THOUGHT LEADERSHIP AT DJS RESEARCH

Five key takeaways from the DCMS Participation Survey 2024

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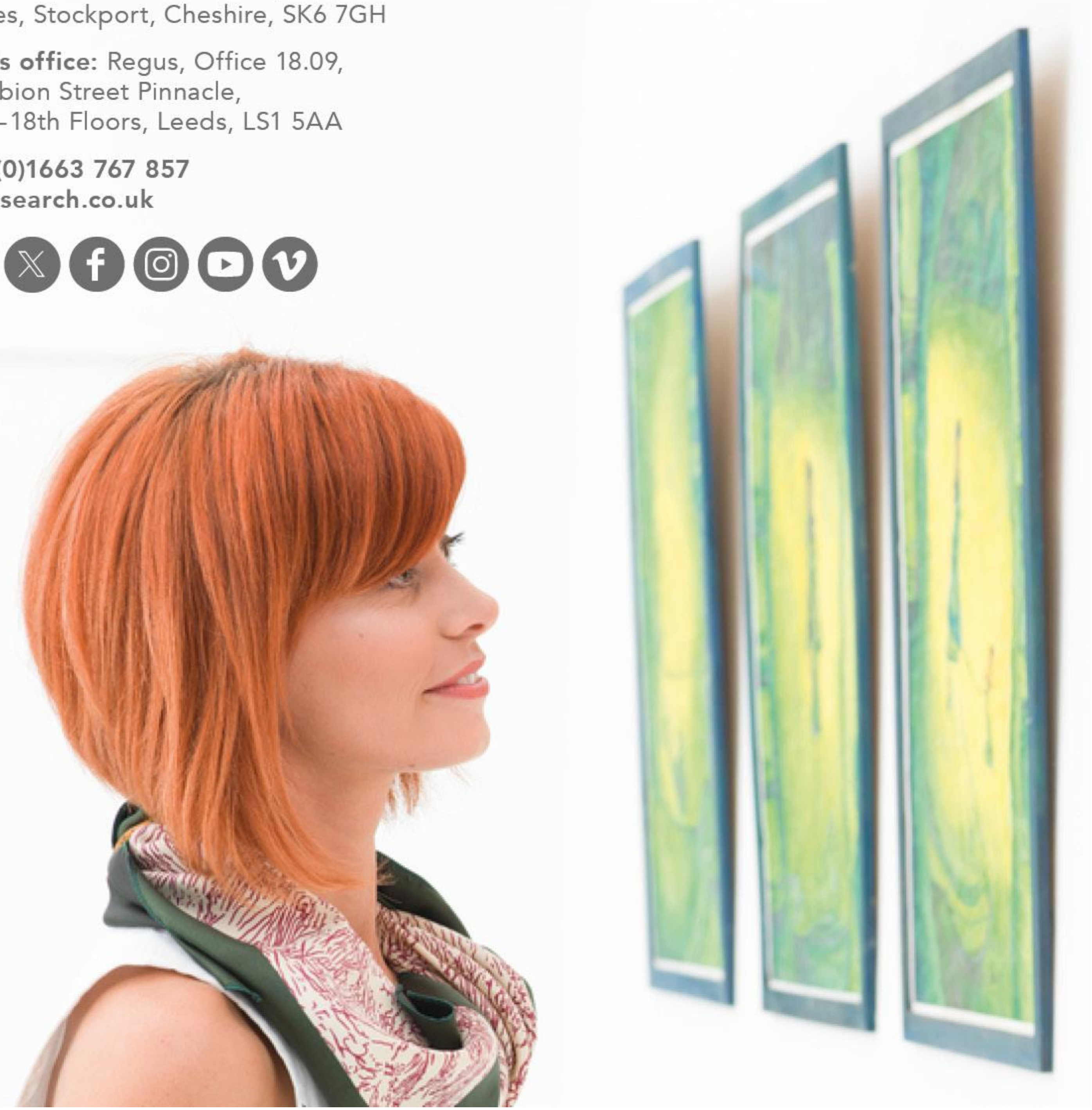

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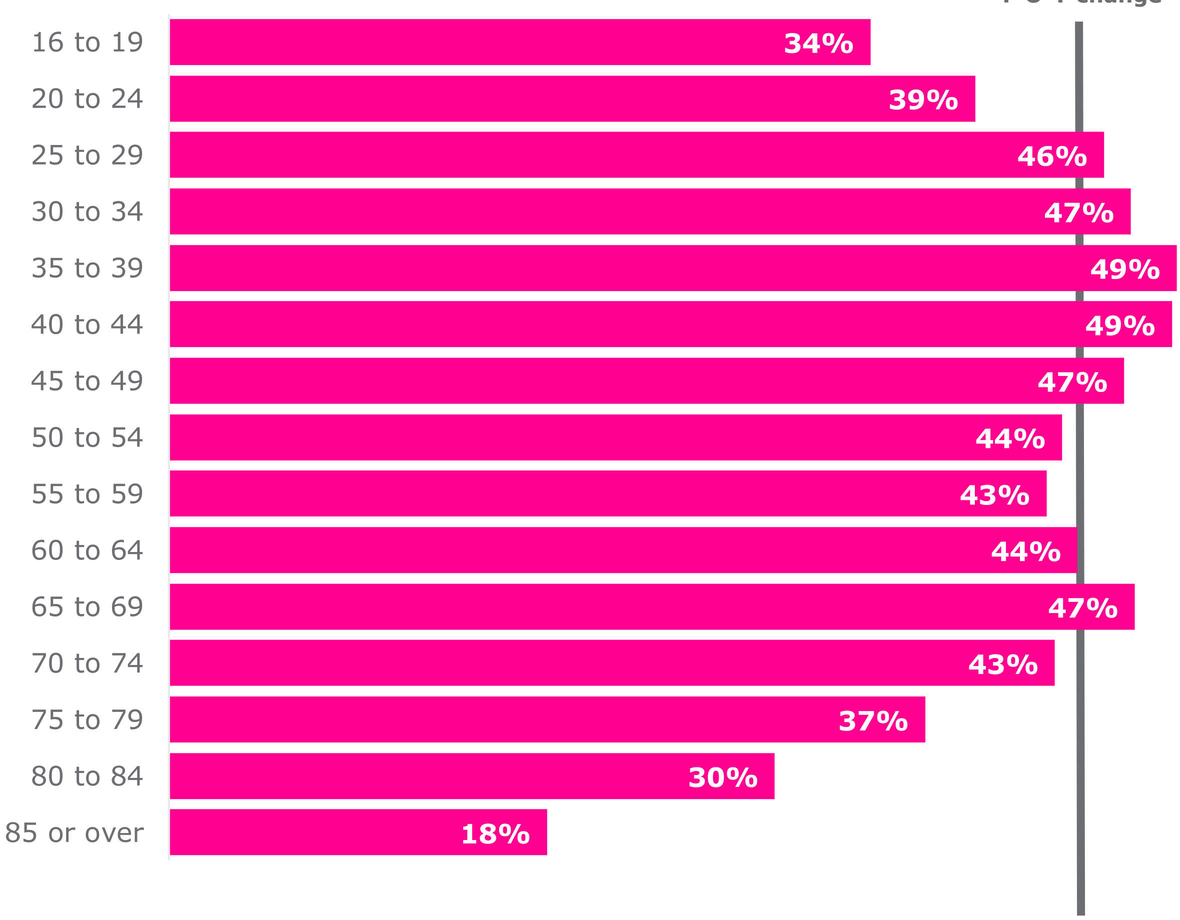
1. Young people are among the least likely to visit a museum or gallery

The headline narrative for museum and gallery visits is good – a 10-percentage point increase in the proportion of adults visiting in a 12-month period.[1] But as we might expect this isn't uniform growth.

For cohorts between 25 and 79, the proportion who have visited is up by between 10 and 12 percentage points, but for 20 to 24s, this increase is only +6 percentage points, and for 16 to 19s, no statistically significant increase is detected.

Put simply, under 25s have historically been less likely to visit than older adults, and they now aren't returning as quickly.

Visited a museum/gallery in person: past 12 months



[1] from 33% in 2022/23 to 43% in 2023/24.

There are a lot of possible reasons for this, and while it's hard to apportion cause or measure effect size, it's clear that young adults today face a whole host of challenges. The "cost of living crisis" has a disproportionate impact on young people, limiting their ability to fully participate in society.[2]

- Students are taking on increasing amounts of paid work to afford their accommodation and living expenses.[3]
- Under 21s are eligible for a significantly lower minimum wage:[4] 18 to 20s receive only 73% of the full minimum wage and 16 to 17s receive only 66%. Apprentices also receive the lowest rate while they are under 19 and/or in the first year of their apprenticeship[5]
- For those eligible for Universal Credit, under 25s receive less than 80% of the amount received by over 25s.[6]
- The number of 16 to 24s who are not in education, employment or training is also increasing, from 10% 2021 to 12% in 2023.[7]

In a reversal of historic trends, young people now exhibit the poorest mental health of all ages.[8] This change is the result of a significant increase in young people experiencing "common mental disorders" such as depression, anxiety or bipolar disorder, from 24% in 2000 to 34% in 2021/22. Young adults who have a mental disorder are three times more prone to financial constraints preventing their participation in activities like sports, outings, or socialising with friends, compared to those who don't have a mental disorder.[9]

Beyond practical constraints, interest, awareness and confidence are also important to arts participation. We know that arts engagement correlates with socio-economic status, and that early exposure to museums and galleries can mediate socio-cultural barriers so it's instructive to consider educational visits to our nationally funded institutions.

[2] https://publications.parliament.uk/pa/cm5804/cmselect/cmyouth/cost-living-crisis-young-people/summary.html

[3] Ibid.

[4] https://www.gov.uk/government/publications/the-national-minimum-wage-in-2024

[5] https://www.gov.uk/national-minimum-wage-rates

[6] https://www.gov.uk/universal-credit/what-youll-get

[7] https://www.ons.gov.uk/employmentandlabourmarket/peoplenotinwork/unemployment/bulletins/youngpeoplenotineducationemploymentortrainingneet/may2024#main-points

[8] https://www.resolutionfoundation.org/app/uploads/2024/02/Weve-only-just-begun.pdf

[9] https://natcen.ac.uk/publications/children-and-young-peoples-mental-health-2023

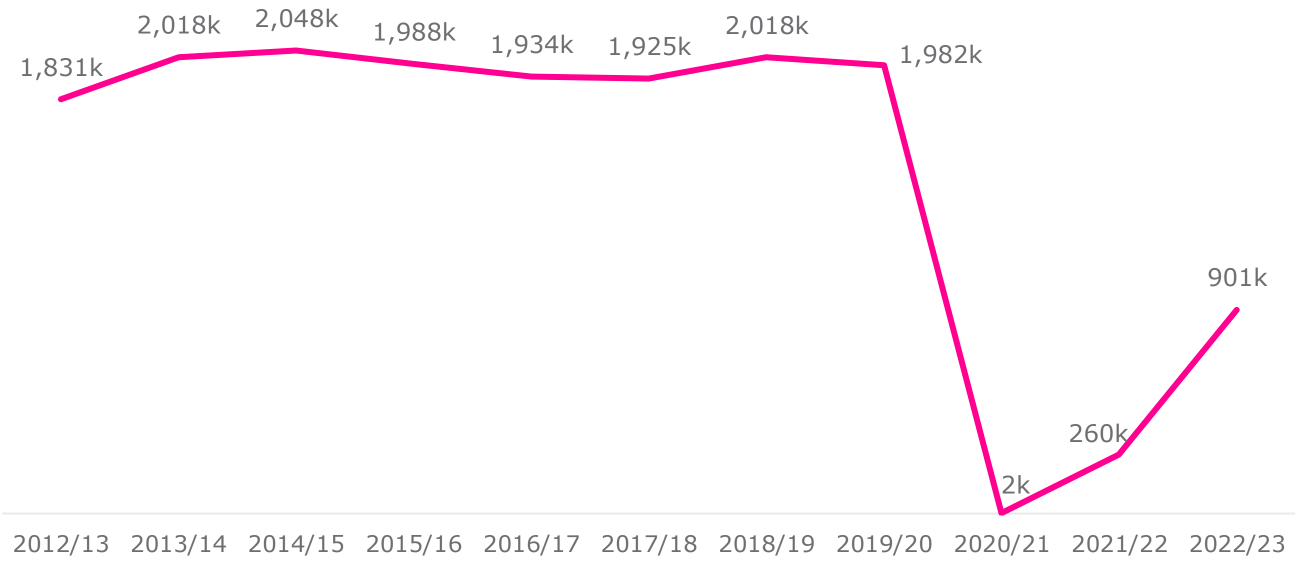
The chart below[10] shows two things:

1. Educational visits were weakening before the pandemic – after a peak in 2014/1,5 facilitated and self-directed visits to nationally funded museums and galleries decreased for the next three years and did not fully recover before the COVID-19 pandemic closed both schools and cultural institutions in 2020.
2. Since pandemic closures, engagement remains significantly below 2019/20 levels.

   The upward trend is encouraging, but the time-limited nature of formal education means there is a cohort of young people who have not received the same exposure to our nation's cultural assets as those who have come before.

Put simply, we can raise a legitimate concern that engagement might decline rather than grow in the short term.

Facilitated and self-directed visits by under 18s in formal education: 2012/13 to 2022/23, thousands



What does this mean for sector professionals?

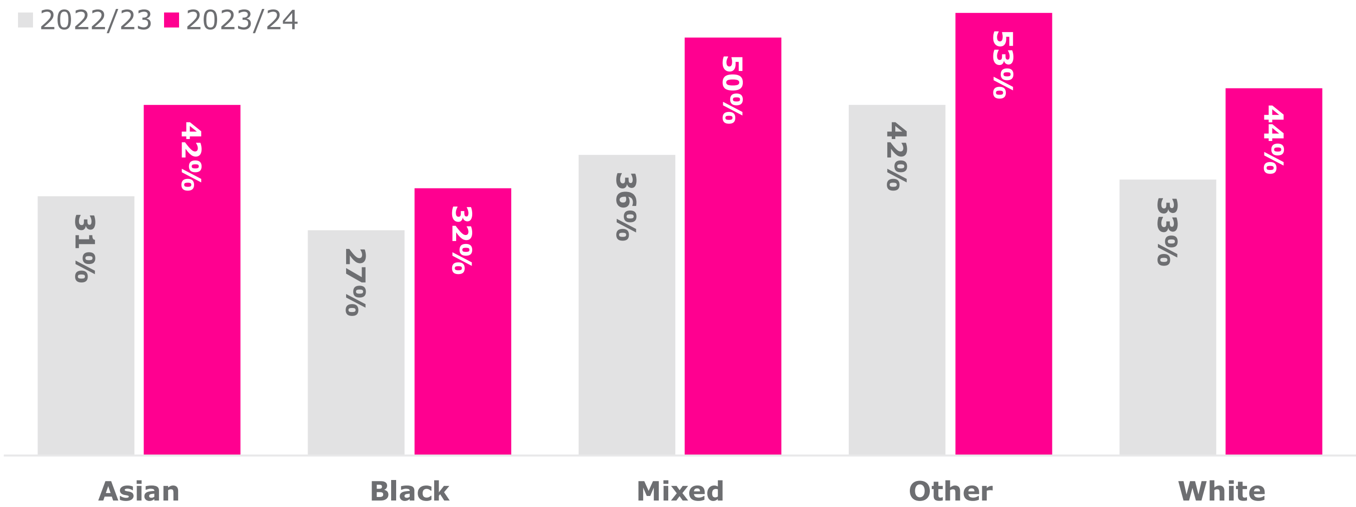
Institutions wishing to maintain engagement over time should take a life-cycle approach. Build long-term relationships underpinned through developing trust in the brand and confidence in the value and relevance of a visit. Challenging market conditions can restrict engagement, deep emotional connections are the only way to overcome these headwinds.

[10] Data drawn from https://www.gov.uk/government/statistics/dcms-sponsored-museums-and-galleries-annual-performance-indicators-202223 only venues who provide data for all years are included in analysis. Museum of the Home, Tyne and Wear Museums and the National Portrait Gallery are excluded.

2. Cultural venues still **don't reach** the whole population equally effectively

This is not "new news" for anyone connected to the cultural sector. However, the most recent release starkly illustrates the differences within as well as between different ethnic groups.

Visited a museum/gallery in person: past 12 months



At the level of broad ethnic groups, engagement has increased within four of the five categories, except for Black and Black British Ethnicities.

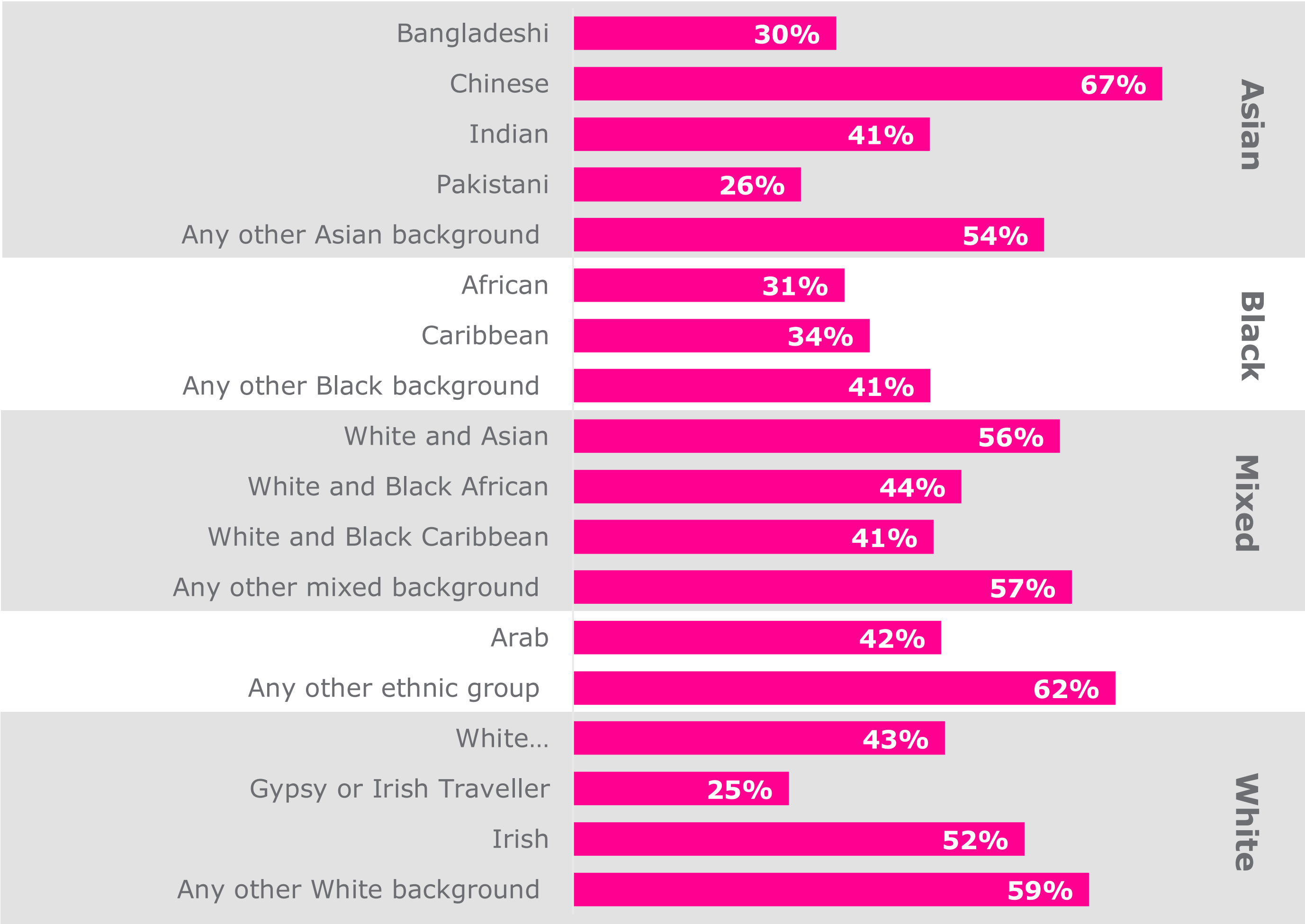
When we drill down, we also see marked variation within different ethnic groups:[11]

- There are substantial differences within Asian ethnicities – Pakistani and Bangladeshi adults are less than half as likely than Chinese adults to have visited a museum or gallery in the past 12 months.

[11] Full label for "White…" ethnic group is: English or Welsh or Scottish or Northern Irish or British

- Among mixed ethnic groups, White and Black African and White and Black Caribbean adults are less likely than White and Asian adults to have visited.
- Within White ethnicities Gypsy and Irish Traveller peoples[12] are significantly less likely to have visited in the past 12 months.

Visited a museum/gallery in person: past 12 months

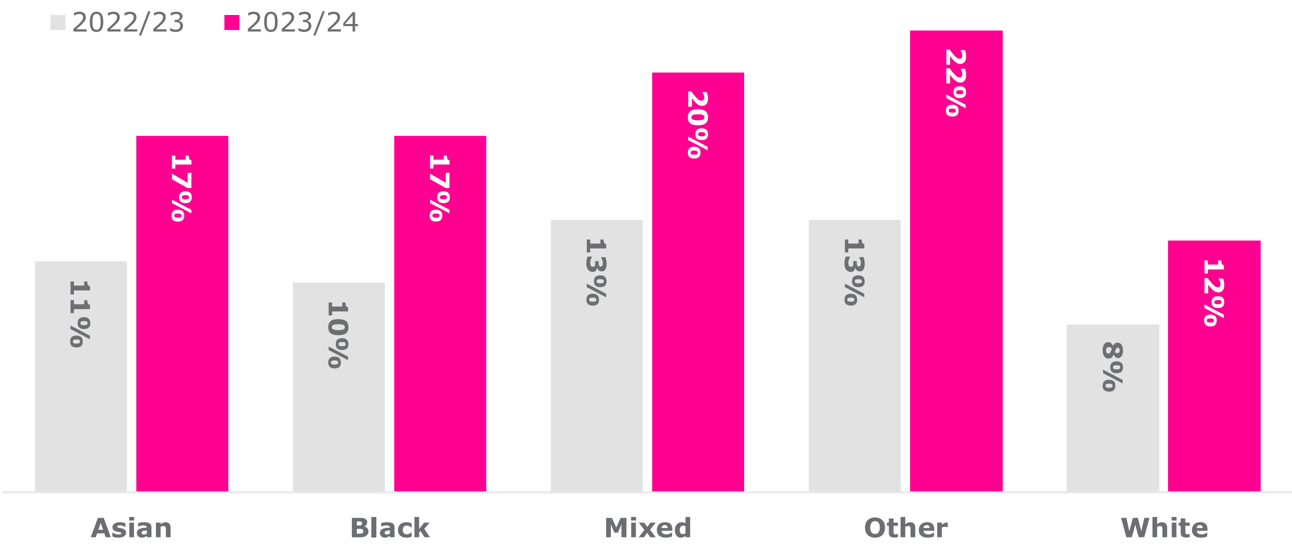


[12] Our analysis is constrained by the categories used in the original survey. We acknowledge that "Gypsy or Irish Traveller" does not fully capture the range of ethnic identities that exist within the Gypsy, Traveller and Roma communities in the UK.

Conversely, and somewhat encouragingly, when we look at digital engagement, we see some differing patterns:

- Smaller gaps between the broad ethnic groups
- Growth in engagement among Black ethnic groups

Used museum or gallery digital services: past 12 months



- Similar levels of digital engagement within Asian ethnicities: Bangladeshi (16%) Chinese (20%) Indian (18%) and Pakistani (15%).
- Higher levels of digital engagement among Gypsy and Irish Traveller peoples (40%) than other White ethnicities: White British… (12%), and Irish (24%).

These differences highlight the importance of not reducing ethnic diversity to single KPIs or even broad ethnic groups and to remaining alive to the nuance of different cultures and histories and how they relate to your specific collections.

What does this mean for sector professionals?

While it is important to continue dedicated work on diversity and inclusion, the breadth and depth of change required will necessitate embedding inclusion in all aspects of an institution's operation. For every project, practitioners should be asking:

- "What does this mean for our priority audiences?"
- "Will this initiative help or hinder efforts to improve access to and engagement with our collections?"
- "Does this project give sufficient voice to historically under-represented or marginalized voices? Can they contribute on equal terms, and will they receive equal remuneration for their efforts?"

I've spoken at the Visitor Studies Group annual conference about one practical example of inclusive practice: creating an inclusive segmentation system. You can read more about that here.
[https://www.djsresearch.co.uk/news/article/Taking-a-more-inclusive-approach-to-audience-segmentation]

My colleague, Vicky Mullius, https://www.djsresearch.co.uk/about/person/417 has also written about several brilliant case studies from across the sector, showcasing how institutions can centre inclusive practice within audience development.
https://www.djsresearch.co.uk/knowledge/article/Headlines-from-the-Visitor-Studies-Conference-2024

3. Digital is part of the eco-system

The participation survey used a specific definition of digital engagement, which went beyond visiting a website for practical information and focused on digital engagement with the collections or other related content.

Headline data shows that both physical and digital engagement have increased year-on year.

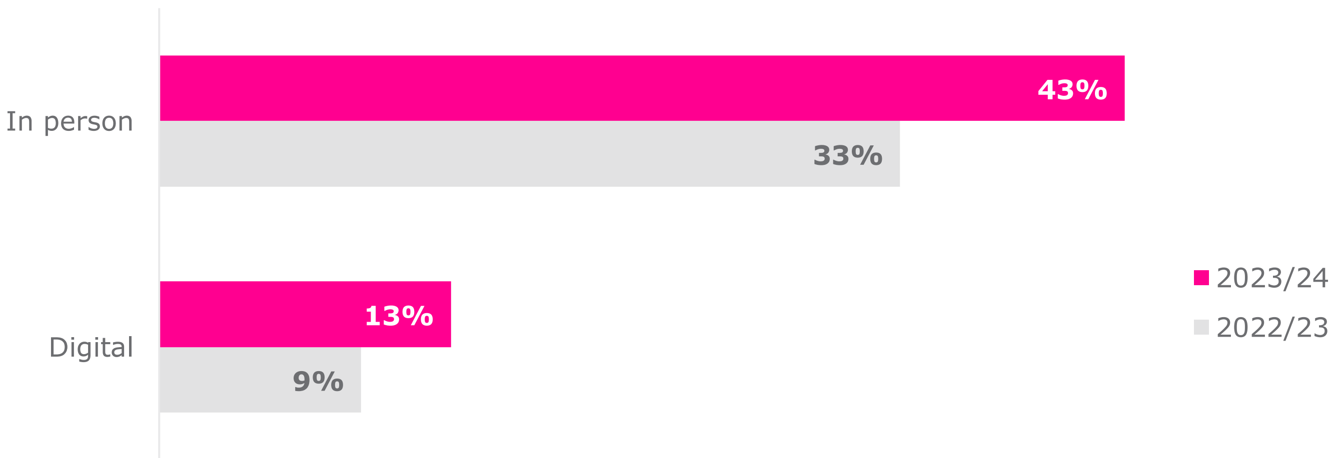
Survey definition

"Taken a virtual tour of a museum or gallery in England.

Researched items from a museum or gallery collection in England online.

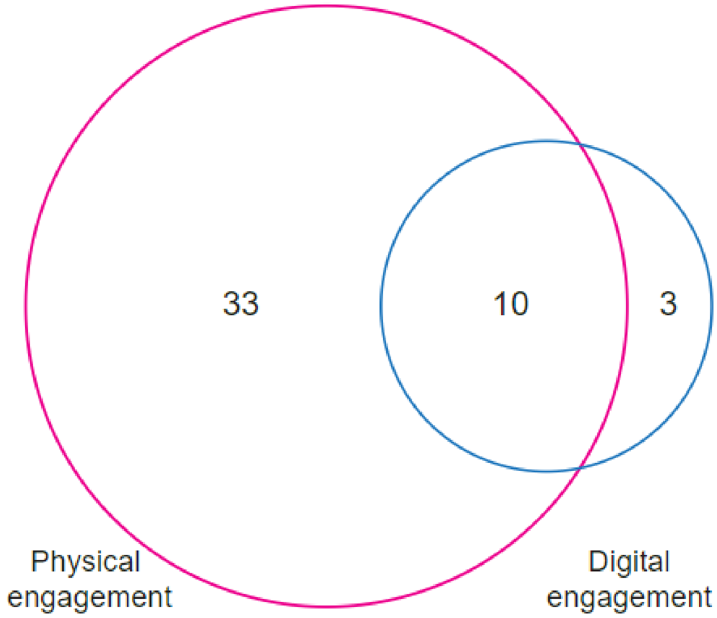
Engaged with text, image, audio, video, or animation, games, or podcast content from museums in England."

Engagement with a museum or gallery in the past 12 months: in person and digital



It also shows that crossover between physical and digital engagement is very high: around three quarters of those who have interacted digitally in the past 12 months have also made an in-person visit.

Physical and digital engagement with museums and galleries, England: 2023/24



What does this mean for sector professionals?

Gone are the days when "digital" can be treated as a separate workstream. Institutions should see their physical and digital presence as mutually re-enforcing and seek to develop integrated customer journeys.

It's important that digital isn't seen as "second best" or put on as a consolation for those who can't make a physical visit. Digital offers different experiences, different ways to connect and maintain engagement, and many visitors can and will use both.

We've seen this in practice when we undertook an in-depth study of digital audiences for the Museum of London (now, London Museum). This study highlighted that while the website is a functional facilitator for physical visits, the broader digital eco-system of social media, online events and other collection access tools help build relationships and ultimately drive ongoing physical and digital engagement.

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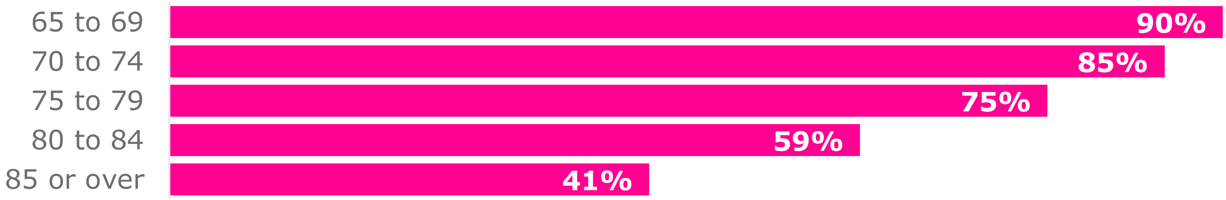
4. Older people are still at risk of digital isolation

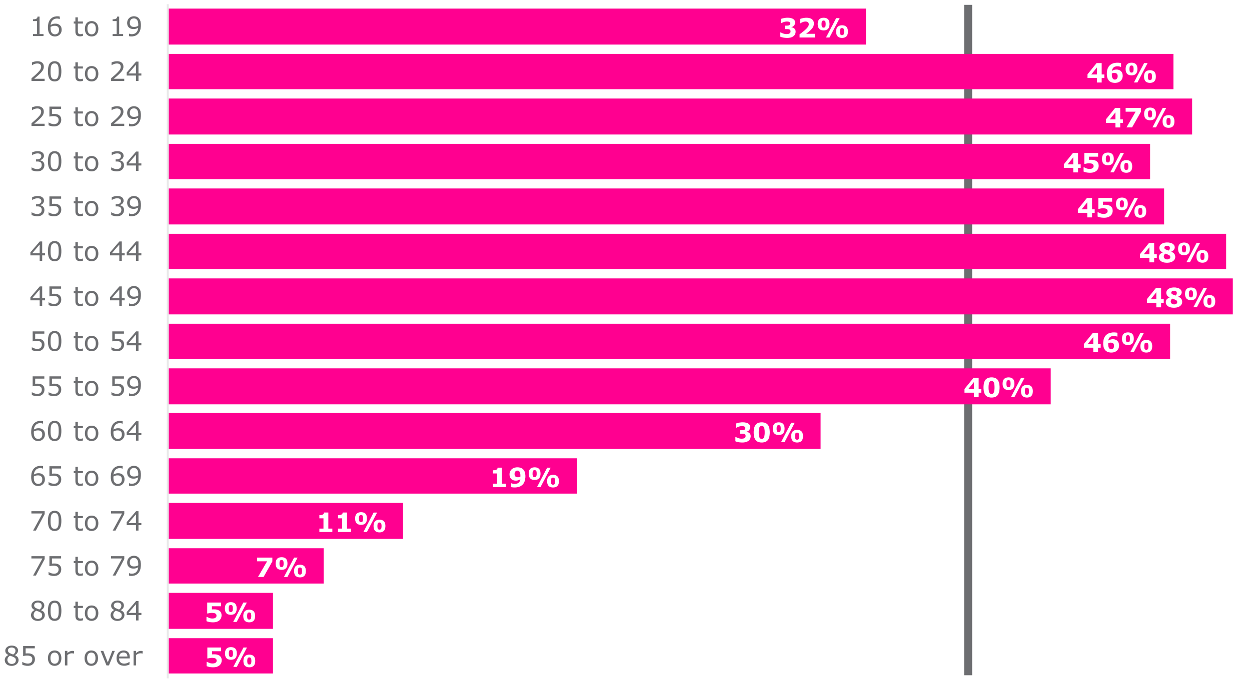
Having advocated for the central role of digital provision in contemporary professional practice, I must also sound a note of caution. While uptake is growing, there are groups of the population who either cannot or do not engage digitally. One of the strongest correlates of this is age. Below age 65 use of the internet is near-universal (at or above 95%), however for older age cohorts, engagement drops rapidly.

Use of the internet: 2023/24



At the same time, older age cohorts are also less likely to have accessed training in digital or online skills. This is partly due to working-age adults being given training within their employment, but it also underscores the broader lack of digital engagement among the oldest adults.

Adults who did digital or online skills training: past 12 months



Of course this has much wider ramifications beyond access to culture, Ofcom's 2022 Digital Exclusion Review highlights "ability" alongside "access" and "affordability" as the three key barriers to full participation in a digitally integrated society.[13] The push towards cashless businesses,[14] app-only access to services,[15] and closures of bank branches,[16] all make it more difficult for people who aren't digitally confident to fully participate.

Digital adoption is only accelerating, meaning that those without the right skill set are at increasing risk of being left behind.

What does this mean for sector professionals?

The cultural sector could not (and should not attempt to) stop the adoption of digital tools, but it can treat digital skills as an access consideration. We know that people have different requirements for access to an in-person a visit – from physical mobility to information format and sensory needs. We should see our digital tools and interventions in the same way – practitioners should ask themselves how a range of people can access their digital provision and should be wary of completely removing non-digital tools lest vulnerable audiences are excluded.

[13] https://publications.parliament.uk/pa/ld5803/ldselect/ldcomm/219/21905.html

[14] https://www.theguardian.com/commentisfree/2024/may/01/the-guardian-view-on-the-cost-of-a-cashless-society-the-most-vulnerable-will-pay

[15] https://www.theguardian.com/technology/2023/aug/20/no-app-no-entry-how-the-digital-world-is-failing-the-non-tech-savvy

[16] https://lordslibrary.parliament.uk/closure-of-high-street-banks-impact-on-local-communities

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5. Elite women's football is capturing the nation's attention

This isn't strictly about cultural audiences, but I wanted to finish on a positive note, and I do think it has relevance.

I'm old enough to remember Euro '96, and all the coverage of the England Men's team. I wasn't exactly "sports mad" but I'd never seen coverage of Women's football, and subsequent research has confirmed that most female players of the time were not full-time sports people. Indeed, even the Women's Super League,[17] didn't become a fully professional league until 2018.[18]

In this context, seeing awareness and engagement statistics for the UEFA Women's 2022 Euros is heartening, perhaps even a little moving.

Headline awareness was 67%, with almost identical awareness across men and women.[19] Participation was also high – 38% of those who were aware participated in the event, most commonly following the coverage (94%).

But what's far more exciting is the impact that the 2022 Women's Euros has had on women's football more generally. UEFA's own impact study[20] shows that:
"In England, the total attendance during the 2022/23 Women's Super League (WSL) season surpassed 680,000, 172% higher than the 2021/2022 season, with average attendance per game-week nearly tripling"

The same report also quotes statistics from the Football Association which show a *"140% increase in participation levels in the season following the tournament, followed by women aged 16 and older (53% increase). This amounts to 2.3 million more women and girls playing football post-tournament compared to the prior season."*

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[17] https://womensleagues.thefa.com

[18] https://www.bbc.co.uk/sport/football/45355268

[19] Female 66.7158250950932%, Male 67.2387795789433%.

[20] https://www.uefa.com/news-media/news/0283-186d13be214d-1d7ff6f2e858-1000--uefa-women-s-euro-2022-one-year-on-impact-study-shows-major

84% of surveyed spectators say that UEFA Women's EURO 2022 has improved their perceptions of women's football.

What does this mean for sector professionals?

For me, the big takeaway here is that **change is possible**. I don't want to understate the incredible amount of hard work that's gone on to get us this far. Time and money, campaigning and lobbying, no doubt blood, sweat and tears from the athletes and their friends and families. But it has happened. And I hope this means that we as engaged professionals can also overcome the structural and systemic challenges that hold our sector back. It will take sustained hard work, time and money, campaigning and lobbying (although I hope less blood, sweat and tears than I see in international sport), but it can be done.

In closing…

Thank you for reading, I hope you found this useful or at least interesting. There's plenty more to explore in the Participation Survey. You can read the main report here: https://www.gov.uk/government/statistics/participation-survey-2023-24-annual-publication/main-report-for-the-participation-survey-may-2023-to-march-2024

You can access the data tables I used here:
https://www.gov.uk/government/statistics/participation-survey-2023-24-annual-publication

Other data sources are referenced throughout.

If you've got a question or you'd like to talk more about how audience insight can inform your work, you can contact me rgreen@djsresearch.com