ARTS COUNCIL MALTA

AUDIENCE RESEARCH

A STUDY OF AUDIENCE ATTITUDES, PERCEPTIONS, AND BEHAVIOURS

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Executive Summary

The overall objective of the study was to gain an understanding of audience attitudes, perceptions and behaviours in relation to participation in arts and culture in Malta, with a specific focus on how public cultural organisations can address audience development in this regard.

Changes brought about by the COVID-19 pandemic throughout 2020 have altered the landscape of cultural activity, bringing to the fore new considerations related to attendance to public gatherings. The study sought to attain more insight on the nature of these concerns, and the extent to which they will shape attitudes and behaviours of potential audiences as well as the longer-term effects on the cultural and creative sector of the disruption brought about by the COVID-19 situation.

A mix of both qualitative and quantitative research tools were adopted. The former comprised desk research and a number of focus groups. The quantitative research revolved around 3 waves of surveys that targeted the general public that were carried out through computer-aided-telephone-interviews (CATI). Each wave comprised a minimum of 500 completed surveys. This ensured a 95% confidence level with a margin of error of plus or minus 4.3%. Data was representative of the local population in terms of gender, age (18 and over) and regional distribution.

Main findings:

Attendance/participation

- Overall, 73% of respondents have attended one or more of the arts and cultural events under review in the 12 months preceding COVID-19.
- Following the easing of lockdown restrictions, respondents have not returned to attending events in-person at the same frequency that they did prior to lockdown, with all events under review attaining a score of 5% or less.
- The intention to attend in-person events is increasing (although a general reluctance persisted), with respondents in the third wave expressing a higher level of interest in attending physical events in the future, compared to the previous two waves of data collection.

Online engagement

- During lockdown, the number of people that shifted to following cultural events online was low. Of the various arts and culture events under review, concerts and theatre were the most followed with 7% mentions each.
- Individuals are not inclined to increase their participation in arts and cultural activities online when compared with the previous 12 months (prior to COVID-19). The survey has indicated that over time individuals felt less inclined to attend cultural events online.
- On the whole, respondents were not keen of the idea of paying for online content. This lack of willingness to pay for online content was consistent throughout the three waves of data collection.

Financial spend/support

- 55% had not spent any money on tickets for arts and culture events in the 12 months prior to COVID-19. A further 23% spent less than €50. Such propensity not to spend continued when arts and culture shifted online, with a total of 91% not spending any money on online cultural activity.
- Respondents seemed to appreciate the adverse effects COVID-19 had on the industry with 44% being willing to pay for events that were previously free. Furthermore, 37% indicated that they were willing to pay a price up to 10% higher than the regular average ticket price to attend a cultural event.
- Overall, one fourth of respondents noted that they would be willing to accept giving a donation every time they participated in an online event. Furthermore, with a total of 59% of responses in the final survey stating that they would be willing to give a one-time donation.

Recommendations

- Build and maintain an audience database as a means of understanding your audience. This will enable entities to design a programme offering that truly meets audience needs and consequently their willingness to financially support their organisations. It will in turn help entities develop more long-lasting audience engagement strategies and increase the value of their audience.
- Strengthen relations with local community groups in order to increase the collective value, resilience and social purpose of the organisation.
- Dedicate resources to building networks and relationships with entities operating outside the immediate cultural sector. Engaging with fields such as healthcare and social services, for instance, has the potential to bring about benefits related to higher levels of well-being and a lower sense of social isolation amongst audiences.
- Embrace co-creation as a central principle within the development of the entity's cultural programme.
- Focus efforts on building digital capacity, making it an integral part of the organisation's operational practice.
- Explore the possibility of working more closely with other PCOs and having a common platform/channel to better target specific audiences.
- Support cultural and creative entrepreneurship as catalysts of new models of economic and social value creation.

1. Methodology

1.1 Aims of the study

The objective of this study was to gain a deeper understanding into the attitudes, perceptions and behaviours through which audiences engage with arts and culture in Malta, with a particular focus on the role of Public Cultural Organisations. These attitudes, perceptions and behaviours are subject to ongoing transformation, in line with ever-changing social and economic realities. These changes were drastically accelerated with the onset of the COVID-19 pandemic, which has significantly altered the landscape of cultural activity throughout 2020 and 2021, bringing to the fore new considerations related to attendance to public gatherings. The study thus sought to determine to what extent behavioural attitudes towards arts and culture have altered over time; both in relation to past research and in terms of changes caused by the COVID-19 pandemic. This study also aimed to predict the longer-term changes by seeking to determine whether changes in behaviour, perceptions and attitudes were short term remedies with individuals reverting back to 'old habits' or indeed are likely to alter behaviours for the months and years to come.

Furthermore, this study sought to examine how Public Cultural Organisations can be better equipped to face these changes through the development of strategic actions to support their efforts in engaging with their audiences. In this way, the study aims to enable the local cultural sector to prosper, by developing a more holistic understanding of how to identify, communicate with new audiences in an ever-changing context.

1.2 Methodology

1.2.1 INTRODUCTION

This study incorporated a mixed-method approach, that comprised both qualitative and quantitative research instruments.

1.2.2 QUALITATIVE RESEARCH

Desk research

At the onset, desk research on relevant themes was carried out. Such review and analysis related to existing documentation about topics such as governance, programming, marketing, strategy and similar. An extensive review of international publications was also carried out.

Such secondary data aided in the drawing up of the questionnaire and also helped us to clarify/determine trends.

Focus Groups

A total of three focus groups were carried out.

Two focus groups were organised at the start of project with the partner stakeholders. This was done to ensure that the PCOs that are the subject of this study were involved from the onset.

The emphasis of the discussions related to the questionnaire that was to form an integral part of the quantitative research. During these sessions, the different PCOs in attendance discussed in detail various aspects they felt that the survey ought to incorporate, while remaining within the remit of the study. Among the elements that were discussed and eventually incorporated into the study were questions to determine respondents':

- Payment preference to online viewership/participation in arts and culture
- Inclination to financially support the arts and culture industry.

The initial survey draft was consequently amended, with the final version being distributed to all PCOs one last time for their review prior to launching the CATI.

1st focus group session:

- Date: 13/10/2021
- Time: 10:30am

TABLE 1: LIST OF PARTICIPANTS

Name of Organisation
Arts Council Malta
EMCS Ltd
Valletta Cultural Agency
Teatru Malta
Malta Philharmonic Orchestra
MICAS
Pjazza Teatru Rjal

2nd focus group session

- Date: 16/10/2021
- Time: 12:30pm

TABLE 2: LIST OF PARTICIPANTS

Name of Organisation
Arts Council Malta
EMCS Ltd
Mediterranean Conference Centre
Festivals Malta
Teatru Manoel
ŻfinMalta
Spazju Kreattiv

Furthermore, prior to completing the final report, a workshop was also organised with the partner stakeholders to discuss the salient points derived from the research.

The comments and feedback collated then enabled the key experts to fine tune the report prior to presenting the final document.

3rd focus group session

- Date: 21/10/2021
- Time: 10:00am

TABLE 3: LIST OF PARTICIPANTS

Name of Organisation
Arts Council Malta
EMCS Ltd
Mediterranean Conference Centre
Festivals Malta
Teatru Manoel
Valletta Cultural Agency
Spazju Kreattiv
Teatru Malta
Malta Philharmonic Orchestra
Pjazza Teatru Rjal

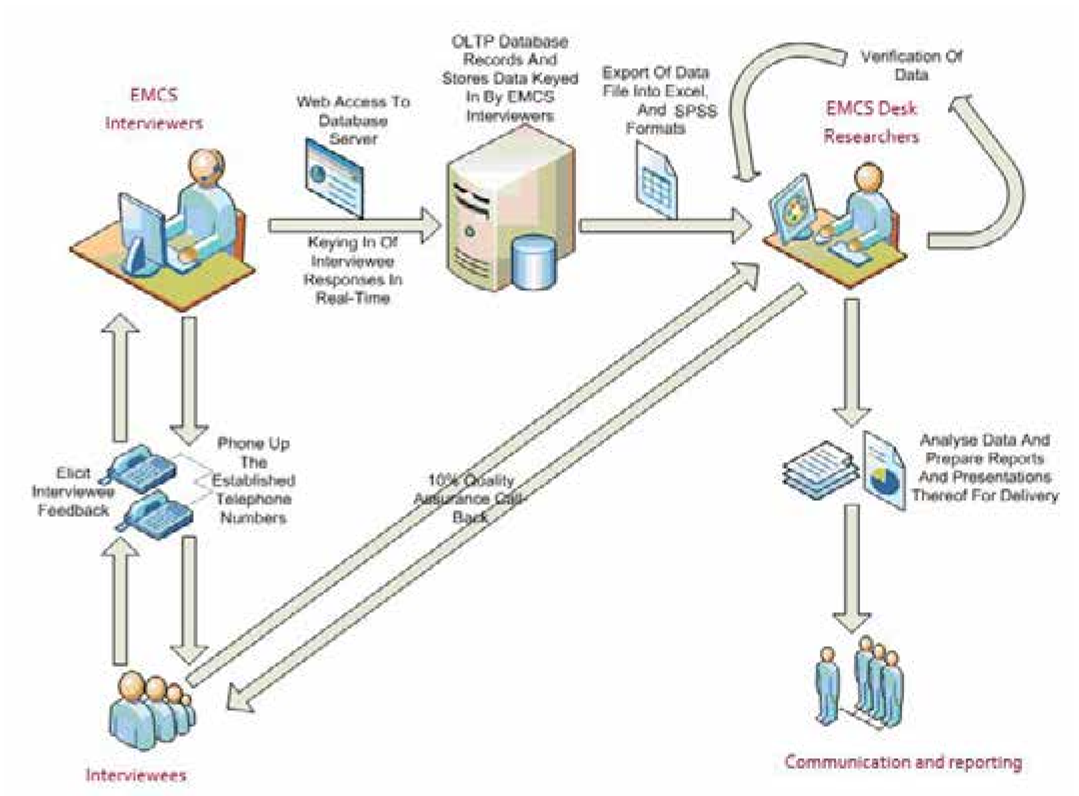
1.2.3 QUANTITATIVE RESEARCH

In order to collate and produce longitudinal data, a total of three waves of surveys were carried out throughout the project. Furthermore, to ensure comparability of data, there were minimal alterations to the survey questions between each wave of surveys.

The survey focused on the following issues:

- Changing patterns of participation in arts and cultural events and sites;
- Interest and intention to attend and participate in future arts and cultural activities;
- Conditions that may boost public confidence in returning to arts and cultural events/sites following the current disruption;
- Participation and interest in digital and online arts and cultural experiences;
- Opinions on actions taken by private and public cultural organisations as a response to the COVID-19 situation and the resulting social dynamics, including trust and confidence in cultural institutions;
- Changes over time in the issues listed above, in light of ongoing uncertainty, not exclusively, but with a special focus on the COVID-19 situation;
- The operations, administration, management and governance of the public cultural organisations;
- The extent to which public cultural organisations can adapt audience development strategies that would render them more self-sustainable within their legal remits;
- How public cultural organisations could collaborate more with each other especially in terms of their programming and resources in a cost-effective manner through an audience-centred approach.

FIGURE 1: COMPUTER AIDED TELEPHONE INTERVIEWS (CATI) PROCESS



1.3 Demographics

FIGURE 2: DEMOGRAPHICS: GENDER - POPULATION AND SAMPLE

Data extracted from NSO Publication: Trends in Malta

Sample Demographics

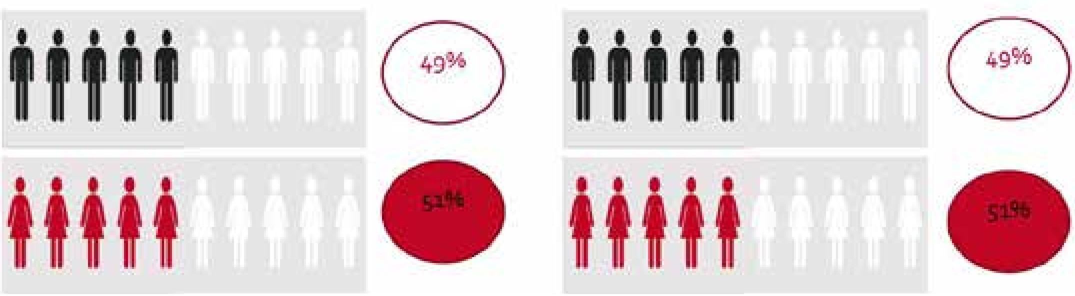


FIGURE 3: DEMOGRAPHICS: REGION - POPULATION AND SAMPLE

Data extracted from NSO Publication: Trends in Malta

Sample Demographics

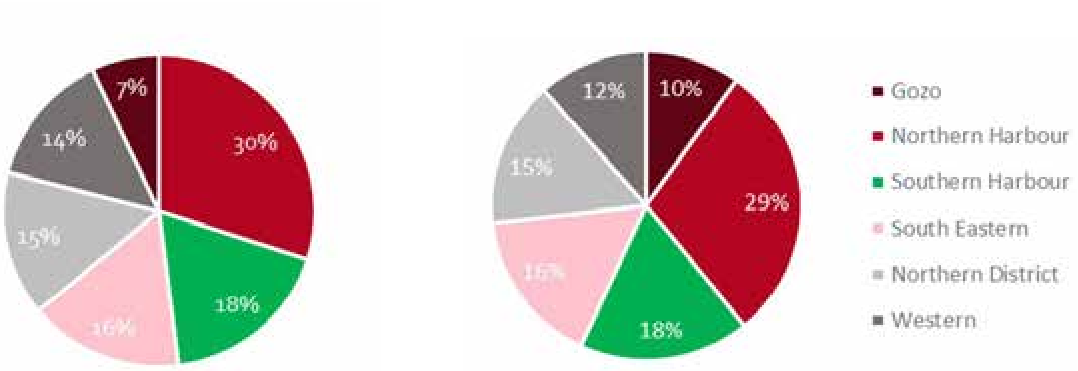
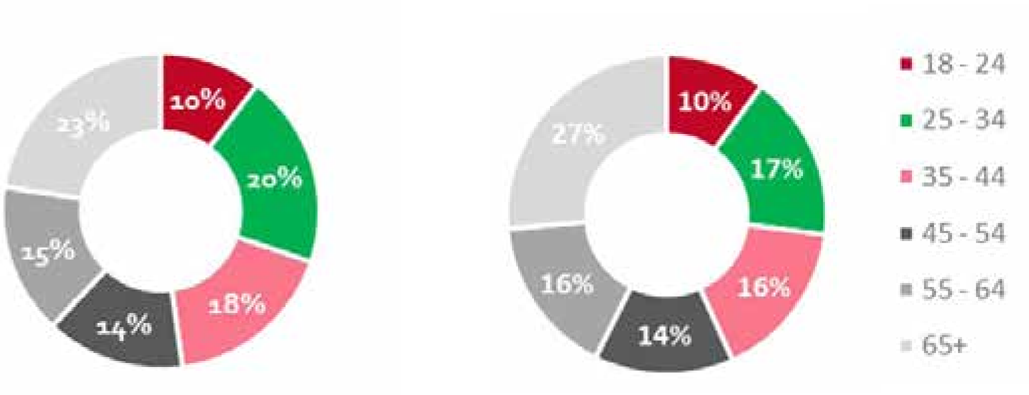


FIGURE 4: DEMOGRAPHICS: AGE - POPULATION AND SAMPLE

Local Demographics - Data extracted from NSO Publication: Trends in Malta 2016

Sample Demographics



The studies were carried out as follows:

Wave 1: This research study was carried out between Monday 23rd November and Tuesday 15th December 2020.

Wave 2: This research study was carried out between Monday 25th January and Friday 19th February 2021.

Wave 3: This research study was carried out between Monday 5th July and Friday 30th July 2021.

Surveys targeted the general public and were carried out through computer-aided-telephone-interviews (CATI). This method was deemed to be the most apt method to ensure that the random sample indeed also incorporated individuals who are not technology/ internet/ email savvy. Each wave comprised a minimum of 500 completed surveys[1]. This ensured a 95% confidence level with a margin of error of plus or minus 4.3%. Data was representative of the local population in terms of gender, age (18 and over) and regions (as determined by the Ministry for National Heritage, the Arts and Local Government whereby Malta is split into 6 distinct regions).

In view of the request to provide meaningful data also for the individual public cultural organisations that fall under the Council's umbrella, wherever possible, a questionnaire was also drawn up for those entities holding a database of their audience. In such instances a distinct questionnaire was drawn up, uploaded online and the link was subsequently distributed by the individual entities holding such database for them to distribute. Filled in questionnaires were collated in our online system and subsequently analysed.

1.4 Quality

In line with normal practice when conducting surveys, EMCS had individuals that were responsible for the testing of the questionnaire once this was agreed to with the client. Furthermore, another important aspect of any project, and consequently this too, related to quality control.

Numerous controls were thus carried out throughout the various stages of the research, namely during:

Sample Design Quality assurance in the sample design process was done in two dimensions:

- Determining the sample size;
- Determining the most apt method for ensuring how the sample was targeted so as to ensure that the greatest possible probability that each member of a target population has a chance to be sampled;

1 In Wave 1 a total of 540 completed surveys were analysed, in Wave 2 a total of 504 completed surveys were analysed, and in Wave 3 a total of 525 completed surveys were analysed.

Questionnaire design

A careful and well-designed questionnaire ensures quality data. We employed several mechanisms so as to ensure that the questionnaire adhered to the best standards of the industry. The questions were generated by a panel of experts with experience in conducting telephone surveys of a similar nature.

Once the draft questionnaire was agreed to, the interpretation of questions was tested in order to understand possible ambiguities in comprehension. The question order was then reviewed to avoid suggestive priming. Following this, the interview duration was tested and adjusted to avoid interviewee fatigue. Once a working draft of a questionnaire was achieved, a pilot test on 10 respondents was administered as a final check.

Interviewer training

All interviewers had extensive experience and are highly skilled in conducting telephone surveys. Notwithstanding their level of expertise, researchers (including those working on this specific project) were trained on the specific project at hand. This ensures that ambiguity of responses is minimised.

Researchers were also given a refresher course as to the various techniques that may be employed to achieve higher response rates. Such training activities ensure that every researcher covers the field in a standardised manner.

Data Collection

During the data collection, comprehensive supervision was carried out over the process. About 10% of the sample was supervised and controlled. Furthermore, circa 10% of the interviews were monitored by listening in during the survey data collection, which provided a review of the work of the researcher.

Data Entry

By using a CATI system during the telephone survey, data entry is part of the data collection process. At the same time, our CATI system ensures the quality of the collected data by applying part of the validation during the collection process. Skip logic validation and basic logic validation prevents cases where mandatory answers are missing, or extra data is being collected.

Data cleaning

This is a fundamental stage as the quality of the data invariably reflects on the proposed output deliverables. During the data cleaning stage, the expert determined inaccurate, incomplete or unreasonable data and then improved the quality through correcting of detected errors and omissions. Such a process reduces errors and improves the overall quality of the data. The main data cleaning processes carried out related to:

I. Editing,
II. Validation,
III. Imputation.

Analysis

Once data cleaning was complete, EMCS utilised the necessary programmes to analyse such information.

This study sought to determine locals' response to the pandemic and determine tendencies - both distinct trends relative to the diverse organisations forming part of Malta's cultural ecology and commonalities that are likely to be experienced across the board. This study commences with a snapshot of the current situation, with the longitudinal quantitative survey aimed at determining consumer trends over time. The desk research aided both in designing the questionnaire and to complement the survey results and subsequent conclusions and recommendations.

2. Literature Review

2.1 Overview

> The economic and social disruption resulting from the global Coronavirus pandemic will have a profound and lasting effect on all sectors and segments of our society. In the short term, organisations of all shapes and sizes are having to adapt and respond to the rapidly changing COVID climate, whilst the potential long-term impacts provide almost overwhelming scope for speculation.
>
> Caroline Macfarland (Director, Common Vision): Lessons from Covid-19: building a strategic vision for the future of the arts & culture sector

The COVID-19 pandemic has impacted every region, every industry, and indeed every aspect of life[2], with arts and cultural organisations being no exception. For over a year, this sector has had to deal with significant and immediate challenges, among which, the need to cope with social distancing and the partial lockdowns that were introduced throughout the period. Such measures have impacted the different strands that comprise this sector, be it:

- Venues
- Artistic programming
- Working arrangements and relationships
- Audience engagement

COVID-19 has changed life as we know it and reverting to pre-COVID practices is not an option. Consequently, entities will need to be aware of the profound implications of such a reality and gear themselves to successfully adapt to the 'new normal'. As part of this process organisations need to ask and have a clear reply to - "*What - and who - are you for*?"[3]. This is paramount if arts organisations are to remain relevant (to local communities, across the island and internationally), with relevance being deemed crucial to building resilience in the arts and culture sector.

This is particularly pertinent when one considers the realities of global employment patterns in the creative sector. An OECD report[4] notes that creative jobs are often precarious in nature, and the COVID-19 crisis has highlighted how such jobs often fall through the cracks in terms of public support. This report reveals that it is not uncommon for a creative professional to simultaneously engage in several jobs of a different nature in order to make a living, for instance by carrying out freelance work, combined with a part-time salaried job, or the combination of a main salaried job (often in a non-creative sector) with a second creative job. However, unlike several other instances of precarious employment, cultural and creative jobs are generally highly skilled, requiring high levels of specific human capital investment, and their productivity is often more difficult to assess. Moreover, such workers need not only to make a living but to maintain and cultivate their personal networks to ensure the future viability of their profession.

2 Mckinsey & Company - COVID-19: Briefing note #68, August 18, 2021. The pandemic's side effects come in many forms https://www.mckinsey.com/business-functions/risk-and-resilience/our-insights/covid-19-implications-for-business (viewed 19.08.2021)

3 Andrew Barnett. Director, Calouste Gulbenkian Foundation. Creativity, Culture and Connection. COVI.

4 Culture shock. COVID-19 and the cultural and creative sectors (2020). https://ipk.nkp.cz/docs/covid-19/dopady-covid-19

2.2 Assistance and initiatives

2.2.1 DURING COVID-19

Following the outbreak of the COVID-19 pandemic and the banning of all public gatherings and the closing of all non-essential services and stores (including those related to the creative sector) the Government of Malta sought to mitigate the economic impact of such restrictions by implementing the Covid Wage Supplement, which provided a basic wage supplement to people active in sectors deemed to have suffered drastically as a result of public health restrictions. Through this programme, people working in the creative arts - whether full-time employees or self-employed/freelance - were entitled to a monthly supplement of €800. Part-time employees within the creative arts sector were entitled to a monthly supplement of €500. Such assistance was reintroduced following the 2nd partial lockdown introduced by the Government in March 2021.

Creative practitioners working in the sectors which are considered to have been adversely, but not drastically, affected are entitled to a monthly supplement of €160 in the case of full-time employees and €100 in the case of part-time employees. Self-employed/freelancers in these sectors are entitled to a monthly supplement of €320. These sectors include publishing; motion picture video and television programming; and radio broadcasting.

From its end, Arts Council Malta, as well as other public and private organisations undertook a number of initiatives, funds and activities aimed at helping the sector overcome the financial and social challenges brought about by the pandemic in an attempt to mitigate the adversities caused by such measures.

Some of the initiatives undertaken:

- Teatru Malta launched a call for artists to send proposals to be included in its programme, with those approved getting 50% of the fees in advance. Other initiatives include a platform that will enable theatre projects to be viewed online as well as an invitation for artists to send short videos with their performances, with the ones selected being offered a fee and uploaded on social media.
- A number of grassroots activities and initiatives that are taking place online through livestreaming, including performing arts festivals and literary readings.
- A joint initiative by Arts Council Malta and the Culture Directorate - The Culture Pass, aimed at connecting schoolchildren of various ages with high-quality cultural and artistic experiences, whereby a curated online programme was developed throughout 2020 and 2021.
- Arts Council Malta launched the Malta Arts Fund Special Call and the Special Series ACMlab, the Transition Arts Task Force, and the ACMHangouts.
- Arts Council Malta launched the RESTART Schemes, a series of 12 arts investment and support schemes throughout 2021 totalling to €3.62m.
- The Government announced the Events Support Scheme, a €2m scheme aimed at making the organisation of cultural and artistic events more financially viable between the periods of 5th July and 31st August 2021. This scheme provides a mechanism through which event organisers benefit from match funding on ticket sales as well as logistical support. Organisers can receive up to a maximum total of €30,000 for their event.

2.2.2 MOVING ON

In its report on the sector, the OECD notes that the effects of the crisis on distribution channels and the drop in investment by the sector will affect the production of cultural goods and services and their diversity in the months, if not years, to come.

Over the medium term, the anticipated lower levels of international and domestic tourism, drop in purchasing power, and reductions of public and private funding for arts and culture, especially at the local level, could amplify this negative trend even further[5].

In the absence of responsive public support and recovery strategies, the downsizing of cultural and creative sectors will have a negative impact on cities and regions in terms of jobs and revenues, levels of innovation, citizen well-being and the vibrancy and diversity of communities.

2.3 Funding

The current landscape is such that, where funding is concerned, there is less to go around and an evidently greater need for it. In an article on the topic[6], Prosper North believes that cultural leaders will need to diversify their income so that they can adapt to micro and macro changes in the economy. Alongside taking up emerging grant opportunities, organisations will also need to plan strategically for how they may build the social and economic case for the sustained public funding it needs. The strongest case for a well-designed, ongoing support and funding package may come from organisations who have survived and thrived in the pandemic, including those who have been able to develop innovative business models - entities that could well be the smaller organisations who had 'agile resilience', and were more quickly able to adapt than larger institutions[7].

> 'It is the configuration of relationships that gives a system its essential characteristics. Thus, it is less helpful to define the creative economy by what it does, than to try to understand how it is organized… Creativity comes from being at a point of exchange.'
>
> Robert Hewison, Cultural Historian

2.4 Strategic approaches

2.4.1 STRATEGIC THINKING AND CREATIVITY

As with the vast majority of events, particularly those involving more than one performer, COVID has not only disrupted the execution of events, but also the required practice leading up to such events. That said, the pandemic has also inspired new forms of strategic thinking within the sector, in light with the need to reinvent oneself to remain relevant within these uncertain times.

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5 OECD Policy Responses to Coronavirus (COVID-19) Culture shock: COVID-19 and the cultural and creative sectors. (7 September 2020)

6 http://covi.org.uk/dev4/rethinking-financial-resilience-a-perspective-from-creative-uniteds-prosper-north/

7 Creativity, Culture and Connection. Responses from arts and culture organisations in the COVID-19 crises. Caroline Macfarland, Matilda Agace & Chris Hayes.

This has led to resetting values and priorities and innovative alternative forms of reaching out to audiences.

In terms of engagement with the public, internationally, certain arts organisations have explored creative ways to directly involve their potential audience, with such involvement to be displayed at a later date. By way of example, The Auxiliary in Middlesbrough, North Yorkshire delivered 100 disposable cameras to local residents as part of their ABODE project. The camera film was developed by a local photographer and sent back to participants as post cards. The results will also be exhibited when the gallery reopens[8].

2.4.2 STRATEGIC COLLABORATIONS WITH OTHER SECTORS

An aspect that ought to be considered relates to increased collaborations that are not necessary directly linked with other entities operating in the arts and culture industry. In this regard a number of reports (among which the OECD report mentioned earlier) notes the potential for developing strategic complementarities with both the education and the cultural sectors. "*Both sectors experienced accelerated digitalisation, which brings new opportunities for local and regional development but also risks of exacerbating inequalities without accompanying measures. Such accompanying measures include, for example, the development of methodologies and technological solutions for distance and distributed learning with digitally mediated access to cultural resources and experiences*"[9].

The lockdown and social distancing measures have also made evident the importance of arts and culture for people's psychological well-being. In this regard there are number of studies that highlight the positive psychosomatic effects of participating in cultural activity. At a local level, a study conducted in 2018 highlights that both active participation (i.e. being an artist, creating artistic work etc.) and passive participation (i.e. attending an event as an audience member, for instance) in arts and culture are associated with higher levels of life satisfaction[10], albeit a higher level of well-being for those who engage in active participation.

This recognition may provide an opportunity for further investigation into the relationship between the arts and healthcare and what role the arts may play in improving the wellbeing of persons undergoing treatment for various physical or psychological conditions. Although the benefits of art therapy across a broad range of patients is increasingly being recognised, there is scope for further research into this field at a local level.

2.5 Technology

For many years, the cultural sector remained one of the very few to be only lightly touched by the disruption that internet and mobile-driven changes were bringing to other industries and segments of society. That is no longer the case. Cultural institutions in much of the world are now busy deploying digital technologies and quickly trying to make up for lost time[11].

8 www.theauxiliary.co.uk/projects/abode
9 OECD Policy Responses to Coronavirus (COVID-19). Culture shock: COVID-19 and the cultural and creative sectors. (7 September 2020)
10 Artists, audiences and well-being: An economic analysis. Marie Briguglio · Gilmour Camilleri · Melchior Vella (add the full reference I.e. the journal in which it was published, the date etc.)
11 A New Age Of Culture: The Digitisation of Arts & Heritage Around the World. The Economist.

One of the major challenges the pandemic has brought about related to entities' flexibility and adaptability to technology and to the possibility to reach out to audiences online.

Given social-distancing protocols that prohibit physical gatherings, theatre makers have responded creatively to the COVID-19 pandemic by turning to online, digital and lo-fi or "non-embodied" modes of performance that use radio and phone.

In certain instances, the utilisation of online platforms during the pandemic has enabled entities to reach out to larger audiences (than would be physically possible)[12]. Furthermore, streaming has enabled arts and culture reach out to different clusters that were previously untapped, particularly as "*streaming does appear to attract younger, less wealthy and more ethnically diverse members of the population.*"[13] That said, it must be noted that shifting to digitalisation could have on the one hand enabled entities reach out to larger audiences though simultaneously excluded those that are not digitally savvy and those who were already more vulnerable and isolated. There were instances where the nature of the work or participants' circumstances meant that some entities were unable to shift online. Furthermore, while live events might need 'rethinking', digital performances are not sustainable as a replacement for live events whose very essence is based on the interaction that happens on the fringes of an event or out with the event itself.[14].

Another aspect where online streaming brought about changes relates to audience etiquette. While behaviour expectations of in-person performances are often exclusionary: you must be quiet, immobile and have singular focus. If you don't, you need to leave, this all changes online where an audience member can choose when, where and how to watch.

The strain caused by digitalisation on entities has been considerable, not only from a financial aspect, but also from a skill set point of view. Shifting from the stage to the screen required a shift in mindset and a need to requestion longstanding ideas of what it means to be an arts audience member. In this respect, it is worth noting that digitalisation in arts and culture goes well beyond the mere recording of an event. While such 'basic' approach has enabled entities keep in touch with audiences during the pandemic, the potential of digitalisation goes well beyond the recording of live events or live streaming of same and lies in offering an experience such as virtual and augmented realities, that is different to the live event, that is more interactive and where multimodal interfaces could be more versatile and inclusive in terms of design. This in turn can create new forms of cultural experience, dissemination and new business models with market potential.

12 Digital analytics by the company OneFurther about online viewing of One Man Two Guvnors by Richard Bean, based on the 18th-century Servant of Two Masters by Carlo Goldoni, count a staggering 2.6 million viewers over the course of one week. Such views are far beyond the seating capacity of a regular theatre building.

13 Naomi Joseph, Arts + Culture. Streaming and diversifying audiences. Theatre companies are pushing storytelling boundaries with online audiences amid COVID-19 https://theconversation.com/theatre-companies-are-pushing-storytelling-boundaries-with-online-audiences-amid-covid-19-141583 (viewed 01.08.2021)

14 Festivals Edinburgh director Julia Amour.

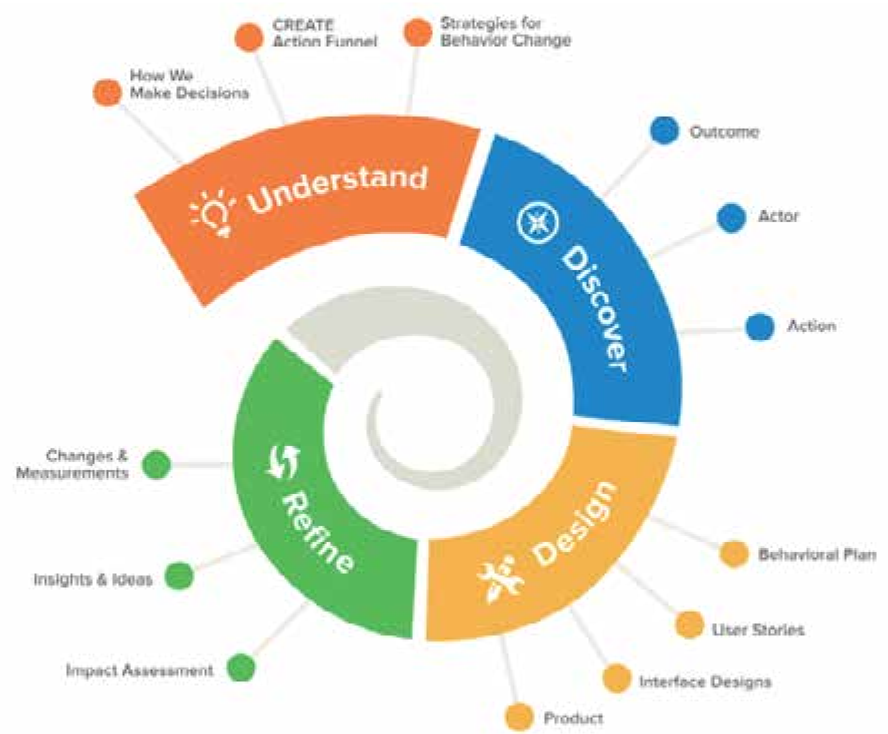
2.6 Understanding behavioural change

Changes brought about by the COVID-19 pandemic have altered the landscape of cultural activity, bringing to the fore new considerations related to attendance to public gatherings. The nature of these concerns, and the extent to which they continue to shape attitudes and behaviours of potential audiences need to be well understood in order to aptly tap into audiences, their engagement levels and spending power.

Likewise, it is crucial for PCOs to understand the behavioural changes of their audiences in order to better serve their needs and shape their programming and engagement strategies accordingly.

On the topic of behavioural chance[15] Stephen Wendel, notes how one can apply psychology and behavioural economics to product design and introduces four stages of designing for behaviour change:

FIGURE 5: FOUR STAGES OF DESIGNING FOR BEHAVIOUR CHANGE



Source: Designing for Behaviour Change: Applying Psychology and Behavioural Economics

15 Designing for Behaviour Change. Stephan Wendel.

Understand	The process starts off with gaining an understanding of how people make decisions and how our cognitive mechanisms can support (or hinder) behaviour change.
Discover	The second stage is about working out what the entity wants to accomplish with the product (or service offering), and for whom.
Design	The actual design stage can be broken down into two subtasks: i. designing the overall concept for the product/ service and ii. designing the specific user interface.
Refine	Analysing data to generate insights and ideas for ongoing improvement of the product/service.

Understanding audience perceptions is key to reaching and engaging with audiences and encouraging them to engage with your offering/s.

Moving forward in the 'new normal' there seems to be consensus (both locally and internationally) that entities success will relate to understanding how/to what extent audiences' behaviours have altered, and whether or not they are likely to persist moving forward, or whether customers are likely to revert back to 'old' habits. Furthermore, several stakeholders and customers alike note that while effective, digitalisation had failed to successfully replace the physical person to person engagement. Consequently, entities' success will also depend on how well they understand and consequently manage to develop new hybrid digital-physical models of working. Equally important, to remain sustainable, entities need to find ways to make sure that audiences can value work, whether that is through ticket donations, subscriptions, or other forms.

3. Research results

3.1 Attendance to arts & culture events in the 12 months PRIOR to COVID-19

Respondents were asked to indicate whether they attended any arts or cultural events in the 12 months prior to COVID-19. The responses of the three surveys were then aggregated. Nonetheless, it is worth noting that variances between each wave were minimal[16].

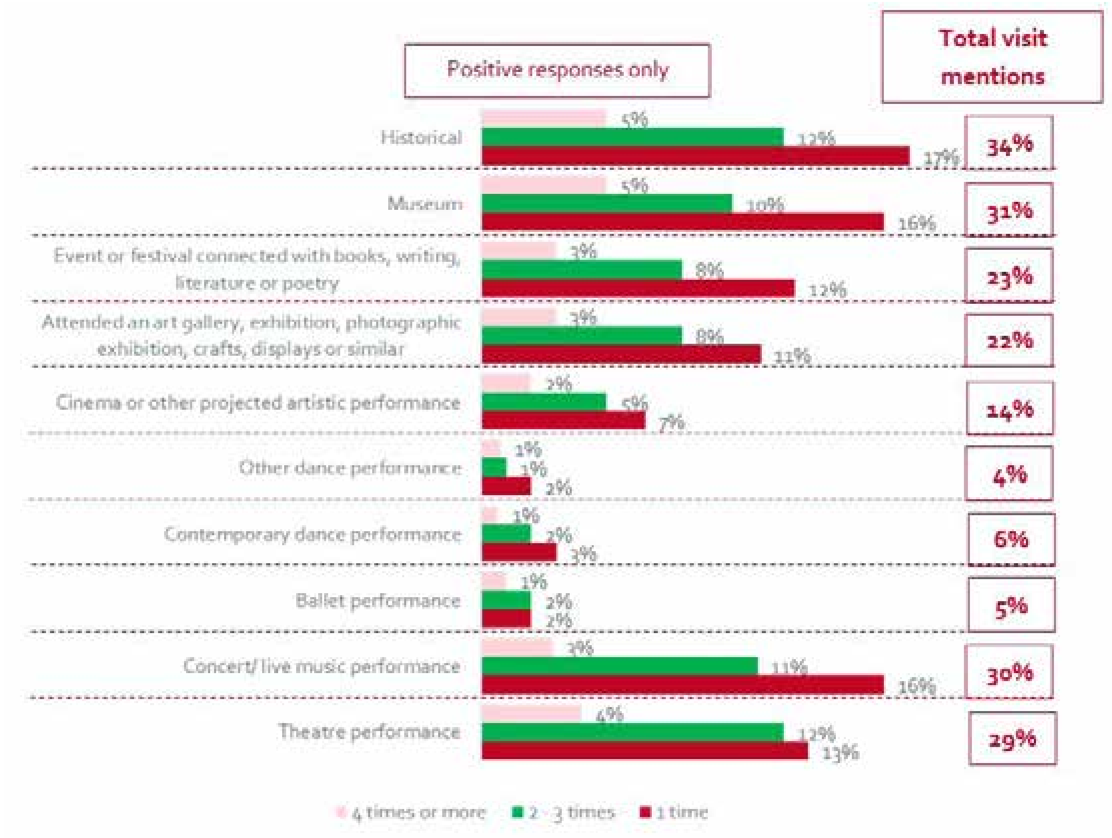
Overall, 73% of respondents noted to have attended one or more of the arts and cultural events under review. The 2016 Cultural Participation Survey, published by Arts Council Malta, found that a total of 91% had attended cultural events in the 12 months previous to the study[17].

As illustrated in the graph overleaf, visits to historical sites ranked first overall with 34% positive mentions (with 17% indicating that they have visited once, 12% two or 3 times and 5% 4 times or more). Museums then followed with 31% positive mentions, with visit frequency in line with that of historical sites. 'Concert/live music performance/s' and 'Theatre performance/s' followed with 30% and 29% mentions respectively.

Contemporary dance, ballet and other dance were the least attended with 6%, 5% and 4% responses respectively.

16 3% or less per option.
17 The 2016 survey subscribes to a wide definition of culture: from attendance to arts events, with data that can be compared to other international trends and cultural events that are unique to Maltese cultural life.

FIGURE 6: ATTENDANCE TO ARTS & CULTURE EVENTS
IN THE 12 MONTHS PRIOR TO COVID-19

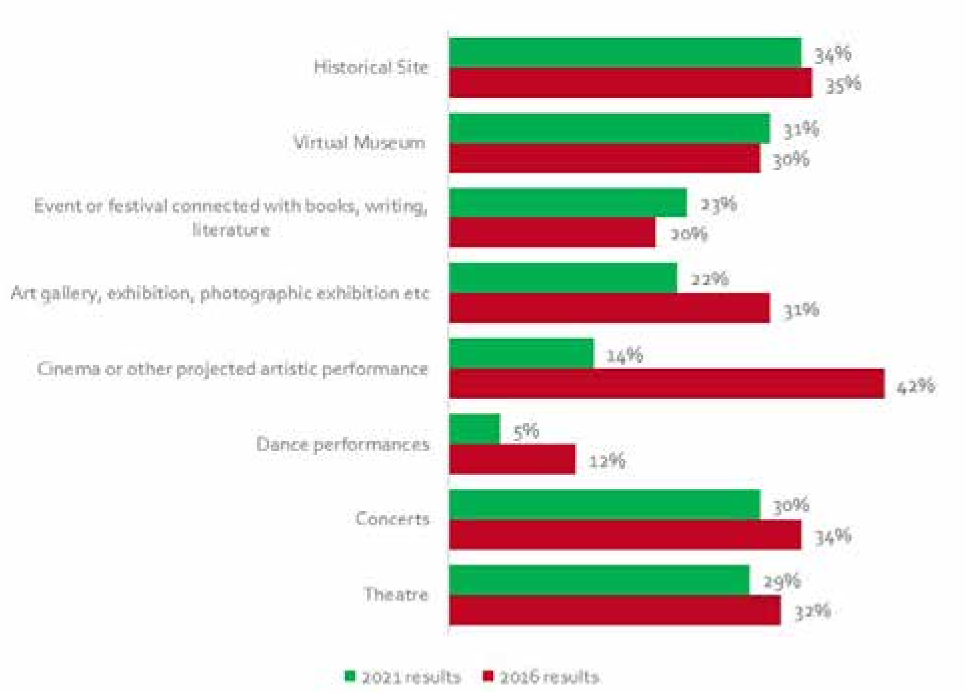


3.1.1 COMPARING PARTICIPATION WITH 2016 CULTURAL PARTICIPATION SURVEY

Analysing attendance for the distinct arts and cultural events shows that overall, there was a marginal decline in attendance in 2021 in comparison to 2016.

The highest negative variance relates to 'cinema and other projected artistic performance (a decline of 28%), followed by art gallery or similar (a decline of 9%). In relation to 'dance', the 2021 study differentiated between 'ballet', 'contemporary dance' and 'other dance'. As the 2016 study had just one generic title, 2021 figure represents an average of the distinct categories.

FIGURE 7: ARTS AND CULTURE ATTENDANCE IN 2021 COMPARED WITH 2016



3.1.2 CROSS TABULATIONS

Theatre performance (drama, musical, comedy, pantomime or similar)

- A higher percentage of females attended theatre performances compared to males. In this regard 35% of females attended, as opposed to 23% of males.
- The younger age cohort (18 - 24) attended more than other age groups. By contrast. 89% of those aged 65 and over have never attended.
- 97% of those that had only completed primary education noted to have never attended. Conversely, those that had completed tertiary education were most inclined to have attended at least once (49% indicated to have attended).

TABLE 4: THEATRE ATTENDANCE SPLIT BY GENDER

	Female	Male
1 time	14%	9%
2 - 3 times	16%	9%
4 times or more	5%	5%
Don’t Know	1%	2%
Never	64%	75%

TABLE 5: THEATRE ATTENDANCE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
1 time	18%	15%	13%	7%	15%	6%
2 - 3 times	18%	11%	14%	18%	16%	5%
4 times or more	6%	10%	11%	5%	1%	0%
Don't know	2%	1%	0%	1%	1%	0%
Never	56%	64%	62%	69%	67%	89%

TABLE 6: THEATRE ATTENDANCE SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
1 time	17%	11%	12%	11%	10%	14%
2 - 3 times	11%	20%	10%	9%	5%	15%
4 times or more	3%	7%	2%	6%	4%	7%
Don’t Know	3%	1%	1%	0%	0%	1%
Never	67%	61%	74%	74%	80%	64%

TABLE 7: THEATRE ATTENDANCE SPLIT BY HIGHEST EDUCATION LEVEL ACHIEVED

	Primary	Secondary	Post-secondary/ Non-tertiary education	Tertiary
1 time	3%	9%	8%	19%
2 - 3 times	0%	9%	16%	19%
4 times or more	0%	2%	5%	11%
Don’t Know	0%	0%	2%	0%
Never	97%	80%	69%	51%

Concert/live music performance

- Males were marginally more likely to have attended a concert/live music than females.
- 51% of those aged 18 to 24 attended a concert or live music performance, as contrasted with 85% of those aged 65 and over noted to have never attended.
- The percentage of Gozitans that never attended a concert/live music performance was marginally higher than other regions.
- The likelihood that individuals attended a concert/live music performance increased as their level of education increased.

TABLE 8: CONCERT/LIVE MUSIC ATTENDANCE SPLIT BY GENDER

	Female	Male
1 time	18%	16%
2 - 3 times	16%	11%
4 times or more	4%	4%
Don't Know	1%	0%
Never	61%	69%

TABLE 9: CONCERT/LIVE MUSIC ATTENDANCE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
1 time	23%	17%	20%	23%	18%	6%
2 - 3 times	23%	13%	17%	18%	9%	9%
4 times or more	5%	7%	5%	1%	4%	0%
Don't Know	0%	2%	0%	0%	1%	0%
Never	49%	61%	58%	58%	68%	85%

TABLE 10: CONCERT/LIVE MUSIC ATTENDANCE SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
1 time	8%	15%	23%	22%	14%	15%
2 - 3 times	14%	20%	9%	8%	15%	14%
4 times or more	3%	4%	4%	4%	3%	4%
Don't Know	3%	0%	0%	1%	0%	1%
Never	72%	61%	63%	65%	67%	66%

TABLE 11: CONCERT/LIVE MUSIC ATTENDANCE SPLIT BY HIGHEST LEVEL OF EDUCATION ACHIEVED

	Primary	Secondary	Post-secondary/ Non-tertiary education	Tertiary
1 time	11%	11%	24%	21%
2 - 3 times	0%	10%	12%	25%
4 times or more	0%	2%	4%	7%
Don't Know	0%	1%	0%	0%
Never	89%	76%	61%	47%

Ballet performance

- 95% of males and 85% of females never attended a ballet performance.
- Those aged 18 to 24, followed by those aged 35 to 44 were more likely to have attended a ballet performance at least twice. Conversely, only 3% of those aged 65 and over attended such a performance.
- Those residing in the South Eastern region and Southern Harbour region were least likely to have attended a ballet performance
- 22% of those that had completed tertiary education attended at least once.

TABLE 12: BALLET ATTENDANCE SPLIT BY GENDER

	Female	Male
1 time	7%	3%
2 - 3 times	6%	2%
4 times or more	2%	0%
Don't Know	0%	0%
Never	85%	95%

TABLE 13: BALLET ATTENDANCE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
1 time	5%	5%	8%	9%	2%	1%
2 - 3 times	11%	5%	4%	4%	1%	1%
4 times or more	0%	0%	5%	0%	1%	1%
Don't Know	0%	1%	0%	0%	0%	0%
Never	84%	89%	83%	87%	96%	97%

TABLE 14: BALLET ATTENDANCE SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
1 time	3%	7%	6%	2%	2%	8%
2 - 3 times	6%	5%	4%	4%	1%	4%
4 times or more	3%	1%	1%	0%	0%	4%
Don't Know	3%	1%	0%	0%	0%	0%
Never	86%	86%	89%	94%	97%	84%

TABLE 15: BALLET ATTENDANCE SPLIT BY HIGHEST LEVEL OF EDUCATION ACHIEVED

	Primary	Secondary	Post-secondary/ Non-tertiary education	Tertiary
1 time	0%	3%	2%	11%
2 - 3 times	0%	1%	3%	9%
4 times or more	0%	0%	3%	2%
Don't Know	0%	0%	0%	1%
Never	100%	96%	92%	77%

Contemporary dance performance

- Females were more likely to have attended at least once with 16% indicating to have done so as opposed to 6% of males.
- The likelihood of attendance decreased with age.
- People residing in the Northern Harbour region were most likely to have attended a contemporary dance performance.
- The likelihood of attendance to such a performance increased with level of education.

TABLE 16: CONTEMPORARY DANCE ATTENDANCE SPLIT BY GENDER

	Female	Male
1 time	8%	4%
2 - 3 times	6%	2%
4 times or more	1%	0%
Don't Know	0%	1%
Never	84%	93%

TABLE 17: CONTEMPORARY DANCE ATTENDANCE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
1 time	13%	6%	6%	5%	8%	1%
2 - 3 times	16%	4%	3%	4%	0%	1%
4 times or more	2%	2%	2%	0%	0%	1%
Don't Know	0%	1%	0%	0%	0%	0%
Never	69%	87%	89%	91%	92%	97%

TABLE 18: CONTEMPORARY DANCE ATTENDANCE SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
1 time	6%	8%	6%	7%	4%	4%
2 - 3 times	3%	7%	3%	1%	1%	7%
4 times or more	3%	2%	0%	0%	0%	1%
Don't Know	0%	1%	1%	0%	0%	0%
Never	88%	82%	90%	92%	95%	88%

TABLE 19: CONTEMPORARY DANCE ATTENDANCE SPLIT BY HIGHEST LEVEL OF EDUCATION ACHIEVED

	Primary	Secondary	Post-secondary/ Non-tertiary education	Tertiary
1 time	0%	4%	6%	11%
2 - 3 times	0%	1%	5%	7%
4 times or more	0%	1%	1%	1%
Don't Know	0%	0%	0%	1%
Never	100%	94%	88%	80%

Other dance performance

- Once again, females were more likely to have attended such a performance.
- 21% of those aged 18 to 24 noted to have done so at least once.
- Gozitans and those residing in the Western regions were the most likely to have attended at least once.
- The likelihood of attendance to such a performance increased with their level of education.

TABLE 20: OTHER DANCE PERFORMANCE ATTENDANCE SPLIT BY GENDER

	Female	Male
1 time	8%	2%
2 - 3 times	4%	3%
4 times or more	1%	0%
Don't Know	1%	0%
Never	86%	95%

TABLE 21: OTHER DANCE PERFORMANCE ATTENDANCE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
1 time	11%	4%	3%	9%	6%	2%
2 - 3 times	10%	4%	4%	4%	1%	1%
4 times or more	0%	1%	2%	0%	0%	0%
Don't Know	0%	1%	1%	0%	0%	1%
Never	79%	90%	90%	87%	93%	96%

TABLE 22: OTHER DANCE PERFORMANCE ATTENDANCE SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
1 time	6%	5%	8%	2%	2%	9%
2 - 3 times	6%	5%	2%	2%	1%	5%
4 times or more	3%	1%	0%	0%	0%	1%
Don't Know	3%	1%	0%	0%	0%	0%
Never	83%	87%	90%	95%	97%	84%

TABLE 23: OTHER DANCE PERFORMANCE ATTENDANCE SPLIT BY HIGHEST LEVEL OF EDUCATION ACHIEVED

	Primary	Secondary	Post-secondary/ Non-tertiary education	Tertiary
1 time	0%	2%	6%	7%
2 - 3 times	0%	1%	3%	9%
4 times or more	0%	1%	1%	0%
Don't Know	0%	0%	1%	1%
Never	100%	96%	89%	83%

Cinema or other projected artistic performance

- No noticeable variance was observed when analysing data by gender.
- Those aged 45 to 64 have attended more than other age groups.
- 22% of those that had completed tertiary education have attended at least once as opposed to 6% of those that had completed primary education only.

TABLE 24: CINEMA ATTENDANCE SPLIT BY GENDER

	Female	Male
1 time	6%	6%
2 - 3 times	6%	5%
4 times or more	2%	1%
Don't Know	0%	0%
Never	86%	88%

TABLE 25: CINEMA ATTENDANCE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
1 time	3%	4%	6%	9%	10%	4%
2 - 3 times	5%	7%	5%	9%	7%	3%
4 times or more	2%	1%	1%	4%	2%	0%
Don't Know	0%	2%	0%	0%	0%	0%
Never	90%	86%	88%	78%	81%	93%

TABLE 26: CINEMA ATTENDANCE SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
1 time	6%	9%	3%	2%	9%	4%
2 - 3 times	6%	7%	6%	5%	5%	7%
4 times or more	0%	3%	1%	0%	1%	3%
Don't Know	3%	0%	0%	0%	0%	1%
Never	85%	81%	90%	93%	85%	85%

TABLE 27: CINEMA ATTENDANCE SPLIT BY HIGHEST LEVEL OF EDUCATION ACHIEVED

	Primary	Secondary	Post-secondary/ Non-tertiary education	Tertiary
1 time	3%	7%	2%	9%
2 - 3 times	3%	3%	7%	10%
4 times or more	0%	0%	3%	3%
Don't Know	0%	0%	0%	0%
Never	94%	90%	88%	78%

Art gallery, exhibition, photographic exhibition, crafts, displays or similar

- No noticeable variance was observed when analysing data by gender.
- 33% of those aged 35 to 44 attended at least once, this being the highest percentage among the various age cohorts.
- Gozitans had the highest percentage that indicated to have attended 4 times or more (8%)
- The percentage of attendance increased in line with respondents' highest level of education, with 42% of those that completed tertiary education having visited at least one time.

TABLE 28: ART GALLERY ATTENDANCE SPLIT BY GENDER

	Female	Male
1 time	11%	11%
2 - 3 times	9%	10%
4 times or more	2%	5%
Don't Know	1%	0%
Never	77%	74%

TABLE 29: ART GALLERY ATTENDANCE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
1 time	13%	11%	15%	12%	11%	6%
2 - 3 times	5%	11%	12%	12%	12%	6%
4 times or more	2%	2%	6%	3%	4%	4%
Don't Know	0%	2%	0%	1%	0%	0%
Never	80%	74%	67%	72%	73%	84%

TABLE 30: ART GALLERY ATTENDANCE SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
1 time	6%	13%	13%	11%	9%	11%
2 - 3 times	11%	8%	12%	7%	11%	11%
4 times or more	8%	5%	1%	2%	2%	5%
Don't Know	3%	1%	1%	0%	0%	0%
Never	72%	73%	73%	80%	78%	73%

TABLE 31: ART GALLERY ATTENDANCE SPLIT BY HIGHEST LEVEL OF EDUCATION

	Primary	Secondary	Post-secondary/ Non-tertiary education	Tertiary
1 time	6%	9%	8%	17%
2 - 3 times	6%	6%	8%	17%
4 times or more	0%	1%	4%	8%
Don't Know	0%	0%	1%	0%
Never	88%	84%	79%	58%

Event or festival connected with books, writing, literature or poetry

- No significant variance was observed when analysing data by gender.
- A review of responses by age indicates that the highest percentage of individuals that attended were aged 35 to 44 followed by those aged 25 to 34.
- Gozitans and those residing in the South Eastern region attained the lowest attendance rate.
- The percentage of attendance increased as individuals' highest level of education increased with 46% of those that completed tertiary education having attended at least one time.

TABLE 32: ATTENDED AN EVENT OR FESTIVAL CONNECTED WITH BOOKS SPLIT BY GENDER

	Female	Male
1 time	11%	11%
2 - 3 times	9%	10%
4 times or more	2%	5%
Don't Know	1%	0%
Never	77%	74%

TABLE 33: ATTENDED AN EVENT OR FESTIVAL CONNECTED WITH BOOKS SPLIT BY GENDER

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
1 time	11%	17%	16%	12%	13%	8%
2 - 3 times	11%	13%	18%	12%	13%	7%
4 times or more	2%	6%	7%	4%	4%	3%
Don't Know	0%	1%	0%	1%	0%	0%
Never	76%	63%	59%	71%	70%	82%

TABLE 34: ATTENDED AN EVENT OR FESTIVAL CONNECTED WITH BOOKS SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
1 time	6%	18%	12%	19%	9%	7%
2 - 3 times	6%	11%	16%	4%	18%	18%
4 times or more	8%	5%	6%	0%	4%	5%
Don't Know	3%	0%	1%	0%	0%	0%
Never	78%	66%	66%	78%	68%	70%

TABLE 35: ATTENDED AN EVENT OR FESTIVAL CONNECTED WITH BOOKS SPLIT BY HIGHEST LEVEL OF EDUCATION

	Primary	Secondary	Post-secondary/ Non-tertiary education	Tertiary
1 time	6%	9%	15%	19%
2 - 3 times	6%	9%	13%	19%
4 times or more	0%	2%	6%	8%
Don't Know	0%	0%	1%	0%
Never	88%	80%	65%	54%

Museum

- No significant variance was observed when analysing data by gender.
- A review of responses by age indicates that the highest percentage of individuals that attended a museum were aged 35 to 44 followed by those aged 45 to 54. A total of 74% of those aged 18 to 24 did not visit, this being the highest percentage among the different age cohorts, followed closely behind by those aged 65 and over (73%).
- A review of responses by regions shows that the highest percentage of attendance was among those residing in the Northern region (37%).
- With 44% responses, a review by educational level completed indicates that the highest percentage of attendance was among those that has completed tertiary education.

TABLE 36: MUSEUM ATTENDANCE SPLIT BY GENDER

	Female	Male
1 time	14%	15%
2 - 3 times	13%	10%
4 times or more	4%	7%
Don't Know	1%	1%
Never	68%	67%

TABLE 37: MUSEUM ATTENDANCE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
1 time	11%	7%	19%	16%	17%	14%
2 - 3 times	10%	18%	12%	11%	10%	8%
4 times or more	5%	5%	9%	7%	2%	5%
Don't Know	0%	3%	0%	3%	0%	0%
Never	74%	67%	60%	63%	71%	73%

TABLE 38: MUSEUM ATTENDANCE SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
1 time	6%	18%	20%	16%	9%	8%
2 - 3 times	6%	9%	13%	9%	21%	8%
4 times or more	8%	6%	4%	5%	4%	8%
Don't Know	3%	0%	2%	1%	0%	1%
Never	77%	67%	61%	69%	66%	75%

TABLE 39: MUSEUM ATTENDANCE SPLIT BY HIGHEST LEVEL OF EDUCATION ACHIEVED

	Primary	Secondary	Post-secondary/ Non-tertiary education	Tertiary
1 time	14%	13%	13%	17%
2 - 3 times	9%	7%	11%	18%
4 times or more	6%	2%	7%	10%
Don't Know	0%	1%	0%	1%
Never	71%	77%	69%	54%

Historical site

- While those that visited once were equally among genders (15% each), a marginally higher percentage of females visited twice or three times (16% of females as opposed to 10% of males).
- 43% of those aged 35 to 44 visited at least once, this being the highest percentage among the different age cohorts. Conversely 73% of those aged 65 and over have never attended.
- The Northern region and the Northern Harbour region attained the highest responses for attending at least once (30% each).
- 45% of those that had completed tertiary education did not visit.

TABLE 40: HISTORICAL SITE ATTENDANCE SPLIT BY GENDER

	Female	Male
1 time	15%	15%
2 - 3 times	16%	10%
4 times or more	6%	7%
Don't Know	1%	2%
Never	62%	66%

TABLE 41: HISTORICAL SITE ATTENDANCE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
1 time	18%	7%	18%	16%	17%	15%
2 - 3 times	11%	21%	16%	11%	11%	7%
4 times or more	6%	6%	9%	9%	2%	5%
Don't Know	0%	4%	2%	3%	0%	0%
Never	65%	62%	55%	61%	70%	73%

TABLE 42: HISTORICAL SITE ATTENDANCE SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
1 time	8%	20%	18%	14%	10%	12%
2 - 3 times	8%	14%	16%	8%	18%	9%
4 times or more	14%	7%	7%	5%	4%	7%
Don't Know	3%	1%	2%	2%	1%	1%
Never	67%	59%	58%	71%	66%	70%

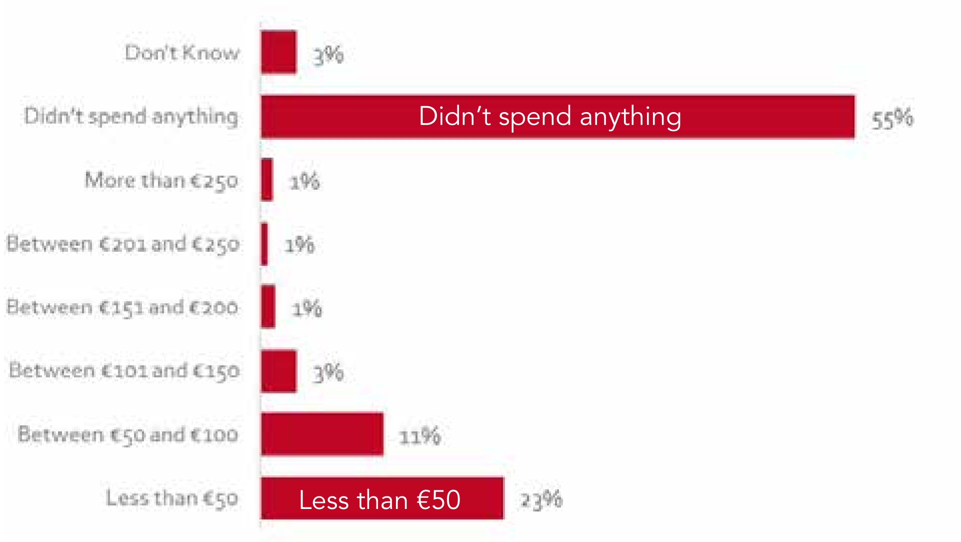
TABLE 43: HISTORICAL SITE ATTENDANCE SPLIT BY HIGHEST LEVEL OF EDUCATION ACHIEVED

	Primary	Secondary	Post-secondary/ Non-tertiary education	Tertiary
1 time	9%	12%	16%	20%
2 - 3 times	9%	9%	12%	21%
4 times or more	6%	3%	8%	11%
Don't Know	0%	1%	0%	3%
Never	76%	75%	64%	45%

3.2 Average yearly spend prior to COVID-19

The findings indicate that prior to COVID-19, the majority of the population (55%) tended not to spend on arts and culture. The majority of those that spent indicated to have spent less than €50.

FIGURE 8: ON AVERAGE, IN THE 12 MONTHS PRIOR TO COVID-19 (PRIOR TO MARCH 2020), HOW MUCH DID YOU SPEND ON ARTS AND CULTURE (YEARLY SPEND):



A cross analysis of responses by demographics illustrates that:

- A marginally higher percentage of females spent money on arts and culture on the whole.
- The youngest age cohort (18 to 24) were the most likely to have spent money on arts and culture (62%) while the eldest age cohort (65 and over) were least likely (with 76% indicating not having spent anything)
- 57% of those residing in the Northern region spent money on arts and culture, this being the highest percentage among the various age regions.
- 83% of those that had completed primary education did not spend money on cultural events. By contrast, 73% of those that had completed tertiary education indicated that they had spent money on arts and culture.

TABLE 44: AVERAGE YEARLY SPEND SPLIT BY GENDER

	Primary	Secondary	Post-secondary/ Non-tertiary education	Tertiary
Didn't spend anything	83%	63%	39%	23%
Less than €50	17%	23%	28%	27%
Between €50 and €100	0%	8%	13%	29%
Between €101 and €150	0%	0%	6%	8%
Between €151 and €200	0%	1%	2%	4%
Between €201 and €250	0%	0%	2%	2%
More than €250	0%	0%	2%	3%
Don't know	0%	5%	8%	4%

TABLE 45: AVERAGE YEARLY SPEND SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Didn't spend anything	32%	38%	39%	38%	46%	76%
Less than €50	31%	21%	27%	23%	30%	18%
Between €50 and €100	13%	24%	18%	23%	11%	4%
Between €101 and €150	11%	5%	4%	3%	3%	0%
Between €151 and €200	3%	1%	5%	3%	2%	0%
Between €201 and €250	2%	1%	0%	1%	2%	0%
More than €250	2%	2%	3%	1%	0%	0%
Don't know	6%	6%	3%	8%	4%	3%

TABLE 46: AVERAGE YEARLY SPEND SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
Didn't spend anything	50%	41%	39%	56%	50%	51%
Less than €50	31%	23%	29%	18%	32%	19%
Between €50 and €100	8%	15%	23%	13%	10%	18%
Between €101 and €150	0%	7%	2%	4%	2%	4%
Between €151 and €200	6%	4%	1%	2%	1%	0%
Between €201 and €250	0%	3%	0%	0%	0%	1%
More than €250	3%	1%	2%	0%	0%	3%
Don't know	2%	6%	4%	7%	5%	4%

TABLE 47: AVERAGE YEARLY SPEND SPLIT BY HIGHEST LEVEL OF EDUCATION ACHIEVED

	Primary	Secondary	Post-secondary/ Non-tertiary education	Tertiary
Didn't spend anything	83%	63%	39%	23%
Less than €50	17%	23%	28%	27%
Between €50 and €100	0%	8%	13%	29%
Between €101 and €150	0%	0%	6%	8%
Between €151 and €200	0%	1%	2%	4%
Between €201 and €250	0%	0%	2%	2%
More than €250	0%	0%	2%	3%
Don't know	0%	5%	8%	4%

3.3 Online following

3.3.1 DURING THE PARTIAL LOCKDOWN (COVID-19 PERIOD MARCH 2020 TO MAY 2020)

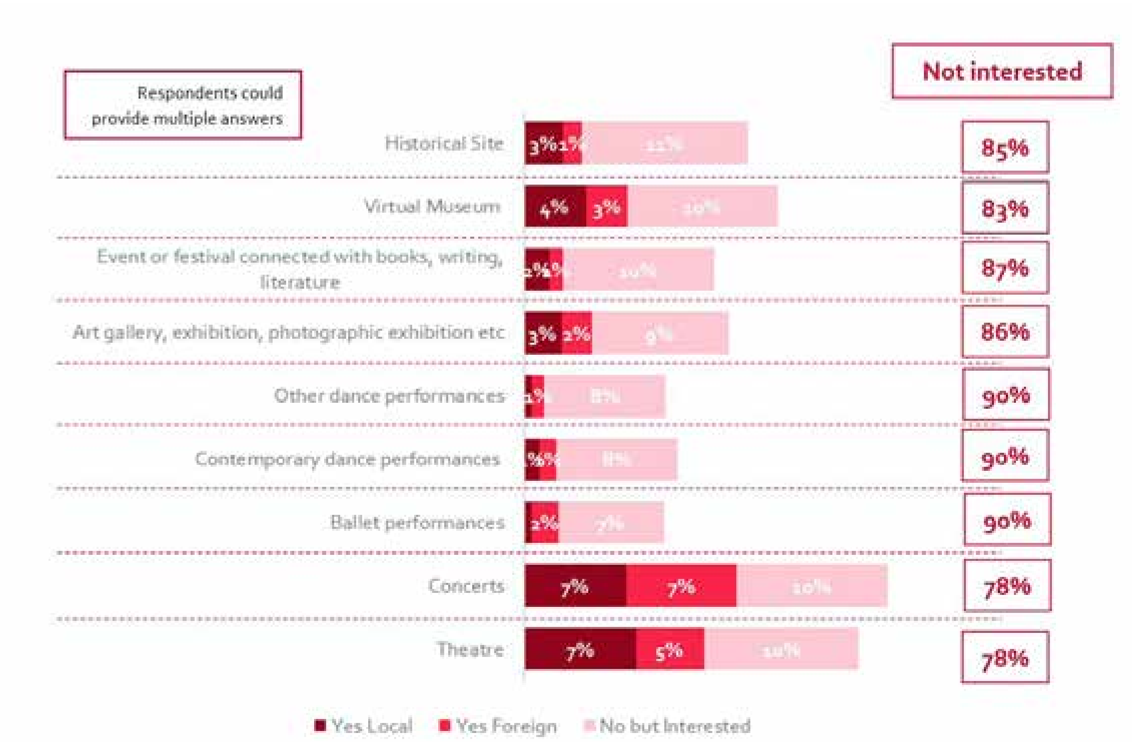
The survey then sought to determine locals' propensity to follow arts and culture online during the partial lockdown.

Of the various arts and culture disciplines under review, concerts and theatre were the most followed with 7% mentions each. Furthermore, in both instances, 22% noted to have either viewed or intended to view such performances online in the future. Conversely, dance performances and ballet have the least following with 10% noting to have either viewed online or intended to do so in the future.

While a relatively low percentage overall viewed an online historical site or virtual museum (4% and 7% respectively) a further, 11% and 10% respectively did not rule out the possibility of doing so in the future.

The research further illustrates that overall, in respondents' mind there is no significant variance when it comes to deciding whether to view a local online event or a foreign one. No significant variance was observed here in terms of preference. A review of responses for the different categories under review shows that the highest percentage of viewing was for concerts. Here, an equal percentage of respondents followed local concerts as they did to foreign concerts (7% each).

FIGURE 9: ONLINE FOLLOWING DURING THE PARTIAL LOCKDOWN
(COVID-19 PERIOD MARCH 2020 TO MAY 2020)



In view of the minimal positive responses, the only reliable cross analysis for the distinct events was by gender. It must be noted that, in most instances, the percentages across the distinct classifications are low (below 5%) thus implying that variances are not statistically significant.

Theatre performance

No significant variances were observed when analysing data for locals' online following of theatre performances, with local websites attaining a marginally higher response than foreign websites with both genders.

TABLE 48: THEATRE ONLINE FOLLOWING SPLIT BY GENDER

	Yes - Local Website	Yes - Foreign Website	No but interested
Female	11%	7%	13%
Male	9%	4%	11%

Concerts/live music performance

No noticeable variances were observed when comparing local website viewing with foreign. Furthermore, a similar percentage indicated that they had not viewed any concerts/musical performances online though they were interested in doing so in the future.

TABLE 49: CONCERTS/LIVE MUSIC ONLINE FOLLOWING SPLIT BY GENDER

	Yes - Local Website	Yes - Foreign Website	No but interested
Female	12%	11%	13%
Male	8%	9%	9%

Ballet Performance

A marginally higher percentage of females indicated that they had viewed a ballet performance online than did males. Furthermore, foreign websites were viewed marginally more than local ones (for both genders). Among those that had not viewed any online performance, a marginally higher percentage of females indicated an interest in doing so in the future than did males (16% of females as opposed to 10% of males).

TABLE 50: BALLET ONLINE FOLLOWING SPLIT BY GENDER

	Yes - Local Website	Yes - Foreign Website	No but interested
Female	2%	4%	16%
Male	0%	2%	10%

Contemporary dance performance

Online viewing of contemporary dance performance by male respondents was negligible. Among females, an equal percentage viewed a local website as a foreign one. Furthermore, among those that had not viewed any online performance, a marginally higher percentage of females indicated an interest in doing so in the future than males (15% of females as opposed to 10% of males).

TABLE 51: ONLINE FOLLOWING OF CONTEMPORARY DANCE PERFORMANCE SPLIT BY GENDER

	Yes - Local Website	Yes - Foreign Website	No but interested
Female	3%	3%	15%
Male	0%	1%	10%

Other dance performance

A similar trend as that for contemporary dance was observed, albeit a lower percentage of females followed this category.

TABLE 52: ONLINE FOLLOWING OF OTHER DANCE PERFORMANCE SPLIT BY GENDER

	Yes - Local Website	Yes - Foreign Website	No but interested
Female	1%	2%	17%
Male	0%	1%	11%

Art gallery, exhibition, photographic exhibition, crafts displays or similar

An equal percentage of females followed a local website as did those that followed a foreign one (3% in each case), though a marginally higher percentage of males followed a local website than they did a foreign one. That said, a higher percentage of females noted that though they had not viewed online they would be interested in doing so in the future (16% females as opposed to 10% of males).

TABLE 53: ONLINE ART GALLERY VIEWERSHIP OR SIMILAR SPLIT BY GENDER

	Yes - Local Website	Yes - Foreign Website	No but interested
Female	3%	3%	16%
Male	4%	1%	10%

Event or festival connected with books, writing, literature or poetry

Females tended to participate exclusively on local platforms, while there was no variance among male online viewers. 18% of females noted that though they had not viewed a book-related event online, they would be interested in doing so in the future. Among males, the percentage stood at 10%.

TABLE 54: ONLINE FOLLOWING OF BOOKS RELATED EVENT SPLIT BY GENDER

	Yes - Local Website	Yes - Foreign Website	No but interested
Female	3%	0%	18%
Male	2%	2%	10%

Museum

An equal percentage of females viewed a local virtual museum as a foreign one (4% in each case), while males were more inclined to have visited a local website (6% viewed a local as opposed to 2% that viewed a foreign one). Females that had not viewed were marginally more inclined to be interested in viewing in the future than their male counterparts (16% of females as opposed to 11% of males).

TABLE 55: ONLINE VIRTUAL MUSEUM FOLLOWING SPLIT BY GENDER

	Yes - Local Website	Yes - Foreign Website	No but interested
Female	4%	4%	16%
Male	6%	2%	11%

Historical site online

A higher percentage of females that had not viewed a historical site online indicated that they would be interested in doing so in the future than males (17% of females as opposed to 11% of males).

TABLE 56: ONLINE FOLLOWING OF HISTORICAL SITE/S SPLIT BY GENDER

	Yes - Local Website	Yes - Foreign Website	No but interested
Female	4%	2%	17%
Male	2%	2%	11%

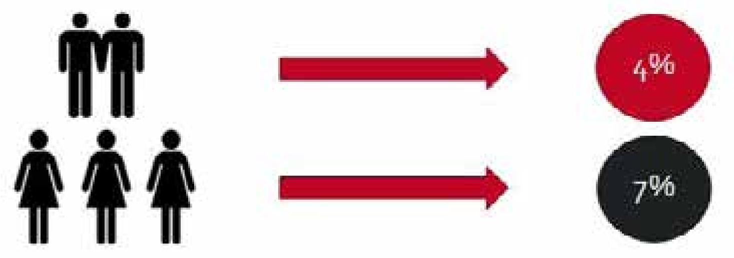
3.3.2 PROPENSITY TO PAY

While 32% of respondents noted following one or more online events related to arts and culture during the partial lockdown, the vast majority noted that such viewings were free of charge, irrespective of whether they were viewing a local or foreign arts and culture online event.

TABLE 57: ONLINE SPEND ON ARTS AND CULTURE DURING THE PARTIAL LOCKDOWN

A cross analysis of responses shows that females were marginally more inclined to spend on an online event than their male counterparts.

TABLE 58: SPEND ON ONLINE ARTS AND CULTURE EVENT DURING PARTIAL LOCKDOWN SPLIT BY GENDER



In terms of age, the 35 to 44 age cohort, followed closely behind by the 18 to 24 and 45 to 54 were the ones most likely to have spent money (10% on average indicated to have spent on online arts and culture event during partial lockdown). Conversely, those aged 55 and over were the least likely to have spent money on these activities.

TABLE 59: SPEND ON ONLINE ARTS AND CULTURE EVENT DURING PARTIAL LOCKDOWN SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Spend	10%	4%	11%	9%	1%	2%
Don’t know	9%	3%	6%	5%	1%	3%
Didn't spend anything	81%	93%	83%	86%	98%	95%

Residents of the South Eastern region were the ones that least spent on online arts and culture during the lockdown with a mere 1% noting to have done so (while 8% indicated not to recall).

TABLE 60: SPEND ON ONLINE ARTS AND CULTURE EVENT DURING PARTIAL LOCKDOWN SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
Spend	6%	8%	8%	1%	4%	5%
Don’t know	0%	4%	1%	8%	5%	6%
Didn't spend anything	94%	88%	91%	91%	91%	89%

In terms of education level, the higher the education level attained, the more likely it was for them to have spent money on arts and culture during the lockdown. None of the respondents that had only completed primary schooling spent money on such events, as opposed to 10% of those that had completed tertiary education.

TABLE 61: SPEND ON ONLINE ARTS AND CULTURE EVENT DURING PARTIAL LOCKDOWN SPLIT BY HIGHEST LEVEL OF EDUCATION ATTAINED

	Primary	Secondary	Post-secondary	Tertiary
Spend	0%	2%	4%	10%
Don’t know	3%	4%	7%	3%
Didn't spend anything	97%	94%	89%	87%

3.3.3 MOVING FORWARD - WITH/WITHOUT COVID 19

In line with the above, when thinking about the future, the research indicates that overall individuals are not inclined to increase their likely participation in arts and cultural activities online when compared with the previous 12 months (prior to COVID-19). The longitudinal survey has evidenced that over time individuals felt less and less inclined to do so (with the number of individuals indicating that their online participation was likely to decrease increasing with each survey). The 3rd and final survey notes that a total of 83% believed that their participation to arts and cultural activities online would decrease in the year/s to come. Conversely, 8% felt that it would increase.

FIGURE 10: MOVING FORWARD (IN THE YEAR/S TO COME - WITH OR WITHOUT COVID), YOUR PARTICIPATION TO ARTS AND CULTURAL ACTIVITIES ONLINE WHEN COMPARED WITH THE PREVIOUS 12 MONTHS (PRIOR TO COVID-19) IS LIKELY TO:

Wave 3 cross tabulations

No statistical variances were observed when analysing data by gender.

TABLE 62: LIKELY PARTICIPATION TO ARTS AND CULTURAL ACTIVITIES ONLINE (IN THE YEAR/S TO COME - WITH OR WITHOUT COVID), WHEN COMPARED WITH THE PREVIOUS 12 MONTHS (PRIOR TO COVID-19) SPLIT BY GENDER

	Female	Male
Increase	8%	8%
Remain the same	10%	8%
Decrease	82%	84%

Those aged 35 to 54 were the age cohorts that indicated the highest likely increase in their participation to arts and cultural activities ONLINE when compared with the previous 12 months.

TABLE 63: LIKELY PARTICIPATION TO ARTS AND CULTURAL ACTIVITIES ONLINE (IN THE YEAR/S TO COME - WITH OR WITHOUT COVID), WHEN COMPARED WITH THE PREVIOUS 12 MONTHS (PRIOR TO COVID-19) SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Increase	6%	3%	11%	12%	7%	7%
Remain the same	8%	14%	5%	12%	8%	7%
Decrease	85%	83%	84%	76%	85%	86%

A review of responses by region indicates that Gozitans are the ones to be more likely to increase their future online participation in arts and cultural activities with 21% indicating this to be the case.

TABLE 64: LIKELY PARTICIPATION TO ARTS AND CULTURAL ACTIVITIES ONLINE (IN THE YEAR/S TO COME - WITH OR WITHOUT COVID), WHEN COMPARED WITH THE PREVIOUS 12 MONTHS (PRIOR TO COVID-19) SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Increase	21%	7%	6%	2%	10%	8%
Remain the same	5%	15%	6%	4%	4%	15%
Decrease	74%	78%	88%	94%	86%	77%

When analysing data by educational level, 91% of those that had completed only primary education indicated that their online participation would decrease in the future, as opposed to 81% of those that had completed tertiary education.

TABLE 65: LIKELY PARTICIPATION TO ARTS AND CULTURAL ACTIVITIES ONLINE (IN THE YEAR/S TO COME - WITH OR WITHOUT COVID), WHEN COMPARED WITH THE PREVIOUS 12 MONTHS (PRIOR TO COVID-19) SPLIT BY HIGHEST LEVEL OF EDUCATION ATTAINED

	Primary	Secondary	Post-secondary	Tertiary
Increase	6%	5%	8%	10%
Remain the same	3%	10%	7%	9%
Decrease	91%	85%	86%	81%

Willingness to pay

Among respondents who indicated a willingness to participate in online events in the future, around half stated that they would be willing to pay for such events.

A look at the distinct arts and cultural activities under review in Wave 3 shows minimal variances between those willing to pay and those that are only interested in participating for free.

FIGURE 11: INCLINED TO PARTICIPATE ONLINE AND PAY FOR SUCH AN EVENT - SPLIT BY ACTIVITY

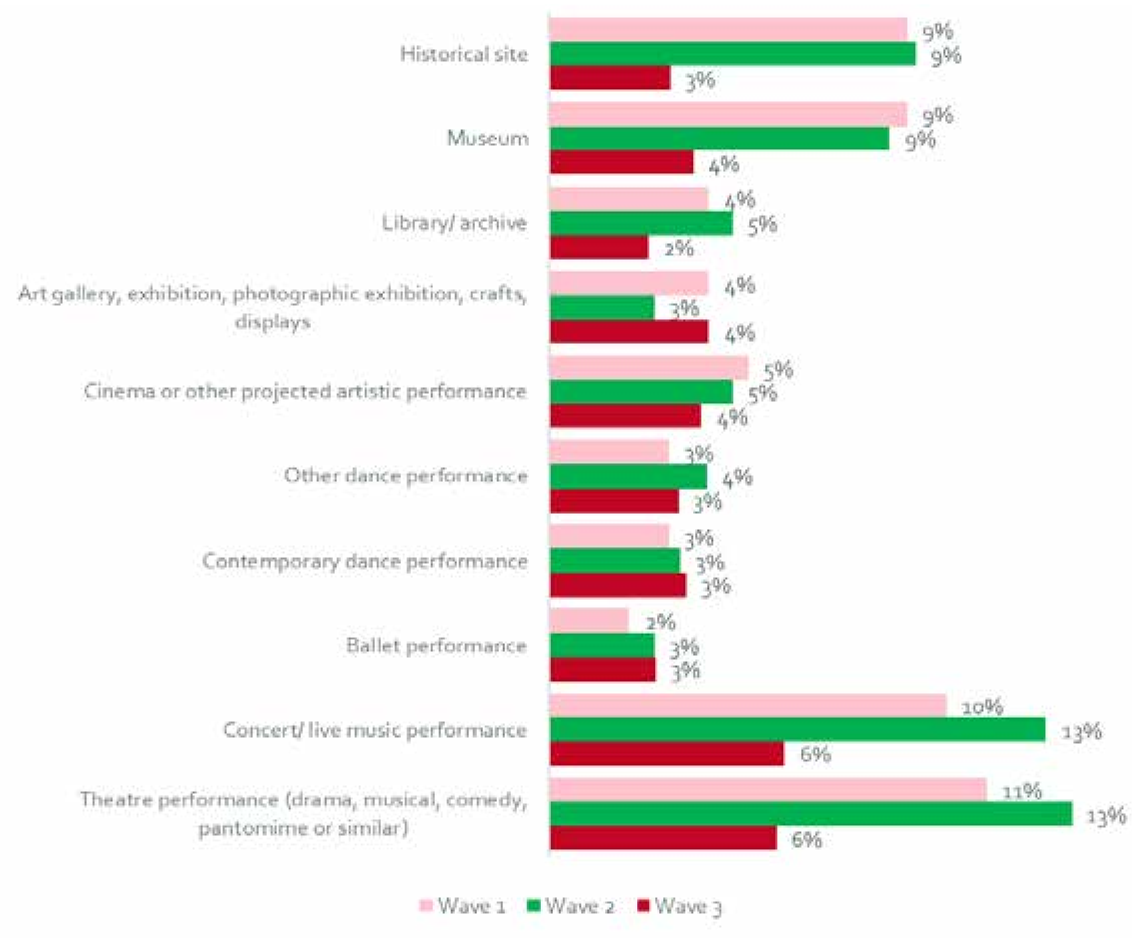
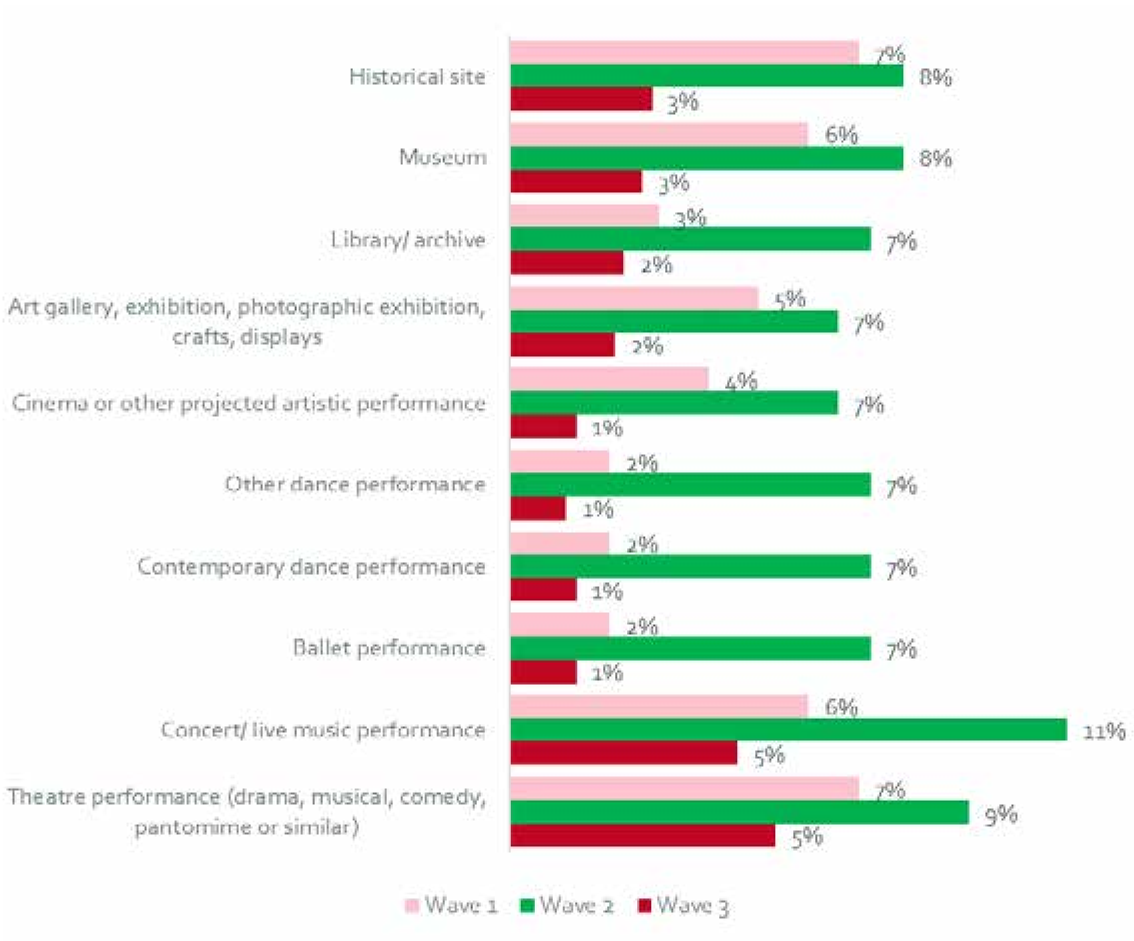


FIGURE 12: INCLINED TO PARTICIPATE ONLINE FOR FREE FOR SUCH AN EVENT - SPLIT BY ACTIVITY

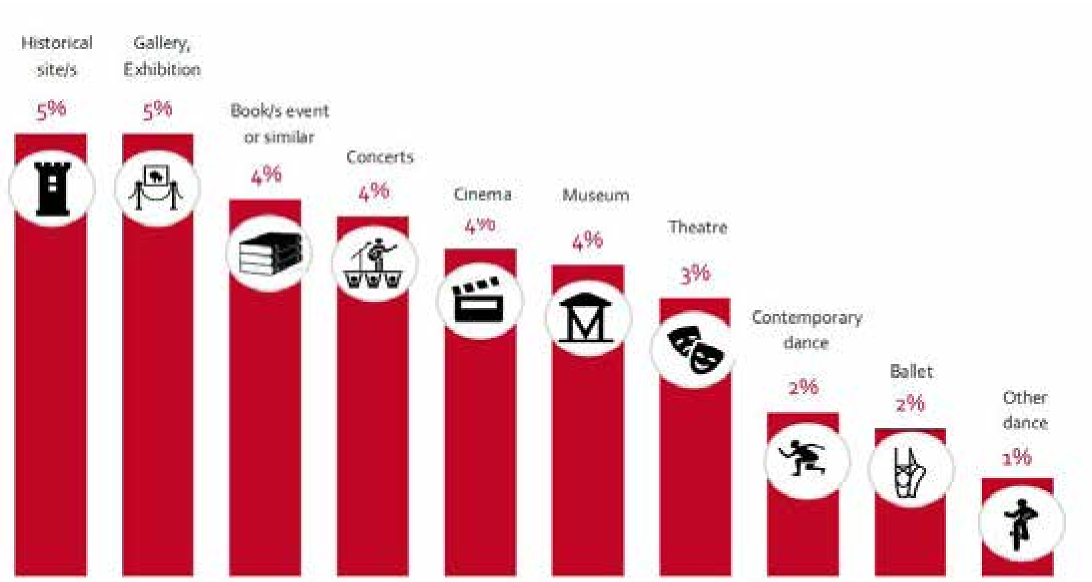


3.4 In-person attendance following lockdown

3.4.1 ATTENDED

Following lockdown, respondents have not yet commenced attending arts and cultural events with the same frequency that they did prior to lockdown, with all events under review attaining a score of 5% or less.

FIGURE 13: IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN



Historical sites

- No noticeable variance was observed when analysing data by gender in terms of attendance to historical sites following lockdown.
- With 10% positive responses, the 18 to 24 age cohort were the ones to visit most. Conversely, only 2% of those aged 65 and over visited historical sites post-lockdown.
- Marginal variances were observed when analysing data by region.
- 7% of those that had completed tertiary education indicated to have visited historical sites following lockdown. Conversely, none of those that had just completed primary education had visited.

TABLE 66: HISTORICAL SITES IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY GENDER

	Female	Male
Attended	6%	4%

TABLE 67: HISTORICAL SITES IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Attended	10%	5%	4%	7%	6%	2%

TABLE 68: HISTORICAL SITES IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
Attended	6%	7%	4%	5%	5%	3%

TABLE 69: HISTORICAL SITES IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY HIGHEST LEVEL OF EDUCATION

	Primary	Secondary	Post-secondary	Tertiary
Attended	0%	3%	4%	7%

Art gallery, exhibition, photographhc exhibition, crafts displays or similar

- No noticeable variance was observed when analysing data by gender in terms of attendance to gallery/exhibition sites following lockdown.
- The 18 to 34 age cohorts were the ones to visit most. Conversely, only 1% of those aged 65 and over have visited.
- Marginal variances were observed when analysing data by region, with none of the Gozitans attending.
- 8% of those that had completed tertiary education have attended a gallery/exhibition following lockdown.

TABLE 70: GALLERY/EXHIBITION IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY GENDER

	Female	Male
Attended	5%	5%

TABLE 71: GALLERY/EXHIBITION IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Attended	11%	10%	2%	5%	4%	1%

TABLE 72: GALLERY/EXHIBITION IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
Attended	0%	5%	7%	7%	4%	5%

TABLE 73: GALLERY/EXHIBITION IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY HIGHEST LEVEL OF EDUCATION

	Primary	Secondary	Post-secondary	Tertiary
Attended	3%	3%	3%	8%

Event or festival connected with books, writing, literature or poetry

- No noticeable variance was observed when analysing data by gender.
- With 9% positive responses, the 35 to 44 age cohort was the most likely to attend such an event.
- Marginal variances were observed when analysing data by region, with Gozitans attaining the highest positive score with 8% indicating to have attended a book-related event.
- No distinct variances were observed while analysing data by educational level completed.

TABLE 74: BOOKS RELATED EVENTS IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY GENDER

	Female	Male
Attended	5%	4%

TABLE 75: BOOKS RELATED EVENTS IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Attended	5%	3%	9%	4%	2%	3%

TABLE 76: BOOKS RELATED EVENTS IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
Attended	8%	3%	3%	5%	5%	4%

TABLE 77: BOOKS RELATED EVENTS IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Attended	3%	3%	3%	5%

Concert/live music performance

- No noticeable variance was observed when analysing data by gender in terms of attendance to concerts following lockdown.
- With 11% positive responses, the 18 to 24 age cohort were the ones to attend most. Conversely, only 1% of those aged 55 and over have attended.
- Marginal variances were observed when analysing data by region with residents of the South Eastern region being the ones most inclined to have attended a concert (7%).
- 6% of those that had completed tertiary education have a concert following lockdown. Conversely, none of those that had just completed primary education had attended.

TABLE 78: CONCERTS/LIVE MUSIC EVENTS IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY GENDER

	Female	Male
Attended	5%	3%

TABLE 79: CONCERTS/LIVE MUSIC EVENTS IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Attended	11%	6%	4%	4%	1%	1%

TABLE 80: CONCERTS/LIVE MUSIC EVENTS IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
Attended	3%	3%	3%	7%	4%	4%

TABLE 81: CONCERTS/LIVE MUSIC EVENTS IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Attended	0%	2%	4%	6%

Cinema or other projected artistic performance

- No noticeable variance was observed when analysing data by gender.
- With 8% positive responses, the 18 to 24 age cohort were the ones to visit most. Conversely, none of those aged 65 and over have visited.
- Marginal variances were observed when analysing data by region.
- 7% of those that had completed tertiary education indicated to have visited historical sites following lockdown. Conversely, none of those that had just completed primary education had visited.

TABLE 82: CINEMA OR OTHER PROJECTED ARTISTIC PERFORMANCE IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY GENDER

	Female	Male
Attended	3%	4%

TABLE 83: CINEMA OR OTHER PROJECTED ARTISTIC PERFORMANCE IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Attended	8%	4%	2%	8%	3%	0%

TABLE 84: CINEMA OR OTHER PROJECTED ARTISTIC PERFORMANCE IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
Attended	0%	3%	3%	5%	4%	5%

TABLE 85: CINEMA OR OTHER PROJECTED ARTISTIC PERFORMANCE IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Attended	0%	1%	3%	7%

Museum

- No noticeable variance was observed when analysing data by gender in terms of attendance to a museum following lockdown.
- With 8% positive responses, the 18 to 24 age cohort were the ones to visit most.
- Marginal variances were observed when analysing data by region.
- 5% of those that had completed tertiary education indicated to have visited a museum following lockdown. Conversely, none of those that had just completed primary education had visited.

TABLE 86: MUSEUM IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY GENDER

	Female	Male
Attended	3%	4%

TABLE 87: MUSEUM IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Attended	8%	5%	2%	3%	3%	2%

TABLE 88: MUSEUM IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY REGION

	Gozo	Northern Harbour	Northern Region	South Eastern	Southern Harbour	Western
Attended	3%	3%	7%	4%	3%	1%

TABLE 89: MUSEUM IN-PERSON ATTENDANCE FOLLOWING LOCKDOWN SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Attended	0%	2%	3%	5%

3.4.2 LIKELY FUTURE ATTENDANCE

The survey sought to determine the likely future in-person attendance, with the longitudinal approach evidencing how peoples' inclination to attend an event increased over time. Such optimism also coincided with the launch and subsequent uptake of the vaccination. The data indicates how the percentage of those opting to wait for a vaccination prior to attending an event decreased from one wave to the next (in line with the increase in vaccination uptake of the population). While people were overall very reluctant to attend an event during Wave 1 and Wave 2, in Wave 3 people felt more optimistic in their responses.

TABLE 90: LIKELY IN-PERSON ATTENDANCE TO DIFFERENT EVENTS OVER THE COMING 12 MONTHS

	Theatre			Concert		
	Wave 1	Wave 2	Wave 3	Wave 1	Wave 2	Wave 3
Likely to do so over the coming month	2%	2%	6%	1%	2%	7%
Likely to do so over the coming 2 to 3 months	1%	1%	11%	1%	1%	11%
Likely to do so over the coming 4 to 6 months	1%	0%	5%	1%	1%	4%
Likely but not within the next 6 months	3%	1%	3%	1%	1%	4%
Will wait for a vaccine	32%	17%	0%	29%	17%	0%
Not sure	6%	13%	19%	5%	12%	17%
Not interested	54%	66%	55%	61%	67%	56%

	Ballet			Contemporary dance			Other dance		
	Wave 1	Wave 2	Wave 3	Wave 1	Wave 2	Wave 3	Wave 1	Wave 2	Wave 3
Likely to do so over the coming month	1%	1%	4%	1%	1%	3%	1%	1%	3%
Likely to do so over the coming 2 to 3 months	0%	0%	4%	0%	0%	4%	0%	0%	4%
Likely to do so over the coming 4 to 6 months	0%	0%	1%	0%	0%	1%	0%	0%	1%
Likely but not within the next 6 months	1%	0%	2%	1%	0%	2%	1%	0%	2%
Will wait for a vaccine	11%	7%	0%	12%	11%	0%	13%	11%	0%
Not sure	3%	11%	18%	3%	7%	19%	3%	7%	19%
Not interested	85%	81%	72%	84%	81%	71%	83%	81%	71%

	Cinema			Art Gallery			Books event		
	Wave 1	Wave 2	Wave 3	Wave 1	Wave 2	Wave 3	Wave 1	Wave 2	Wave 3
Likely to do so over the coming month	1%	1%	4%	1%	1%	6%	1%	1%	9%
Likely to do so over the coming 2 to 3 months	1%	0%	5%	1%	0%	7%	0%	0%	5%
Likely to do so over the coming 4 to 6 months	1%	0%	2%	0%	0%	2%	0%	0%	3%
Likely but not within the next 6 months	2%	0%	3%	2%	0%	2%	1%	0%	3%
Will wait for a vaccine	14%	9%	0%	18%	12%	0%	17%	11%	0%
Not sure	3%	11%	20%	3%	11%	19%	3%	11%	20%
Not interested	79%	79%	67%	75%	75%	64%	77%	76%	61%

	Museum			Historical site		
	Wave 1	Wave 2	Wave 3	Wave 1	Wave 2	Wave 3
Likely to do so over the coming month	1%	4%	10%	2%	4%	10%
Likely to do so over the coming 2 to 3 months	1%	2%	8%	1%	2%	7%
Likely to do so over the coming 4 to 6 months	0%	1%	2%	1%	1%	4%
Likely but not within the next 6 months	2%	1%	3%	2%	0%	3%
Will wait for a vaccine	24%	14%	0%	23%	15%	0%
Not sure	6%	12%	17%	7%	12%	17%
Not interested	65%	66%	59%	64%	66%	59%

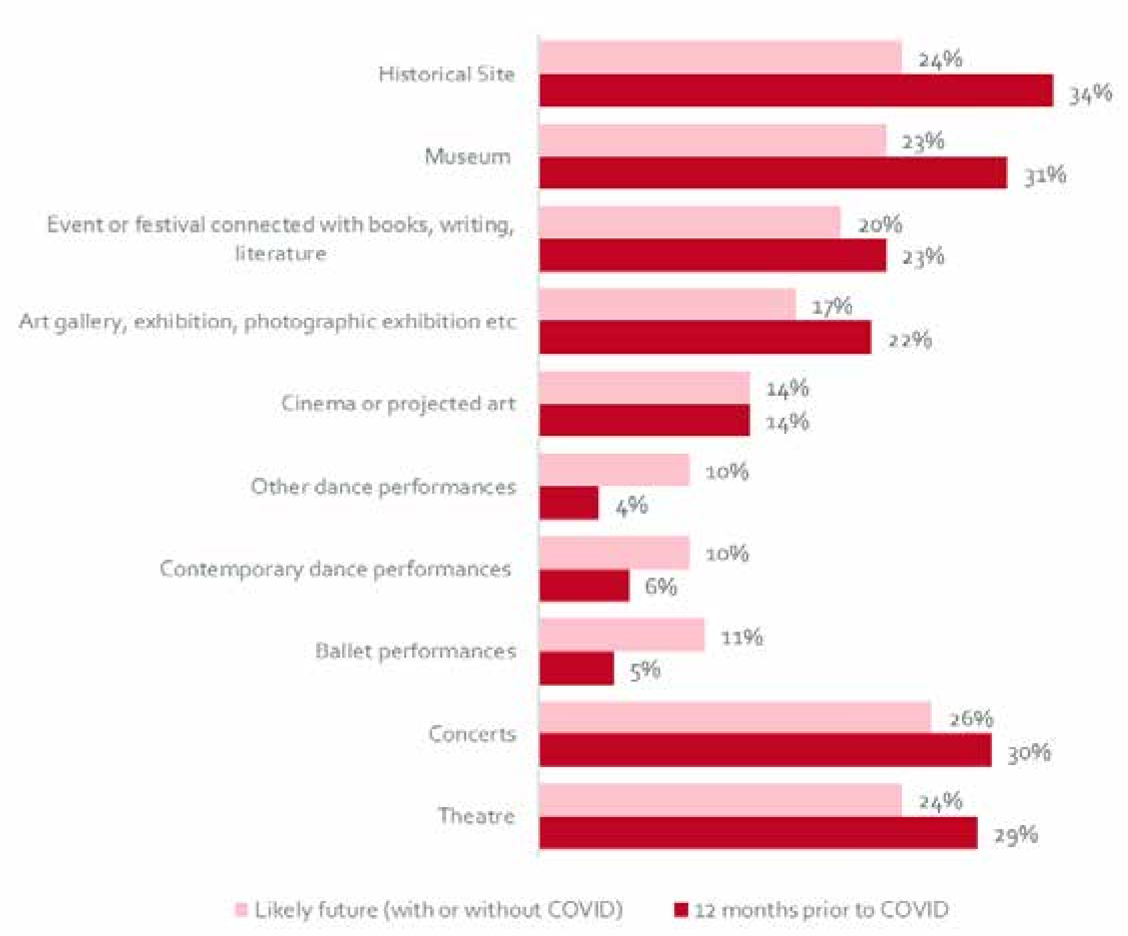
3.4.3 LIKELY FUTURE IN-PERSON ATTENDANCE

Responses of respondents' likely future attendance to arts and cultural events were cross-analysed against their attendance to arts and culture events in the 12 months prior to COVID-19.

The below table presents such analysis and illustrates that:

- In the majority of instances, the percentage for likely future attendance is marginally lower than that for past attendance
- Museums and historical sites are the most likely to be adversely impacted (with decreases of 10% and 8% respectively)
- Respondents' future attendance to ballet, contemporary dance and other dance is likely to be higher than it was in the 12 months prior to COVID.

FIGURE 14: RESPONDENTS' ATTENDANCE TO ARTS AND CULTURE EVENTS IN THE 12 MONTHS PRIOR TO COVID-19 AND THEIR INDICATED LIKELY FUTURE ATTENDANCE TO SUCH EVENTS (WITH OR WITHOUT COVID-19)



Wave 3 analysis by activity

Theatre performance drama, musical, comedy, pantomime or similar

- 20% of females indicated that they were likely to attend theatre over the next month to 3 months as opposed to 14% of males.
- Furthermore, females are marginally more interested in attending live theatre over the next 6 months than males (31% as opposed to 21% of males).
- 15% of Gozitans are likely to visit a live theatre performance over the coming month. With 64% mentions, those residing in the Southern Harbour region are least interested in live theatre.
- 11% of those that completed tertiary education noted their likelihood to attend over the coming month while another 17% are likely to do so over the next 2 to 3 months.

TABLE 91: LIKELY IN-PERSON ATTENDANCE TO LIVE THEATRE OVER THE COMING 12 MONTHS SPLIT BY GENDER

	Female	Male
Likely to do so over the coming month	6%	5%
Likely to do so over the coming 2 to 3 months	14%	9%
Likely to do so over the coming 4 to 6 months	5%	6%
Likely but not within the next 6 months	6%	1%
Not sure	19%	19%
Not interested	50%	58%

TABLE 92: LIKELY IN-PERSON ATTENDANCE TO LIVE THEATRE OVER THE COMING 12 MONTHS SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Likely to do so over the coming month	11%	7%	8%	5%	3%	4%
Likely to do so over the coming 2 to 3 months	21%	12%	13%	12%	8%	6%
Likely to do so over the coming 4 to 6 months	6%	9%	5%	5%	4%	2%
Likely but not within the next 6 months	2%	4%	5%	1%	4%	3%
Will wait for a vaccine	2%	0%	0%	0%	1%	0%
Not sure	23%	21%	17%	22%	13%	20%
Not interested	35%	47%	51%	54%	65%	66%

TABLE 93: LIKELY IN-PERSON ATTENDANCE TO LIVE THEATRE OVER THE COMING 12 MONTHS SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Likely to do so over the coming month	15%	6%	4%	9%	1%	7%
Likely to do so over the coming 2 to 3 months	6%	11%	12%	9%	9%	18%
Likely to do so over the coming 4 to 6 months	3%	10%	6%	1%	3%	3%
Likely but not within the next 6 months	9%	6%	1%	2%	1%	3%
Will wait for a vaccine	0%	0%	1%	0%	1%	0%
Not sure	12%	8%	20%	38%	20%	20%
Not interested	56%	58%	55%	40%	64%	50%

TABLE 94: LIKELY IN-PERSON ATTENDANCE TO LIVE THEATRE OVER THE COMING 12 MONTHS SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Likely to do so over the coming month	6%	2%	6%	11%
Likely to do so over the coming 2 to 3 months	0%	7%	14%	17%
Likely to do so over the coming 4 to 6 months	0%	3%	3%	9%
Likely but not within the next 6 months	3%	2%	4%	5%
Will wait for a vaccine	0%	0%	1%	0%
Not sure	14%	17%	22%	20%
Not interested	77%	67%	50%	37%

Concert/live music performance

- Females were marginally more likely to attend a concert/live music performance than males (30% as opposed to 24%).
- Interest in live concerts decreases with age, with 32% of those aged 18 to 24 likely to do so over the coming 3 months as opposed to 10% of those aged 65 and over.
- Individuals residing in the South Eastern region and those residing in the Western region were most likely to visit over the coming 3 months (25% responses each).
- 30% of those that completed tertiary education noted their likelihood to attend over the coming 3 months.

TABLE 95: LIKELY IN-PERSON ATTENDANCE TO CONCERT/LIVE MUSIC EVENT OVER THE COMING 12 MONTHS SPLIT BY GENDER

	Female	Male
Likely to do so over the coming month	8%	6%
Likely to do so over the coming 2 to 3 months	12%	11%
Likely to do so over the coming 4 to 6 months	3%	4%
Likely but not within the next 6 months	6%	3%
Will wait for a vaccine	1%	0%
Not sure	17%	18%
Not interested	53%	58%

TABLE 96: LIKELY IN-PERSON ATTENDANCE TO CONCERT/LIVE MUSIC EVENT OVER THE COMING 12 MONTHS SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Likely to do so over the coming month	13%	13%	8%	8%	2%	3%
Likely to do so over the coming 2 to 3 months	19%	10%	9%	18%	10%	7%
Likely to do so over the coming 4 to 6 months	5%	5%	5%	1%	4%	2%
Likely but not within the next 6 months	5%	3%	7%	4%	4%	4%
Will wait for a vaccine	2%	0%	0%	0%	1%	1%
Not sure	24%	18%	20%	15%	12%	16%
Not interested	32%	50%	52%	54%	65%	68%

TABLE 97: LIKELY IN-PERSON ATTENDANCE TO CONCERT/LIVE MUSIC EVENT OVER THE COMING 12 MONTHS SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Likely to do so over the coming month	15%	5%	4%	14%	6%	7%
Likely to do so over the coming 2 to 3 months	3%	11%	12%	11%	9%	18%
Likely to do so over the coming 4 to 6 months	3%	5%	4%	2%	3%	3%
Likely but not within the next 6 months	6%	8%	4%	2%	2%	1%
Will wait for a vaccine	0%	1%	0%	0%	1%	0%
Not sure	12%	8%	20%	35%	14%	18%
Not interested	62%	61%	54%	35%	64%	54%

TABLE 98: LIKELY IN-PERSON ATTENDANCE TO CONCERT/LIVE MUSIC EVENT OVER THE COMING 12 MONTHS SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Likely to do so over the coming month	6%	3%	7%	13%
Likely to do so over the coming 2 to 3 months	0%	9%	12%	17%
Likely to do so over the coming 4 to 6 months	0%	3%	3%	6%
Likely but not within the next 6 months	3%	3%	6%	5%
Will wait for a vaccine	0%	1%	0%	0%
Not sure	11%	15%	24%	17%
Not interested	80%	65%	49%	42%

Ballet performance

- 12% of females are likely to attend a ballet performance over the coming 3 months as opposed to 3% of males.
- People residing in the Southern Harbour region are least inclined to attend in the near future.

TABLE 99: LIKELY IN-PERSON ATTENDANCE TO BALLET PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY GENDER

	Female	Male
Likely to do so over the coming month	6%	2%
Likely to do so over the coming 2 to 3 months	6%	1%
Likely to do so over the coming 4 to 6 months	1%	0%
Likely but not within the next 6 months	2%	1%
Will wait for a vaccine	0%	0%
Not sure	18%	19%
Not interested	67%	77%

TABLE 100: LIKELY IN-PERSON ATTENDANCE TO BALLET PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Likely to do so over the coming month	13%	3%	7%	3%	1%	0%
Likely to do so over the coming 2 to 3 months	21%	0%	1%	3%	3%	0%
Likely to do so over the coming 4 to 6 months	2%	1%	0%	1%	0%	0%
Likely but not within the next 6 months	0%	1%	3%	1%	2%	1%
Will wait for a vaccine	2%	0%	0%	0%	1%	0%
Not sure	23%	20%	17%	19%	13%	19%
Not interested	40%	75%	72%	73%	79%	80%

TABLE 101: LIKELY IN-PERSON ATTENDANCE TO BALLET PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Likely to do so over the coming month	9%	5%	2%	1%	1%	7%
Likely to do so over the coming 2 to 3 months	3%	4%	3%	2%	0%	4%
Likely to do so over the coming 4 to 6 months	3%	0%	1%	0%	0%	0%
Likely but not within the next 6 months	3%	5%	0%	0%	0%	1%
Will wait for a vaccine	0%	0%	1%	0%	1%	0%
Not sure	15%	9%	12%	45%	13%	12%
Not interested	68%	78%	41%	52%	82%	76%

TABLE 102: LIKELY IN-PERSON ATTENDANCE TO BALLET PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Likely to do so over the coming month	0%	1%	5%	6%
Likely to do so over the coming 2 to 3 months	0%	1%	5%	7%
Likely to do so over the coming 4 to 6 months	0%	0%	0%	2%
Likely but not within the next 6 months	0%	1%	2%	3%
Will wait for a vaccine	0%	0%	1%	0%
Not sure	9%	14%	25%	21%
Not interested	91%	82%	62%	62%

Contemporary dance performance

- 12% of females are likely to attend a contemporary dance performance over the coming 3 months as opposed to 3% of males.
- Those aged 18 to 24 are much more likely to attend than other age groups.
- The residents of the South Eastern region are least likely to attend in the near future.

TABLE 103: LIKELY IN-PERSON ATTENDANCE TO CONTEMPORARY DANCE PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY GENDER

	Female	Male
Likely to do so over the coming month	5%	1%
Likely to do so over the coming 2 to 3 months	7%	2%
Likely to do so over the coming 4 to 6 months	1%	0%
Likely but not within the next 6 months	3%	1%
Will wait for a vaccine	0%	0%
Not sure	19%	19%
Not interested	66%	77%

TABLE 104: LIKELY IN-PERSON ATTENDANCE TO CONTEMPORARY DANCE PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Likely to do so over the coming month	10%	2%	7%	1%	1%	0%
Likely to do so over the coming 2 to 3 months	24%	1%	2%	1%	3%	0%
Likely to do so over the coming 4 to 6 months	2%	2%	0%	0%	0%	0%
Likely but not within the next 6 months	0%	3%	2%	3%	2%	2%
Will wait for a vaccine	0%	0%	0%	0%	1%	0%
Not sure	23%	18%	18%	22%	13%	19%
Not interested	42%	73%	71%	73%	79%	79%

TABLE 105: LIKELY IN-PERSON ATTENDANCE TO CONTEMPORARY DANCE PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Likely to do so over the coming month	6%	4%	3%	1%	1%	4%
Likely to do so over the coming 2 to 3 months	3%	6%	6%	1%	3%	4%
Likely to do so over the coming 4 to 6 months	3%	1%	1%	0%	0%	0%
Likely but not within the next 6 months	3%	6%	0%	0%	0%	1%
Will wait for a vaccine	0%	0%	0%	0%	1%	0%
Not sure	15%	8%	21%	46%	13%	14%
Not interested	71%	75%	69%	52%	81%	77%

TABLE 106: LIKELY IN-PERSON ATTENDANCE TO CONTEMPORARY DANCE PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Likely to do so over the coming month	0%	2%	4%	4%
Likely to do so over the coming 2 to 3 months	0%	1%	7%	6%
Likely to do so over the coming 4 to 6 months	0%	0%	0%	2%
Likely but not within the next 6 months	0%	2%	3%	2%
Will wait for a vaccine	0%	0%	0%	0%
Not sure	9%	14%	26%	21%
Not interested	91%	79%	61%	64%

Other dance performance

11% of females are likely to attend another dance performance over the coming 3 months as opposed to 3% of males.

TABLE 107: LIKELY IN-PERSON ATTENDANCE TO OTHER DANCE PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY GENDER

	Female	Male
Likely to do so over the coming month	5%	1%
Likely to do so over the coming 2 to 3 months	6%	2%
Likely to do so over the coming 4 to 6 months	1%	0%
Likely but not within the next 6 months	3%	1%
Will wait for a vaccine	0%	77%
Not sure	19%	19%
Not interested	67%	77%

TABLE 108: LIKELY IN-PERSON ATTENDANCE TO OTHER DANCE PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Likely to do so over the coming month	11%	3%	7%	1%	1%	0%
Likely to do so over the coming 2 to 3 months	21%	1%	1%	1%	3%	0%
Likely to do so over the coming 4 to 6 months	3%	1%	0%	0%	0%	0%
Likely but not within the next 6 months	0%	2%	2%	1%	2%	2%
Will wait for a vaccine	0%	0%	0%	0%	1%	0%
Not sure	24%	18%	18%	23%	13%	19%
Not interested	40%	74%	72%	73%	79%	79%

TABLE 109: LIKELY IN-PERSON ATTENDANCE TO OTHER DANCE PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Likely to do so over the coming month	9%	5%	3%	1%	1%	4%
Likely to do so over the coming 2 to 3 months	3%	5%	6%	1%	2%	3%
Likely to do so over the coming 4 to 6 months	3%	0%	1%	0%	0%	1%
Likely but not within the next 6 months	3%	5%	0%	0%	0%	1%
Will wait for a vaccine	0%	0%	0%	0%	1%	0%
Not sure	15%	8%	22%	46%	13%	15%
Not interested	68%	77%	67%	52%	82%	76%

TABLE 110: LIKELY IN-PERSON ATTENDANCE TO OTHER DANCE PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Likely to do so over the coming month	0%	2%	4%	5%
Likely to do so over the coming 2 to 3 months	0%	1%	6%	5%
Likely to do so over the coming 4 to 6 months	0%	0%	1%	1%
Likely but not within the next 6 months	0%	2%	2%	2%
Will wait for a vaccine	0%	0%	0%	0%
Not sure	9%	15%	27%	21%
Not interested	91%	79%	61%	65%

Cinema or other projected artistic performance

- No significant variances were observed when analysing data by gender.

TABLE 111: LIKELY IN-PERSON ATTENDANCE TO CINEMA OR OTHER PROJECTED ARTISTIC PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY GENDER

	Female	Male
Likely to do so over the coming month	4%	4%
Likely to do so over the coming 2 to 3 months	6%	3%
Likely to do so over the coming 4 to 6 months	1%	3%
Likely but not within the next 6 months	4%	2%
Will wait for a vaccine	0%	0%
Not sure	20%	19%
Not interested	65%	69%

TABLE 112: LIKELY IN-PERSON ATTENDANCE TO CINEMA OR OTHER PROJECTED ARTISTIC PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Likely to do so over the coming month	10%	5%	4%	7%		1%
Likely to do so over the coming 2 to 3 months	2%	3%	4%	3%	7%	1%
Likely to do so over the coming 4 to 6 months	13%	4%	2%	3%	2%	0%
Likely but not within the next 6 months	2%	3%	4%	3%	3%	1%
Will wait for a vaccine	0%	0%	0%	0%	1%	0%
Not sure	24%	20%	21%	20%	16%	19%
Not interested	50%	64%	64%	65%	71%	78%

TABLE 113: LIKELY IN-PERSON ATTENDANCE TO CINEMA OR OTHER PROJECTED ARTISTIC PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Likely to do so over the coming month	9%	5%	4%	2%	2%	4%
Likely to do so over the coming 2 to 3 months	6%	7%	8%	1%	3%	3%
Likely to do so over the coming 4 to 6 months	0%	5%	0%	1%	1%	1%
Likely but not within the next 6 months	3%	5%	2%	0%	1%	4%
Will wait for a vaccine	0%	0%	0%	0%	1%	0%
Not sure	12%	9%	20%	49%	16%	15%
Not interested	71%	70%	65%	46%	76%	73%

TABLE 114: LIKELY IN-PERSON ATTENDANCE TO CINEMA OR OTHER PROJECTED ARTISTIC PERFORMANCE OVER THE COMING 12 MONTHS SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Likely to do so over the coming month	6%	1%	4%	7%
Likely to do so over the coming 2 to 3 months	0%	3%	5%	7%
Likely to do so over the coming 4 to 6 months	0%	2%	1%	3%
Likely but not within the next 6 months	0%	1%	4%	5%
Will wait for a vaccine	0%	0%	0%	0%
Not sure	9%	14%	27%	23%
Not interested	86%	77%	59%	55%

Art Gallery, exhibition, photographic exhibition, crafts, displays or similar

- No significant variances were observed when analysing data by gender.
- The younger age cohorts are more inclined to visit over the coming 3 months as are those that have successfully completed post-secondary and tertiary education.

TABLE 115: LIKELY IN-PERSON ATTENDANCE TO ART GALLERY OR SIMILAR OVER THE COMING 12 MONTHS SPLIT BY GENDER

	Female	Male
Likely to do so over the coming month	7%	4%
Likely to do so over the coming 2 to 3 months	8%	5%
Likely to do so over the coming 4 to 6 months	2%	3%
Likely but not within the next 6 months	3%	1%
Will wait for a vaccine	0%	0%
Not sure	18%	20%
Not interested	62%	67%

TABLE 116: LIKELY IN-PERSON ATTENDANCE TO ART GALLERY OR SIMILAR OVER THE COMING 12 MONTHS SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Likely to do so over the coming month	13%	5%	9%	9%	2%	1%
Likely to do so over the coming 2 to 3 months	15%	5%	3%	5%	10%	4%
Likely to do so over the coming 4 to 6 months	2%	3%	0%	4%	4%	1%
Likely but not within the next 6 months	0%	2%	4%	1%	4%	1%
Will wait for a vaccine	0%	0%	0%	0%	0%	0%
Not sure	24%	18%	20%	22%	11%	19%
Not interested	47%	65%	64%	58%	67%	75%

TABLE 117: LIKELY IN-PERSON ATTENDANCE TO ART GALLERY OR SIMILAR OVER THE COMING 12 MONTHS SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Likely to do so over the coming month	6%	6%	8%	4%	2%	11%
Likely to do so over the coming 2 to 3 months	9%	9%	6%	2%	9%	4%
Likely to do so over the coming 4 to 6 months	0%	3%	1%	2%	3%	3%
Likely but not within the next 6 months	6%	5%	1%	1%	0%	0%
Will wait for a vaccine	0%	0%	0%	0%	0%	0%
Not sure	12%	9%	21%	45%	11%	16%
Not interested	68%	68%	63%	46%	74%	66%

TABLE 118: LIKELY IN-PERSON ATTENDANCE TO ART GALLERY OR SIMILAR OVER THE COMING 12 MONTHS SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Likely to do so over the coming month	0%	4%	8%	8%
Likely to do so over the coming 2 to 3 months	6%	2%	8%	9%
Likely to do so over the coming 4 to 6 months	0%	2%	2%	3%
Likely but not within the next 6 months	0%	1%	3%	3%
Will wait for a vaccine	0%	0%	0%	0%
Not sure	11%	15%	26%	21%
Not interested	83%	75%	53%	55%

Event or festival connected with books, writing, literature or poetry

- A marginally higher percentage of females indicated their likelihood to attend such an event over the coming 3 months (16% as opposed to 11% of males).
- Those aged 35 to 44 and 18 to 24 are more likely to do so over the coming 3 months than the other age cohorts (22% and 21% respectively).

TABLE 119: LIKELY IN-PERSON ATTENDANCE TO BOOKS EVENT OR SIMILAR OVER THE COMING 12 MONTHS SPLIT BY GENDER

	Female	Male
Likely to do so over the coming month	10%	7%
Likely to do so over the coming 2 to 3 months	6%	4%
Likely to do so over the coming 4 to 6 months	3%	3%
Likely but not within the next 6 months	4%	1%
Will wait for a vaccine	0%	0%
Not sure	20%	20%
Not interested	57%	65%

TABLE 120: LIKELY IN-PERSON ATTENDANCE TO BOOKS EVENT OR SIMILAR OVER THE COMING 12 MONTHS SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Likely to do so over the coming month	10%	9%	17%	12%	1%	5%
Likely to do so over the coming 2 to 3 months	11%	4%	5%	4%	9%	0%
Likely to do so over the coming 4 to 6 months	3%	8%	1%	3%	1%	3%
Likely but not within the next 6 months	2%	2%	2%	1%	4%	3%
Will wait for a vaccine	0%	0%	0%	0%	0%	0%
Not sure	26%	23%	18%	23%	12%	19%
Not interested	48%	54%	55%	57%	72%	71%

TABLE 121: LIKELY IN-PERSON ATTENDANCE TO BOOKS EVENT OR SIMILAR OVER THE COMING 12 MONTHS SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Likely to do so over the coming month	12%	7%	10%	5%	8%	14%
Likely to do so over the coming 2 to 3 months	3%	7%	6%	0%	8%	4%
Likely to do so over the coming 4 to 6 months	0%	6%	2%	0%	2%	4%
Likely but not within the next 6 months	6%	6%	1%	0%	0%	1%
Will wait for a vaccine	0%	0%	0%	0%	0%	0%
Not sure	15%	9%	21%	51%	13%	15%
Not interested	65%	64%	60%	45%	69%	62%

TABLE 122: LIKELY IN-PERSON ATTENDANCE TO BOOKS EVENT OR SIMILAR OVER THE COMING 12 MONTHS SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Likely to do so over the coming month	6%	5%	9%	13%
Likely to do so over the coming 2 to 3 months	0%	3%	3%	9%
Likely to do so over the coming 4 to 6 months	0%	1%	3%	5%
Likely but not within the next 6 months	0%	2%	3%	3%
Will wait for a vaccine	0%	0%	0%	0%
Not sure	11%	15%	28%	23%
Not interested	83%	73%	54%	46%

Museum

No significant variances were observed when analysing data by gender.

TABLE 123: LIKELY IN-PERSON ATTENDANCE TO MUSEUM OVER THE COMING 12 MONTHS SPLIT BY GENDER

	Female	Male
Likely to do so over the coming month	12%	8%
Likely to do so over the coming 2 to 3 months	8%	8%
Likely to do so over the coming 4 to 6 months	3%	1%
Likely but not within the next 6 months	5%	2%
Will wait for a vaccine	0%	0%
Not sure	17%	18%
Not interested	56%	63%

TABLE 124: LIKELY IN-PERSON ATTENDANCE TO MUSEUM OVER THE COMING 12 MONTHS SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Likely to do so over the coming month	16%	12%	13%	9%	2%	8%
Likely to do so over the coming 2 to 3 months	11%	1%	10%	3%	8%	6%
Likely to do so over the coming 4 to 6 months	3%	2%	2%	1%	3%	2%
Likely but not within the next 6 months	3%	10%	5%	1%	7%	2%
Will wait for a vaccine	0%	0%	0%	0%	1%	0%
Not sure	24%	15%	16%	22%	13%	16%
Not interested	42%	60%	53%	64%	65%	66%

TABLE 125: LIKELY IN-PERSON ATTENDANCE TO MUSEUM OVER THE COMING 12 MONTHS SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Likely to do so over the coming month	12%	9%	11%	8%	9%	12%
Likely to do so over the coming 2 to 3 months	3%	10%	2%	8%	11%	7%
Likely to do so over the coming 4 to 6 months	12%	4%	3%	2%	1%	0%
Likely but not within the next 6 months	0%	6%	2%	0%	2%	1%
Will wait for a vaccine	0%	0%	0%	0%	1%	0%
Not sure	15%	7%	18%	41%	11%	19%
Not interested	59%	64%	63%	40%	64%	61%

TABLE 126: LIKELY IN-PERSON ATTENDANCE TO MUSEUM OVER THE COMING 12 MONTHS SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Likely to do so over the coming month	9%	6%	9%	15%
Likely to do so over the coming 2 to 3 months	9%	5%	6%	12%
Likely to do so over the coming 4 to 6 months	0%	2%	3%	3%
Likely but not within the next 6 months	0%	1%	6%	5%
Will wait for a vaccine	0%	0%	1%	0%
Not sure	6%	15%	26%	16%
Not interested	77%	70%	50%	50%

Historical sites

Females are marginally more inclined to visit within the coming 3 months (19% as opposed to 14% of males).

TABLE 127: LIKELY IN-PERSON ATTENDANCE TO HISTORICAL SITE/S OVER THE COMING 12 MONTHS SPLIT BY GENDER

	Female	Male
Likely to do so over the coming month	11%	8%
Likely to do so over the coming 2 to 3 months	8%	6%
Likely to do so over the coming 4 to 6 months	4%	3%
Likely but not within the next 6 months	4%	2%
Will wait for a vaccine	0%	0%
Not sure	17%	18%
Not interested	56%	62%

TABLE 128: LIKELY IN-PERSON ATTENDANCE TO HISTORICAL SITE/S OVER THE COMING 12 MONTHS SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Likely to do so over the coming month	16%	12%	14%	9%	2%	7%
Likely to do so over the coming 2 to 3 months	11%	8%	10%	3%	7%	6%
Likely to do so over the coming 4 to 6 months	6%	3%	2%	4%	4%	3%
Likely but not within the next 6 months	2%	3%	3%	1%	6%	2%
Will wait for a vaccine	0%	0%	0%	0%	1%	0%
Not sure	24%	14%	15%	19%	16%	17%
Not interested	40%	60%	55%	64%	64%	65%

TABLE 129: LIKELY IN-PERSON ATTENDANCE TO HISTORICAL SITE/S OVER THE COMING 12 MONTHS SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Likely to do so over the coming month	12%	7%	11%	11%	9%	12%
Likely to do so over the coming 2 to 3 months	3%	11%	3%	6%	8%	8%
Likely to do so over the coming 4 to 6 months	3%	7%	2%	1%	3%	1%
Likely but not within the next 6 months	9%	5%	3%	0%	0%	1%
Will wait for a vaccine	0%	0%	0%	0%	1%	0%
Not sure	18%	6%	18%	40%	12%	18%
Not interested	56%	63%	62%	42%	67%	59%

TABLE 130: LIKELY IN-PERSON ATTENDANCE TO HISTORICAL SITE/S OVER THE COMING 12 MONTHS SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Likely to do so over the coming month	9%	6%	9%	15%
Likely to do so over the coming 2 to 3 months	9%	5%	6%	11%
Likely to do so over the coming 4 to 6 months	0%	3%	3%	5%
Likely but not within the next 6 months	0%	1%	5%	4%
Will wait for a vaccine	0%	0%	1%	0%
Not sure	6%	15%	25%	48%
Not interested	77%	70%	50%	17%

3.5 Factors that could encourage increased attendance

An element of relevance when seeking to increase audience numbers relates to factors deemed important in the audiences' (and potential audience) decision-making process. In this regard, the research evidenced that COVID-19 is a primary consideration.

Indeed, in view of the current situation the primary factors noted by respondents all related to ways that would make them feel safe to visit a venue within this new reality.

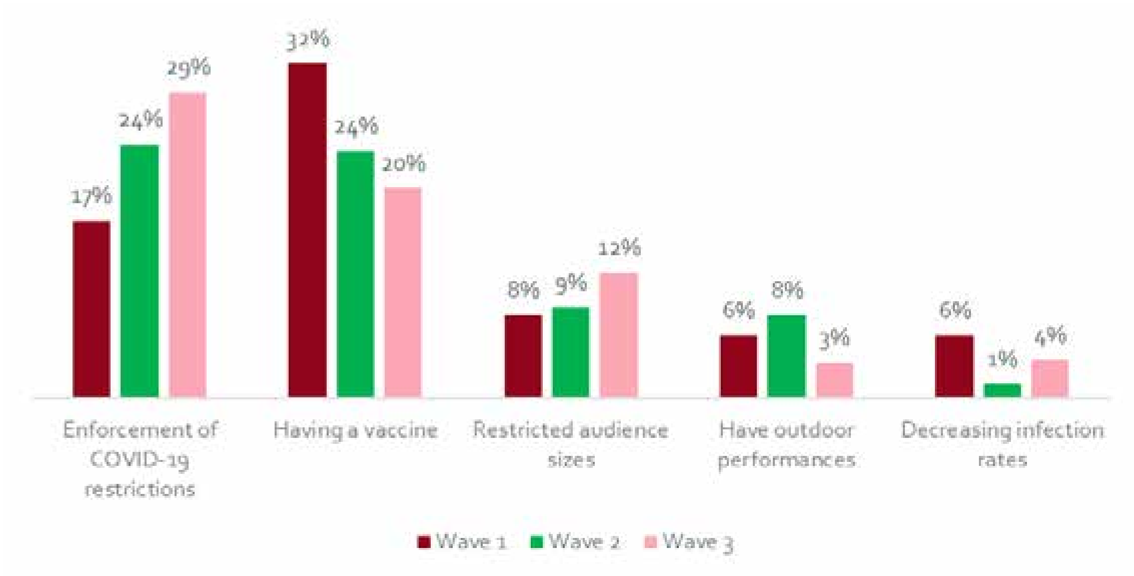
Throughout the project the primary factors noted were:

- Having a vaccine;
- Enforcement of COVID-19 restrictions.

In relation to the above, while the percentage of those indicating 'having a vaccine' decreased from one wave to the next (though still remaining a primary factor mentioned), 'enforcement of COVID-19 restrictions' increased from one wave to the next.

Having restricted audience sizes was the only other factor (under Wave 3) to attain a score above 10%.

FIGURE 15: TOP MENTIONED FACTORS THAT COULD INSTIGATE INCREASED ATTENDANCE



Other factors that were mentioned that got minimal responses were:

- Clear seating plans
- Stagger arrivals and departures where possible, to reduce congestion at points of entrance and exit and in common areas
- Trusted organiser/venue
- Family friendly measures
- Clear cancellation/money back policies
- Affordable options
- Limited number of people per event
- Easy parking

TABLE 131: TOP MENTIONED FACTORS THAT COULD INSTIGATE INCREASED ATTENDANCE SPLIT BY GENDER

	Female	Male
Decreasing infection rates	3%	3%
Enforcement of COVID-19 restrictions	31%	29%
Having a vaccine	19%	16%
Restricted audience sizes	8%	8%
Unsure	6%	5%
Nothing	25%	30%

TABLE 132: TOP MENTIONED FACTORS THAT COULD ENCOURAGE INCREASED ATTENDANCE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Decreasing infection rates	0%	3%	3%	7%	3%	1%
Enforcement of COVID-19 restrictions	37%	37%	32%	32%	28%	19%
Having a vaccine	29%	12%	12%	20%	19%	19%
Restricted audience sizes	8%	14%	10%	8%	4%	4%
Unsure	6%	3%	3%	7%	6%	8%
Nothing	10%	22%	32%	16%	34%	41%

TABLE 133: TOP MENTIONED FACTORS THAT COULD ENCOURAGE INCREASED ATTENDANCE SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Decreasing infection rates	0%	4%	3%	4%	0%	4%
Enforcement of COVID-19 restrictions	29%	30%	18%	41%	32%	28%
Having a vaccine	18%	12%	21%	12%	17%	34%
Restricted audience sizes	18%	8%	9%	4%	4%	11%
Unsure	3%	4%	8%	6%	7%	5%
Nothing	32%	28%	33%	26%	36%	9%

TABLE 134: TOP MENTIONED FACTORS THAT COULD ENCOURAGE INCREASED ATTENDANCE SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Decreasing infection rates	0%	4%	3%	2%
Enforcement of COVID-19 restrictions	14%	27%	34%	36%
Having a vaccine	17%	19%	18%	16%
Restricted audience sizes	9%	6%	6%	12%
Unsure	11%	5%	8%	3%
Nothing	46%	35%	23%	16%

3.6 Funding opportunities

The survey sought to determine potential funding mechanisms that local arts and culture entities ought to consider. In this respect, interviewees were presented with a number of statements and for each, they had to indicate the extent to which they agreed or disagreed with such statement. A 5-point Likert Scale was used where a score of 1 indicated that they totally disagreed with such statement, a score of 2 indicated that they disagreed, a score of 3 indicated neutral views, 4 that they agreed and 5 that they totally agreed with such statement.

3.6.1 DONATIONS

Overall individuals are not inclined to give a donation every time they view an event online. That said, those indicating to 'strongly disagree' (hence totally against the giving of a donation every time they viewed an event online) experienced a constant gradual decline from one wave to the next (45% in Wave 1, 39% in wave 2 and 37% in wave 3). Furthermore, respondents' willingness to pay (giving a score of 4 or 5) has increased marginally over time (from Wave 1 to Wave 3), with 26% indicating to agree/strongly agree (in Wave 3 as opposed to 12% in Wave 1).

FIGURE 16: YOU ARE WILLING TO GIVE A DONATION EVERY TIME YOU VIEW AN EVENT ONLINE

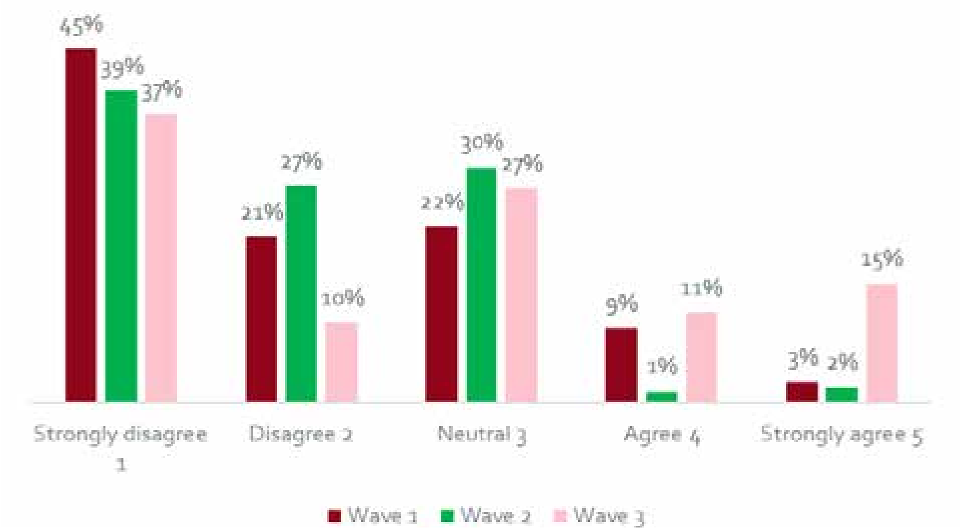


TABLE 135: RESPONDENTS' WILLINGNESS TO GIVE A DONATION EVERY TIME YOU VIEW AN EVENT ONLINE SPLIT BY GENDER

	Female	Male
Strongly disagree	35%	38%
Disagree	10%	10%
Neutral	26%	28%
Agree	12%	10%
Strongly agree	17%	13%

TABLE 136: RESPONDENTS' WILLINGNESS TO GIVE A DONATION EVERY TIME YOU VIEW AN EVENT ONLINE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	29%	26%	36%	34%	54%	38%
Disagree	15%	15%	7%	8%	10%	7%
Neutral	39%	29%	18%	23%	22%	32%
Agree	6%	8%	17%	20%	8%	9%
Strongly agree	11%	22%	22%	15%	6%	14%

TABLE 137: RESPONDENTS' WILLINGNESS TO GIVE A DONATION EVERY TIME YOU VIEW AN EVENT ONLINE SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	35%	45%	34%	20%	48%	30%
Disagree	9%	10%	3%	14%	12%	11%
Neutral	26%	18%	38%	36%	16%	36%
Agree	6%	7%	9%	24%	9%	15%
Strongly agree	24%	21%	16%	6%	16%	8%

TABLE 138: RESPONDENTS' WILLINGNESS TO GIVE A DONATION EVERY TIME YOU VIEW AN EVENT ONLINE SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	51%	41%	36%	25%
Disagree	6%	11%	13%	7%
Neutral	31%	27%	30%	25%
Agree	3%	10%	7%	20%
Strongly agree	9%	12%	13%	23%

3.6.2 PAY PER VIEW

When determining respondents' willing to pay per view for each event viewed online, 23% responded positively in Wave 3. Such figure represents a marked increase over the previous waves (10% in Wave 1 and 3% in Wave 2). Likewise, those in disagreement (strongly disagree and disagree) decreased from 69% in Wave 1 to 55% in Wave 3.

FIGURE 17: YOU ARE WILLING TO PAY PER VIEW EVERY TIME YOU VIEW AN EVENT ONLINE

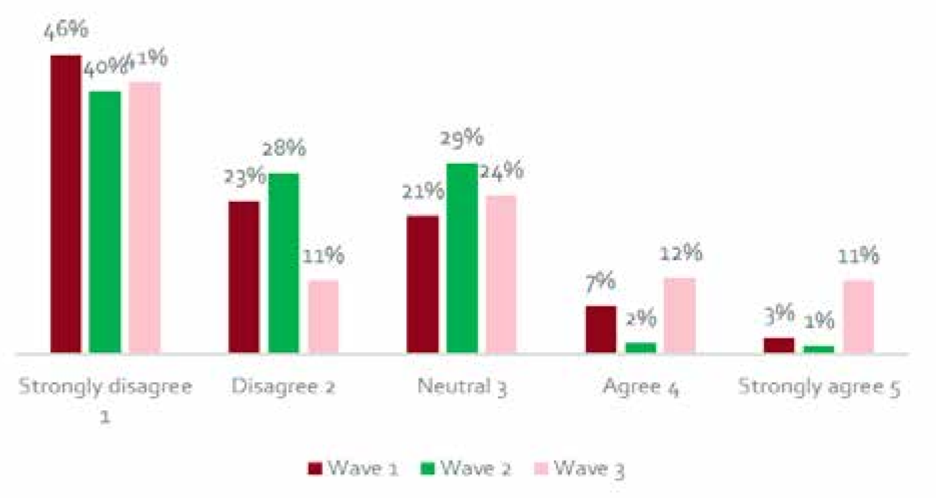


TABLE 139: RESPONDENTS' WILLINGNESS TO PAY PER VIEW EVERY TIME YOU VIEW AN EVENT ONLINE SPLIT BY GENDER

	Female	Male
Strongly disagree	38%	44%
Disagree	9%	13%
Neutral	26%	23%
Agree	13%	10%
Strongly agree	14%	9%

TABLE 140: RESPONDENTS' WILLINGNESS TO PAY PER VIEW EVERY TIME YOU VIEW AN EVENT ONLINE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	29%	32%	39%	39%	63%	42%
Disagree	23%	20%	7%	8%	8%	7%
Neutral	29%	16%	24%	24%	17%	34%
Agree	5%	17%	14%	19%	7%	8%
Strongly agree	15%	15%	16%	9%	6%	8%

TABLE 141: RESPONDENTS' WILLINGNESS TO PAY PER VIEW EVERY TIME YOU VIEW AN EVENT ONLINE SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	41%	52%	30%	21%	57%	38%
Disagree	9%	9%	9%	15%	19%	7%
Neutral	26%	13%	37%	36%	8%	36%
Agree	6%	10%	10%	22%	8%	12%
Strongly agree	18%	16%	13%	5%	9%	7%

TABLE 142: RESPONDENTS' WILLINGNESS TO PAY PER VIEW EVERY TIME YOU VIEW AN EVENT ONLINE SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	51%	50%	39%	28%
Disagree	3%	9%	15%	13%
Neutral	34%	26%	24%	21%
Agree	6%	8%	11%	19%
Strongly agree	6%	7%	12%	18%

3.6.3 YEARLY SUBSCRIPTION

Once again, in Wave 3 respondents were more positive in their views than in the previous waves with 16% noting to be willing to pay a monthly subscription for online arts events/production (with 7% noting to agree with the statement and 9% strongly agreeing with the statement).

FIGURE 18: YOU ARE WILLING TO PAY FOR A MONTHLY SUBSCRIPTION FOR ONLINE ARTS EVENTS/PRODUCTION

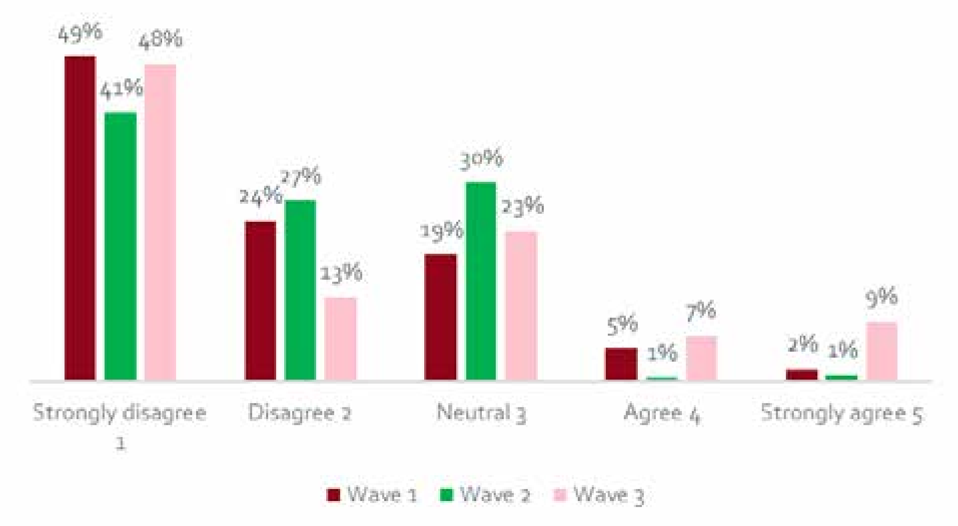


TABLE 143: RESPONDENTS' WILLINGNESS TO PAY FOR A MONTHLY SUBSCRIPTION FOR ONLINE ARTS EVENTS/PRODUCTION SPLIT BY GENDER

	Female	Male
Strongly disagree	47%	49%
Disagree	12%	14%
Neutral	26%	20%
Agree	6%	8%
Strongly agree	9%	9%

TABLE 144: RESPONDENTS' WILLINGNESS TO PAY FOR A MONTHLY SUBSCRIPTION FOR ONLINE ARTS EVENTS/PRODUCTION SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	39%	37%	45%	53%	66%	48%
Disagree	12%	19%	15%	15%	9%	10%
Neutral	24%	26%	20%	20%	11%	34%
Agree	13%	5%	10%	7%	6%	2%
Strongly agree	12%	13%	11%	5%	8%	6%

TABLE 145: RESPONDENTS' WILLINGNESS TO PAY FOR A MONTHLY SUBSCRIPTION FOR ONLINE ARTS EVENTS/PRODUCTION SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	53%	57%	43%	29%	57%	46%
Disagree	9%	11%	7%	25%	14%	11%
Neutral	21%	12%	37%	29%	13%	32%
Agree	3%	7%	3%	8%	9%	8%
Strongly agree	15%	12%	10%	8%	7%	3%

TABLE 146: RESPONDENTS' WILLINGNESS TO PAY FOR A MONTHLY SUBSCRIPTION FOR ONLINE ARTS EVENTS/PRODUCTION SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	54%	54%	47%	40%
Disagree	3%	13%	16%	13%
Neutral	40%	22%	24%	19%
Agree	0%	3%	6%	15%
Strongly agree	3%	9%	8%	13%

3.6.4 SPONSORSHIP

With under 10% positive responses, overall, respondents are not willing to sponsor an arts organisation or performance/production.

FIGURE 19: YOU ARE WILLING TO SPONSOR AN ARTS ORGANISATION OR PERFORMANCE/PRODUCTION

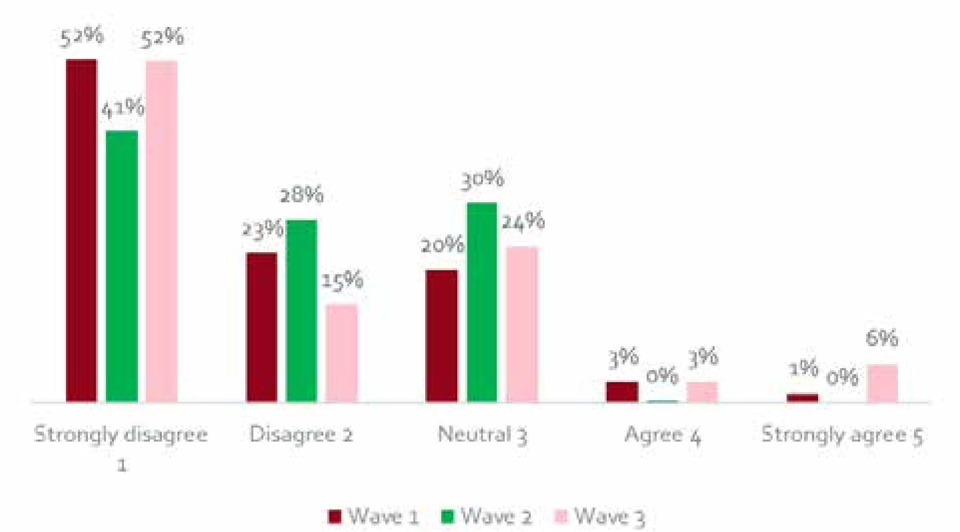


TABLE 147: RESPONDENTS' WILLINGNESS TO PAY FOR A SPONSORSHIP FOR ONLINE ARTS EVENTS/PRODUCTION SPLIT BY GENDER

	Female	Male
Strongly disagree	54%	55%
Disagree	12%	11%
Neutral	25%	23%
Agree	5%	5%
Strongly agree	5%	6%

TABLE 148: RESPONDENTS' WILLINGNESS TO PAY FOR A SPONSORSHIP FOR ONLINE ARTS EVENTS/PRODUCTION SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	47%	48%	52%	61%	69%	50%
Disagree	18%	16%	11%	8%	9%	9%
Neutral	23%	21%	24%	22%	18%	34%
Agree	6%	7%	4%	5%	2%	4%
Strongly agree	6%	9%	9%	4%	2%	3%

TABLE 149: RESPONDENTS' WILLINGNESS TO PAY FOR A SPONSORSHIP FOR ONLINE ARTS EVENTS/PRODUCTION SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	59%	68%	43%	35%	61%	54%
Disagree	6%	7%	7%	20%	21%	7%
Neutral	21%	9%	43%	35%	9%	38%
Agree	3%	5%	3%	7%	7%	0%
Strongly agree	12%	10%	4%	2%	2%	1%

TABLE 150: RESPONDENTS' WILLINGNESS TO PAY FOR A SPONSORSHIP FOR ONLINE ARTS EVENTS/PRODUCTION SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	60%	61%	52%	45%
Disagree	6%	10%	11%	15%
Neutral	34%	22%	27%	23%
Agree	0%	2%	4%	10%
Strongly agree	0%	5%	6%	7%

3.6.5 FOREIGN VS LOCAL

Performance

Another aspect that was analysed related to whether individuals were more inclined to pay for a foreign performance as opposed to a local one. Overall, this does not seem to be the case with Wave 3 results evidencing that 10% of respondents noted being more inclined to pay for an international performance than a local one, this being the highest percentage across the three waves of surveys.

FIGURE 20: YOU ARE MORE INCLINED TO PAY FOR AN INTERNATIONAL PERFORMANCE THAN A LOCAL ONE

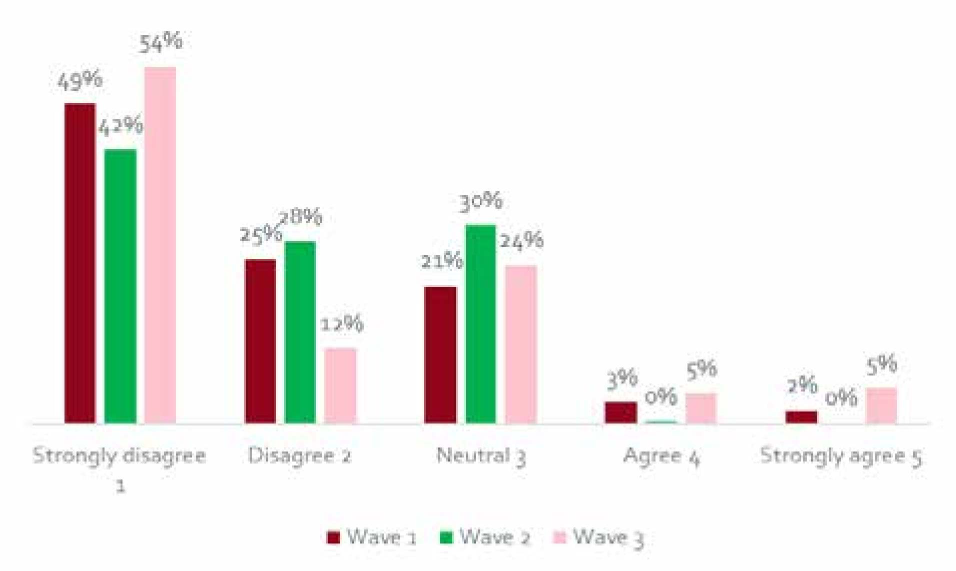


TABLE 151: RESPONDENTS' INCLINATION TO PAY FOR AN INTERNATIONAL PERFORMANCE MORE THAN FOR A LOCAL ONE SPLIT BY GENDER

	Female	Male
Strongly disagree	53%	50%
Disagree	9%	14%
Neutral	30%	30%
Agree	2%	3%
Strongly agree	5%	3%

TABLE 152: RESPONDENTS' INCLINATION TO PAY FOR AN INTERNATIONAL PERFORMANCE MORE THAN FOR A LOCAL ONE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	40%	51%	54%	53%	66%	44%
Disagree	18%	14%	12%	11%	8%	9%
Neutral	27%	29%	27%	31%	20%	42%
Agree	3%	2%	4%	3%	1%	1%
Strongly agree	11%	3%	2%	3%	4%	4%

TABLE 153: RESPONDENTS' INCLINATION TO PAY FOR AN INTERNATIONAL PERFORMANCE MORE THAN FOR A LOCAL ONE SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	56%	64%	44%	31%	66%	41%
Disagree	3%	11%	11%	19%	14%	5%
Neutral	33%	14%	39%	44%	18%	49%
Agree	3%	2%	0%	6%	2%	1%
Strongly agree	6%	9%	6%	1%	0%	4%

TABLE 154: RESPONDENTS' INCLINATION TO PAY FOR AN INTERNATIONAL PERFORMANCE MORE THAN FOR A LOCAL ONE SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	51%	55%	50%	47%
Disagree	3%	11%	13%	13%
Neutral	46%	29%	28%	32%
Agree	0%	2%	3%	3%
Strongly agree	0%	3%	5%	6%

Website

Similarly, the study sought to determine whether respondents made a distinction between paying for an event on a local or foreign website. The findings indicate that whether the website was foreign or local did not really matter in respondents' minds, when it came to determining their inclination to pay for a performance.

FIGURE 21: RESPONDENTS' INCLINATION TO PAY FOR A PERFORMANCE ON A FOREIGN WEBSITE RATHER THAN ON A LOCAL ONE

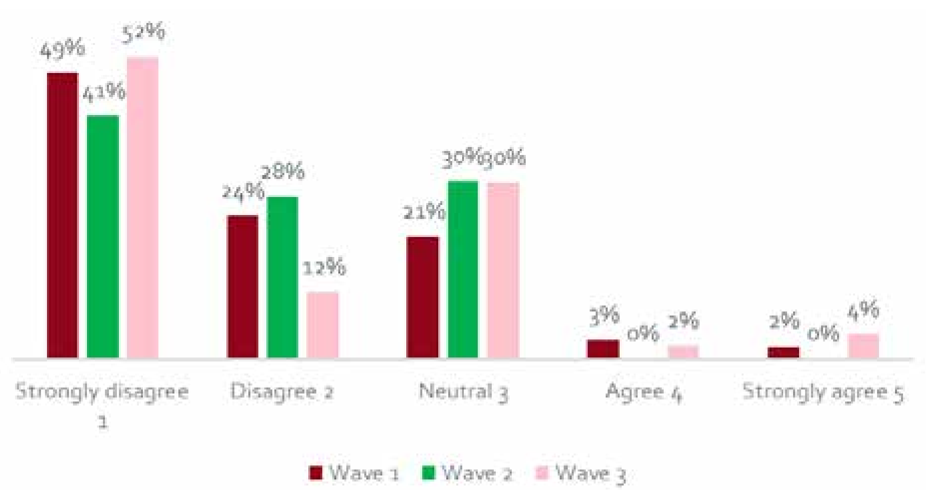


TABLE 155: RESPONDENTS' INCLINATION TO PAY FOR A PERFORMANCE ON A FOREIGN WEBSITE MORE THAN A LOCAL ONE SPLIT BY GENDER

	Female	Male
Strongly disagree	56%	53%
Disagree	10%	13%
Neutral	28%	30%
Agree	2%	2%
Strongly agree	5%	3%

TABLE 156: RESPONDENTS' INCLINATION TO PAY FOR A PERFORMANCE ON A FOREIGN WEBSITE MORE THAN A LOCAL ONE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	45%	53%	57%	55%	67%	47%
Disagree	19%	16%	10%	11%	8%	6%
Neutral	21%	26%	28%	28%	20%	43%
Agree	5%	2%	2%	3%	0%	0%
Strongly agree	10%	2%	3%	3%	4%	4%

TABLE 157: RESPONDENTS' INCLINATION TO PAY FOR A PERFORMANCE ON A FOREIGN WEBSITE MORE THAN A LOCAL ONE SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	65%	66%	44%	32%	70%	45%
Disagree	3%	11%	11%	20%	11%	5%
Neutral	32%	13%	39%	44%	18%	43%
Agree	0%	2%		5%	1%	1%
Strongly agree	0%	8%	6%	0%	0%	5%

TABLE 158: RESPONDENTS' INCLINATION TO PAY FOR A PERFORMANCE ON A FOREIGN WEBSITE MORE THAN A LOCAL ONE SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	51%	57%	53%	50%
Disagree	3%	10%	13%	13%
Neutral	46%	28%	25%	30%
Agree	0%	1%	4%	1%
Strongly agree	0%	4%	5%	5%

3.6.6 WILLINGNESS TO PAY

Overall, respondents noted that they were not keen of the idea of paying for online content. Furthermore, the research evidences that such lack of willingness to pay for online content was consistent throughout the three surveys.

FIGURE 22: RESPONDENTS' WILLINGNESS TO PAY FOR ONLINE CONTENT

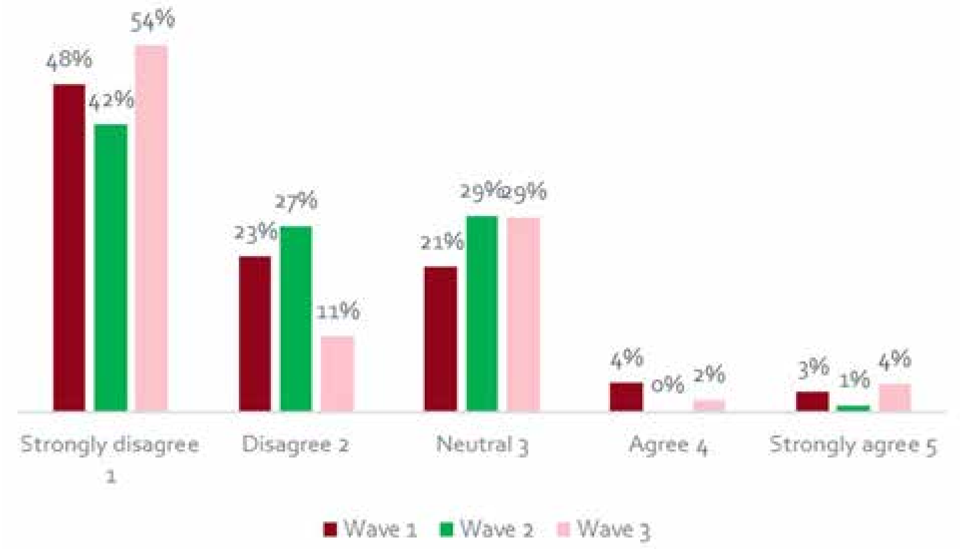


TABLE 159: RESPONDENTS' WILLINGNESS TO PAY FOR ONLINE CONTENT SPLIT BY GENDER

	Female	Male
Strongly disagree	45%	49%
Disagree	9%	11%
Neutral	32%	29%
Agree	4%	4%
Strongly agree	10%	6%

TABLE 160: RESPONDENTS' WILLINGNESS TO PAY FOR ONLINE CONTENT SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	40%	34%	49%	53%	66%	42%
Disagree	19%	14%	7%	7%	8%	8%
Neutral	34%	27%	30%	34%	13%	42%
Agree	5%	11%	3%	4%	2%	0%
Strongly agree	2%	14%	11%	3%	10%	7%

TABLE 161: RESPONDENTS' WILLINGNESS TO PAY FOR ONLINE CONTENT SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	56%	61%	39%	28%	59%	34%
Disagree	9%	10%	6%	14%	10%	11%
Neutral	26%	14%	44%	44%	22%	43%
Agree	3%	4%	3%	7%	3%	3%
Strongly agree	6%	11%	8%	7%	6%	9%

TABLE 162: RESPONDENTS' WILLINGNESS TO PAY FOR ONLINE CONTENT SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	51%	54%	39%	0%
Disagree	3%	11%	13%	8%
Neutral	40%	27%	33%	33%
Agree	0%	1%	6%	7%
Strongly agree	6%	8%	8%	9%

3.7 The Impact of COVID-19

The pandemic has adversely affected the arts and culture sector with certain measures making productions difficult.

3.7.1 PAY FOR PREVIOUSLY FREE CONTENT

In view of how the industry has been adversely affected, respondents were asked to indicate their inclination to pay for online content that was previously free of charge.

In wave 3 a total of 44% of respondents noted that they would be willing to pay for events that were previously free. Of these 27% agreed to the statement and another 17% strongly agreed. In Wave 1, a total of 34% were favourable to payment with such percentage decreasing marginally in Wave 2 to 30%.

FIGURE 23: RESPONDENTS' WILLINGNESS TO PAY FOR EVENTS THAT WERE PREVIOUSLY FREE

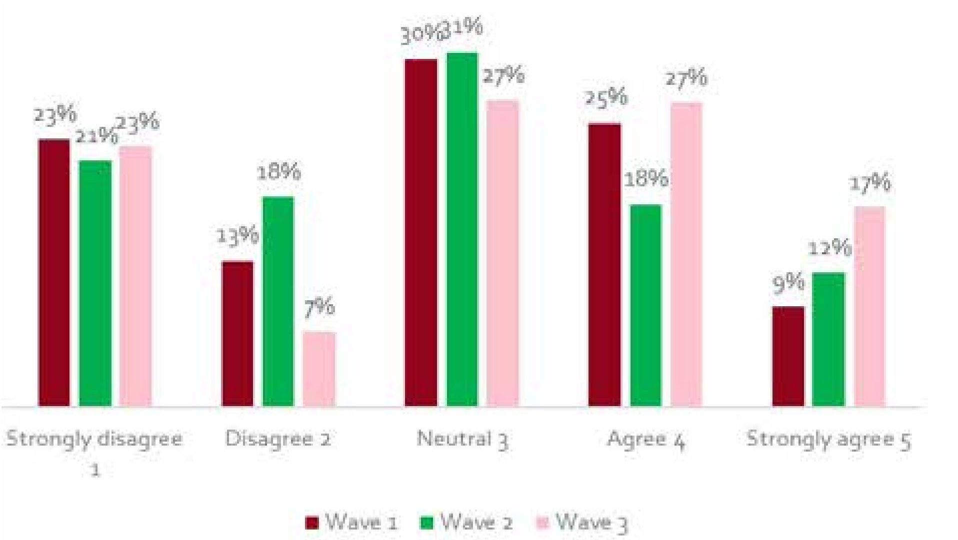


TABLE 163: RESPONDENTS' WILLINGNESS TO PAY FOR EVENTS THAT WERE PREVIOUSLY FREE SPLIT BY GENDER

	Female	Male
Strongly disagree	22%	23%
Disagree	5%	8%
Neutral	26%	28%
Agree	28%	25%
Strongly agree	19%	16%

TABLE 164: RESPONDENTS' WILLINGNESS TO PAY FOR EVENTS THAT WERE PREVIOUSLY FREE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	19%	20%	26%	15%	27%	26%
Disagree	11%	10%	7%	4%	4%	5%
Neutral	26%	23%	24%	32%	20%	35%
Agree	32%	28%	21%	30%	35%	18%
Strongly agree	11%	20%	23%	19%	13%	16%

TABLE 165: RESPONDENTS' WILLINGNESS TO PAY FOR EVENTS THAT WERE PREVIOUSLY FREE SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	29%	30%	21%	13%	28%	19%
Disagree	6%	7%	6%	4%	10%	5%
Neutral	21%	19%	28%	36%	18%	43%
Agree	21%	22%	30%	38%	28%	20%
Strongly agree	24%	22%	15%	9%	16%	12%

TABLE 166: RESPONDENTS' WILLINGNESS TO PAY FOR EVENTS THAT WERE PREVIOUSLY FREE SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	29%	27%	24%	11%
Disagree	3%	8%	6%	6%
Neutral	31%	25%	32%	25%
Agree	23%	24%	25%	34%
Strongly agree	14%	17%	13%	23%

3.7.2 PAY A MARGINALLY HIGHER PRICE

One fourth of those interviewed strongly disagreed with the notion of having to pay a higher price to, in some way, assist the arts and culture sector deal with the adverse impacts caused by COVID-19.

Conversely, 37% were willing to pay a price (up to 10% higher) than the normal average price to attend an arts/cultural event, with 24% indicating that they agreed while 13% indicated that they strongly agreed with this idea.

FIGURE 24: RESPONDENTS' WILLINGNESS TO PAY A HIGHER PRICE (UP TO 10%) THAN THE NORMAL AVERAGE PRICE TO GO TO AN ARTS/ CULTURAL EVENT

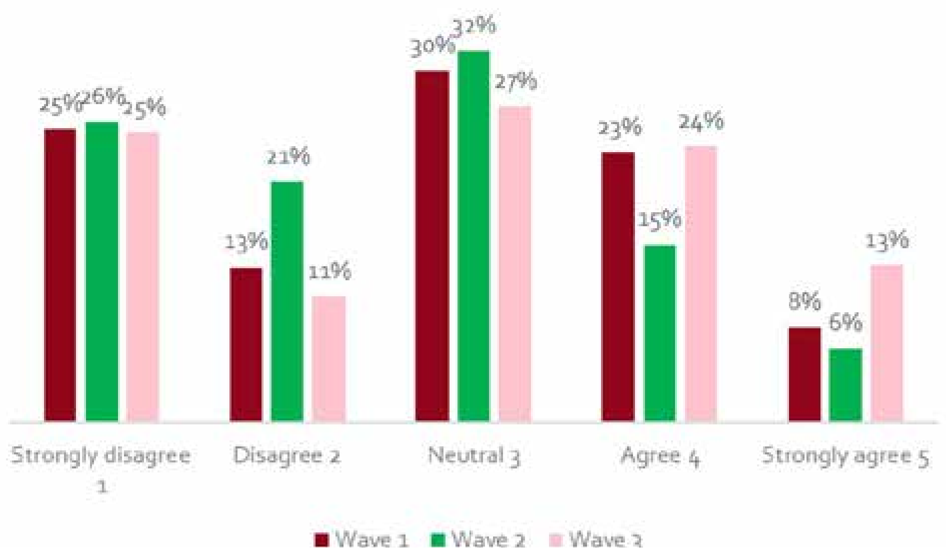


TABLE 167: RESPONDENTS' WILLINGNESS TO PAY A HIGHER PRICE (UP TO 10%) THAN THE NORMAL AVERAGE PRICE TO GO TO AN ARTS/ CULTURAL EVENT SPLIT BY GENDER

	Female	Male
Strongly disagree	24%	25%
Disagree	9%	12%
Neutral	28%	26%
Agree	24%	23%
Strongly agree	14%	13%

TABLE 168: RESPONDENTS' WILLINGNESS TO PAY A HIGHER PRICE (UP TO 10%) THAN THE NORMAL AVERAGE PRICE TO GO TO AN ARTS/ CULTURAL EVENT SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	18%	16%	33%	22%	31%	26%
Disagree	15%	11%	11%	11%	11%	8%
Neutral	24%	25%	21%	20%	29%	39%
Agree	31%	34%	16%	34%	20%	14%
Strongly agree	13%	14%	20%	14%	8%	13%

TABLE 169: RESPONDENTS' WILLINGNESS TO PAY A HIGHER PRICE (UP TO 10%) THAN THE NORMAL AVERAGE PRICE TO GO TO AN ARTS/CULTURAL EVENT SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	26%	34%	18%	16%	26%	22%
Disagree	6%	12%	9%	5%	16%	14%
Neutral	38%	20%	21%	33%	26%	38%
Agree	12%	14%	35%	38%	24%	19%
Strongly agree	18%	19%	17%	8%	9%	8%

TABLE 170: RESPONDENTS' WILLINGNESS TO PAY A HIGHER PRICE (UP TO 10%) THAN THE NORMAL AVERAGE PRICE TO GO TO AN ARTS/ CULTURAL EVENT SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	31%	32%	24%	11%
Disagree	6%	13%	13%	7%
Neutral	40%	29%	22%	28%
Agree	9%	16%	30%	33%
Strongly agree	14%	10%	12%	21%

3.7.3 ONE-TIME DONATION

Another aspect tackled related to individuals' inclination to give a one-time donation.

With a total of 59% responses (wave 3), interviewees noted that overall, they would be willing to give a one-time donation. Conversely, 20% of respondents did not warm up to this idea.

FIGURE 25: RESPONDENTS' WILLINGNESS TO GIVE A ONE-TIME DONATION

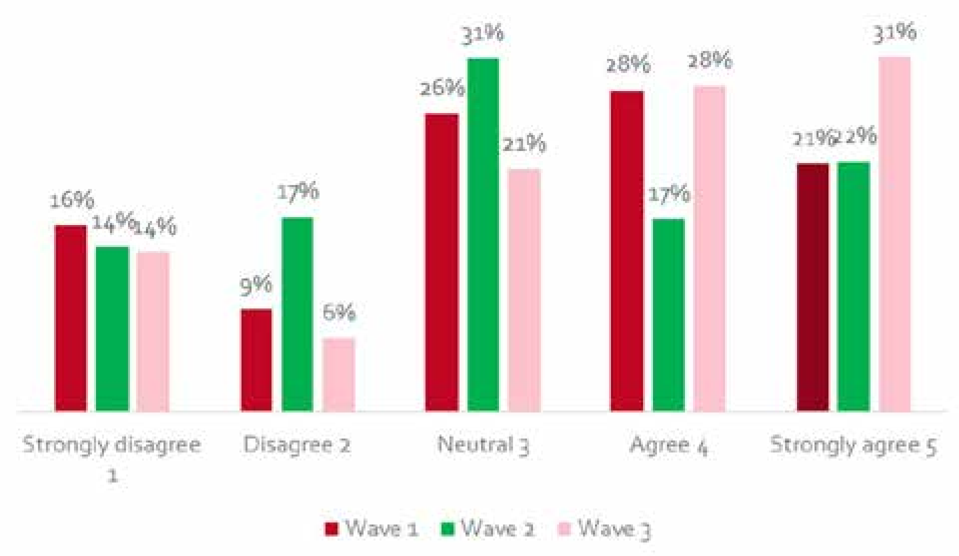


TABLE 171: RESPONDENTS' WILLINGNESS TO GIVE A ONE-TIME DONATION SPLIT BY GENDER

	Female	Male
Strongly disagree	12%	15%
Disagree	7%	6%
Neutral	20%	23%
Agree	30%	26%
Strongly agree	31%	30%

TABLE 172: RESPONDENTS' WILLINGNESS TO GIVE A ONE-TIME DONATION SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	13%	4%	13%	14%	20%	18%
Disagree	3%	7%	4%	7%	9%	7%
Neutral	27%	23%	16%	11%	15%	32%
Agree	31%	32%	28%	41%	21%	21%
Strongly agree	26%	35%	38%	28%	35%	22%

TABLE 173: RESPONDENTS' WILLINGNESS TO GIVE A ONE-TIME DONATION SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	18%	16%	10%	12%	17%	12%
Disagree	6%	7%	7%	5%	9%	3%
Neutral	24%	11%	25%	27%	11%	41%
Agree	12%	25%	26%	40%	30%	28%
Strongly agree	41%	41%	33%	16%	33%	16%

TABLE 174: RESPONDENTS' WILLINGNESS TO GIVE A ONE-TIME DONATION SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	23%	16%	14%	5%
Disagree	6%	9%	6%	3%
Neutral	26%	24%	20%	17%
Agree	20%	21%	34%	37%
Strongly agree	26%	29%	26%	39%

3.7.4 MEMBERSHIP

Two aspects were analysed here - individuals' willingness to assist:

1. Local artists and
2. Local organisations host international artists.

Assist local artists

In Wave 3 a total of 23% of respondents were favourable and noted their willingness to join an organisation's membership scheme (e.g. through a yearly subscription fee) to assist local artists. Such figure being the highest for the three waves (13% in Wave 1 and 16% in Wave 2).

FIGURE 26: RESPONDENTS' WILLINGNESS TO JOIN AN ORGANISATION'S MEMBERSHIP SCHEME (E.G. THROUGH A YEARLY SUBSCRIPTION FEE) TO ASSIST LOCAL ARTISTS

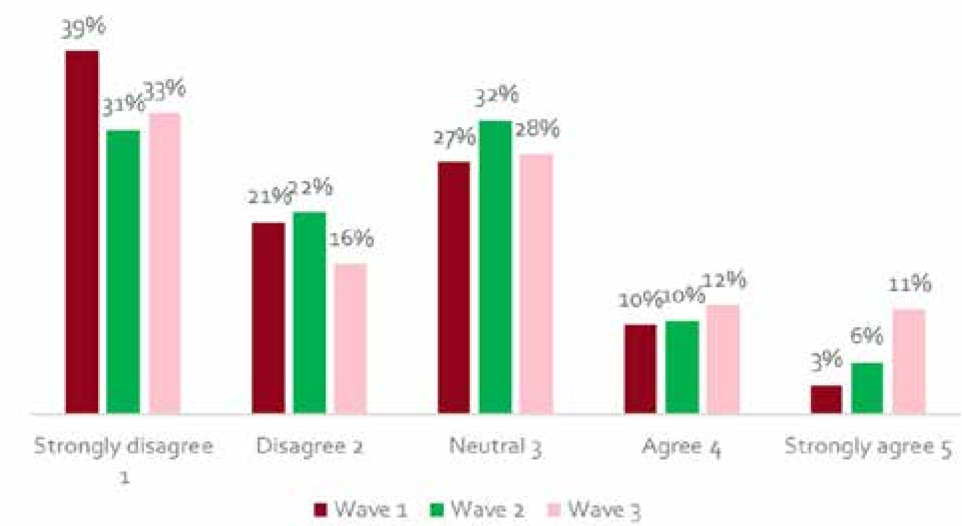


TABLE 175: RESPONDENTS' WILLINGNESS TO JOIN AN ORGANISATION'S MEMBERSHIP SCHEME (E.G. THROUGH A YEARLY SUBSCRIPTION FEE) TO ASSIST LOCAL ARTISTS SPLIT BY GENDER

	Female	Male
Strongly disagree	27%	38%
Disagree	17%	15%
Neutral	30%	26%
Agree	13%	10%
Strongly agree	12%	10%

TABLE 176: RESPONDENTS' WILLINGNESS TO JOIN AN ORGANISATION'S MEMBERSHIP SCHEME (E.G. THROUGH A YEARLY SUBSCRIPTION FEE) TO ASSIST LOCAL ARTISTS SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	23%	17%	37%	38%	40%	37%
Disagree	13%	28%	11%	18%	18%	10%
Neutral	35%	23%	23%	24%	22%	40%
Agree	15%	20%	12%	12%	7%	7%
Strongly agree	15%	12%	17%	8%	12%	5%

TABLE 177: RESPONDENTS' WILLINGNESS TO JOIN AN ORGANISATION'S MEMBERSHIP SCHEME (E.G. THROUGH A YEARLY SUBSCRIPTION FEE) TO ASSIST LOCAL ARTISTS SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	47%	41%	22%	26%	37%	23%
Disagree	15%	16%	10%	18%	21%	18%
Neutral	15%	16%	42%	38%	19%	43%
Agree	9%	9%	15%	12%	16%	9%
Strongly agree	15%	18%	11%	7%	7%	7%

TABLE 178: RESPONDENTS' WILLINGNESS TO JOIN AN ORGANISATION'S MEMBERSHIP SCHEME (E.G. THROUGH A YEARLY SUBSCRIPTION FEE) TO ASSIST LOCAL ARTISTS SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	43%	42%	29%	17%
Disagree	9%	15%	16%	18%
Neutral	40%	26%	29%	29%
Agree	3%	9%	12%	19%
Strongly agree	6%	8%	13%	17%

Assist local organisations host international artists

When asked whether they would be willing to become a member (through a yearly subscription fee) to assist local organisations host international artists, 18% of Wave 3 respondents answered positively. The research shows that the positive replies increased marginally from one wave to the next.

Furthermore, respondents were marginally more favourable to assist local artists than to assist local organisations host international artists.

FIGURE 27: RESPONDENTS' WILLINGNESS TO BECOME A MEMBER (THROUGH A YEARLY SUBSCRIPTION FEE) TO ASSIST LOCAL ORGANISATIONS HOST INTERNATIONAL ARTISTS

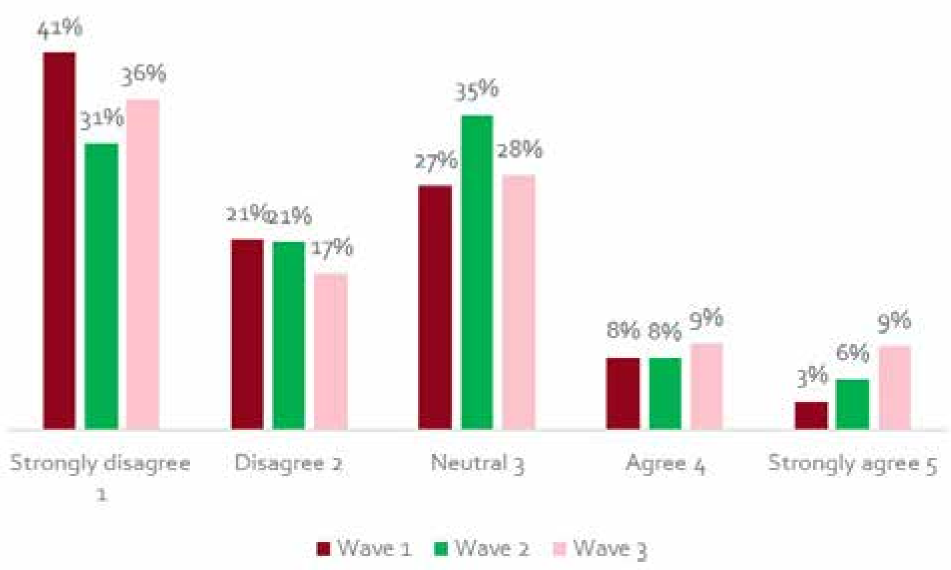


TABLE 179: RESPONDENTS' WILLINGNESS TO BECOME A MEMBER (THROUGH A YEARLY SUBSCRIPTION FEE) TO ASSIST LOCAL ORGANISATIONS HOST INTERNATIONAL ARTISTS SPLIT BY GENDER

	Female	Male
Strongly disagree	32%	40%
Disagree	18%	17%
Neutral	28%	28%
Agree	12%	7%
Strongly agree	10%	8%

TABLE 180: RESPONDENTS' WILLINGNESS TO BECOME A MEMBER (THROUGH A YEARLY SUBSCRIPTION FEE) TO ASSIST LOCAL ORGANISATIONS HOST INTERNATIONAL ARTISTS SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	24%	28%	36%	42%	40%	43%
Disagree	15%	24%	14%	19%	18%	14%
Neutral	35%	23%	27%	18%	25%	38%
Agree	13%	14%	10%	14%	6%	4%
Strongly agree	13%	11%	13%	8%	11%	2%

TABLE 181: RESPONDENTS' WILLINGNESS TO BECOME A MEMBER (THROUGH A YEARLY SUBSCRIPTION FEE) TO ASSIST LOCAL ORGANISATIONS HOST INTERNATION AL ARTISTS SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	56%	48%	25%	29%	37%	24%
Disagree	12%	18%	15%	12%	22%	20%
Neutral	15%	14%	39%	40%	19%	45%
Agree	6%	7%	10%	12%	15%	7%
Strongly agree	12%	13%	11%	7%	7%	4%

TABLE 182: RESPONDENTS' WILLINGNESS TO BECOME A MEMBER (THROUGH A YEARLY SUBSCRIPTION FEE) TO ASSIST LOCAL ORGANISATIONS HOST INTERNATIONAL ARTISTS SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	49%	45%	32%	23%
Disagree	14%	18%	13%	19%
Neutral	37%	26%	34%	26%
Agree	0%	6%	6%	19%
Strongly agree	0%	5%	15%	13%

3.7.5 VOUCHERS

The option of buying vouchers that would be redeemable for future programmes was viewed positively by 29% of respondents (Wave 3), with 12% indicating to agree to this statement and 17% strongly agreeing. One third of respondents expressed neutral views.

FIGURE 28: RESPONDENTS' WILLINGNESS TO BUY VOUCHERS THAT ARE REDEEMABLE FOR FUTURE PROGRAMMES

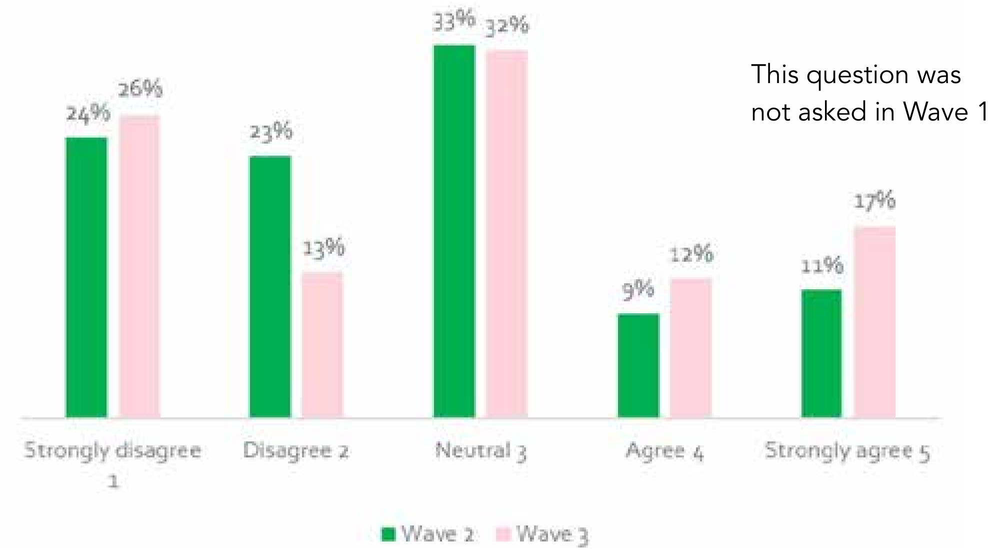


TABLE 183: RESPONDENTS' WILLINGNESS TO BUY VOUCHERS THAT ARE REDEEMABLE FOR FUTURE PROGRAMMES SPLIT BY GENDER

	Female	Male
Strongly disagree	24%	28%
Disagree	11%	14%
Neutral	32%	33%
Agree	14%	10%
Strongly agree	19%	15%

TABLE 184: RESPONDENTS' WILLINGNESS TO BUY VOUCHERS THAT ARE REDEEMABLE FOR FUTURE PROGRAMMES SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	15%	15%	26%	26%	33%	38%
Disagree	15%	16%	12%	15%	11%	9%
Neutral	40%	32%	30%	24%	22%	41%
Agree	19%	15%	12%	12%	16%	3%
Strongly agree	11%	22%	20%	23%	18%	8%

TABLE 185: RESPONDENTS' WILLINGNESS TO BUY VOUCHERS THAT ARE REDEEMABLE FOR FUTURE PROGRAMMES SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	32%	35%	19%	16%	33%	19%
Disagree	12%	11%	15%	13%	10%	18%
Neutral	26%	22%	42%	45%	19%	45%
Agree	9%	11%	8%	11%	22%	9%
Strongly agree	21%	21%	17%	15%	16%	9%

TABLE 186: RESPONDENTS' WILLINGNESS TO BUY VOUCHERS THAT ARE REDEEMABLE FOR FUTURE PROGRAMMES SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	40%	32%	27%	12%
Disagree	11%	15%	8%	14%
Neutral	34%	32%	33%	32%
Agree	3%	7%	15%	19%
Strongly agree	11%	14%	18%	23%

3.7.6 INCREASE ATTENDANCE

While half the respondents noted not to be willing to attend more local events that are organised in Wave 1, such figure decreased consistently from one research to the next, with those unwilling totalling 26% by Wave 3.

Conversely, 42% noted to be willing in Wave 3, this being the highest percentage throughout the project, with 17% agreeing and 25% totally agreeing with the statement.

FIGURE 29: RESPONDENTS' WILLINGNESS TO ATTEND MORE LOCAL EVENTS THAT ARE ORGANISED

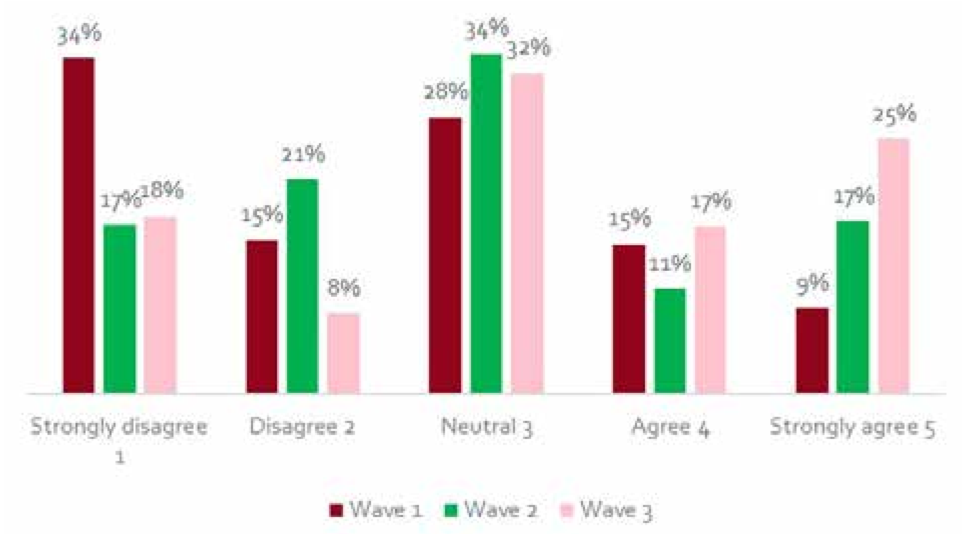


TABLE 187: RESPONDENTS' WILLINGNESS TO ATTEND MORE LOCAL EVENTS THAT ARE ORGANISED SPLIT BY GENDER

	Female	Male
Strongly disagree	14%	21%
Disagree	8%	9%
Neutral	30%	34%
Agree	19%	15%
Strongly agree	29%	22%

TABLE 188: RESPONDENTS' WILLINGNESS TO ATTEND MORE LOCAL EVENTS THAT ARE ORGANISED SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	6%	4%	14%	18%	26%	31%
Disagree	37%	5%	7%	8%	11%	10%
Neutral	18%	35%	27%	27%	21%	43%
Agree	31%	25%	16%	24%	13%	7%
Strongly agree	8%	30%	36%	23%	28%	9%

TABLE 189: RESPONDENTS' WILLINGNESS TO ATTEND MORE LOCAL EVENTS THAT ARE ORGANISED SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	35%	22%	16%	8%	22%	14%
Disagree	0%	8%	8%	11%	9%	8%
Neutral	26%	19%	42%	45%	24%	45%
Agree	12%	17%	11%	18%	22%	18%
Strongly agree	26%	34%	24%	19%	22%	16%

TABLE 190: RESPONDENTS' WILLINGNESS TO ATTEND MORE LOCAL EVENTS THAT ARE ORGANISED SPLIT BY EDUCATION LEVEL

	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	34%	24%	15%	4%
Disagree	9%	10%	8%	5%
Neutral	31%	34%	33%	31%
Agree	14%	13%	18%	22%
Strongly agree	11%	19%	26%	38%

3.8 Crowdfunding

Those that strongly oppose the idea of contributing to crowdfunding campaigns to assist organisations remain active has remained constant throughout the three waves of surveys with one in four indicating so.

The percentage of those that indicated a willingness to contribute fluctuated over the three surveys, reaching a high of 33% in Wave 1, decreasing to 15% in Wave 2 and averaging at 24% in Wave 3.

FIGURE 30: RESPONDENTS' WILLINGNESS TO CONTRIBUTE TO CROWDFUNDING CAMPAIGNS TO ASSIST ORGANISATIONS REMAIN ACTIVE

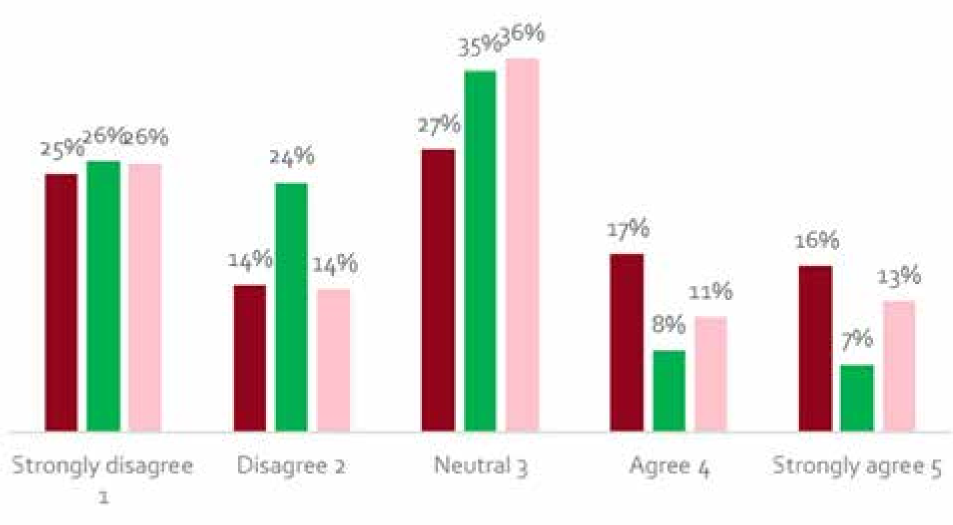


TABLE 191: RESPONDENTS' WILLINGNESS TO CONTRIBUTE TO CROWDFUNDING CAMPAIGNS TO ASSIST ORGANISATIONS REMAIN ACTIVE SPLIT BY AGE

	Female	Male
Strongly disagree	21%	31%
Disagree	13%	15%
Neutral	39%	34%
Agree	12%	11%
Strongly agree	15%	10%

TABLE 192: RESPONDENTS' WILLINGNESS TO CONTRIBUTE TO CROWDFUNDING CAMPAIGNS TO ASSIST ORGANISATIONS REMAIN ACTIVE SPLIT BY AGE

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
Strongly disagree	16%	15%	25%	24%	13%	35%
Disagree	21%	17%	17%	11%	29%	6%
Neutral	40%	38%	29%	34%	6%	45%
Agree	11%	11%	14%	22%	17%	6%
Strongly agree	11%	18%	14%	9%	35%	6%

TABLE 193: RESPONDENTS' WILLINGNESS TO CONTRIBUTE TO CROWDFUNDING CAMPAIGNS TO ASSIST ORGANISATIONS REMAIN ACTIVE SPLIT BY REGION

	Gozo	Norther Harbour	Northern Region	South Eastern	Southern Harbour	Western
Strongly disagree	32%	38%	20%	16%	24%	20%
Disagree	15%	14%	12%	14%	15%	15%
Neutral	26%	21%	47%	52%	33%	45%
Agree	15%	11%	9%	6%	15%	14%
Strongly agree	12%	16%	11%	12%	15%	7%

TABLE 194: RESPONDENTS' WILLINGNESS TO CONTRIBUTE TO CROWDFUNDING CAMPAIGNS TO ASSIST ORGANISATIONS REMAIN ACTIVE SPLIT BY EDUCATION LEVEL

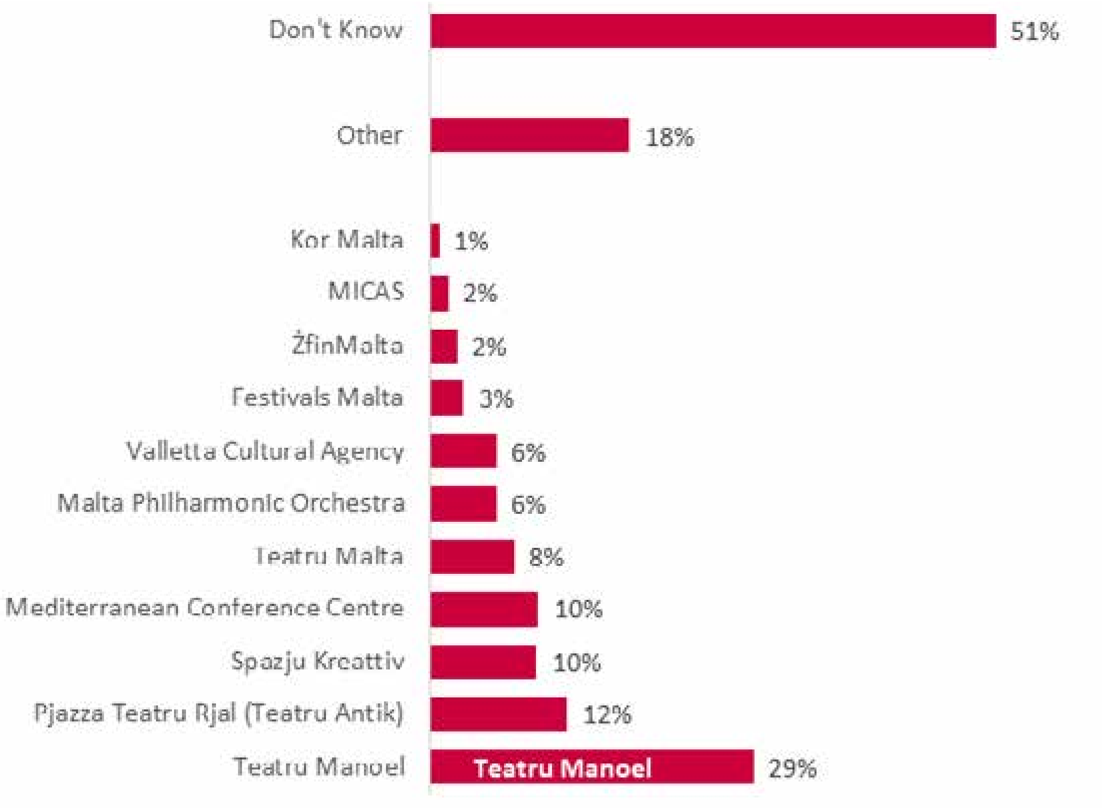
	Primary	Secondary	Post-secondary	Tertiary
Strongly disagree	24%	37%	33%	13%
Disagree	14%	6%	15%	13%
Neutral	35%	43%	35%	38%
Agree	12%	6%	7%	19%
Strongly agree	15%	9%	10%	16%

3.9 Awareness of Public Cultural Organisations

The final part of the survey sought to determine individuals' awareness of Public Cultural Organisations (PCOs). In this regard respondents were asked to mention a maximum of three (3) PCOs. Responses were not prompted.

With a score of 51%, the majority of respondents were unable to mention any PCO. Among top mentions, Teatru Manoel ranked first with a total of 29% mentions. 12% indicated Pjazza Teatru Rjal (though this was generally referred to using the phrase "Teatru Antik"). Among the 'other' category, 9% indicated Heritage Malta.

FIGURE 31: RESPONDENTS WERE ASKED TO NAME ANY 3 PUBLIC CULTURAL ORGANISATIONS (NOT PROMPTED)



4. Conclusions & Recommendations

4.1 Conclusions

4.1.1 ATTENDANCE

Prior to COVID-19 pandemic attendance to arts and culture events varied and was primarily dependent on the type of event. Visits to historical sites ranked first overall with 34% positive mentions. Of these, half indicated to have visited once. Visits to museums than followed with 31% positive mentions, with visit frequency in line with that of historical sites. 'Concert/live music performance/s' and 'Theatre performance/s' followed with 30% and 29% mentions respectively. Contemporary dance, ballet and other dance were the least attended with 6%, 5% and 4% responses respectively.

During lockdown, the number of people that shifted to online following was low. Of the various arts and culture possibilities under review, concerts and theatre were the most followed with 7% mentions each. Nonetheless, a noticeable percentage did indicate that it was likely for them to follow an event online in the future. Such percentage varied by the genre on offer, with 22% of respondents indicating to either currently follow theatre and concerts online or intend to do so in the future. Virtual museum followed with 17% followed by online historical sites (15%) and book event (13%). Lowest scoring related to ballet/contemporary dance/other dance (10% mentions each).

That said, when thinking about the future, the research shows that overall, individuals are not inclined to increase their likely participation in arts and cultural activities online when compared with the previous 12 months (prior to COVID-19). Furthermore, the longitudinal survey has evidenced that over time individuals felt less and less inclined to (attend online), with the number of individuals indicating so increasing with each survey. The 3rd and final survey notes that a total of 83% believed that their participation to arts and cultural activities online would decrease in the year/s to come. Conversely, 8% felt that it would increase.

With regards to in-person attendance following lockdown, the research shows that respondents have not yet commenced attending arts and cultural events with the same frequency that they did prior to lockdown, with all events under review attaining a score of 5% or less.

When seeking to determine respondents' likely future attendance, the longitudinal approach evidenced how peoples' inclination to attend an event increased over time. Such optimism also coincided with the launch and subsequent uptake of the vaccination. The data illustrates how the percentage of those opting to wait for a vaccination prior to attending an event decreased from one wave to the next (in line with the increase in vaccination uptake of the population). While people were overall very reluctant to attend an event during Wave 1 and Wave 2, in Wave

3 people felt more optimistic in their responses. By Wave 3 18% noted their likely in-person attendance to a museum over the coming three months, with the same percentage noting their likely attendance to a concert. Historical sites and theatre then followed with 17% mentions each. Other mentions being: Book-related event 14%, Art Gallery 13%, Cinema 9%, Ballet 8% and Contemporary/other dance performance - 7% mentions.

For there to be a surge in attendances, it is imperative that entities transmit peace of mind to their audience in terms of the health and safety measures being adopted at the venue. Indeed, notwithstanding the various options, COVID-19 related measures still topped the list of factors respondents felt entities ought to consider to instigate attendance these being: having a vaccine; and enforcement of COVID-19 restrictions.

4.2 Spend

With 55% mentions, the majority of responses noted not to have spent anything on arts and culture in the 12 months prior to COVID-19. A further 23% indicated to have spent less than €50. A marginally higher percentage of females spent on arts and culture overall than males. The youngest age cohort (18 to 24) had the highest percentage that indicated to have spent on arts and culture (62%) while the eldest age cohort (65 and over) were least likely (with 76% indicating not having spent anything).

Such propensity not to spend was further evidenced when arts and culture shifted online, with 91% noting not to have spent anything. Among those that did spend, the vast majority spent less than €50. In line with the above, females were marginally more inclined to spend on arts and culture online than their male counterparts.

Furthermore, when thinking about the future, those that indicated a willingness to participate online to arts and cultural activities were minimal (with the highest scoring being related to theatre/concert/live music performances (11%). A total of 7% indicated being willing to attend a virtual museum, 6% online historical sites and art gallery or similar, 5% cinema or other projected artistic performances, 4% are willing to follow ballet/contemporary dance/other dance/library archive online. Overall, in each instance, circa half of those that indicated a willingness to view online noted that they would be willing to pay for such online participation.

In line with the above, the research evidences that overall, respondents were not keen of the idea of paying for online content. Such lack of willingness to pay for online content was consistent throughout the three surveys.

The survey further evidenced that overall, respondents do not place more value on the international aspect (and thus be more willing to pay), be it with regards to performances or websites. That said, locals did appreciate the adverse effects COVID-19 had on the industry with 44% being willing to pay for events that were previously free. Furthermore, 37% indicated that they were willing to pay a higher price (up to 10%) than the normal average price to go to an arts/cultural event.

4.3 Funding opportunities

Overall, one fourth of respondents noted that they would be inclined to 'accept' give a donation every time they participated in an online event. In this regard, females are marginally more likely to accept such payment mechanism, as are those aged 25 to 54 and those that have completed tertiary education. Furthermore, with a total of 59% responses (wave 3), interviewees noted that overall, they would be willing to give a one-time donation.

One fifth of respondents indicated to be willing to pay-per-view for online events. Once again, females were more willing (than males) as were those aged 25 to 44. Furthermore, 37% of those that had completed tertiary education noted to be willing to this option too.

Promoting vouchers is another option worth considering (29% warmed up to this idea). These options were preferred to the possibility of a yearly subscription option. Those agreeing to a sponsorship were minimal.

Membership schemes could be a possibility, particularly to assist local artists (23% noted to be willing). That said, one would need to instigate audiences to act upon this.

4.4 Recommendations

4.4.1 STRENGTHENING RELATIONSHIPS, PARTNERSHIPS AND NETWORKS

Community

The desk research has evidenced that, internationally, a primary factor that has assisted arts and cultural organisations during the pandemic were the strong links such organisations have built with their communities, with the research noting how "*partnership working has been key to the success of agile and impactful responses from arts organisations in their communities - from developing stronger networks and new alliances with other creative or cultural organisations to maintaining and building connections with local organisations beyond the arts sector.*"[18] While it is still too early to determine, the potential of such endeavours could be far reaching, with the increase in value attained through such collaborations increasing the positive perception of such entities and subsequently funding opportunities (both public and private).

A renewed appreciation of local place has key implications for how arts organisations will work in those places. Rather than thinking of a culture in a place as a collection of institutions, arts organisations and individual artists alike are increasingly recognising that they sit within an 'ecology of culture' and by pooling knowledge, resources and funding, organisations – whether public, commercial or amateur - will have the opportunity to strengthen their collective value and resilience.

18 Caroline Macfarland, Matilda Agace & Chris Hayes. Creativity, Culture and Connection Responses from arts and culture organisations in the COVID-19 crisis.

Cross-sectoral partnerships

Local PCOs have a unique chance to make the case for the value of creative expertise beyond the cultural sector. These partnerships could be far reaching and could develop beyond community and social care, to such sectors as technology, sustainability, science, industry and more. The focus being on creating value of cultural connections within each sector.

Such cross-sector partnerships are deemed opportune in enabling local PCOs build both resilience and social purpose as they seek to recover from the current situation. Furthermore, and equally important, such endeavours could enable PCOs to tap into diversified, currently untapped, sources of funding. In the short to medium-term, leveraging the new collaborative models and delivery methods that have emerged during the crisis could help the arts and culture sector rebuild itself around relationships and reciprocity, so that it is 'more than the sum of its parts'[19].

Understanding and unlocking the power of the whole web of relationships that make an arts organisation thrive will be key to a creative, dynamic and equitable recovery. In addition to the interdependencies within cultural ecosystems, arts organisations and individual artists alike are increasingly recognising the crucial role they play within a community's social infrastructure. Pooling knowledge, resources and funding with other arts and non-arts organisations – whether public, charitable, commercial or voluntary – will strengthen cultural organisations' collective value and resilience in the COVID-19 recovery[20].

Healthcare

One adverse aspect of the COVID-19 crisis has been its toll on people's mental health and wellbeing[21] with the World Health Organisation (WHO) noting that such impact of the pandemic is forecasted to be "long-term and far-reaching"[22]. As a consequence, this is thus likely to transpose into a continued area of focus for public policy. Such a stance further reiterates how collaboration that is not strictly restricted to arts and culture entities - in this case with the healthcare industry - could be beneficial to both the arts and the health sector.

A number of studies[23] in recent years have evidenced that arts and creativity are crucial to personal well-being (and in certain instances have a positive impact on ones healing) and a way to express appreciation and connection with others. To this end, earlier this year (2021) WHO/Europe and the Nordic Culture Fun formed a new partnership project to explore effective and sustainable strategies for integrating arts and culture into the wider health-care sector. Similarly, in Australia the national arts and health framework was set up[24] (copy of such Framework attached to this report - Annex 1).

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19 Arts, Culture, and Economy: Where Are the Points of Leverage? Steve Dubb (March 2021)

20 Creativity, Culture and Connection. Responses from arts and culture organisations in the COVID-19 crisis. Caroline Macfarland, Matilda Agace & Chris Hayes.

21 Mental Health Foundation (2020) The COVID-19 pandemic, financial inequality and mental health, https://www.mentalhealth.org.uk/our-work/research/coronavirus-mental-health-pandemic/covid-19-inequality-briefing.

22 WHO warns of 'long term' COVID-19 impact on mental health - https://timesofmalta.com/articles/view/who-warns-of-long-term-covid-19-impact-on-mental-health.888436.

23 Heather L. Stuckey, DEd corresponding author and Jeremy Nobel, MD, MPH The Connection Between Art, Healing, and Public Health: A Review of Current Literature (2010)
Melanie Boyce BA, MSc, PhD, Hilary Bungay MA, PhD, Carol Munn-Giddings BA, MA, PhD, Ceri Wilson BSc, PhD. The impact of the arts in healthcare on patients and service users: A critical review (September 2017)
https://www.arts.qld.gov.au/images/documents/artsqld/Research/National-Arts-and-Health-Framework-May-2014.pdf

24 In 2013, the Standing Council on Health and the Meeting of Cultural Ministers endorsed the National Arts and Health Framework with Australia's Health Ministers and Cultural Ministers committed to improving the health and wellbeing of all Australians by recognising the role of the arts in contributing to this.

In the UK, these interventions have been recognised in cultural commissioning models which engage arts and culture organisations in public sector procurement of services to improve individual and community well-being, and through social prescribing whereby GPs and other primary care professionals make nonmedical referrals to community and creative activities[25].

Health and social services will inevitably undergo changes both in direct response to COVID-19, and as a result of its economic effects. Local authorities and health services will face a challenging combination of intensified demands and budget cuts. In this context, cultural inventions can play an important role in prevention, early intervention and reducing people's need for acute services. The foundations for the success of this work will be strong strategic links between health and social care providers, community leaders, and arts organisations who have already built-up trusted relationships in their communities and have experience of mental health and well-being provision.

Art and cultural entities need to be able to clearly articulate the soft, social and relational role of the arts in knitting together communities and inspiring hope.

Adapting and thinking it through

While opportunities exist, the arts and culture sector needs to be well geared to successfully tap into new opportunities as they arise. By way of example, the health sector is a complex system that requires specific training[26]. As indicated earlier, those entities that are able to adequately adapt to the 'new normal' and tap into new opportunities are the ones that will prosper.

Furthermore, while collaboration has its benefits, it is worth noting that there are potential pitfalls. Consequently, entities ought to think it through before embarking on any collaboration. In this regard, in her article - Can you do more together than alone[27] - the founder and Chief Executive of The Audience Agency, the UK national charity for public engagement with arts, museums and heritage identifies a self-evaluation checklist[28] organisations ought to consider prior to embarking on a collaboration, with particular focus on having a shared purpose, having clear goals/workplan and ensuring that collaboration enables the entity/ies to achieve more together than they would alone.

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25 National Council for Voluntary Organisations (2016) Cultural and commissioning models: Arts and culture on prescription model, https://www.ncvo.org.uk/images/documents/practical_support/public_services/cultural-commissioning/Art%20and%20culture%20on%20prescription%20010716v1.pdf

26 In the UK, the identification of this opportunity has led to Aesop Institute drawing up an accredited arts and health training course. *Aesop Institute is a continuing professional development programme for health and arts professionals with an interest in devising and running successful arts in health programmes. It is a collaboration between Aesop and Canterbury Christ Church University Faculty of Health and Wellbeing.*

27 https://www.theaudienceagency.org/resources/-can-you-do-more-together-than-alone

28 The complete checklist being: Are you and your stakeholders willing to put in more time than you think? Do you and your potential partners want the same things and share the same purpose? Do you all bring something different and required to the table? Is that a strong enough basis for trust? Can you campaign together? Are you ready to share data and learning? And – the acid test – can you achieve more together than alone?

Strengthening relationships, partnerships and networks

Points for consideration:

Increase collective value, resilience and social purpose by strengthening relationships and reciprocity by:

- Placing greater emphasis on building strong relationships with local community groups;
- Building networks and relationships with entities operating outside the immediate cultural sector, including those within fields such as technology, sustainability, science, industry and more, be they public, commercial or voluntary and in so doing combine knowledge, resources and funding.
- Forming new partnerships/projects to explore effective and sustainable strategies for integrating arts and culture into the wider health-care sector thereby maximising the potential presented by studies that clearly evidence that arts and creativity are crucial to personal well-being.

4.4.2 CO-CREATING

Over recent years, and all the more so during the pandemic, there has been a steadily growing movement within the arts and culture sector to move from traditional models of participation and outreach, where people are being invited to join in with the existing work of an artist or organisation – to co-create - where all participants in a project are active and equal partners from the outset. Co-creation methods may be applied/incorporated in a number of ways and indeed in all aspects of the business - be it in:

- Drawing up the organisation's values and core objectives,
- The operational aspect of the entity's activities,
- Decision-making processes,
- Programme delivery, and
- Marketing/promotional endeavours.

The move to co-creation is considerable and relies on placing power in the people. For it to succeed it is thus crucial that co-creation processes value diverse experiences, talent and knowledge, and have the right systems in place to be able to truly incorporate such a paradigm shift.

Embedding co-creation doesn't just mean changing the way which organisations design standalone programmes, but a more fundamental examination of how they work, and who they work with.

4.4.3 DIGITALISATION

The research has evidenced the importance of digitalisation and how online presence provides opportunities to tap larger audiences.

While on the one-hand younger generations are savvier in terms of working within the digital sphere, arts and cultural entities must keep in mind the various segments the online platform can reach, and that one cannot adopt a one size fits all approach. Different audience segments require different approaches. Furthermore, the older audiences are already a substantial proportion of the core audience of this industry, and thus their engagement should not be undermined.

> How you design the digital experience does need to vary by audience types. It was notable that although more younger audiences agreed than disagreed that they'd like to interact with others on social media, the opposite was the case for many older groups. Designing-in social responses may work much better for some than others (and therefore affect which channels are best to focus on for this purpose).
>
> Bounce Forward. Digital Engagement with Culture.
> Oliver Mantell, Katie Moffat, Meg Bradbury

Another consideration of the digitalisation relates to the offer. The desk research and interviews conducted has evidenced that in the immediate, following the outbreak of COVID-19, a number of local entities had sought their online platforms to stream recordings of past events. This is indeed just one aspect that ought to be considered. Indeed, one should not perceive digitalisation just as a substitute to the face-to-face performance, or as a replica, but rather, one ought to differentiate digital experiences from live ones and see digitalisation as an opportunity and take advantage of those aspects that digital is uniquely able to do. Rather than focusing on the technology per se, entities ought to understand how technology could be used to positively effect quality of the experience for the audience. Among the opportunities are the provision of individual customisation/interaction (whether changing the action, shifting viewpoint or presentation etc), blended media (e.g. mixing theatre with animation, making musical scores and/or interpretation visible for classical concerts, or having a director/conductor/curator's voiceover version)[29].

The report - Bounce Forward. Digital Engagement with Culture - that focuses on the arts and culture in the UK, though is also relevant for Malta, notes that any digitalisation strategy should give due importance to two pillars:

I. **The audience** — Here a distinction ought to be made (and consequently a different offer) for the different target audiences - with a premium easy-to-access, 'high-art' offer for an older, highly engaged audience and a blended-media, innovative, varied and social offer for a younger audience.

II. **The offering** — The platform offering should comprise:
   a. Recurring events that ensure that the customer is 'guaranteed there'll-be-something-on' events and
   b. One-off 'appointment viewing' for events. Here too the product package should comprise a mix of 'free-to-view' and viewings against payments.

29 Bounce Forward. Digital Engagement with Culture. Oliver Mantell, Katie Moffat, Meg Bradbury.

Understanding the target audience is key to ensuring a package offering that meets the audience's needs (and their willingness to pay). This aspect - understanding audience's willingness to pay is fundamental and seems to be directly linked to the audience's motivators to attend/view an arts or cultural event. Hence, understanding audience's instigating factors is key.

On the topic, international studies evidence that "*Shifting away from the abundance of free content, a laudable response in a global crisis, to a paid model will be a challenge. A perception has been created that digital culture is free to access – this will take some time to overcome*."[30]

Factors to consider when organising a virtual event

To make sure you're organising a virtual event that's accessible, think about the following:

- Does the platform you're using allow computer-based audio listening/speaking and phone-based audio listening/speaking?
- Have you factored in the costs of captioning, sign language interpretation, audio description or other accommodations into your budget?
- Have you prepared your speakers?
- Have you checked that the materials used are accessible also for streaming virtually? For example, text should be high-contrast and in a large, legible font.
- Will you be offering accessibility information ahead of time? This includes sharing the format of the event and how long it will take.
- Will you be allowing your attendees to provide feedback?

Accessibility is a learning process, but the efforts you make can have a huge impact on the people who are able to attend virtual events.

https://www.functioncentral.co.uk/health-safety-event-planning/inclusive-event-planning-after-covid-19.html

Consolidation of platforms/channels

With a number of entities faced with limited resources - both financial (with such a stance to be all the more an issue as a result of the pandemic and tighter funding opportunities) as well as in terms of content provision, it would seem apt for the consolidation of platforms/channels. Furthermore, it is not sufficient to have the right platform and content, one needs to invest (oftentimes substantially) to successfully promote such platform to the distinct audiences. Having specific channel/s aimed at differentiated audiences, with a range of organisations supplying content, is likely to be a more viable model, both for viewer attention, costs of delivery and pay-to-view or other models. By way of example, having a channel that focuses exclusive on children. Such a proposition seems to depend on the business model adopted by an organisation, though would seem particularly suited for those opting for a subscription based and/or memberships business model.

That said, one should not exclude third party channels as these may still be preferable approaches (e.g. Youtube, Facebook Live, Periscope etc).

30 David Reece, Deputy CEO Baker Richards.

Successful evaluations and learning

Rather than re-inventing the wheel, moving forward the success of entities will be for them to successfully evaluate what worked and what does not and to amend accordingly. Flexibility and fluidity are of importance here.

> An enlightened society through arts and culture leads to a culture of openness, innovation and creativity.
>
> National Cultural Policy 2021

Co-creation and digitalisation

- Embrace co-creation as a central principle within the development of the entity's cultural programme.
- Ensure that the right systems are in place to be able to truly incorporate such a paradigm shift.
- Focus efforts on building digital capacity.
- Undertake a concerted effort - through networking, partnerships and specialised workshops - to truly embrace digitalisation and understand how technology could be used to positively affect the quality of the experience for the audience, rather than as a substitute to the face-to-face performances.
- When drawing up a digital strategy stay away from a one-size-fits all approach. Have distinct approaches for the different audiences (by way of example: distinct plans of action dependent on audience age, IT savviness, propensity to attend arts and culture events etc.)
- In terms of sustainability build an audience database that enables you to truly understand each participant/attendee (with such information as: their attendance trends and preferences and the like). This will enable you to design a package offering that truly meets their needs and consequently their willingness to pay and in so doing help you improve customer retention, increase revenue and increase the value of each audience.
- Explore the possibility of joining forces and having a common platform/channel to better target specific audiences (by way of example - if 3 entities are seeking to target a specific audience segment, it might be worth considering having one platform where all the content for this target audience is readily available.

OECD Report Policy recommendations for cultural and creative sectors

With respect to policy, the OECD Report[31] notes the following medium- and long-term policy recommendations for cultural and creative sectors in light of COVID-19 and its consequences:

- Introduce measures for the recovery to help the self-employed and other small firms adapt to structural changes (e.g. shifts in consumer habits) and seize new opportunities, including digital tools
- Widen innovation strategies and policies to better account for the role of cultural and creative sectors
- Invest in digital infrastructure that can amplify advances in cultural and creative sectors
- Promote greater complementarities between culture and other policy sectors
- Education can benefit from advances in cultural and creative sectors, particularly in the use of new digital tools that build on gaming technologies and new forms of cultural content
- Health care and social services can benefit from greater linkages with cultural and creative sectors to improve well-being, prevent illness or delay its onset, favour the adoption of healthy habits, and prevent social isolation, among others
- Develop new local strategies for cultural tourism that address the socially and environmentally unsustainable practices of many large-scale or intensive tourism centres
- Use targeted cultural policies to address social issues such as intercultural dialogue or the integration and valorisation of minorities and migrants
- Support cultural and creative entrepreneurship as catalysts of new models of economic and social value creation

31 OECD Policy Responses to Coronavirus (COVID-19) Culture shock: COVID-19 and the cultural and creative sectors. (7 September 2020)

Annex 1 - Survey

We are currently conducting an extensive research exercise to better understand locals' attitudes and perceptions towards arts, and how these have altered as a result of COVID-19. As part of our endeavours to draw up a strategy that will ensure the sustainability of the industry, we would greatly appreciate were you to take a few minutes to complete the following survey.

The following questions will relate to the 12 months PRIOR TO COVID-19 (prior to MARCH 2020).

1. In the 12 months PRIOR to COVID-19 (prior to March 2020), how often have you attended (in person) any of the following - locally?

	Never	1 time	2 - 3 times	4 times or more	Don't Know
Theatre performance (drama, musical, comedy, pantomime or similar)					
Concert/ live music performance					
Ballet performance					
Contemporary dance performance					
Other dance performance					
Cinema or other projected artistic performance					
Attended an art gallery, exhibition, photographic exhibition, crafts, displays or similar					
Library/ archive					
Museum					
Historical site					
Other (please specify)					
None of the above/ did not attend					

2. On average, in the 12 months PRIOR to COVID-19 (prior to March 2020), how much did you spend on arts and culture (yearly spend):

Didn't spend anything	
Less than €50	
Between €50 and €100	
Between €101 and €150	
Between €151 and €200	
Between €201 and €250	
More than €250	
Don't know	

The following questions will relate to the time spent in partial lockdown (COVID-19 period MARCH 2020 – MAY 2020).

3. During the partial lockdown (COVID-19 period **March 2020 to May 2020**) did you follow any of the below events **ONLINE?** (tick all that apply)

	Yes - local website/social media platform for free	Yes - local website/social media platform paid per view	Yes - local website/social media platform and gave a donation	Yes - local website/social media platform through subscription	Yes - international website/social media platform for free	Yes - international website/social media platform and paid per view	Yes - international website/social media platform and gave a donation	Yes - international website/social media platform and made a subscription	No but would be interested in the future	Not sure	Not interested
Theatre performance (drama, musical, comedy, pantomime or similar)											
Concert/ music performance											
Ballet performance											
Contemporary dance performance											
Other dance performances											
Art gallery, exhibition, photographic exhibition, crafts, displays or similar											
Virtual Library/ archive											
Virtual Museum											
Historical site											
Other (please specify)											

4. How much did you spend during this period (on online events)?

Didn't spend anything	
Less than €50	
Between €50 and €100	
Between €101 and €150	
Between €151 and €200	
Between €201 and €250	
More than €250	
Don't know	

5. Once lockdown was eased and places started opening up (June 2020), which (if any) of the following have you attended in person?

	Attended within 1 month	Attended within 2 to 4 months	Did not attend
Live theatre performance (drama, musical, comedy, pantomime or similar)			
Concert/ live music performance			
Ballet performance			
Contemporary dance performance			
Other dance performances			
Cinema or other projected artistic performance			
Attended an art gallery, exhibition, photographic exhibition, crafts, displays or similar			
Library/ archive			
Museum			
Historical site			
Other (please specify)			

6. With the situation as is today, how likely are you to **attend in person,** to the following over the coming 12 months

	Likely to do so over the coming month	Likely to do so over the coming 2 to 3 months	Likely to do so over the coming 4 to 6 months	Likely but not within the next 6 months	Will wait for a vaccine	Not sure	Not interested
Live theatre performance (drama, musical, comedy, pantomime or similar)							
Concert/ live music performance							
Ballet performance							
Contemporary dance performance							
Other dance performances							
Cinema or other projected artistic performance							
Attended an art gallery, exhibition, photographic exhibition, crafts, displays or similar							
Library/ archive							
Museum							
Historical site							
Other (please specify)							

7. What are the key factors in your decision-making process that could instigate you to attend/ attend more often (in person) to an arts or cultural event (rank in order of importance the top 3 factors)? (do not prompt)

Enforcement of COVID-19 restrictions (masks, social distancing, hand sanitizers etc)	
Restricted audience sizes	
Clear seating plans	
Clear cancellation/ money back policies	
Decreasing infection rates	
Having a vaccine	
Have outdoor performances	

Ensure that the space is fumigated each time that a performance occurs.	
Stagger arrivals and departures where possible, to reduce congestion at points of entrance and exit and in common areas	
A foreign production	
A specific local production	
Easy parking	
Family friendly measures	
Affordable options	
Limited number of people per event	
Trusted organiser/ venue	
Other (please specify)	
Unsure	
Nothing	

8. Moving forward (in the year/s to come - with or without COVID), your participation to arts and cultural activities ONLINE when compared with the previous 12 months (prior to COVID-19) is likely to:

Increase	
Remain the same	
Decrease	

If increase/ remain the same: Which of the following events are you most inclined to follow online? Please specify if you would pay for such an event or not.

	For free	Ready to pay	Not interested
Theatre performance (drama, musical, comedy, pantomime or similar)			
Concert/ live music performance			
Ballet performance			
Contemporary dance performance			
Other dance performance			
Cinema or other projected artistic performance			
Attended an art gallery, exhibition, photographic exhibition, crafts, displays or similar			
Library/ archive			
Museum			
Historical site			
Other (please specify)			
None of the above/ did not attend			

9. To what extent do you agree/ disagree to the following statements that relate to online viewership of arts and culture- on a scale from 1 to 5, where a score of 1 indicates that you strongly disagree, while at the other end of the scale a score of 5 indicates that you strongly agree.

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
You are willing to give a donation every time you view an event online					
You are willing to pay per view for each event viewed online					
You are willing to pay for yearly subscription for online arts events/ productions					
You are willing to pay for a monthly subscription for online arts events/ productions					
You would be willing to sponsor an arts organisation or performance/ production					
You are more inclined to pay for an international performance than a local one					
You are more inclined to pay for a performance on a foreign website than a local one					
Other - please specify any other method you are willing to undertake to assist the arts					
You are not willing to pay for online content					

10. The arts industry has been adversely affected by COVID-19 with certain measures making productions difficult. Could you kindly indicate whether or not you agree to the following statements, where a score of 1 indicates that you strongly disagree, while at the other end a score of 5 indicates that you strongly agree with such statement.(Statements relate to assisting entities involved in the arts/ cultural industry to remain open while COVID-19 restrictions are in place).

	Strongly disagree	Disagree	Neutral	Slightly agree	Strongly agree
I would be willing to pay for events that were previously free	1	2	3	4	5
I would be willing to pay a higher price (up to 10%) than the normal average price to go to an arts/ cultural event	1	2	3	4	5
I would be willing to give a one-time donation	1	2	3	4	5
I would be willing to join an organisation's membership scheme (e.g. through a yearly subscription fee) to assist local artists	1	2	3	4	5
I would be willing to become a member (through a yearly subscription fee) to assist local organisations host international artists	1	2	3	4	5
I would be willing to buy vouchers that are redeemable for future programmes	1	2	3	4	5
I would be willing to attend more local events that are organised	1	2	3	4	5
I would be willing to contribute to crowdfunding campaigns to assist organisations remain active	1	2	3	4	5
I would be willing to use Government vouchers to purchases services or attend productions related to arts and culture.	1	2	3	4	5

Demographics

11. Gender

12. Male ☐ Other ☐

    Female ☐ Prefer not to say ☐

13. Age ____________________

14. Where do you currently reside (Location of residence) ____________________

15. Highest level of education attained

No schooling	
Pre-Primary	
Primary	
Special school for children with a disability	
Secondary	
Post-secondary/ Non-tertiary education	
Tertiary	

Any other comments you would like to make?

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Thank you for your input

AUDIENCE RESEARCH
A study of audience attitudes, perceptions, and behaviours

November 2021

A study commissioned by Arts Council Malta and carried out by EMCS Ltd.

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