

Audience Spectrum and COVID-19

High Engagement Groups	Metroculturals	Commuterland Culturebuffs	Experience Seekers
Health and Wellbeing	High involvement in sports - more likely to have been out running/exercising in city parks	Usually highly engaged in sports and activities. Donate to medical research, suggesting they particularly value health. Older but generally not old (more likely than average to be 50-70) - but men in this age range have been higher risk from COVID-19-19. A quarter have a disability or long-term illness, which could have been added risk factors, or made lockdown more difficult.	Generally active, missing gyms, so more likely to have been exercising in city parks. High concentrations in London and urban NW, where there have been hotspots for COVID-19.
Income and Employment	Urban and high-skilled jobs. Probably able to work from home during lockdown, avoiding usual commutes.	Relatively financially secure: if work, likely to be able to do so remotely (and if so, saving time and money on substantial commutes). Volunteer a lot, which may have been interrupted, or refocused locally.	Usually have disposable income but employment and income may be affected by recession/furlough. Unlikely to have substantial savings as a 'rainy day fund' but may have been doing online learning if furloughed.
Family and Relationships	Some with children, but many single - risk of feeling unusually isolated during lockdown, given usual busy lifestyle. Likely to volunteer - may well be part of local mutual support groups.	Mature families / retirees: likely to be missing seeing family members. Some older children may have returned home during lockdown.	Mix of singles and couples - could have been isolated from partners / social life by lockdown. Few have children, so won't have been home schooling.
Location and Environment	City-based, esp. London (with higher reliance on TFL). Peak was earlier than elsewhere in the country. Less active re 'home and garden'. Most likely to be missing foreign work/leisure travel.	Live in leafy provincial/greenbelt areas: space to go out for walks. Used to travelling for cultural (and other) experiences, so may be feeling a bit hemmed in, especially as they are often reliant on cars.	Live close to city centres - less access to green space, except exercise in busy city parks. Little focus on home and garden, e.g. DIY: may have felt particularly crowded and frustrated by lockdown. Usually big users of public transport; given activity levels/youth, may start cycling more.
Arts and Culture	Mostly likely to have missed arts during lockdown (high importance and frequency to general engagement) and likely to be relatively easier to encourage to return, though still preferring local and outdoor activities at first (avoiding the need to use public transport).	Leaning towards heritage and classical/traditional offers: the former taste will be met sooner than the latter as organisations reopen. Usually frequent attenders, so likely to feel they are missing out (but perhaps have missed the social / quality of experience of their usual engagement when accessing content online). Lots of National Trust and English Heritage members - so opening of their sites likely to be good news for them.	Varied tastes and open to new things. Less likely to be resistant to changes in format (e.g. streaming). Motivations re arts engagement often social, so likely to have missed this element of arts. Like reading but often too busy out at bars or restaurants, so may have been reading more than usual.

Digital and Streaming	Respond to e-comms, likely to have taken up digital offers during lockdown and to make recommendations to friends.	Already used arts organisations' websites, but a bit functionally: their high engagement in combination with lockdown may have encouraged them to use streaming much more than usual (especially for big name performers / organisations, e.g. National Theatre), which may have taken a little getting used to.	Already highly digitally engaged and look for variety in cultural consumption (and not big watchers of TV, though may have been watching Netflix). Likely to have spent a lot of time on social media during lockdown, inc. WhatsApp groups, and using 'second screens' during digital consumption of culture.
Importance of Arts	Highest engagement for both arts and museums; arts are v important to them and their identity: likely to be keen to return. Highest donors for arts.	High importance and broad knowledge (so likely to know which online content matches their tastes), have a range of motivation types (social, self-improvement, learning for older children). More likely to have spent lockdown reading (high propensity) than gaming (low).	Nearly half consider themselves 'arty', so likely to have stayed engaged in arts in different ways during lockdown (inc. creatively, with 86% typically participated in arts activity in the last 12 months).
Risk	Open to new approaches / innovation; below-average sense of personal risk. Value the things that lockdown takes away: busy, varied city life.	Some can be culturally a little traditional. Perhaps also more risk averse re health, given their age (and having been able to isolate effectively during lockdown - 'why spoil it now?').	Open to new approaches / innovation; like taking cultural risks. May also be more confident coming out of lockdown, given age and preference for city life.
Other	Charitable support to arts, disaster relief and homelessness. May take advantage of opportunities to travel to Spain etc for summer holidays.	Potential donors, inc for larger amounts, or in converting tickets to donations. Highest group for volunteering (esp. for heritage), which will have been interrupted by lockdown.	Likely to have been particularly supportive of Black Lives Matter.

Medium Engagement Groups	Dormitory Dependables	Trips & Treats	Home & Heritage
Health and Wellbeing	Based away from major urban centres, but could mean that, where relevant, news of any local outbreaks feels more of an immediate threat.	May have been doing the Joe Wicks PE sessions on Youtube. Generally sporty and do team sports and dance, as well as attending matches.	Relatively older (nearly all over 60 and 69% are 70+), so have been more at risk (some perhaps shielding) and likely to have been taking lockdown particularly seriously. May be conscious of less capacity in local medical facilities.
Income and Employment	Tend to be fairly affluent. Concerns from unemployment may be particularly linked to missing what would have been the peak earning years of their career.	Comfortably off, but not wealthy - and costs of children will mean have less buffer than some other segments if there's an impact on income. Home working, where possible, likely to be a new experience. Some key workers in this group who will have been working throughout (and with children going into school).	Most are retired, so risk is to retirement income, rather than jobs.
Family and Relationships	Mostly mature couples and older families. Less likely to have been alone during lockdown, May be thinking about effect of COVID-19 re older children (e.g. A Levels / university) and feeling the pressure of home schooling.	Friends and family always were important to this group. May be missing seeing grandparents, especially as younger children grow and change over the months. Schools and nurseries/childminders being closed will have had a big impact: lots of home schooling (e.g. using BBC bitesize resources).	Quite community minded. Don't have children at home, though may be missing children and grandchildren and other social interactions. Given that almost half are widowed, new rules re bubbles for single person households could make a big difference to this group.
Location and Environment	Often suburban and rural. Keen on gardening and DIY, which may have formed part of their lockdown activity.	Heart of suburbia: access to local parks, but playgrounds shut. Many have cars, so able to avoid public transport (and easier with children than cycling, esp. from suburbs).	Often in rural areas and small towns. Neighbourhood support groups may have been helpful. Generally 'home-lovers'.
Arts and Culture	Usually regular if not frequent. Skew towards heritage, so some sites of interest are open sooner than arts venues will be. Would miss panto if cancelled.	Usually like days out as a family. Popular arts - likely to have accessed more mainstream offers (rather than tracking down content re particular companies, for example). Disney+ launch may have been significant. Cancellation of outdoor arts events and festivals have affected them, as would cancellation of panto.	National Trust garden reopening may be a positive for this group, though may initially be being cautious about going out. English Heritage sites also important. Not very connected with much arts activity and less likely to engage online.
Digital and Streaming	Not typically big users of digital content channels, though have high take up of paid satellite/TV services and may have been doing more during lockdown. Unlikely to take out ongoing arts streaming subscriptions, due to more middling engagement levels, but may pay for one-offs.	Use wide range of devices/platforms, but hadn't previously used digital content by cultural organisations much. Likely users of local WhatsApp groups.	Generally a bit technophobic and less likely to use social networking sites. Will have been using email, phone and text mainly to keep in contact with people.

Importance of Arts	Not 'arty', but enjoy arts for entertainment, socialising and relaxing.	Not a priority, though moderately active: also keen on sports and shopping, which they may have been missing more. Arts may particularly have been a useful activity for children during lockdown.	Prefer activities like reading, gardening and DIY, which are more likely to have been a big part of their lockdown experience. Email lists from organisations can be a good way to keep them engaged
Risk	Given motivations, likely to be put off if arts attending is distanced, feels risky or is hard to relax.	Not particularly at risk, compared to older groups, though perhaps some concerns about children returning to school.	More likely to attend outdoor sites, re heritage and gardens, than indoor cultural events, given they are in a higher risk group. Some may take a more risk-tolerant view that 'it's important to enjoy the time we've got', especially if mitigated by staying relatively local. Others to be more risk averse re returning to theatres, museums and other venues.
Other	May have been missing watching sports. More likely to donate to heritage organisations but may be more hesitant in future due to the risks to their own income.	Likely to have rainbows in the window, made by children (although also true of several other segments with young children).	May have reinforced their preference for staying locally, rather than travelling too far.

Low Engagement Groups	Up Our Street	Facebook Families	Kaleidoscope Creativity	Heydays
Health and Wellbeing	Many are older (51-65) and with some health and mobility issues (44% with a long-term health condition).	Do some sports (e.g. dance or Zumba), perhaps switching to free online classes (or Joe Wicks).	Those in smaller council homes may have felt crowded during lockdown. Highest proportion of BAME people, who have had higher impact from Covid.	Many in this group are elderly (51% over 70, for example), and/or have long-term health conditions (60% with conditions that have lasted or are expected to last over 12 months), which often requires regular care/support and many will have been shielding. The group most vulnerable to the virus, and to have been in care homes.
Income and Employment	Average or below average incomes (95% under £25k), in trades and admin/customer services roles, so vulnerable to loss of incomes. Could include care-home staff.	Cash-strapped in normal times, this group are vulnerable to the effects of the recession, with children to support. Already live in areas with high unemployment. May include some lower-paid key workers.	Many already have low incomes or are unemployed and are vulnerable to the impact of the recession.	Most don't work or are retired, with relatively low retirement incomes. Small numbers of this group are students, who may have gone home.
Family and Relationships	Socialising important, which they will have been missing. Significant number of single households, which will benefit from the 'bubbling' rules. Few children in the household.	Family trips out are important and will have been missed. Lots have pets. Some large or extended families in this group: looking after children could have been a pressure during lockdown. Older members have often lived in the same place for a long time, so have community ties and support.	Often live in long-term, settled communities, which provide support. A third have children in the household.	69% are retired older singles. Risk of isolation and resulting depression and deterioration of health conditions. Changes to 'bubble' rules may help this group particularly, although many will still be shielding.
Location and Environment	Just outside towns and smaller cities in the North and Midlands.	Live in suburbs and on the edges of town, esp. in the Midlands and North. Some dependence on public transport, with related infection risks, and heavy reliance on local services.	City areas (nearly 50% in London), with many council tenants. Low car ownership and dependence on public transport.	Many live in specially adapted or sheltered accommodation, or are housing association tenants, on the edges of cities or suburbs.
Arts and Culture	Moderate engagement. Like outdoor festivals and carnivals, which could still be a good option, though may not be motivated back to indoor events as much. Do some home-based craft activities, which could have	Not a priority for many in this group. Some interest in free family offers and activities, especially those that are outdoors, in parks etc.	Already more interested in (free) outdoor and local events, festivals and carnivals etc. Lower engagement with ticketed events, esp. b/c of cost, but like a range of music. Prefer engagement away from	Least likely to engage in arts and culture. Outdoor leisure also likely to be difficult.

	been a lockdown occupation.		traditional institutions, which could be an opportunity when innovating re place and local engagement.	
Digital and Streaming	Don't tend to use the internet to access cultural organisations' sites.	Highest take-up of games consoles, which may have been a popular way of keeping occupied during lockdown. TV also important, esp. kids programmes. Have high uses of internet, esp. Facebook, accessing mainly through their phones.	Use online video etc a lot, but unlikely to feel that arts and cultural organisations' offers are 'for them', even if free (and with their high overall internet usage).	Most are not 'silver surfers' - and are unlikely to access online arts and cultural content, beyond TV.
Importance of Arts	Relatively low - more likely to spend spare time at home (e.g. TV, DIY, gardening). Fishing is quite popular and could be a suitable socially-distanced outdoor activity.	Low, although some do participatory activity, dance or digital creativity, e.g. animation/films on smartphones.	Despite many being creative, there's often a rejection of traditional provision as 'not for the likes of them'.	Lowest engagement and often think the arts are less important for them than they were (this may be a result of low accessibility, however).
Risk	Those in trades may have had to work when others didn't, but since vulnerable and not very engaged in arts and culture, are unlikely to engage much until it feels safe.	Generally younger and therefore less at risk, but those who live with older relatives may be more cautious as a result.	Being concentrated in cities may influence this group to feel that it's hard to avoid the virus and lower risk in any case. Those who are older and/or in BAME groups will have been at higher risk, as well as being more directly affected by Black Lives Matter.	This group is most vulnerable to the virus, but also to loneliness and isolation.
Other	Tend to be late adopters, so unlikely to be at the forefront of new approaches to engagement.	Any introduction of booked slots for attendance is likely to make it harder for this group to attend. Shifts towards more commercial offers are also likely to inhibit this group attending.	Most culturally diverse group (only 59% White British).	Awareness of accessibility needs (e.g. provision of captioning, signing, audio-description, hearing loops) are particularly important for this group.

For more information about Audience Spectrum types' behaviour and the impact of COVID-19-19, see the [Back Light](#) report on typical booking behaviours, and the [Power BI](#) dashboard, which allows a more interactive perspective on that data, as well as the overall [segment profiles](#).