

CULTURE + COMMUNITY IN A TIME OF TRANSFORMATION

A SPECIAL EDITION OF
CULTURE
TRACK[®]

LaPlaca
Cohen

sloverlinett
AUDIENCE RESEARCH

Yancey Consulting
Moving Beyond Sustainability (SM)

Key Findings From Wave 2 | November 23, 2021

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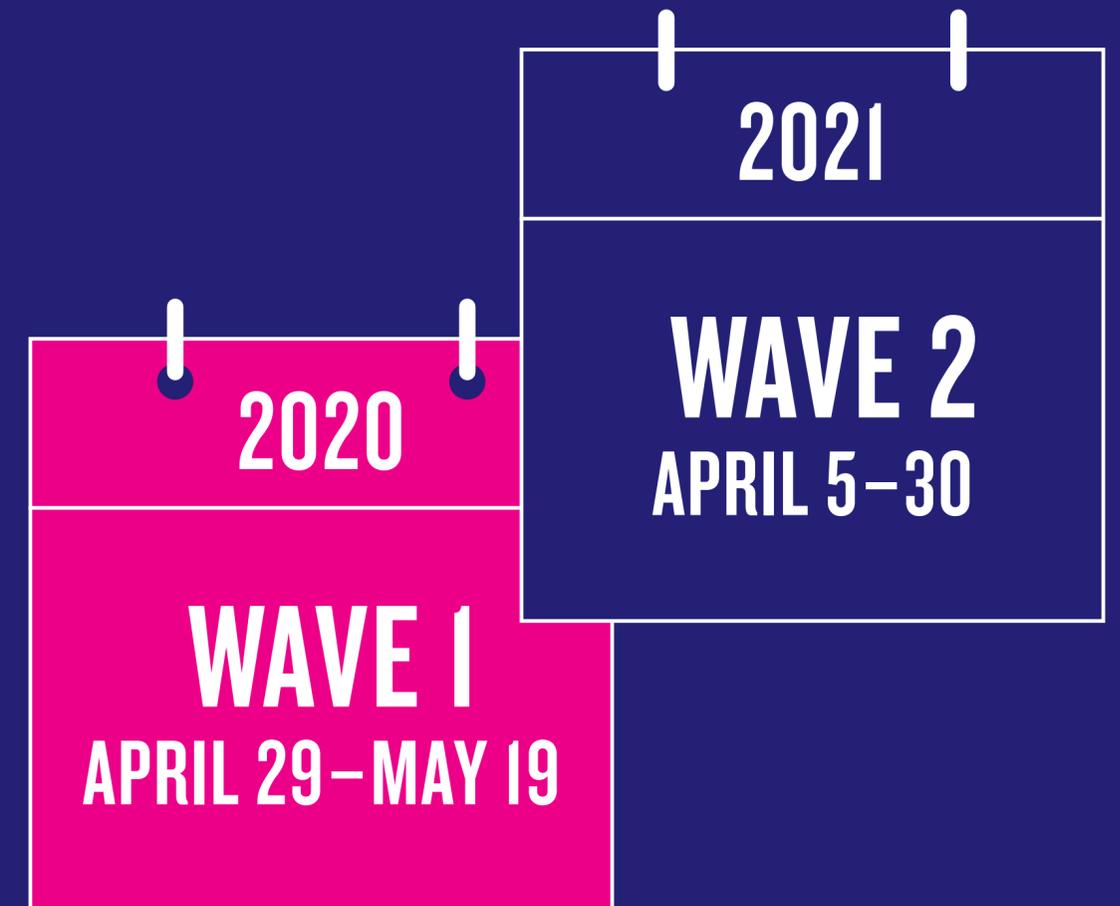
A Note from the Authors

Culture Track is a national online survey of audience behaviors, attitudes, motivations, and barriers to cultural participation, which has been conducted by LaPlaca Cohen since 2001.

Culture & Community in a Time of Transformation: A Special Edition of Culture Track is a collaboration between LaPlaca Cohen and Slover Linett Audience Research, graciously supported by our generous funders, partners, and collaborators listed on p. 32. The study, which began in 2020 with a first wave of research and insights, aims to connect the cultural sector with the experiences and needs of its communities and audiences during the pandemic and beyond.

This report offers key findings from the second wave of this national survey, fielded from April 5 to April 30, 2021. The first wave survey, *Culture + Community in a Time of Crisis*, was fielded from April 29 to May 19, 2020.

A report that dives deeper into the data set will be released by Slover Linett Audience Research in the winter of 2022.



This report includes U.S. data only.

Our Approach

To reflect the diverse experiences of all Americans, we:

- Worked with the NORC AmeriSpeak panel to survey a core sample that is representative of the U.S. general population.*
- Included a strategic oversampling in the NORC sample of underrepresented voices from Wave 1 by race, ethnicity, and education levels to ensure large enough sample sizes for these populations.
- Invited cultural organizations from across the country to send the survey to their email lists, giving us a more robust sample.

These samples were then combined and weighted to provide an estimate of the U.S. population as a whole, not just those actively participating in arts and culture activities.

Equitable-research firm Yancey Consulting played an advisory role in the formulation of updated

research questions, the design of the survey instrument, the sampling plan, and the interpretation of the data. We also made the survey available in ten languages.

In our report, we make comparisons to data we collected in the first wave of this study. In both the NORC AmeriSpeak panel sample and the sample from participating organizations, different individuals responded to each wave of the survey. Any comparisons over time we report are aggregate changes, and differences in responses that are not statistically significant may be a result of differences in the samples, not a result of changes in attitudes.

A note on language: we use the acronym “BIPOC” to refer to Asian, Pacific Islander, Black, African American, Hispanic, Latinx, and Native American groups throughout the report. The authors acknowledge that “BIPOC” and these terms can obscure the many important differences within and between these groups.

For more information on weighting and methodology, please visit www.culturetrack.com

78K Total Respondents

3,600

Sample from
NORC’s AmeriSpeak panel



74K

Sample from mailing lists of
532 Participating Arts and Culture Organizations

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

Participating Organizations

We re-invited all organizations from Wave 1 to participate again in distributing the survey. We also actively invited new organizations from categories that were underrepresented in our Wave 1 work including BIPOC-serving organizations, cultural organizations located in rural parts of the country, festivals, libraries, for-profit music venues, and parks. Despite these efforts, respondents from these samples were still generally whiter, wealthier, and more urban than the nation at large.

Note: The number of organizations of a specific type does not represent a direct correlation to the distribution of respondents.

532 Cultural Organizations



*Includes human services, economic development, disaster relief, and community art centers.

**Includes heritage tours and sites, traditional and folk art, and media arts.

35%
of orgs are new to the study

13%
or **68 Organizations** identified themselves as primarily serving a BIPOC community

31%
of orgs have fewer than 10 employees

60%
of orgs have fewer than 50 employees

Operating Budgets

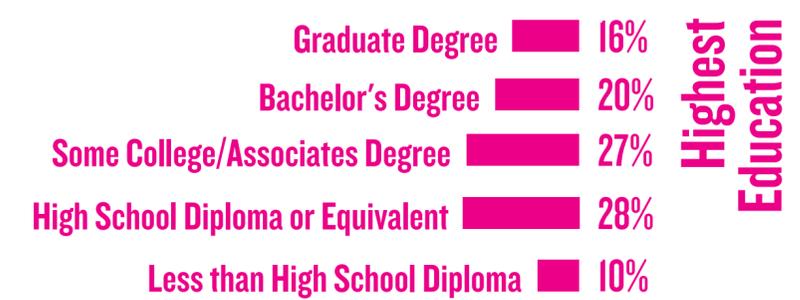
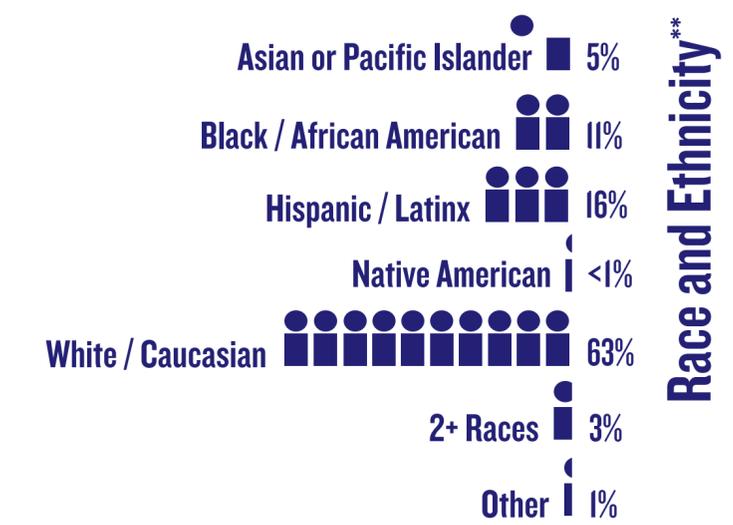
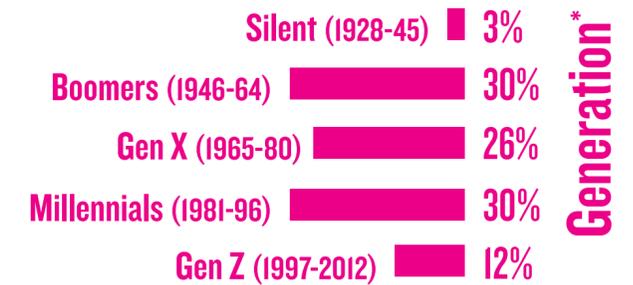
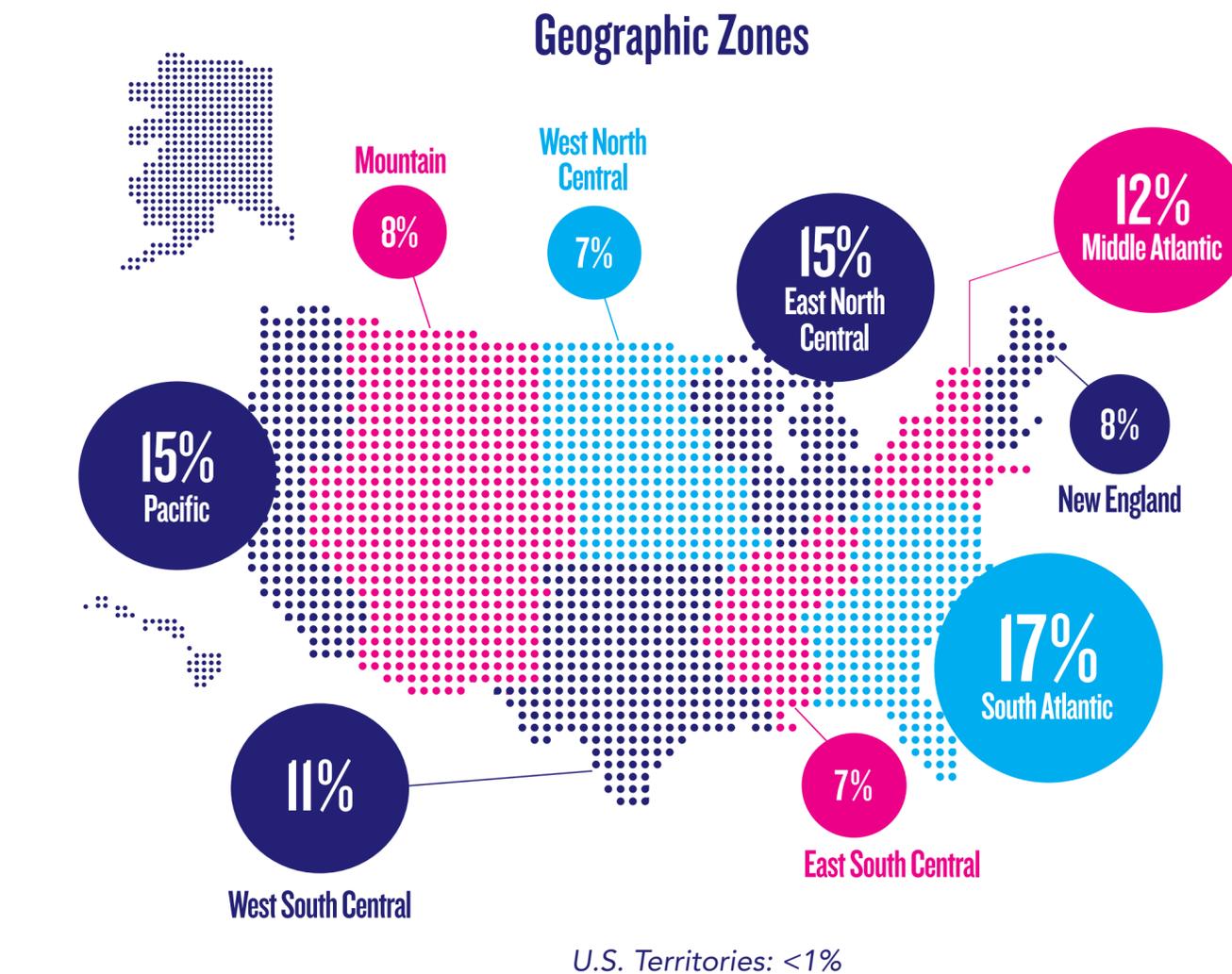
Less than \$1 Million (M)	22%
\$1M–\$2.49M	19%
\$2.5M–\$4.9M	15%
\$5M–\$9.9M	11%
\$10M–\$20M	11%
Over \$20M	19%

A National Portrait

To balance the general population and organization list respondents for analysis and comparison, we oversampled underrepresented groups using the NORC AmeriSpeak sample. We statistically weighted the data to reflect the demographics and the behaviors of the U.S. population and its subgroups.

The numbers on this page and in the rest of the report reflect this combined and weighted sample, providing a representative national picture.

Figures throughout the report are rounded to the nearest tenth of a percent. Charts depicting single select questions may not equal 100% due to rounding. For more details on weighting and methodology, please visit www.culturetrack.com



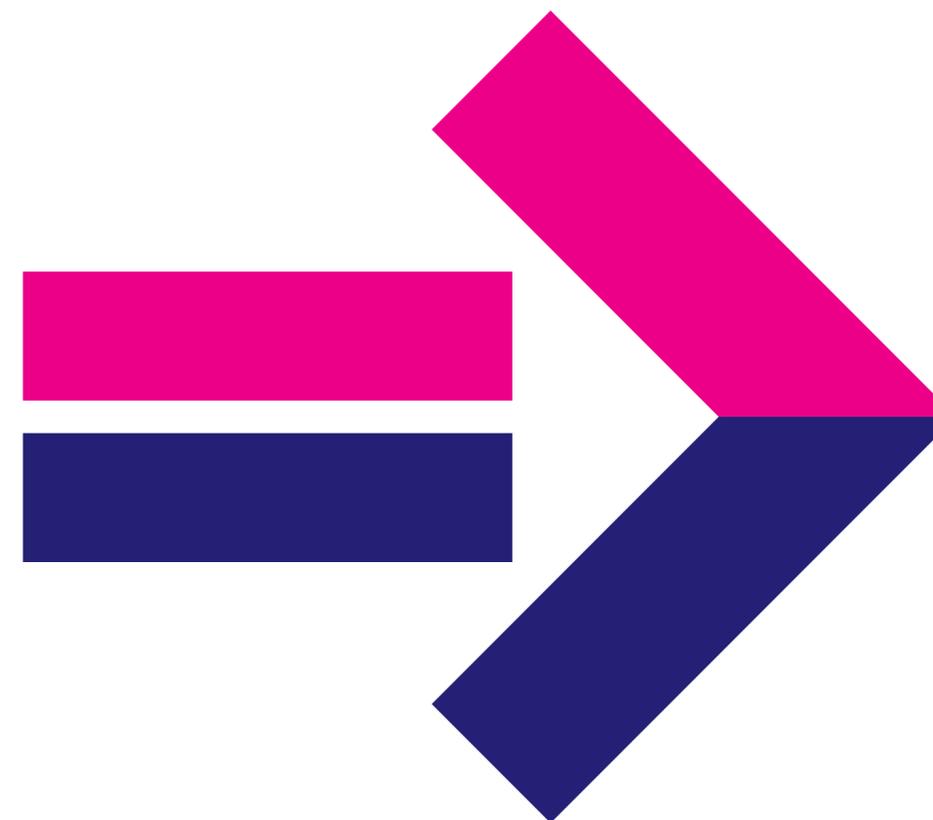
*All respondents are 18+. **Hispanic/Latinx includes all with Hispanic ethnicity regardless of race. All other groups are non-Hispanic. Due to the small sample size of the Native American group, we may be capturing less of the nuance that exists within this population. *** Were members, subscribers, volunteers, artists, or employees of cultural organizations.

Our goal is to support the evolution of the arts and culture sector toward long-lasting impact and equity.

We have been living with the COVID-19 pandemic longer than many imagined, and we continue to adapt and change in response to our evolving pandemic reality. We are not the same people we were before the pandemic swept across the U.S., but we are also not the same people we were in Wave 1.

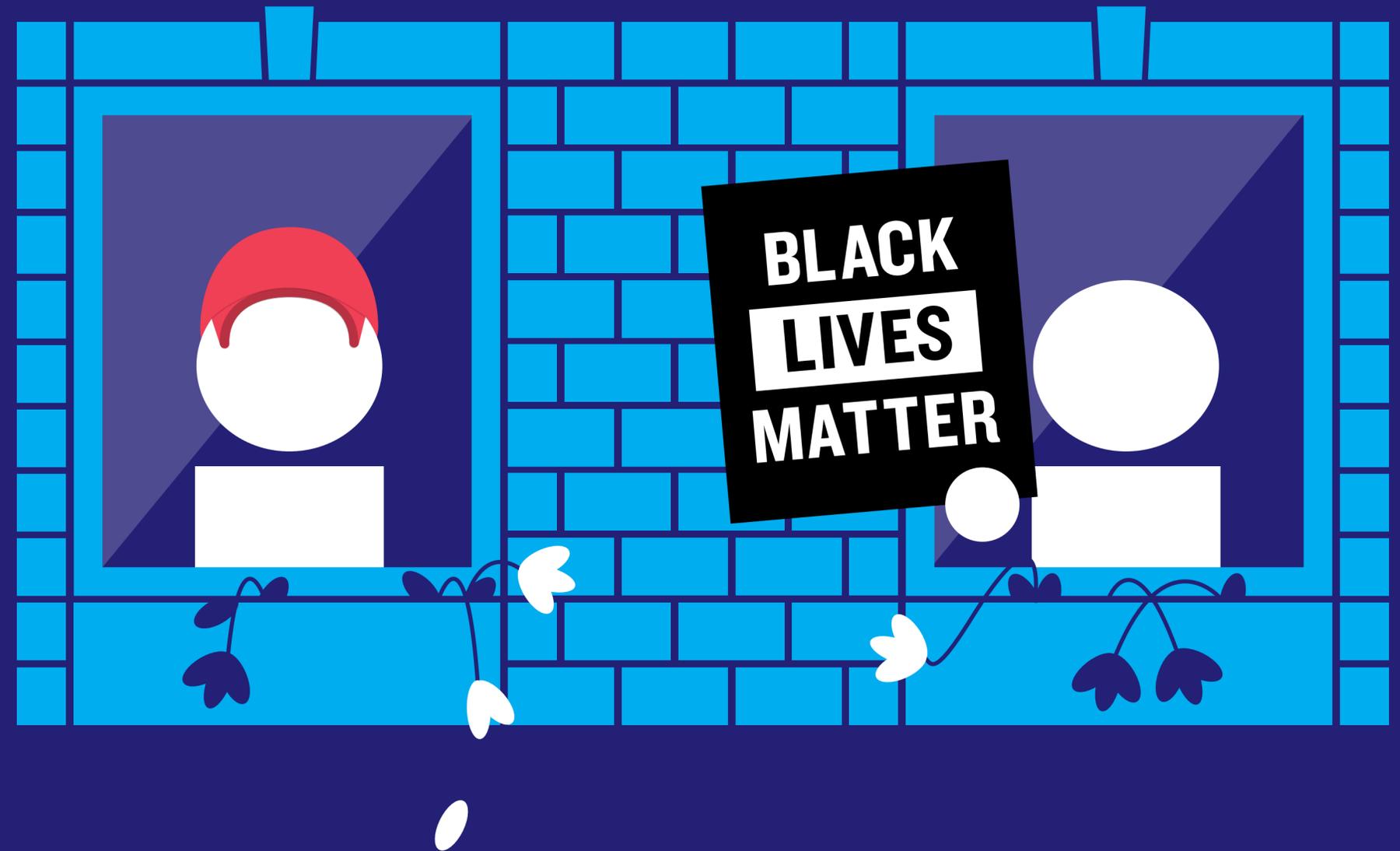
The past year has been marked by continued social isolation, political and social divide, economic uncertainty, environmental crises, and racial reckoning. During this time, the collective discourse has more strongly acknowledged the ways that racism has shaped the world around us—the cultural sector included.

Therefore, along with examining overall pandemic-era shifts, this second wave of our study also seeks to highlight the experiences of Black, Indigenous, and People of Color (BIPOC) populations. It is our hope that this study will help chart a path forward in the reconstruction of the cultural sector and will be part of a long lineage of continued investment in BIPOC perspectives in the arts.



How Are We, Really?

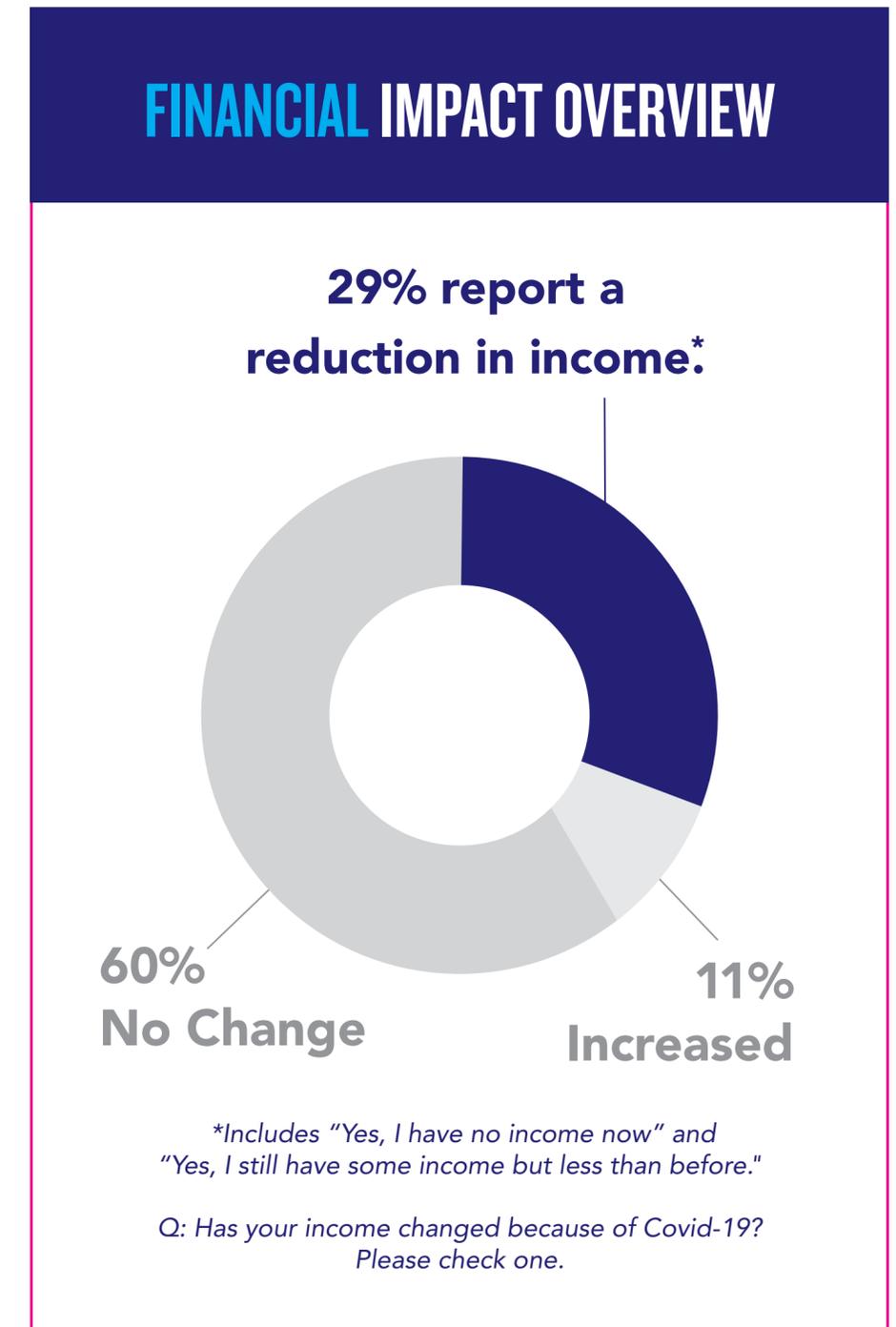
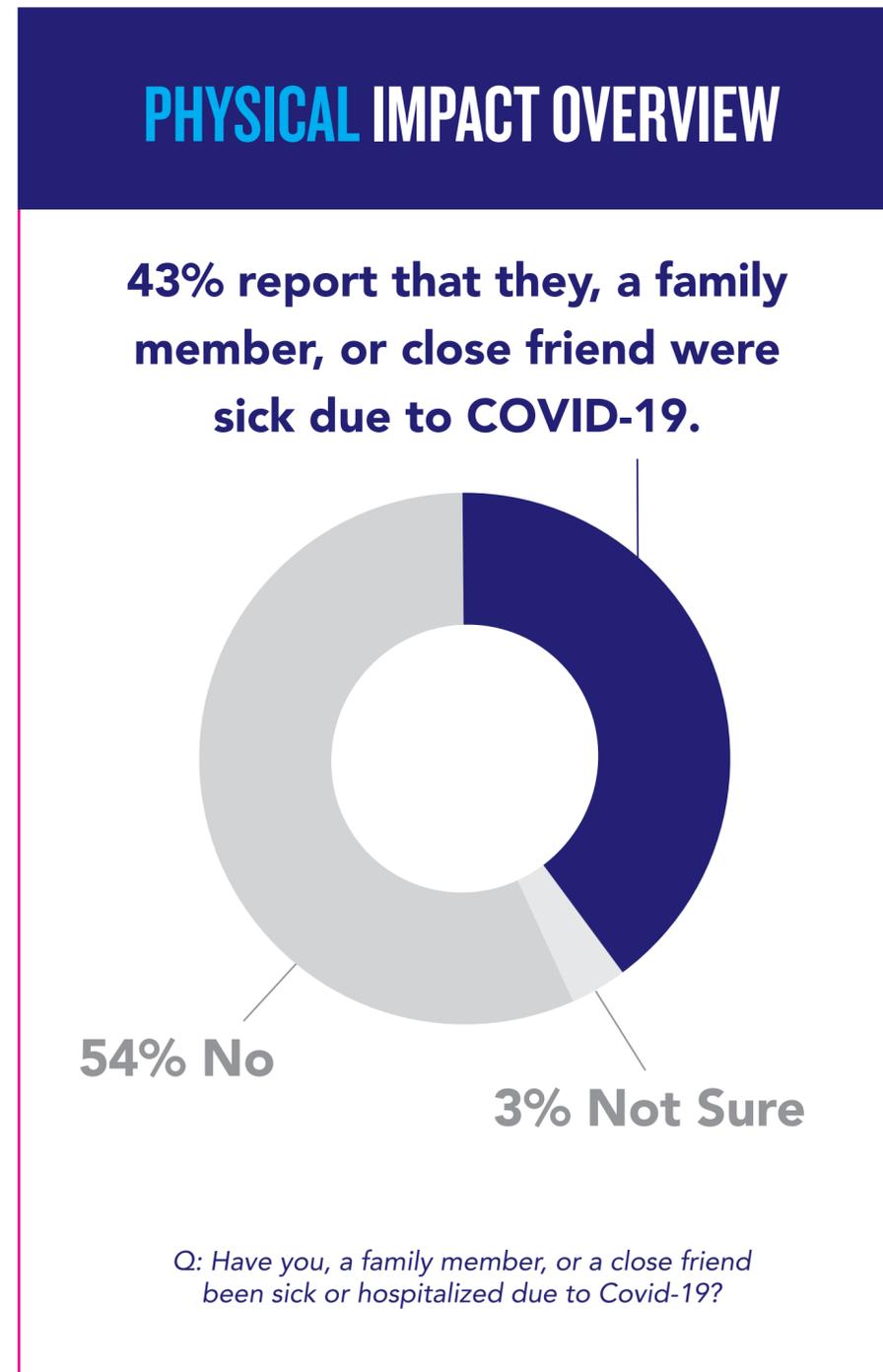
Much has changed since the COVID-19 pandemic upended our lives in March 2020, from the availability of vaccines and economic relief programs to social upheaval and political divides. With ever-changing safety protocols shaping how we conduct our daily lives, our well-being has suffered during this time of prolonged uncertainty.



The Impact at a Glance

In Wave 2 of our study, **3.5x** more respondents reported having **COVID-19** or knowing someone who did, while **3 out of 10** reported a reduction in income.

The survey closed on April 30, 2021.

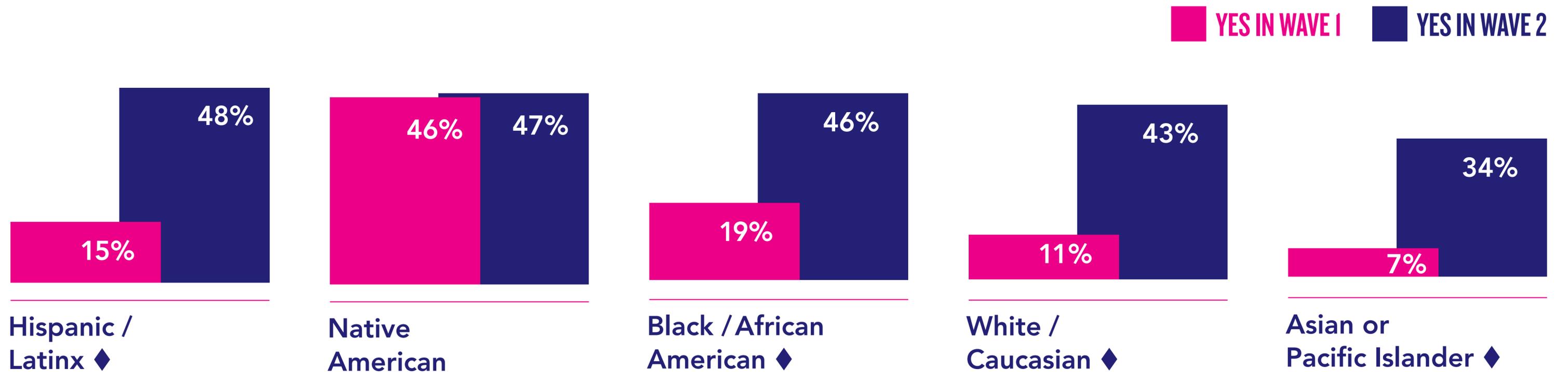


The Physical Impact of COVID-19



Have you, a family member, or a close friend been sick or hospitalized due to COVID-19?

More than one year into the pandemic, the virus has impacted the health of many respondents. The rates of reported illness increased by 2x or more for nearly all racial and ethnic groups since our last report.



Charts are listed in descending order of Wave 2 impact.
♦Difference between waves is statistically significant.

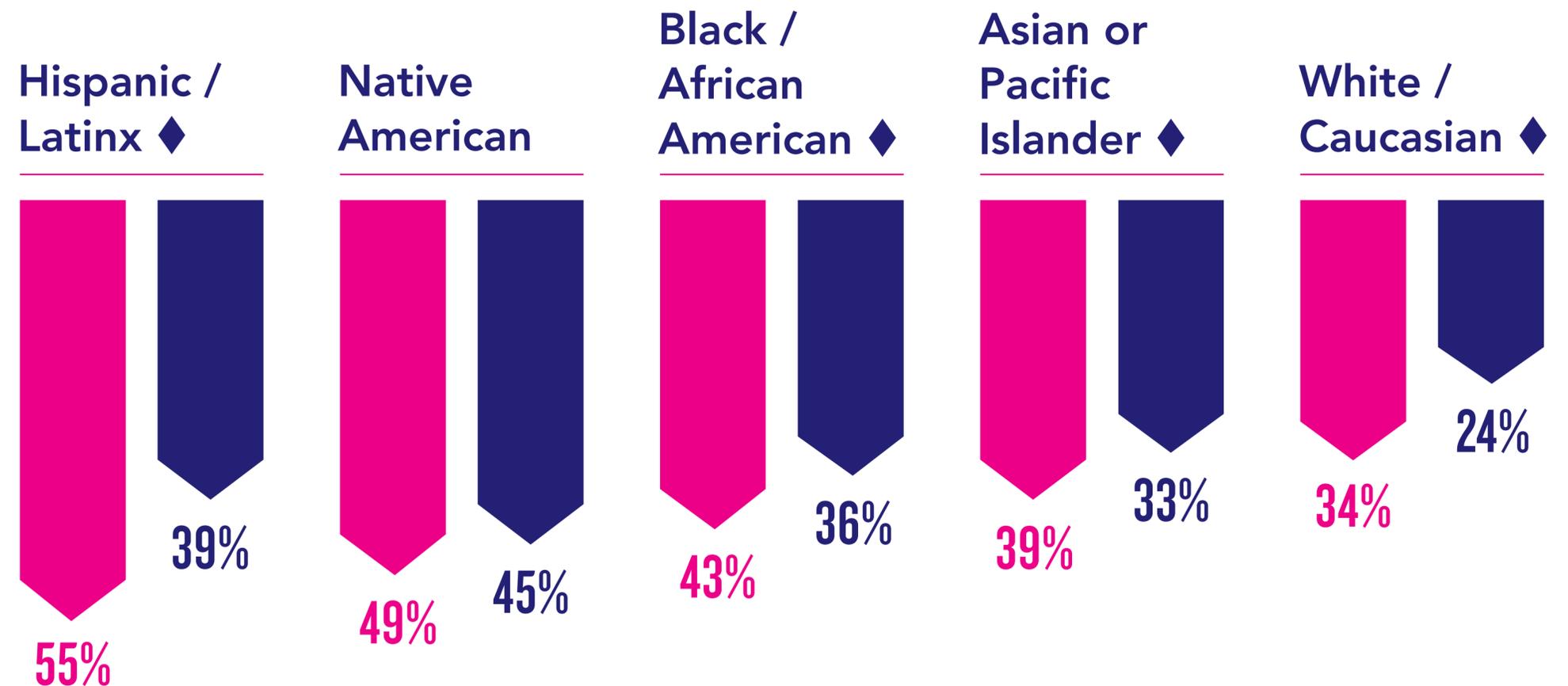
Income Inequality: COVID-19 Edition



Has your income changed because of COVID-19?

While respondents regained some lost income since last year's survey, income losses continue to fall harder on BIPOC groups and financial recovery is uneven across race and ethnicity.

■ LOST INCOME IN WAVE 1 ■ LOST INCOME IN WAVE 2



Represents respondents who answered "Yes: I still have some income but less than before" or "Yes: I have no income now." Charts are listed in descending order of Wave 1 impact.
◆ Difference between waves is statistically significant.

The Emotional Toll

Respondents continue to report an emotional state that has worsened since pre-pandemic times, with more people feeling disconnected, sad, or angry.

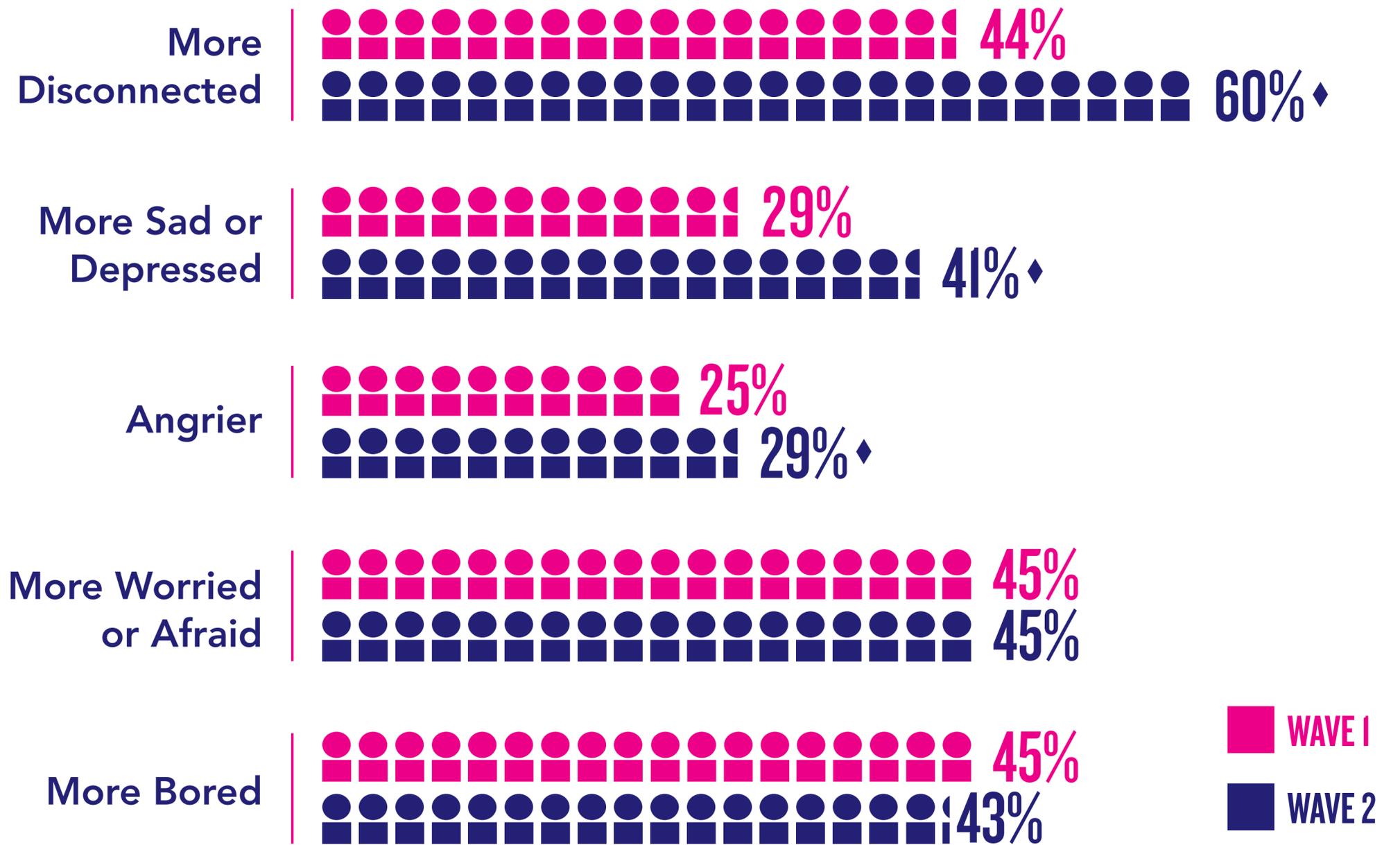
Respondents answered according to a five-point scale ranging from "A lot less" to "A lot more." Top two or bottom two responses are combined. Emotions are listed in descending order of point change from Wave 1 to Wave 2.

◆ Difference between waves is statistically significant.

Q

Compared to your life before the pandemic, how are you feeling these days?

Please select one answer for each feeling.



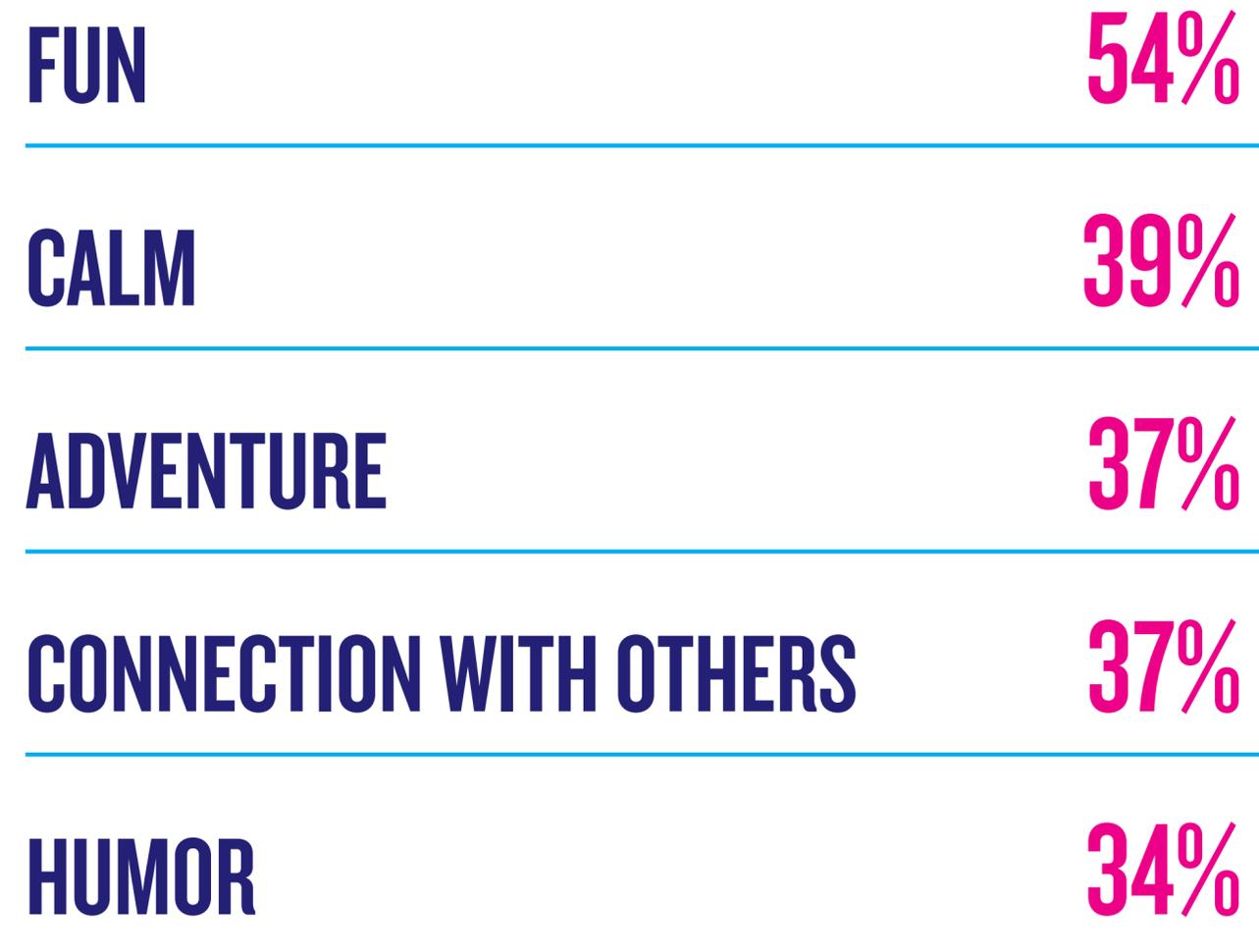
Seeking In Our Daily Lives

Overall, people are seeking more fun in their lives, but they also want more calm, connection, and adventure—needs that align with how respondents are feeling.

Q

What kinds of things do you want more of in your life right now?

Please select up to FIVE.



Respondents could select from 14 options. Only options above 34% are represented. 2% selected none of these.

Our New “Hybrid” Normal

Amidst field-wide closures, the pandemic has ushered in an influx of digital experimentation. This has opened the door for arts organizations to consider new "hybrid" approaches, where digital and physical realms could coexist and enrich cultural experiences. However, varying levels of digital participation present both opportunities and challenges for the cultural sector around issues of accessibility and monetization.



Cultural Engagement 2.0

Although most respondents expect to prefer in-person over online cultural activities, a small portion expects to be digitally agnostic or to favor digital—an audience with potential for cultivation.

Q

When you are able to engage in (or engage in more) in-person arts or culture activities, how do you expect you'll split your time between online and in-person experiences?

EXPECT TO PREFER ONLINE*



17% Will Make Decisions Based on Content

9% Prefer Online and In-Person Activities About Equally

*Includes almost always and usually prefer online.

**Includes almost always and usually prefer in-person.

Activating the Digital Realm

In a pandemic era epitomized by expanded digital possibilities, we identified three elements that can inform the design of compelling online cultural experiences.

Five-point scale. Percent selecting a top-two-box indicating they feel this is "very important."



FREE ACCESS

68% of respondents believe it's important that digital activities are free (no cost to access online).

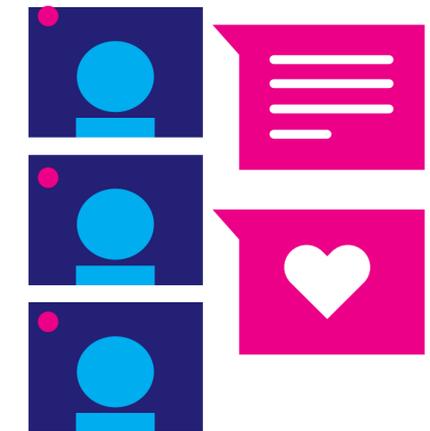
Q

Thinking about the kinds of online arts or culture activities that you've done, how important are the following qualities?



GLOBAL ACCESS

62% of respondents believe it's important that digital activities give access to organizations or artists located in other places.



SOCIAL ACCESS

45% of respondents believe it's important that online activities include a social component to connect with other participants.

What is the Value of Digital vs. In-Person?

“It's a matter of time. Learning from home is better because it doesn't involve travel [...] **Online has greatly improved** and I get a sense of community through my art classes.”

Q: Would you share more about why you prefer doing arts or culture activities online over in-person events?

“For the most part, I would prefer in-person arts and culture events because I enjoy connecting with the community. **However, I am excited about the possibilities of more online or hybrid content** that increases access”

Q: Would you share more about why you prefer in-person arts or culture events over online activities?

“Online activities can make me feel safe, and more importantly, there is **no other discrimination** and criticism.”

“I wish everything was available in a hybrid model of in-person (for those who can) and virtual for those who can't go in-person.”

The Wide World of Content

Those who participate in digital activities continue to access a wide variety of online cultural content a year into the pandemic. Online cultural activities offer people a way to meet some of the social and emotional experiences they are seeking.

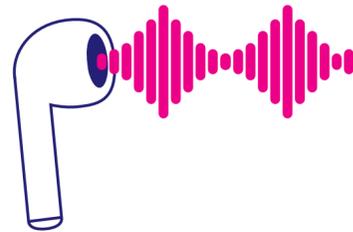
MOST POPULAR ONLINE ACTIVITIES

Q: Have you done any online arts or culture activities or events over the past year? Respondents could select from 12 activities, top five responses shown.



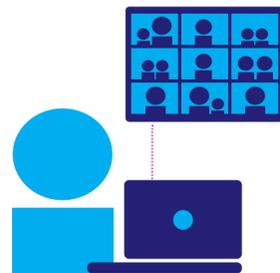
39%

ARTIST
LIVESTREAM



38%

PODCAST



33%

ONLINE CLASSES OR
WORKSHOPS



31%

PRERECORDED
PERFORMANCES
(TIE)

31%

LIVESTREAM
PERFORMANCES
(TIE)

GAINING FROM ONLINE ACTIVITIES

Q: What did you get out of doing online arts or culture activities? Top five responses shown.

49% FUN

47% LEARN SOMETHING NEW

43% RELAXATION

30% CONNECTION
WITH OTHERS

28% BROADEN MY
PERSPECTIVE

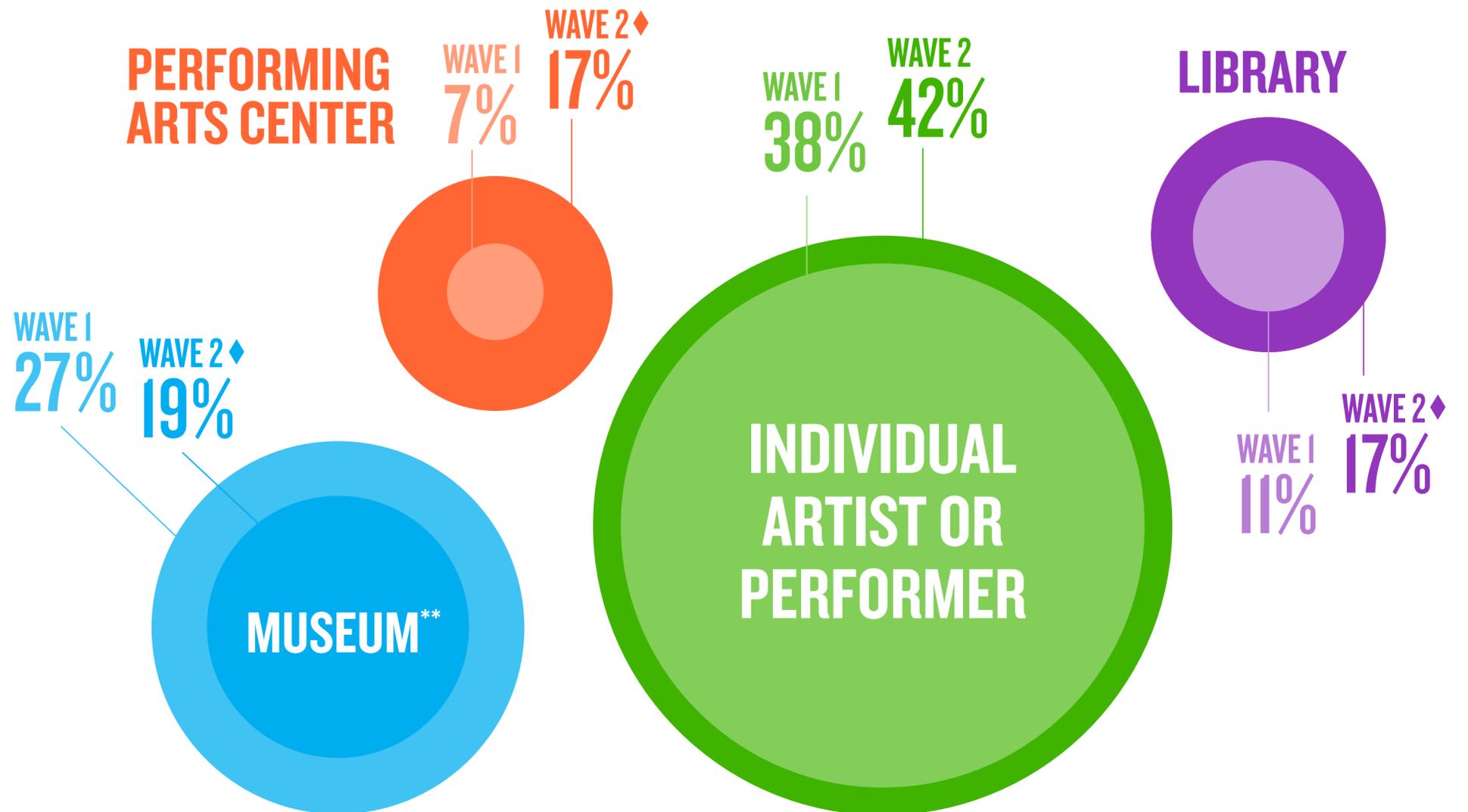
Straight From the Source

Individual artists and performers continue to be the most popular content providers. A sense of personal connection with the artist or work may explain why respondents are choosing to access content directly from those creators.

Q

Who provided the online arts or culture activities that you did?

Please select ALL that apply.



Respondents could select from 18 disciplines in the survey; only the top four trackable disciplines are represented. 13% of respondents selected none of these in the Wave 2 survey.

Wave 1 Q: Were any of those online or digital cultural activities offered by the following organizations or sources?

♦ Difference between waves is statistically significant. **Museums include art, history, science, etc.

Breaking the Paywall

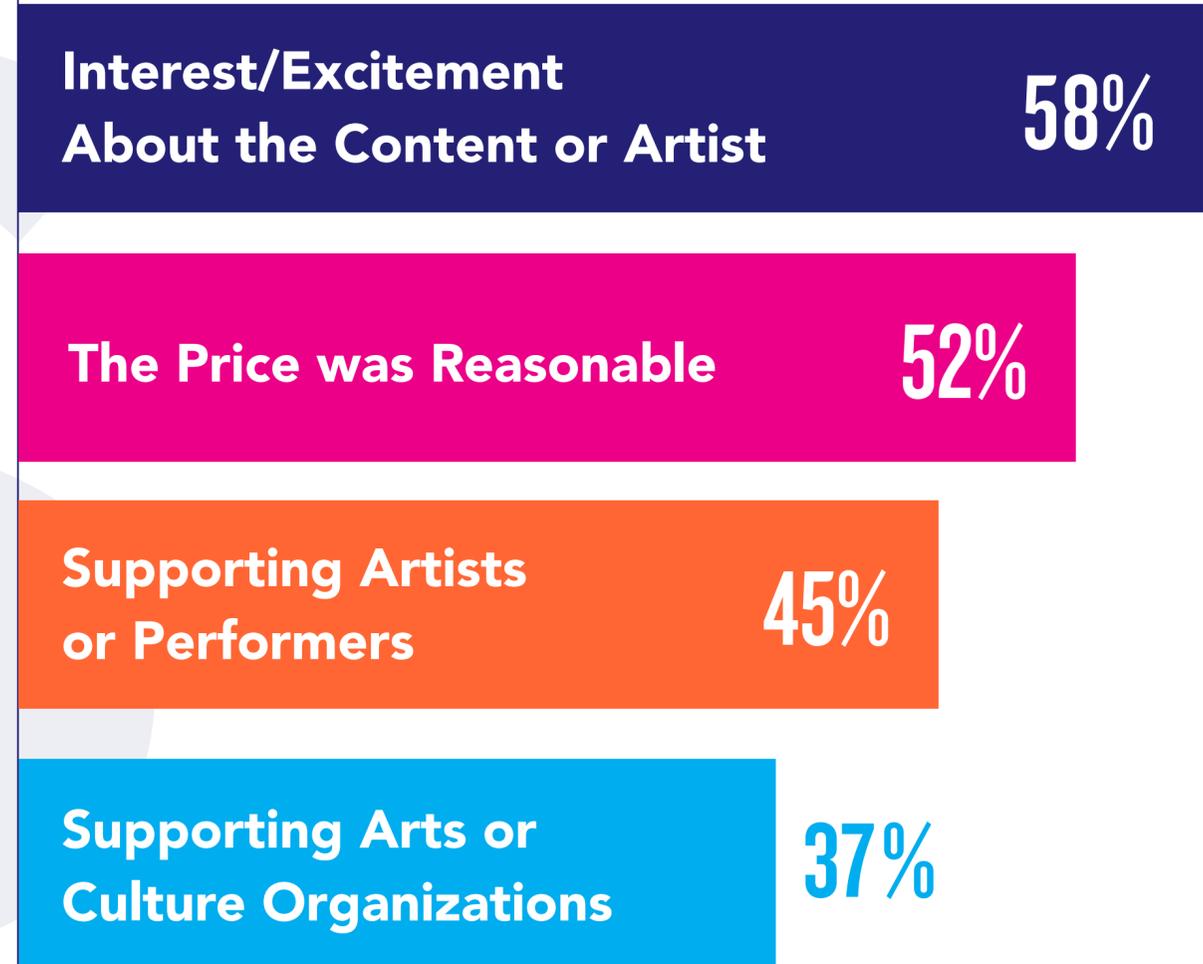
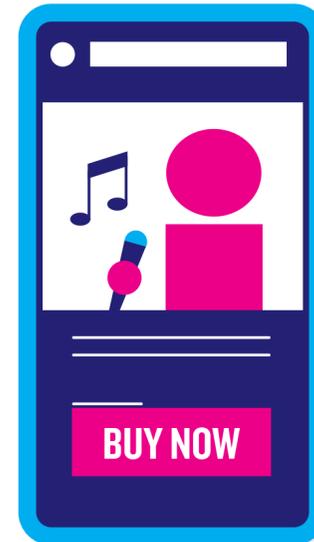
Most respondents value free access to digital content. However, for the smaller portion of people paying to participate, enthusiasm for artists and their content is their top motivation for paying for digital content.

26% who didn't pay for content shared that their financial situation made it difficult to pay.

Q

You shared that you have paid for an online activity from an arts or culture organization over the past year. What made the activity appealing enough for you to pay to participate?

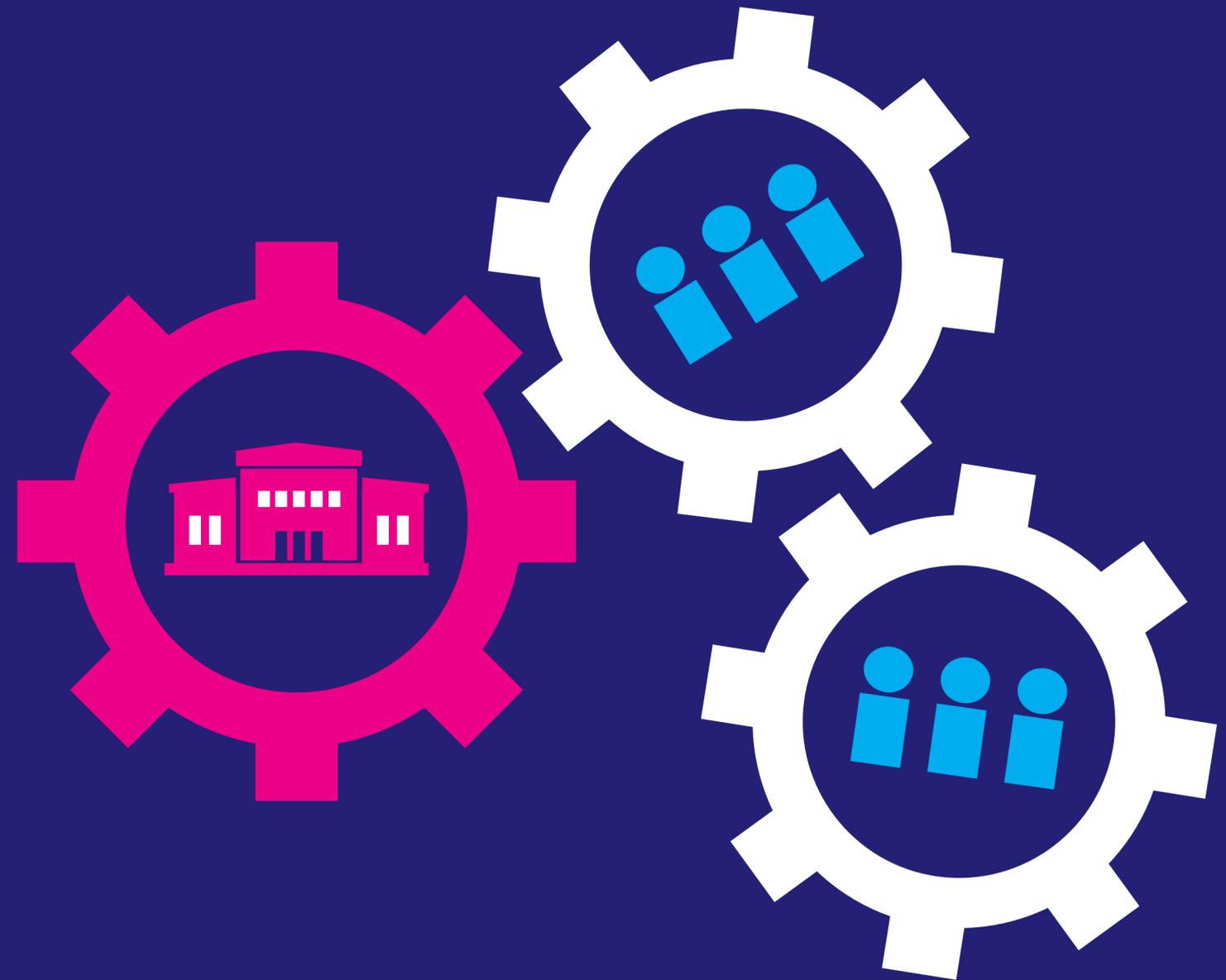
Please select ALL that apply.



Only the top four responses are listed.

The Road to Recovery

The neighboring communities that arts organizations serve can be the ultimate collaborators during challenging times. As people increasingly recognize the value of culture, organizations have an opportunity to create safe experiences that delight communities and meet their diverse needs.



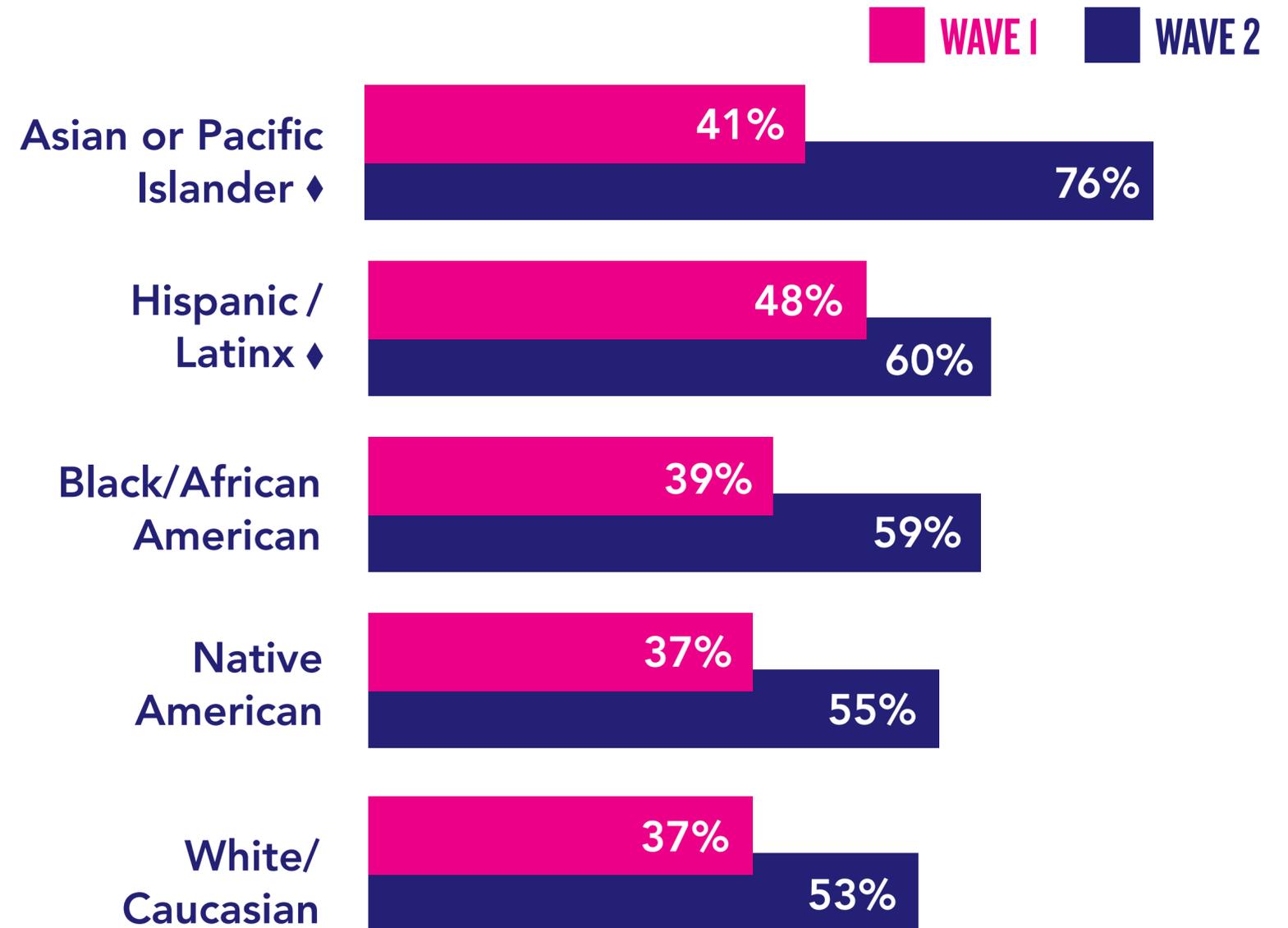
Rising Sentiment of Arts & Culture

Respondents are more likely to feel arts organizations are important a year into the pandemic—this is especially true for BIPOC communities. However, this rising sentiment is also coupled with a strong call for arts organizations to change to become more relevant to more people.

89% identified at least one way they hope arts organizations change to be more relevant to more people.

Q

In general, how important are arts or culture organizations to you, personally?



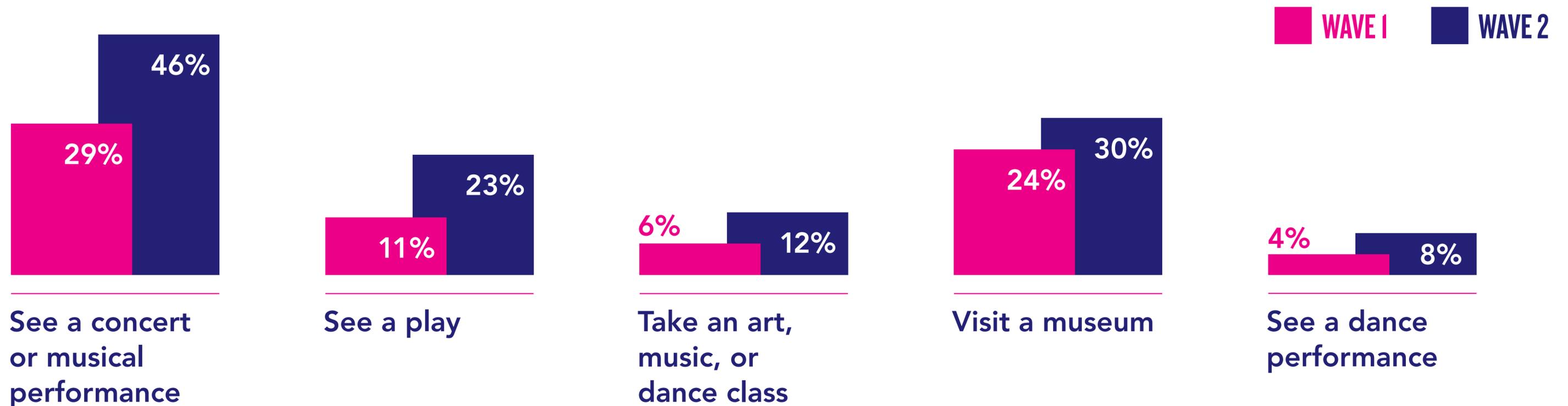
Charts are listed in descending order of Wave 2 importance. ♦ Difference between waves is statistically significant.

Missing Culture IRL



Thinking ahead to when people are able to go out again, what are you most excited to do in the first few weeks?

A year into the pandemic, eagerness to resume some in-person cultural activities has grown. Those showing the greatest increase include activities that have been long-deferred, such as live music and theater.



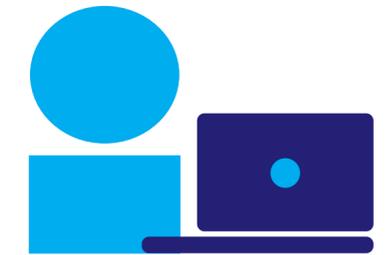
Respondents could choose their top five among 14 activities. Only activities with a statistically significant increase from Wave 1 to Wave 2 are represented. 1% selected none of these. Activities are listed in descending order of point change from Wave 1 to Wave 2. Survey closed on April 30, 2021, when some in-person cultural offerings were still closed.

Reflecting the Diversity of Audiences

Many BIPOC respondents value cultural experiences that reflect their heritage and cultural identities—this holds true for both in-person and digital engagement.



"It is important to me to have a **LOCAL VENUE** that focuses on arts and culture reflective of my cultural identity"



"It is important to me that **ONLINE ARTS OR CULTURE ACTIVITIES** reflect my culture or heritage."

BLACK / AFRICAN AMERICAN	57%	56%
NATIVE AMERICAN	53%	51%
ASIAN OR PACIFIC ISLANDER	52%	37%
HISPANIC / LATINX	43%	48%
WHITE / CAUCASIAN	23%	19%

Data is listed in descending order of importance of cultural identity in a local venue.

Staying Safe

Organizations can influence respondents' decisions to participate in cultural activities in-person by adopting the following safety measures.

49% report that they were fully vaccinated.

Q

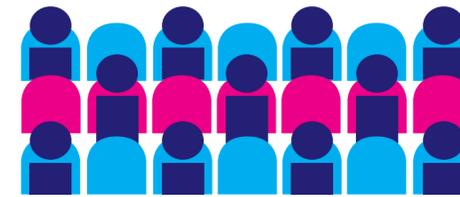
Which safety measures that organizations could provide would most influence your choices about attending in-person arts or culture experiences?

Please select up to FIVE.



61%

Enforcement of masks for visitors



55%

Reduced capacity



52%

Well-managed social distancing



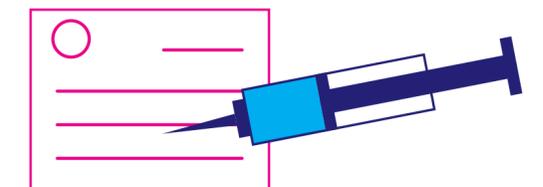
48%

Activities that take place outdoors



37%

Extensive cleaning measures



30%

Requirement to show proof of vaccination

Survey closed on April 30, 2021, before the emergence of the Delta variant and vaccine hesitancy. Respondents could select from eight safety measures. Only activities above 30% are represented. 15% selected "I'm ready to attend with or without these safety measures" and 11% selected "My choice will be influenced by other things that organizations can't control."

Visions of Transformation

The current moment has opened a door to the potential for audiences to use their collective power to enact change. Arts organizations should listen to their communities and support their vision and aspirations for a more just and equitable society.

Nearly 80,000 respondents shared with us the change they want to see and the role that arts or culture organizations can play in manifesting that reality. Now more than ever, Americans believe in the importance of arts or culture in reimagining their future.



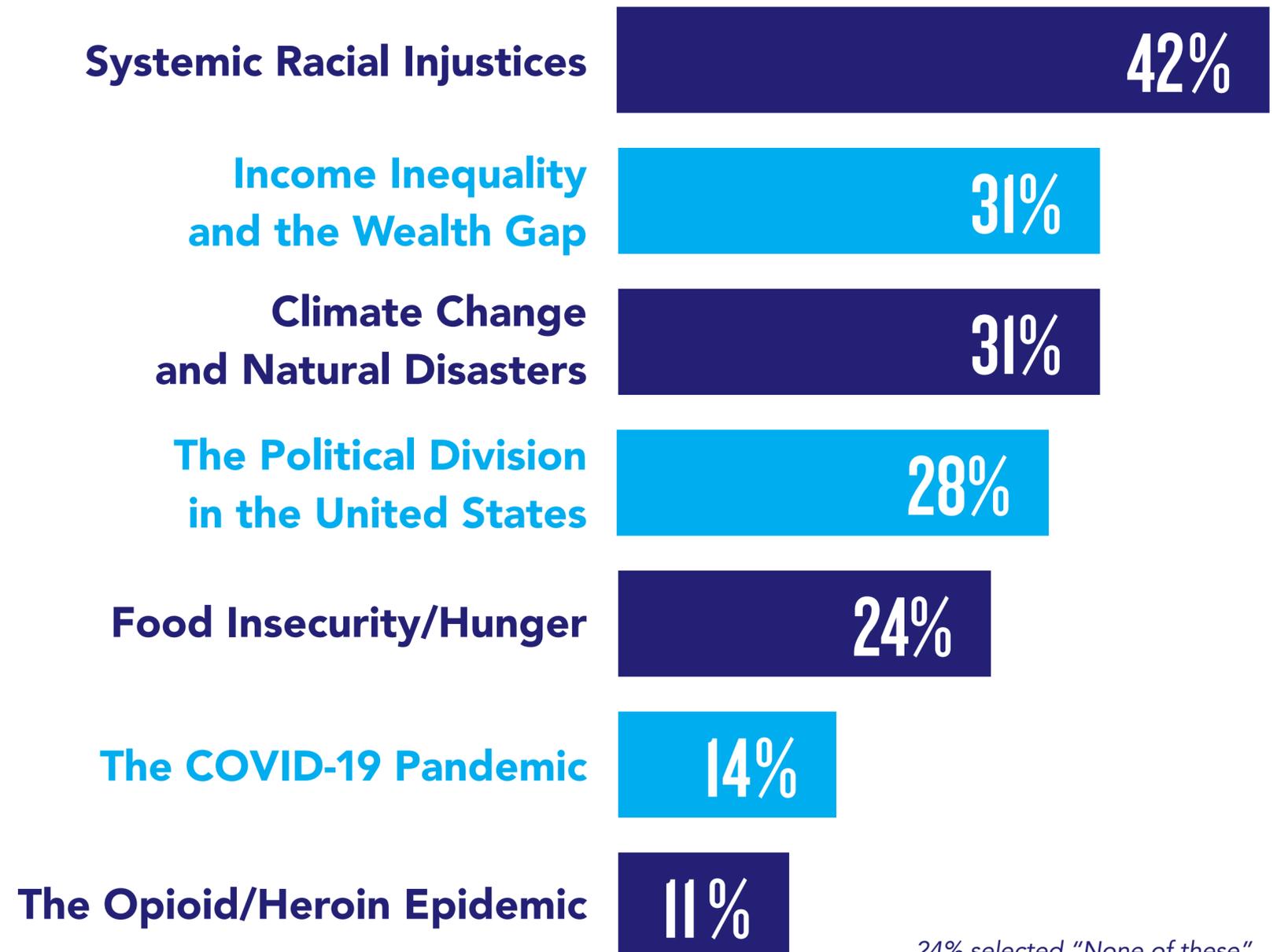
What Matters Most

Most respondents feel arts organizations have a responsibility to tackle social issues, with systemic racism being the top priority.

76% identified one or more social issues they believe arts or culture organizations should address

Q

Which of the following social issues (if any) do you think arts or culture organizations should address?



24% selected "None of these"

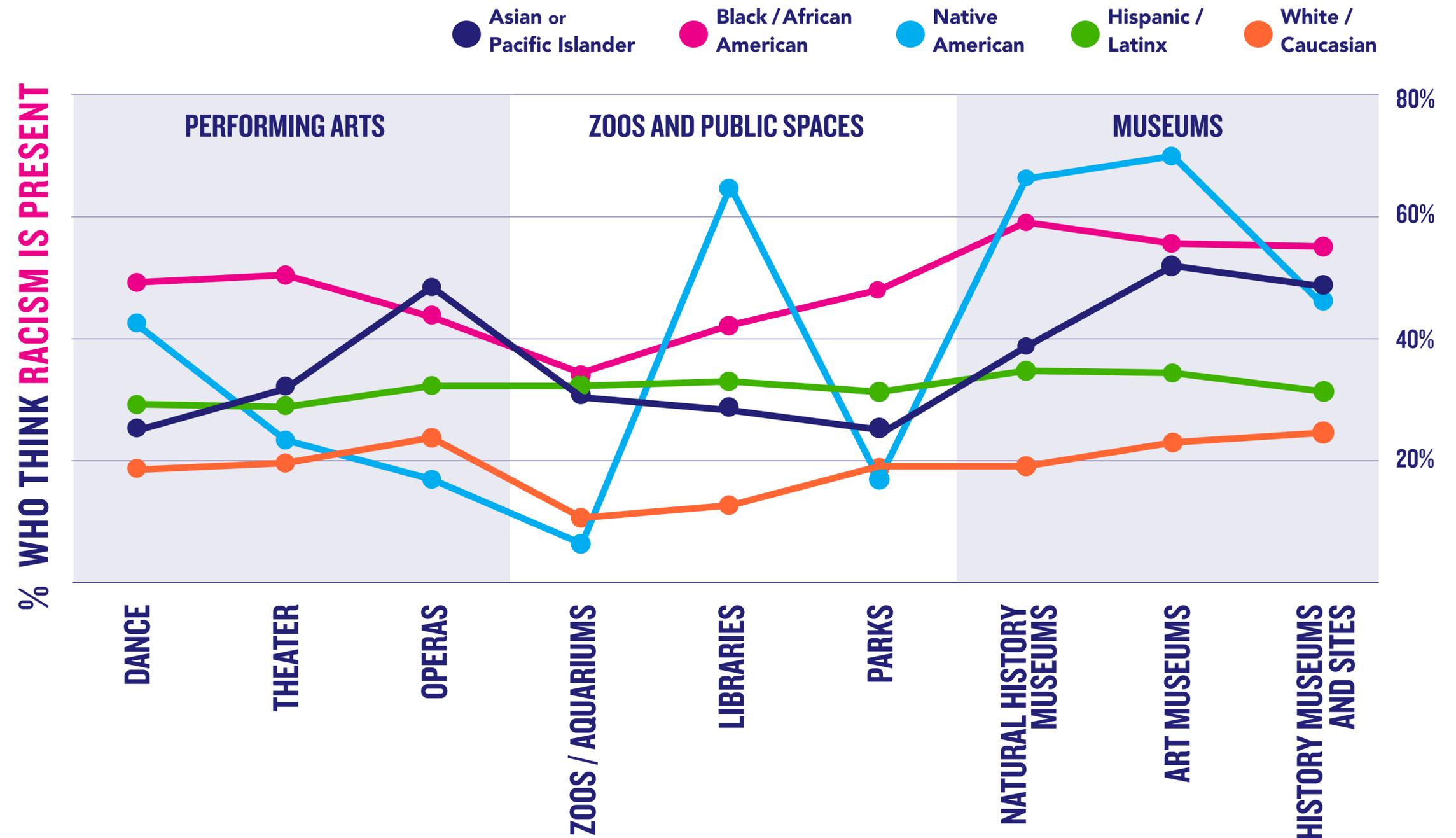
Perceptions of Systemic Racism

Race and ethnicity play a significant role in informing the perceptions and experiences of systemic racism across arts and culture organizations.

15 different types of organizations were included in our survey; recipients were randomly given four organizations to respond to. Five-point scale, top two responses are combined.

Q

Based on what you've seen or heard, do you think systemic racism is present in each of the types of organizations below?

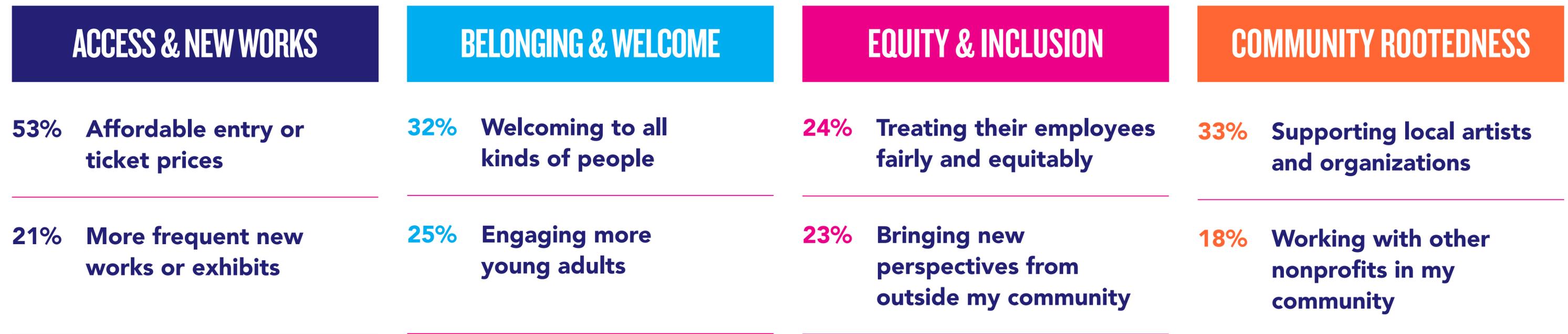


The Change They Wish to See



In general, would any of these types of changes make arts or culture organizations better for you in the future?

Respondents considered the types of change they want to see arts or culture organizations make moving forward. Response patterns revealed four areas of transformation:



Response patterns were grouped into themes using factor analysis. Respondents could select from 18 responses, only top two responses per theme are represented. 11% of respondents did not want to see any changes in arts and culture organizations.

In Conclusion

The pandemic has ignited a period of transformation for the arts and culture sector at large: from the accelerated pivot to new platforms, the demands to address inclusion gaps and systemic racism, to reimagining the role of arts organizations in their communities. These shifts in the sector have been further complicated by the unprecedented economic and safety challenges arts organizations have faced throughout the crisis. Throughout *Culture + Community: A Special Edition of Culture Track*, we have committed ourselves to presenting valuable data and actionable insights to arts organizations in hopes of providing a clearer picture of trends and shifts as they continue to unfold.

With the results from this survey we are seeking to break down prevailing assumptions and inequitable systems in order to usher in a new era for arts and cultural organizations to question and manifest their future.

Implications

Promote community well-being.

Many people are still struggling physically, emotionally, and financially. Arts and culture organizations can play a role in community healing and recovery, even as they navigate their own organizational rebound.

Embrace the possibilities of hybrid experiences.

Design cultural offerings where in-person and online engagement can coexist to increase accessibility and create impactful experiences.

Audiences are seeking activities that connect, educate, and expand their horizons both on and offline. Digital can be a tool to help meet these needs for more people through a hybrid approach.

Identify what matters most to your community to co-create new possibilities.

Audiences believe in the importance of arts organizations and see the critical role arts and culture can play during times of uncertainty and change. Arts organizations can serve communities by taking a stand on the issues they are best poised to address, collaborating with them along the way.

Take a holistic approach to diversity, equity, and inclusion.

Instead of treating racial diversity as a metric, embrace equity as a practice that informs every facet of how your organization works, from decision-making and workforce representation to programming and community engagement. Reflecting the diversity of communities and creating equitable internal structures are interconnected goals that are necessary for continued relevance.

We're grateful to our funders and partners for their vital support:



We invite new partners and collaborators to join in this effort.

**We'd like to thank our Advisory Group for generously
volunteering their time, input, and perspectives.**

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Senior Social Scientist, formerly Smithsonian Institution, currently Thinc Design

Rob Fields

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Pauline Kanako Kamiyama

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THANK YOU

to the arts or culture organizations,
advisors, and thousands of
respondents who gave their voices,
time, and effort to shape the
insights of this study.

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COMMUNITY**

IN A TIME OF
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