Sustainable Cultural Futures

COVID-19 and Resetting Cultural Policy

Survey Findings: Cultural Engagement and Cultural Values

December 2022

Sana Kim, Hye-Kyung Lee
and Kirsty Warner

UKRI Economic and Social Research Council

King's College London

Contents

List of Figures **4**

About the authors **6**

Acknowledgements **8**

1. Introduction **9**

1.1. About Sustainable Cultural Futures: COVID-19 and Resetting Cultural Policy **9**

1.2. About the survey **11**

1.2.1. Methodology 11

2. Key Questions **12**

2.1. On the meaning of creativity and interest in the arts and culture **13**

2.1.1. Creativity is more associated with art than culture 13

2.1.2. Who is interested in the arts? Who is not? 15

2.1.3. Engagement, interest and participation in culture and the arts during childhood 19

2.2. Engagement in culture and the arts **22**

2.2.1. Important forms of cultural/artistic engagement 22

2.2.2. Attendance of culture and the arts 24

2.2.3. Online attendance and the impact of COVID-19 25

2.2.4. Participation in culture and the arts 31

2.2.5. How does the public prefer to participate in/access culture and the arts? 34

2.2.6. Some ways to improve participation 36

2.2.7. Participation in social organisations/activities 37

2.2.8. Satisfaction, engagement and interest in culture and the arts locally 38

2.3. Outlook on cultural policy **45**

2.3.1. Culture and the arts have multiple values for the public 45

2.3.2. Awareness of and attitude on public subsidies for culture and the arts 52

2.3.3. Goals and values for cultural policy and local cultural organisations 55

3. Conclusion 59
3.1. Summary of key findings 59
3.2. Avenues for future research 62
4. Appendices 63
4.1. Appendix 1. Sample composition 63
4.2. Appendix 2. Preference on how to participate in different art forms 68

List of Figures

Figure 1. Meaning of creativity 14
Figure 2. Interest in the arts 15
Figure 3. Demographic profile of those interested in the arts 16
Figure 4. Continuity of the lack of interest in culture and the arts 17
Figure 5. Attendance of cultural events and venues during childhood 19
Figure 6. Interest and participation in cultural/artistic activities 20
Figure 7. Important forms of cultural engagement 22
Figure 8. Attendance comparison 24
Figure 9. Events viewed and paid for online 25
Figure 10. Events viewed and paid for online across different groups 27
Figure 11. Preference for viewership of and participation in cultural events 28
Figure 12. The impacts of COVID-19 on the public's attitudes to culture and the arts 30
Figure 13. Participation in cultural/artistic activities 31
Figure 14. Participation comparison between childhood and today 33
Figure 15. Most common participation method by activity 34
Figure 16. Most common methods of participation and most common activity for each method 35
Figure 17. How to increase cultural participation 36
Figure 18. Involvement with social organisations/activities by interest in the arts 37
Figure 19. Attitudes towards local cultural environment 39
Figure 21. Barriers to cultural engagement in one's local area: the lack of... 41
Figure 22. Ways to improve local cultural environments 42
Figure 23. Interest in local cultural activities by local venues 43
Figure 24. Interest in local cultural activities by local organisations 44
Figure 25. Roles and contributions of culture and the arts within individual lives 46
Figure 26. Roles and contributions of culture and the arts within society 47
Figure 27. Roles and contributions of culture and the arts for local life 48
Figure 28. Recognition of the value in culture and the arts across different groups 50

Figure 29. Awareness of and attitudes to public subsidy for culture and the arts 52
Figure 30. Suitable measures to support artists directly.....53
Figure 31. Preferred beneficiaries of public subsidy for culture and the arts.....54
Figure 32. Important goals for government cultural policy.....55
Figure 33. Important social values for government cultural policy.....56
Figure 34. Important values for local cultural organisations 57

About the authors

← Sana Kim

Sana Kim is a postdoctoral researcher in the Department of Culture, Media and Creative Industries at King's College London. Within the broader focus on the creative industries/economies, she is interested in cultural policy, creative work and creative ecologies/ecosystems. Her PhD explored the impacts of the capital city relocation, that took place in Kazakhstan in 1997, on the subsequent creative development of Kazakhstan's new (Astana) and the former (Almaty) capital cities. After completing her PhD, she worked on a collaborative EU project titled DISCE (Developing Inclusive & Sustainable Creative Economies), which was looking at improving the growth of creative economies across Europe.

Hye-Kyung Lee →

Hye-Kyung Lee is Professor of Cultural Policy at the Department of Culture, Media and Creative Industries, King's College London, UK. She is interested in relations between the cultural sector, the state and the market and has worked on cultural policy, arts subsidy, creative industries, cultural industry policy, copyright and the Korean Wave. Her publications include Cultural Policies in East Asia (2014), Asian Cultural Flow (Springer 2018), Cultural Policy in South Korea (Routledge 2019), and Routledge Handbook of Cultural and Creative Industries in Asia (2019). She co-edits Cultural Trends. In addition to leading the ESRC funded Sustainable Cultural Futures (2022-2025), she is co-leading the ESRC Network on Globalizing South Korean Creativity (2022-23).

← Kirsty Warner

Kirsty Warner is a London Arts and Humanities Partnership (LAHP) funded PhD student in the Department of Culture, Media and Creative Industries at King's College London. She is broadly interested in understanding how policy change impacts organisational practice, with her PhD investigating how the UK-EU relationship has impacted UK national museums. Kirsty has worked as a Research Assistant on several academic projects and within the House of Lords, for The Rt Hon. Baroness Chakrabarti CBE. In 2022, she was awarded Arts Council England Developing your Creative Practice fund for her personal development project 'Curate, Manage, Conserve: From Theory to Practice' and has previously received a UACES Scholarship to support fieldwork.

Acknowledgements

The Economic and Social Research Council supported the survey via the Fund for International Collaboration [Grant Ref: ES/W011891/1]. The authors would like to thank Joe Shaw, Andrew Mowlah (Arts Council England), Mark Taylor, and Steven Hadley for helping develop the survey questions. Many thanks to William Enever (Savanta) for his support throughout this project. We also benefited from the insight of our colleagues at King's College London, particularly Dr Lauren England who reviewed an earlier version of this report. Finally, thanks to Jamie Stein for the design work that has brought this report to life.

1. Introduction

1.1. About Sustainable Cultural Futures: COVID-19 and Resetting Cultural Policy

Sustainable Cultural Futures: COVID-19 and Resetting Cultural Policy (SCF) is one of ten UK-Japan collaborative research projects aimed at tackling various challenges induced by the COVID-19 pandemic. The ten projects were jointly awarded by the Economic and Social Research Council (ESRC), the Arts and Humanities Research Council (AHRC) and the Japan Society for the Promotion of Science (JSPS). The main objective of these projects is to generate new knowledge and understanding around a range of issues of major public and policy interest that, in turn, can be used for managing the effects of the global pandemic. Being part of such endeavours, the SCF project marks the first major UK-Japan scholarly collaboration in cultural policy research.

Led by King's College London (UK) and Doshisha University (Japan), the project builds on previous research which suggests that the pandemic has opened up a moment of 'critical juncture' for cultural policy – a short period of significant change where new actors and policy ideas emerge, and important decisions are made, engendering consequential effects on the future development of cultural policy.[1] Pre-pandemic cultural policies across many countries were based on assumptions that it is appropriate to express cultural policy goals in economic terms (i.e., contributions of culture to GDP), that the priority for state support should go to cultural organisations (as opposed to cultural workers), and that culture and the arts can thrive on in-person interactions in physical venues. With venues being closed and projects postponed or cancelled – in turn, leaving many artists and creative workers without an income and forcing these workers, as well as organisations, to join the digital arena – the pandemic has brought about a moment where the existing assumptions are seriously challenged, and new approaches are sought.

[1] Lee, H.-K., Chau, K. and Terui, T (2022). The covid-19 crisis and 'critical juncture' in cultural policy, International Journal of Cultural Policy, 22(2): 145-165.

The SCF project takes a mid- to long-term perspective to reconsider the pre-pandemic assumptions, explore new frontiers for cultural policy studies and build a more sustainable future for the arts and culture. To achieve this, we focus on three themes:

Theme 1

The values of culture and the purposes of cultural policy: How has COVID-19 changed our perceptions of culture, and what new social consensus is emerging regarding the values of culture and the purpose of cultural policy?

Theme 2

Institutions of cultural work: How do existing 'institutions of cultural work' function? What are the potential ways for them to evolve to more effectively tackle the precarity in cultural work exacerbated by the pandemic?

Theme 3

Digitalised cultural consumption: How do cultural organisations reconcile their beliefs in materiality and 'live' with the new digital necessity? Whether and how can the online delivery of digitalised cultural content bring larger and broader audiences to culture?

Generating original findings on the shifting understandings, practices and purposes of cultural policy, the project's comparative approach will offer unique opportunities for UK-Japan cross-national conversation and understanding around more sustainable cultural policy futures.

1.2. About the survey

This survey report is the first deliverable of the SCF project by the UK research team (King's College London) on Theme 1. The core aim of Theme 1 is to examine the changing understanding of cultural values and the purposes of cultural policy in the context of COVID-19. To contribute to the Theme 1 discussion, a public opinion survey was carried out in each country. This report summarises the key findings from the UK survey (England). Here, we investigated the public's perception of culture, their cultural life, and their understanding of cultural values and cultural policy. The summary of our objectives is as follows:

- Identify what the English public sees as part of cultural life;
- Identify and describe the new and emerging social consensus regarding 1) the values of culture and the arts as well as 2) the purposes of cultural policy;
- Understand the public's attitudes to culture and the arts in the context of the pandemic;
- Map the value and contributions of culture and the arts;
- Identify key priorities for cultural policy and public arts funding.

1.2.1. Methodology

This report is based on the data collected by Savanta through a 20-minute online survey. In total, 2,123 English adults completed the survey across a demographically representative sample of age, gender, region, social grade, ethnicity and income. The data collection was conducted between the 18th and 30th of August 2022 (see Appendix 1 for the sample composition). The key sets of themes and questions explored in the survey are outlined in the next section.

2. Key Questions

The findings are articulated under three headings. First, section 2.1 starts exploring the public's understanding of the term 'creativity', exposing some gaps between policymakers' and people's everyday understanding of 'creativity' as well as 'culture' and 'arts'. It then moves on to examine the public's interest in the arts. Here, we seek to understand who is interested in the arts and who is not. After discovering that interest in the arts is 'sticky' (see 2.1.2) and is likely to originate from childhood, the section moves on to explore the levels of interest and engagement in culture and the arts during survey participants' childhoods (see 2.1.3).

Next, section 2.2 explores the public's interest and engagement with culture and the arts as adults. This section seeks to understand how the public engages with culture and the arts – first overall, and then specifically in local contexts (see 2.2.8) – providing some answers to the following questions: What are the most important forms of cultural engagement for the public? What are the most (and least) attended cultural/artistic events? What are the most (and least) popular activities of cultural/artistic participation? How does the public prefer to participate in culture and the arts? How has COVID-19 impacted the public's engagement with culture and the arts? What can be done to alter the levels of engagement/participation? Findings covered within this section could be of particular interest to policymakers and cultural/artistic organisations in the UK who recently found themselves within the movement for cultural democracy and are committed to facilitating more proactive involvement of the public in the cultural life of the country. Unlike the democratisation of culture – a process that opens up (pre-defined) culture to many – cultural democracy is 'a state in which everyone feels empowered to actively participate in the broadest range of cultural activity'.[2]

Finally, section 2.3 starts by unpacking the importance of culture and the arts and their role in the eyes of the adult population of England (2.3.1). Here, the key questions are: Why are culture and the arts important to the public? What perceived value(s) do they have? Are certain values more important than others? Then we move on to examine the public's outlook on cultural policy and public arts funding, aiming to delimit the boundaries/scope of cultural policy, as perceived by the public, through the exploration of the public's opinion on the importance of various goals and social values for government cultural policy and local cultural organisations.

[2] 64 Million Artists. (2018). Cultural Democracy in Practice. https://www.artscouncil.org.uk/sites/default/files/download-file-CulturalDemocracyInPractice.pdf

2.1. On the meaning of creativity and interest in the arts and culture

2.1.1. Creativity is more associated with art than culture

> “There is a huge disconnect between the public’s idea of culture and what it is for, and the way that politics and policy talks about it”.[3]

English adults appear to ascribe a wide range of meanings to the word ‘creativity’. Interestingly, significantly more people associated creativity with ‘art’, than with ‘culture’ (see Figure 1). This is noteworthy given that cultural policymakers often approach culture and creativity as closely related terms and phenomena, as seen from the Arts Council England’s most recent 10-year strategy, *Let’s Create*, which gives preference to the terms ‘culture’ and ‘creativity’ over ‘art’.[4] In this 10-year strategy report, ‘culture’ is an umbrella term that incorporates a full breadth of creative activity that the Arts Council supports. In contrast, the terms ‘the arts’ and ‘artist’ are regarded as somewhat exclusive. Creativity, in turn, is seen as proliferating in ‘the process of making, producing or participating in culture’.[5] This commitment to a more inclusive/broad term has been motivated by the belief that people who do not engage with the arts can have active cultural lives. Interestingly, our findings show that the public associate ‘creativity’ more with ‘art’ (including different art forms) and much less so with ‘culture’, spotlighting the gaps between policymakers’ and people’s everyday understanding of these terms. However, the bottom line is that ‘creativity’ has a wide range of meanings to the public.

[3] Holden, J. (2006). Cultural Value and the Crisis of Legitimacy: Why culture needs a democratic mandate. London: Demos.

[4] Arts Council England. (2020). Let’s Create: Strategy 2020-2030. https://www.artscouncil.org.uk/sites/default/files/download-file Strategy%202020_2030%20Arts%20Council%20England.pdf

[5] Arts Council England. (2020). Let’s Create: Strategy 2020-2030. https://www.artscouncil.org.uk/sites/default/files/download-file Strategy%202020_2030%20Arts%20Council%20England.pdf (p.12)

Figure 1. Meaning of creativity

N=1623 responses

'Art' n=265 (16%)

'Imagination' n=96 (6%)

'Artist/Artistic' n=59 (4%)

'Paint' n=53 (3%)

'Music' n=47 (3%)

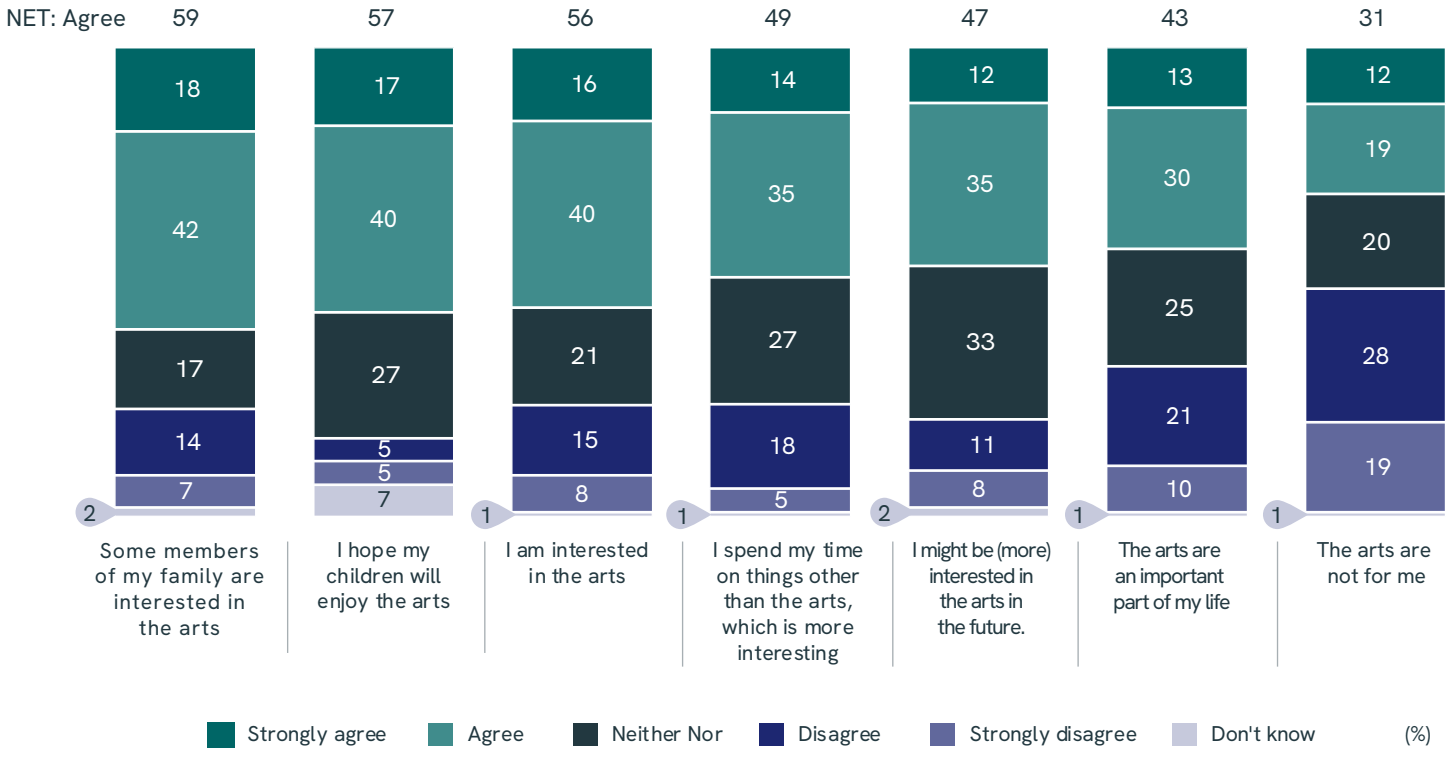
Only 2 people said 'Culture'

Q34. When you hear the word 'creativity', what comes into your mind immediately?

2.1.2. Who is interested in the arts? Who is not?

As evident from Figure 2 below, over half (56%) of the public appears to be interested[6] in the arts, and a similar proportion (57%) expressed hope that their children will enjoy the arts. Just under half (47%) indicated that they might be (more) interested in the arts in the future. If we include those who are neutral – neither interested nor uninterested – just over two-fifth (43%) of the English public can be categorised as not interested in the arts. About a third (31%) of participants agreed with the statement: 'the arts are not for me', with men slightly more likely to say so (38%).

Figure 2. Interest in the arts

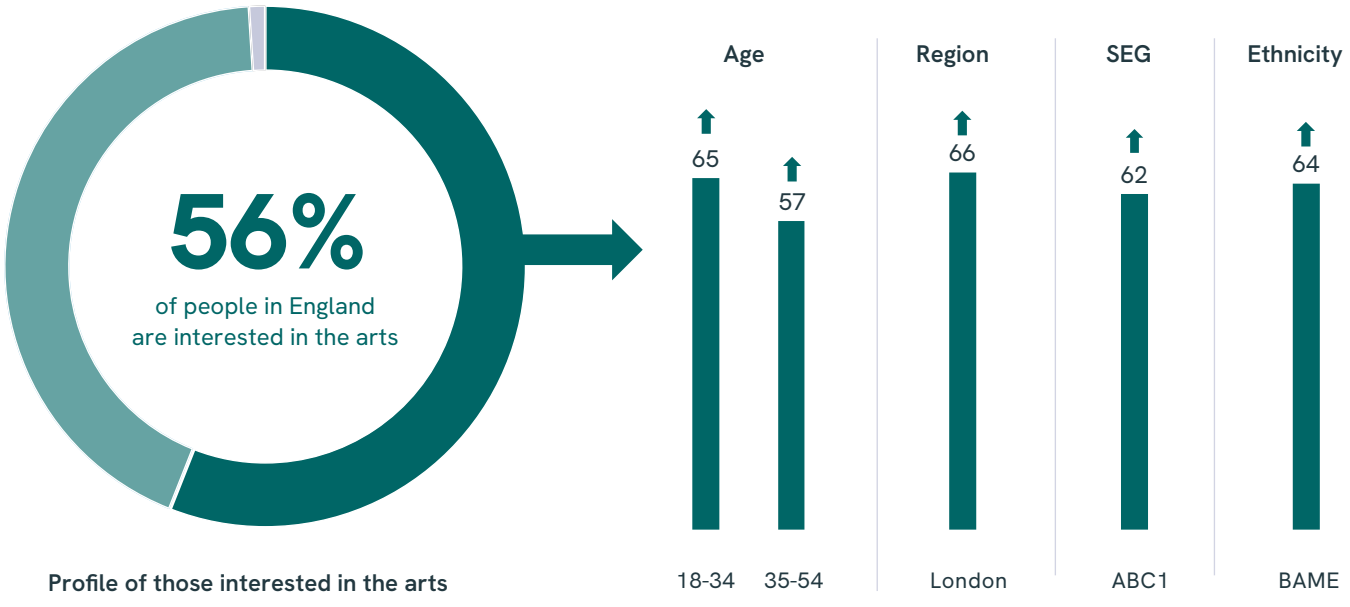


Q2. How much do you agree with the following statements? Base: All respondents: (n=2123)

[6] The term 'interest' was open to interpretation of the survey participants.

Interest in the arts does not appear to vary significantly with gender but does vary with age; 65% of under-35-year-olds expressed interest in the arts, in comparison with 48% of those aged 55 or over (see Figure 3). In addition to age, interest in culture and the arts also varies across regions and with social grade. Those interested are more likely to be young (18-34), residing in London and belonging to higher social grades[7] – ABC1 as opposed to C2DE.[8] The data also suggests that ethnic minorities are more likely to be interested in the arts than their white counterparts. Interestingly, the former is also slightly more likely to say that the arts are not for them, with 37% saying so (see 3.2 for further reflections on ethnic minorities).

Figure 3. Demographic profile of those interested in the arts[9]



Q2. How much do you agree with the following statements? Base: All respondents: (n=2123)

[7] National Readership Survey (NRS). Social Grade. https://www.nrs.co.uk/nrs-print/lifestyle-and-classification-data/social-grade/

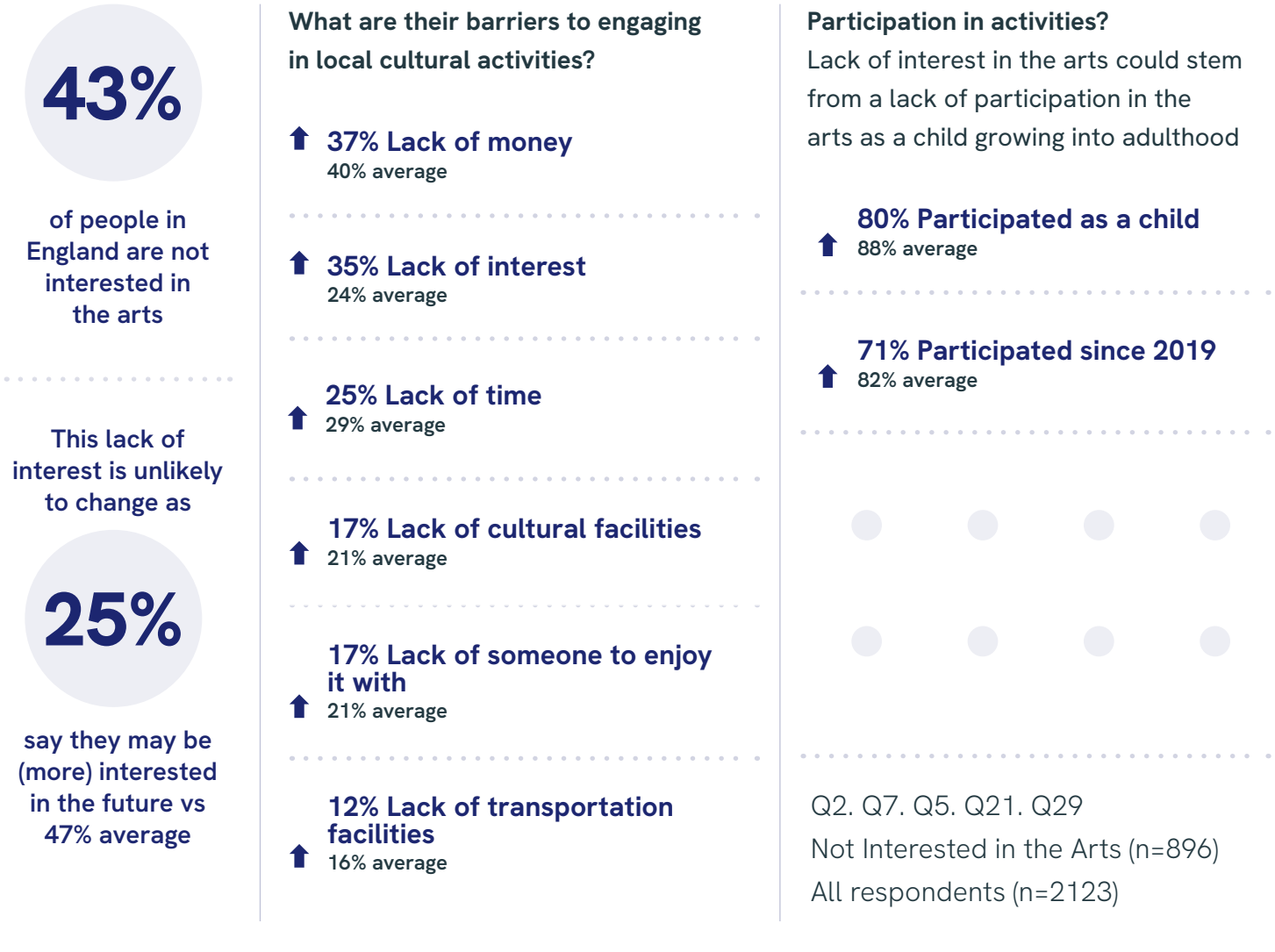
[8] NRS social grade is a classification system based on occupation. ABC1 and C2DE equate to middle and working class, respectively.

[9] Arrows in either direction in the chart indicate a significant difference, based on significance testing at a 95% confidence level.

The most significant regional variation in interest in the arts is between Yorkshire & Humberside (46%) and London (66%).

The data suggests that the lack of interest in culture and the arts is sticky (see Figure 4). First, the lack of interest is unlikely to change – at least on its own – as only 25% of those not interested admit the possibility of becoming (more) interested in the future, compared to 47% on average. Second, for those not interested, the lack of interest (35%) is the second most significant barrier to engaging in local cultural activities, significantly overshadowing other obstacles such as lack of time (25%), lack of cultural facilities (17%), and lack of transportation (12%) (see 2.2.8 for a more detailed discussion on public's engagement with culture and the arts locally). Finally, the lack of interest could stem from a lack of participation in the arts as a child growing into adulthood, as those who are not interested in the arts today were less likely to participate as children (see 2.1.3 for a discussion on childhood participation).

Figure 4. Continuity of the lack of interest in culture and the arts



The stickiness or continuity of "uninterestedness" in the arts brings to the forefront an important conflict in England's policy sphere. On the one hand, policymakers want to broadly increase public engagement with the arts and culture. On the other hand, impacted by the austerity policy and strong STEM agenda, they have marginalised the role of culture and the arts in the public education system as cuts per capita funding for education have disproportionately affected arts education.[10] The impacts are clearly evident from the decline in teaching hours for arts subjects and the number of arts teachers schools (can afford to) employ.[11]

In light of the rising cost of living in the UK and the approaching wave of further budget cuts, the schools are under renewed pressure to cut costs further, which again will affect the provision of 'extra' services such as, for example, school trips, afterschool clubs and arts subjects the most.[12,13] In turn, this inevitably will adversely impact on how much children participate in culture and the arts, especially among those from more vulnerable backgrounds.

[10] Ashton, H., & Ashton, D. (2022). Creativity and the curriculum: educational apartheid in 21st Century England, a European outlier? International Journal of Cultural Policy, https://doi.org/10.1080/10286632.2022.2058497

[11] UK Parliament. (2021). Arts education in secondary schools. Retrieved November 16, 2022, from https://lordslibrary.parliament.uk/arts-education-in-secondary-schools/

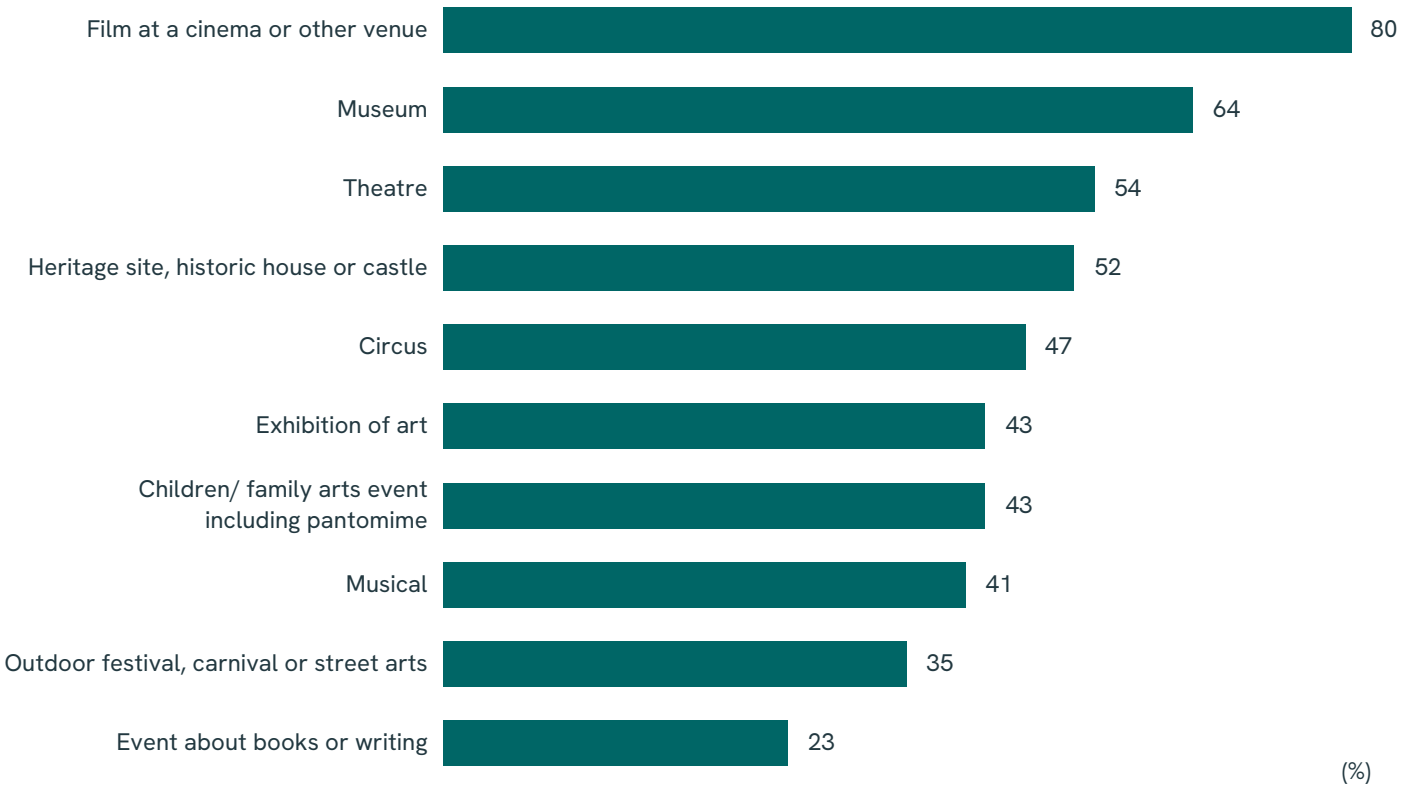
[12] BBC. (2022). School trips could be axed in bid to keep staff. https://www.bbc.co.uk/news/education-62670576

[13] BBC. (2022). Schools to cut staff in budget squeeze, union says. https://www.bbc.co.uk/news/education-63518326

2.1.3. Engagement, interest and participation in culture and the arts during childhood

Watching a film is the most popular cultural event during childhood, with 80% of English adults saying that up to the age of 16, they had attended/visited a cinema or other venue at least once (see Figure 5). This is followed by museums (64%), theatres (54%) and heritage sites (52%), suggesting that traditional cultural venues play an important role in the cultural lives of young people, or at least they did in the past.

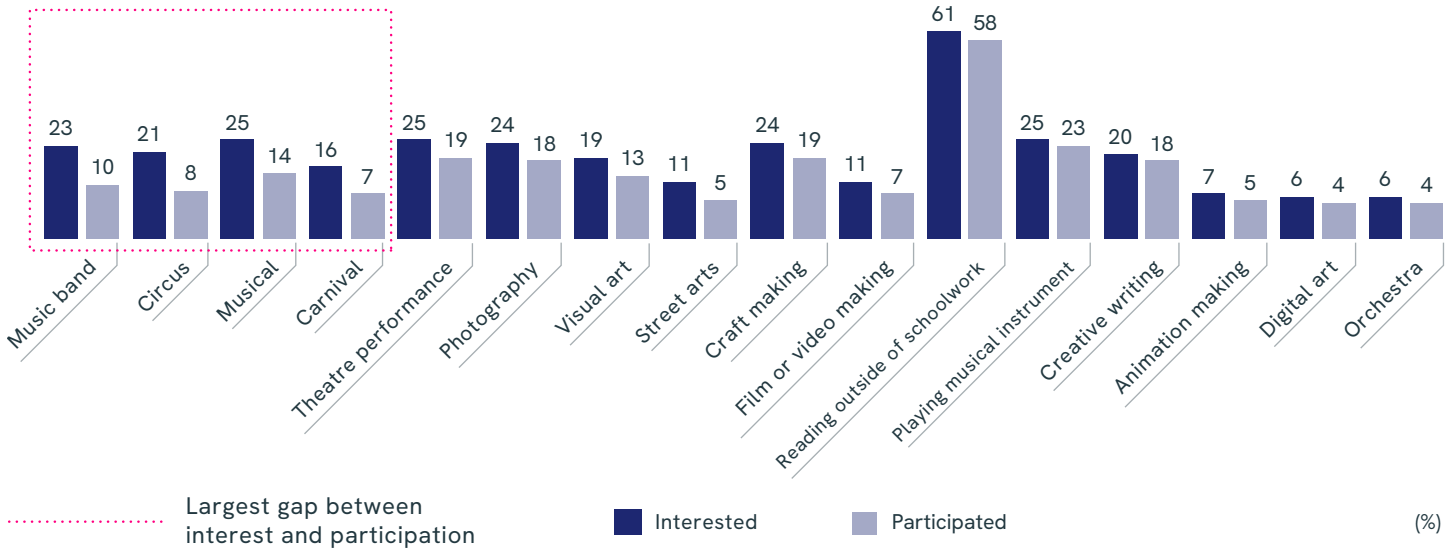
Figure 5. Attendance of cultural events and venues during childhood



Q3. During your childhood and school years up to the age of 16, had you ever attended/visited the following event? Base: All respondents: (n=2123)

Reading appears to be the most widespread in terms of personal cultural/artistic interests during childhood, with 61% of English adults saying they were interested in reading outside of schoolwork as children. With a wide margin, it is followed by interests in theatre performance (25%), musical (25%), singing/choir (25%), playing a musical instrument (25%), photography (24%) and being involved in a music band (23%). As for cultural/artistic *participation*[14] during childhood, reading appears to be the most widespread activity as 58% of English adults said they read outside of schoolwork during their childhood (see Figure 6). For reading, participation levels are consistent with the interest levels, suggesting that there were few barriers to fulfilling one's interest in reading. Again, with a wide margin, reading is followed by participation in activities such as playing an instrument (23%), singing/choir (24%), theatre performance (19%), craft making (19%), photography (18%) and creative writing (18%).

Figure 6. Interest and participation in cultural/artistic activities



Q4. During your childhood and school years up to the age of 16, were you interested in the following?
Q5. During your childhood and school years up to the age of 16, had you ever participated in any of the following activities? Base: All respondents: (n=2123)

[14] Participation means that a person actively contributes to an artistic/cultural activity as opposed to being a passive consumer/spectator.

Interestingly, despite the high cost of musical instruments and private lessons, interest and participation in playing a musical instrument appears to be matched (25% and 24%, respectively). A further comparison of interest and participation trends during childhood spotlights some potential issues with access to musical theatre, music band, circus, and carnival.

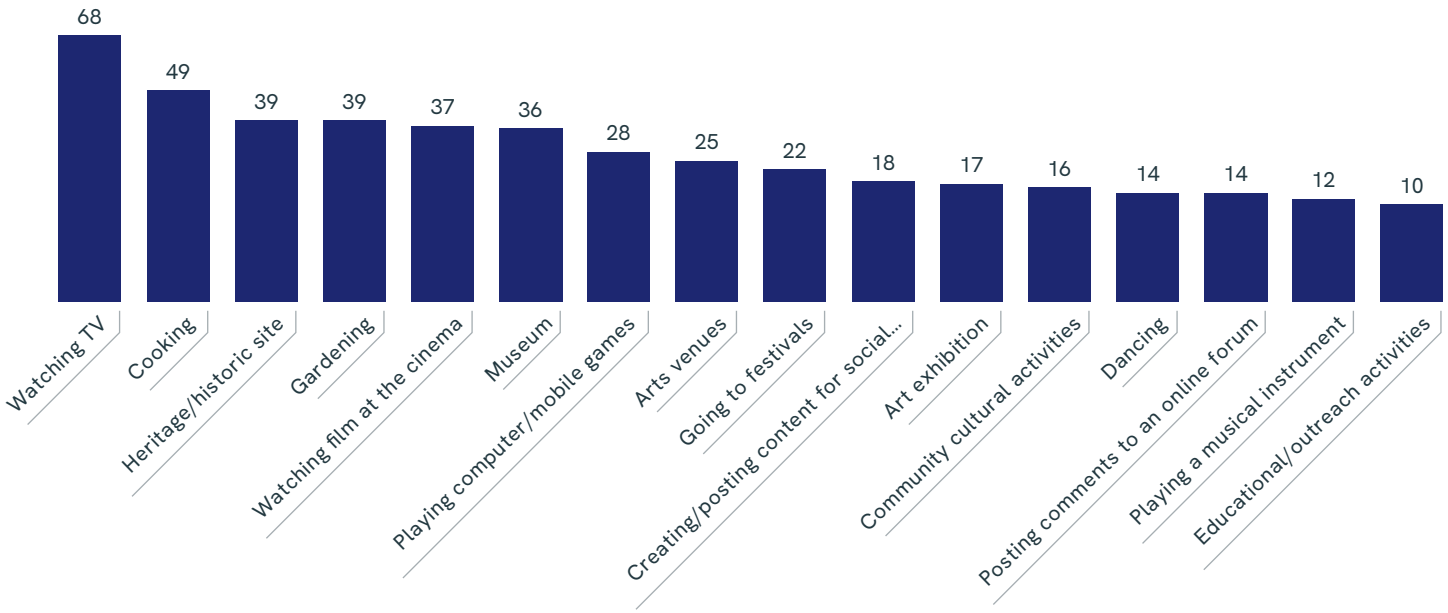
Finally, here we would like to highlight that those who did not participate in cultural/artistic activities as children are more likely to grow up into adults that are not interested in the arts. For example, on average, 58% of the public read outside of schoolwork during childhood (as evident from Figure 6 above). This goes down to 49% among those participants who are not interested in the arts. The same dynamic applies to almost all cultural/artistic activities tested in the survey, meaning that adults who are interested in the arts are more likely to have participated across all cultural/artistic activities tested in the survey, except for circus, where participation levels are the same for both interested and not interested in the arts (8%).

2.2. Engagement in culture and the arts

2.2.1. Important forms of cultural/artistic engagement

Watching TV is the most important form of personal cultural engagement (see Figure 7). This is followed by cooking (49%) and gardening (39%) – the two activities that can be performed in the comfort of one's home – and only then followed by activities that require attending/visiting a venue such as a heritage/historical site (39%), a cinema (37%), or a museum (36%).

Figure 7. Important forms of cultural engagement



Q1. Which among the following are important for your cultural engagement?
Base: All respondents: (n=2123)

These are then followed by activities that involve some aspect of active participation, including creating/posting content (18%) and comments online (14%); taking part in cultural activities in one's local community (16%); dancing (14%); and playing a musical instrument (14%).

Finally, the most niche forms of cultural engagement, reported by 10% of the public or less, include: taking part in educational/outreach activities at cultural venues (10%); clubbing (10%); volunteering at a cultural venue, festival, etc. (8%); taking part in an amateur club (7%); and crowdfunding related to culture and the arts (6%). Evidently, cultural/artistic activities, which require more active participation and, therefore, more time, are less important for the public's cultural engagement except for cooking and gardening. Interestingly, an overwhelming majority (88%) of UK households have access to a private or shared garden,[15] arguably making gardening fall within the set of creative – yet instrumental – activities of daily living along with cooking.

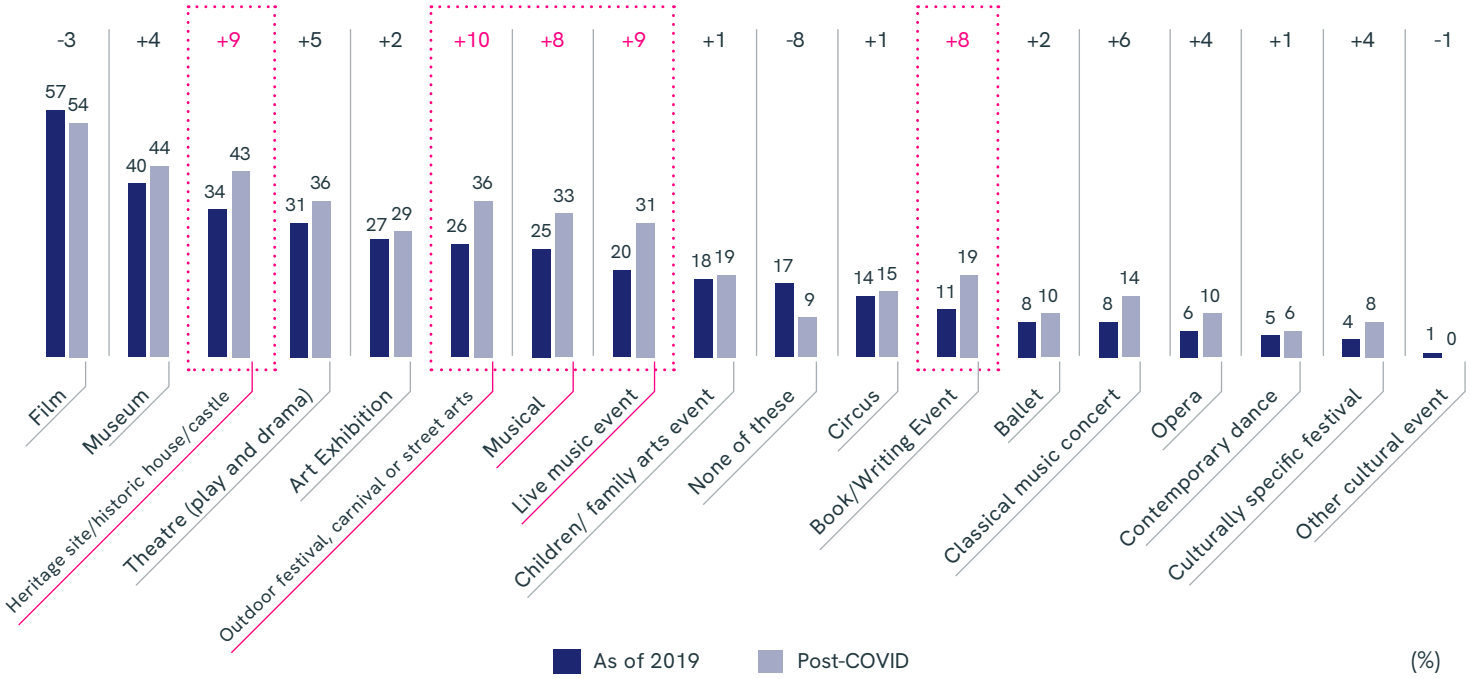
[15] Office for National Statistics (ONS). (2020). One in eight British households has no garden. https://www.ons.gov.uk/economy/environmentalaccounts/articles/oneineightbritishhouseholdshasnogarden/2020-05-14

2.2.2. Attendance of culture and the arts

With 57% of people saying that they visited a cinema (or another venue) to watch a film at least once since 2019, cinema is the most popular cultural/artistic venue. This is followed by museums (40%), heritage sites (34%) and theatres (31%) and generally corresponds with the four most popular venues attended by the participants during childhood (see Figure 5). Meanwhile, ballet (8%), classical music concerts (8%), opera (6%), contemporary dance (5%) and culturally specific festivals (4%) represent the least attended cultural forms. 17% said they attended none of the tested venues/activities. These findings generally agree with those derived from the Taking Part Survey.[16]

As evident from Figure 9, 37% of English adults are still hesitant to visit cultural venues due to the risk of contracting the COVID-19 virus. If COVID-19 was no longer an issue, a majority of the public (54%) would still favour attending the cinema over other venues/activities that we tested, but this is lower than the existing level of attendance (57%) (see Figure 8). Yet, attendance of live music events, outdoor festivals/carnival/street arts and musicals, heritage sites and museums, is likely to rise.

Figure 8. Attendance comparison



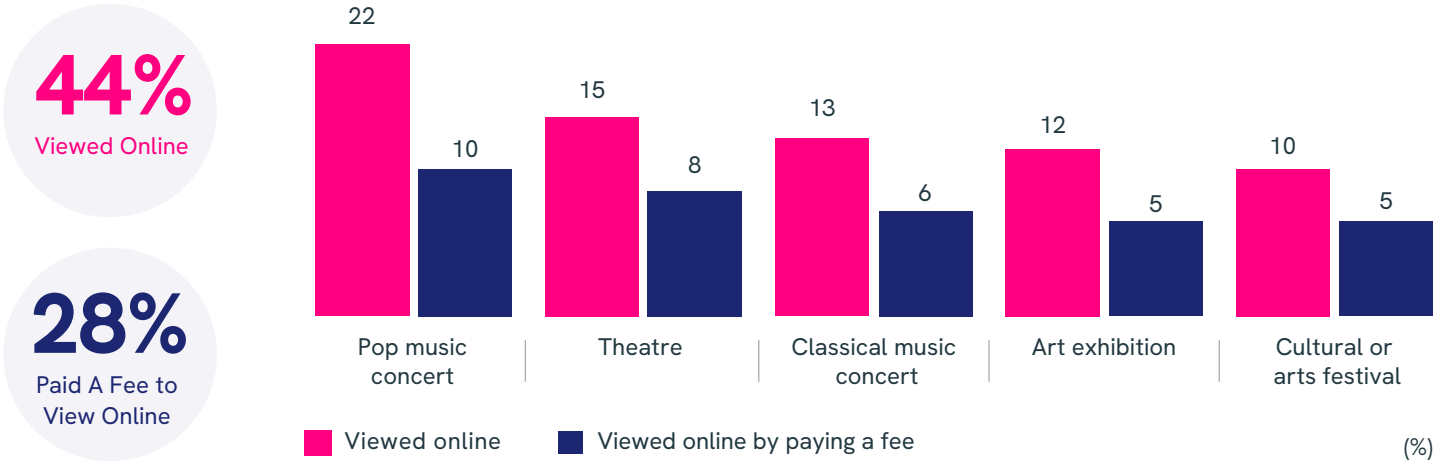
Q6. As of 2019, which of the following have you attended/visited at least once? Q9. If Covid-19 were no longer present or caused no risk at all, which of the following would you like to visit/attend in person in the coming 12 months? Base: All respondents: (n=2123)

[16] See Brook, O., O'Brien, D., & Taylor, M. (2020). Culture is bad for you. Manchester University Press.

2.2.3. Online attendance and the impact of COVID-19

Since the onset of the COVID-19 pandemic, the public (in the UK and beyond) has consumed record amounts of mediated content such as TV, film and digital gaming, with video streaming and gaming platforms reporting sharp increases in user counts.[17,18,19,20] Meanwhile, we found that less than half of the English population engaged with some other – more traditional – forms of culture and the arts via the digital medium. We tested five cultural/artistic forms/events (see Figure 9), which traditionally are consumed/attended in person and found that just 44% of English adults viewed at least one of these events online since 2020, with just 28% saying that they paid a fee to do so. 22% said that they had viewed a pop music concert since 2020, making it the most popular event to be attended online among those we surveyed. The online viewership drops for those concerts that charge a fee, with only 10% saying that since 2020 they viewed a classical music concert online that required buying a ticket. The figure below shows that the same dynamics stand for the rest of the tested events, meaning that free events generate larger viewership.

Figure 9. Events viewed and paid for online



Q13. Since 2020, have you ever viewed any of the following cultural and arts events? Base: All respondents: (n=2123) Q14. Since 2020, have you viewed any of the following by paying a fee(s) or buying a ticket(s)? Base: All respondents: (n=2123)

[17] BBC. (2020). Netflix gets 16 million new sign-ups thanks to lockdown. https://www.bbc.co.uk/news/business-52376022

[18] BBC. (2020b). TV watching and online streaming surge during lockdown. https://www.bbc.co.uk/news/entertainment-arts-53637305

[19] Sweney, M. (2020). Disney's Netflix rival doubles subscriptions in Covid-19 lockdown. The Guardian. https://www.theguardian.com/media/2020/apr/09/disney-netflix-rival-doubles-subscriptions-in-virus-lockdown

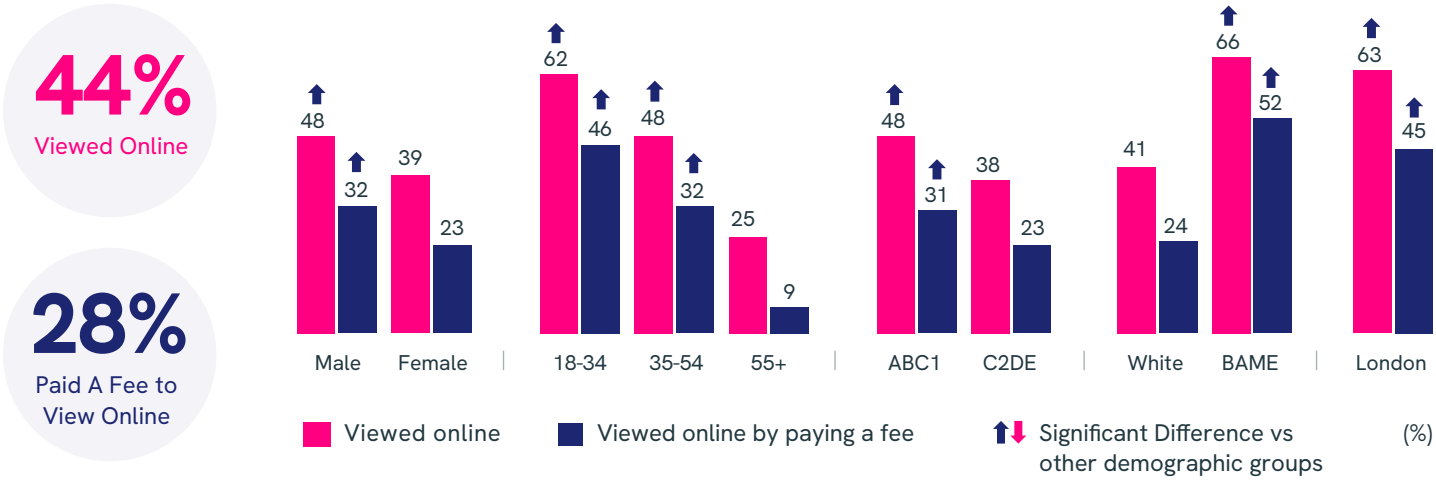
[20] Smith, N. (2020). Video game industry giants have thrived in the covid-19 pandemic. Will the surge continue? The Washington Post. https://www.washingtonpost.com/video-games/2020/05/12/video-game-industry-coronavirus/

While it is not particularly surprising that the public prefers to attend online events that are free of charge, this finding does foreground an important issue that artists and cultural organisations have been faced with since the beginning of the pandemic. Many cultural and arts organisations switched to the digital sphere, offering the public a wide range of virtual performances, including live and pre-recorded/archived concerts.[21] Initially, much of this virtual content was offered for free, in turn, triggering concerns with regard to the (de)valuation of arts performances and artists' labour, as well as activating discussions on how to integrate digital offers into sustainable business models of cultural and arts organisations.

Cross-variable analysis of our data (summarised in Figure 10) offers some insight that could potentially help develop such models. For instance, we found that viewership of both free and paid events is stronger among the younger population. Only 25% of those over 55 years old reported viewing at least one of the tested events online; this went down to 9% for events subject to a fee. Among those under 35, these figures rise to 62% and 46% respectively, signifying that the viewership of cultural/artistic events online is likely to be a long-term upward trend. Viewership of free and paid events is also stronger among those with a higher social grade (ABC1) and those who reside in London. Less predictably, men – who attend cultural events/venues as much as women – are more predisposed to viewing (and paying for viewing) cultural events online. Finally, ethnic minorities are also significantly more predisposed to viewing (and paying for) cultural events online than the white population (see 3.2 for the discussion on ethnicity).

[21] Royal Opera House. (2020). The Royal Opera House to broadcast series of ballet and opera live performances over November Lockdown. https://www.roh.org.uk/news/the-royal-opera-house-to-broadcast-series-of-ballet-and-opera-live-performances-over-november-lockdown

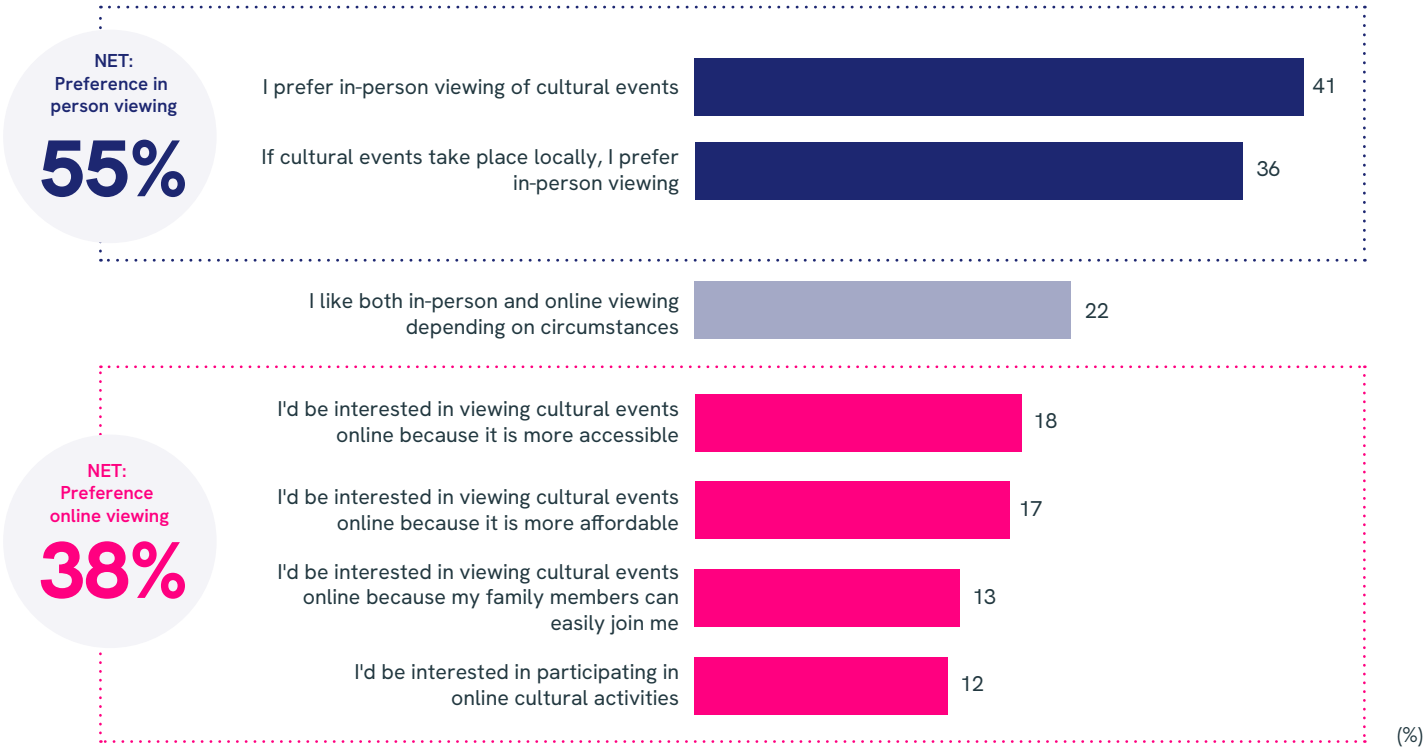
Figure 10. Events viewed and paid for online across different groups



Q13. Since 2020, have you ever viewed any of the following cultural and arts events? Base: All respondents: (n=2123) Q14. Since 2020, have you viewed any of the following by paying a fee(s) or buying a ticket(s)? Base: All respondents: (n=2123)

The preference for in-person viewing is strong among the public (see Figure 11). 41% said that if COVID-19 was no longer an issue, they would prefer in-person viewing of cultural events, and 36% said that they would prefer in-person viewing of cultural events that take place locally. Just 22% are neutral saying that they like both online and in-person viewing depending on the circumstances. Only a minority would be interested in viewing cultural events online because they think it is more accessible (18%), more affordable (17%) and/or can be easily enjoyed together with one's family members (13%). Only 12% say they would be interested in *participating* in online cultural activities.

Figure 11. Preference for viewership of and participation in cultural events



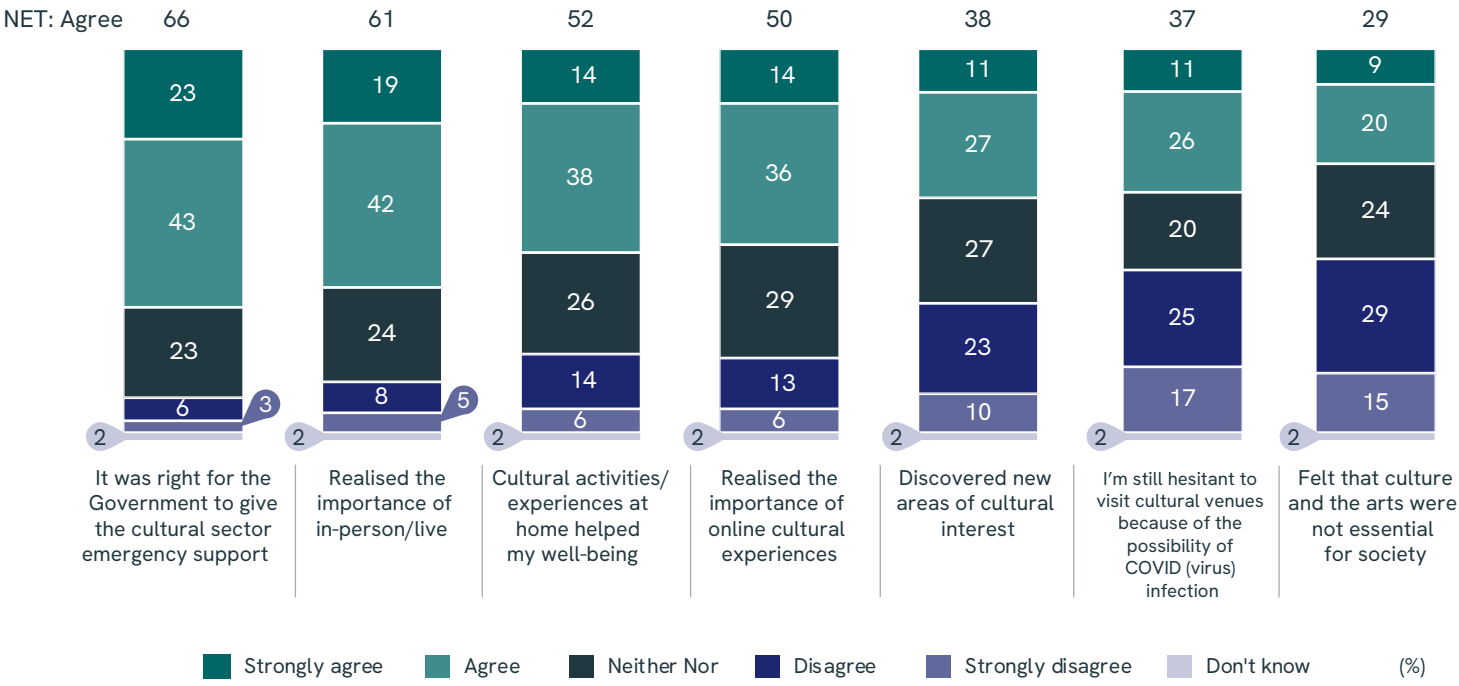
Q15. If Covid-19 were no longer present or caused no risk at all, would you agree with the following statements? Base: All respondents: (n=2123)

The COVID-19 pandemic heightened the importance of in-person/live events

Half of the survey participants (50%) agreed that the COVID-19 pandemic made them realise the importance of online cultural experiences. Meanwhile, 61% realised the importance of in-person/live cultural experiences during the pandemic (see Figure 9). With 52% agreeing that cultural activities/experiences at home helped their well-being during the pandemic, there is little consensus on the matter among English adults. Over 55s were less likely to agree that cultural/artistic activities/experiences helped their well-being (40%) compared to the average (52%) or under 45s (62%). This is noteworthy, given that many initiatives to support the public's health and well-being through creativity, culture and the arts during (but also before and after) the pandemic were (and are) designed specifically for older adults.[22] Potentially the lower perception of culture's contribution to well-being among older participants during the time of COVID-19 could be, at least partially, explained by the lower levels of digital engagement among this demographic group (discussed above).

[22] Culture, Health & Wellbeing Alliance. (2021). How culture and creativity have been supporting people in health, care and other institutions during the Covid-19 pandemic. https://www.culturehealthandwellbeing.org.uk/sites/default/files/Culture%2C%20Health%20%26%20Wellbeing%20Alliance%2Institutions%20report%20-%20FINAL.pdf

Figure 12. The impacts of COVID-19 on the public's attitudes to culture and the arts



Q12. Reflecting on the last two years of the pandemic, how much do you agree with the following statements? Base: All respondents (n=2123)

Reflecting on the last two years, about 29% of respondents felt that culture and the arts were not essential for society. Finally, despite numerous news stories covering various creative hobbies that members of the public picked up during COVID-19 lockdowns to keep themselves busy and stimulated[23,24,25] a minority – 38% – of English adults reported having discovered new areas of cultural interest throughout the pandemic. Notably, ethnic minorities are – at least by 10% – more likely to agree with the tested statements presented in Figure 12 above (see section 3.2 for further discussion on ethnicity).

[23] BBC. (2021). Covid: Newport and Merthyr Tydfil projects showcase lockdown arts and crafts. https://www.bbc.co.uk/news/uk-wales-57212606

[24] BBC. (2021). How pandemic burnout sparked a knitting revival. https://www.bbc.co.uk/news/business-59291962

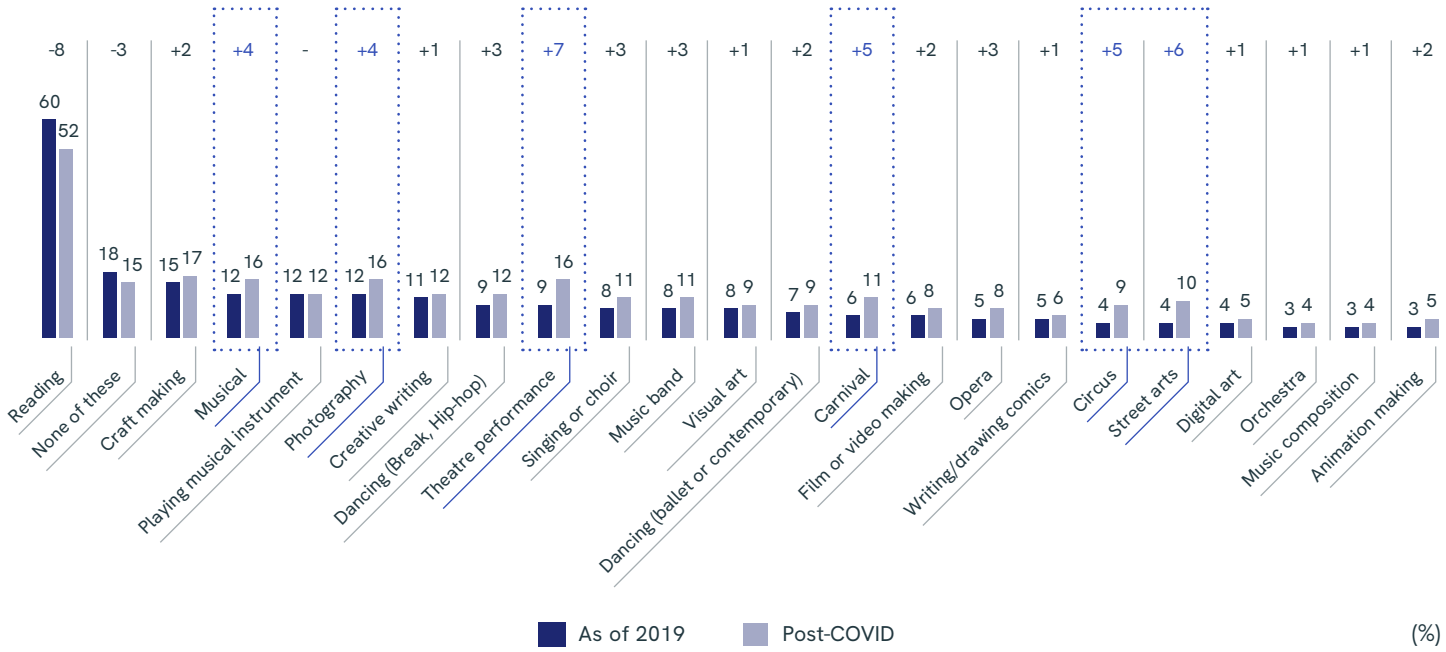
[25] Hill, A. (2020). "It's reawakened something": creative ambitions blossom for lockdown 2. The Guardian. https://www.theguardian.comworld/2020/nov/07/its-reawakened-something-creative-ambitions-blossom-for-lockdown-2

2.2.4. Participation in culture and the arts

Reading, by far, is the most common activity for the public to participate in, with 60% saying that they have participated in reading since 2019 (see Figure 13). Participation in other types of cultural/artistic activities is significantly lower. For example, the second most common activity – craft making – is reported by only 15% of the public. 18% of the participants said they had not participated in any of the activities.

Although the levels of reading are likely to drop slightly within the next 12 months, reading would remain the most common activity for the public to participate in. The levels of participation across other – less homebound – activities are likely to rise – albeit slightly. Participation could increase most for theatre performance, street arts, carnival and circus.

Figure 13. Participation in cultural/artistic activities



Q7. As of 2019, which of the following activities have you participated in? Q10. If Covid-19 were no longer present or caused no risk at all, which among the following activities would you like to participate in? Base: All respondents: (n=2123)

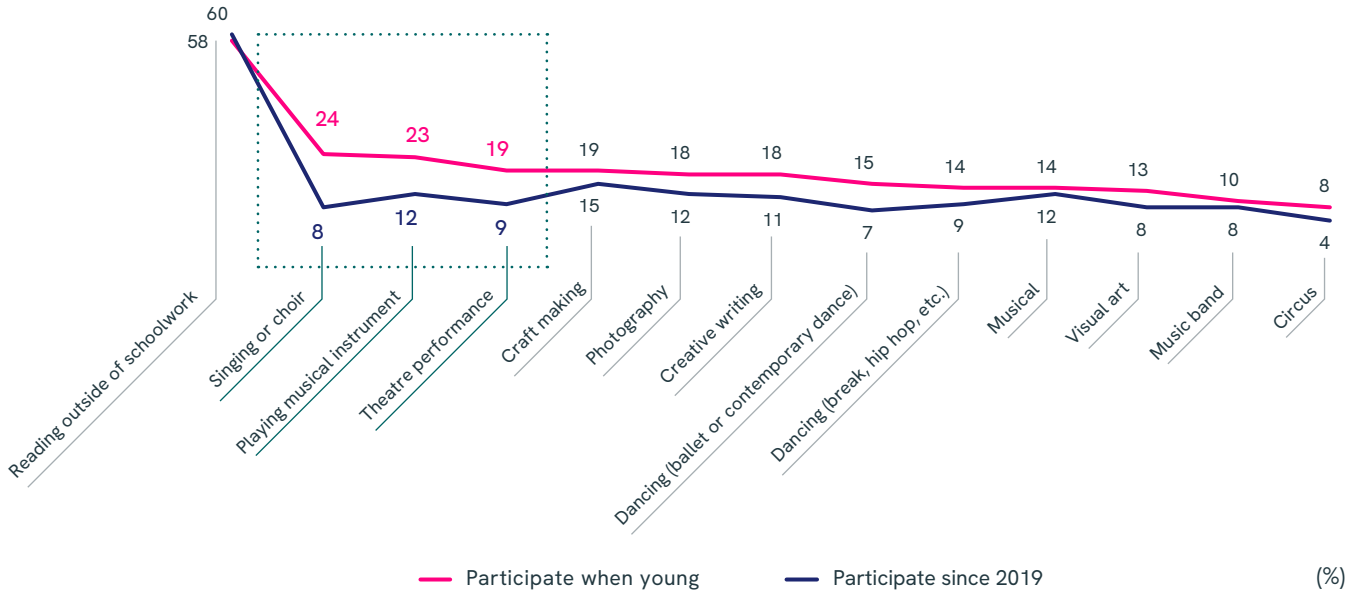
Participation is slightly stronger among women, with 85% of women and 80% of men reporting participating in at least one of the activities tested/suggested since 2019. The same dynamics stand for participation during childhood, with 92% of women and 85% of men reporting participating (in at least one of the tested activities) during their childhood and school years up to the age of 16. It is also interesting to note that while women, as of 2019, are more likely to participate in reading (69%) and craft-making (19%) than men (51% and 10%, respectively), men are more likely to play a musical instrument (16%) or participate in a musical (14%) than women (8% and 9% respectively).

Participation seems to also vary with age, as younger members of the public are more likely to participate both since 2019 and during childhood. For example, as of 2019, 91% of those under 35 participated in at least one of the tested activities. This reduces to 76% among those over 55 years old. A similar trend applies to the levels of interest in the arts (as discussed in 2.1.2). It is noteworthy that younger members of the public are less likely to participate in reading when compared to their older counterparts. 68% of those over 55 years old reported reading (outside of schoolwork) since 2019; this drops to 51% for those under 35 years old.

It is noteworthy that childhood interests (discussed in 2.1.3) do not always correspond with adulthood participation (Figure 13), with the widest gaps spotted for performing arts such as singing/choir, playing musical instruments, participating in a music band, theatre performance or a musical, meaning that more people were interested in these activities as children compared to how many participated as adults.

Furthermore, generally, people seem to participate in cultural/artistic activities more during childhood than adulthood (except for reading), with singing/choir, playing a musical instrument and participating in a theatre performance having the largest drop in participation into adulthood (see Figure 14).

Figure 14. Participation comparison between childhood and today



Q5. During your childhood and school years up to age 16, had you ever participated in any of the following activities? Q7. As of 2019, which of the following activities have you participated in?
Base: All Respondents (n=2123)

2.2.5. How does the public prefer to participate in/access culture and the arts?

One can participate in culture and the arts in different ways. Understanding the preferred ways is crucial for cultural managers to develop successful methods of engagement, depending on artform and audience profile.[26] This is also important for policymakers who are concerned with the effective redistribution of public funding, to widen public cultural participation across different communities and groups.[27,28,29]

Homebound engagement is preferred across several art forms (see Figure 15). For instance, visual art, digital art, photography, film/video and animation making are typically practiced at home. However, posting content on social media is also a popular form of participation for these activities. While creative writing and writing/drawing are also typically practised at home (67% and 51% respectively), the preferred form of participation for singing is performance (46%), often as a club member (44%). A more detailed analysis of each form of participation is available in Appendix 2.

Figure 15. Most common participation method by activity

This is the most popular method, with

49%

of those who participate in activities will be doing so at home

Q11. If Covid-19 were no longer present or caused no risk at all, how would you like to participate in your chosen activities?

[26] McCarthy, K.F. & Jinnett, K.J. (2001). A New Framework for Building Participation in the Arts. RAND Corporation. https://www.rand.org/pubs/monograph_reports/MR1323.html

[27] OMC. (2012). Policies and good practices in the public arts and in cultural institutions to promote better access to and wider participation in culture. Brussels: European Commission.

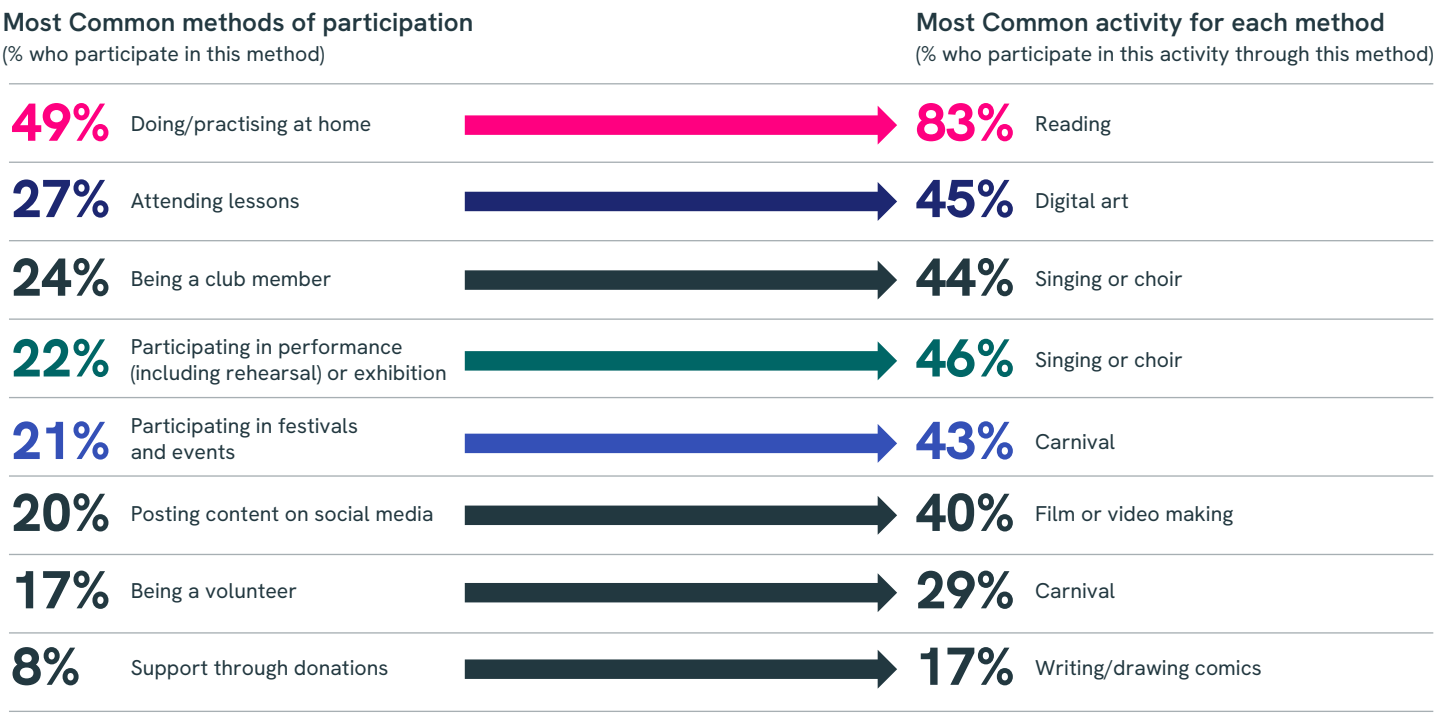
[28] Americans For the Arts. (2019). Participation in Arts and Culture: The Importance of Community Venues, Americans for the Arts. https://www.americansforthearts.org/by-program/reports-and-data/legislation-policy/naappd/participation-in-arts-and-culture-the-importance-of-community-venues-0

[29] Bonet, L., & Négrier, E. (2018). The participative turn in cultural policy: Paradigms, models, contexts. Poetics, 66, 64–73. https://doi.org/10.1016/J.POETIC.2018.02.006

As seen in Figure 16, even if Covid-19 were no longer present or caused no risk at all, the most common form of participation by a significant margin was doing/practising at home, with almost half of the public choosing this form (49%). The next popular method is attending lessons, with 27% of people choosing this. This form is particularly popular for participating in digital art.

Both being a club member and participating in a performance or exhibition are the forms of participation chosen by just under a quarter of people (24% and 22% respectively), both having singing or choir as the most popular activity for these forms of participation. The least popular forms of engagement include posting content on social media, volunteering, and donating.

Figure 16. Most common methods of participation and most common activity for each method

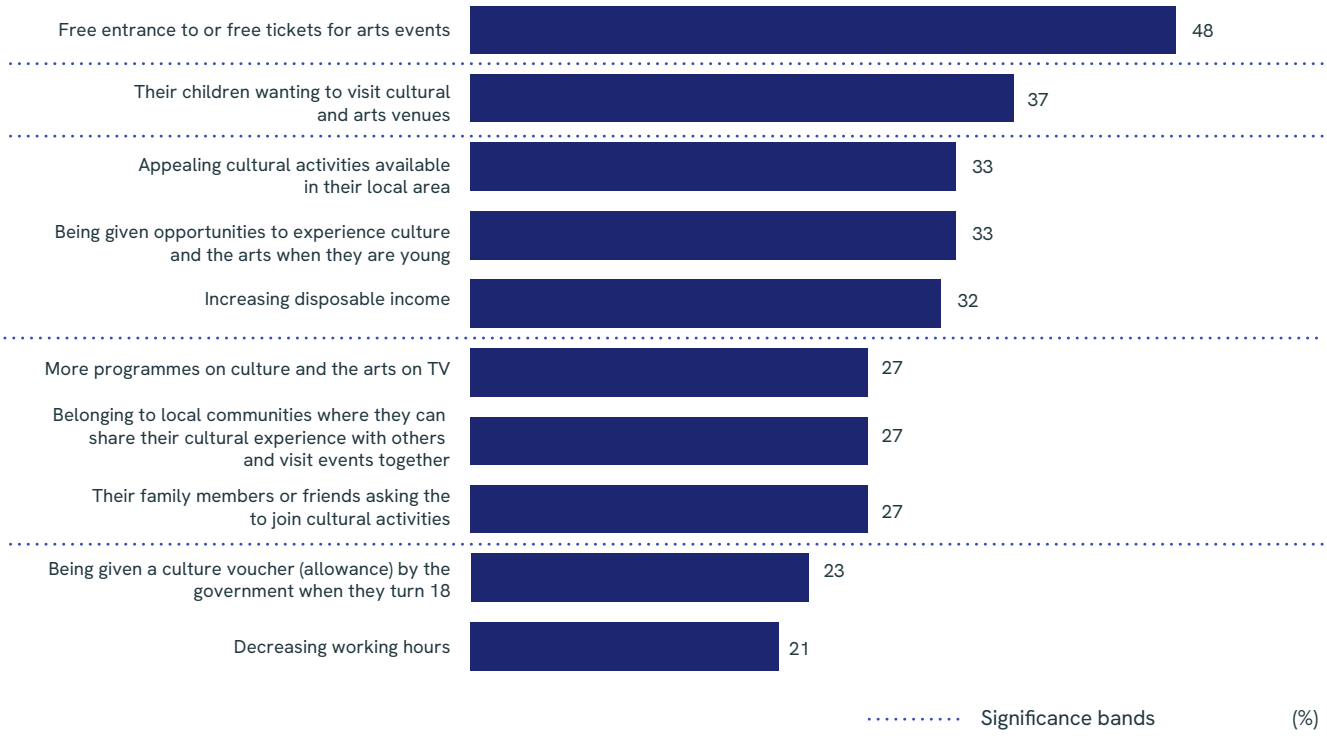


Q11. If Covid-19 were no longer present or caused no risk at all, how would you like to participate in your chosen activities?

2.2.6. Some ways to improve participation

Nearly half of the people surveyed believe that free entrance or free tickets for arts events would increase cultural participation (48%) (see Figure 17). The significance of children as a driver, however, cannot be ignored, with 37% of people stating that they think their children wanting to visit cultural and arts venues would increase their visitation. This highlights the role of children as gatekeepers for cultural participation in adults as well as suggests that getting children interested and engaged in culture and the arts will not only create more participation in the future (as children become adults) but also in the present, through the indirect engagement of their parents. Having activities in the local area, opportunities to experience culture and arts in their youth and increasing disposable income were all noted by 1 in 3 people. Interestingly, only 21% agreed that decreasing working hours would increase cultural participation.

Figure 17. How to increase cultural participation

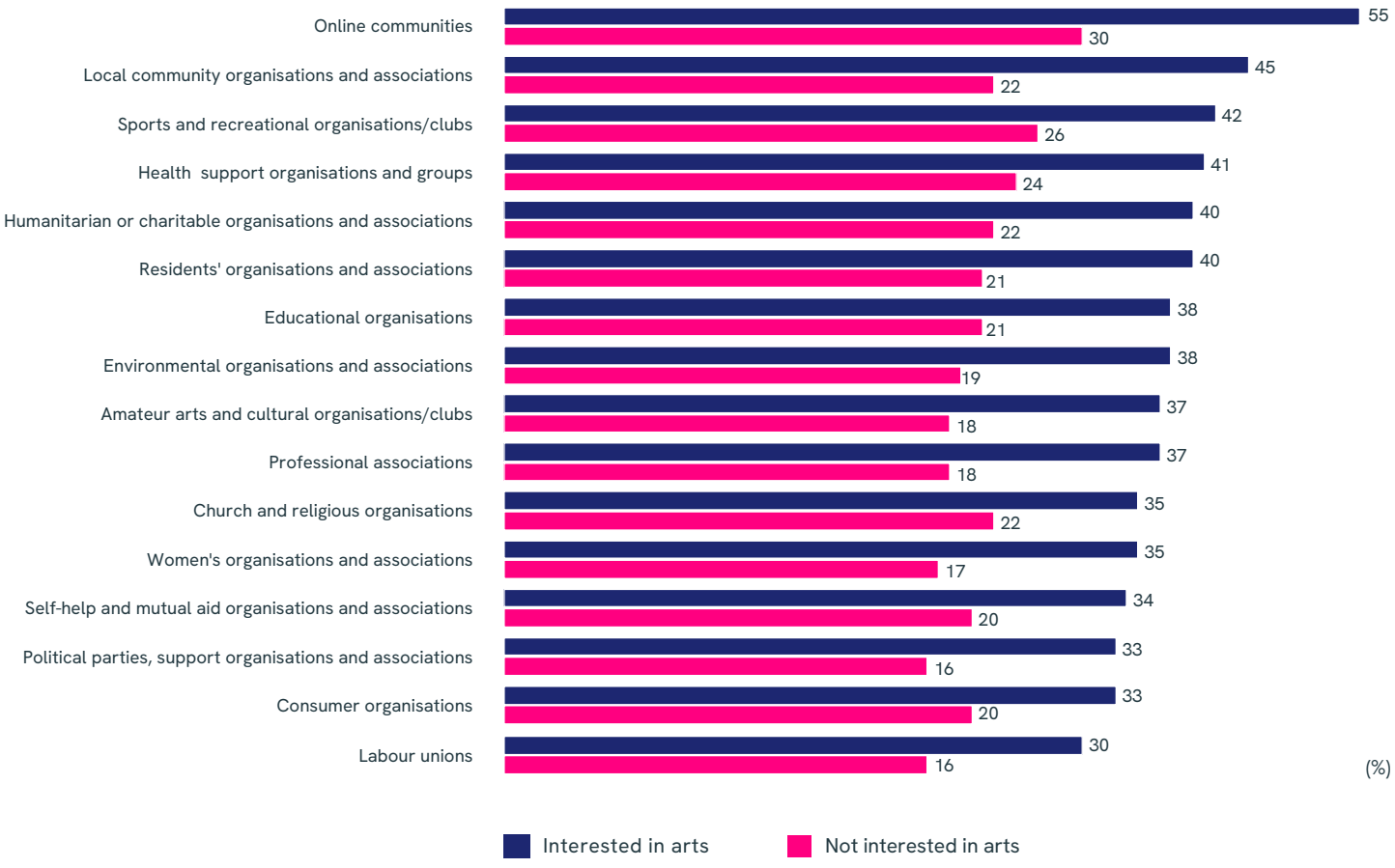


Q35. In which of the following scenarios, do you think people would increase their cultural participation? Base: All respondents: (n=2123)

2.2.7. Participation in social organisations/activities

It is also interesting to reflect on how much the English public is involved with various social organisations and activities. Currently, on average people are most involved with online communities (44%), sports organisations (35%), local community and health support organisations (35% and 34% respectively). But 28% of the surveyed people are not involved in any of the tested options. This goes up to 42% among those not interested in the arts, indicating that interest in the arts is not an isolated phenomenon and is closely correlated with one's overall levels of social participation. The data summarised in figure 18 below spotlights this link very clearly. From this figure, we can see that those interested in the arts are significantly more likely to participate in social organisations and activities tested ranging from online communities to labour unions.

Figure 18. Involvement with social organisations/activities by interest in the arts



Q36. How much involved are you in the following organisations and activities? Base: All respondents: (n=2123) Interested in arts (1211) Not interested in arts (869)

2.2.8. Satisfaction, engagement and interest in culture and the arts locally

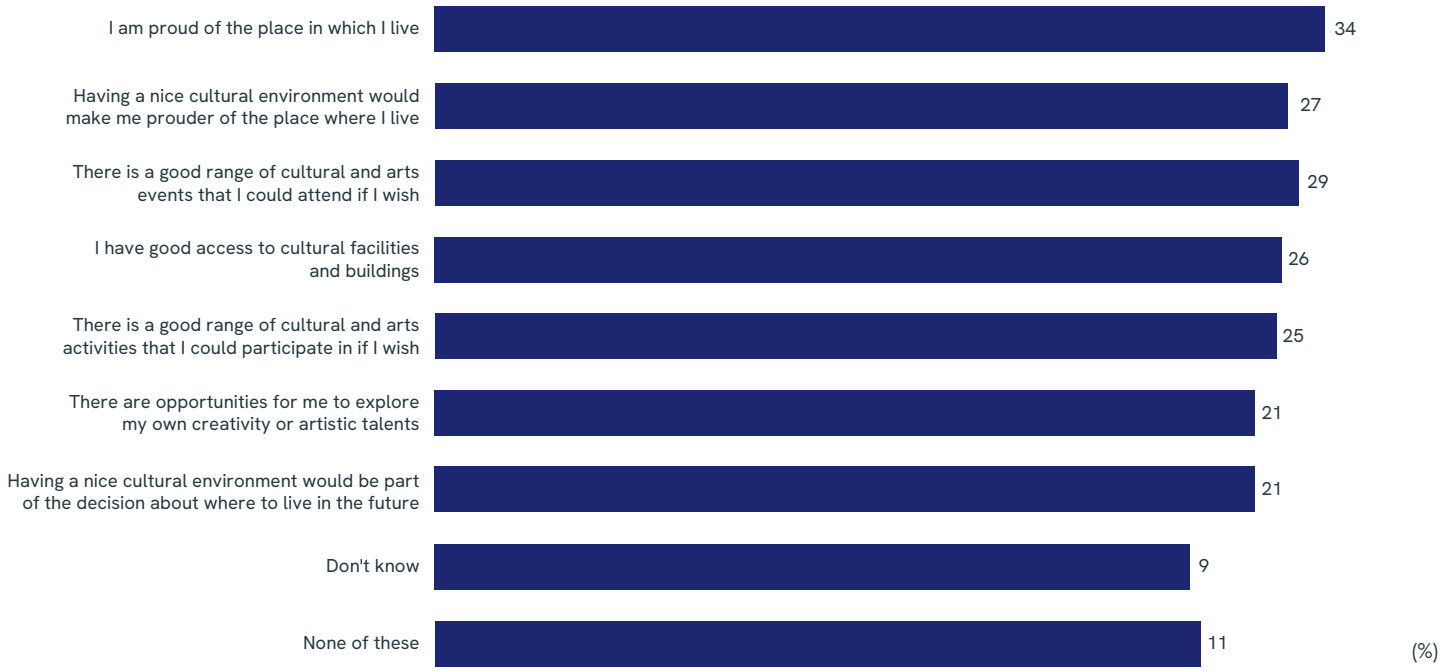
With only 29% saying that there is a good range of cultural and arts events to attend locally, the English public does not appear particularly satisfied with the state of cultural provision in their local areas (See Figure 19). Furthermore, only a quarter says that they have good access to cultural facilities and buildings (26%) or that there is a good range of cultural and arts activities (25%) that one could participate in if desired. Similarly, only 21% of people feel that there are opportunities to explore their creativity and artistic talents locally.

Furthermore, only a minority (34%) are proud of the place they live in. The levels of pride, however, should not be equated with the levels of satisfaction. It is because, according to the English Housing Survey in 2019-20, a majority (87%) of the English public feel satisfied with the areas where they live.[30] With only 27% of people saying that having a nice cultural environment would make them prouder of the place where they live, our findings suggest that the state of the local cultural environment is not a major factor that impacts pride in one's local area. This, however, seems to contradict some of the existing findings made by BOP Consulting[31] for the Arts Council England only a year ago. Looking across the UK more widely, this study on the impact of culture on the high street found that '62% of UK adults agree that cultural experiences on the high street give them a sense of pride about their local area'. Meanwhile, our findings suggest that a vibrant cultural life locally does not seem to be a significant factor for the public when choosing a place to live, with only 21% saying that having a nice cultural environment would be a part of the decision about where to live in the future.

[30] Ministry of Housing, Communities and Local Government. (2020). English Housing Survey: Headline Report, 2019-20. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/945013/2019-20_EHS_HeadlineReport.pdf

[31] BOP Consulting. (2021). A High Street Renaissance: How arts and culture bring people and pride back to our high streets. https://www.artscouncil.org.uk/high-street-renaissance

Figure 19. Attitudes towards local cultural environment



Q28. About your local area, do you agree with the following statements? Base: All respondents: (n=2123)

Londoners (with 37% saying so) are significantly more likely to believe that they have a good range of cultural/artistic events to attend, especially when compared to residents of the East Midlands (22%) as well as Yorkshire & Humberside (23%). Londoners (30%) are also more likely to admit they have opportunities to explore their creativity or artistic talent, again, especially when compared to Yorkshire & Humberside residents (14%). The same trend applies for cultural/artistic activities one could participate in: Londoners (30%) are more likely to have access to a good range of activities to participate in, while Yorkshire & Humberside residents (20%) are the least likely. Regarding access to cultural facilities and buildings, similar portions of Yorkshire & Humberside and London residents (28% and 29%) believe they have good access. Yorkshire & Humberside residents are likelier to say that having a nice cultural environment would make them prouder of where they live. These findings could be of interest to policymakers who are currently engaged in levelling up funding across the regions in the UK.[32]

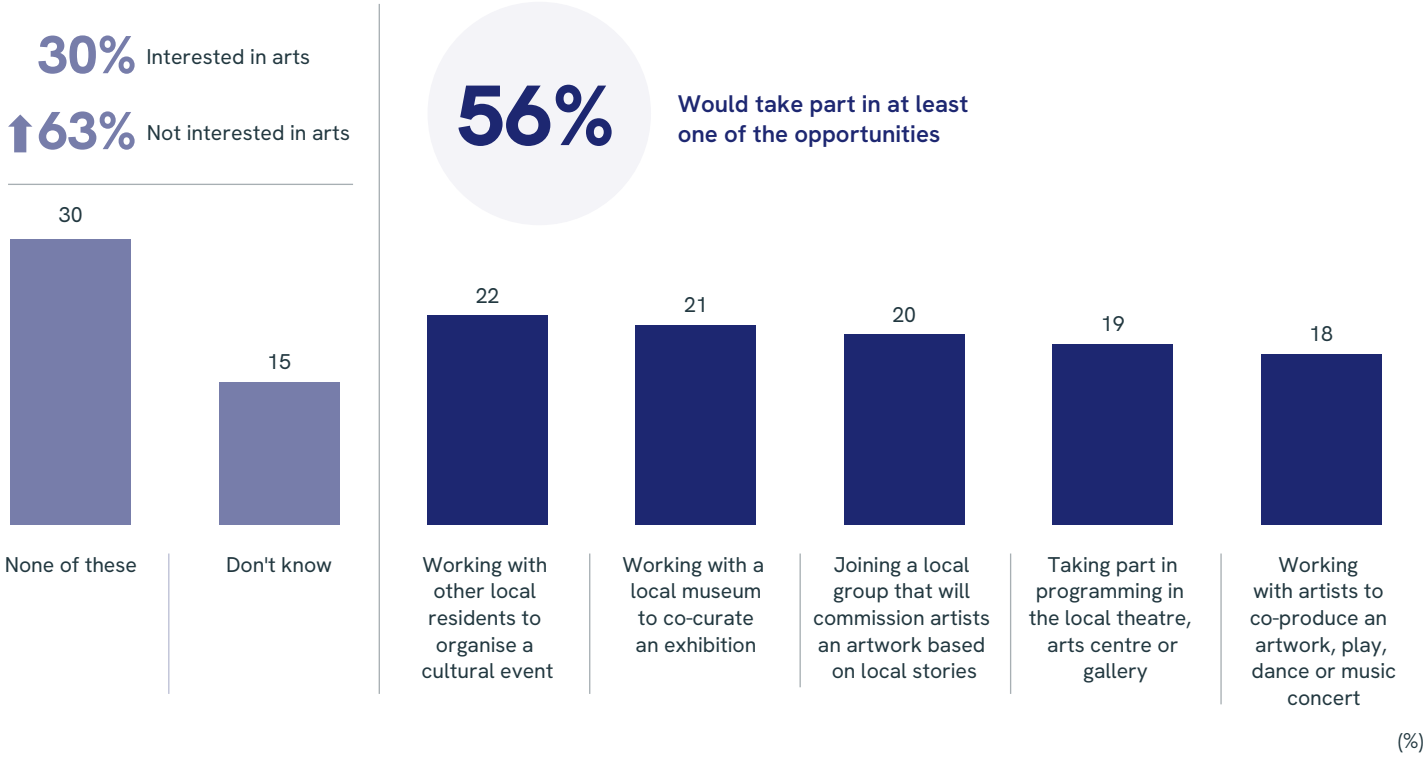
[32] BBC. (2022). English National Opera to leave London as arts funding gets levelled up. https://www.bbc.co.uk/news/entertainment-arts-63512050

The English public displays relatively low levels of interest in getting involved with local cultural/artistic events. The appeal of the tested opportunities (7 in total) appears to be equally weak, with each option attracting only about 20% of the public. Almost half of the public (45%) are either not sure (15%) or unequivocally not interested (30%) in any of the options tested (see Figure 20). Notably, this 45% rises to 63% among those who are not interested in the arts.

The above findings have important implications for policymakers who are keen to develop strategies for cultural democracy that can encourage everyone to take an active role in the cultural life around them, and for local cultural organisations that try to involve members of local communities as co-creators. How can they engage those who express no interest?

Our data, summarised in Figure 20 below, highlights that a significant proportion of the English population does not engage with cultural/artistic opportunities locally, not necessarily due to a lack of opportunities to do so but due to the lack of interest or motivation to do so. This adds to the issue of the sticky nature of cultural interest raised in the previous section (see 2.1.2). We would like to highlight the need for further research to generate a more nuanced understanding of people's individual and collective motivations to participate in local cultural opportunities.

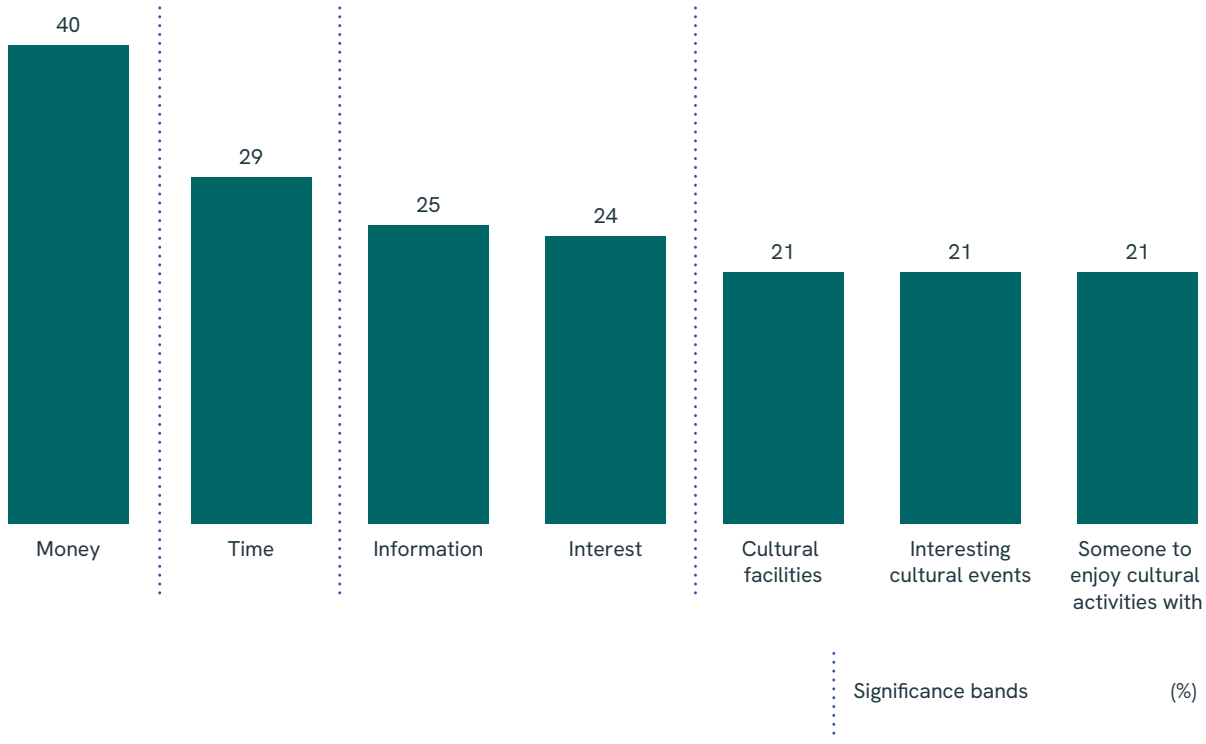
Figure 20. Interest in getting involved with local cultural/artistic opportunities



Q33. Would you be interested in the following opportunities? Base: All respondents: (n=2123)

However, when we directly asked the participants to reflect on what prevents them from engaging more with cultural activities locally, we found that money is the biggest perceived barrier to becoming a more active player within the local cultural life, with 40% saying so (see Figure 21). This is followed by the lack of time (29%), information (25%) and interest (24%). As reported by members of the public themselves, lack of interest acts as a more significant barrier for those who do not attend cultural events, with 37% saying so. In short, the lack of interest and lack of engagement in culture and the arts is correlated with the lack of motivation to become a more proactive player within cultural life that unfolds locally.

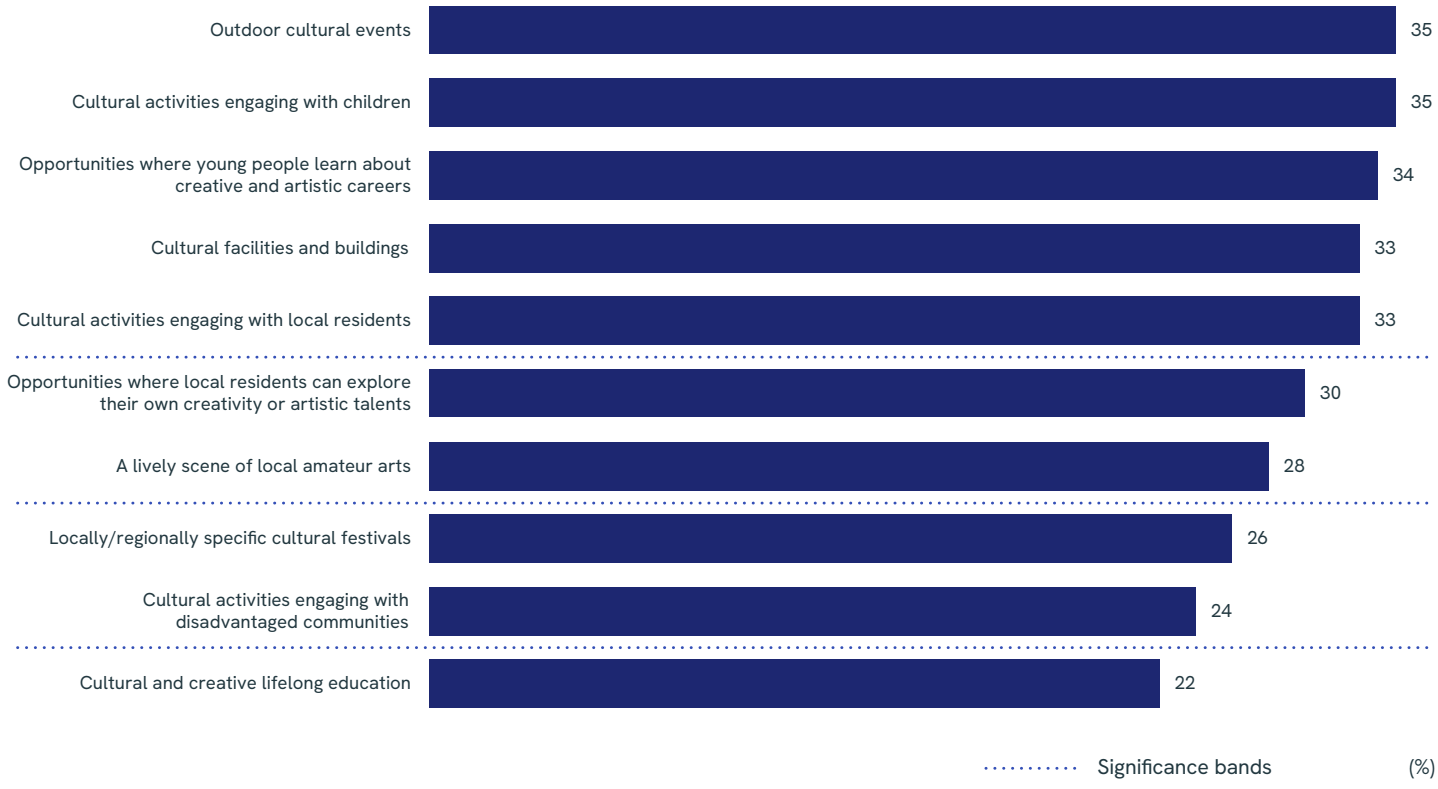
Figure 21. Barriers to cultural engagement in one's local area: the lack of...



Q29. Which of the following prevent you from engaging more in cultural activities in your local area?
Base: All respondents: (n=2123) Those who don't attend cultural activities (n=252)

In terms of improving local cultural environments, the English public does not have one clearly preferred idea. Some of the most popular options are: outdoor events (35%); cultural activities engaging with children (35%); opportunities where young people learn about creative and artistic careers (34%); cultural facilities and buildings (33%); and cultural activities engaging with local residents (24%) (see Figure 22).

Figure 22. Ways to improve local cultural environments

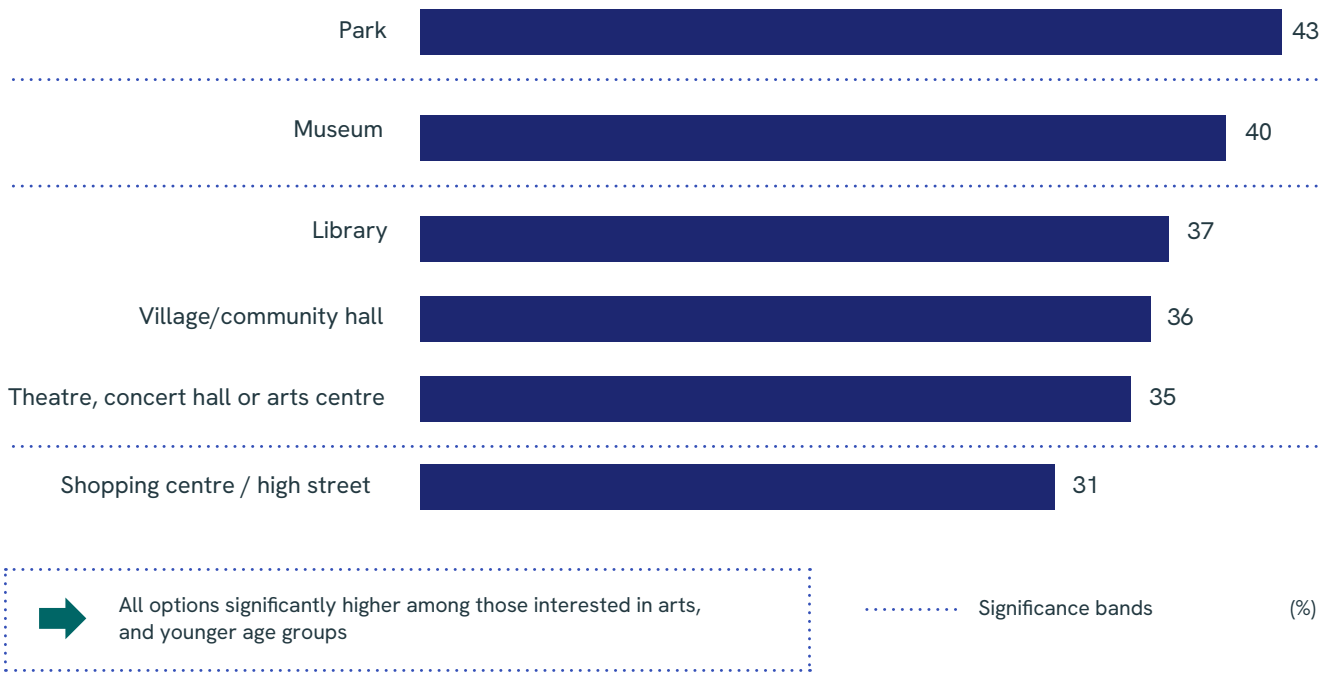


Q30. In your view, which among the following are important for improving the cultural environment of your local community? Base: All respondents: (n=2123)

Opportunities which involve children are of more interest to women than men, with 39% of women saying that this is important for improving local cultural environments compared to 30% of men. Similarly, 37% of women said opportunities for young people to learn about creative and artistic careers are important compared to 30% of men.

We also sought to understand the public preference for venues for participating in local cultural/artistic activities and found that the public is most interested in activities held in local parks and museums (43% and 40%, respectively) (see Figure 23). 31% would be interested in a cultural activity that takes place in a shopping centre or the high street. The existing research done by BOP Consulting for the Arts Council England found that: 'many people want the high streets' presence of culture to expand. Half of the adults (50%) would like to see more cultural experiences on their high streets'.[33] Our findings, however, suggest that this does not mean it will necessarily improve levels of active engagement, as only 3 in 10 English adults would be interested in getting involved.

Figure 23. Interest in local cultural activities by local venues

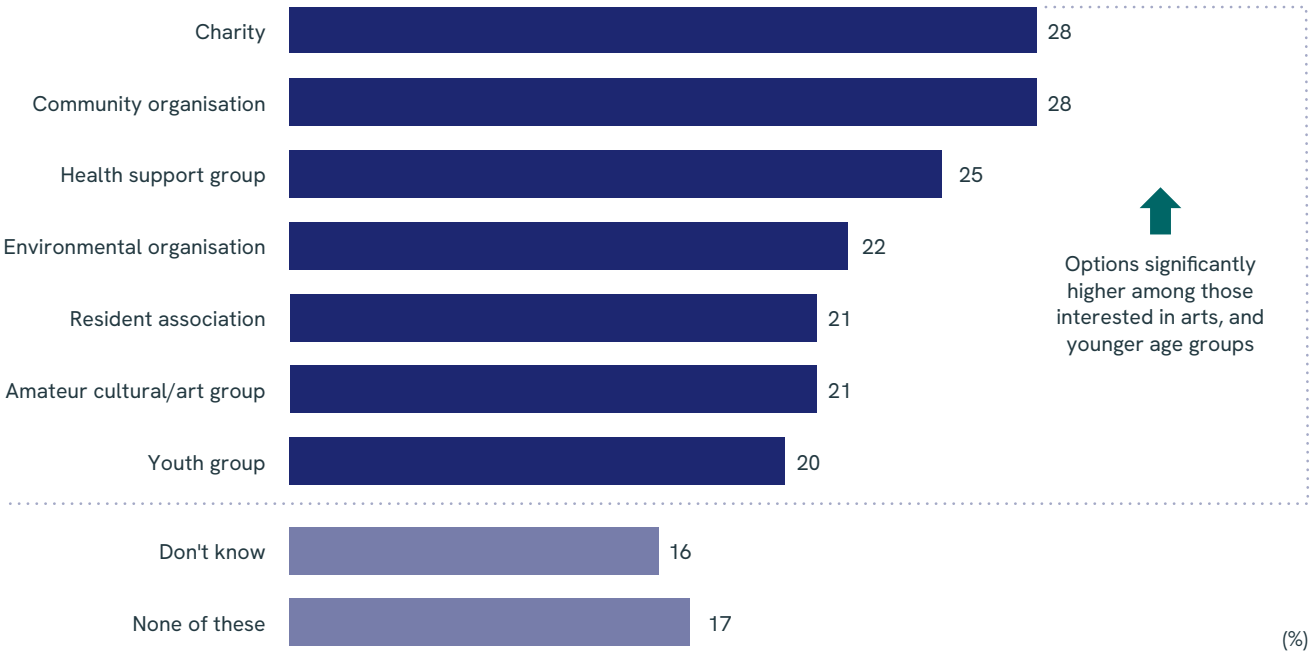


Q31. If cultural activities are held in the following local venues, would you be interested in taking part? Base: All respondents: (n=2123)

[33] BOP Consulting. (2021). A High Street Renaissance: How arts and culture bring people and pride back to our high streets. https://www.artscouncil.org.uk/high-street-renaissance

Finally, we wanted to check whether activities organised by certain types of local organisations would generate more interest among the public. We found that the public would be most interested in getting involved with cultural activities organised by either a charity or community organisation, with nearly 3 in 10 saying so (see Figure 24).

Figure 24. Interest in local cultural activities by local organisations



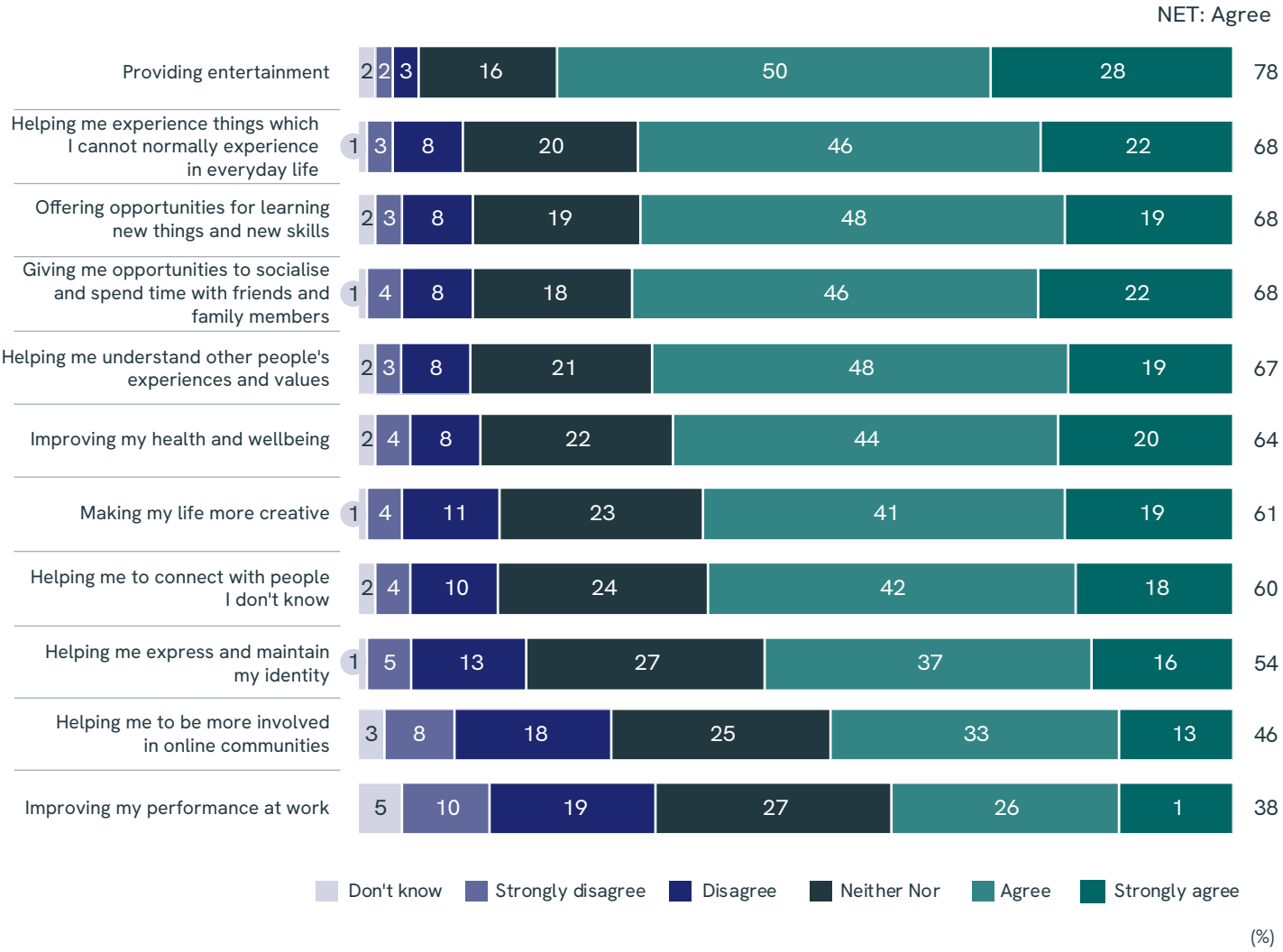
Q32. If any of the following local organisations hold cultural activities, in collaboration with artists, would you be interested in taking part? Base: All respondents: (n=2123)

2.3. Outlook on cultural policy

2.3.1. Culture and the arts have multiple values for the public

Across individual, social and community lives, the English public believes that culture and the arts make a wide range of contributions. For individual lives, the most reported role/contribution of culture and the arts is entertainment (78%) (see Figure 25). Other important roles/contributions with regard to individual lives included: offering a source of new experiences (68%); opportunities to develop new skills (68%); as well as opportunities to socialise with family and friends (68%). Notably, the majority of the public clearly agrees with most of the roles/contributions tested by the survey (9 out of 11). Over half (54%) agreed with the statement that culture and the arts are 'Helping me express and maintain my identity'. Fewer agreed with the remaining two roles/contributions of culture and the arts: 'Helping me to be more involved in online communities' (46%) and 'Improving my performance at work' (38%).

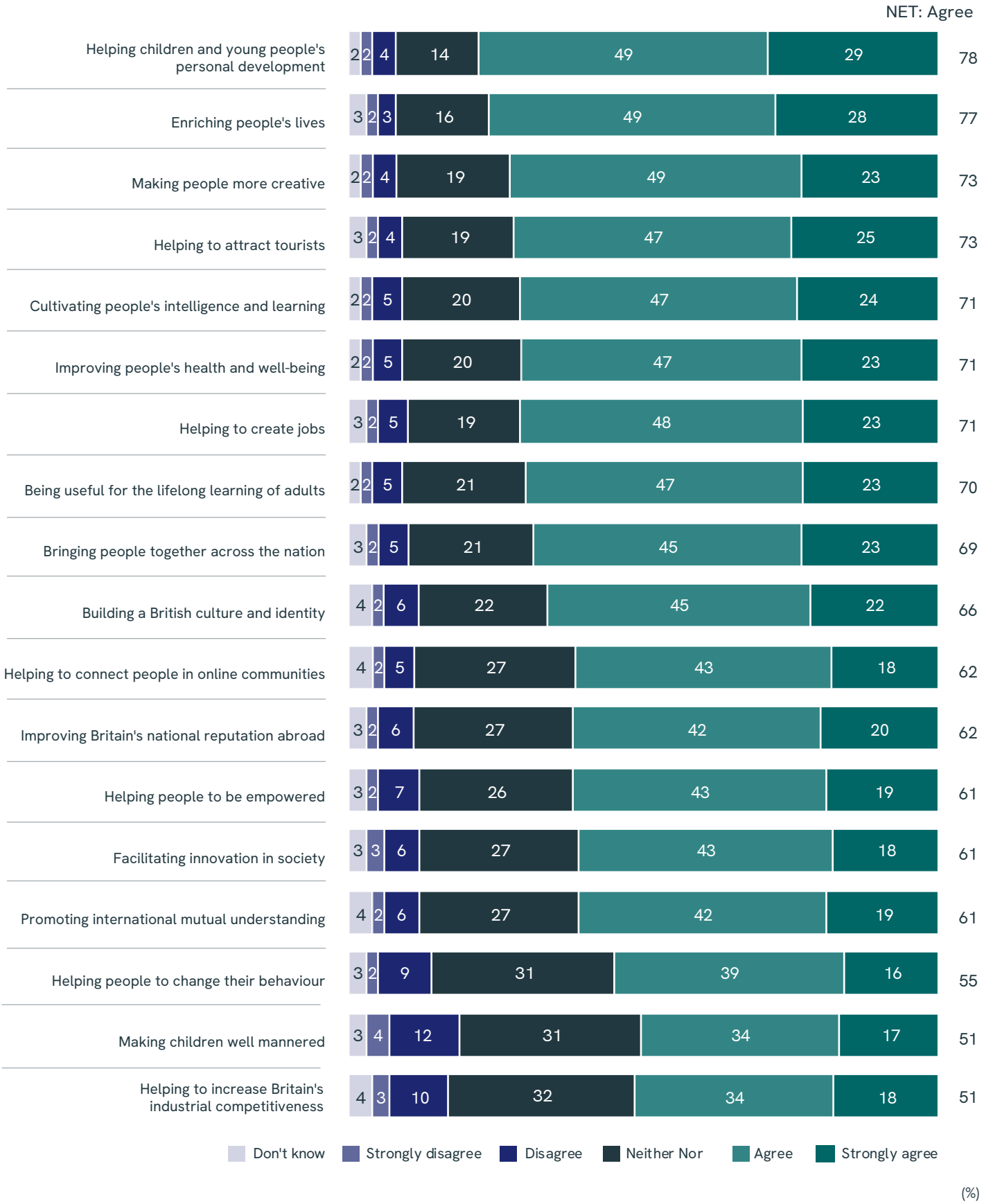
Figure 25. Roles and contributions of culture and the arts within individual lives



Q17. Thinking about your own life, how much do you agree with the following roles and contributions of culture and the arts? Base: All respondents: (n=2123)

As the scale of the perceived beneficiary expands to the level of the entire society, almost four in five English adults believe that culture and the arts help children and young people's personal development (78%) (see Figure 26). Other popular roles/ contributions included: enriching people's lives (77%), developing creativity in people (73%) and helping attract tourists (73%). In fact, the public generally agree on all the roles/contributions proposed by the survey. The weakest levels of agreement are on culture and the arts' ability to help people change their behaviour (55%) help to increase Britain's industrial competitiveness (51%), and make children well-mannered (51%).

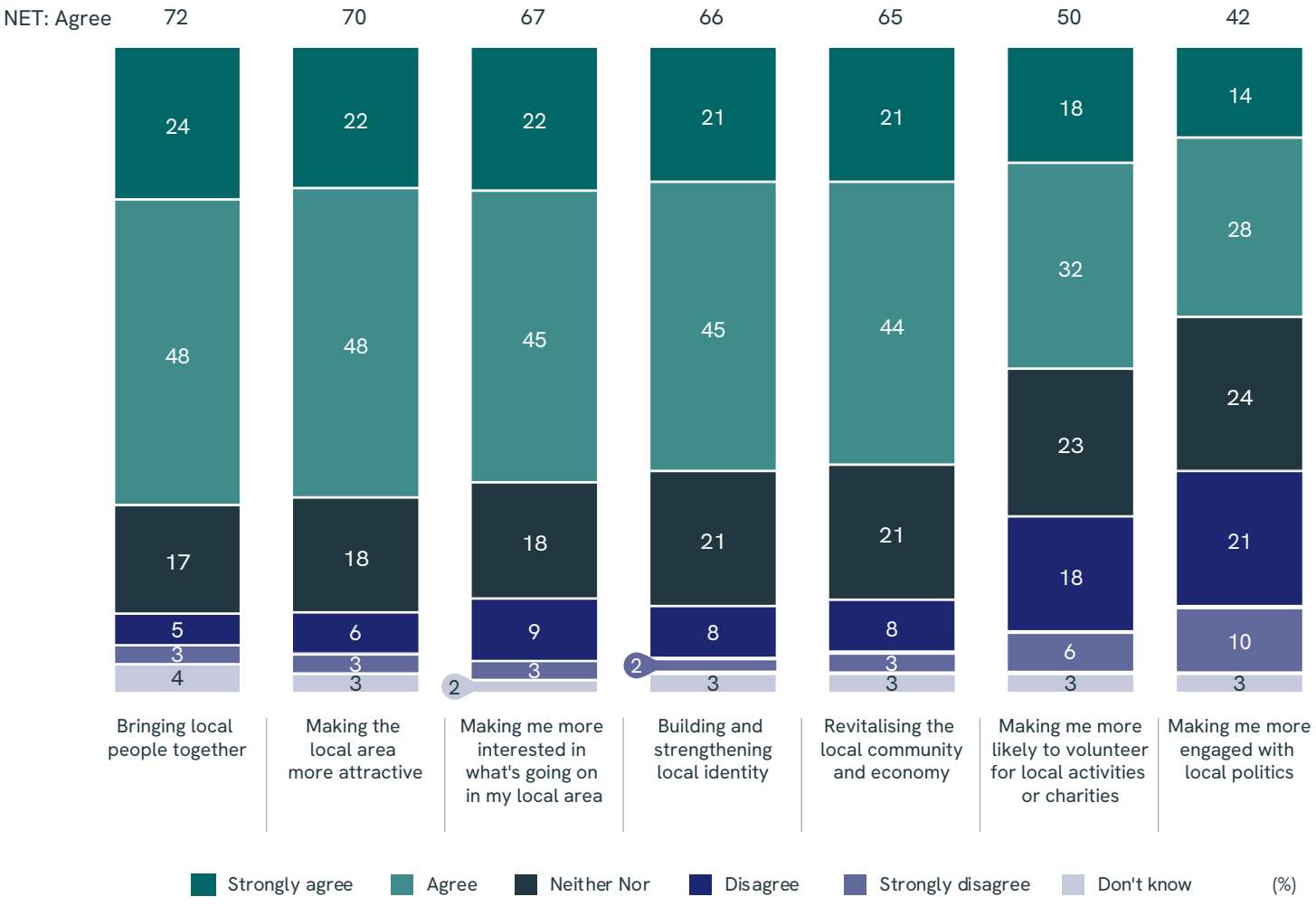
Figure 26. Roles and contributions of culture and the arts within society



Q18. Thinking about society broadly, how much do you agree with the following roles and contributions of culture and the arts? Base: All respondents: (n=2123)

Concerning their local life, people reported 'bringing local people together' as one of the most important roles/contributions culture and the arts can make (72%) (see Figure 27). Again, people agreed on most roles/contributions proposed by the survey (5 out of 7) with 50% of the public agreeing that culture and the arts make them more likely to volunteer for local activities/charities and only 42% agreeing that culture and the arts make them more engaged with local politics.

Figure 27. Roles and contributions of culture and the arts for local life



Q19. Thinking about culture and the arts in your local area, how much do you agree with their following roles and contributions? Base: All respondents: (n=2123)

If considered in conjunction with one another, the three figures above clearly indicate that the English public values culture and the arts for their different roles/ contributions. This is a noteworthy finding, especially when considered against the backdrop of the heated and lingering debates over the past 20 years around intrinsic versus the instrumental value of culture. Our findings show that the public does not seem to prioritise intrinsic (personal) values over instrumental ones. Indeed, it is found that those people who agree on the personal values of culture and the arts tend to agree on economic and social values, too. This resonates with more recent studies, which increasingly started to notice that 'audiences tend to discuss their arts experiences in holistic terms, transcending the reductive dichotomy between intrinsic and instrumental value that has long characterised debates into cultural value'.[34]

[34] Walmsley, B. (2019). Audience engagement in the performing arts: A critical analysis. Springer Nature. https://link.springer.com/content/pdf/10.1007/978-3-030-26653-0.pdf

So, is there a consensus on cultural value? It is difficult to proclaim an unequivocal consensus. Although most people agree that culture and the arts are valuable to individuals, local areas and society more broadly, there are some differences between different genders, different social grades, and those with different attitudes to the arts, as shown in figure 28 below. Clearly, those not interested in the arts tend to attribute significantly less value to culture and the arts than those who are interested. For example, 88% of English adults who are interested in the arts value culture and the arts as a source of entertainment, whereas this figure is 65% among those who are not interested. Equally, the latter attribute less value to culture and the arts as a medium that helps understand other people's experiences and values or as a source of new experiences or opportunities to learn new skills (see Figure 28 for percentages).

Figure 28. Recognition of the value in culture and the arts across different groups

SEG

Those within a higher social grade feel that culture and the arts has a stronger role in both their life and within society

Largest differences in values	ABC1	C2DE
Enrich people's lives	81% ↑	73%
Young people's personal development	81% ↑	74%
Provide Entertainment	81% ↑	74%
Help Create Jobs	74% ↑	69%

Gender

Women also feel that culture and the arts has a stronger role and have different priorities

Largest differences in values	Male	Female
Young people's personal development	73%	82% ↑
People's health and wellbeing	65%	76% ↑
Revitalising local community	59%	71% ↑
Involved with online communities	50% ↑	41%

Interest in arts

Personal, local and societal values resonate stronger among those interested in arts

Largest differences in values	Interested	N/ Interested
Providing entertainment	88% ↑	65%
Helps me experience things which I cannot normally experience	81% ↑	51%
Offering opportunities for learning new things and new skills	80% ↑	53%
Helps me understand other people's experiences and values	80% ↑	50%

Q17. Thinking about your own life, how much do you agree with the following roles and contributions of culture and the arts? Q18. Thinking about society broadly, how much do you agree with the following roles and contributions of culture and the arts? Base: All Respondents (n=2123) ABC1 (n=1210) C2DE (n=913) Male (n=1014) Female (n=1098) Interested (n=1211) Not interested (151)

Considering the wealth of research, which aims to empirically demonstrate themultiple benefits of culture and the arts for the health and well-being of individuals,[35,36,37,38] it is interesting to note that those who are not interested in the arts are significantly less likely to agree on such benefits than those who are interested (45% and 80% respectively). While this finding is not particularly surprising, it does raise some further questions: is there a correlation between the levels of interest in the arts and the levels of awareness regarding certain (instrumental) benefits of culture and the arts? Or perhaps, the benefits of culture and the arts towards personal well-being/health are more subjective than the extant research suggests. The latter question adds to a wider concern surrounding the robustness of current research on the social and health impacts of culture.[39] Finally, considering that the public with the higher social grade is more interested in the arts (as discussed in 2.1.2.) as well as sees (and ultimately derives) more value in culture and the arts, what measures are needed in order to ensure that the publicly funded culture and the arts generate value for all, as opposed to primarily for the more privileged groups?

2.3.2. Awareness of and attitude on public subsidies for culture and the arts

Our finding that just 27% of survey respondents know that 'there has been public subsidy for arts and culture in England since the 1940s' suggests that level of awareness of public cultural subsidy among the population is low (see Figure 29). This finding could be compared with the finding in the Arts Council England's survey that 58% of the public *support* public cultural subsidy.[40] This mismatch seems to suggest that the public does not need to be consciously aware or particularly knowledgeable about certain policy issues/matters to be supportive of them. The low levels of awareness captured by our survey, however, could be down to the wording used in the survey. People who are aware of the existence of arts funding today may still have answered 'no' if they did not know that arts subsidy dates to the 1940s.

[35] Bradbury, A., Warran, K., Mak, H. W., & Fancourt, D. (2021). The Role of the Arts during the COVID-19 Pandemic. https://www.artscouncil.org.uk/sites/default/files/download-file/UCL_Role_of_the_Arts_during_COVID_13012022_0.pdf

[36] Fancourt, D., Warran, K., & Aughterson, H. (2020). The role of arts in improving health and wellbeing. https://assets.publishing.service.gov.uk government/uploads/system/uploads/attachment_data/file/929773/DCMS_report_April_2020_finalx__1_.pdf

[37] The Heritage Alliance. (2020). Heritage, Health and Wellbeing: A Heritage Alliance Report. https://www.theheritagealliance.org.uk/wp-content/uploads/2020/10/Heritage-Alliance-AnnualReport_2020_Online.pdf

[38] Arts Council England. (2018). Arts and culture in health and wellbeing and in the criminal justice system: a summary of evidence. https://www.artscouncil.org.uk/arts-and-culture-health-and-wellbeing-and-criminal-justice-system-summary-evidence

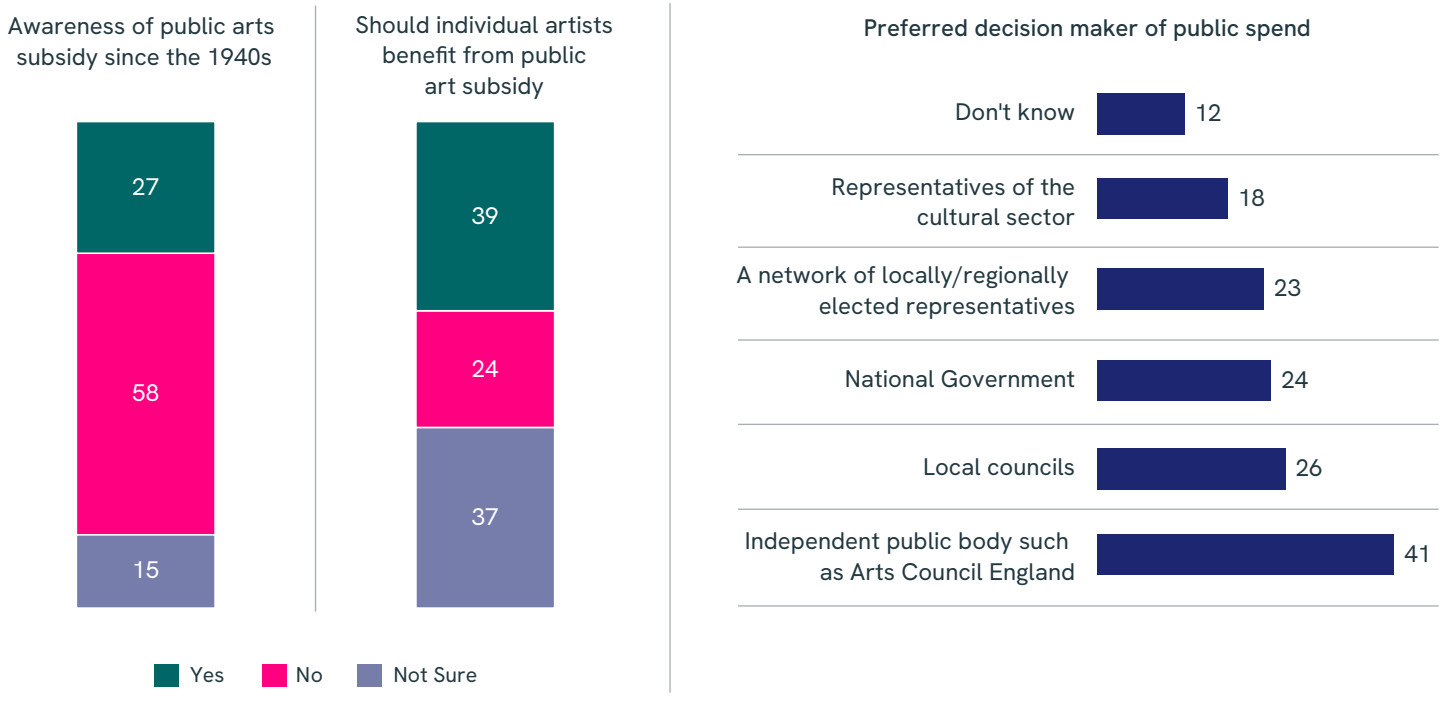
[39] Clift, S., Phillips, K., & Pritchard, S. (2021). The need for robust critique of research on social and health impacts of the arts. Cultural Trends, 30(5). https://doi.org/10.1080/09548963.2021.1910492

[40] Arts Council England. (2018). Public Tracking. https://www.artscouncil.org.uk/sites/default/files/download-file/Stakeholder_Research_Public_Surveys_2018_0.pdf

Similarly, our survey found that only a minority (24%) of English adults oppose the idea of public subsidy supporting artists directly – as opposed to distributing grants to organisations, venues or projects. Yet, a larger proportion of the public (37%) is unsure whether providing support directly to artists is a good idea.

With regards to who makes decisions about public spending on culture and the arts, the public seems to prefer an independent public body such as Arts Council England, with 41% saying so. According to about a quarter, local councils (26%), national government (24%), networks of locally/regionally elected representatives (23%) should be in charge of making decision about public spending on culture and the arts.

Figure 29. Awareness of and attitudes to public subsidy for culture and the arts

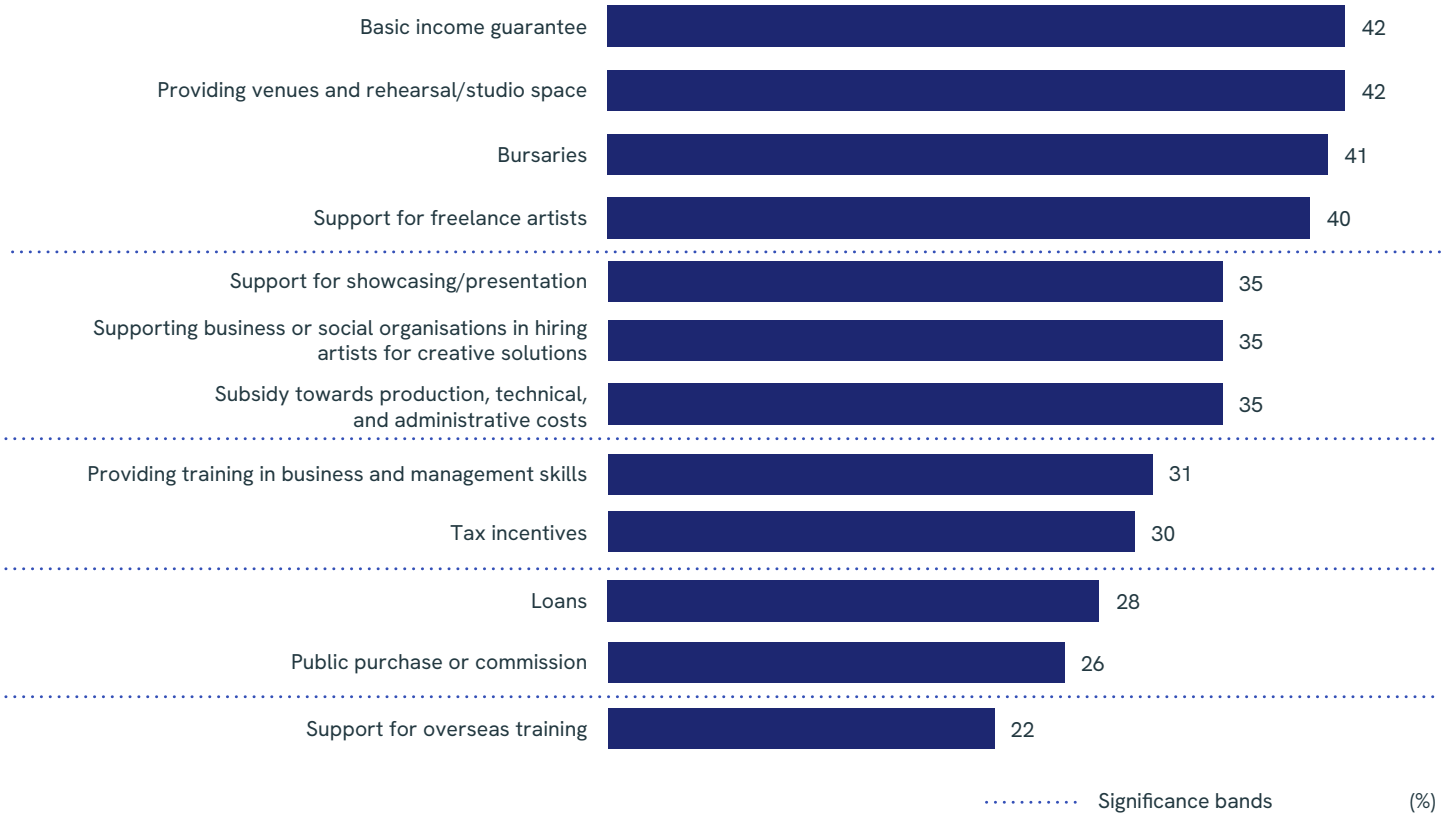


Q22. Do you know that there has been public subsidy for arts and culture in England since the 1940s? Q24. So far, public arts subsidy has taken place mainly in the form of grants for organisations, venues and projects. Do you think that individual artists should be directly supported via public arts subsidy? Base: All respondents: (n=2123) Q26. Who do you think should make decisions about public spending on the arts? Base: All respondents: (n=2123)

Younger members of the public are significantly more susceptible to supporting artists directly, with 57% of those under 35 supporting the idea compared to just 19% of those over 55. Those who are interested in the arts are also more likely to support the idea of artists benefiting directly from public subsidy compared to those who are not interested (48% and 27% respectively). Similarly, Londoners and representatives of ethnic minority groups are also significantly more supportive of the idea (49% and 55% respectively).

Those who think that artists should be direct beneficiaries of public cultural subsidies do not seem to agree on a single measure to support artists. Instead, a relatively wide range of measures are seen as suitable: basic income guarantee[41] (41%), providing venues and rehearsal/studio space (42%), bursaries (41%) and support for freelance artists (40%). A third of the public thinks that support for showcasing/presentation (35%), supporting business or social organisations in bringing artists for creative solutions (35%), subsidy towards production, technical and administrative costs (35%) would be suitable to this end.

Figure 30. Suitable measures to support artists directly

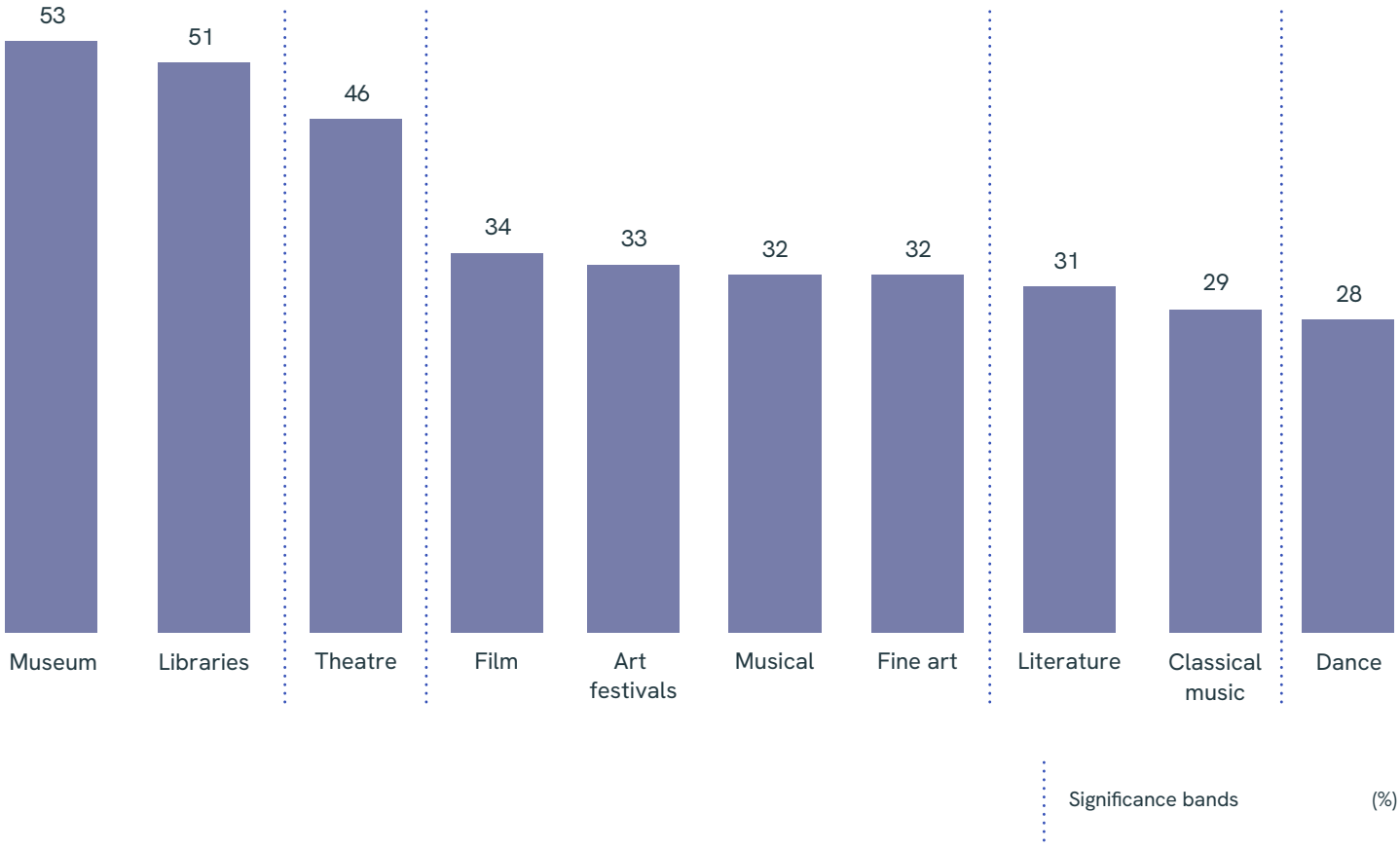


Q25. What kind of measure would be suitable to support artists? Base: All respondents: (n=2123)

[41] The following definition was given to the respondents alongside this measure: 'artists being guaranteed to have enough income to meet their basic needs without a work requirement'.

Half of the public agree that museums (53%) and libraries (51%) should be financially supported via public subsidy (see Figure 31). These are followed by theatre (46%) and with a wider margin by film (34%), art festivals (33%), musicals (32%) and fine art (32%). According to the public, digital arts and photography are the two artforms least deserving of public subsides with only a minority – 18% and 21% respectively – selecting these options. It seems noteworthy that opera and ballet – the so-called highbrow genres within the performing arts – are among the least popular options selected by 24% and 26% respectively, which resonates with the low levels of attendance reported for these art forms (see Figure 8). Finally, only a small minority of 6% said 'none of these' while 11% was not sure and opted for the 'I don't know' option.

Figure 31. Preferred beneficiaries of public subsidy for culture and the arts

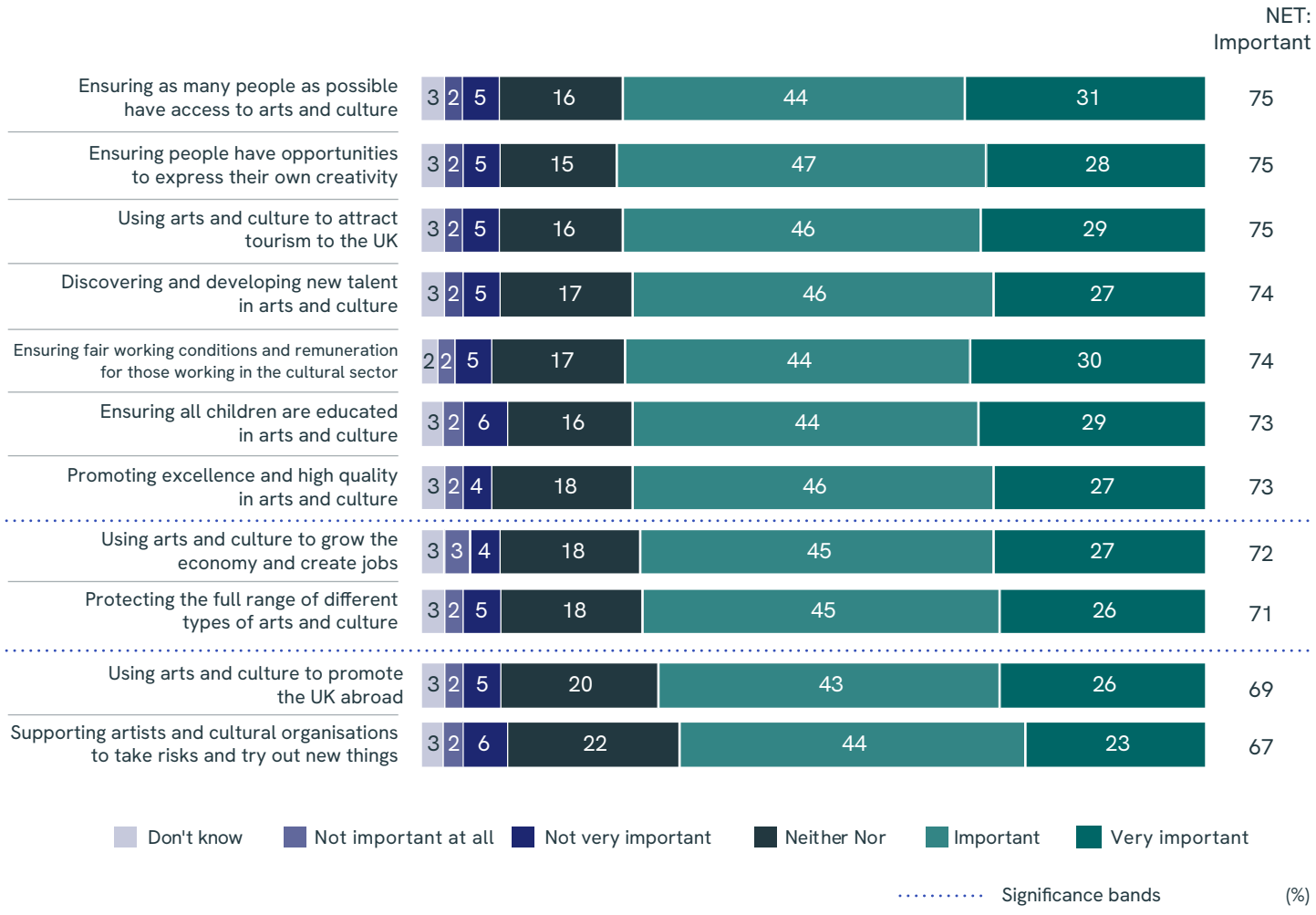


Q23. In your view, which, if any, of the following forms of arts and culture should be supported financially via public arts subsidy? Base: All respondents: (n=2123)

2.3.3. Goals and values for cultural policy and local cultural organisations

Our survey sought to understand people's outlook on cultural policy. First, we tried to delimit the perceived boundaries/scope of cultural policy by asking the public to establish the importance of a range of (11) goals for government cultural policy. A clear majority view each of the goals as important, suggesting that most adults see government cultural policy as having a range of – equally important – goals (see Figure 32). 38% of the public say that government should have no role in culture and the arts. This can be compared with Arts Council England[42] survey finding that only 11% say so, hinting that we need further research on public's attitude to state cultural subsidy.

Figure 32. Important goals for government cultural policy



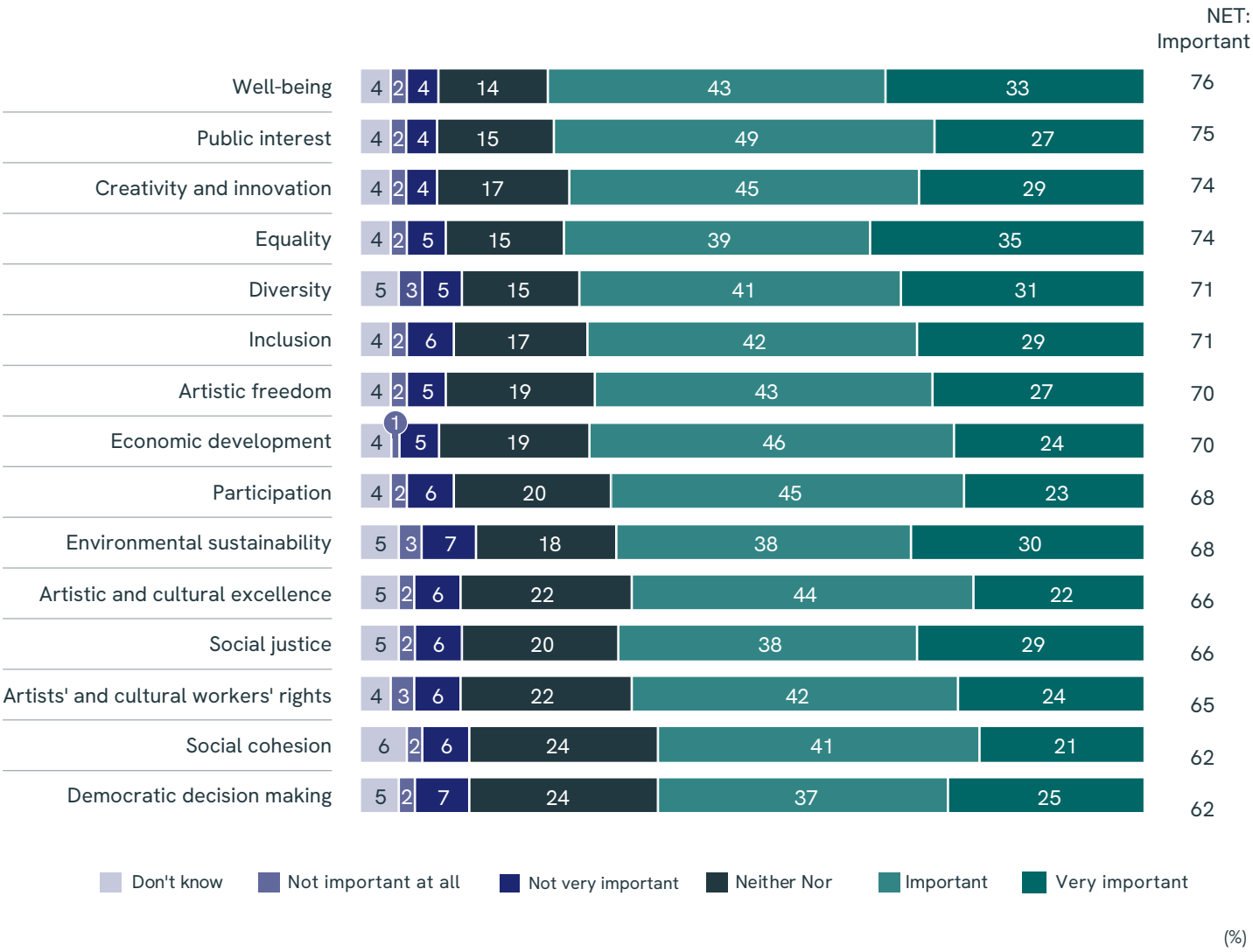
Q21. For government cultural policy, how important do you think the following goals are?
Base: All respondents: (n=2123)

[42] Arts Council England. (2018). Public Tracking. https://www.artscouncil.org.uk/sites/default/files/download-file/Stakeholder_Research_Public_Surveys_2018_0.pdf

Interestingly, those who are interested in the arts are more likely (42%) to say that government should have no role in culture and the arts compared to those who are not (32%). Finally, a majority of those not interested in the arts still agree with all tested goals, with at least half (52%) agreeing with each of the 11 goals.

We also asked the public to evaluate the importance of various social values for government cultural policy. The public did not prioritise a single or only a few values (see Figure 33). Instead, the majority (at least 62%) of English adults judged all (15) options tested as important.

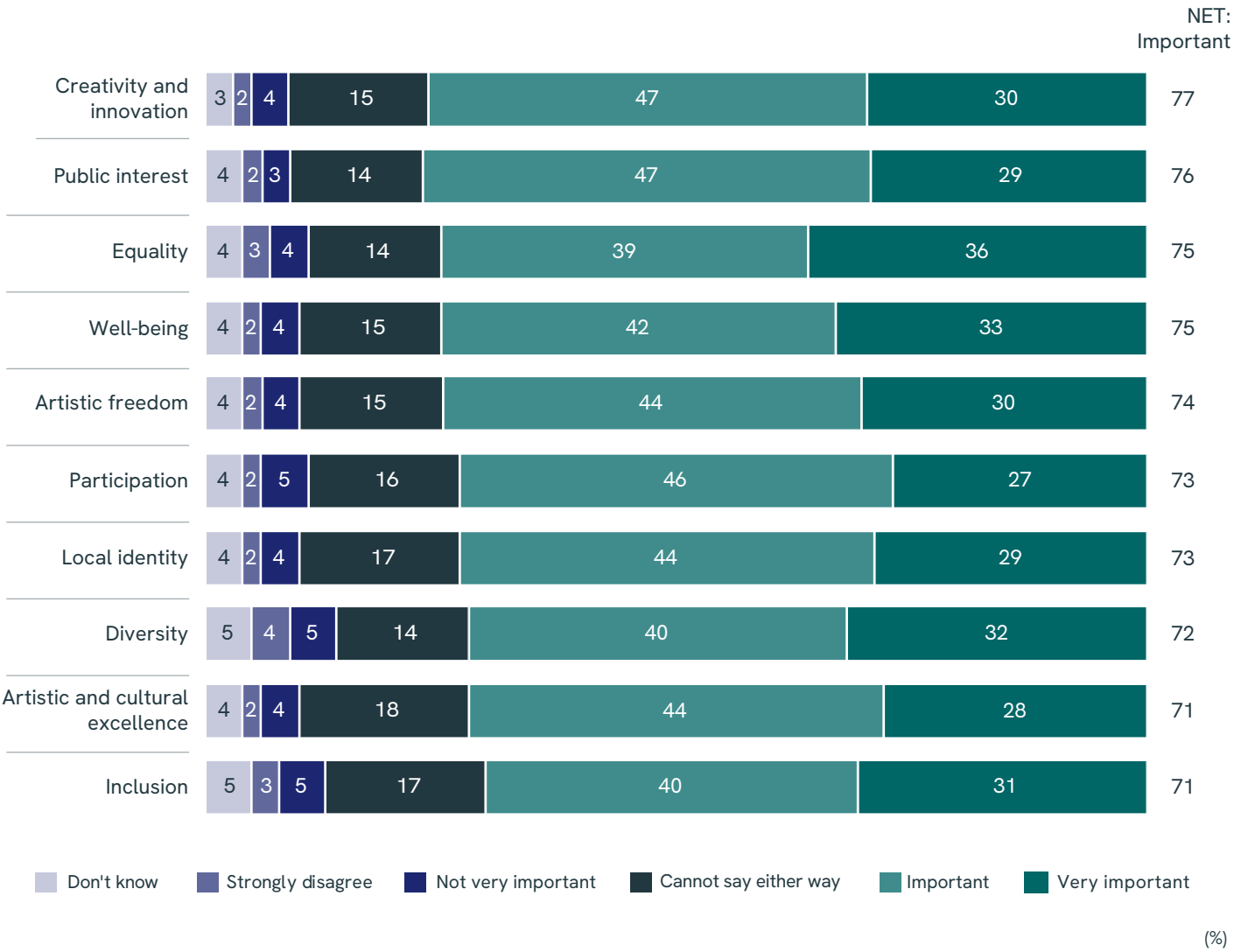
Figure 33. Important social values for government cultural policy



Q20. For government cultural policy, how important do you think the following values are?
Base: All respondents: (n=2123)

Finally, we asked the survey participants to evaluate the importance of 16 different social values for local arts and cultural organisations/venues. The results show similar dynamics to those just discussed above. With a clear majority perceiving each of the values tested as important, the public believes that local arts and cultural organisations/venues should operate based on a range of – somewhat equally important – values, ranging from 'creativity and innovation' to 'social cohesion' (see Figure 34). Notably, women are more likely to judge all the tested values as important compared to men (at least by 5%) while ethnic minority representatives are more likely to say that the value of social justice is important for local arts and cultural organisations than the white population (76% and 64% respectively).

Figure 34. Important values for local cultural organisations



Q27. For local arts and cultural organisations/venues, how important do you feel the following values are? Base: All respondents: (n=2123)

Looking at the above two figures in conjunction, we can see that instead of assigning different values for government cultural policy and for local arts and cultural organisations/venues, the public displays agreement in assigning most values. For example, with slight difference in order, the top four most important social values for government cultural policy and local cultural organisations are creativity and innovation, well-being, public interest, and equality. There are, however, some differences. For example, the value of artistic and cultural excellence seems to be esteemed as more important for local cultural organisation (71%) than for government cultural policy (66%). Likewise, artistic freedom and participation values are less important for government cultural policy.

3. Conclusion

3.1. Summary of key findings

- The survey findings point towards a **mismatch between the public's and policymakers' everyday understanding of terms such as culture and art.** While cultural policymakers in the UK have shifted away from the terms art, arts and artist in their articulation of cultural policy, the public continues to associate 'creativity' with 'art' much stronger than with culture.
- The survey found some evidence suggesting that **the lack of interest in the arts is sticky**, as those who are not interested in the arts are more likely to have lacked opportunities to participate in the arts as children, and are significantly less likely to admit a possibility of becoming (more) interested in the future.
- In terms of important forms of cultural engagement, we found that watching TV is the most important activity. **The public perceives cultural/artistic activities which require more active participation** (e.g., creating social media content or playing a musical instrument) **as less important for their cultural engagement** when compared to activities that are subject to more passive engagement (watching TV or going to the cinema), with the exception of cooking and gardening.
- **Cinema is the most popular cultural/artistic venue to attend by the English public.**
- **Nearly 40% of English adults are still hesitant to visit cultural venues due to the risk of contracting the COVID-19 virus.** In the coming year, while the cinema would still remain the most attended venue, the attendance of live music events, outdoor festivals/carnival/street arts, musicals as well as heritage sites and museums is likely to rise.
- **The online viewership levels** of certain cultural/artistic forms/events are somewhat **higher for events that are free of charge as well as among younger population,** the latter signifying that the viewership of cultural/artistic events online is likely to be in a long-term upward trend.
- Over the course of the COVID-19 pandemic, a bigger proportion of the public (61%) realised the importance of in-person/live cultural experiences compared to those members of the public (half) who realised the importance of online events, suggesting that **in-person engagement with culture and the arts** is still preferred over online engagement for many cultural/art forms.

- Although the levels of reading are likely to drop slightly within the next 12 months, reading would remain the most common activity for the public to participate in. In the coming year, **the levels of participation across other – less homebound – activities are likely to slightly rise.**
- **Different and multiple forms of participation are preferred for different forms of cultural/artistic activities,** with doing/practicing at home being the most popular form of participating in cultural/artistic activities.
- **People believe that free admission would increase the public's participation** in cultural/artistic activities the most. Yet, **the significance of children as a driver** should not be ignored.
- **The lack of interest in the arts** is not an isolated phenomenon but **is correlated with one's levels of social participation overall**, as those interested in the arts are significantly more likely to participate in all kinds of social organisations and activities.
- **The public is not particularly satisfied with the state of cultural and arts provision in their local areas**, with only about 1 in 3 saying that there is a good range of cultural and arts events to attend locally. Yorkshire & Humberside residents are among the least satisfied.
- The English public displays relatively **low levels of interest when it comes to getting involved with local cultural/artistic events**. Here, money is the top barrier.
- **Outdoor cultural events as well as having a focus on child engagement and education** on creative careers for the young could improve local cultural environment.
- **The public recognises a wide range of cultural value.** Instead of prioritising a single (or a set of few) value(s), people showed appreciation for a wide range of values and benefits that culture and the arts have for them as individuals, as well as for their local area and society more broadly. This finding offers a refreshing antithesis to the existing dichotomy and debate on this matter.
- **Only 1 in 5 would object to individual artists benefiting directly.** The public feels that an independent public body is best suited to be the decision maker in charge of public spending on the arts.

- While a significant portion of the population is unsure, **only a minority is against the idea of artists benefiting directly from public arts subsidies** with young members of the public being more susceptible to the idea.
- The public ascribes a wide range of **'social values' for both government cultural policy and for local arts and cultural organisations/venues.** Similarly, the public **does not single out a single important goal for government cultural policy** by judging each goal (tested within the survey) as important.

3.2. Avenues for future research

From the survey results, the ethnic minorities stood out as a category that deserves further and more targeted investigation. All respondents from the BAME population, when clustered together, appear to be more interested in the arts compared to their white counterparts, with 64% of ethnic minority respondents and 55% of the white population expressing interest in the arts. The former are also more predisposed to viewing cultural events online, both free and paid for (as summarised in Figure 10), as well as more supportive of the idea that individual artists should directly benefit from public art subsidy with 55% of ethnic minority representatives saying so compared to 39% on average.

Furthermore, with 73% of black participants being interested in the arts, there is some evidence to speculate that black population is significantly more interested in the arts compared to white and Asian (56%) public. As the same time, nearly half of black participants (47%) felt that the arts are not for them, while only about 1 in 3 of white and Asian participants felt this.

However, the small sample size did not allow for a conclusive reflection on the disparities between different ethnic groups.

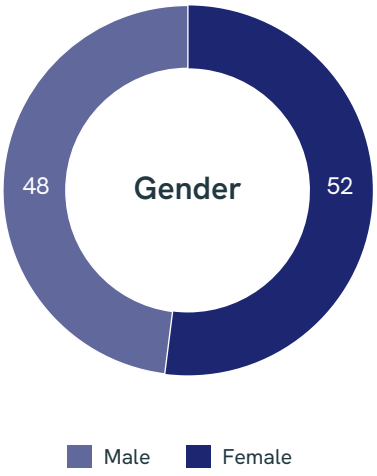
Given some of the interesting trends that have emerged from the survey data on ethnic minorities as a cluster, and on ethnic minority groups individually, we call for more quantitative research and surveys that have a bigger sample and look specifically across various ethnic minority groups to establish, with more certainty, their outlook on cultural values, their preferences with regards to cultural engagement, their outlook on cultural policy and more.

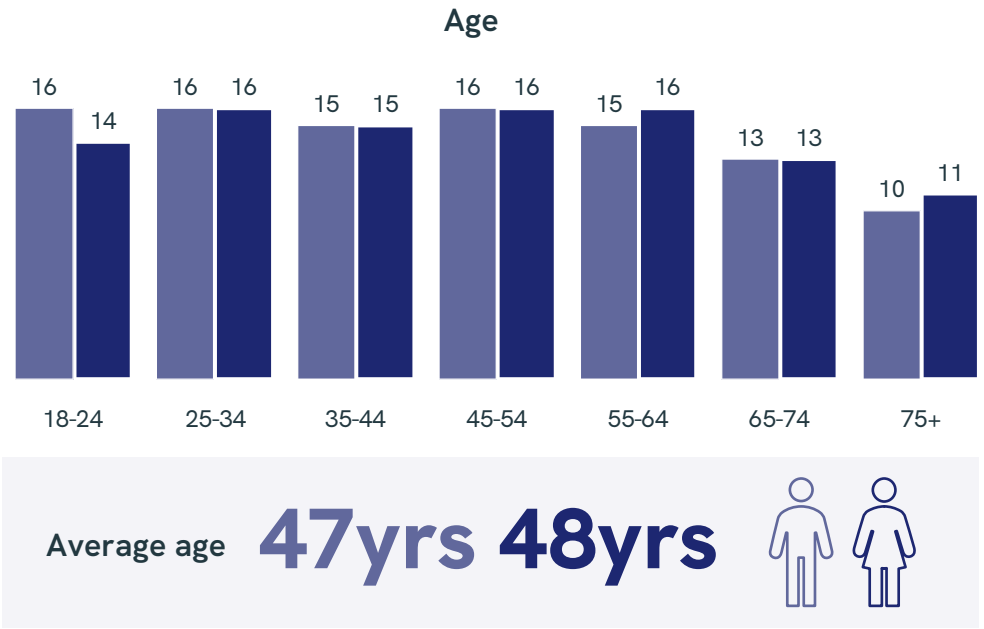
Finally, we also would like to highlight the need for further research to generate more nuanced understanding of people's individual and collective motivations to engage with and/or participate in 1) local cultural opportunities and 2) in culture and the arts more broadly. Where do such interests and motivations originate from? What reinforces such interests/motivations or the lack of them? What is the role of compulsory education and education policy here? Answers to these questions will be helpful for rethinking and further development of policy strategies to increase local cultural engagement and create opportunities for ordinary people to explore their own creativity as well as enjoy offers from cultural and arts organisations.

4. Appendices

4.1. Appendix 1. Sample composition

Demographic summary

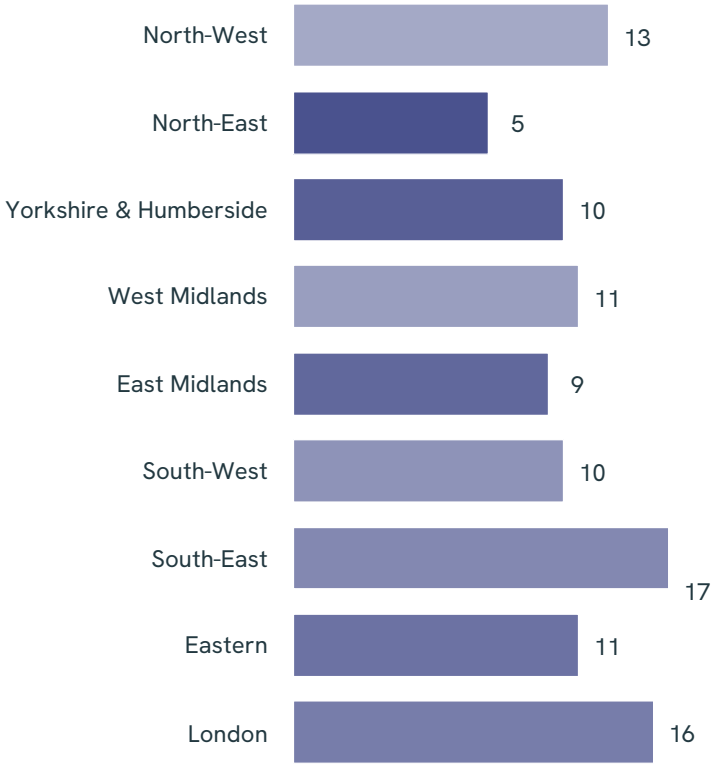


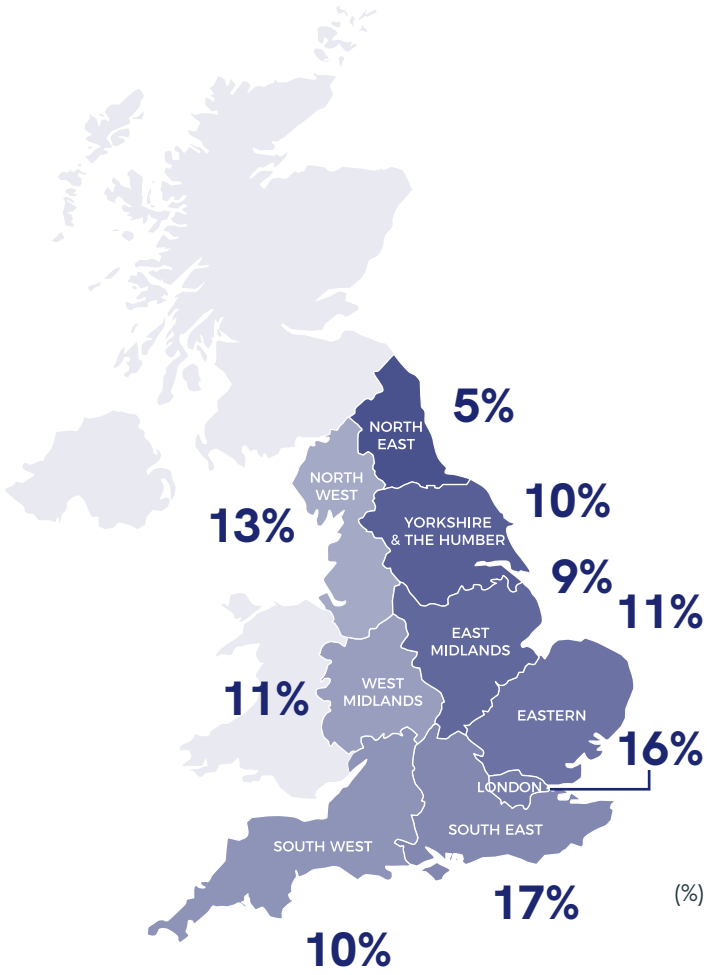


(%)

Q.Gender / Q.Age. Base: All respondents (n=2123) Male respondents (n=1014) Female respondents (n=1098)

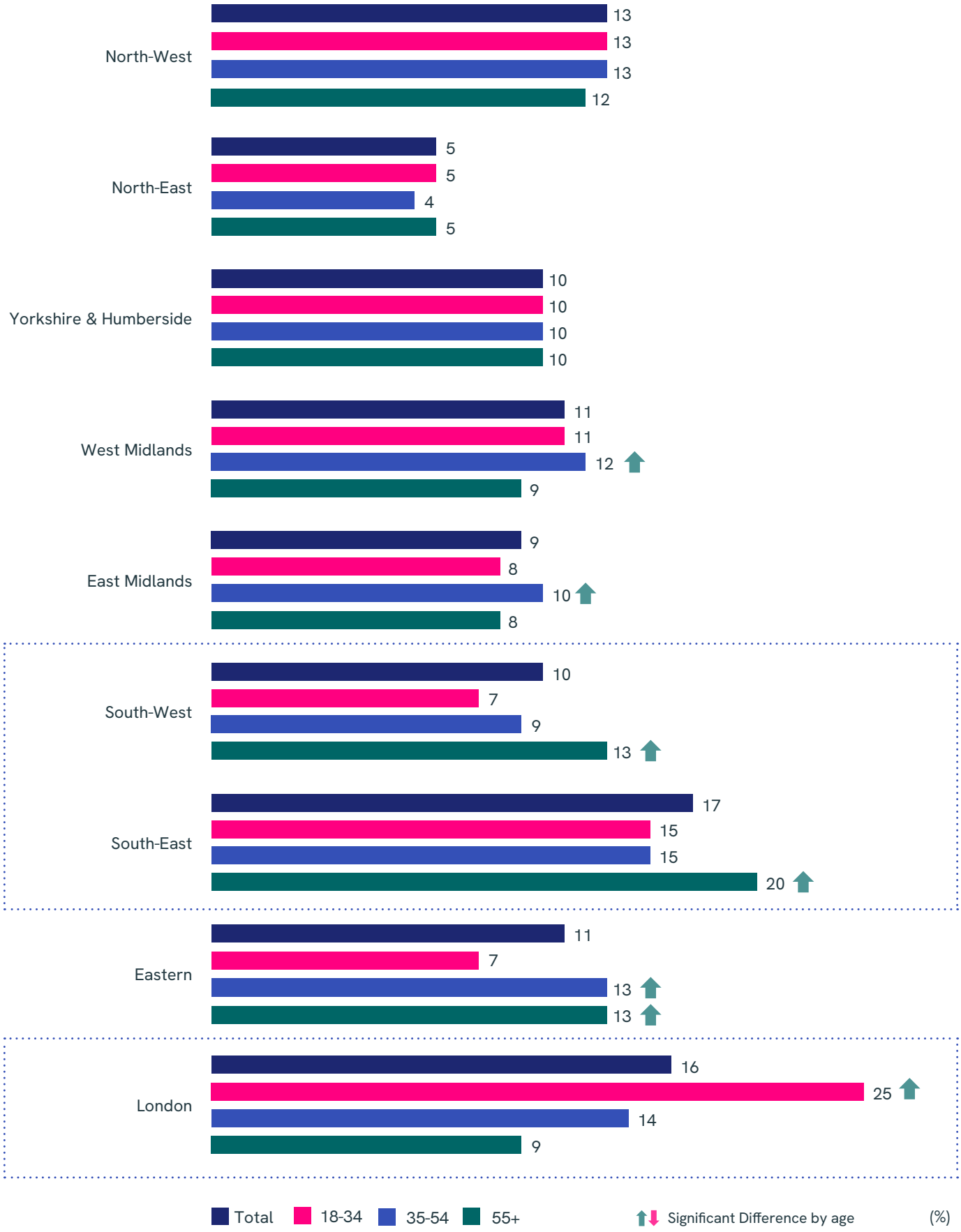
Region





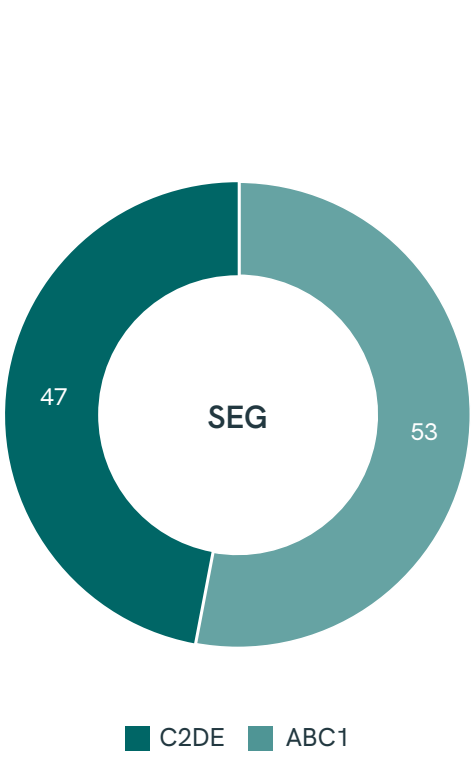
UK Region. Base: All respondents (n=2123)

Difference in age profile by region



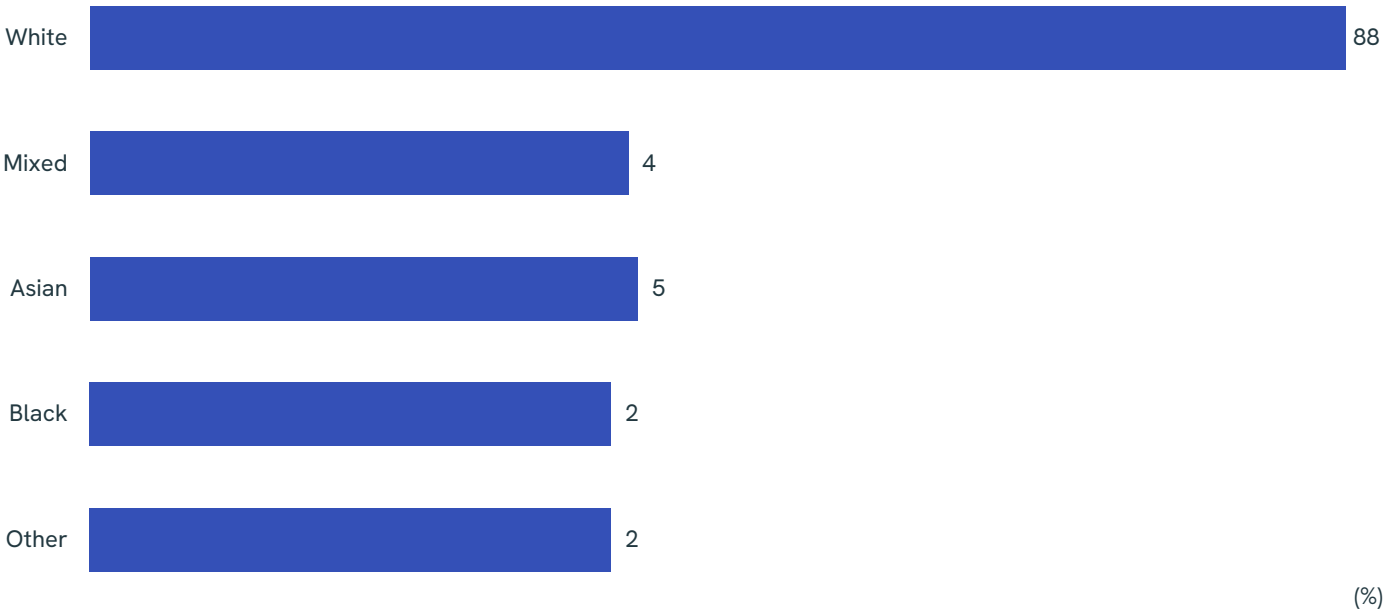
UK Region. Base: All respondents (n=2123) 18-34 (n=673) 35-54 (n=705) 55+ (n=745)

SEG and income



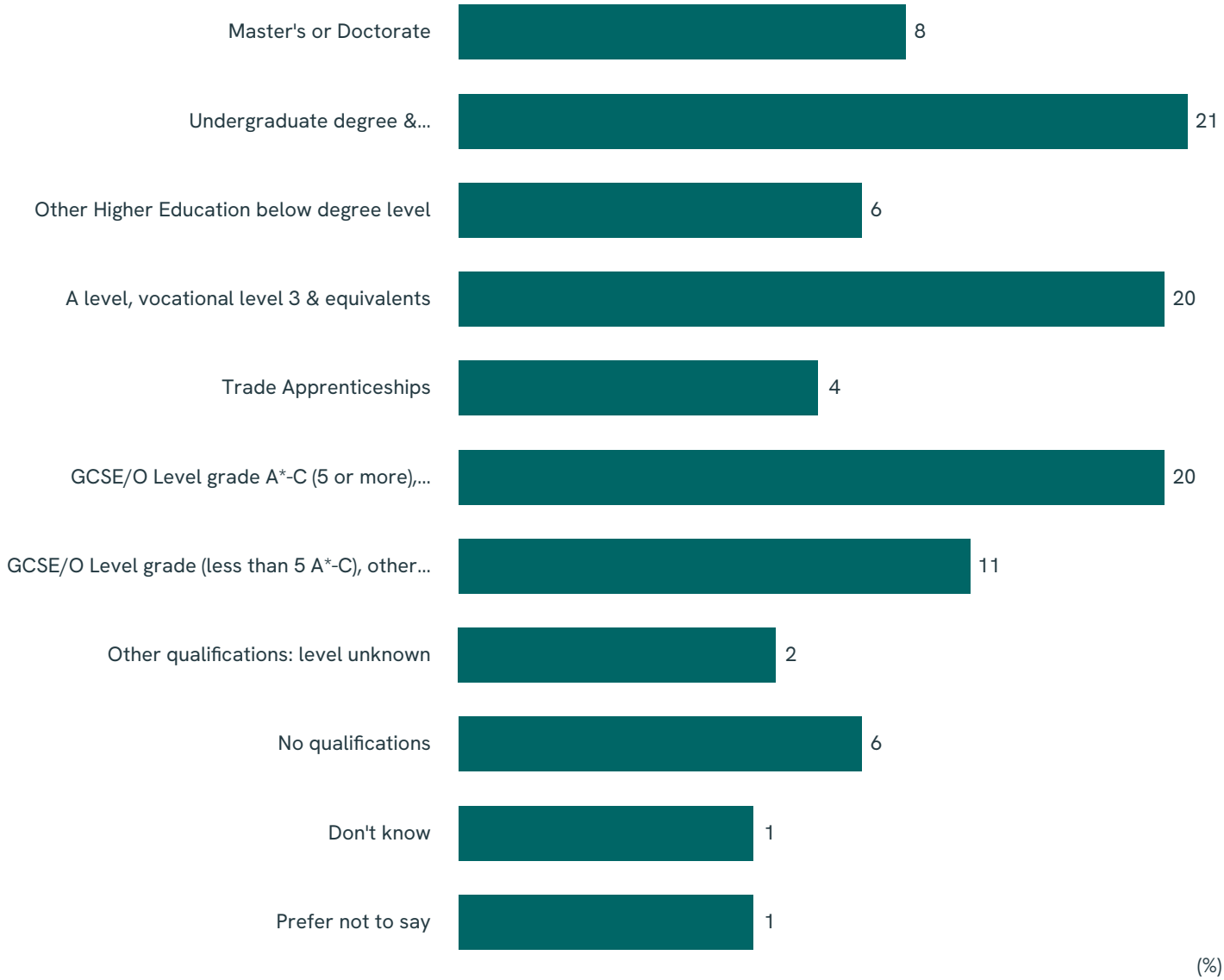
Q. Occupation/Occupation Retired. Q. Income. Base: All respondents (n=2123)

Ethnicity



Q. Ethnicity. Base: All respondents (n=2123)

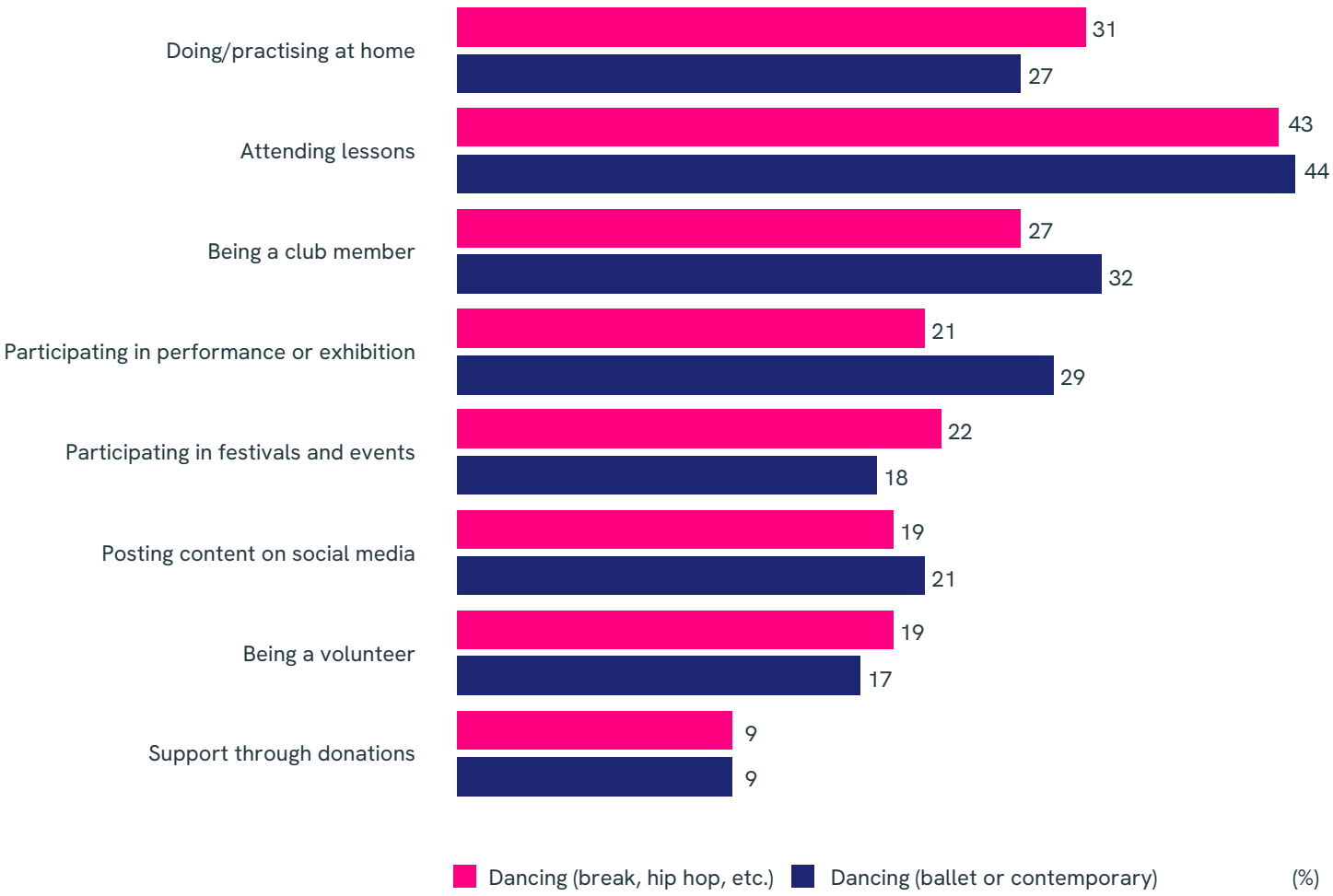
Education Level



Q. Education. What is the highest educational level that you have achieved to date?
Base: All respondents (n=2123)

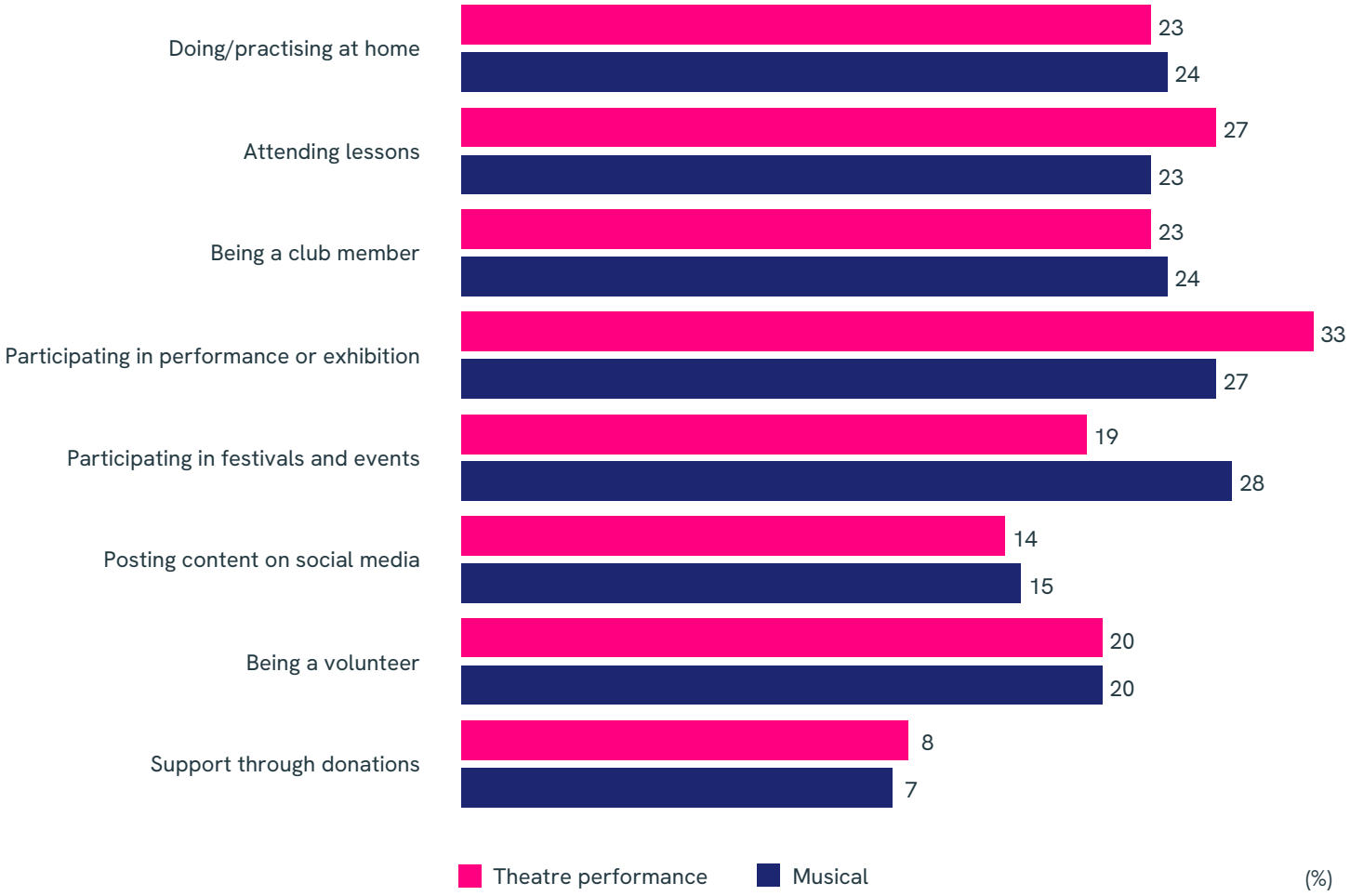
4.2. Appendix 2. Preference on how to participate in different art forms

Dancing



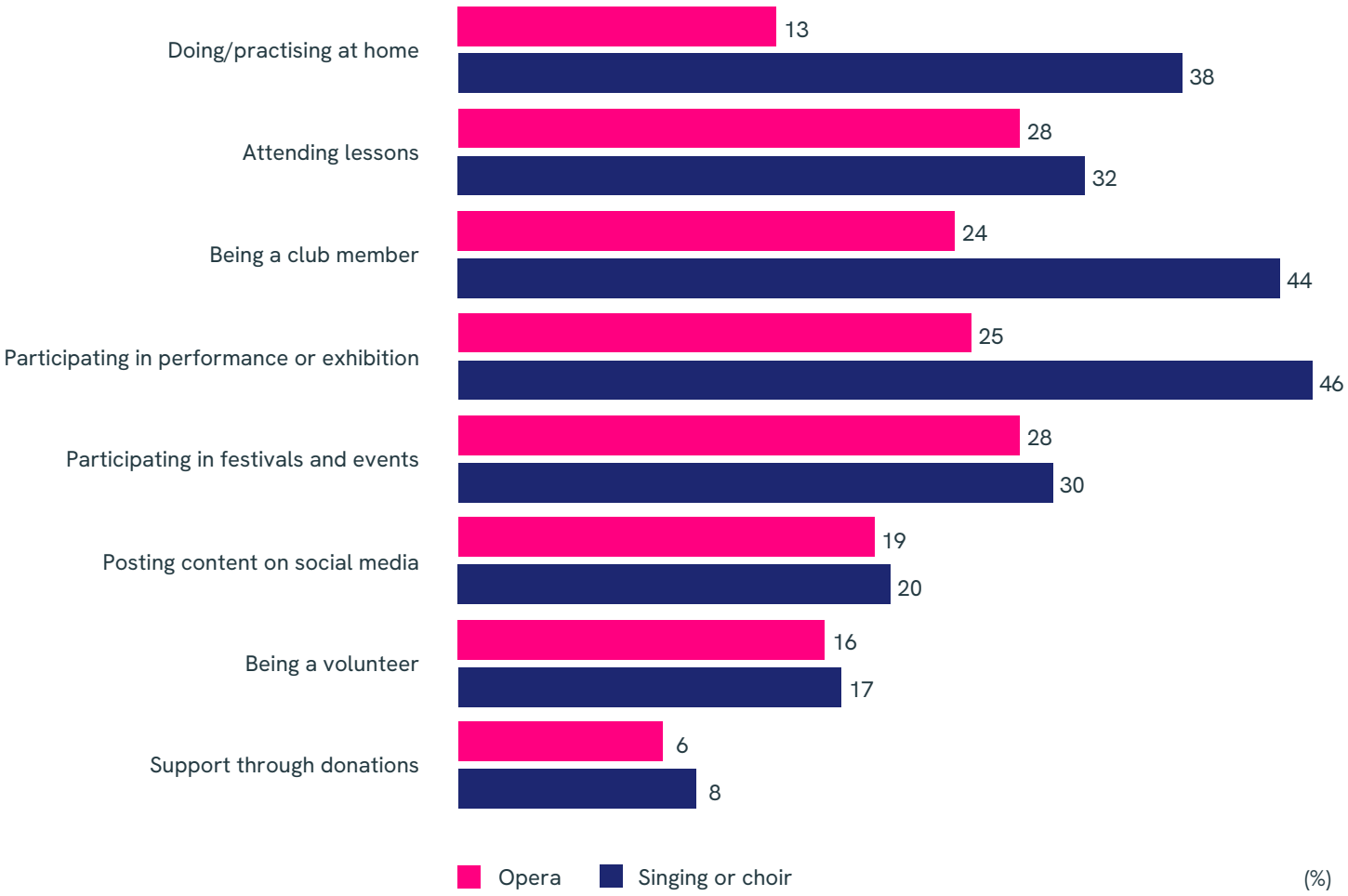
Q11. If Covid-19 were no longer present or caused no risk at all, how would you like to participate in your chosen activities? Base: Activities want to participate in: Dancing (break, hip hop, etc.) (n=251), Dancing (ballet or contemporary) (n=207)

Theatre and musicals



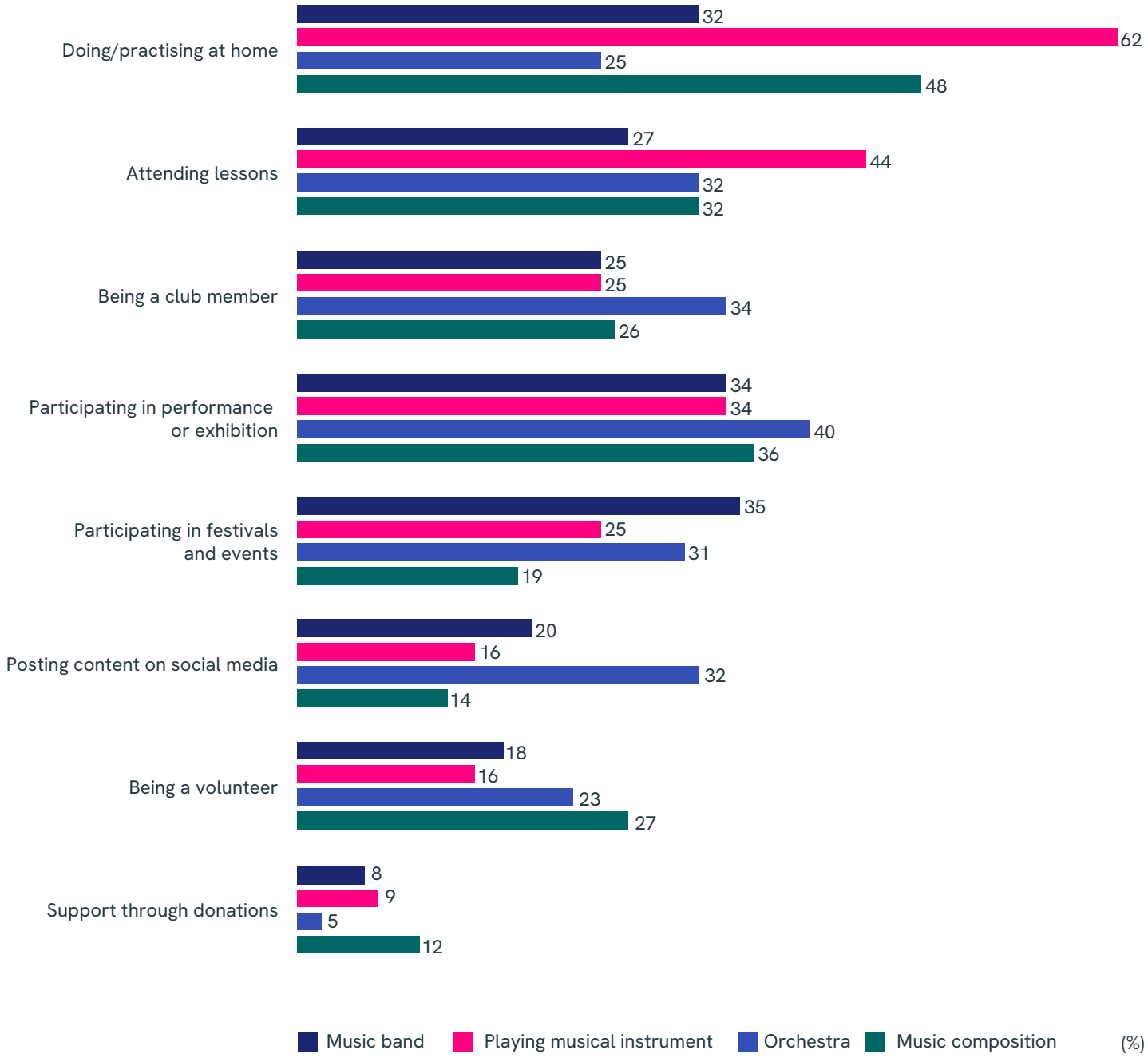
Q11. If Covid-19 were no longer present or caused no risk at all, how would you like to participate in your chosen activities? Base: Activities want to participate in: Theatre performance (n=349), Musical (n=350)

Opera and singing/choir



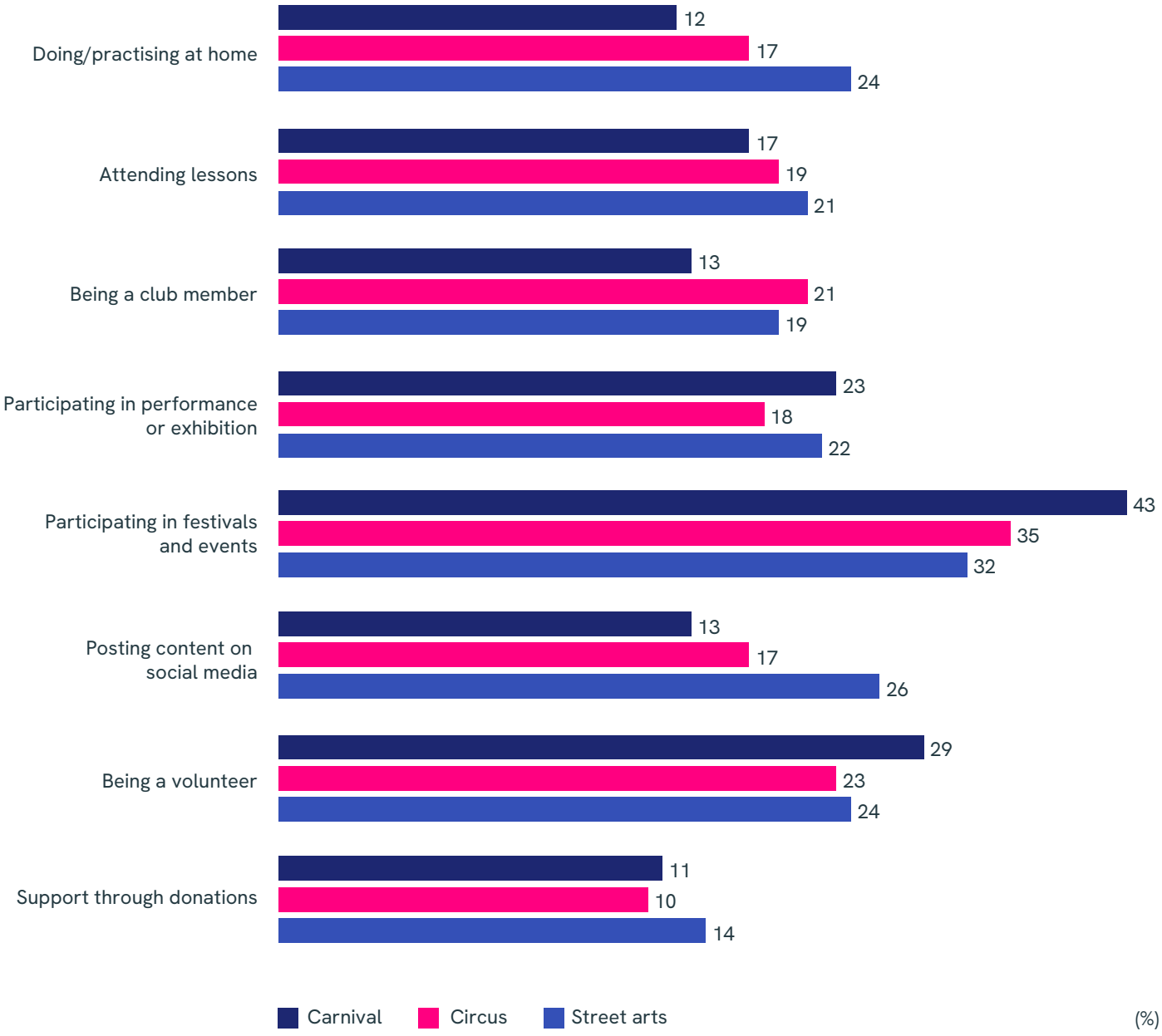
Q11. If Covid-19 were no longer present or caused no risk at all, how would you like to participate in your chosen activities? Base: Activities want to participate in: Opera (n=165), Singing or Choir (n=235)

Music band, playing musical instrument, orchestra, and music composition



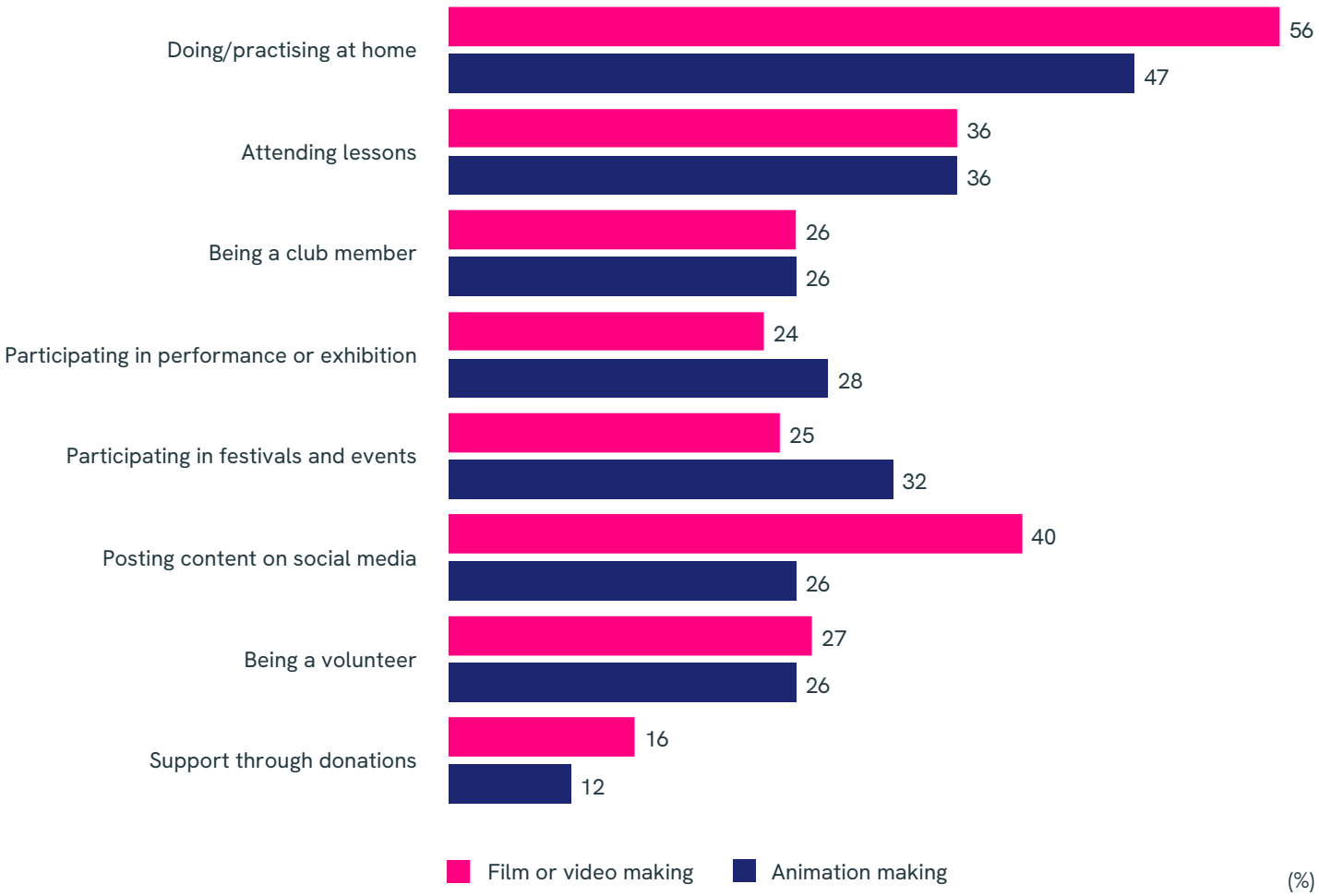
Q11. If Covid-19 were no longer present or caused no risk at all, how would you like to participate in your chosen activities? Base: Activities want to participate in: music bands (n=248), playing musical instrument (n=263) orchestra (n=86) music composition (n=91)

Carnival, circus, street art



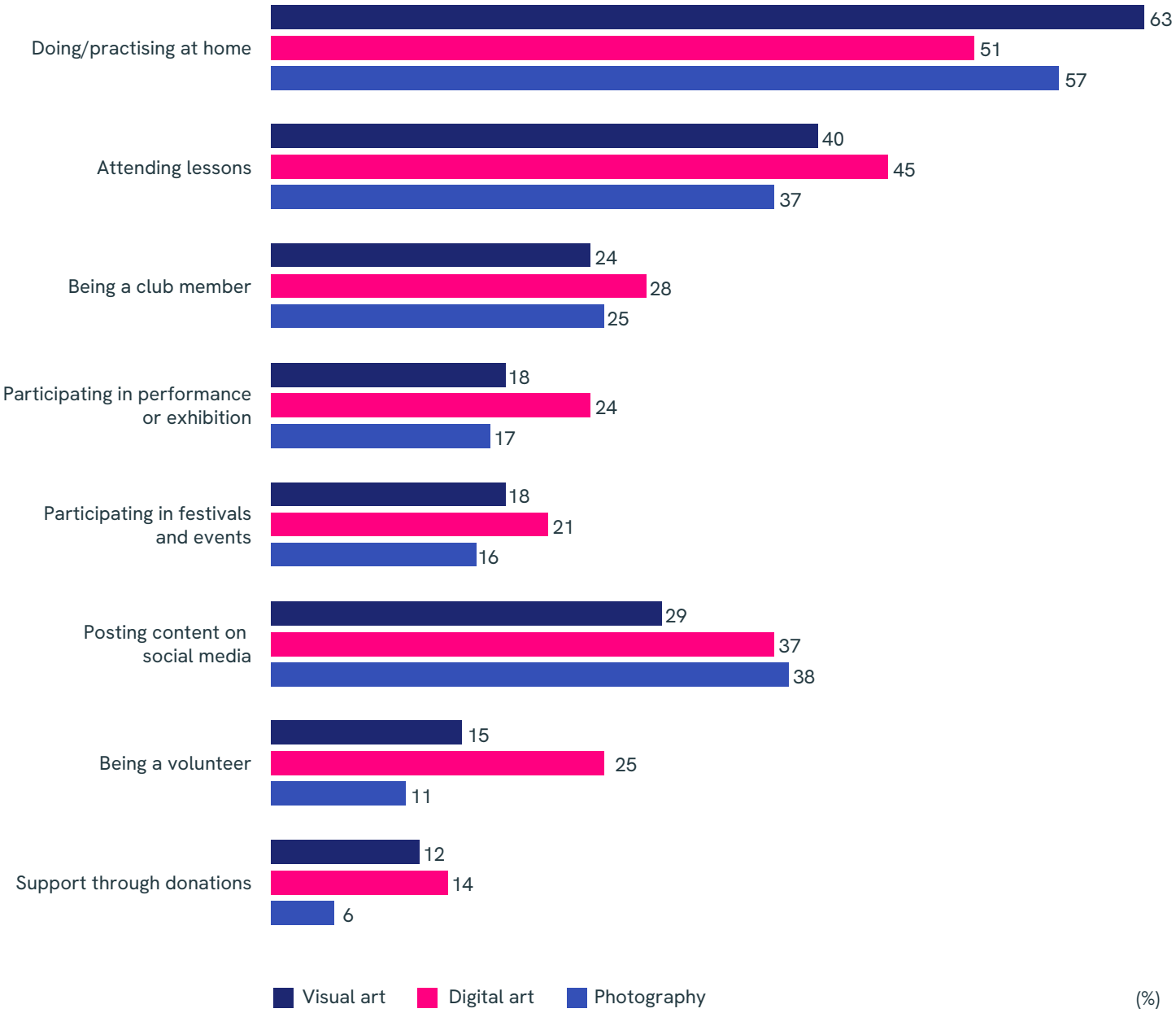
Q11. If Covid-19 were no longer present or caused no risk at all, how would you like to participate in your chosen activities? Base: Activities want to participate in: carnival (n=238), circus (n=191) street arts (n=230)

Film/videomaking and animation making



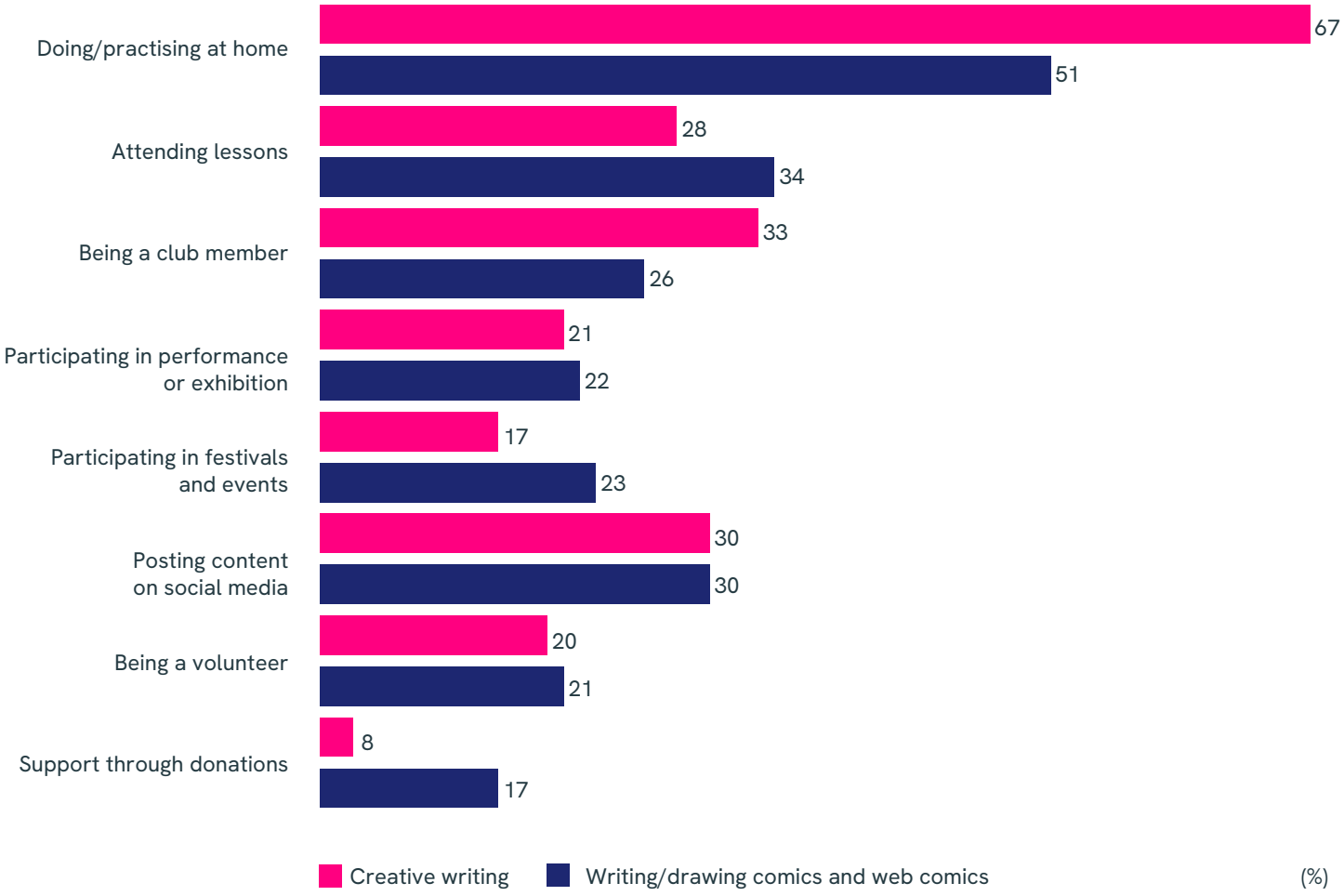
Q11. If Covid-19 were no longer present or caused no risk at all, how would you like to participate in your chosen activities? Base: Activities want to participate in: film making (n=170), animation making (n=104)

Visual art, digital art, and photography



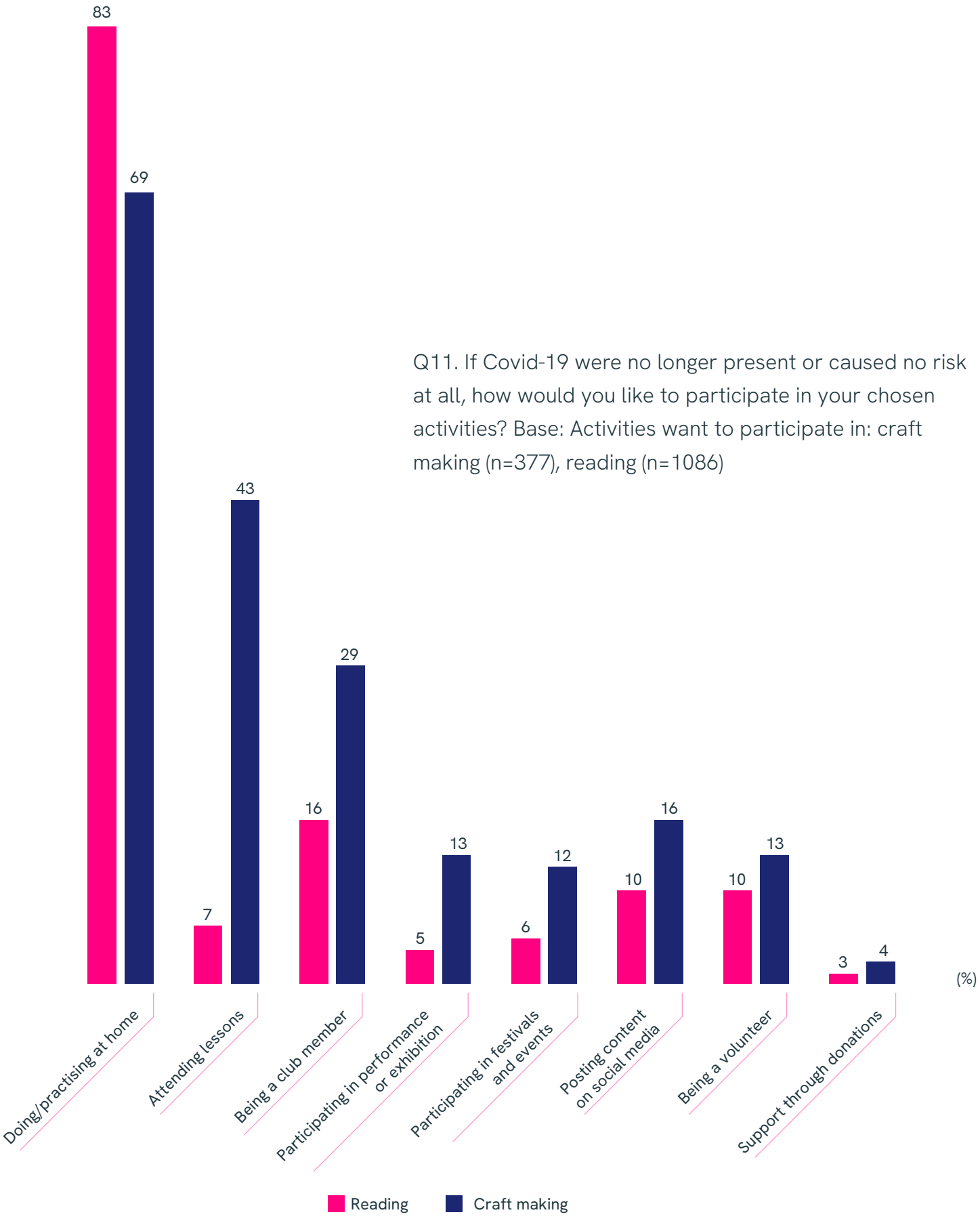
Q11. If Covid-19 were no longer present or caused no risk at all, how would you like to participate in your chosen activities? Base: Activities want to participate in: visual art (n=212), digital art (n=111) photography (n=351)

Creative writing and writing/drawing comics and webcomics



Q11. If Covid-19 were no longer present or caused no risk at all, how would you like to participate in your chosen activities? Base: Activities want to participate in: creative writing (n=133), Writing/ drawing comics and web comics (n=248)

Reading and craft making



Q11. If Covid-19 were no longer present or caused no risk at all, how would you like to participate in your chosen activities? Base: Activities want to participate in: craft making (n=377), reading (n=1086)