

**A SURVEY OF THE IMPACT
OF COVID-19 ON THE
ATTENDANCE OF CULTURAL
EVENTS AND ALTERNATIVE
FORMS OF CULTURAL
ACTIVITIES IN SLOVENIA**

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ABSTRACT

The producers of cultural events were among the first to be affected by the extraordinary circumstances declared in March due to the emergence of the new coronavirus. With venues closed, live events could not be carried out or attended, and even now, the organisation of cultural events is uncertain and dependent on rules regarding public gathering, which change from week to week.

The online survey placed the visitors of cultural venues at the forefront. From 10 to 28 June 2020, the first such comprehensive survey in Slovenia was carried out, with the researchers aiming to recognise the key aspects of attending cultural events after the partial loosening of measures to restrict the spread of the COVID-19 virus. They were interested in which measures visitors are prepared to follow when attending events, which measures they wish the organizers to ensure, and their views on alternative (online) forms of cultural activities. The survey is based on the responses of 2207 participants.

The initial findings are encouraging:

1. CULTURAL EVENTS WERE MISSED

As many as 76.13 % of respondents missed or strongly missed attending cultural events during the period when cultural venues were closed. A negligible share (6.54 %) of respondents did not miss attending cultural events.

2. PRILOŽNOSTI NA SPLETU

During the epidemic, 63.7 % of respondents followed the online content of local cultural organisations occasionally, frequently or very frequently. Meanwhile, 43.43 % followed the online content of foreign cultural organisations occasionally, frequently or very frequently. Around 14 % of respondents viewed payable cultural content online occasionally, frequently or very frequently, which indicates potential for future development. Compared to before the epidemic, as many as 60.11 % of respondents increased how much they follow cultural content online during the epidemic. Only 8.18% of respondents are not following cultural content online; of those, 42.75 % stated that the offer of cultural content online during the epidemic did not appeal to them.

3. LIVE CULTURAL EVENTS ARE NOT REPLACEABLE BY ONLINE CONTENT

The majority of respondents would prefer to attend events live rather than online. As many as 87.95 % of respondents agree with the statement that cultural content online cannot replace

live events. A negligible share of respondents would prefer to attend cultural events online rather than live: only 1.97 % concerts, 2.61 % festivals, 2.42 % exhibitions, 2.64 % shows/stagings, etc. If venues were open during the epidemic and live attendance were possible, the majority of respondents would take advantage of that: 97.17 % would attend live concerts (this includes all who would prefer to attend events live, those who would attend them online only if live attendance were not possible, or those who would attend them both live and online), 96.08 % festivals, 95.74 % exhibitions, 95.17 % shows/stagings, 87.6 % performances... Only when it comes to roundtable discussions/conversations with creators is the share of those who would prefer to watch recordings of the discussions online larger (between 13 and 17.65 %).

4. THE PRICE OF CULTURAL CONTENT ONLINE

Of all the respondents, 33.15 % are prepared to pay for viewing an online stream of cultural content, 29.63 % are not prepared to pay, and 37.22 % are undecided. There is potential for recognising the key elements that would shift the undecided respondents during cultural venue lockdown into the group prepared to pay for viewing an online cultural event stream. Meanwhile, 77.83 % of respondents are prepared to pay more for live events than for their online streams, meaning that from an economical standpoint, live art cannot be replaced with online access. One tenth of all respondents think they would only follow online cultural content if it were free, while 11.76 % are prepared to pay the same price for both a live cultural event

and its online stream. No fewer than 77.29 % of respondents would pay 10–50 % less for a “ticket” for an online stream, meaning that at an online stream price of up to 50 % of the live event price, only 22.71 % attendees would be “lost”. These would pay for online cultural content if the price were between 60 and 90 % less than the live event ticket. When determining the price of online events, the important turning point is the price elasticity of the customers, which is at half the price of the live event ticket. As many as 36.05 % of respondents would pay half-price for an online stream, while 41.23 % of respondents would be prepared to pay more than 50 % (but less than the regular price). The cheaper offer (less than half-price for online events compared to live event prices) thus concerns only a little above one fifth of respondents, meaning that lowering online event prices below half of the live event ticket would not make much sense. On average, respondents would be prepared to pay 45.73 % less for online streams than for live events.

And what are the prices in an absolute sense? Concert streams online are among the most highly valued cultural events when it comes to prices. The most respondents (44.58 %) would pay 6–10 € to view an online concert, 31.14 % would pay 1–5 €, and 16.19 % would pay 11–15 €. Only when it comes to online streams of performing arts is the price elasticity curve more flexible or flatter – the share of those prepared to pay a higher price (compared to other arts) decreases more slowly: 53.98 % of respondents would pay 1–5 € for performing arts streams, 35.34 % would pay

6–10 €, and 8.75 % would pay 11–15 €. In all other arts, most respondents would pay the least for online streams, 1–5 €. As many as 84.53 % respondents would pay 1–5 € for film screenings online.

In case live event tickets increased by 10 % (compared to before the epidemic), 36.11 % of respondents could afford them, 33.96 % could afford a 20 % increase, and the share of those prepared to pay more starts dropping off with increasing prices after that. More respondents would be prepared to support ticket prices increasing due to safety measures than due to investments related to the online availability of events.

On average, respondents could afford around 21.70 % more for live events compared to before the epidemic. On average, due to attendance number restrictions in line with recommended distancing, they would pay 39.60 % more for live events compared to online events.

5. RETURNING TO CULTURAL VENUES

When asked when are they prepared to return to cultural events, a significant majority responded with immediately and without reservations in all categories (from the most, 88.60 %, for open-air theatre/performing arts to the least, 63.74 %, for workshops).

6. VIRUS FEARS

When asked how many are afraid of being infected with COVID-19, 61.98 % of respondents answered that not at all or that they are not afraid.

7. WHICH MEASURES DO VISITORS EXPECT

Respondents expect organizers to ensure a visitor-friendly environment (66.62 %), the possibility of booking tickets in advance (54.76 %), safe behaviour of all visitors (51.48 %), access to disinfectant (38.68 %), suitably marked and appropriately distanced standing and seating room (27.76 %).

The least important factors are: that event personnel wear masks (only 10.91 % of respondents selected this factor as important), that ticket prices would increase due to ensuring safety (only 9.78 % stated this factor as relevant), and that ticket prices would decrease due to the risk carried by live events (only 7 % view this aspect as relevant). There are statistically significant correlations between the level of fear and the attendance of events according to the event venue type. Respondents with a lower level of expressed fear of the virus would visit cinemas and indoor venues, while those with a higher level of expressed fear would visit open-air events. This statistical correlation speaks in favour of the decision to carry out open-air events during the epidemic, as people with more fear of the virus would attend them as well.

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