



CULTURE + COMMUNITY IN A TIME OF CRISIS

A SPECIAL EDITION OF
CULTURE TRACK[®]

LaPlaca
Cohen

sloverlinett
AUDIENCE RESEARCH

Key Findings from Wave 1 | July 7, 2020

Table of Contents

1

A Note from the Authors

Research methodology and reflections on the cultural sector.

3

2

A Time of Crisis

A snapshot of COVID-19's physical, financial, and emotional impact.

8

3

Life Goes On...line

Creativity and digital cultural behaviors during life in isolation.

13

4

When We Come Back

Actions that can help draw audiences back when reopening cultural experiences.

21

5

A Community Mandate

Public perception of organizations through the pandemic and desires for future change.

27

6

In Conclusion

Closing remarks and key implications.

32

A Note from the Authors

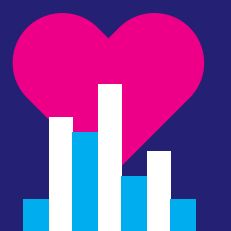
Culture Track is a national online survey of audience behaviors, attitudes, motivations, and barriers to cultural participation, which has been conducted by LaPlaca Cohen since 2001.

Culture & Community in a Time of Crisis: A Special Edition of Culture Track is a new collaboration between LaPlaca Cohen and Slover Linett Audience Research, generously supported by The Wallace Foundation and The Barr Foundation with additional funding from The Terra Foundation for American Art and Art Bridges, along with other partners and collaborators (p. 37). The study aims to shed light on how arts and culture organizations can address the hopes, fears, and needs of Americans during and following the COVID-19 pandemic.

This report offers early findings from the first wave of this national survey, fielded from April 29 to May 19, 2020, which became one of the largest arts and culture studies ever undertaken in the U.S. We offer these key insights to the field at a time of urgent need and will release deeper-dive interpretations and implications in late July.

We are currently planning to field the second wave of this study in September 2020, which will delve into key topics we've interrogated with cultural practitioners, funders, and policymakers, including racial representation and the role of culture in social justice; how technology can meet audience needs and encourage participation; attitudes towards re-entry; and social and behavioral dynamics in reopened spaces.

124K RESPONDENTS
from April 29 – May 19, 2020



This report includes US data only but further analysis may include international audiences who completed the survey.

Our Approach

As the pandemic upends not only the arts and culture sector but society at large, we intend for this survey to reflect the experiences and responses of all Americans, not just those who were actively participating in cultural activities before the crisis.

We took a two-pronged approach: inviting cultural organizations from across the country to send the survey to their email lists; and working with the NORC AmeriSpeak panel to survey 2,000 adults who are representative of the broad demographic diversity of the U.S. population. This allowed us to hear from an audience already invested in cultural organizations, as well as a population with a wider relationship to arts and culture.

124K Respondents

2K

Sample from
NORC's AmeriSpeak panel
representative of the
U.S. general population*



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

122K

Sample from
653 Participating Organizations
representative of the
mailing lists of arts
and culture organizations

653 Cultural Organizations

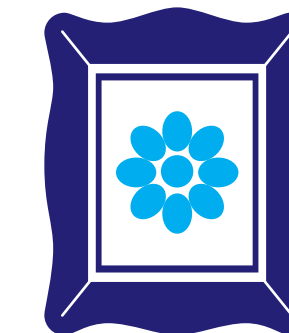
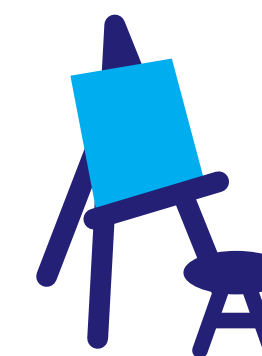


336

**Museums and
Collections****

285

**Performing
Arts*****



25

**Arts Schools
and Services**

4

**Visual Arts and
Photography******

3

**Film, Radio,
and Television**

7% of orgs are part of a higher education organization

***Includes Zoos, Aquaria, Historic Societies, Botanical Gardens/Arboretums.*

****Includes Music, Theater, Dance, Opera, Performers, Services/Facilities.*

*****Includes Crafts and Services.*

The cultural sector has an inclusion problem.

Many past research studies have shown that U.S. arts and culture audiences are disproportionately white, older, more affluent, and more highly educated. Still, the stark gaps in representation in our large national dataset are striking.

Despite widespread participation from arts and culture organizations of all sizes and disciplines, the survey not only confirms but further illustrates the huge racial disparity in cultural audience composition, and the work ahead for the sector. We cannot continue to look only at narrowly defined “arts attenders” for insight into the future and sustainability of the field. Our future is, and must be, increasingly inclusive.

Figures throughout the report are rounded to the nearest tenth of a percent. Charts depicting single select questions may not equal 100% due to rounding.

For more details on weighting and methodology, please visit www.culturetrack.com/covidstudy

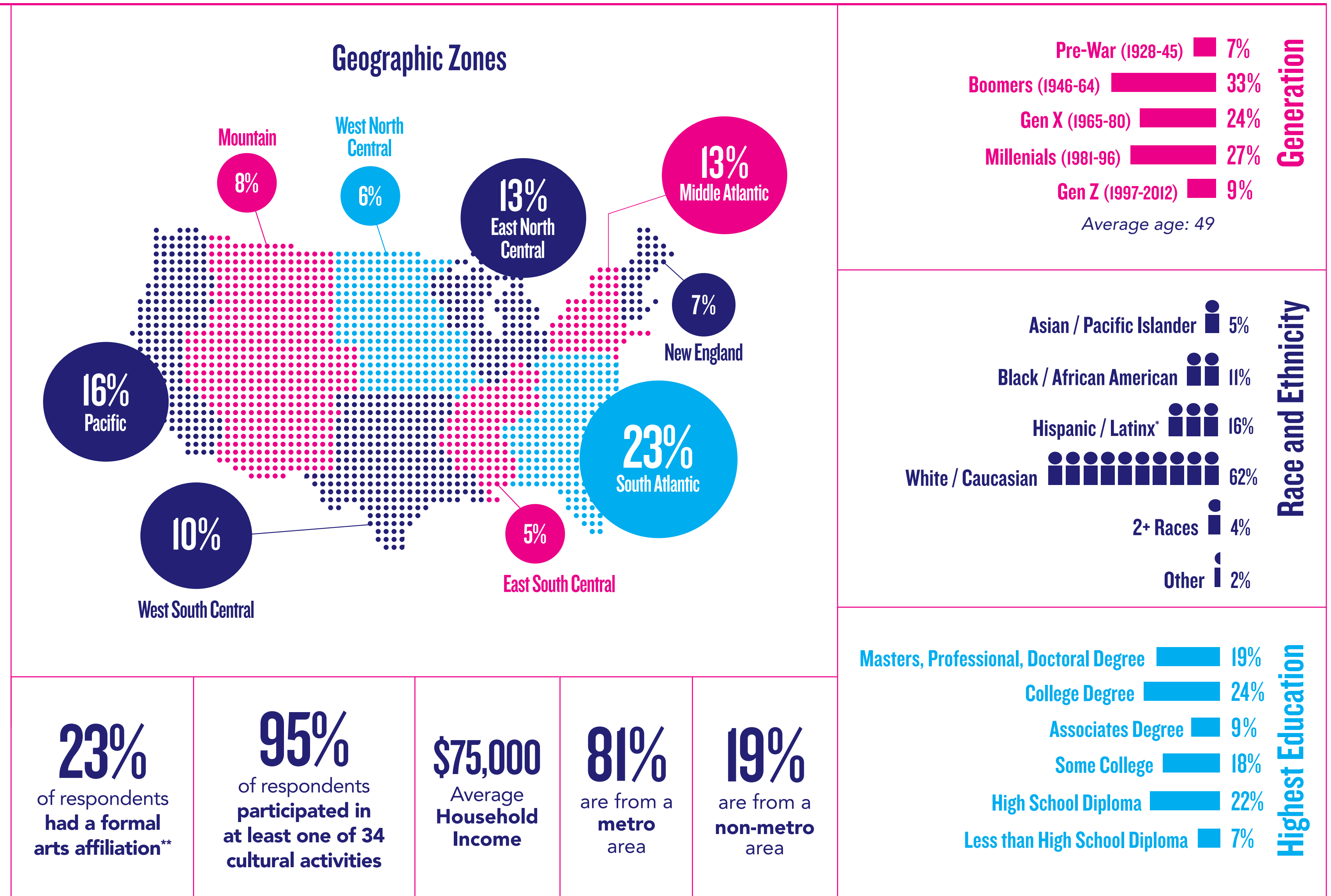
| | Organization List Respondents* (unweighted) | U.S. Adult Population | Representation Gap (before weighting) |
|---------------------------|---|-----------------------|---------------------------------------|
| White/Caucasian | 85% | 63% | +22% |
| Hispanic/Latinx | 5% | 16% | -11% |
| Black/African American | 3% | 12% | -9% |
| Asian or Pacific Islander | 4% | 6% | -2% |
| Native American | <1% | 1% | -1% |
| Two or More Races | 2% | 2% | none |

**Data from the 653 participating organizations' respondents.*

A National Portrait

To balance the general population and organization list respondents for analysis and comparison, we statistically weighted the data to reflect actual U.S. demographics. That meant increasing the strength of Black/African American and Hispanic/Latinx voices among others in the sample.

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



*Includes all with Hispanic ethnicity, regardless of race. All other groups are non-Hispanic.

**Were members, subscribers, volunteers, artists, or employees of cultural organizations.

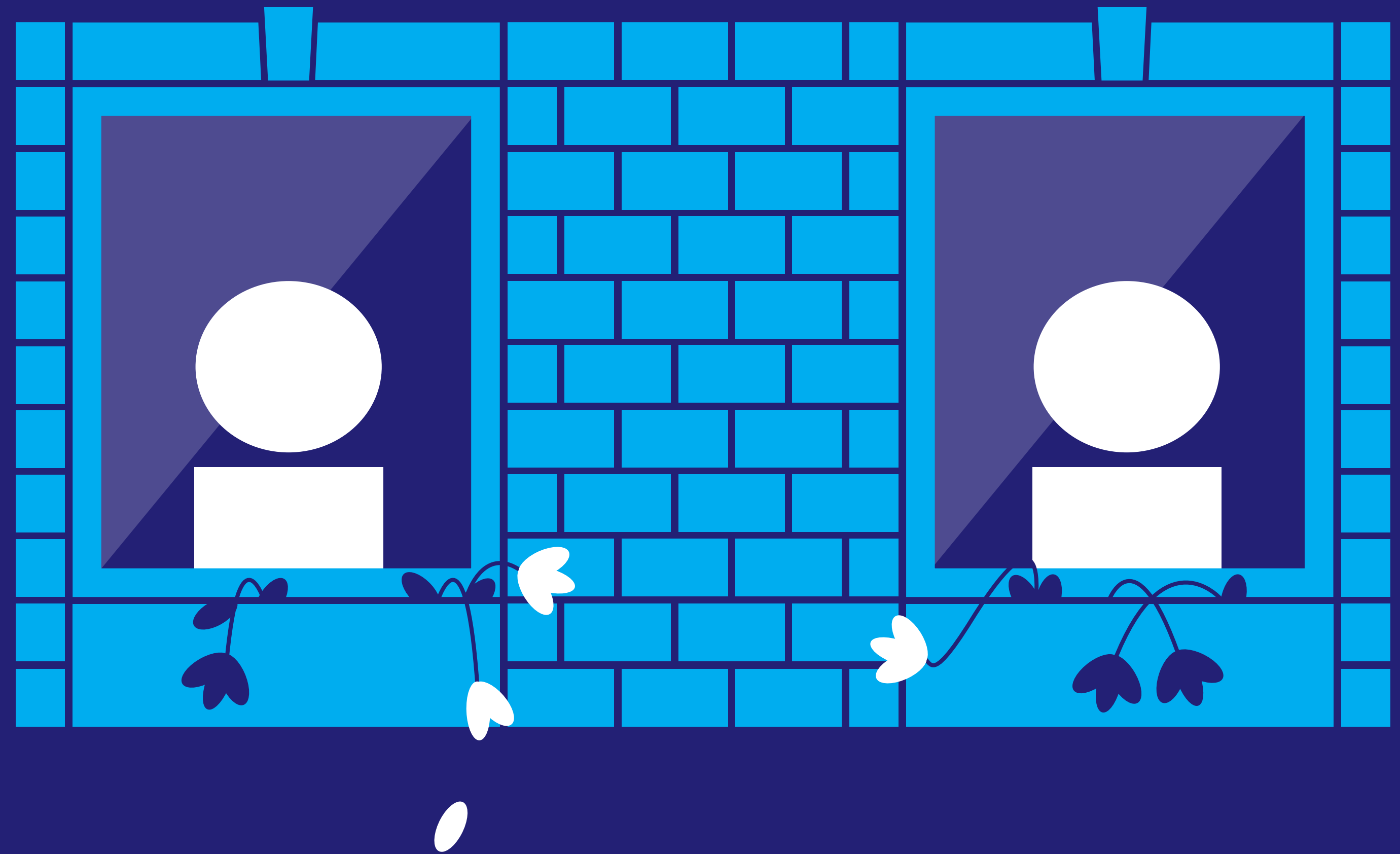
Our goal is to inform the national dialogue about progress, relevance, and genuine equity in the cultural sector.

The data analysis for this study is an ongoing process. We will provide further breakdowns of the relationships among various demographic and geographic factors in late July. We're also redoubling our efforts to amplify Black, Indigenous, and People of Color (BIPOC) voices and experiences through the in-depth qualitative research we'll be conducting this summer, and to include more respondents from cultural and civic organizations serving communities of color in the second wave of the online survey, which will be fielded in September 2020.

Though we collected our initial data before renewed protests for racial justice swept across the country, the data in this report raises urgent questions about the standing of arts and culture organizations in the current struggle for social—and cultural—transformation.

A Time of Crisis

To understand where culture fits into respondents' lives, it's important to know what they are going through. The pandemic's devastating impact leaves large segments exposed to COVID-19, out of work, and feeling disconnected and on edge. People of color are disproportionately experiencing the physical and financial brunt of the crisis.



The Impact at a Glance

79% report they were under a stay at home order or voluntarily quarantining.

1/3 report they were caring for children at home.

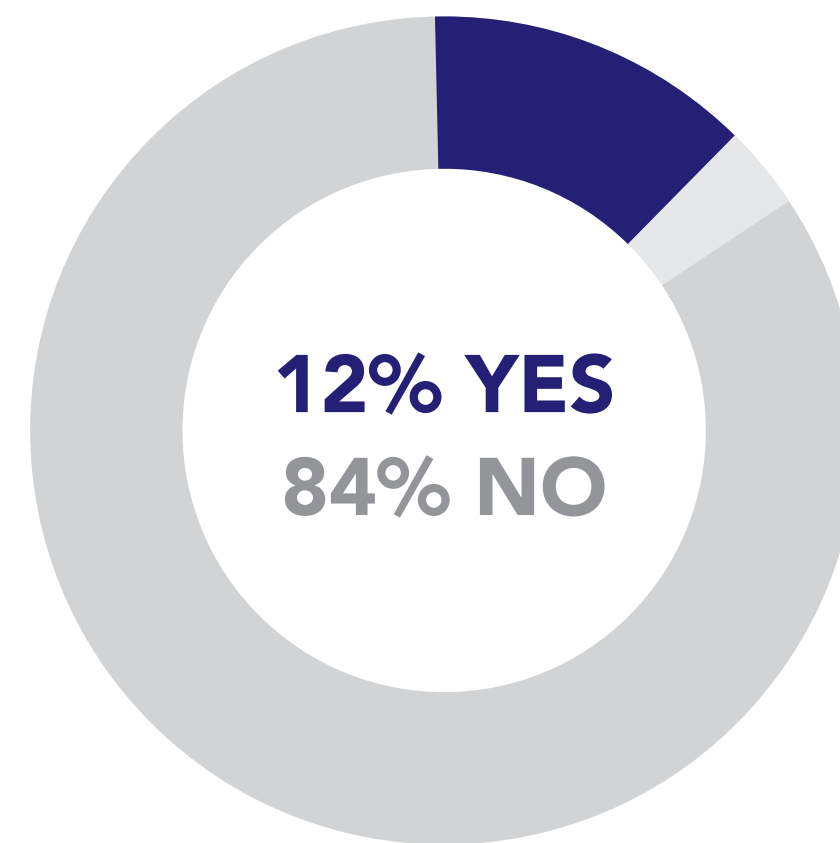
The survey closed on May 19, 2020.

Q

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

PHYSICAL IMPACT OVERVIEW

12% report that they, a family member, or close friend were sick due to COVID-19.



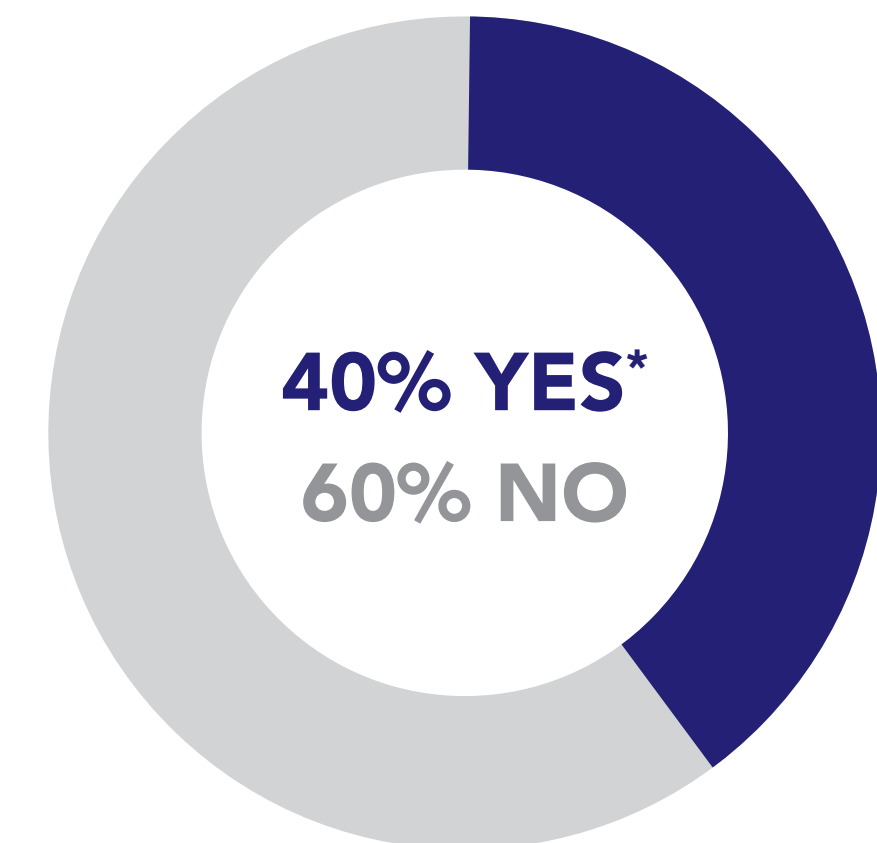
Lightest gray indicates respondents who answered "Not sure."

Q

Has your income changed because of COVID-19? Please check one.

FINANCIAL IMPACT OVERVIEW

4 out of 10 report a reduction in income.



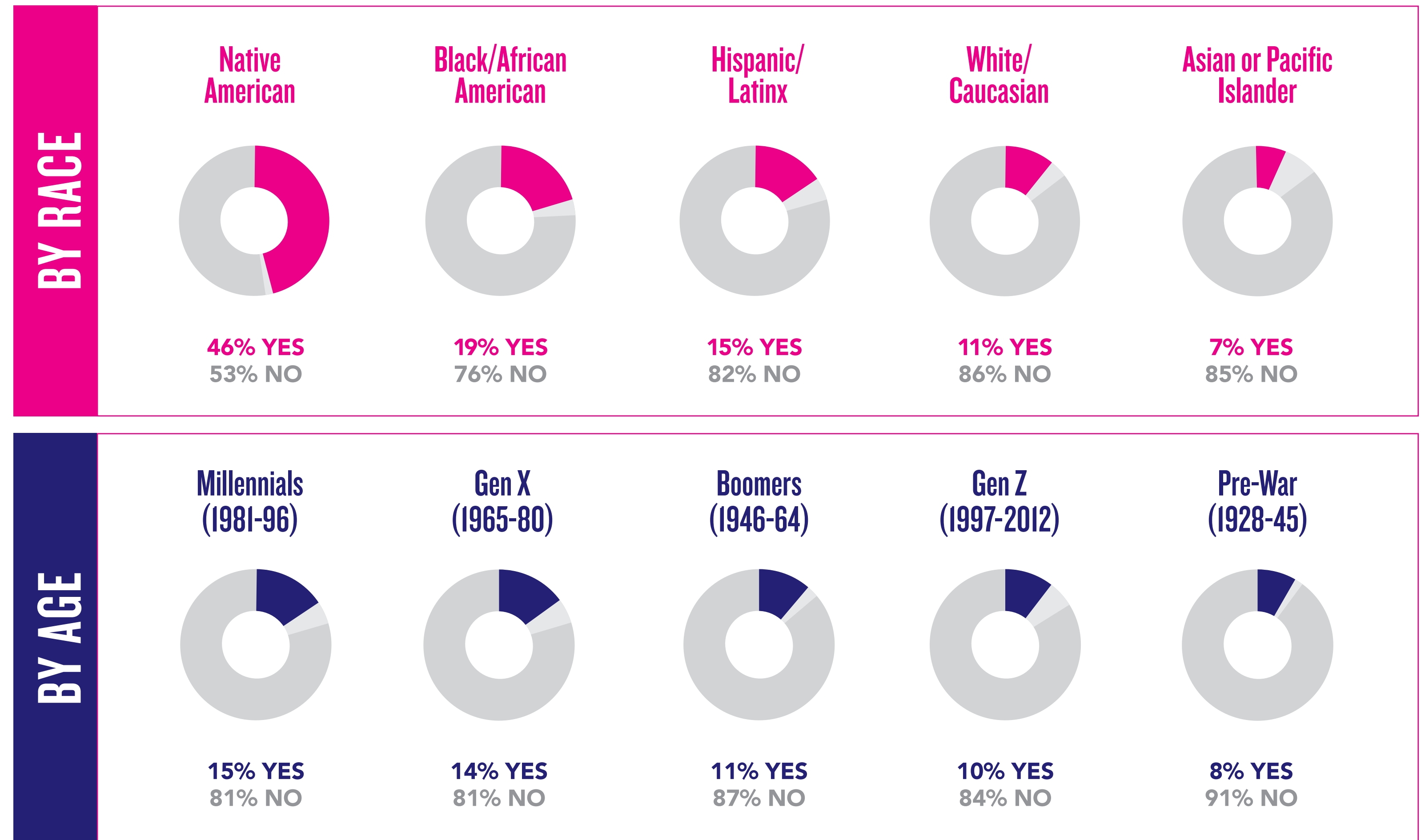
*Includes "Yes, I have no income now" and "Yes, I still have some income but less than before."

Proximity to COVID-19

The virus impacts Native Americans and African Americans more than any other group.



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



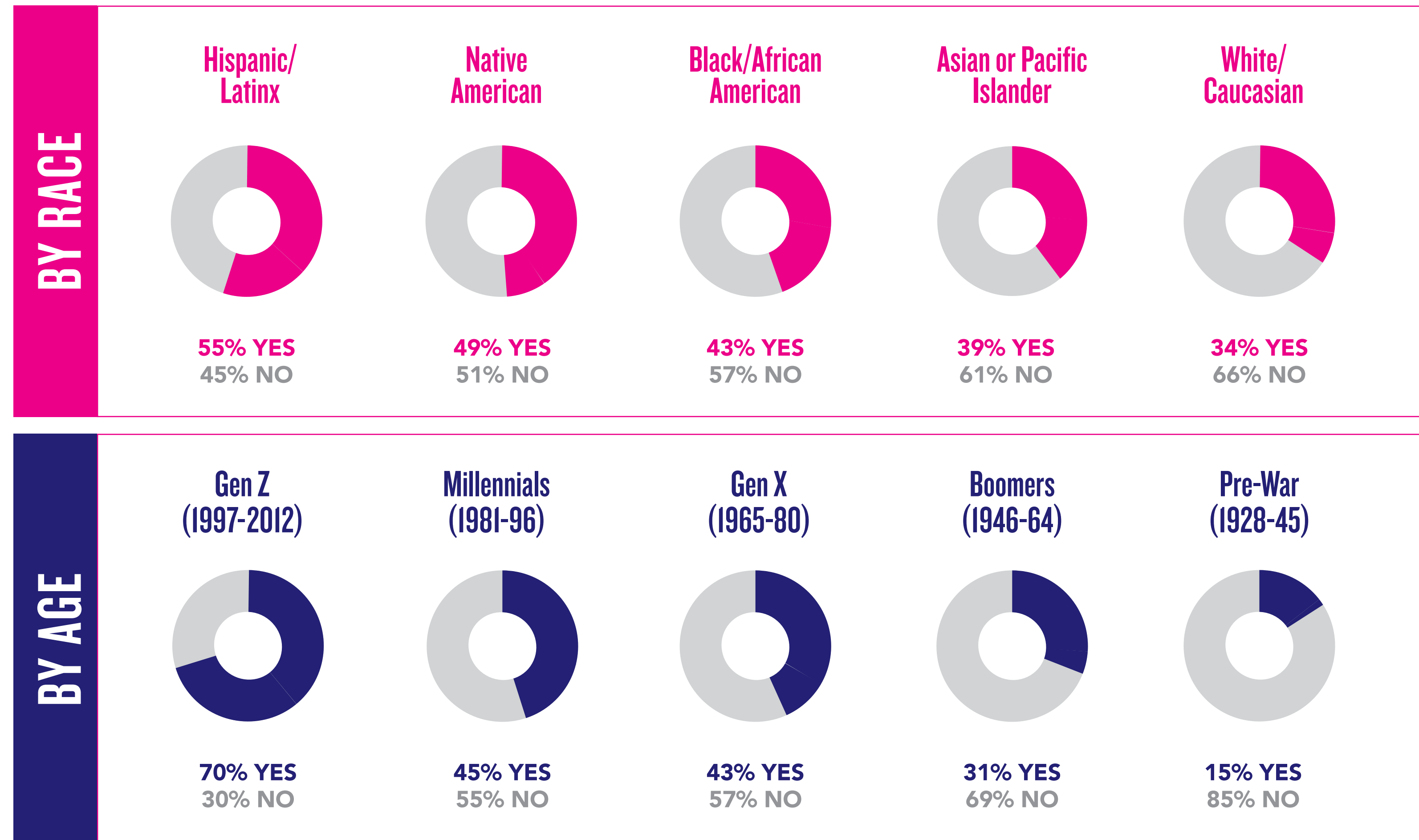
Lightest gray indicates respondents who answered "Not sure."
Charts are listed in descending order of impact.

Financial Impact Due to COVID-19



Has your income changed because of COVID-19?

Economic losses fall harder on younger generations and people of color.



YES includes "Yes, I have no income now" and "Yes, I still have some income but less than before."

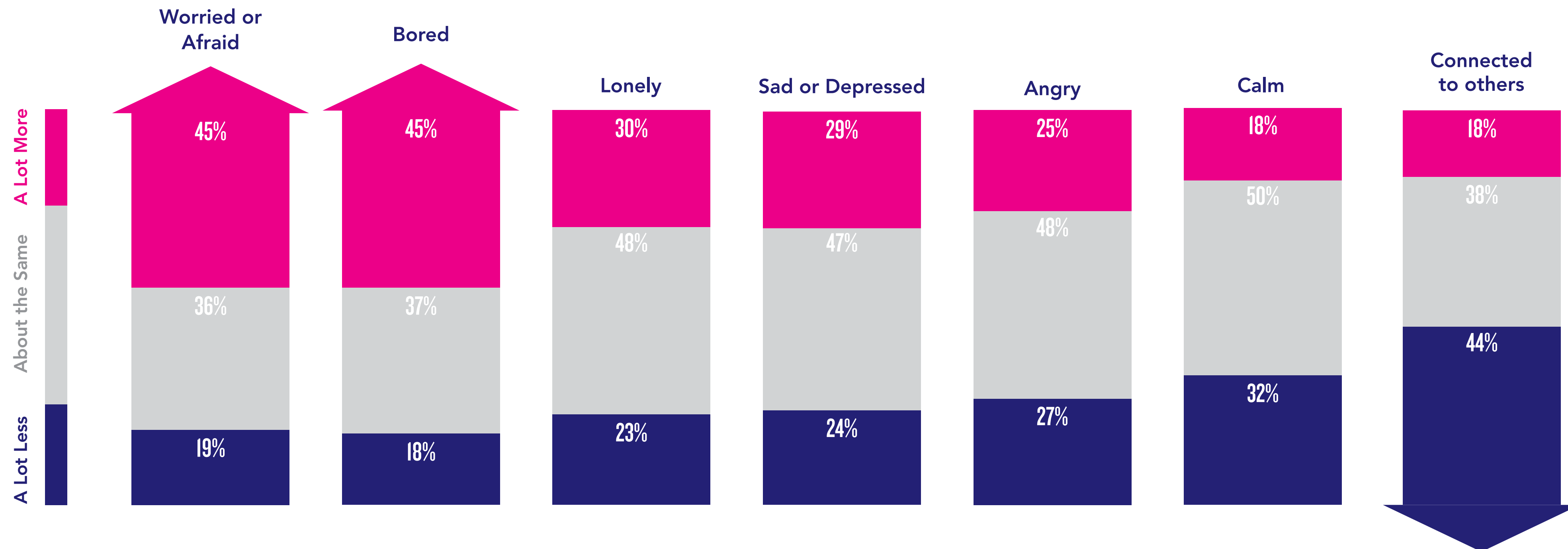
Charts are listed in descending order of impact.

The Emotional Toll

Q

People are having different reactions to the current situation. Compared to before the pandemic began, how are you feeling these days? Please select one answer for each feeling.

Respondents report rising feelings of worry, boredom, and disconnection.



Five point scale: top two responses and bottom two responses are combined.

Arrows indicate where the percentage of respondents selecting "A Lot More" or "A Lot Less" exceeds "About the Same."

Life Goes On...line

Respondents under quarantine tap into their creative side and seek connection and distraction both online and off. Many interact virtually with organizations they did not visit in person before the pandemic.

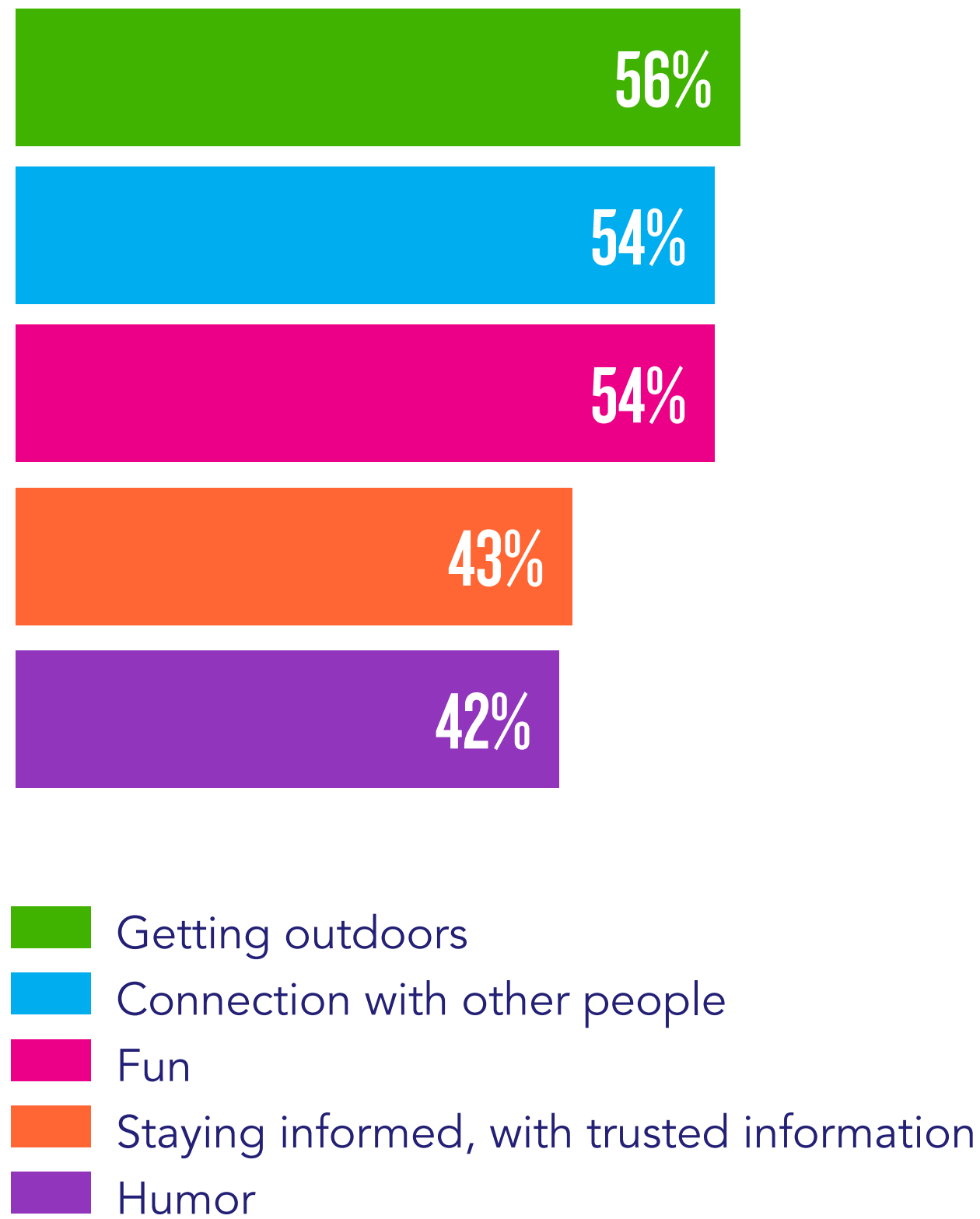


Missing Connections

After getting outside, respondents want more connection and fun in their lives—needs that align with what they miss most from cultural experiences.

Q

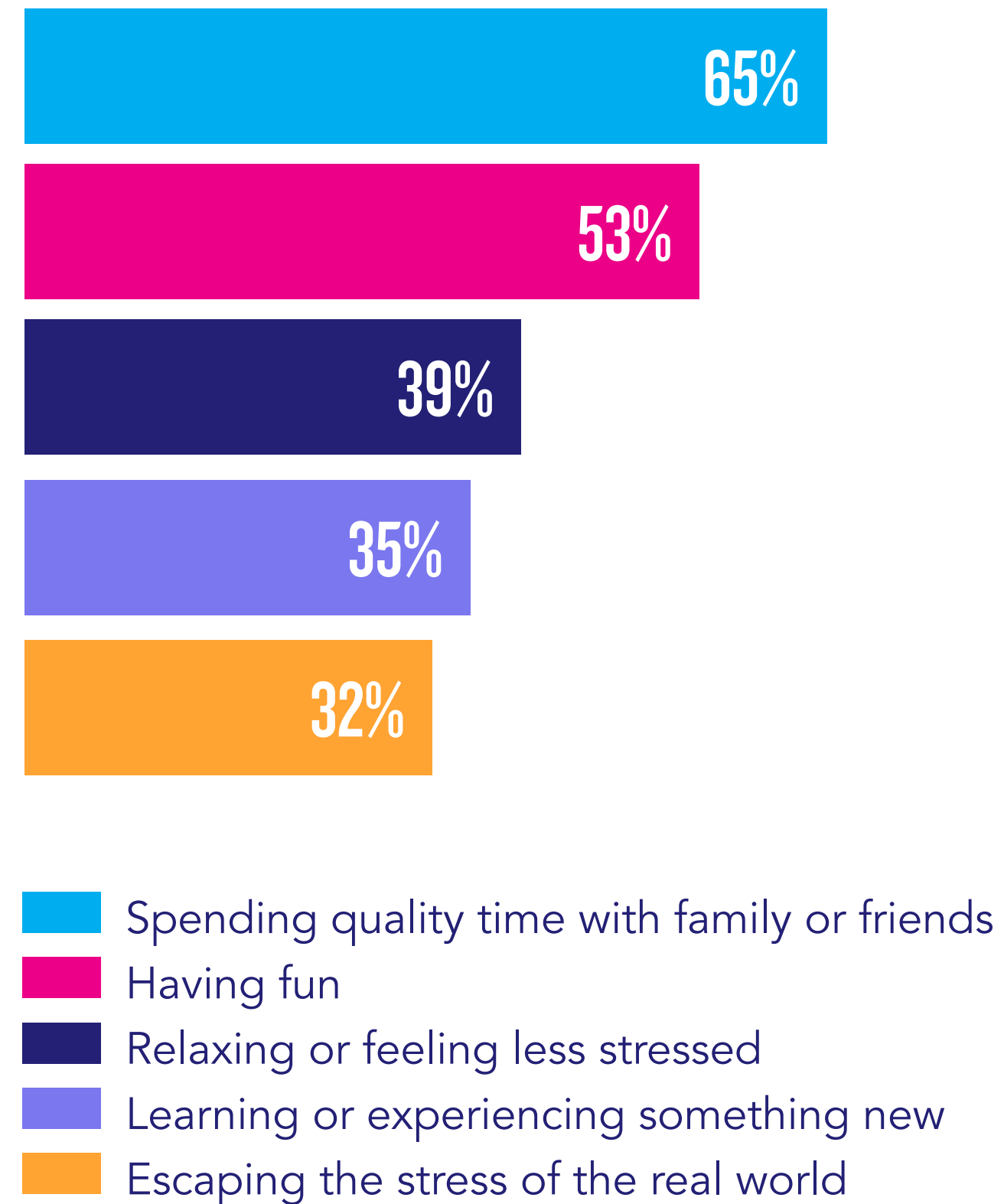
What do you want more of in your life right now? Please check up to five.



3% selected none of these.

Q

Now that many of those cultural activities are shut down during the pandemic, what (if anything) do you miss most? Please check up to five.



5% selected none of these.

Creativity During Crisis

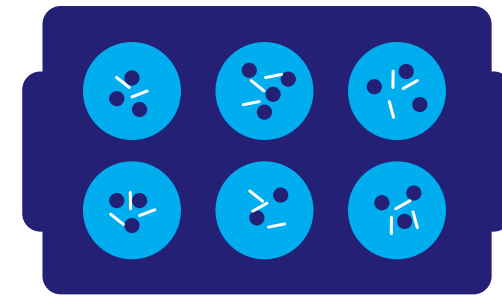
The vast majority of respondents express and challenge themselves creatively in quarantine.

81% report doing something creative during the pandemic.

Q

Some people are doing creative things during the pandemic. Have you done any of these things in the past 30 days? Please check any that apply.

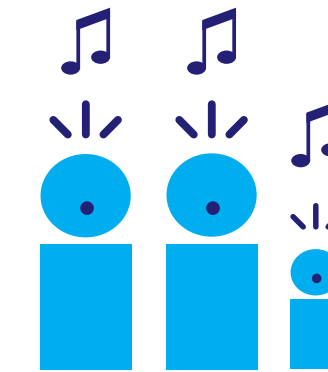
#1



62%

Cooking a new recipe or baking something

#2

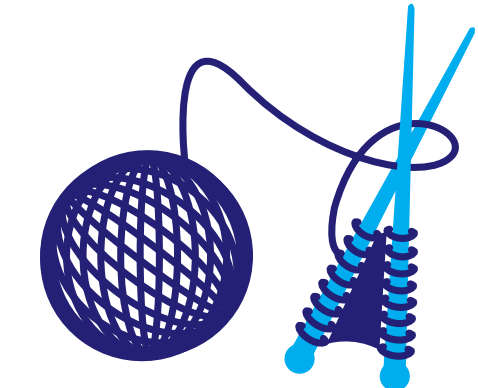


37%

Singing alone or with others

(Q: You shared that you did something musical and/or listened to music in the past 30 days. What kind of musical activities did you do?)

#3



27%

Making something by hand (quilting, pottery, woodwork, ceramics, knitting, metalwork, etc.)

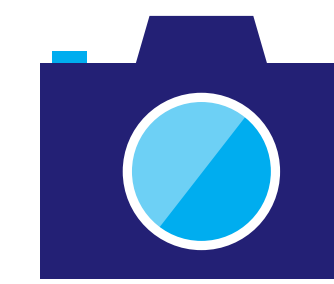
#4



20%

Painting, drawing, sculpting, printmaking, etc.

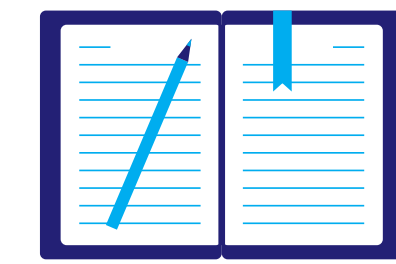
#5



19%

Photography or photo editing (as a creative activity, not for work or school)

#6



16%

Creative writing, writing poetry, journaling

Respondents could select from 14 activities. Only activities above 16% are represented. 19% selected none of the above

Tuning In to Digital Trends

Respondents sample a range of online cultural offerings, of which learning-based activities are seen as particularly valuable.

53% report participating in one or more digital cultural activities.

Q

Have you done any of these online or digital cultural activities yourself in the past 30 days? Please check any that apply.

Q

How valuable to you personally were those activities?

#1 Pre-COVID recorded performances

60% valuable

#2 Live-stream performances

66% valuable

#3 Online activities for kids

76% valuable

#4 Online classes or workshops

68% valuable

#5 Podcasts

63% valuable

Only top 5 activities are listed.
Participation ranged from 17% to 12%.

Five point scale for value.
Top two responses are combined.

What Makes Digital Culture Valuable?

“Almost all [of the online activities I tried] provided a sense of **community** and a strange kind of **intimacy**. There was a sense of **being connected with the world** outside my house and the grocery store.”

Q: What made those activities valuable for you?

What could have made those activities more valuable for you?

“Right now, I am looking for **things to do with my children** that allow us to be together and to enjoy something I don't have to organize myself. I want them **to learn and to experience the world.**”

“The activities that were most valuable were those that **helped me accomplish a task or learn something new.**”

“It was a chance to keep in touch with **creativity**, especially when it comes **from artists or places that I admire**. The chance to interact with them is a plus.”

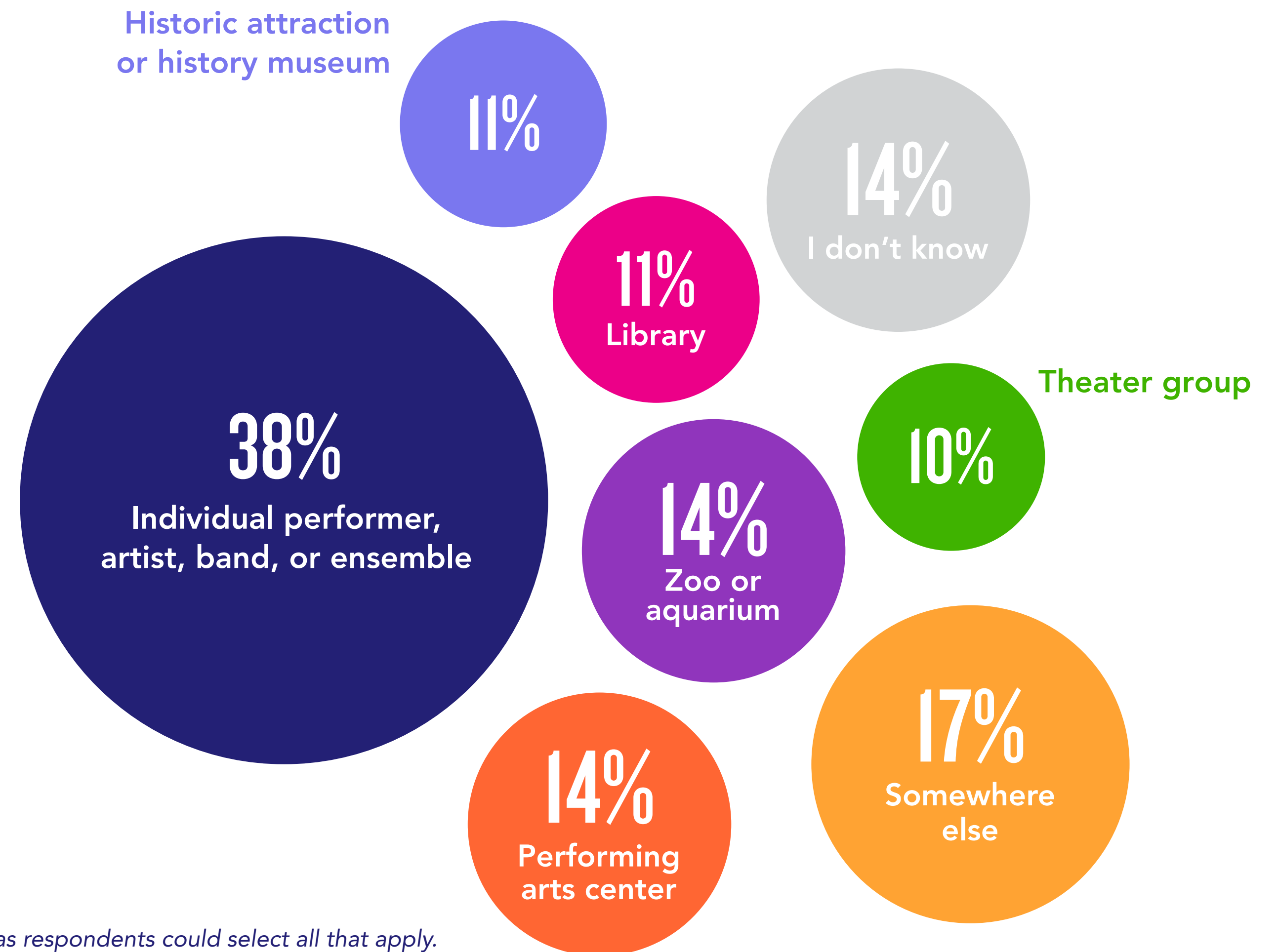
Looking to Content Creators

Respondents access digital cultural content from a variety of sources, with individual performers being the single largest category. Few are paying for online access to culture.

ONLY 13% report paying for access to digital cultural content that they used.

Q

Were any of the online activities you used offered by the following sources? Please check any that apply.

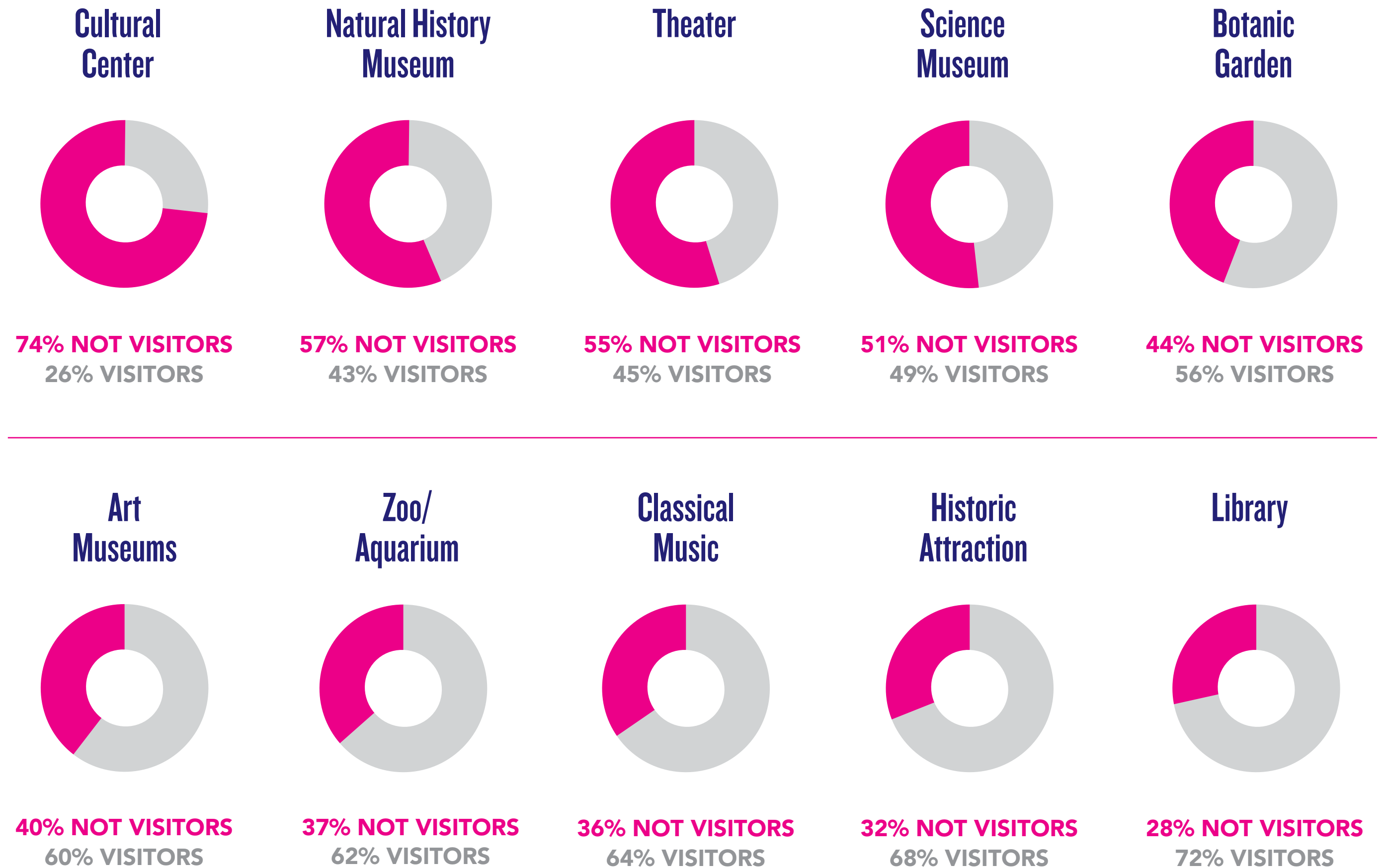


Total exceeds 100% as respondents could select all that apply.

A Virtual Gateway

Many respondents who are using online cultural offerings had not physically visited the same kinds of cultural organizations in the past year.

Breakdown of Digital Users by Content Category and Prior Visitation



Categories are listed in descending order of non-visitors in the past year.

Do Digital Offerings Expand Access to Culture?

“I’m disabled, so even COVID-19 aside, I appreciate **digital access to cultural explorations I might not otherwise have.**”

“I hope this kind of **creativity in access and availability** grows in non-pandemic times.”

“I was able to participate in activities that I might **not be able to afford financially.**”

“The rapid shift to online programming and digital exhibits from my favorite institutions across the country has allowed me to **participate more and on my own schedule.**”

Q: What made those activities valuable for you?

What could have made those activities more valuable for you?

When We Come Back

As respondents deliberate crossing the threshold from quarantine to public life, arts and culture organizations have power to help ease their anxieties with new safety protocols. Offerings that meet their current emotional needs can help encourage them to come back sooner.



A Cautious Return

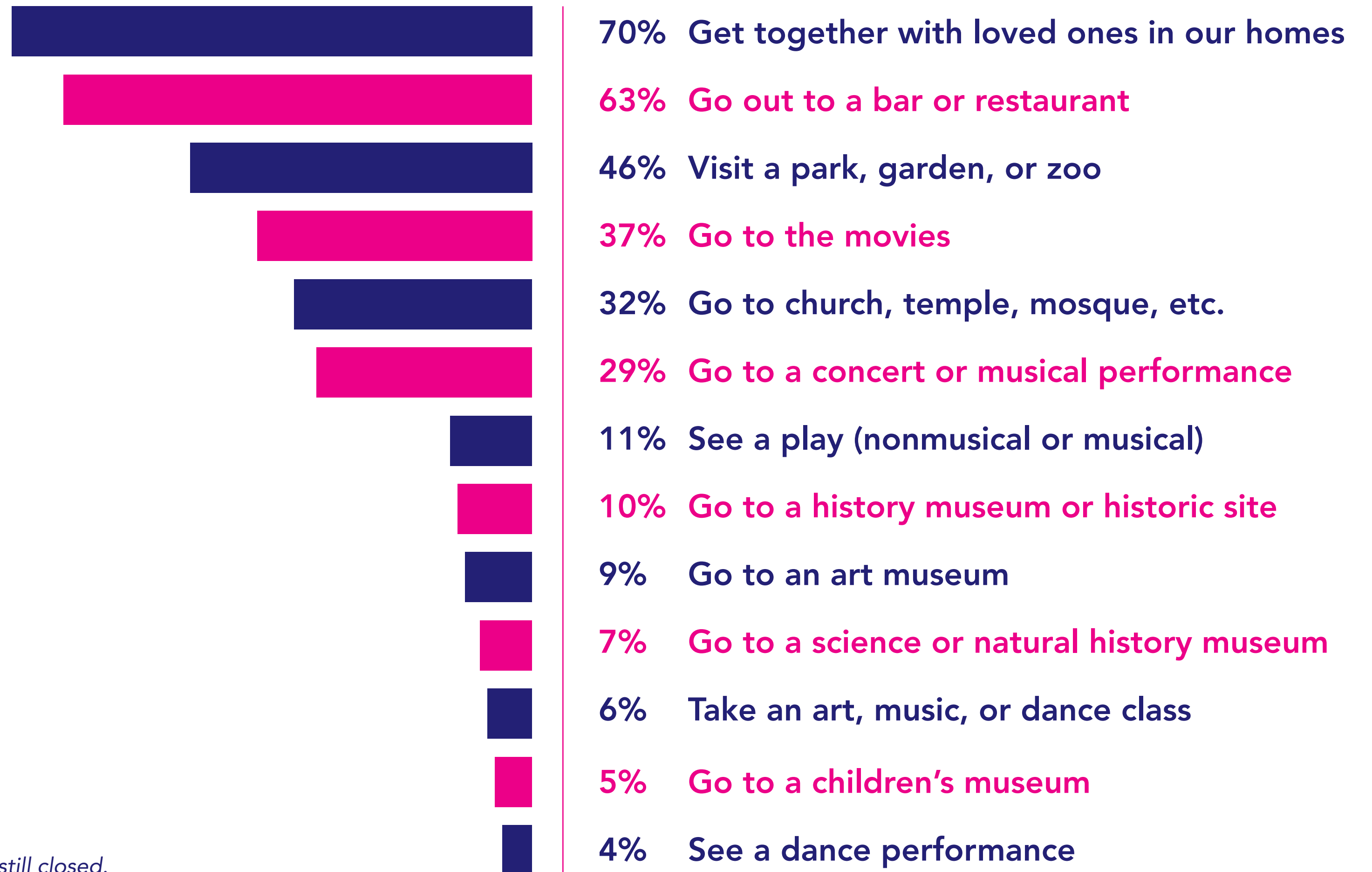
After weeks of quarantine, respondents are eager to reconnect with loved ones and dine out, but aren't as excited to resume most cultural experiences.

69% had done little to no planning for future arts and culture experiences*

*Survey closed on May 19, 2020, when most in-person cultural offerings were still closed.

Q

Thinking ahead to when people are able to go out again, what are you most excited to do in the first few weeks? Please check up to 5.

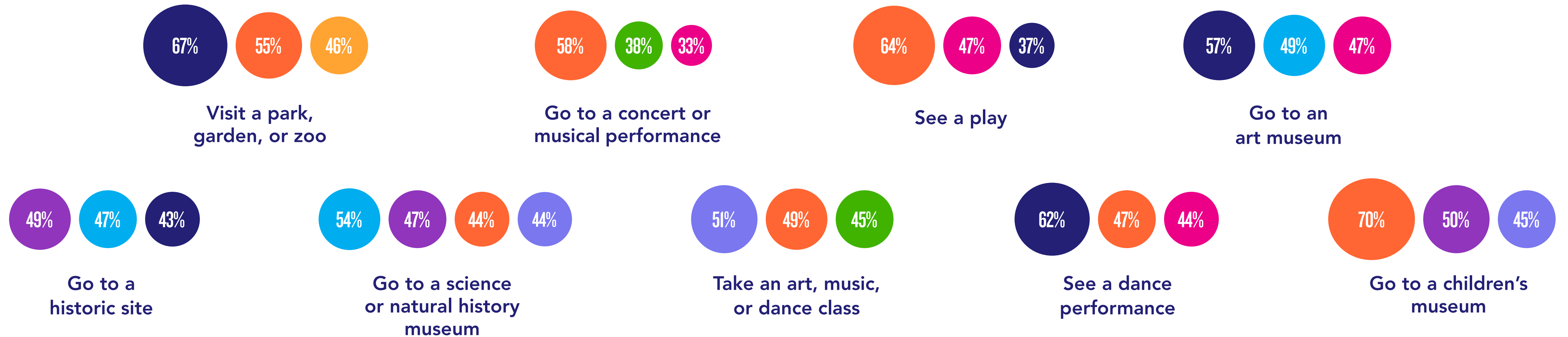
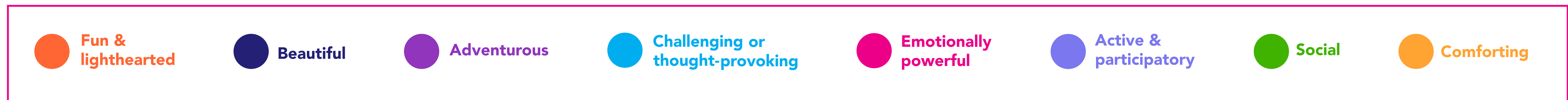


Play to Emotional Strengths

Q

You shared that one of the things you're most excited to do is _____. When you do that again, what qualities will you be looking for most from that experience?

Respondents seek a variety of qualities from different cultural experiences, but activities that are fun, lighthearted, and beautiful appeal most.



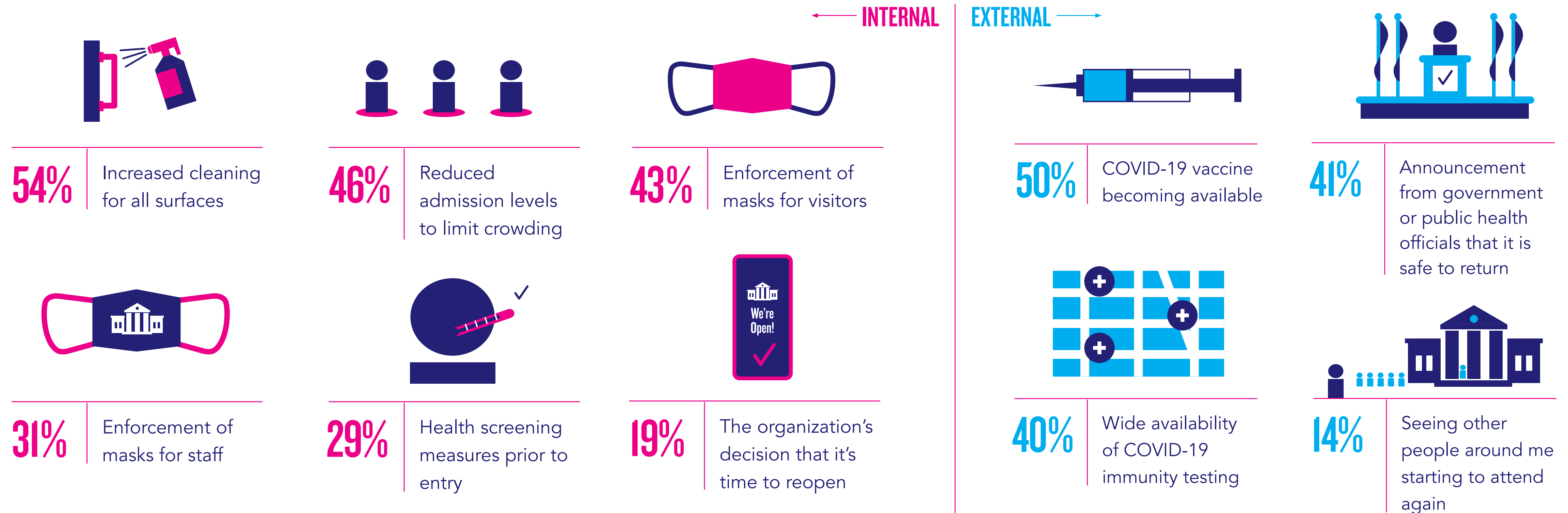
Only the top three qualities for each activity are listed unless qualities were tied.

Protocols for the New Normal

Organizations control **6 out of 10 factors** that will influence respondents' decisions to return to cultural activities.

Q

Which of the following factors will most influence your decision to resume attending in-person arts & culture experiences? Please check up to 5.



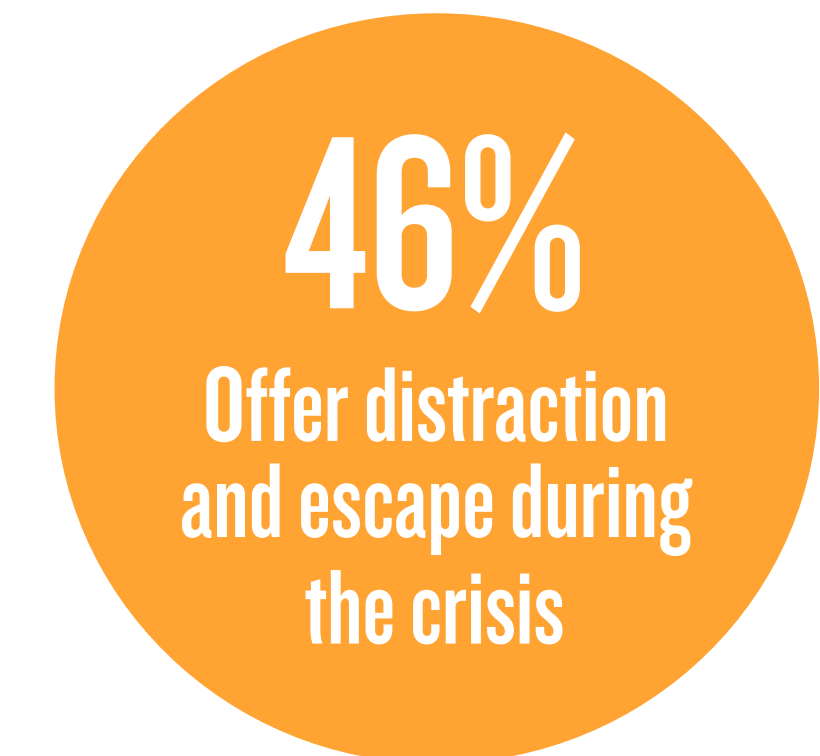
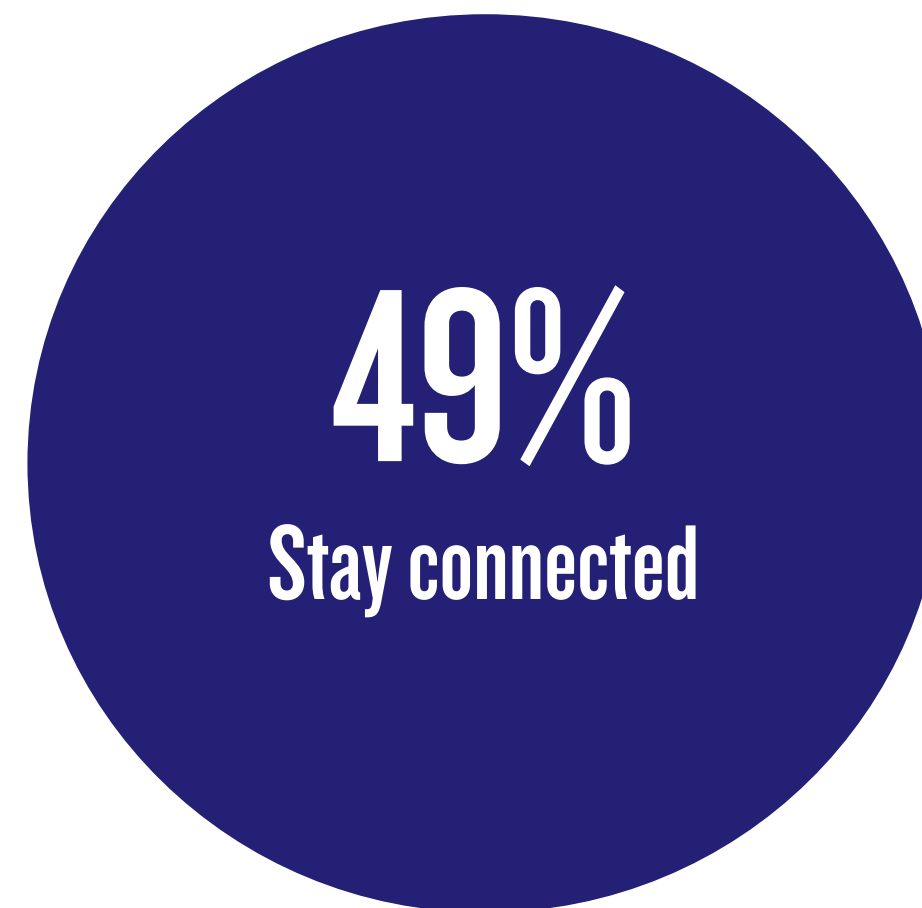
5% selected "Other."

A Meaningful Role to Play



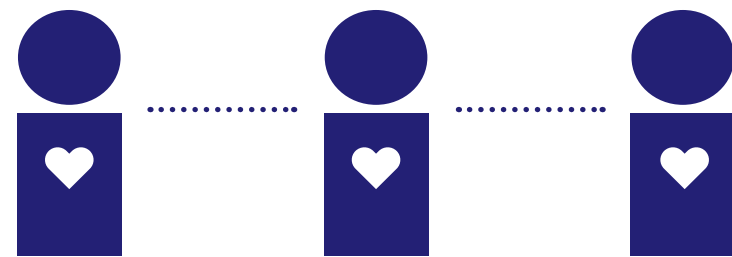
How would you ideally want arts & culture organizations to help your community during this crisis? Please check any that apply.

Many respondents want cultural organizations to help their communities decompress and stay connected during the COVID-19 crisis.



A Meaningful Role to Play (continued)

Response patterns revealed four core community needs.



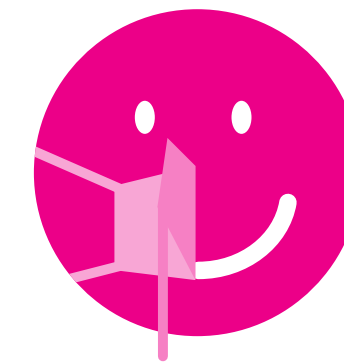
Connection & Processing

- 49% Stay connected
- 47% Educate children while schools are closed
- 34% Bring people of different backgrounds together
- 29% Know what's going on, with trusted information
- 28% Express ourselves creatively
- 27% Heal, grieve, and process our emotions



Practical Support

- 41% Look ahead and plan for recovery
- 21% Deal with financial and economic problems
- 18% Meet our practical, everyday challenges



Emotional Support

- 53% Laugh and relax
- 41% Have hope



Escape

- 46% Offer distraction and escape during the crisis
- 36% Think or talk about important things other than COVID-19

Response patterns were grouped into themes using factor analysis. Total exceeds 100% as respondents could check any that apply.

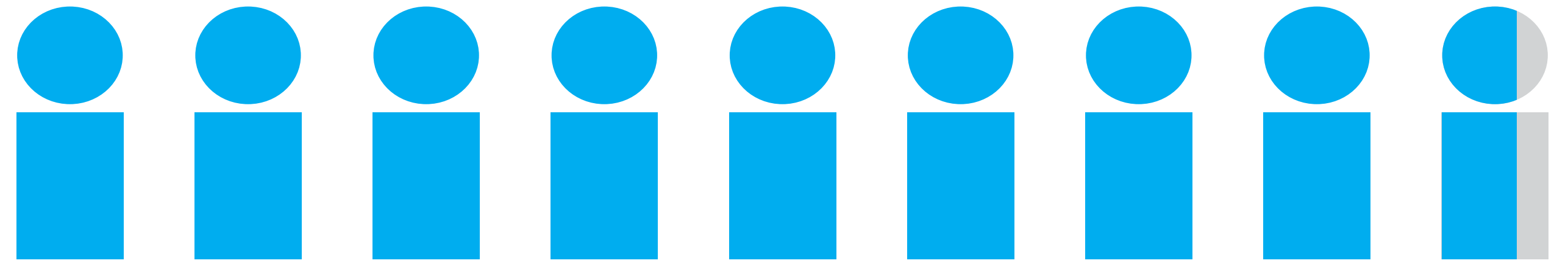
A Community Mandate

Americans want arts and culture organizations to become more active participants in their communities, and they want to see their communities better reflected in these organizations. These sentiments may have intensified in the weeks since the survey data was collected, in the wake of national protests against police brutality and systemic racism.



A Notable Absence

96% of respondents identify various ways that arts and culture organizations can help their communities during the COVID-19 crisis, but only 1 in 3 report seeing these organizations helping in some specific way at present.



Q: How would you ideally want arts and cultural organizations to help your community during this crisis?
Only 4% chose "Arts & culture organizations shouldn't play those roles in times like these."



Q: Please tell us how much you agree or disagree with the following statement: I've seen or heard about an arts or cultural organization in my area helping our community during the crisis in some specific way.
Five point scale. Top two responses are combined.

Survey closed on May 19, 2020.

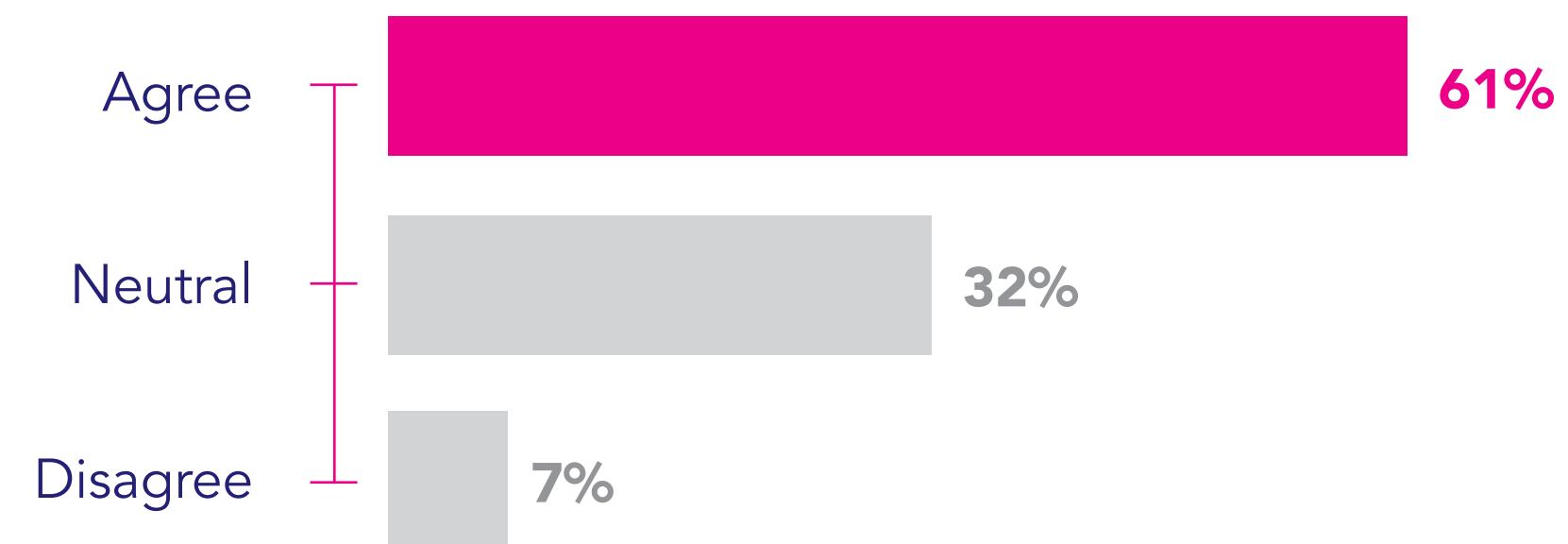
Are Arts and Culture Organizations Essential?



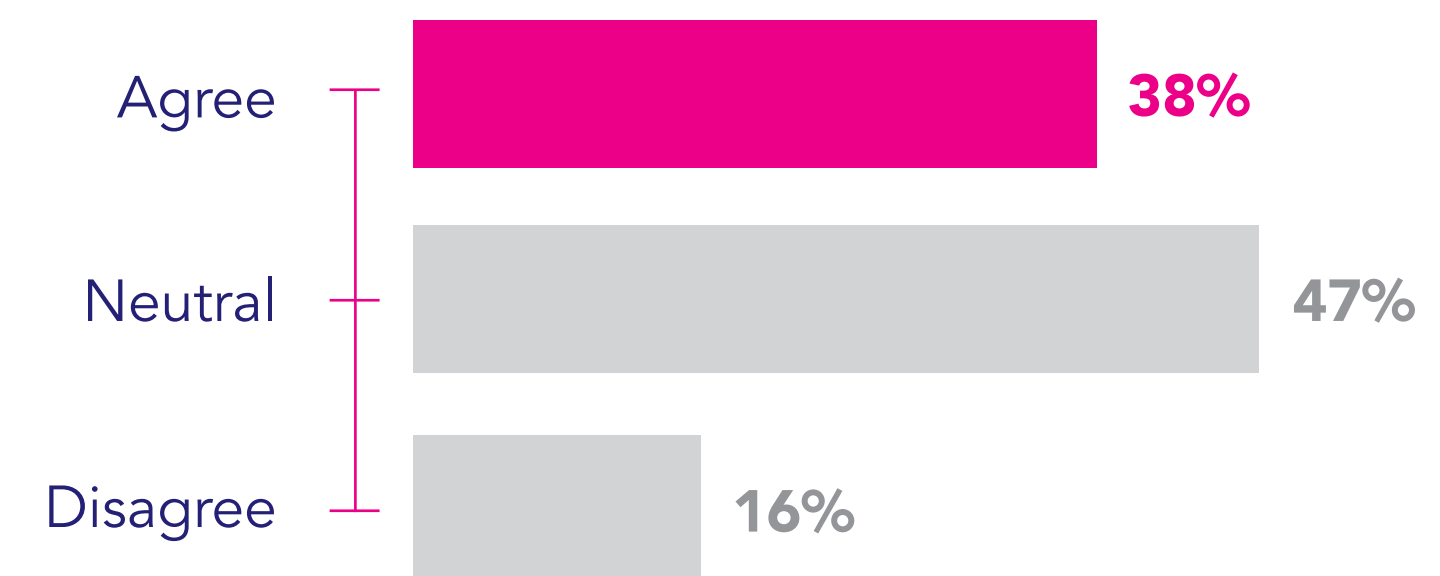
Please tell us how much you personally agree or disagree with the statements.

Respondents are aware of, but do not prioritize, the financial struggles of cultural organizations during COVID-19.

“The arts and culture organizations in my area are really financially struggling because of COVID-19.”



“During this crisis, we should support other kinds of nonprofits in my area before supporting arts and culture organizations.”



Five point scale. Top two and bottom two responses are combined.

Who Gets Support

Respondents continue to prioritize human services and religious causes and more strongly support health causes since COVID-19.

Q

What types of causes or organizations have you donated money to in the past 2 years?

BEFORE COVID-19

1. Human services*
2. Religion
3. Environment & animals
4. Arts, culture, & humanities
5. Education
6. Health

Giving in 2018–2019.

DURING COVID-19

1. Human services*
2. Religion
3. Health
4. Environment & animals (tie)
4. Arts, culture, & humanities (tie)
5. Education

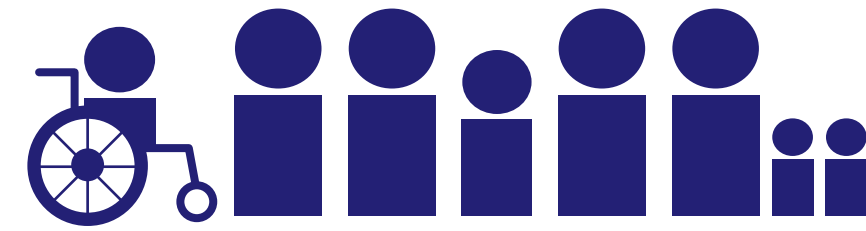
Giving in 2020. Survey closed on May 19, 2020.

**Human services includes poverty, children's services, elderly care, etc.*

The Change Respondents Want to See

Respondents indicate a variety of ways cultural organizations could change to be better in the future. **72%** selected one or more of these changes.

28% selected "Nothing—I wouldn't change them at all."



Inclusivity and Community

- 24% Supporting local artists, organizers, etc.
- 24% Friendlier to all kinds of people
- 20% Treat their employees fairly and equitably
- 19% Engage more young people
- 18% More focus on our local community
- 18% More diverse voices and faces
- 15% Working with other nonprofits in our community

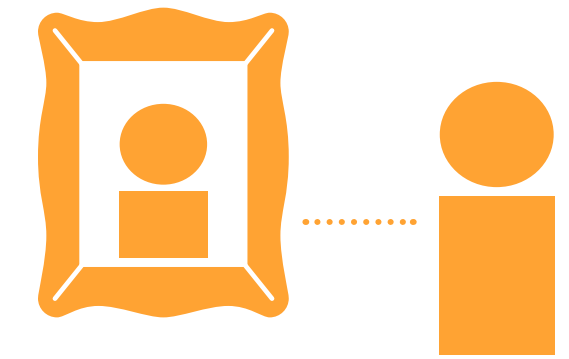
Q

In general, what kinds of changes would make arts and culture organizations better for you in the future? Please check all that apply.



Enjoyment

- 28% More fun
- 17% Less formal
- 14% More child-friendly



Reflection and Innovation

- 18% Stories or content that connect to my life
- 16% More frequent new works or exhibits

Response patterns were grouped into themes using factor analysis. Total exceeds 100% as respondents could check any that apply.

In Conclusion

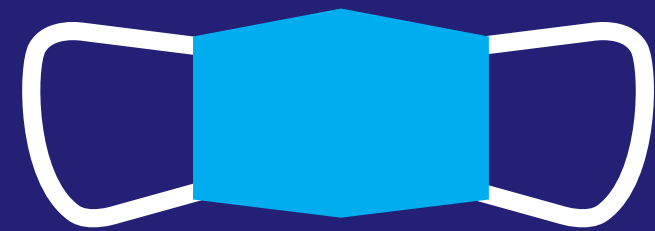
The pandemic has laid bare the cracks in the foundation of American society, from the arts and culture sector's representation gap and need to be more responsive to its various communities, to the structural racism that continues to oppress people of color while they also suffer disproportionately from the COVID-19 crisis. Cultural organizations are now on the front lines of this long-overdue national reckoning.

As we continue to analyze the Wave 1 survey data and embark on qualitative research and Wave 2 of the survey, we recommit ourselves to amplifying disenfranchised voices and exploring potentially transformative questions about the purposes, policies, people, and places of cultural engagement. We will seek the counsel and collaboration of experts whose experiences and perspectives will expand our understanding of equity and social change so that we can contribute to real progress in the cultural field and beyond.

The breaking down of inequitable systems paves the way for bold new ideas. We believe that this is the time for arts and cultural organizations not just to restart, but to reimagine. The task is clear: to serve our many communities more equitably, authentically, and sustainably.

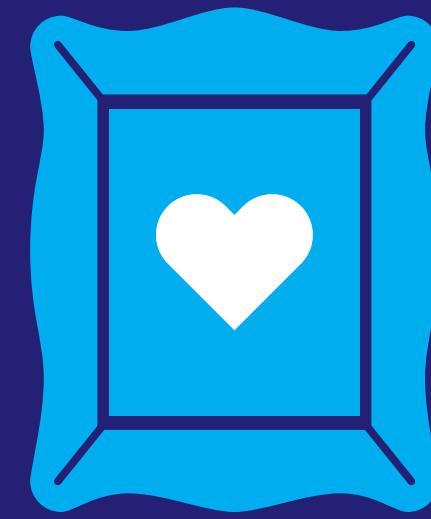
If not now, when?

Implications



Put Safety First

Audiences are clear about the measures they will look for as they assess the relative safety of spaces for re-entry. Many of these factors are within the control of cultural organizations' policies. Adopt and clearly communicate protocols that help address these safety concerns as a core component of the invitation to return.



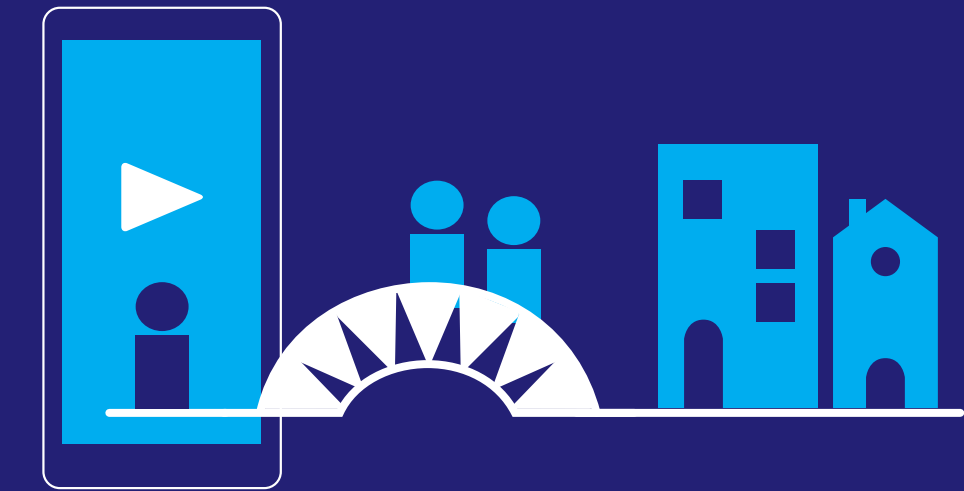
Lead with Empathy

As people continue to process the impact of the COVID-19 crisis on their lives and begin to experience recovery, they carry with them profound feelings of disconnection, worry, and boredom. Cultural sites can re-emerge as centers of public well-being, togetherness, and positive experience.



Include the Excluded, Who Need You More Than Ever

The COVID-19 pandemic now coincides with the crisis of racial injustice. Tragically, our study confirmed the disproportionate impact the pandemic is having on people of color. People today want and expect cultural organizations to play an active and inclusive role in their community, providing spaces for enjoyment, connection, and reflection.



Build A Digital Bridge to the Future

Digital forms of culture are a virtual gateway between new and current audiences, artists, content creators, and organizations. With the increased use of online activities during the COVID-19 crisis come new opportunities to reach people who might not have physically participated in the past. Early indications suggest that digital offerings can also attract and appeal to a wider and more diverse range of audiences.

“ The pandemic, and our country’s fractured responses to it, the magnitude of illness and death—all of these are almost unendurable. **We need places and ways to gather and still have joy and pleasure in our lives.** Places, even if virtual, to comfort each other and **feel human, humane, and normal.**”

Q: What made those activities valuable for you? We're curious what you enjoyed or found valuable.

“It’s nice to show that the **arts/cultural community is resilient enough to exist beyond the beautiful buildings** they’re housed in. It shows that between the institutions and visitors the **connection is still strong.**”

Q: What made those activities valuable for you? We're curious what you enjoyed or found valuable.

“
Our nation's chief problem during the last 50 years is its **declining social cohesion**. Seems as if **the arts have a role here**. This wasn't acknowledged before the pandemic but would be vital **as we move to a different existence within the world-wide community** after the pandemic.”

*Q: How would you ideally want arts & culture organizations to help your community during this crisis?
Respondent selected "Other (please specify)."*

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



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

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

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THANK YOU

to the organizations who encouraged
their audiences to participate and to
the thousands of respondents
for their time and input.

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