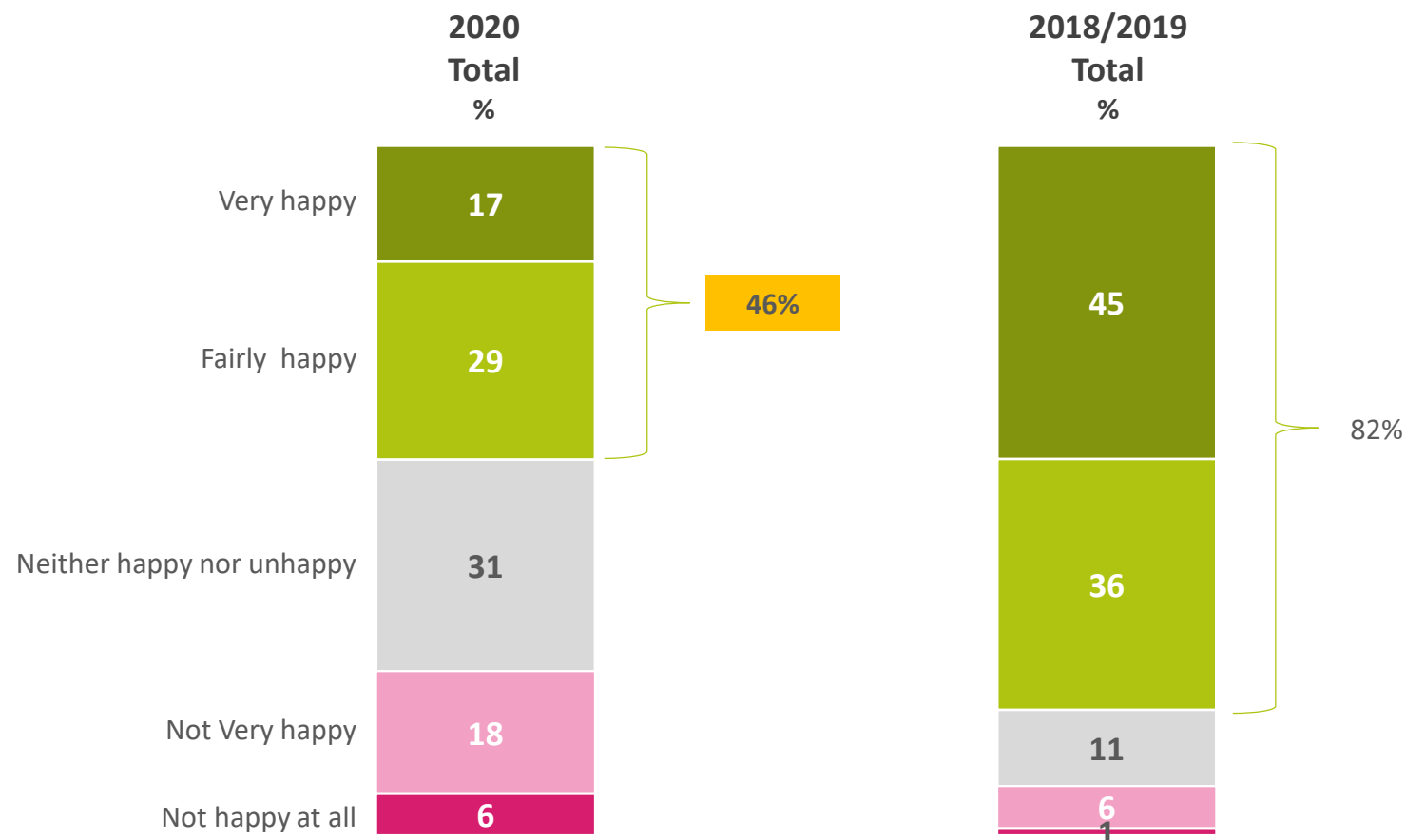


| | (1/10) |
|-----------------------------------|--------|
| Total | 6.9 |
| Age | |
| -34 years | 6.6 |
| 35-49 years | 6.6 |
| 50+ years | 7.3 |
| Aficionados | 7.4 |
| Online use more often since March | 7.2 |

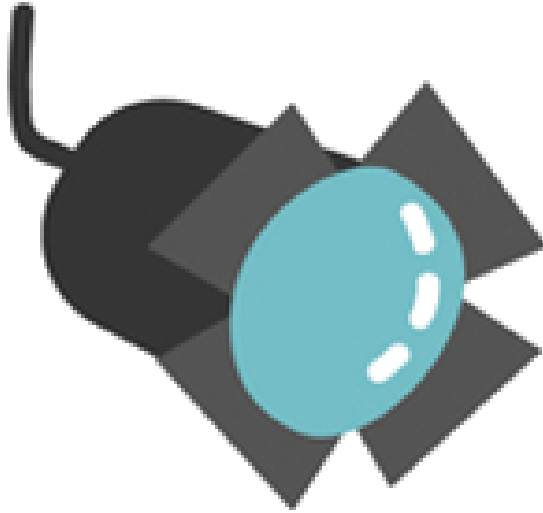
Satisfaction levels with the online arts experience since March is modest; only the senior age group + Aficionados give a significant rating above 7/10. An inherent danger being that online arts are attracting new users only to turn them off with the quality.

Satisfaction levels with live Arts attendance have collapsed from 82% to 46% in 2020

Base : All Adults aged 16+ n- 1,262



We clearly want to return to live arts events.

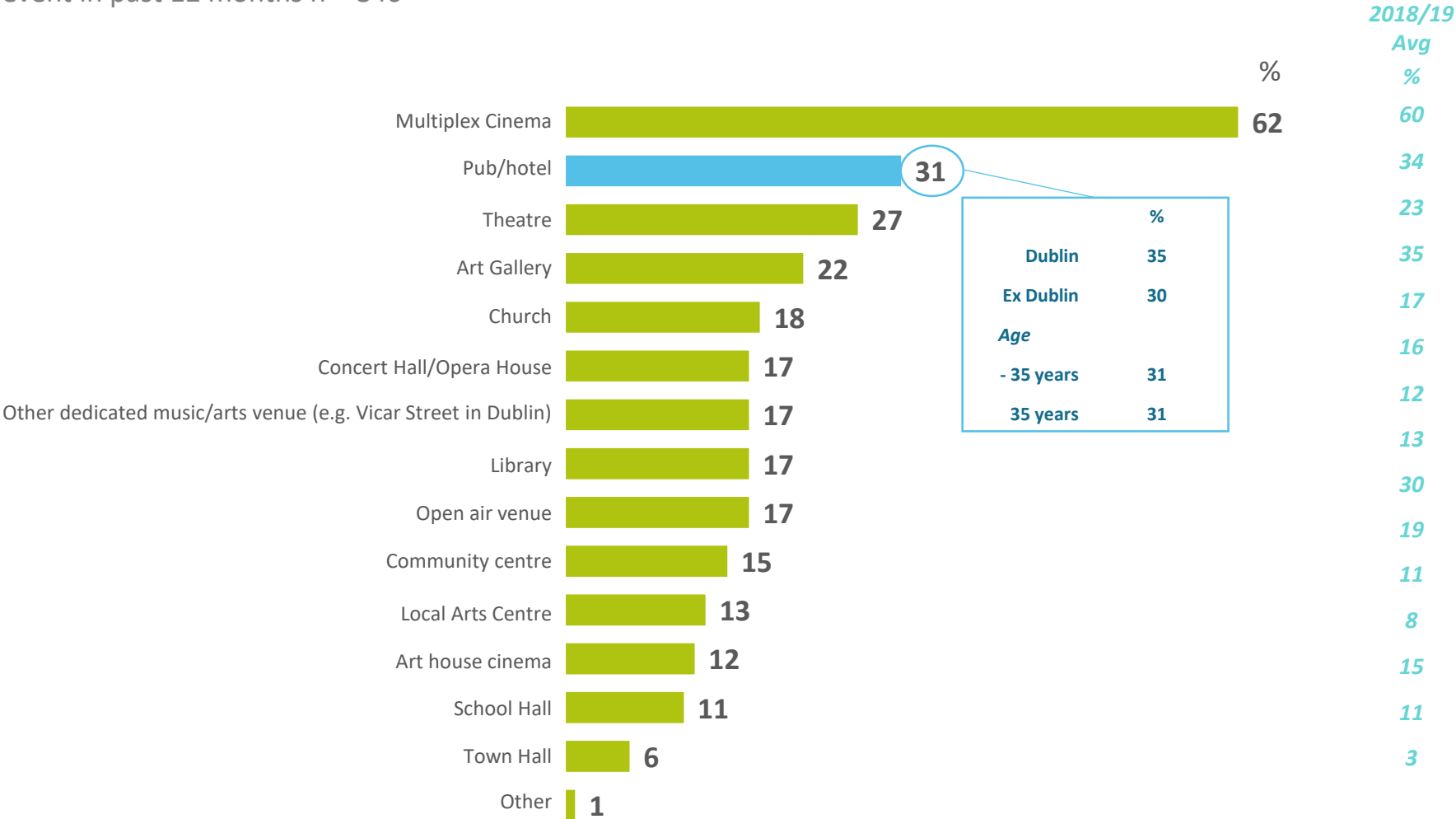


Planning for the Return to Arts Venues

Pubs/ Hotels are key national venues for attending Arts events



Base: Attended any event in past 12 months n – 846



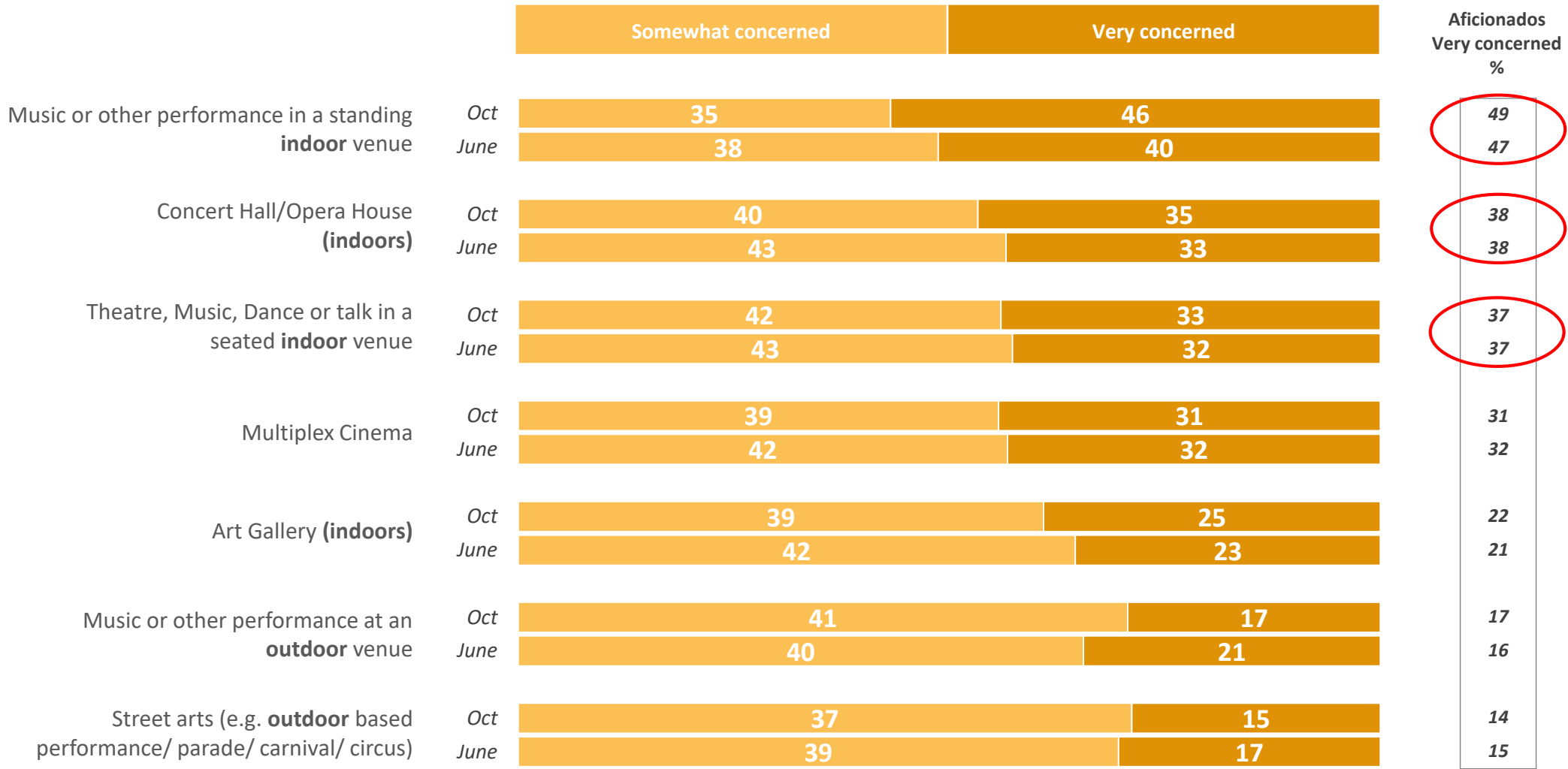
Pubs/ Hotels are second only to Multiplex Cinemas in terms of attendance

*includes Art House Cinema, Concert Hall/ Opera House, Local Arts Centre, Art Gallery, Theatre
J.202201 | The Arts Council | Arts Insight 2020 | Dec 2020

Aficionados are typically the most concerned with attending indoor arts events



Base: All adults aged 16+ n – 1, 043

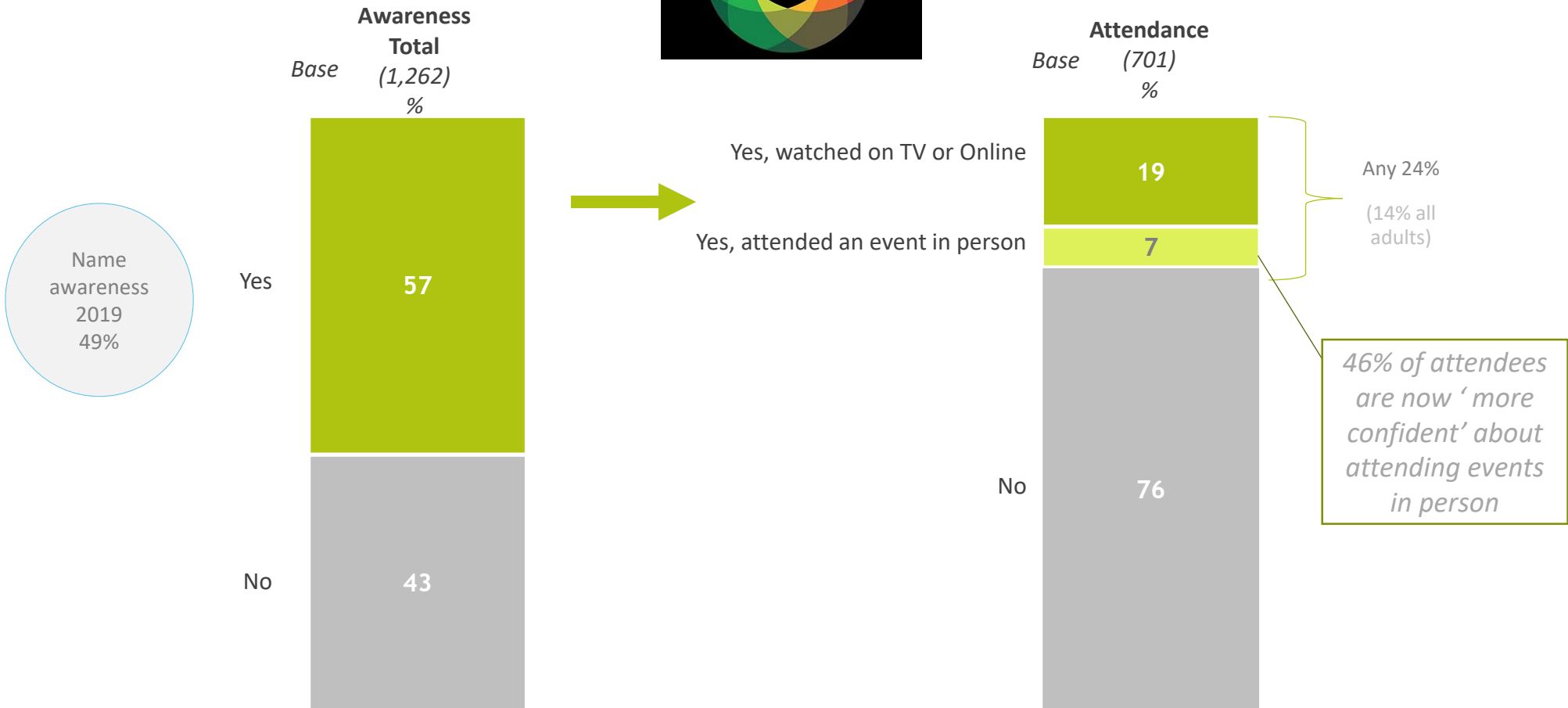


Our general levels of concern attending indoor venues in particular remain very high; however levels can show a slight decline since June.

*Arts Council 'Arts during COVID - 19' National Survey October 2020

Culture Night 2020

Base : All adults 16+ n- 1,262

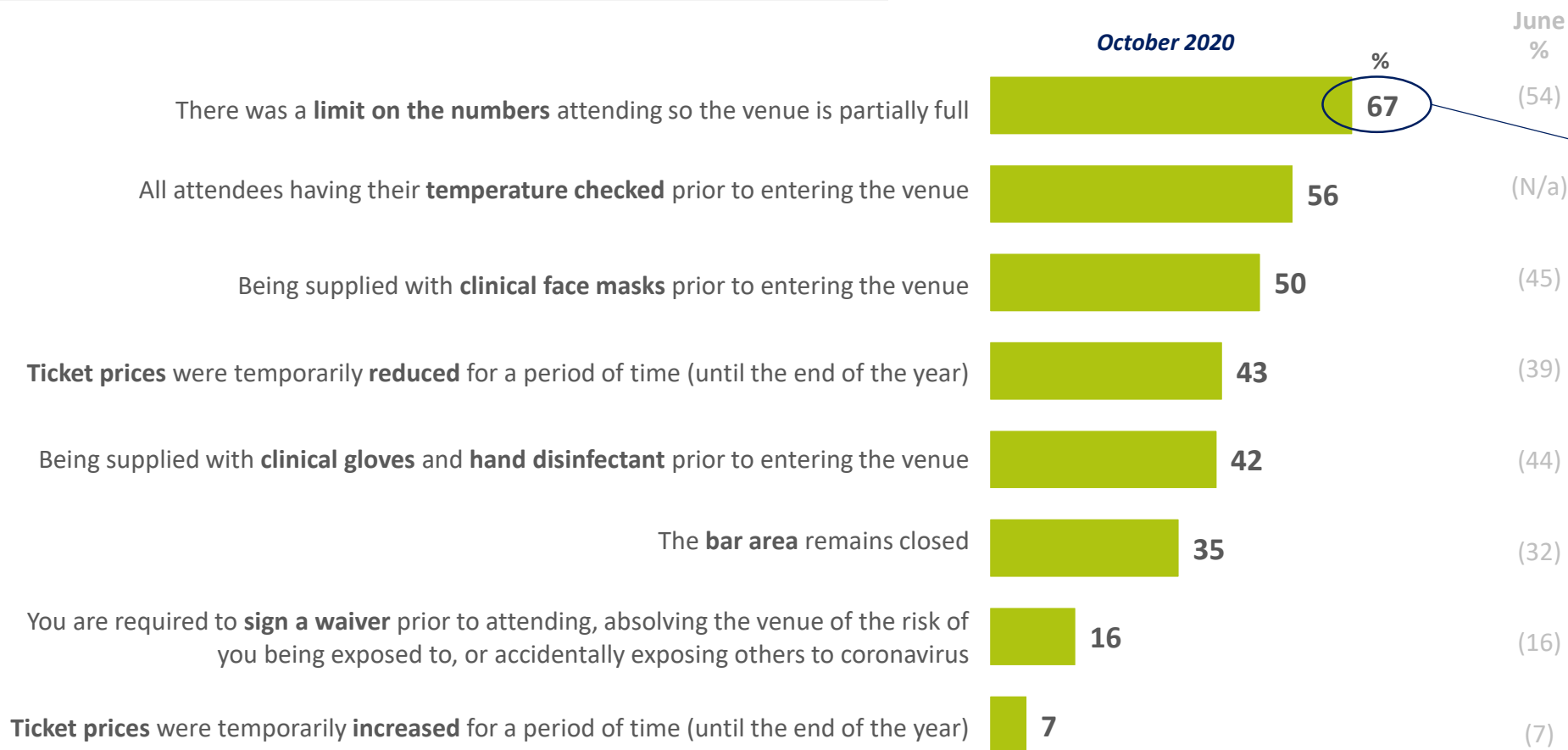


Awareness for Culture Night has risen to 57% of Irish adults; with 14% viewing the event in some form. Awareness and attendance levels are largely consistent demographically.

What can venues do to encourage attendance?

Base: Adults aged 16+ n – 1043

More likely to visit a venue for a live arts performance if ...



Almost half the population would be happy to go back to live events before all restrictions are lifted. However, capacity will be a big determinant: 50% capacity is the point where most people start feeling comfortable (*Ref. Shaping Ireland's Future: Entertainment & The Arts; November 2020*)

The reassurances provided by limited numbers, face masks and discounts has increased since June; note also the prominence of 'temperature checks'.

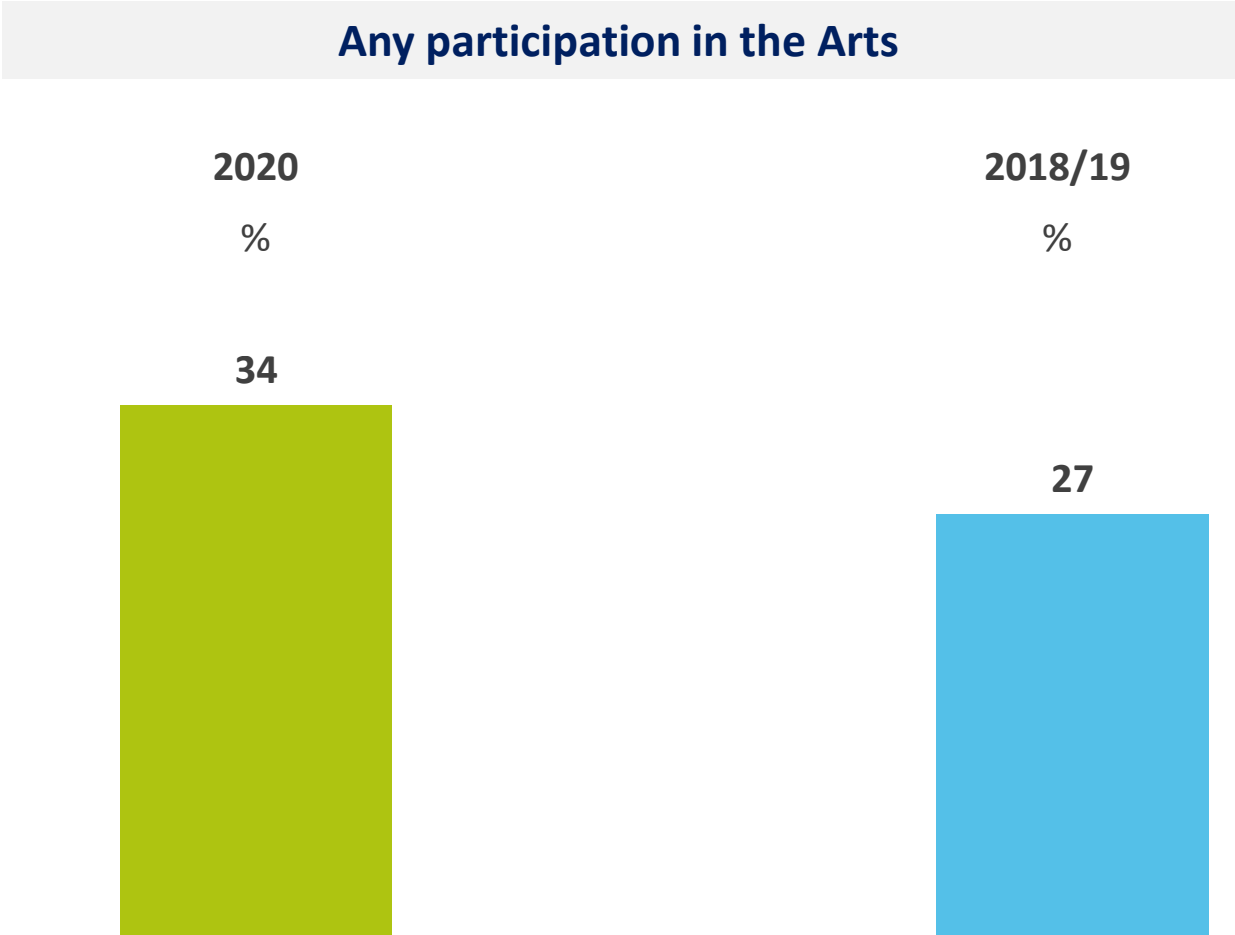


Participating in the Arts

Arts Insight 2020

Participation levels increase in 2020

Base : All Adults aged 16+ n- 1,262

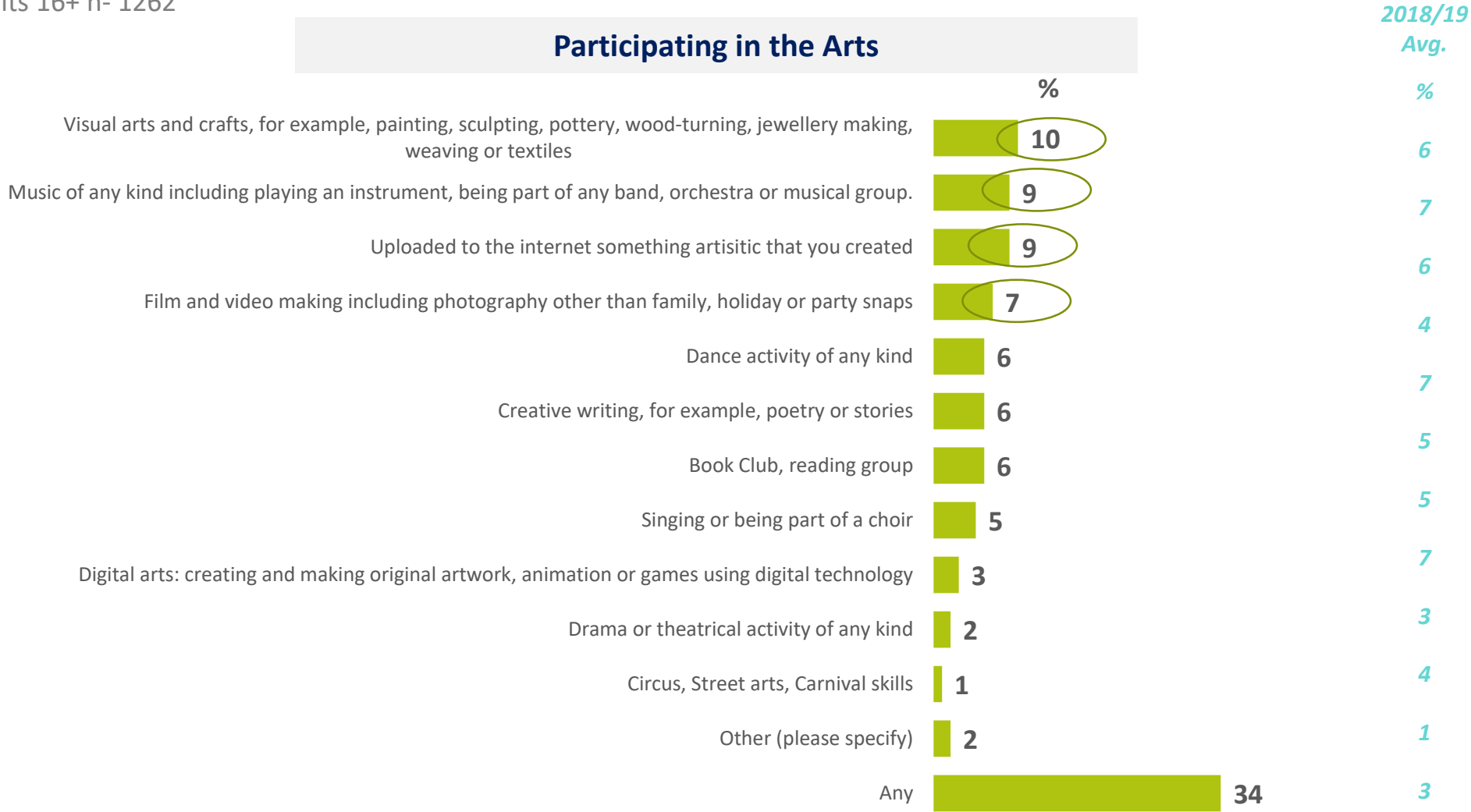


In the year of the pandemic participation in the arts appears to have actually increased.

Rises in specific activities include: visual arts & crafts; films & video making; and in uploaded to the Internet something creative or artistic that you created



Base : All adults 16+ n- 1262

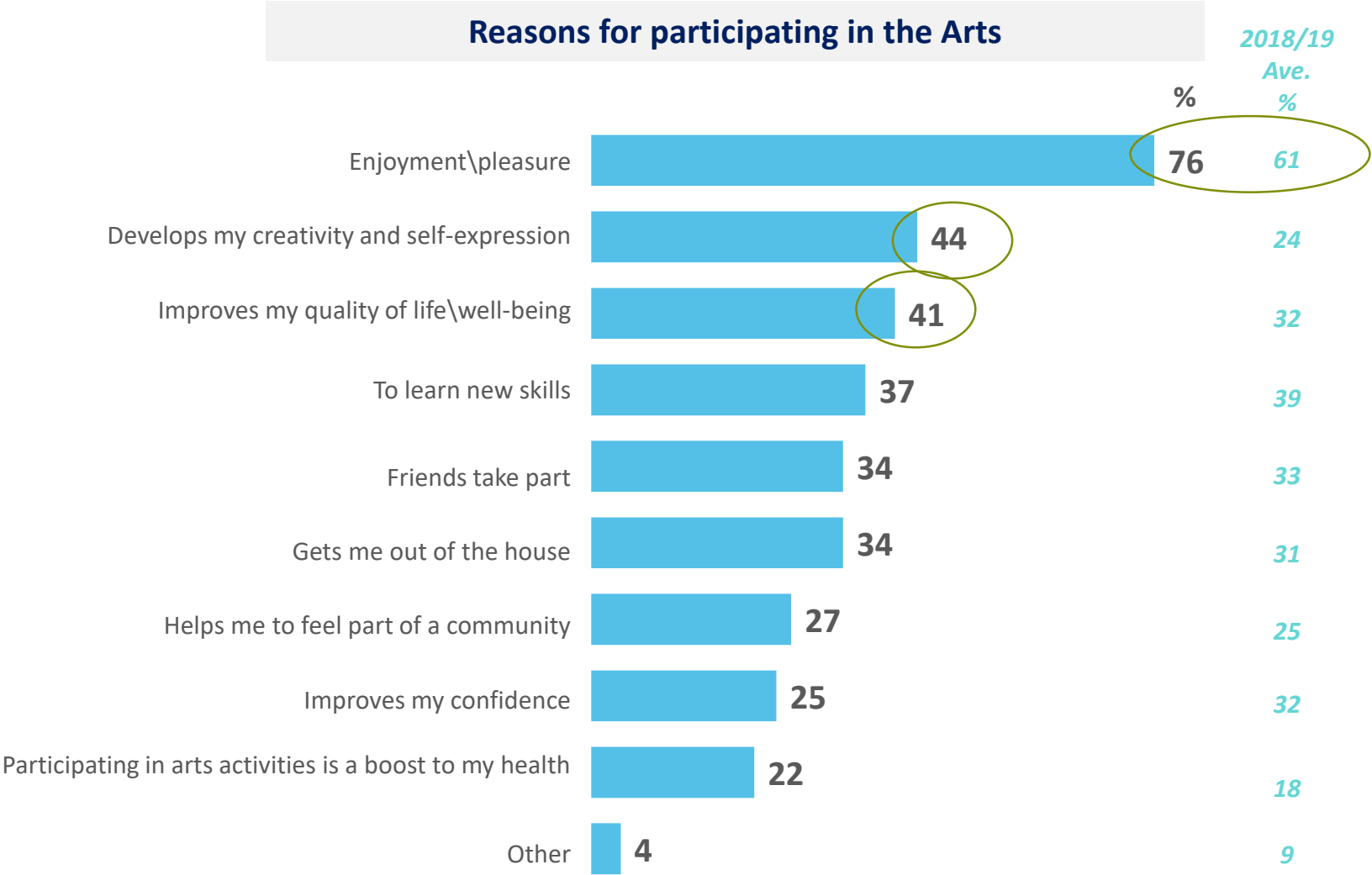


Rise in participation is evident across every demographic group/ and section of arts goers: peaks among Aficionados (57%) and ex Dublin (43%)

The motivations of enjoyment, self-expression and wellbeing are the top ranked reasons for participation in the extraordinary year of 2020.

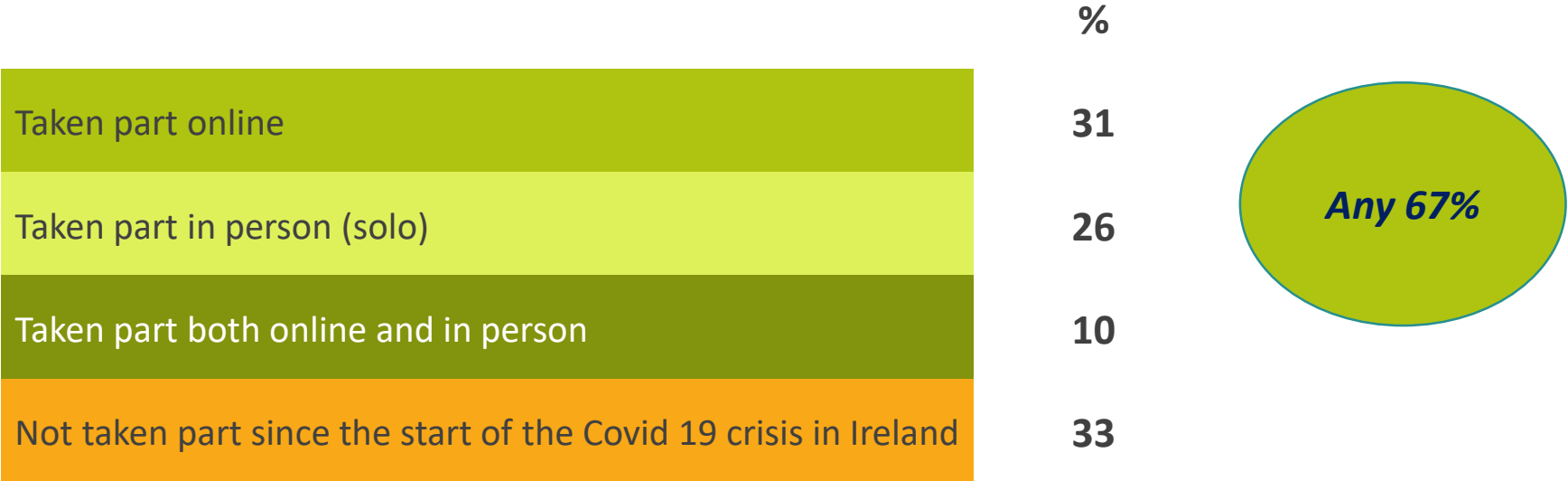


Base : Arts Participants n - 450



We have adapted through switching to online and blended forms of participation

Base: Participate in any Arts activity N - 450

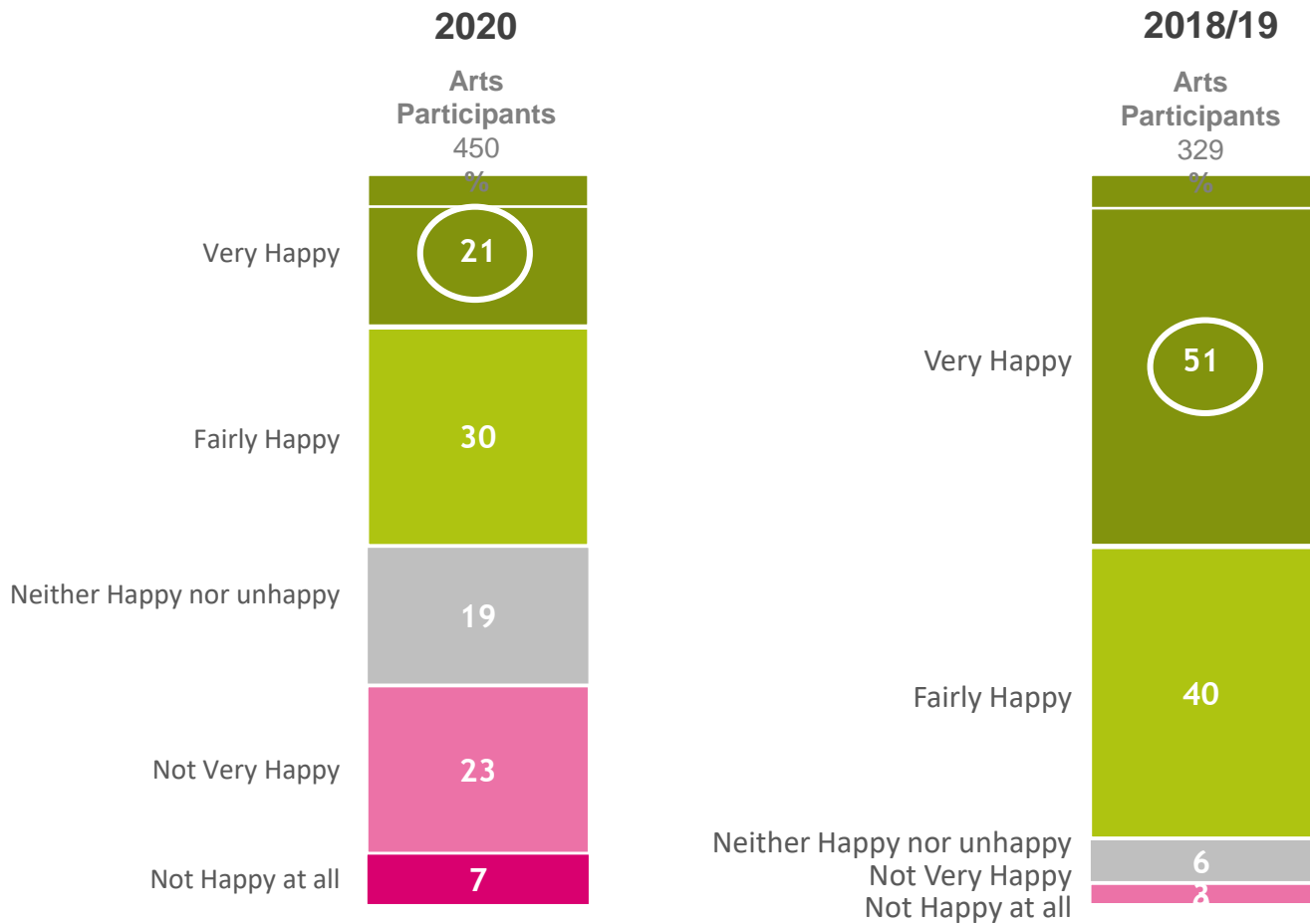


Only 1 in 3 have stopped participating due to the pandemic; 67% of participants have continued to do so.

However, the new approach to participation has compensated only in part

Base : All adults aged 16+ n-1,262

Happy with level of participation in the Arts



Levels of unhappiness with participation rates (and forms) has increased significantly: satisfaction down from 91% of participants to 51% in 2020

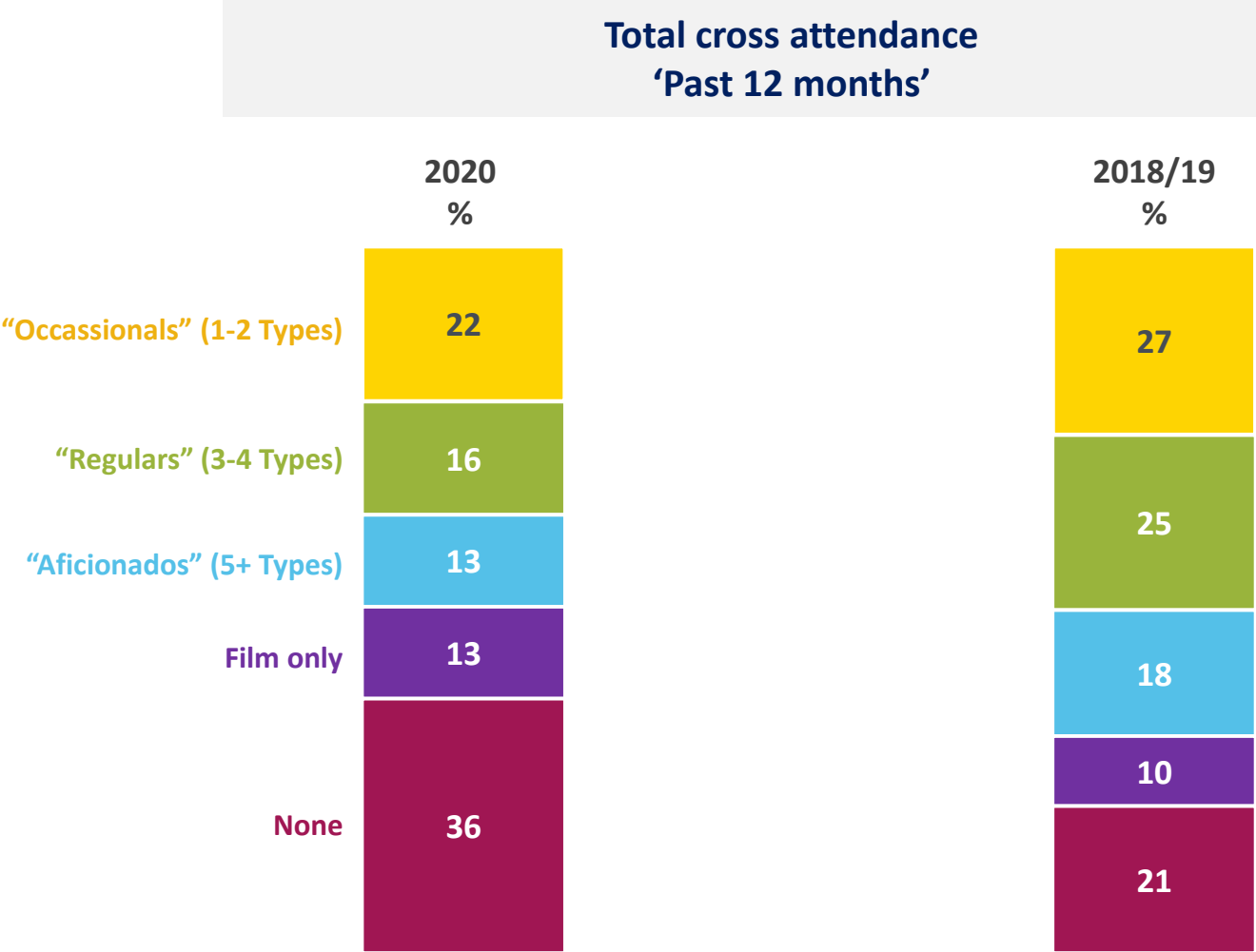


Arts Attendance Segmentation

Arts Insight 2020

The importance of Aficionados

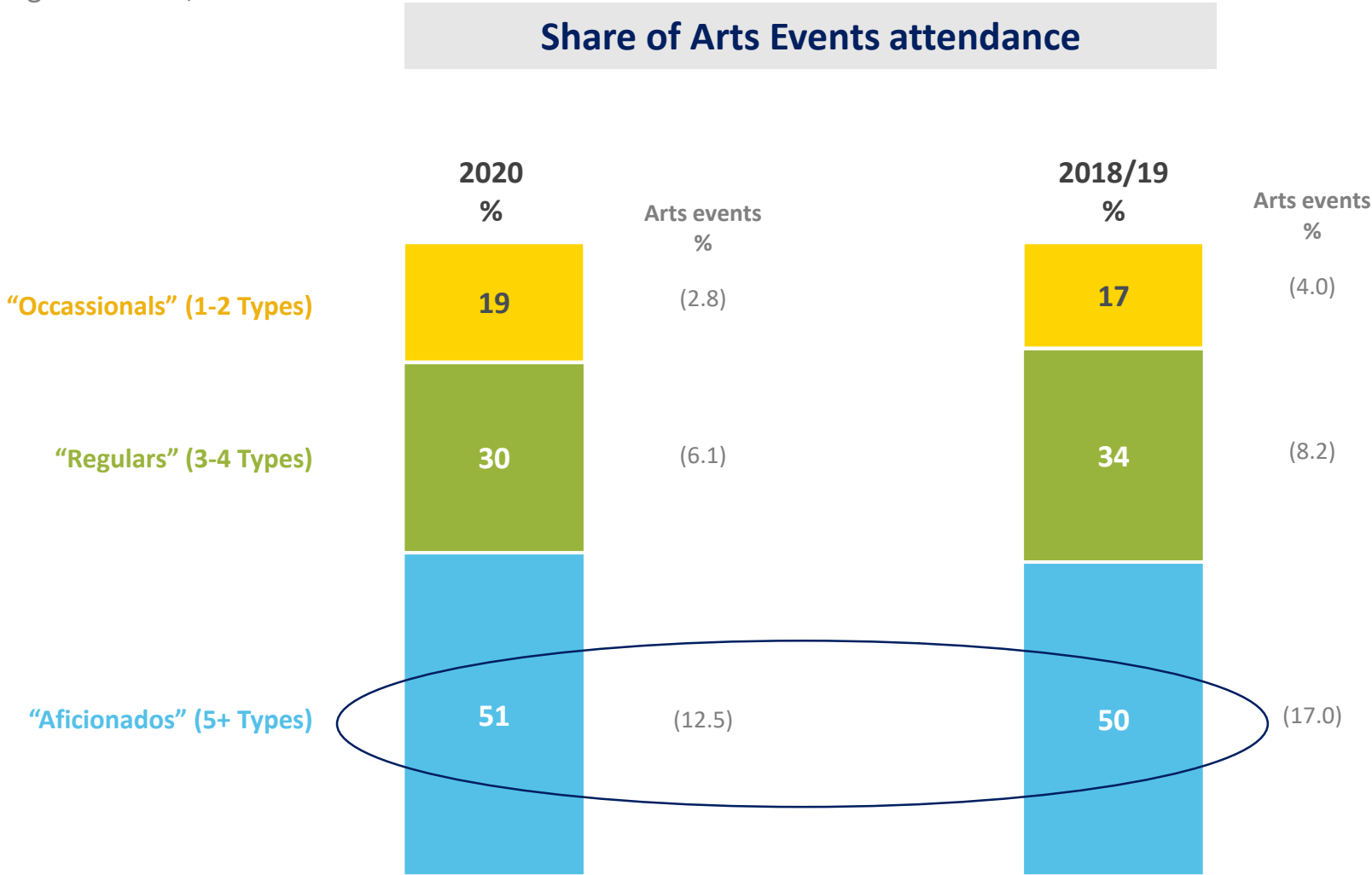
Base : All Adults aged 16+ n- 1,262



The incidence of Aficionados has declined to 13% in 2020

The importance of Aficionados

Base : All Adults aged 16+ n- 1,262

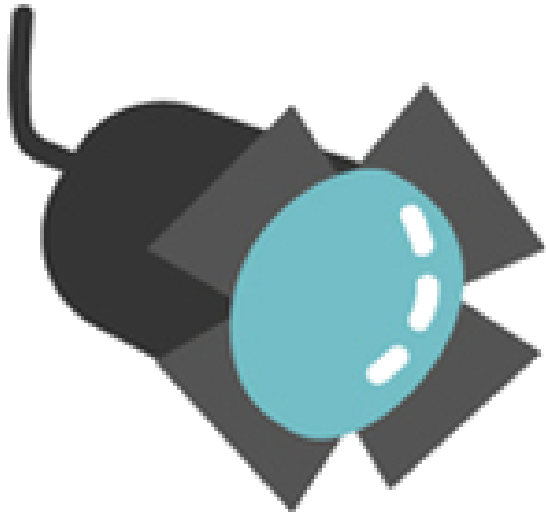


However, Aficionados continue to account for c. 50% of all attendances.

The demographic differences across the segments are rarely statistically significant

Base: All Adults aged 16+ n – 1,262

| | Total | Any Arts Goers | Occasionals | Regulars | Aficionados | Films (only) | None |
|---------------------|-------|----------------|-------------|----------|-------------|--------------|------|
| UNWTD | 1262 | 671 | 282 | 213 | 176 | 174 | 417 |
| | % | % | % | % | % | % | % |
| Gender | | | | | | | |
| Male | 49 | 49 | 53 | 43 | 50 | 45 | 50 |
| Female | 51 | 51 | 47 | 57 | 50 | 55 | 50 |
| Age | | | | | | | |
| 16-24 | 14 | 14 | 13 | 16 | 13 | 23 | 12 |
| 25-34 | 16 | 18 | 22 | 16 | 14 | 20 | 12 |
| 34-49 | 28 | 29 | 27 | 31 | 29 | 32 | 26 |
| 50-64 | 23 | 23 | 25 | 23 | 20 | 17 | 25 |
| 65+ | 18 | 16 | 13 | 14 | 23 | 8 | 25 |
| Social Class | | | | | | | |
| ABC1F50+ | 49 | 53 | 55 | 54 | 50 | 53 | 43 |
| C2DEF50- | 51 | 47 | 45 | 46 | 50 | 47 | 57 |
| Region | | | | | | | |
| Dublin | 29 | 33 | 29 | 32 | 39 | 31 | 23 |
| Ex. Dublin | 71 | 67 | 71 | 68 | 61 | 69 | 77 |
| RoL | 27 | 23 | 27 | 21 | 20 | 28 | 31 |
| Munster | 27 | 28 | 28 | 25 | 30 | 27 | 25 |
| Conn/Uls | 18 | 16 | 15 | 22 | 11 | 14 | 21 |
| Area | | | | | | | |
| Urban | 66 | 73 | 74 | 70 | 73 | 68 | 56 |
| Rural | 34 | 27 | 26 | 30 | 27 | 32 | 44 |



Even beyond attendance, Aficionados are the driving consumer force in the arts

Aficionados are also more likely to:



Be arts participants

57% of Aficionados versus 34% Nationally



Read all types of literature

incl. Fiction 76% vs 67% Nationally, and Poetry 27% vs 15% Nationally



Support the arts (donations, volunteering etc.)

51% vs 25% Nationally



Consume any digital arts/ drama

70% vs 32% Nationally



And to have the most positive general attitudes towards the arts

‘strongly agree’ average 44% vs 24% Nationally

Q.15 In the past 12 months, have you taken part in any of the following activities? By ‘take part’ I mean in your free time in the home, in classes, rehearsals, shows or in workshops — other than as part of your job or in full time education. Think of the past 12 months in full, including before and after the Covid 19 crisis.

Q.19 Which, if any, of the following have you personally done in the past 12 months?

Q.20a Now thinking of reading for pleasure, have you read any of the following in the past 12 months?

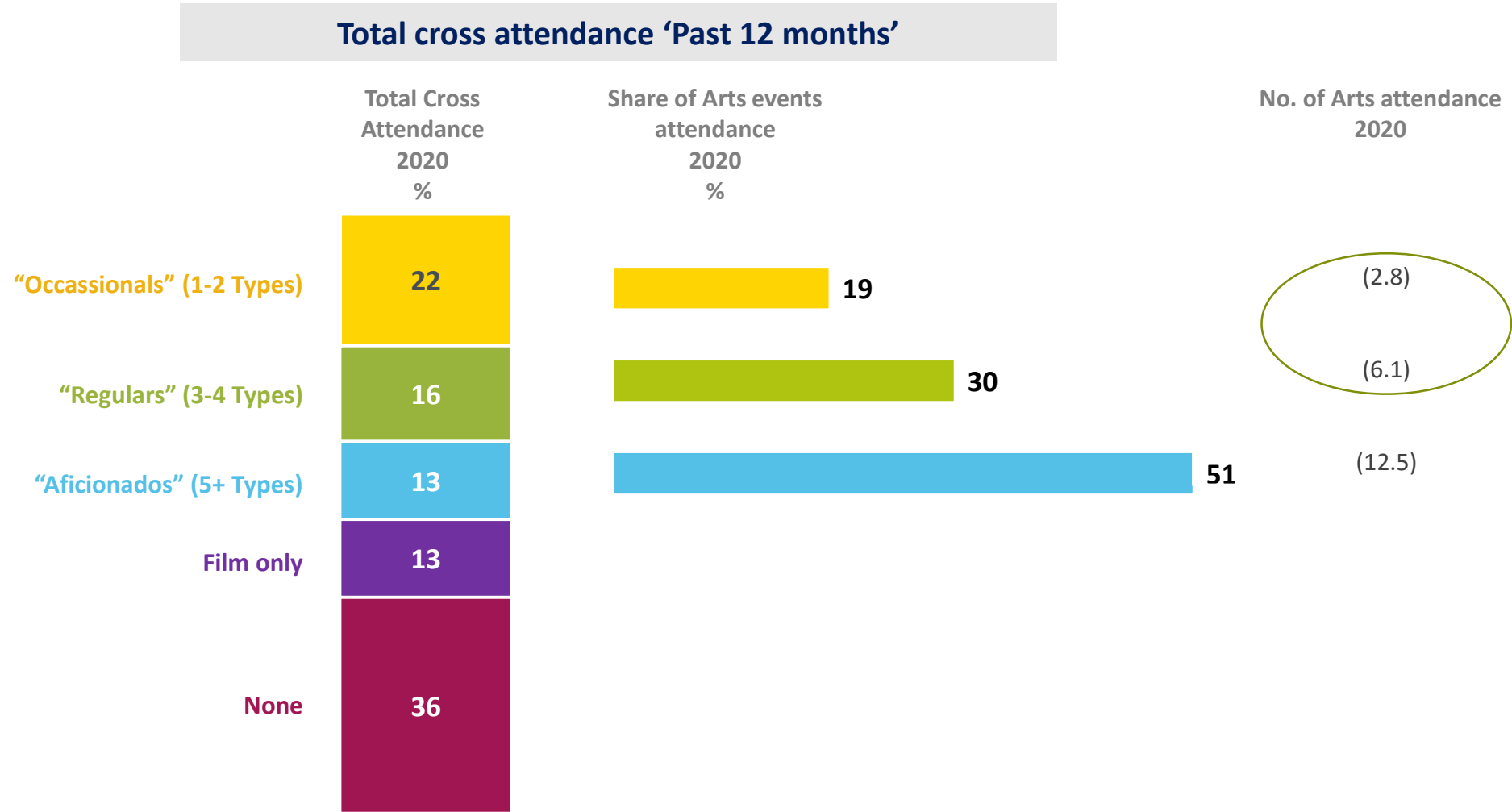
Q.24a Which of these have you done at home or while you’re travelling/ on the go in the past 12 months?

Q.30 How much do you agree or disagree with each of the following statements:

'Regulars' within the Arts Sector are not to be underestimated however



Base : All Adults aged 16+ n- 1,262



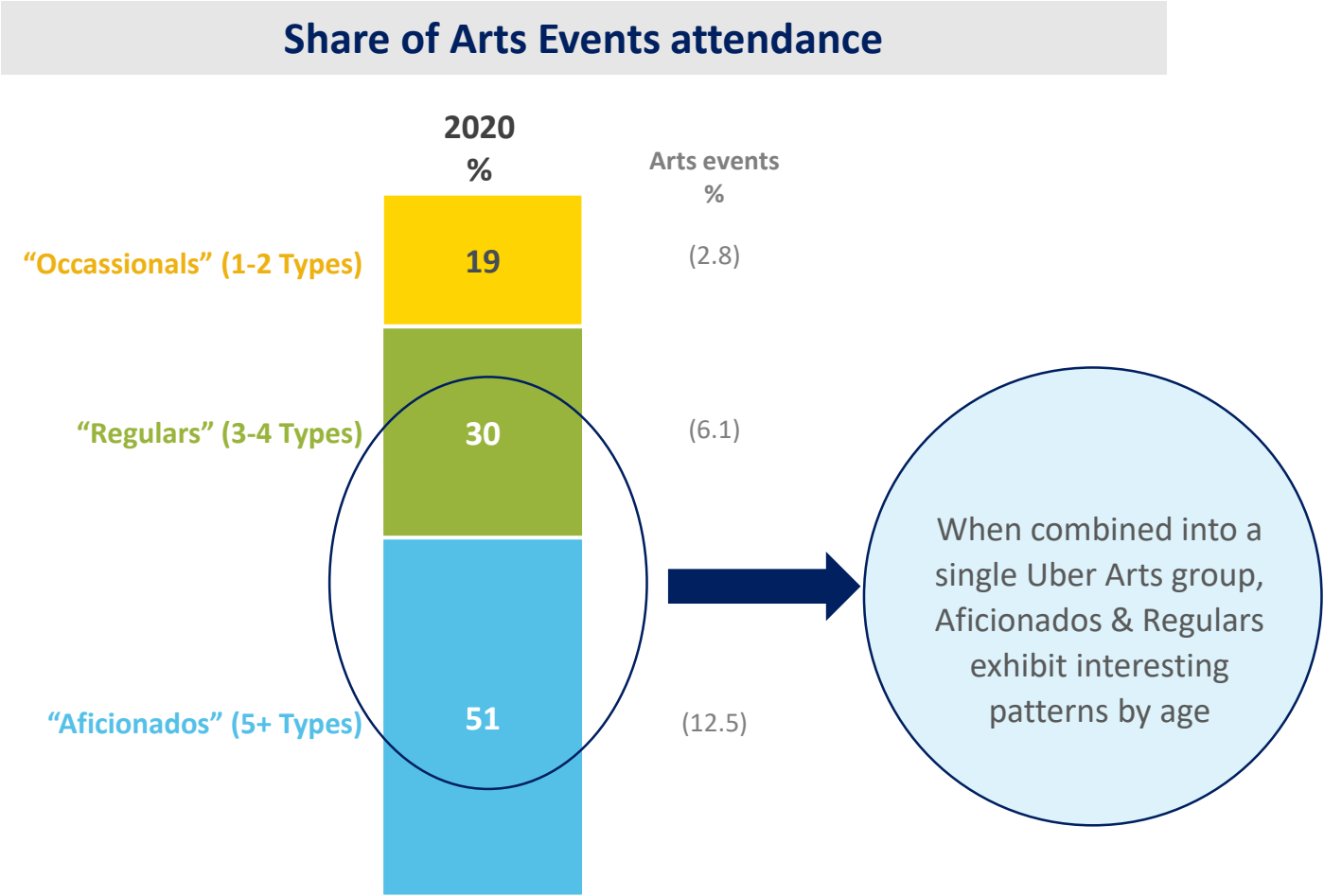
They account for 16% of all adults; and 30% of all arts attendances. They attend on average twice as many arts events as 'Occasionals' – 6.1 vs 2.8 times per annum.

Q.2 In the past 12 months, have you been to any of these events?
Q.4 Which of the following best describes how often you have attended (INSERT FROM Q.2) in the past 12 months? Think of the past 12 months in full, including before and after the Covid 19 crisis.

Aficionados & Regulars - an Uber Arts Group

















Base : All Adults aged 16+ n- 1,262

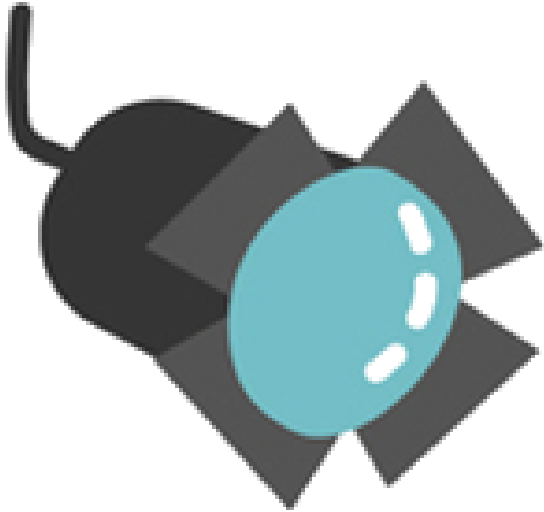


Age differences within Aficionados & Regulars



| |  -35 Years (30%) |  35-49 Years (30%) |  50 years+ (40%) |
|---|--|--|--|
| Those 50 years+ are easily the most likely to want to attend Arts Council funded events more often (95% vs 66% nationally) | | |  |
| 35-49-year olds over index in wanting to see more Stand Up Comedy | |  | |
| Those under 35 years over index in wanting to see more Rock or Popular music; and more Plays |  | | |
| The youngest and oldest of this Uber Arts group are the most likely to have paid to view online arts |  | |  |
| Those 50 years+ are much more satisfied with the quality of the arts & cultural programme they have experienced Online since the start of the crisis. (7.6/10 vs 6.9) | | |  |
| The oldest group are also much more likely to be both aware and to have attended Culture Night | | |  |
| General attitudes towards the arts are equally positive across the three age groups: |  |  |  |
| The biggest distinction relates to the relative quality of Irish arts: the older age group are far more likely to agree that... <i>The quality of professional arts presented in Ireland are on a par with those you would experience in any European country</i> | | |  |



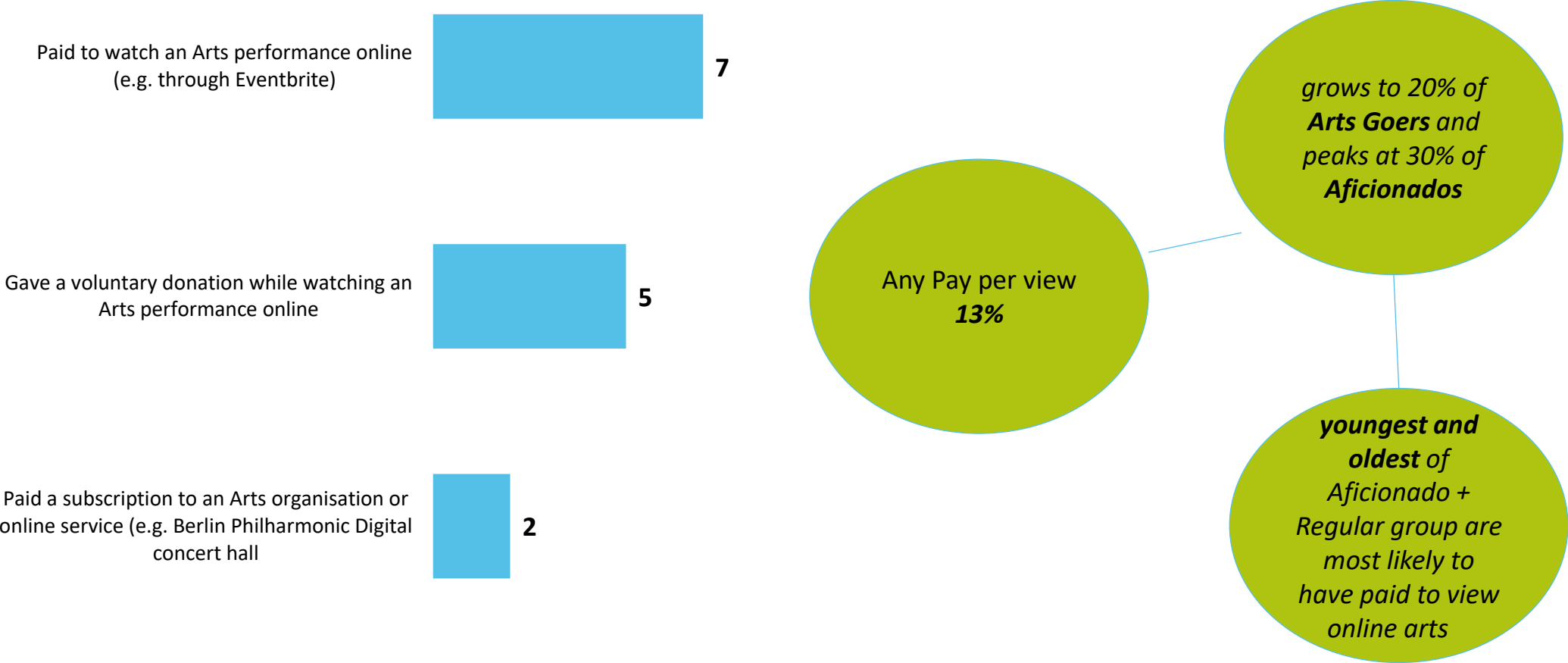


Who is the key target for paid online events?

In the past year, 13% of Irish adults have paid to view online arts performances



Base : All adults 16+ n-1,262

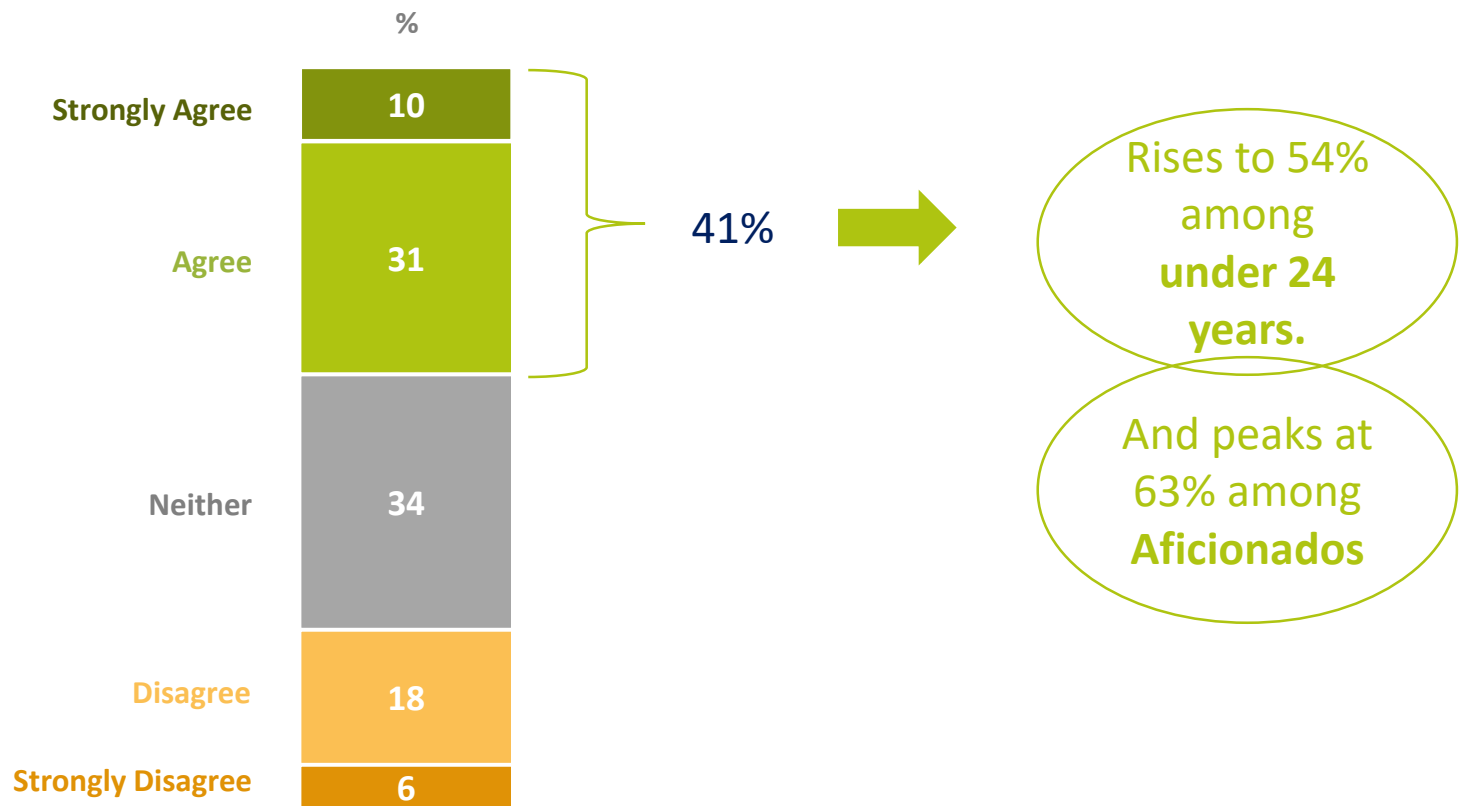


Are we as a nation happy to pay to watch The Arts online?



Base : All Adults aged 16+ n- 1,262

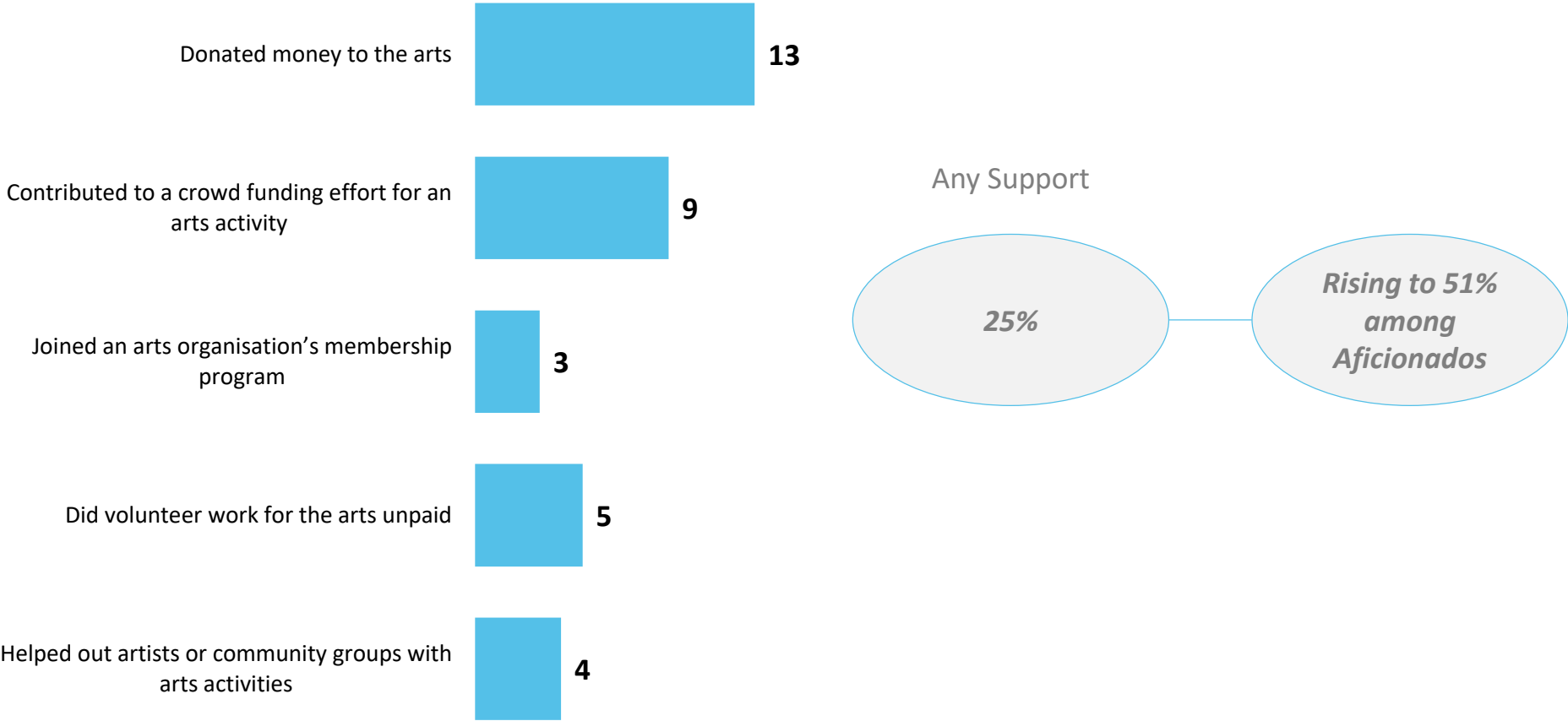
“I am happy to pay to watch professional arts events online”

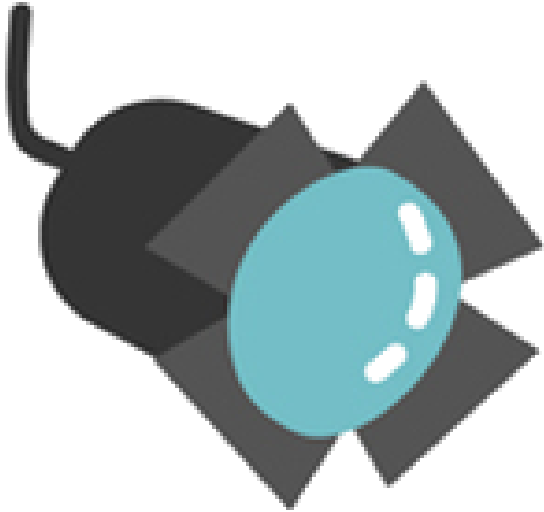


25% of Irish adults generally support the arts (donations, volunteering etc.)



Base : All adults 16+ n-1,262





*The indications are the key target market for paid
online arts events exactly mirrors that of in person
live events – Aficionados
(but don't forget young Regulars)*



Attitudes to the Arts

Arts Insight 2020

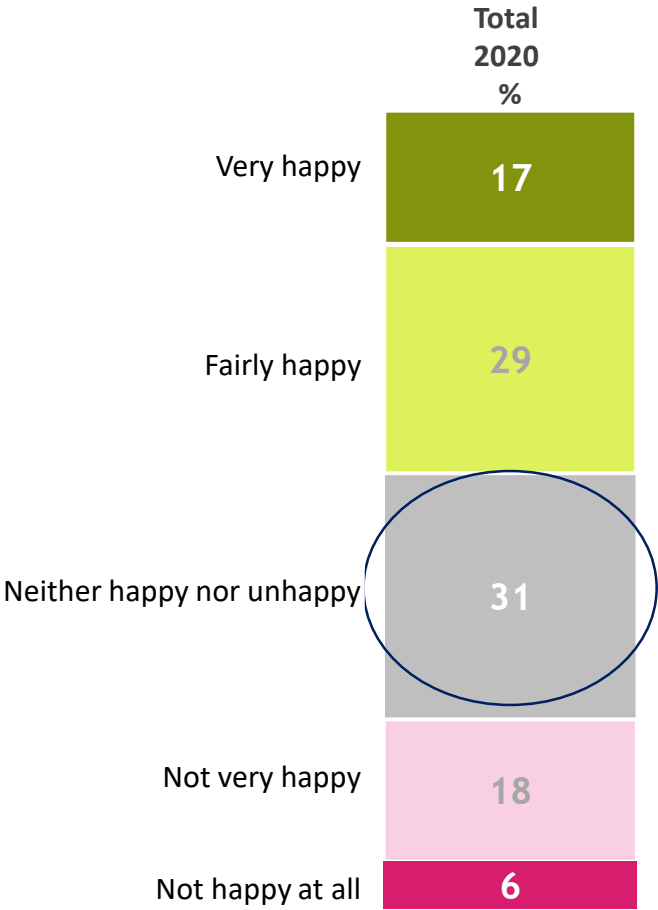
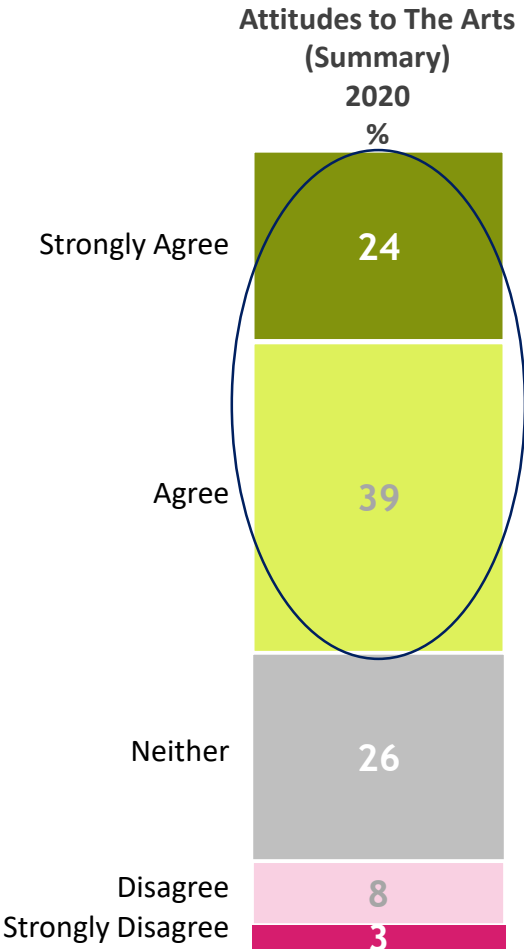
While National Support for the Arts is well evident, is it ‘soft support’?



Base : All adults 16+ n-1,262

General attitudes indicate a considered rather than strong positivity towards the arts

c. 1 in 3 adults are neither happy nor unhappy with their level of attendance at Arts Events in the past 12 months



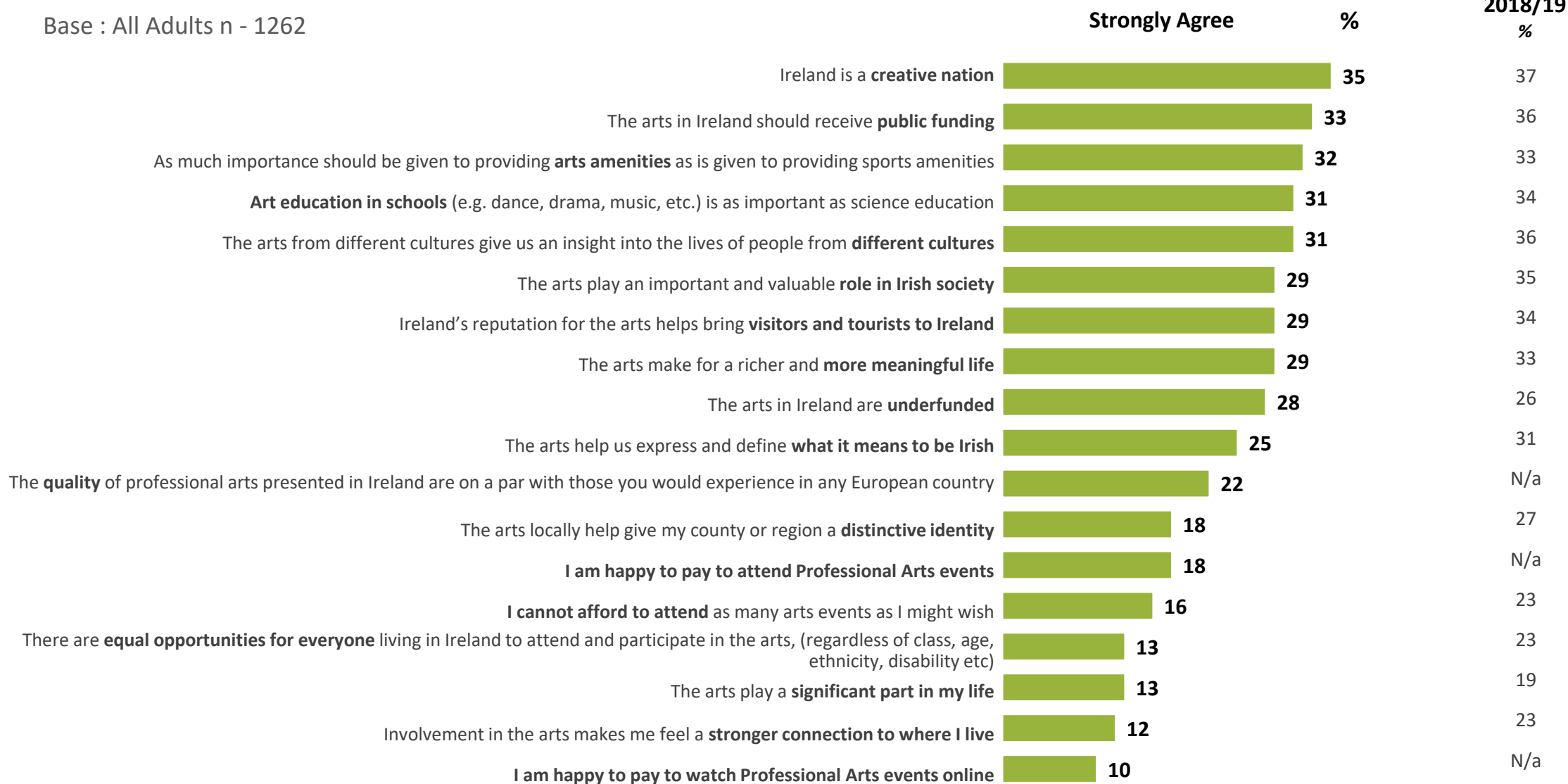
Overall, national attitudes may suggest a somewhat gentle affinity to the role and importance of the arts in our lives

Attitudinal support declines in 2020

Base : All Adults n - 1262



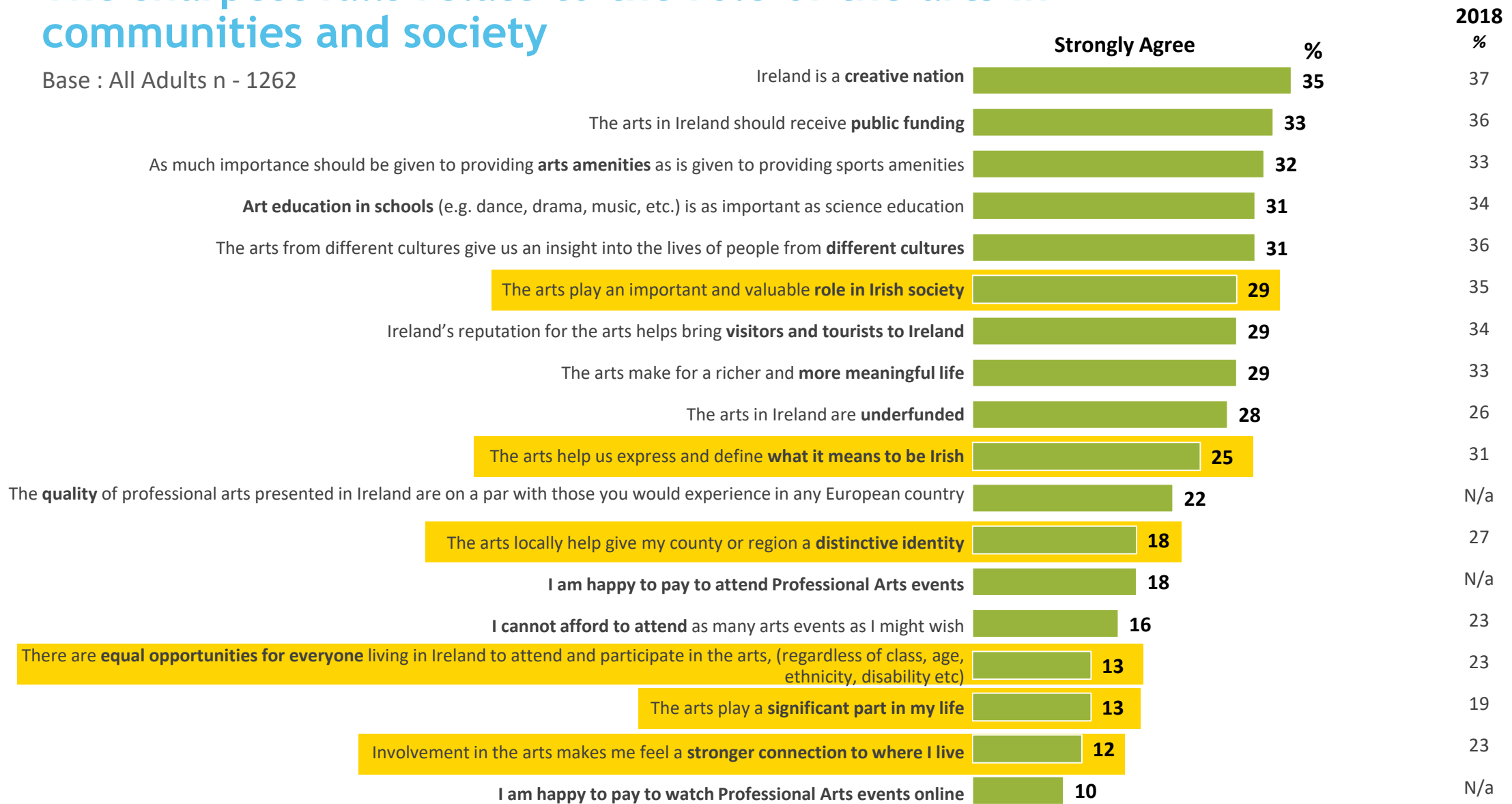
2018/19
%



In this exceptional year, positive attitudes towards the arts have declined: from a 'strongly agree' average of 31% previously to 24% in 2020. This weaker attitude shows a strong consistency across all demographic groups

The sharpest falls relate to the role of the arts in communities and society

Base : All Adults n - 1262



This may reflect the very absence of the arts from our 'out of home' lives in the past 9 months.

Mental Wellbeing Scale (MWS)

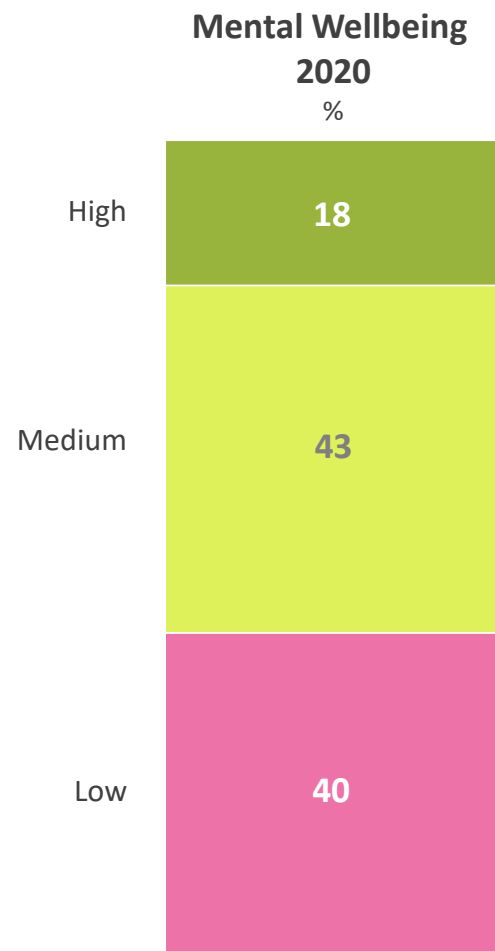
- The WEMWBS, developed by Warwick and Edinburgh Universities, uses a set of 14 positively worded statements about specific thoughts and feelings, with five response categories to determine how often an individual has experienced them; this is used to assess mental wellbeing. A shortened version of the tool, called SWEMWBS³, with 7 items, was used in the survey, to allow for analysis of any difference in response patterns according to mental wellbeing. Each of the 7 items carried a score between 1 and 7, giving individual participants an overall score between 7 and 35, with a lower score denoting a lower level of mental wellbeing. For the purpose of analysis in this report the level of mental wellbeing has been assessed as either low, medium or high.

| Questions | Score | | | | |
|--|------------------|--------|------------------|-------|-----------------|
| | None of the time | Rarely | Some of the time | Often | All of the time |
| I've been feeling optimistic about the future | 1 =1 | 2=2 | 3=3 | 4=4 | 5=5 |
| I've been feeling useful | 1 | 2 | 3 | 4 | 5 |
| I've been feeling relaxed | 1 | 2 | 3 | 4 | 5 |
| I've been dealing with problems well | 1 | 2 | 3 | 4 | 5 |
| I've been thinking clearly | 1 | 2 | 3 | 4 | 5 |
| I've been feeling close to other people | 1 | 2 | 3 | 4 | 5 |
| I've been able to make up my own mind about things | 1 | 2 | 3 | 4 | 5 |

³ Stewart-Brown, S. Tennant, A. Tennent, R. Platt, S., Parkinson, J. and Weich, S. (2009) Internal construct validity of the Warwick-Edinburgh Mental Well-being Scale (WEMWBS): a Rasch analysis using data from the Scottish Health Education Population Survey. Health and Quality of Life Outcome. 7:15 doi:10.1186/1477-7525-7-15

In this broader measure, the Mental Wellbeing Scale (MWS) indicates that 40% of Irish adults are currently classified in the 'Low' group

Base: Adults aged 16+ n – 1,262



Mental Wellbeing Issues are most closely associated with age - the 'Low' group rising to 50% of those aged under 35 years

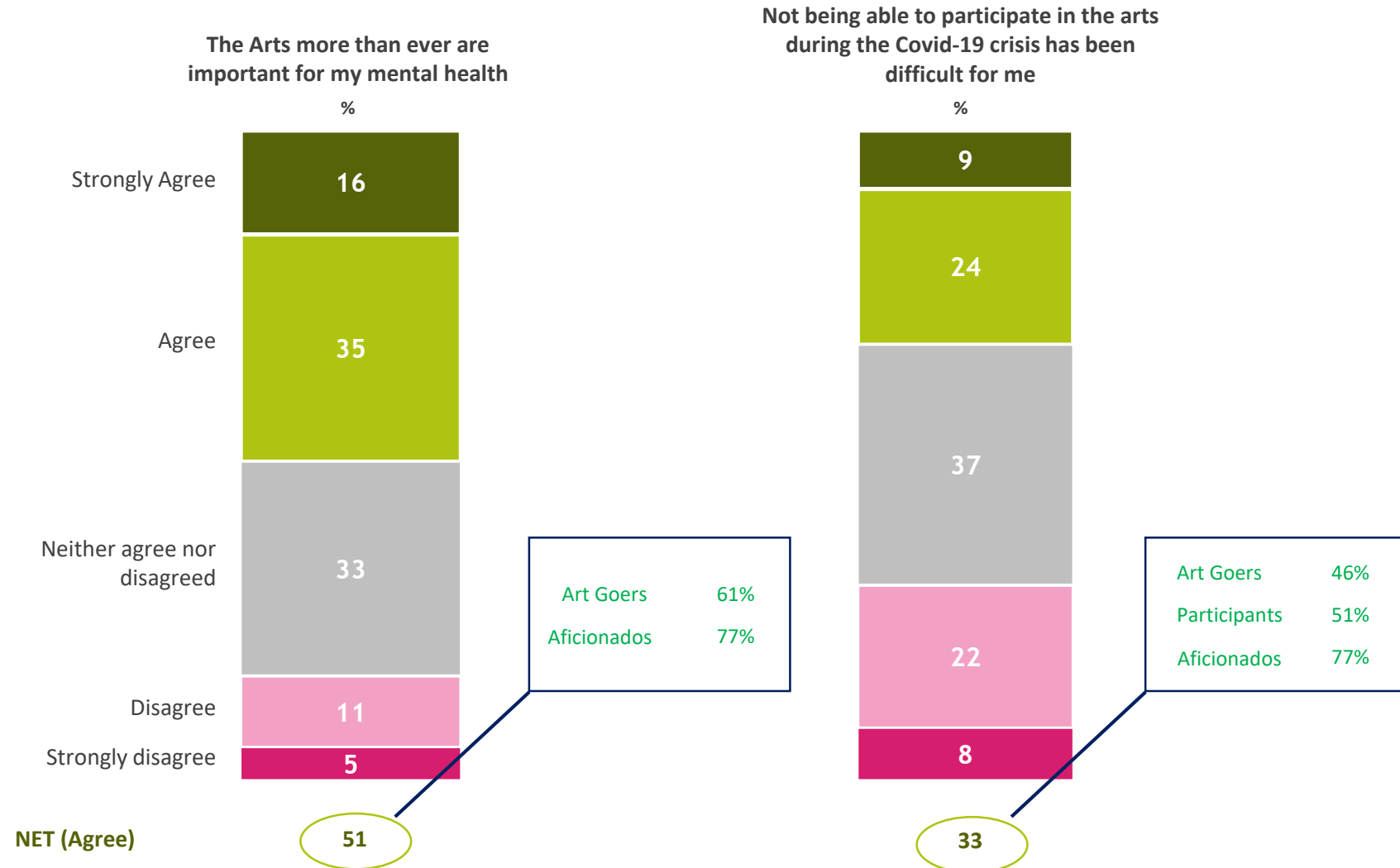
Base: Adults aged 16+ n – 1,262

| (MWS) | Total | Age | | | Arts Goers | | | | | | Participation | |
|--------|-------|-----|-------|-----|----------------|------------|---------|-------------|---|------|---------------|------------------|
| | | >34 | 35-49 | 50+ | Any arts goers | Occasional | Regular | Aficionados | Films at a cinema or other venue (ONLY) | None | Participants | Non-Participants |
| | 1262 | 364 | 402 | 496 | 671 | 282 | 213 | 176 | 174 | 417 | 450 | 812 |
| | % | % | % | % | % | % | % | % | % | % | % | % |
| Low | 40 | 50 | 44 | 29 | 39 | 36 | 43 | 39 | 39 | 41 | 38 | 40 |
| Medium | 43 | 38 | 42 | 47 | 44 | 46 | 42 | 43 | 45 | 40 | 42 | 43 |
| High | 18 | 13 | 14 | 24 | 17 | 17 | 15 | 18 | 17 | 20 | 20 | 17 |

The unsettling incidence of the 'low' group does not peak further among Arts Goers

The Arts + COVID 19: Attitudes

Base : All Adults n - 1262



61% of Arts Goers agree that The Arts more than ever are important for my mental health; and 46% agree that Not being able to participate in the arts during the Covid 19 crisis has been difficult for me



Summary and Conclusions

Arts Insight 2020

1.

The survey results confirm the severe impact of the global pandemic on the Irish Arts Sector.

2.

Irish adults have tried to compensate for the absence of live events through consuming arts online as well as an increase in on demand media use generally; there has also been a rise in reading, especially fiction.

3.

Participation levels in the arts have actually increased in 2020, facilitated through switching to online and blended forms of participation; and motivated by the enjoyment, self-expression and wellbeing derived from engaging in the arts.



4.

However, our adapted forms of consumption and participation have only compensated in part – satisfaction with the online arts offering to date is modest and we clearly very much miss live in person engagement.

5.

The sector faces the twin challenges and opportunities of offering quality online alternatives while preparing for an audience highly motivated to return to the 'real thing'.

6.

Irrespective of the form of engagement, Aficionados remain the cornerstone of public support for the arts and present the core target for paid online offerings. Notwithstanding this, 'Regulars', especially those under 35 years, present a further important target.

7.

The national mood can be characterised as 'depressed' with concerning indications of mental wellbeing generally and especially among younger adults. Overall, positive attitudes towards the arts have declined, with the sharpest falls relating to their role in communities and society; likely of course reflecting the very absence of the arts from our 'out of home' lives in the past 9 months of this horrid year.

Thank you.



RESEARCH
& INSIGHT

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Delve Deeper