About the Digital Audience Survey: Purpose & Methodology
May 2020:
Digital Audience Survey launched by TAA

August 2020:
1st wave results published
3,717 responses
79 orgs

November 2020:
2nd wave results published
6,852 responses
108 orgs

27th January 2021:
Introduction to...Digital Audience Insights event

January 2021:
Current sample
9,582 responses
239 orgs

April 2021
Final wave of first year results to be published

31st March 2021
End of current data collection
Digital Audience Survey Findings:
Who, what, why...
Website visitor demographics
Online audiences are more likely to:

- be White: 91% vs 89% (UK pop. 87%)
- be Older: 47% over 55 vs 44% (UK pop. 35%)
- be Female: 71% vs 64%
- have a Disability: 12% vs 9%
- live outside the UK: 15% vs 5%
Age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Gallery</th>
<th>Performing Arts</th>
<th>Museum &amp; Heritage</th>
<th>Digital Audience Survey - Nov 20</th>
<th>UK Adults 15+ estimate 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>16 - 24 years</td>
<td>7%</td>
<td>15%</td>
<td>16%</td>
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<tr>
<td>25 - 34 years</td>
<td>11%</td>
<td>14%</td>
<td>16%</td>
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<tr>
<td>35 - 44 years</td>
<td>15%</td>
<td>15%</td>
<td>17%</td>
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<tr>
<td>45 - 54 years</td>
<td>17%</td>
<td>20%</td>
<td>17%</td>
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<tr>
<td>55 - 64 years</td>
<td>24%</td>
<td>14%</td>
<td>24%</td>
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<tr>
<td>65 or more years</td>
<td>23%</td>
<td>20%</td>
<td>20%</td>
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</tbody>
</table>

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the audience agency
Age

<table>
<thead>
<tr>
<th>Age Range</th>
<th>16 - 24</th>
<th>25 - 34</th>
<th>35 - 44</th>
<th>45 - 54</th>
<th>55 - 64</th>
<th>65 or more</th>
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<td>8%</td>
<td>9%</td>
<td>11%</td>
<td>14%</td>
<td>21%</td>
<td>25%</td>
</tr>
<tr>
<td>Performing Arts</td>
<td>7%</td>
<td>11%</td>
<td>15%</td>
<td>20%</td>
<td>24%</td>
<td>23%</td>
</tr>
<tr>
<td>Museum &amp; Heritage</td>
<td>9%</td>
<td>14%</td>
<td>15%</td>
<td>20%</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>Digital Audience Survey - Nov 20</td>
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<tr>
<td>UK Adults 15+ estimate 2018</td>
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</tbody>
</table>
Ethnicity

UK population: 87%, 2%, 7%, 3%, 1% respectively (2018 figures)
Disability

UK population: 21% (2018/19 figures)

### Audience Engagement across Sectors

- **Gallery**: 11% identify as disabled, 89% do not identify as disabled
- **Museum & Heritage**: 18% identify as disabled, 82% do not identify as disabled
- **Performing Arts**: 11% identify as disabled, 89% do not identify as disabled
- **Digital Audience Survey - Nov 20**: 12% identify as disabled, 88% do not identify as disabled
- **Audience Finder 2018/19**: 9% identify as disabled, 91% do not identify as disabled

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UK population: 21% (2018/19 figures)
Living in the UK/overseas

- Gallery: 81% Lives in the UK, 19% Lives elsewhere
- Museum & Heritage: 87% Lives in the UK, 13% Lives elsewhere
- Performing Arts: 80% Lives in the UK, 20% Lives elsewhere
- Digital Audience Survey - Nov 20: 85% Lives in the UK, 15% Lives elsewhere
- Audience Finder 2018/19: 95% Lives in the UK, 5% Lives elsewhere
Levels of cultural engagement (by Audience Spectrum)

- Gallery: 53% High engagement, 34% Medium engagement, 13% Low engagement
- Museum & Heritage: 52% High engagement, 27% Medium engagement, 21% Low engagement
- Performing Arts: 43% High engagement, 39% Medium engagement, 18% Low engagement
- Digital Audience Survey - Nov 20: 44% High engagement, 39% Medium engagement, 17% Low engagement
Frequency of visits
Around 1 in 4 visit once a week or more

- Most days
- At least once a week
- At least once a month
- At least every two to three months
- At least once a year
- This is my first time

*n = 6,321 Digital Audience Survey Nov 20*

Question: On average, how often do you visit our website or social media platforms to watch/read our digital content?
Around 1 in 4 visit once a week or more, with a third being first timers.

- Returning visitor: 66%
- First time web visitor: 34%

n = 6,321 Digital Audience Survey Nov 20
n = 3,607 Digital Audience Survey Aug 20

Question: On average, how often do you visit our website or social media platforms to watch/read our digital content?
Around 1 in 4 visit once a week or more, with a third being first timers.

Increase in first time web visitors since Aug 20

- Digital Audience Survey Nov 20: 66% returning visitors, 34% first time web visitors
- Digital Audience Survey Aug 20: 73% returning visitors, 27% first time web visitors

$n = 6,321$ Digital Audience Survey Nov 20
$n = 3,607$ Digital Audience Survey Aug 20

Question: On average, how often do you visit our website or social media platforms to watch/read our digital content?
Who are those who visit ‘Most days’?

- Most days: 34%
- At least once a week: 15%
- At least once a month: 15%
- At least every two to three months: 14%
- At least once a year: 10%
- This is my first time: 12%

n = 6,321 Digital Audience Survey Nov 20
Question: On average, how often do you visit our website or social media platforms to watch/read our digital content?
Who are those who visit ‘Most days’?

74% freq. increased cf. pre-COVID
(44% ‘significantly’; 25% ‘about the same’)
45% visited in last 12 months; 40% never
More likely to be sharing opinions,
conducting research or investigating membership

Question: On average, how often do you visit our website or social media platforms to watch/read our digital content?

n = 6,321 Digital Audience Survey Nov 20
Who are those who are visiting ‘For the first time’?

10% visited in last 12 months; 75% never
1.5x more likely to be 16-19 than overall
(over half of this group)
More likely to be looking to get info on
digital events/content or to make a
donation

- Most days
- At least once a week
- At least once a month
- At least every two to three months
- At least once a year
- This is my first time

n = 6,321 Digital Audience Survey Nov 20
Question: On average, how often do you visit our website or social media platforms to watch/read our digital content?
Who are those who visit ‘Most days’/‘For the first time’?
Who are those who visit ‘Most days’ / ‘For the first time’?
Around 1 in 3 are recent in-person attenders

- 37% In the last 12 months
- 41% Between one and two years ago
- 10% Between two and three years ago
- 5% Between three and five years ago
- 4% More than five years ago
- 3% I haven’t visited in person/physically attended an event before

n = 6,444 Digital Audience Survey Nov 20
Question: When did you last visit us in person/physically attend one of our events?
Around 1 in 3 are recent in-person attenders, while 41% have never attended in-person.
...and more in-person = more online

<table>
<thead>
<tr>
<th>Visitor Type</th>
<th>Visited in past 12 months</th>
<th>Visited between 1-2 years ago</th>
<th>Last visited more than 2 years ago</th>
<th>Non-attender</th>
</tr>
</thead>
<tbody>
<tr>
<td>First time website visitor</td>
<td>10%</td>
<td>5%</td>
<td>11%</td>
<td>74%</td>
</tr>
<tr>
<td>Low frequency website visitor</td>
<td>30%</td>
<td>18%</td>
<td>21%</td>
<td>32%</td>
</tr>
<tr>
<td>Medium frequency website visitor</td>
<td>52%</td>
<td>16%</td>
<td>11%</td>
<td>20%</td>
</tr>
<tr>
<td>High frequency website visitor</td>
<td>55%</td>
<td>9%</td>
<td>8%</td>
<td>27%</td>
</tr>
</tbody>
</table>

n = 6,247 Digital Audience Survey Nov 20
Question: When did you last visit us in person/physically attend one of our events?
Motivations and actions
Visitors are motivated intellectually

Question: Which of the following describe your motivations for visiting our website or social media platforms?

- To learn something: 48% (Nov 20: 56%) 48% (Aug 20)
- To be intellectually stimulated: 44% (Nov 20) 44% (Aug 20)
- To be inspired: 45% (Nov 20) 46% (Aug 20)
- To discover something new/out of the ordinary: 45% (Nov 20) 45% (Aug 20)
- To be entertained: 38% (Nov 20) 57% (Aug 20)
- For professional reasons: 22% (Nov 20) 21% (Aug 20)
- For reflection: 21% (Nov 20) 22% (Aug 20)
- For academic reasons: 18% (Nov 20) 21% (Aug 20)
- For escapism: 18% (Nov 20) 17% (Aug 20)
- To educate/stimulate my children: 6% (Nov 20) 4% (Aug 20)
- To entertain my children: 4% (Nov 20) 6% (Aug 20)
- Other: 5% (Nov 20) 5% (Aug 20)
Visitors are motivated intellectually but also for entertainment.

*Digital Audience Survey Nov 20*
*n = 4,419*

*Digital Audience Survey Aug 20*
*n = 2,519*

Question: Which of the following describe your motivations for visiting our website or social media platforms?

- To learn something: 56%
- To be intellectually stimulated: 48%
- To be inspired: 45%
- To discover something new/out of the ordinary: 46%
- To be entertained: 57%
- For professional reasons: 22%
- For reflection: 21%
- For academic reasons: 18%
- For escapism: 17%
- To educate/stimulate my children: 6%
- To entertain my children: 4%
- Other: 5%
Visitors are motivated intellectually but also for entertainment.

Though decreased since Aug 20

Question: Which of the following describe your motivations for visiting our website or social media platforms??
Visitors are motivated intellectually but also for entertainment.

% Want to be Entertained, be Intellectually Stimulated or Learn Something

- May: 50%
- June: 43%
- July: 38%
- August: 33%
- September: 30%
- October: 36%

n = 4,419 Digital Audience Survey Nov 20
n = 2,519 Digital Audience Survey Aug 20

Question: Which of the following describe your motivations for visiting our website or social media platforms?
Visitors are motivated intellectually but also for entertainment and emotions.

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**‘I am engaging... to boost my mood’**

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neither agree nor disagree</th>
<th>Disagree</th>
<th>Disagree strongly</th>
</tr>
</thead>
<tbody>
<tr>
<td>14%</td>
<td>43%</td>
<td>26%</td>
<td>13%</td>
<td>4%</td>
</tr>
</tbody>
</table>

- 58% vs 16%

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**‘I am engaging... to reduce stress/anxiety’**

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neither agree nor disagree</th>
<th>Disagree</th>
<th>Disagree strongly</th>
</tr>
</thead>
<tbody>
<tr>
<td>10%</td>
<td>27%</td>
<td>33%</td>
<td>23%</td>
<td>7%</td>
</tr>
</tbody>
</table>

- 37% vs 30%

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n = 6,281 / 6,165  Digital Audience Survey Nov 20
Visitors are motivated intellectually but also for entertainment and emotions.

Highest for 16 – 24 and 25 – 34 age groups

‘I am engaging... to reduce stress/anxiety’

- Overall: 37% vs 30%
- 25 - 34: 54% vs 19%
- 16 - 24: 52% vs 20%

n = 6,165 / 669 / 418 Digital Audience Survey Nov 2020
Visitors are motivated intellectually but also for entertainment and emotions.

Highest for lower culturally engaged:

'I am engaging... to reduce stress/anxiety'

<table>
<thead>
<tr>
<th>Engagement Level</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neither Agree Nor Disagree</th>
<th>Disagree</th>
<th>Disagree Strongly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>10%</td>
<td>27%</td>
<td>33%</td>
<td>23%</td>
<td>7%</td>
</tr>
<tr>
<td>High Engagement</td>
<td>8%</td>
<td>28%</td>
<td>32%</td>
<td>25%</td>
<td>8%</td>
</tr>
<tr>
<td>Medium Engagement</td>
<td>8%</td>
<td>29%</td>
<td>34%</td>
<td>22%</td>
<td>7%</td>
</tr>
<tr>
<td>Low Engagement</td>
<td>15%</td>
<td>30%</td>
<td>30%</td>
<td>19%</td>
<td>6%</td>
</tr>
</tbody>
</table>

n = 6,165 / 1,647 / 1,488 / 643 Digital Audience Survey Nov 20
Visitors are motivated intellectually but also for entertainment and emotions.

Highest for 16 – 24 and 25 – 34 age groups

‘I am engaging... to boost my mood’

- Overall: 58% vs 16%
- 25 - 34: 70% vs 12%
- 16 - 24: 65% vs 10%
Visitors are motivated intellectually but also for entertainment and emotions.
Differences by art form / sector
Gallery website visitors are more likely... *(vs overall)*

To be a first time web visitor (49% vs 34%): of which 80% have never physically attended the organisations (vs. 74%)

To be from Black, Asian and other minority ethnicities*(11% vs 9%)*

To be highly culturally engaged (53% vs 44%)

To purchase a ticket or something from the online shop (18% vs. 11%)

*The sample size is currently not large enough to differentiate the proportions from more specific groups.*
Performing Arts website visitors are more likely... (vs overall)

To be a return web visitor (80% vs 66%)
To be from a balance of age groups, reflecting the UK population
To engage...to boost my mood (65% agree vs 58%)
To view more online...than before Covid (68% agree vs 61%)
To view a video or live stream (45% vs 26%)
To donate to the organisation (4% vs 2%)

the audience agency
Museum & Heritage website visitors are more likely... (vs overall)

To be a return web visitor (80% vs 66%)
To have increased frequency of visits since Covid (66% vs 58%)
To be aged 55 or over (54% vs. 47%)
To identify as disabled (18% vs 12%)
To be medium culturally engaged (52% vs 39%)
To 'see something...I am unable to see in-person' (29% vs 22%)
First time/returning web visitor

<table>
<thead>
<tr>
<th>Category</th>
<th>Returning Visitor</th>
<th>First time web visitor</th>
</tr>
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<tbody>
<tr>
<td>Digital Audience</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>Survey Nov 20</td>
<td></td>
<td></td>
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<tr>
<td>Gallery</td>
<td>51%</td>
<td>49%</td>
</tr>
<tr>
<td>Museum &amp; Heritage</td>
<td>80%</td>
<td>20%</td>
</tr>
<tr>
<td>Performing Arts</td>
<td>80%</td>
<td>20%</td>
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*the audience agency*
### Motivation

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<th>20%</th>
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<th>50%</th>
<th>60%</th>
<th>70%</th>
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<tbody>
<tr>
<td>To learn something</td>
<td>47%</td>
<td>51%</td>
<td>52%</td>
<td>47%</td>
<td>47%</td>
<td>57%</td>
<td>59%</td>
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<tr>
<td>To be intellectually stimulated</td>
<td>39%</td>
<td>43%</td>
<td>44%</td>
<td>53%</td>
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<tr>
<td>To be inspired</td>
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<td>24%</td>
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<tr>
<td>For professional reasons</td>
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<td>For reflection</td>
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<tr>
<td>For escapism</td>
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<td>18%</td>
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<tr>
<td>For academic reasons</td>
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<tr>
<td>To educate/stimulate my children</td>
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<td>Other</td>
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### Activity

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<th>35%</th>
<th>40%</th>
<th>45%</th>
<th>50%</th>
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</thead>
<tbody>
<tr>
<td>Get information on digital events/content</td>
<td>23%</td>
<td>24%</td>
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<tr>
<td>View a video or live stream</td>
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<td>45%</td>
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</tr>
<tr>
<td>Browse virtual art/media archives</td>
<td>16%</td>
<td>16%</td>
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<td>35%</td>
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</tr>
<tr>
<td>See something online that I am unable to see in person</td>
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<td>19%</td>
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<td>29%</td>
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<tr>
<td>Get updates about events I had planned to see in person</td>
<td>15%</td>
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<tr>
<td>Conduct research</td>
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</tr>
<tr>
<td>Find out more about the organisation</td>
<td>11%</td>
<td>11%</td>
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<tr>
<td>Purchase a ticket or something from the online shop</td>
<td>11%</td>
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<tr>
<td>Interact with the organisation and/or artists</td>
<td>11%</td>
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<tr>
<td>Use or download an image</td>
<td>11%</td>
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</tr>
<tr>
<td>Share my opinions/ideas</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
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<tr>
<td>Find out about membership</td>
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<td>Donate to the organisation</td>
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<td>Something else</td>
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</tbody>
</table>

The audience agency
‘Engaging…to boost my mood’.

- **Gallery**
  - Strongly agree: 13%
  - Agree: 40%
  - Neither agree nor disagree: 28%
  - Disagree: 15%
  - Disagree strongly: 4%
  - Total: 53% vs 19%

- **Museum & Heritage**
  - Strongly agree: 13%
  - Agree: 42%
  - Neither agree nor disagree: 29%
  - Disagree: 11%
  - Disagree strongly: 5%
  - Total: 55% vs 16%

- **Performing Arts**
  - Strongly agree: 19%
  - Agree: 46%
  - Neither agree nor disagree: 22%
  - Disagree: 9%
  - Disagree strongly: 3%
  - Total: 65% vs 12%

- **Digital Audience Survey - Nov 20**
  - Strongly agree: 14%
  - Agree: 43%
  - Neither agree nor disagree: 26%
  - Disagree: 13%
  - Disagree strongly: 4%
  - Total: 58% vs 16%
‘Viewing more online...than before Covid’.

- **Gallery**
  - Strongly agree: 19%
  - Agree: 37%
  - Neither agree nor disagree: 24%
  - Disagree: 16%
  - Disagree strongly: 5%
  - 56% vs 21%

- **Museum & Heritage**
  - Strongly agree: 22%
  - Agree: 42%
  - Neither agree nor disagree: 22%
  - Disagree: 11%
  - Disagree strongly: 3%
  - 64% vs 14%

- **Performing Arts**
  - Strongly agree: 29%
  - Agree: 39%
  - Neither agree nor disagree: 16%
  - Disagree: 12%
  - Disagree strongly: 4%
  - 68% vs 16%

- **Digital Audience Survey - Nov 20**
  - Strongly agree: 23%
  - Agree: 39%
  - Neither agree nor disagree: 21%
  - Disagree: 14%
  - Disagree strongly: 4%
  - 61% vs 18%
Change in frequency of [digital] visits since Covid

- **Gallery**: 19% significantly increased, 35% somewhat increased, 40% about the same, 4% decreased, 1% significantly decreased
- **Museum & Heritage**: 33% significantly increased, 33% somewhat increased, 31% about the same, 2% decreased, 1% significantly decreased
- **Performing Arts**: 31% increased significantly, 32% increased somewhat, 28% about the same, 7% decreased, 3% decreased significantly
- **Digital Audience Survey - Nov 20**: 23% increased significantly, 35% increased somewhat, 35% about the same, 5% decreased, 2% decreased significantly
In Summary...
In Summary...

Profiles:
Inc. age and engagement levels

Different engagement patterns:
Frequency (linked to engagement / very different audiences)

Motivations and uses:
Esp. importance of emotion (for young / lower engaged groups)

Differences by sector for all of these...

So...

Differentiate & target
• for different audiences (behaviour, uses, profile)
• overlooked opportunities?
• cf. others

Consider the emotional experience
Link to wider experiences by group