

A photograph of two elderly people, a man and a woman, sitting on a wooden bench. They are seen from behind, looking out over a vast landscape of rolling hills and mountains under a clear blue sky. The man on the left is wearing a light-colored jacket and a blue and white plaid cap. The woman on the right is wearing a light-colored top and a white cap. The bench is made of dark wood and metal supports. The ground in front of them is a light-colored, paved surface.

Seeking a simpler life

The return of older audiences to culture after the Covid-19 pandemic

Visitor Studies Group Conference

Friday 10 May 2024

Introduction



Today's presentation

1. Impact of cost-of living on spending behaviour

Abigail Perry, Audience Researcher, V&A



2. Return of older audiences to culture post Covid

Medwen Roberts, Director, Morris Hargreaves McIntyre



3. How venues are using findings

Isabella Anderson, Senior Insight Manager, Royal Opera House



4. Q&A



V&A South Kensington

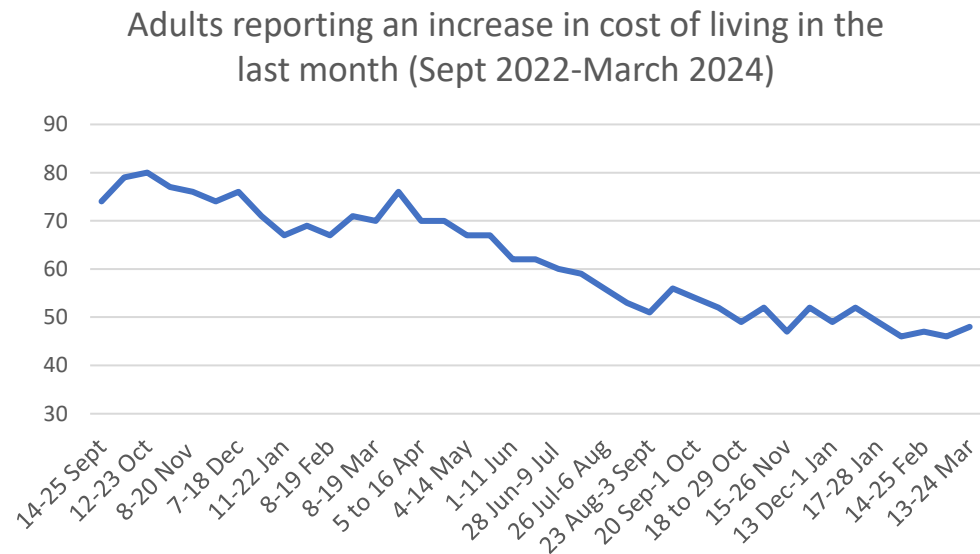
VSG Conference: Abigail Perry



The impact of the cost of living has been steadily decreasing, but is still felt now

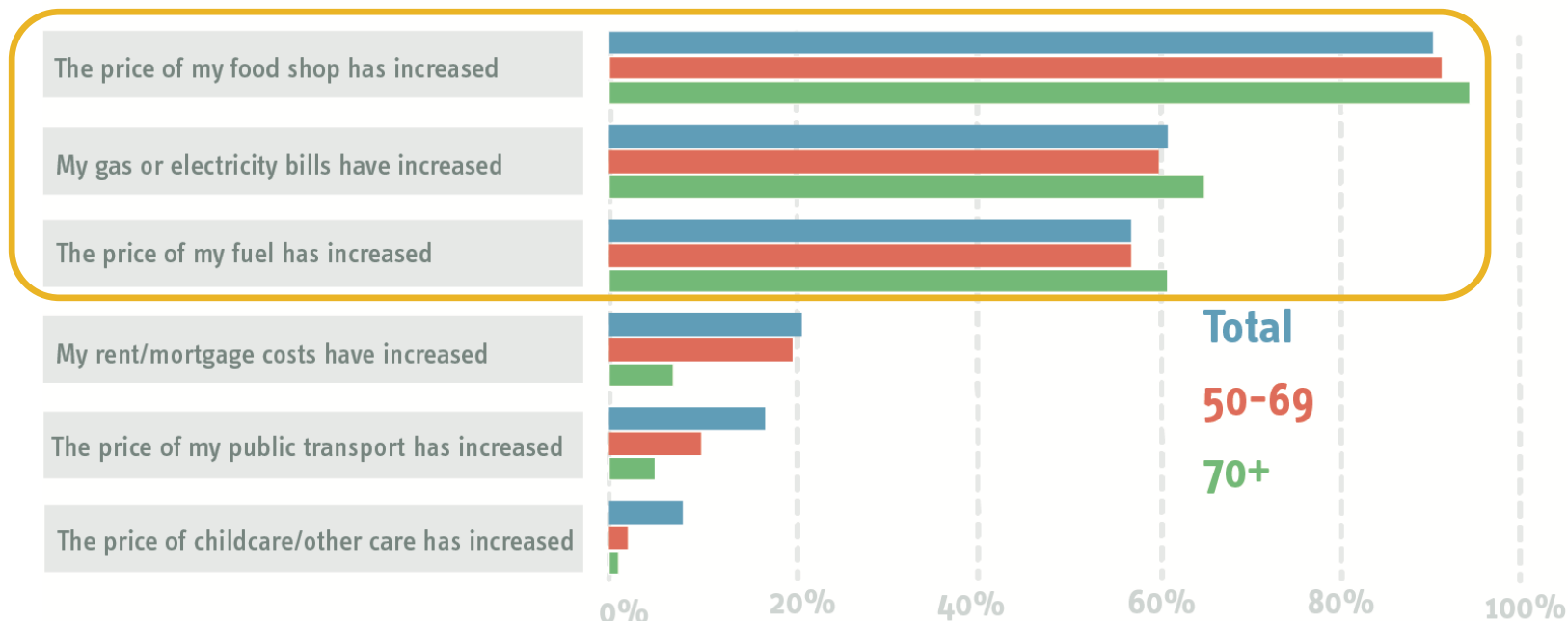
Those more likely to feel an impact may be:

- Those with **children or dependents** in the household
- **Lower income** households
- **Disabled** adults
- Those living in **rented** accommodation



Increases in essential spending are the biggest reason for an increase in the cost of living

Reasons for increased cost of living (of those who reported an increase) April 2024

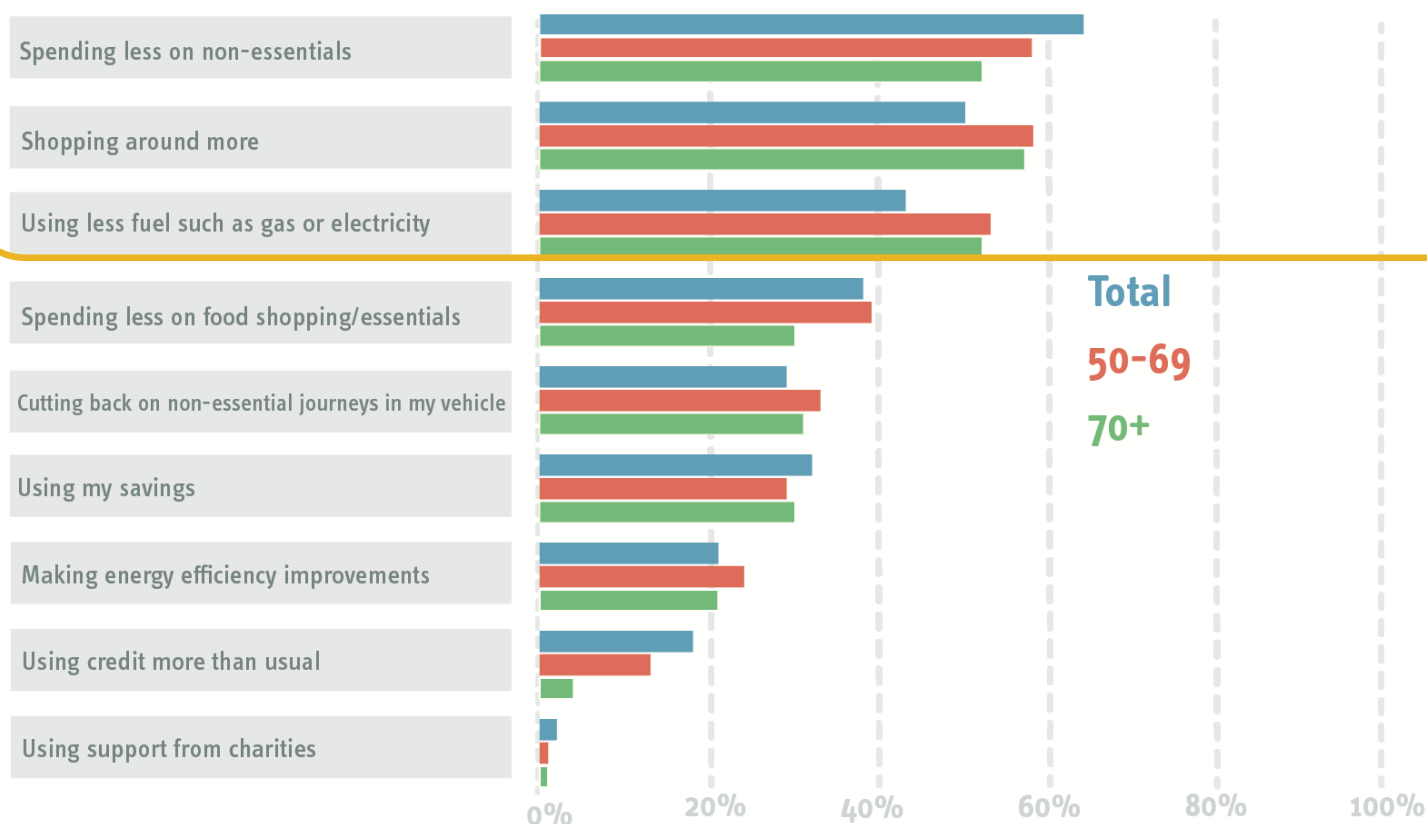


Source: ONS: Public opinions and social trends, Great Britain, 27 March to 7 April 2024



Older people are still making some changes to their spending behaviour

Actions as a result of increased cost of living, April 2024



Research Objectives



Research purpose

Context: declining numbers of older audiences at physical venues

The aims of this research were to understand:

- the attitudes and habits of older audiences (55+) in relation to culture in a post-pandemic context
- how to (re)-engage these audiences with venues' offers



Research questions

- What is the nature of the decrease in visitation to cultural venues from this audience?
- Why are older audiences not returning to our venues in the same way post-pandemic?
- How should venues re-engage with these audiences?



MHM Older Audiences Research

Medwen Roberts, Director



Methodology



Methodology

Population Survey – Online panel

- Total sample: 1,117
- Split into two geographic groupings
London and South East and Rest of England, Scotland and Wales
- Age groups: 55-64, 65-74, 75-84, 85+
- All participants had visited cultural events/venues at least once in the three years before the pandemic
- Hosted online by MHM from 9 – 20 October 2023

In-depth Interviews

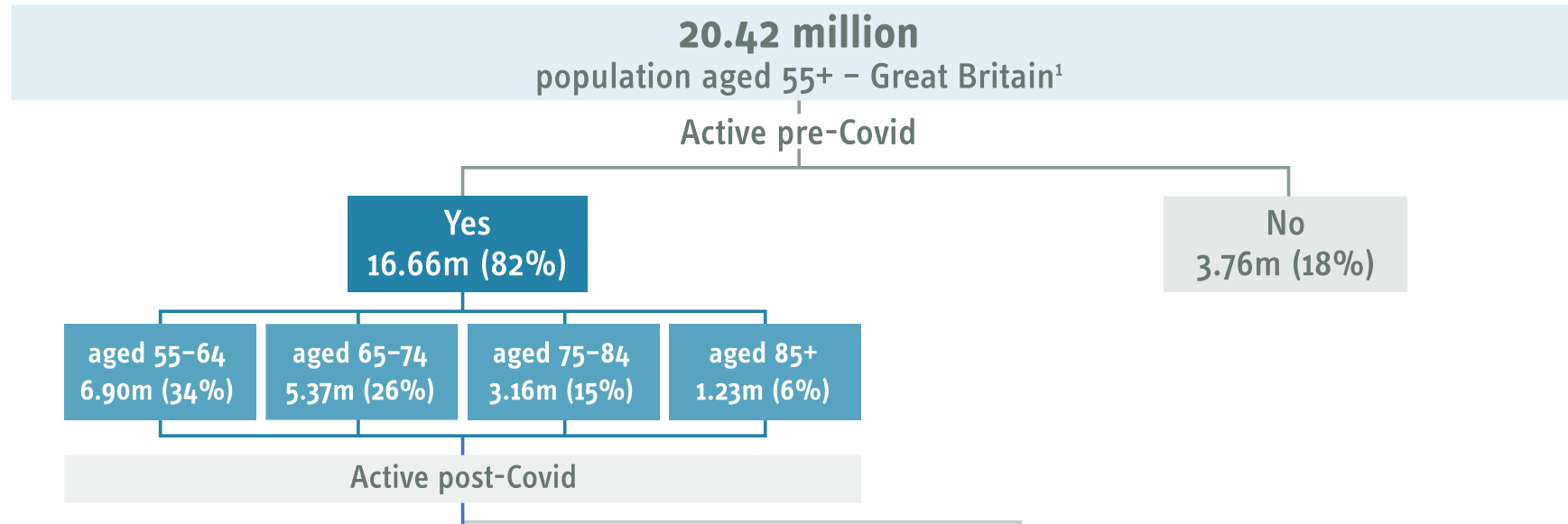
- 10 in-depth interviews lasting 45 mins
- Mix of people living in London, the South East and the Rest of the UK
- Ranging in age from 56 to 80 years old
- All had reduced cultural activity since the start of the pandemic
- Carried out via telephone and Zoom between 23 October and 6 November 2023



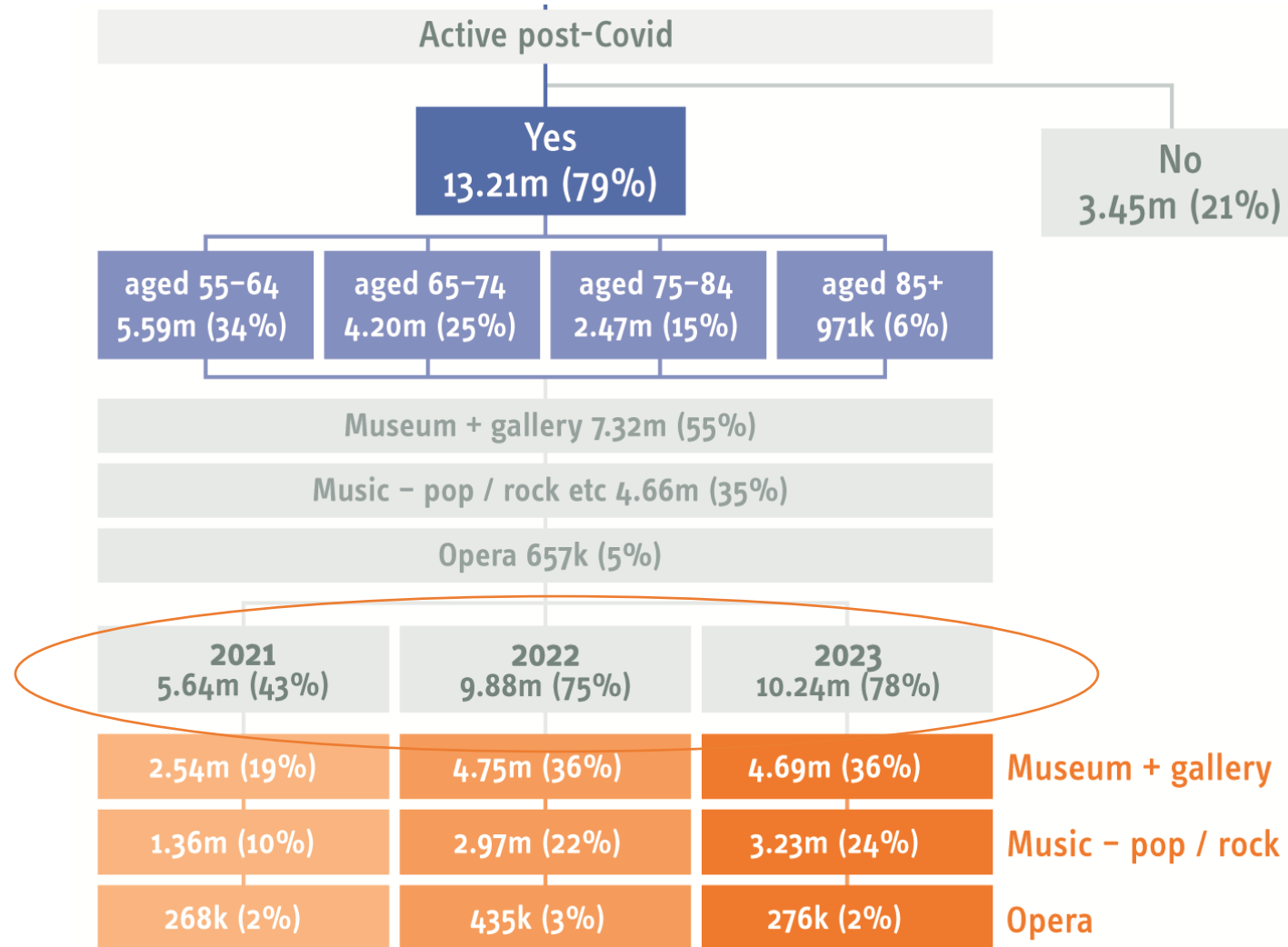
A fifth of over 55s yet to return to culture post-Covid



One in five over 55s yet to return to culture



One in five over 55s yet to return



Who are the missing 21%?

- **Demographically** – little different from those who have returned except have greater access needs
- **Behaviourally** - less frequent attenders pre-Covid
- **Barriers to return** – crowded venues (25%) and worries about Covid (26%) significantly more likely to be a major factor but **cost of living impacts (51%)** and **cost of tickets (48%)** remain as the main barriers to return
- **Need a reason to return** – 38% feel that what venues are currently offering doesn't appeal



Number of older people visiting London for culture falls

Proportion of market who have visited Central London for a cultural event pre and post covid

Total

Pre Covid: 54%

Post Covid: 34%

[1095]



**Cost and hassle are primary
deterrents**



A shift in priorities among older people

‘I certainly don’t do as much as I used to do. It seems to be a simpler life, which is quite strange ... it wasn’t as though I was living a life I didn’t like ... [but it has changed] in a positive way.’

Female, 56

I started doing other activities during lockdown and prefer to continue with those



Net disagree Neither Net agree

[Base (excluding don't know) 1144]

I've got out of the habit of visiting arts and cultural venues



Net disagree Neither Net agree

[Base (excluding don't know) 1139]



Financial factors have greatest impact

Factors impacting cultural attendance

Finance

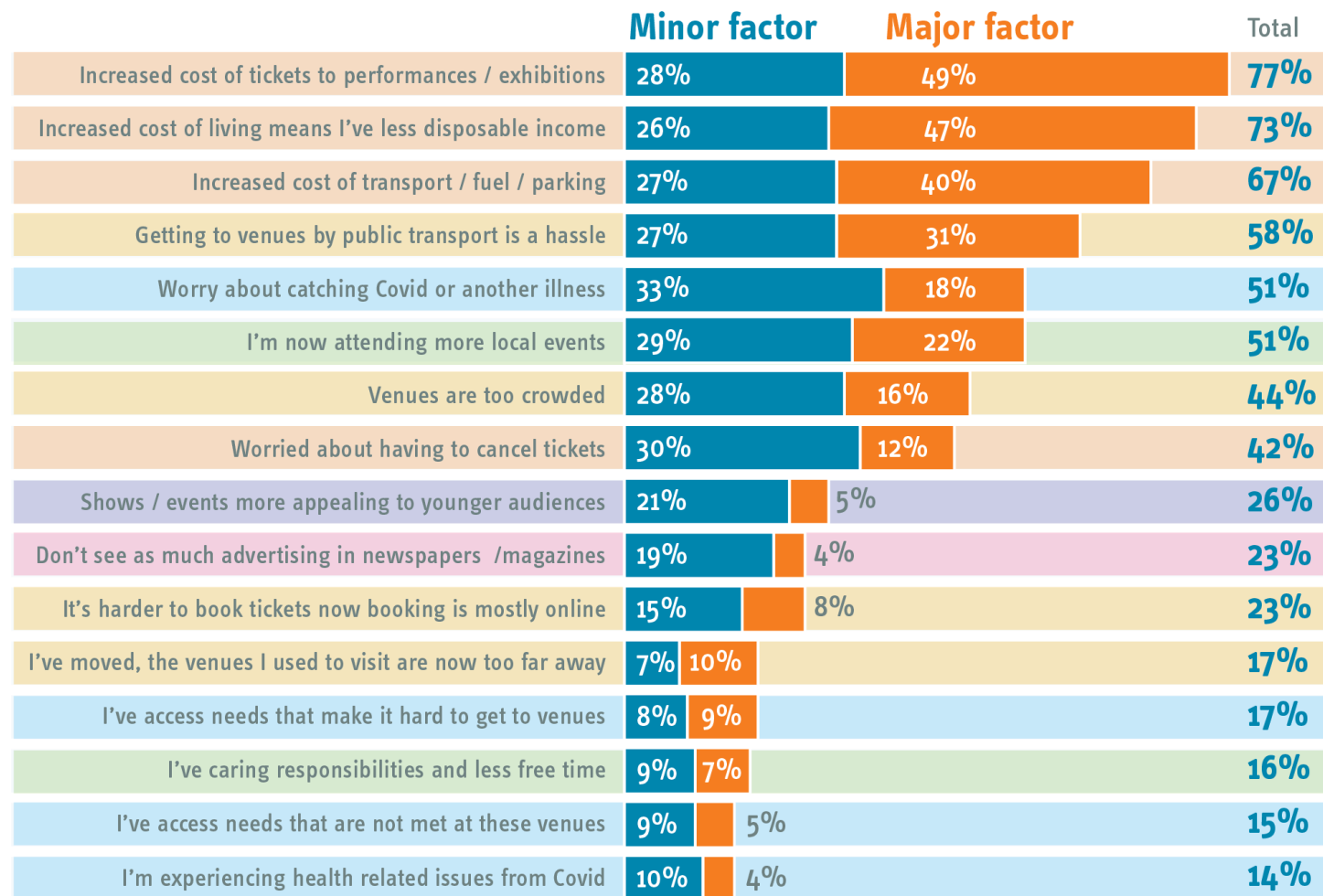
Hassle

Leisure

Health

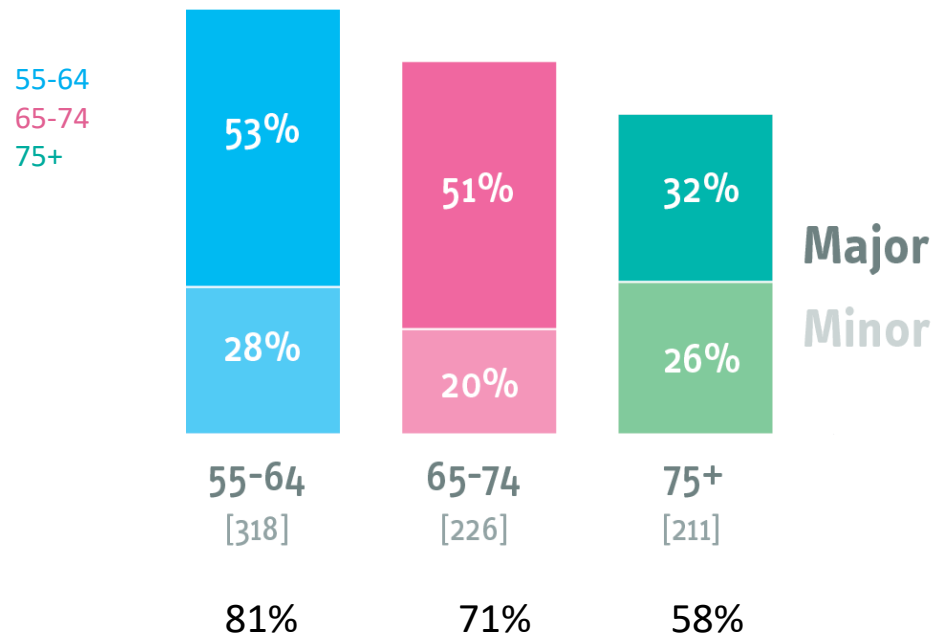
Programming

Marketing

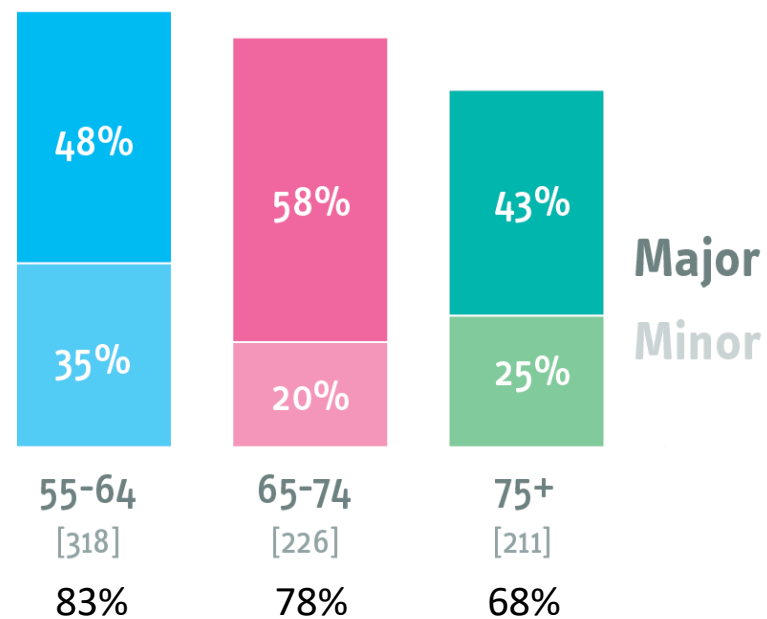


Cost of living crisis has had a major impact on cultural engagement

How much is the following a factor in limiting your cultural engagement: Increased cost of living means I have less disposable income



How much is the following a factor in limiting your cultural engagement: The increased cost of tickets to performances / exhibitions



Cultural spend is a luxury, not a necessity

‘London attractions are less of a priority than they used to be ... especially things like musicals, they are very expensive. I have been to some since the pandemic, but... it costs an astonishing amount of money.’

Female, 72

‘With the cost of living rising rapidly, I just cannot afford to go to cultural venues, even though I would like to.’

Female, 72



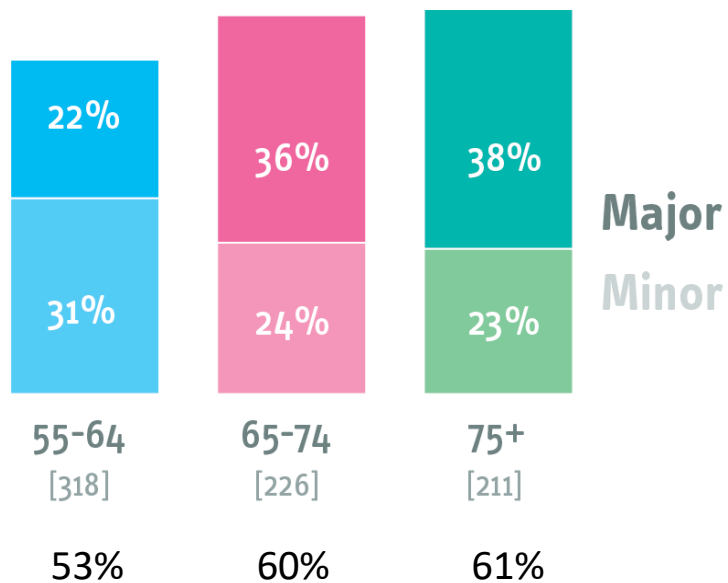
**Crowds and public transport are also
deterrents**



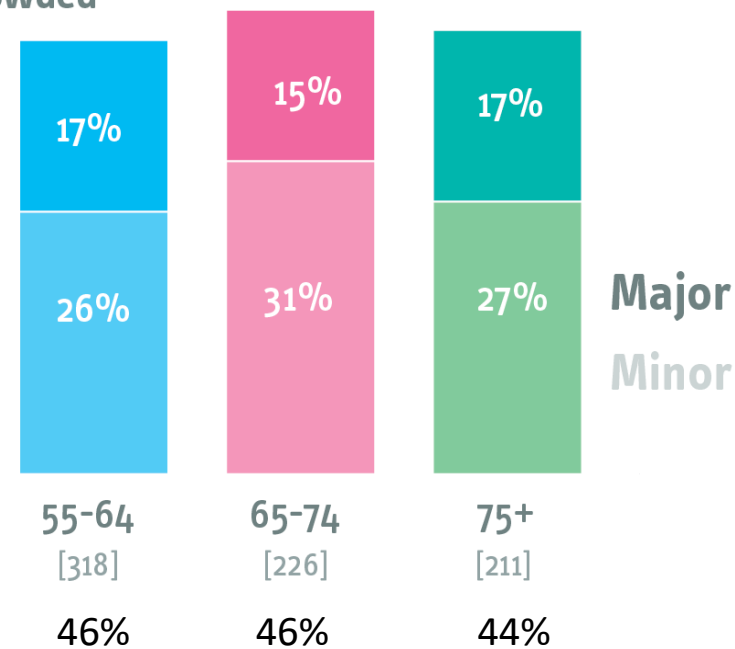
Crowds and public transport are frustrations for older audiences

How much is the following a factor in limiting your cultural engagement: Getting to venues by public transport is a hassle

55-64
65-74
75+



How much is the following a factor in limiting your cultural engagement: Venues are too crowded



The list of travel complications is endless...

- Ticket office closures across England due to reduced staff, access and facilities [Stevens, 2023](#); [RMT, 2023](#)
- Ban on the 60+ (Freedom Pass) before 9am Mon-Fri made permanent [Lyndall, 2023](#)
- Increasing digital ticketing [Inside Croydon, 2023](#)
- Fewer public transport options in outer London [Enfield Dispatch, 2023](#)
- Inaccessible pavements, crowding and lack of public toilets [Nermond, 2023](#)
- Overcrowding on transport is a concern post-Covid, [Chapman](#)



Older audiences are more discerning post-pandemic

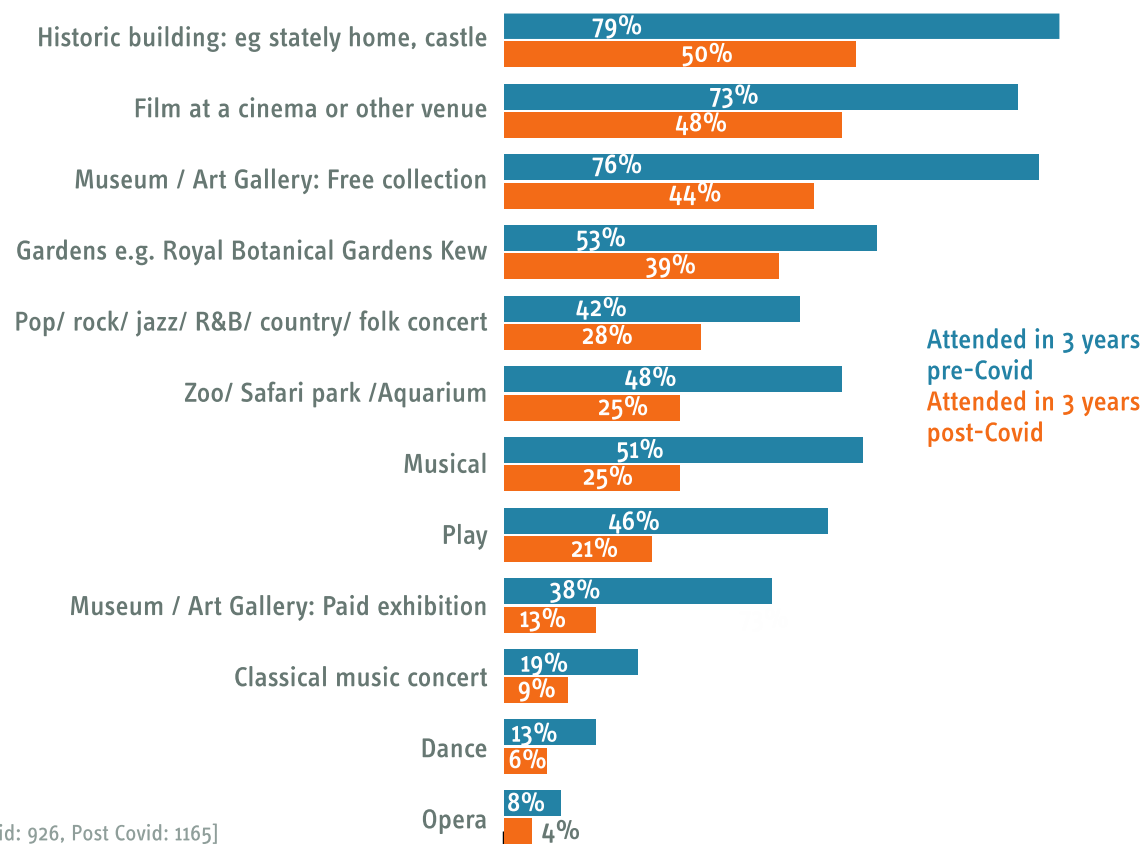
'Because we're not going as often, we tend to pick shows we are pretty certain we're going to enjoy, whereas before we may well have said 'Oh, we'll try that. We'll see what it's like.' So we're more choosy about the shows we go to.'

Male, 77



The most accessible genres have been well attended by older audiences since the pandemic

Attendance at genres pre and post Covid

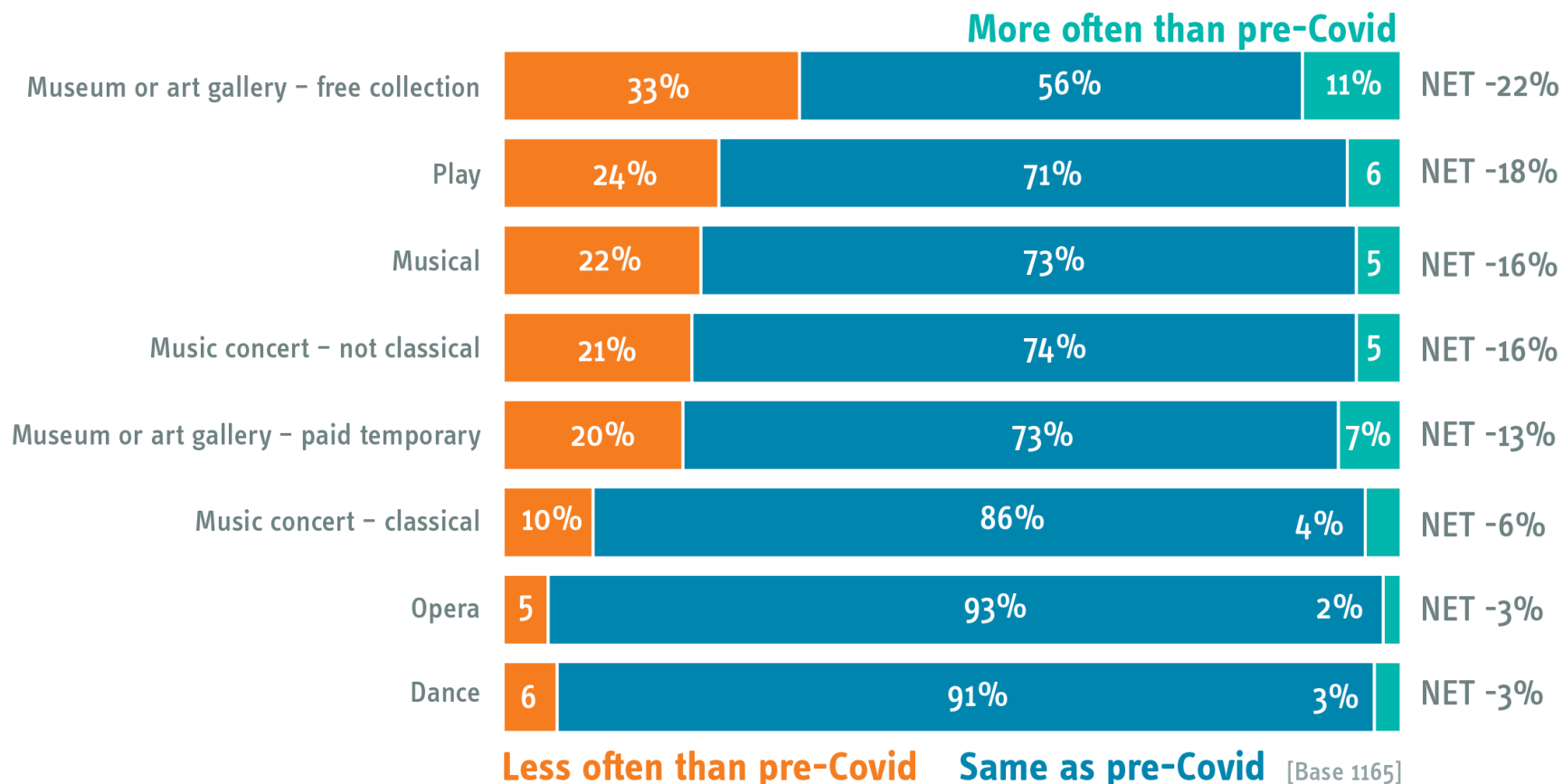


[Base: pre Covid: 926, Post Covid: 1165]



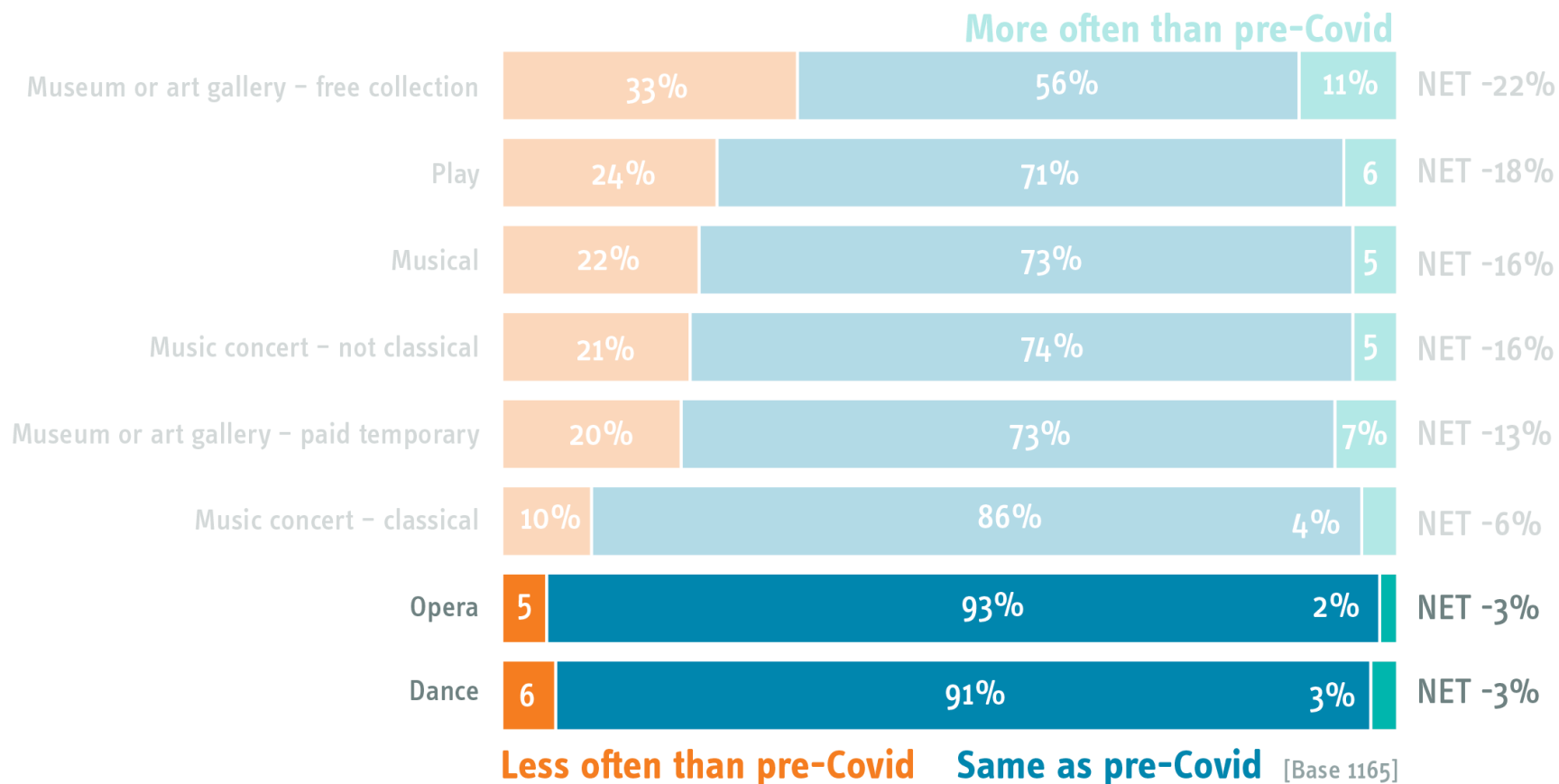
Genre choices demonstrate that the older market are making safer choices when engaging with culture

Pre vs post-pandemic – artform engagement



Older audiences are less likely to take a risk on opera and dance post-pandemic

Pre vs post-pandemic – artform engagement



Six hypotheses tested on older audiences not returning to culture

Hypotheses tested

Financial: increase ticket costs / increased transport costs / fears about having to cancel tickets

Travel and hassle: Moved further away / loss of confidence travelling / public transport disruption / crowds

Health: fears about catching Covid-19 / increasing health related issues associated with getting older

Leisure: Out of the habit of attending culture / less free time / diminished social circle / other hobbies

Programming: venues targeting younger audiences resulting in loss of older audiences

Marketing channels: move to digital marketing means older audiences excluded



Recommendations



Promote 'safe' programming and guaranteed quality

'You want something that is going to hold your attention for two hours or whatever. Maybe it's had good reviews somewhere else as well. We tend to read reviews.'

Female 80

'Offer something worth the hassle of travelling to see.'

Female, 59



Earlier start times are a winner: need to keep a close eye on the National Theatre pilot scheme

I'm now more likely to visit or attend a venue or performance during the day than in the evening



[Base 1135]

Net disagree

Neither

Net agree

‘If we go out to the theatre, we tend to go to matinees because that’s what old people do. There’s no getting away from it.’ Female, 80



Online offer is nice to have but not worth major investment

I'd pay to watch a show online if I couldn't go in person



'Don't know' excluded for all statements

[Base 1115]

Net disagree

Neither

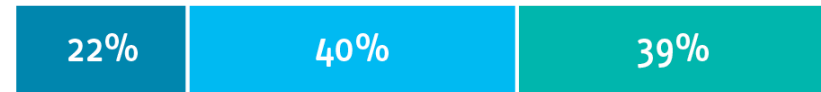
Net agree

'I don't know whether I would enjoy a museum visit or a gallery visit online as much as a real life... It would have to be something exceptional that would tempt me to do that rather than the real thing.' Male 77



Communicating quieter times may help older audiences plan

I'd be more likely to visit if venues had quieter / less busy performances or quieter times to visit



[Base 1123]

Net disagree

Neither

Net agree

‘Advertise what times are quieter and less busy.’ Female 71

‘Dedicated quiet time sessions with fewer people attending. I would pay a premium for this option. and I am sure there are others who would.’ Male, 63



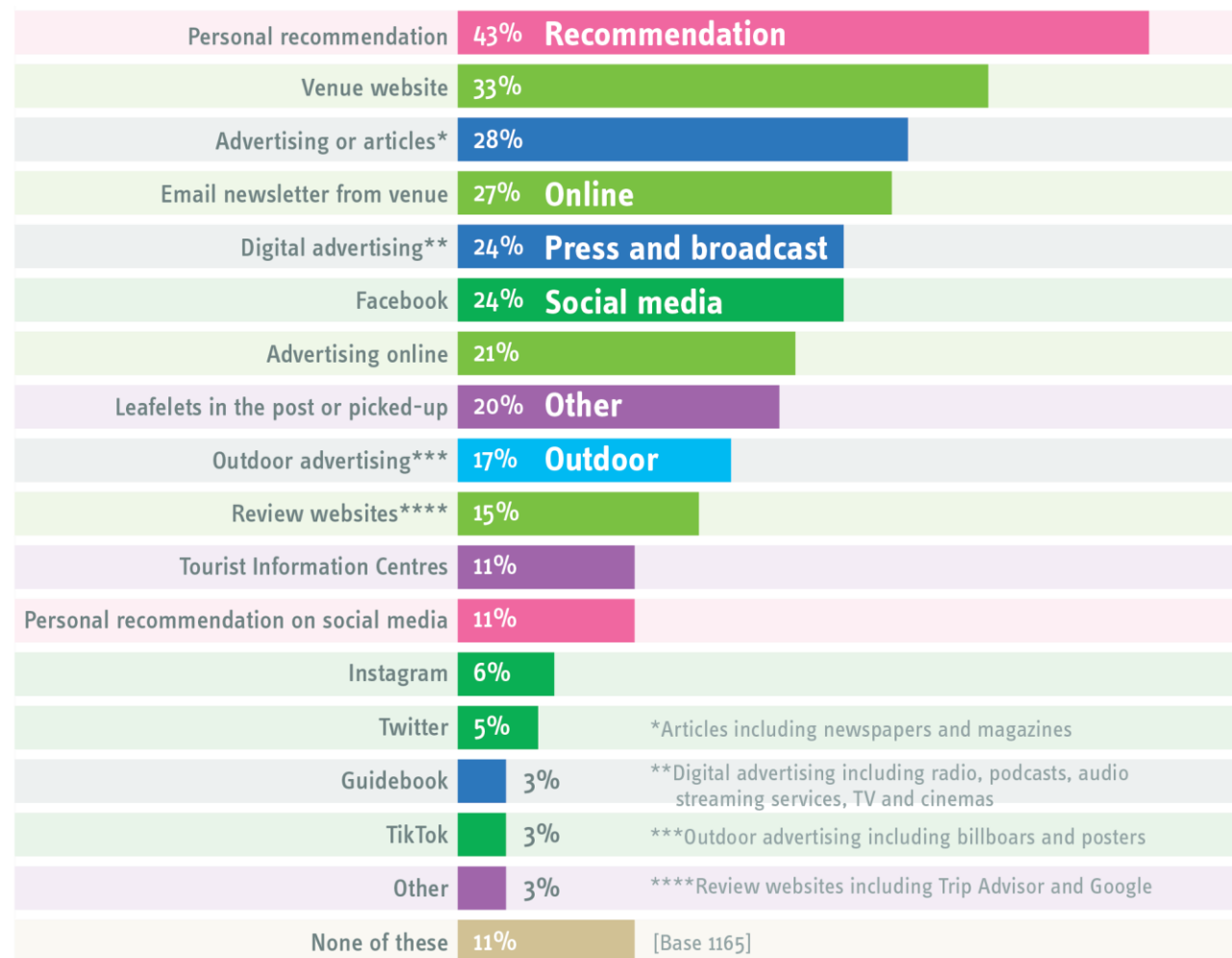
Look to major sporting events for proactive crowd management

‘We go to the cricket at Lords every year. Because we’re both old and there’s a huge queue to get in, they will pull us oldies out and slide us in through a side door. You know you’re going to be treated very well there.’ Female, 80

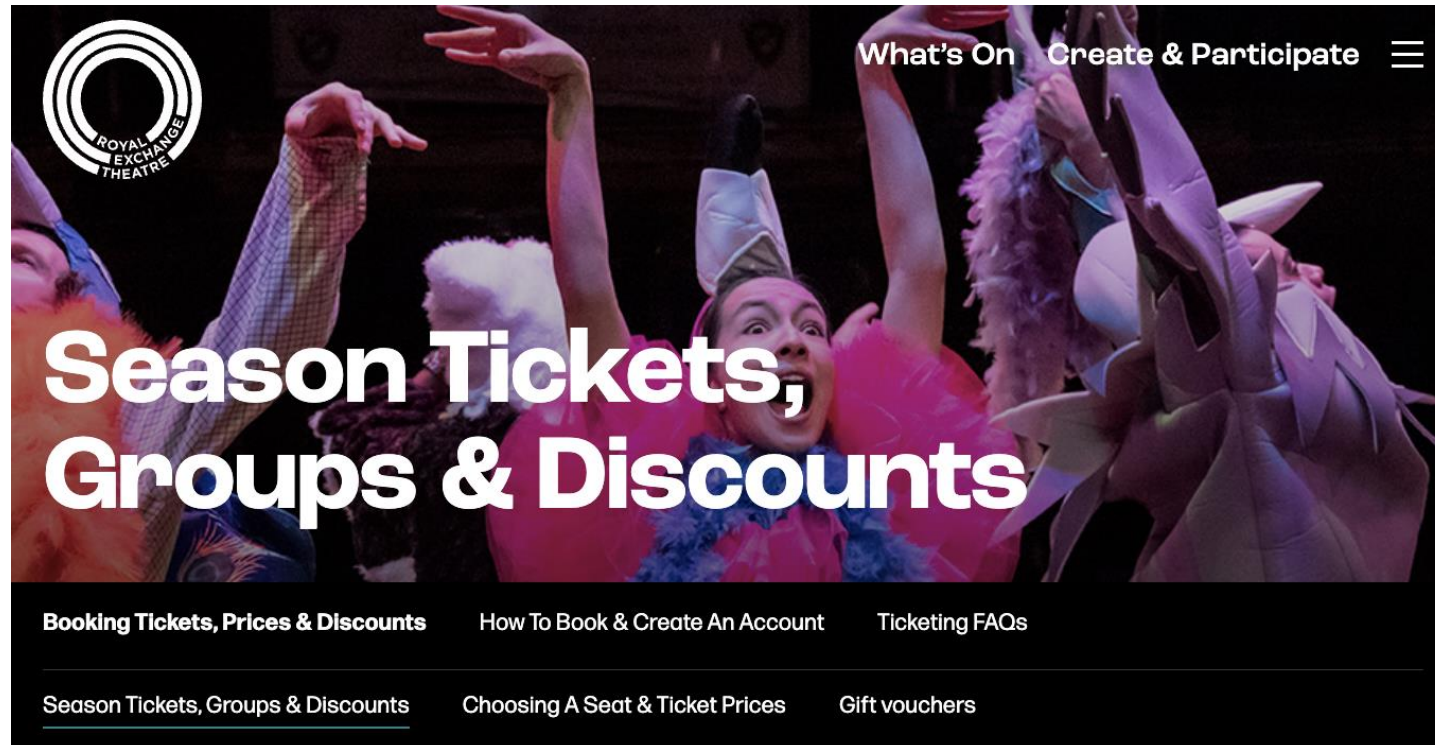


Target older audiences with direct marketing

How participants find out about cultural events and what's on

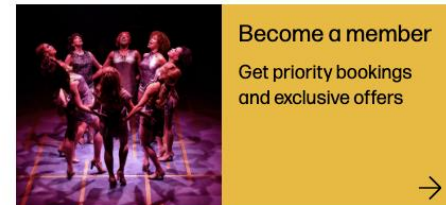


Promote multi-buy discounts to increase frequency



We offer a number of packages and discounts to make booking that bit easier and more affordable.

From season tickets, access discounts, great rates for schools and groups, as well as discounted tickets for those early bookers, we have something for everyone.



Discount schemes targeted at older audiences

- Number of attractions offer heavily discounted schemes for recipients of Universal Credit, Pension Credit (London Zoo and Whipsnade Zoo, Bolton Octagon, RHS Gardens)

NEWS

NEW £4 TICKET SCHEME LAUNCHED FOR LOW-INCOME HOUSEHOLDS IN BOLTON

10 APR 2024



How venues are using findings





ROYAL
OPERA
HOUSE

Isabella Anderson
Senior Insight Manager

Reassurance internally

- Understanding where we sit in **sector-wide trends**
- Increased digital marketing, focus on growing young audiences are **not putting off older audiences**



Reassuring the market

- Artistic excellence for ‘guaranteed quality’
- Investment in accessibility
- Reducing the risk: refunds and ticket insurance



Realignment

- Shifting our mindset for the ‘new normal’
- Informing strategies to encourage frequency
 - ROH has seen lower frequency of attendance, not overall lower audience volumes
 - And this trend is not limited to our older audiences
 - Trialling changes, including offers to reward repeat bookers



The V&A is taking a different approach

- Meeting older audiences where they are



Q&A



Thank you



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