

# Kulturpuls Västra Götaland

Opportunities for deepening audience connection

October 2025 – Wave 1 insights



# Kulturpuls

**01 Introduction**

02 The audience journey

03 What's next



# Kulturpuls

This is the first wave of findings from a first-of-its kind audience development initiative centred around the Västra Götaland audience for culture.

It is sponsored by a collective of cultural organisations that vary significantly in scale and genre focus, but each share a commitment to audience development and peer-to-peer collaboration.

The insights are extracted from a robust survey of 1500 audience members that was fielded in April and May 2025.

The ultimate intention is not simply to report data, but to provide deep insights into all audiences - especially those that don't attend - to help drive creativity, inspire innovation and build resilience across the sector.

## **With thanks to the project partners**

Bohusläns museum, Film i Väst, Folkteatern, GöteborgsOperan, Göteborgs Symfoniker, Kulturhuset Fregatten, Västergötland museum, Kulturförvaltningen Västra Götalandsregionen, Lödöse och Vitlycke museum, Haga bion, Alingsås museum, Vara konserthus, Textilmuseet

# Data to inspire confidence

The insights are drawn from a large survey that is representative of the regional census on age, gender and educational attainment.

In order to screen in, audiences had to have engaged in, or be interested in engaging in, a long-list of 15+ culture and leisure pursuits, meaning that we captured both active and disengaged audiences. This is equivalent to 97% of the population.

There is also an analysable sub-sample of audiences born outside of Sweden, which is rare for a study of this type.



The Culture Segment questions were built into the study, which means all questions can be analysed using this system – providing a unique depth of insight on how audiences think and feel.

1504

Regional audience members in market for culture



524

From Gothenburg

980

From other municipalities



744

Male

753

Female



985

No degree

511

Degree holder



271

Under 30

340

30-40

378

40-55

259

55-65

256

65+

# Kulturpuls

01 Introduction

**02 The audience journey**

03 What's next



# The audience engagement journey

Survey insights have been used to map the 'audience engagement journey'. This is the route that all audiences follow from initial awareness through to advocacy. It's based on a classic brand funnel. Currently, this journey is not plain sailing. We've found a number of friction points at each stage that make it harder than it should be for audiences to discover, decide, select, engage and support.

Addressing these friction points is the key to deeper audience connection. We've made some practical suggestions for smoothing the journey that can be applied by individual institutions, more effective bi-lateral partnership or through enhanced regional collaboration and co-ordination.

[Read on to begin the journey.](#)



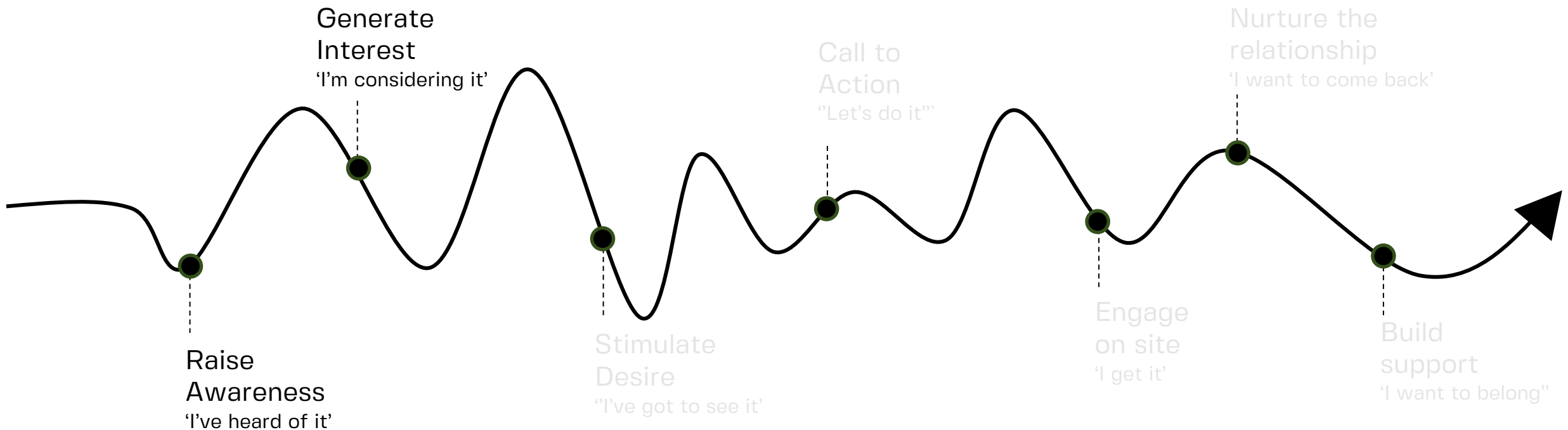
**The current journey has lot's of friction**



**The ideal journey smooth and easy**

# Getting seen and generating interest

The first step to building deeper relationships is being seen — and for many institutions, that’s the biggest hurdle. The data is clear: even well-established venues struggle with visibility beyond their core audiences. It’s not just about being relevant, but being discoverable — showing up where non-attenders are already looking. And once you’re there, it’s about standing out with assets that feels human, distinctive, and impossible to ignore. Now more than ever, creative, bold and emotionally affecting communications are needed to cut through the noise.



*“[Venue] needs to be more visible on social media. I just don't think about them. Bring something interesting. Something fun”*

# Friction points

## We have an awareness problem

- The reality is, we are on the edge of audiences' lives – even those closest to us don't think about us deeply or often
- The study shows that levels of unawareness of partner venues even within a 30 minute drive time ranged from 20% to 50%+
- The default marketing solution is to push the same messages out via the same channels. But this won't work if we want to grow – it will only deliver the same results and the same people

## We don't make it easy to discover

- Regional audiences aren't sure where to look for culture - fewer than 1 in 5 find it easy to stay on top of what's on
- They feel cultural organisations need to communicate more and better - meet them where they are
- To give one example, 65% of 16-19 year olds on social media use TikTok to find out about culture but many institutions still prioritise existing mail lists or Meta
- The data shows that potential visitors to our venues are already attending other cultural spaces – yet we're not fully leveraging this overlap. Despite shared goals, we're falling short when it comes to meaningful collaboration and cross-promotion

## We need to build real human connection

- Audiences are bombarded with ads and information but personal recommendation still has the biggest influence on driving interest in culture
- The influence of social media influencers is waning and trust is eroding. Data shows that audiences are increasingly sceptical of influencer content, often perceiving it as inauthentic or commercially driven. At the same time, unpredictable changes to Meta's algorithms are making it harder to reach people reliably
- In this context a 'genuine and authentic' voice is the main characteristic sought from venue communications – talking in a way that feels human and true to you

Only 16% feel it is 'very easy' to stay on top of what's on in the region. We need to make it easier to discover.

# Young people focus



C: Aflo images

Young people are overwhelmingly favouring TikTok to get their cultural what's on info – institutions will need to upskill and meet them there, whilst at the same time not neglecting more traditional forms such as personal recommendation and OOH which remain powerful.

**How do you find out what's on culturally in the region (16-19 year olds)?**

Social media 43%

Personal recommendation 41%

Posters and billboards 36%



**Which social media?**



64%



51%



47%

# Opportunities

## Individually we could...

- Be more fearless and creative with communications in order to stand out
- Commit to long-term brand focused campaigns to increase brand recognition
- Use storytelling that connects emotionally, not just promotional content
- Market on channels where non attending audiences actually are
- Produce bite-sized, authentic content (behind-the-scenes, staff stories)
- Use a genuine, human-first tone — casual, imperfect, and relatable

## As partners we could...

- Collaborate with partner venues on joint campaigns and seasonal themes
- Cross-promote other venues' events at point of sale and on social media
- Share audience data compliantly to create co-branded newsletters and targeted messaging
- Use real audience members (not influencers) for authentic venue-hopping content

## As a regional group we could...

- Build the ultimate regional “What’s On” guide with curated design that drives discover and exploration
- Create a region-wide newsletter or alerts system tailored to audience interests
- Explore shared CRM or data cooperation tools for richer audience insights
- Partner with local non-cultural organizations (commercial companies, transport, schools) to broaden reach
- Run region-wide awareness campaigns across diverse channels

Raise awareness

Generate interest

Stimulate desire

Call to action

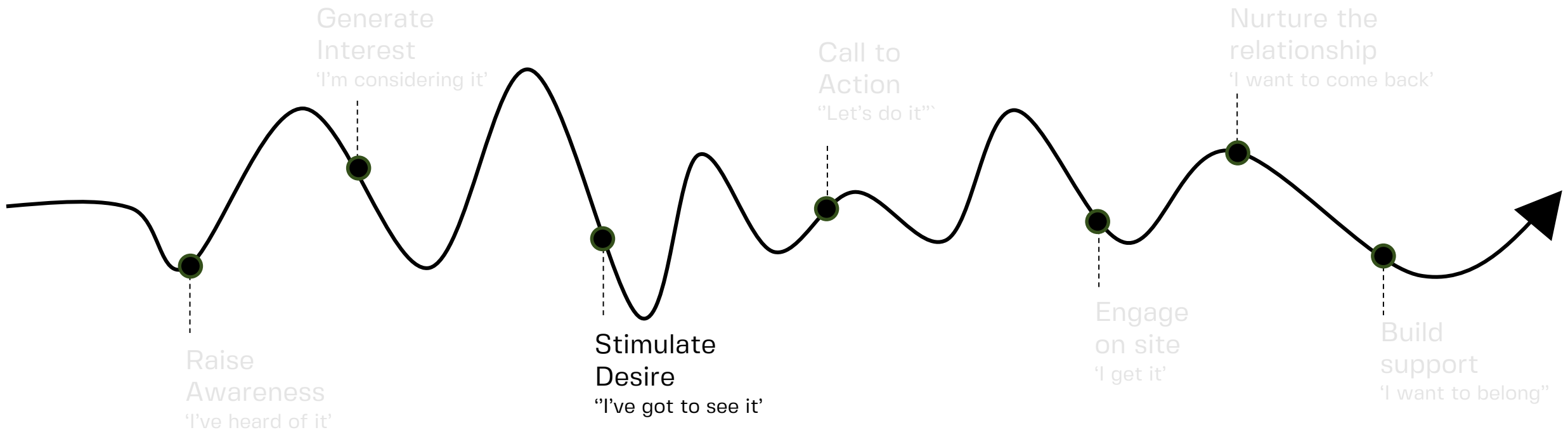
Engage on site

Nurture the relationship

Build relationships

# Stimulating desire

Stimulating a desire to visit does not come from information — it comes from a sense of promise. The feeling that this is what audiences have been looking for. Kulturpuls shows that the promise of joy, escapism and connection with others' are more important than ever in the current climate. Audiences still want depth and 'seriousness', but not at the cost of what makes culture uplifting. At the same time, they're value-conscious. Families especially are scrutinizing experiences more than ever, to make sure the cost of the whole day out is going to be worth it. So the challenge isn't just to be seen, it's to promise and deliver a series of benefits that resonate and offer undeniable value.



*“[I want] to be engaged, absorbed and captured by what I see and experience... something enriching that sends me home with a smile on my face... And doesn’t cost a fortune”*

# Friction points

## We are expected to balance joy with depth

- Now - perhaps more than ever - audiences are looking to cultural experiences as an antidote to the volatile and unsettling global situation
- When asked what sort of outcomes they wanted from cultural experience, audiences consistently cite benefits like enabling quality time together, facilitating escapism from stress and experiencing joy. Obviously this varies by artform [we have the artform data] but the overall picture was fairly consistent
- Only a minority (11%) actively look to engage with important social or political issues via culture. This is not to say we should shy away from tackling these issues, just that it needs to be handled strategically, with sensitivity and not at the expense of providing a good time

## We get scrutinised more than ever on value

- It's no surprise that the cost of living crisis has significantly impacted audience spending power, but the survey highlights just how deeply
- Audiences are more vigilant than ever on value – they are doing more research and planning to assure themselves that experiences are 'worth it'. This applies to the whole day out – tickets, transport, food and shop
- Families are particularly cost sensitive. When they consider but ultimately reject attending, the main reasons are:
  - Cost of whole day out (e.g. transport, food and drink)
  - The location is too far away / difficult to get to
  - Cost of admission seemed too high

## What do audiences seek cultural experience?

**Connection** - quality time with friends and family: 41%

**Joy** - Sheer fun and enjoyment: 39%

**Discovery** - Unique surprising experiences ; 38%

**Control** - The satisfaction of great value: 34%

**Escapism** - Escapism from the stress of life : 32%

**Reflecting** - on the world around me: 20%

**Engaging** - in important social or political issues: 11%

# Young people focus



© Aflo images

## They are curious and open to new experiences

- Young audiences are open to trying a wide range of cultural activities they haven't yet experienced, including: Live comedy (38%); Music festivals (36%); Film festivals (24%); Museums (22%); Classical music (20%); Historic sites (18%)

## But we have to demonstrate value

- They are less convinced of culture's relevance or intrinsic value today – only 8% agree that cultural experiences are “more important than ever. We have to prove our worth

## They seek meaning as well as enjoyment

- Nearly half (47%) expect cultural experiences to help them learn about important issues, compared with 37% overall. This is the most important driver for them

# Social and political issues – what’s our role?

- It’s no surprise that, when asked, audiences tend to prefer joyful, uplifting experiences over those that focus on ‘heavy’ political or social issues
- Yet as cultural institutions, we often carry a responsibility to engage with the pressing issues of our time. Activism is embedded in the vision of many organisations – and speaking out against injustice has arguably never been more vital
- So how do we strike the right balance between these seemingly competing priorities?
- The answer lies in being intentional about our role. Why are we choosing to engage? What impact are we hoping to create?
- We’ve identified three distinct roles cultural institutions can play in navigating this space. Which role do you want to play?

## 1. Truth Teller – purveyor of facts and context

Core idea

- Cultural institutions as trusted sources of evidence, history, and context in an era of misinformation

What it looks like in practice

- Presenting verified facts and contextualizing them through content
- Using collections to fact-check public narratives or myths
- Making complexity accessible – helping the public understand nuance rather than taking sides

## 2. Convener – space for dialogue, debate, and reflection

Core idea

- Cultural institutions as civic “safe spaces” for difficult conversations

What it looks like in practice

- Hosting forums, debates, and creative commissions that bring together diverse perspectives
- Providing neutral ground for communities who might not otherwise meet
- Encouraging active listening and empathy through artistic or participatory processes

## 3. Protagonist – taking a stand

Core idea

- Cultural institutions as active participants in shaping social or political change – using their voice, collections, and programme to advance specific values or causes

What it looks like in practice

- Programming that explicitly supports causes
- Partnerships with activist groups or policy influencers
- Using cultural capital to advocate for systemic change

Raise Awareness

Generate Interest

Stimulate desire

Call to action

Engage on site

Nurture the relationship

Build relationships

# Opportunities

## Individually we could...

- Highlight the emotional benefits of visits, such as fun, joy, and quality time, in marketing and programming
- Clearly communicate what's free or included to increase perceived value
- Develop bundled offers to help address the overall cost of a visit
- Provide flexible pricing options or discounts, particularly for families and local audiences
- Make transport and accessibility information easy to find and consider partnerships to improve access
- When addressing social or political themes think carefully about our role and be intentional

## As partners we could...

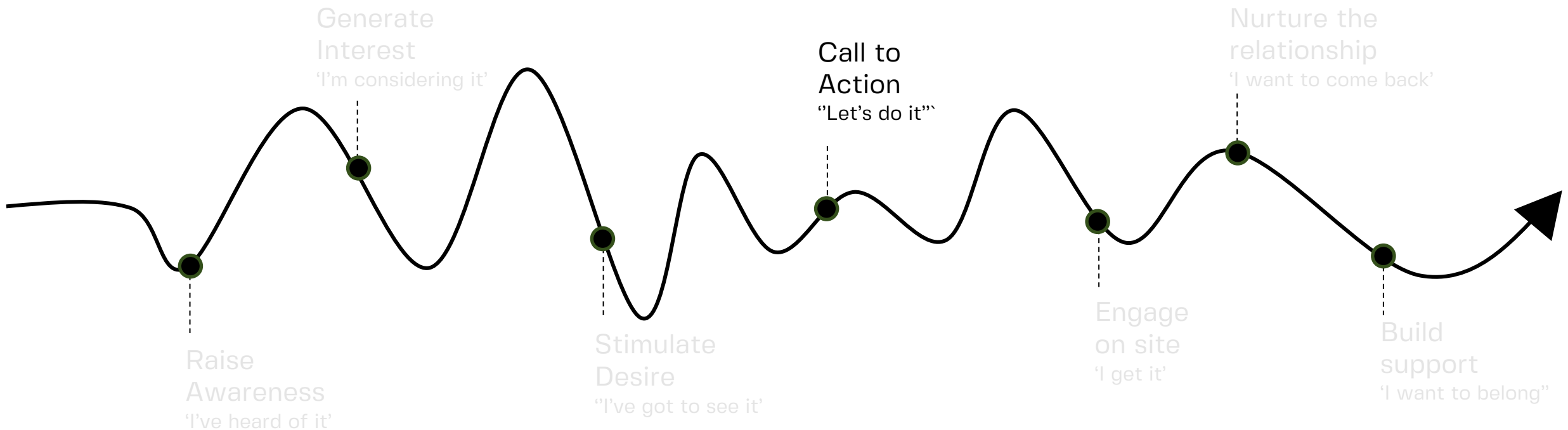
- Co-create a joint value proposition to increase appeal and reduce perceived cost
- Develop shared thematic programming that emphasises positive, feel-good experiences
- Cross-promote through each other's channels to encourage visits to multiple venues
- Consider cumulative discounts or rewards to incentivise multi-venue engagement

## As a regional group we could...

- Advocate for subsidised transport or regional cultural passes to support access from underserved or remote communities
- Coordinate to map and promote family-friendly cultural trails with clear cost-saving incentives and easy planning tools

# Call to action

Converting interest into action is all about minimising barriers and minimising risk for the uninitiated. Audiences — especially those less familiar with cultural spaces — expect a seamless experience when it comes to research, ticketing, travel, and access. While these may seem like basics, data consistently shows that practical, solvable barriers still deter would-be visitors. Too often, institutions successfully generate interest and desire, only to lose audiences at the final hurdle due to clunky or confusing processes. In today's world, convenience isn't a luxury — it's a baseline expectation.



*“I visited [venue] website, and  
couldn't figure out what was  
happening that weekend...  
so in the end I gave up”*

# Friction points

## We aren't always clear on the basics

Seemingly small barriers in the visitor journey can significantly deter audiences from attending cultural venues.

When asked if they had ever considered visiting a venue but ultimately decided against it, the findings were striking.

Many potential visitors are put off because they can't get a clear sense of what the experience will be like — websites feel confusing, and practical details like childcare facilities are hard to find.

While the deterrence rates for these issues may appear modest, the potential increase in attendance from addressing them is substantial.

## Reasons for deciding against a visit

10% I didn't know enough about the venue

6% couldn't get a clear sense of what a visit would be like

4% didn't think the venue offered childcare facilities or family-friendly spaces

4% felt the website was difficult or confusing for finding information

# Friction points

## **We still feel intimidating to the uninitiated**

Audiences often perceive unfamiliar venues as specialist, rarefied, or intimidating spaces.

Details that may seem obvious to insiders — like what to wear — can feel completely unfamiliar and off-putting to new visitors.

Many aren't sure of the "rules of engagement," and it's essential that we actively work to reassure and welcome them.

## **Reasons for deciding against a visit**

**5%** felt the venue looks like it was for specialists

**4%** wouldn't know what to wear

**3%** felt the venue seems intimidating or unwelcoming

Raise Awareness

Generate Interest

Stimulate desire

**Call to action**

Engage on site

Nurture the relationship

Build relationships

# Opportunities

## Individually we could...

- Use simple, inviting calls to action to guide visitors and set clear expectations
- Add easily accessible “Know before you go” information to communications
- Share real visitor stories and testimonials to make the venue feel welcoming and relatable
- Create targeted content for first-time or unsure visitors, such as videos or checklists
- Regularly review and update online presence to ensure all practical visitor information is accurate and easy to find
- Ensure website navigation is clear and user-friendly, especially for key details like family info, pricing, transport, and current events

## As partners we could...

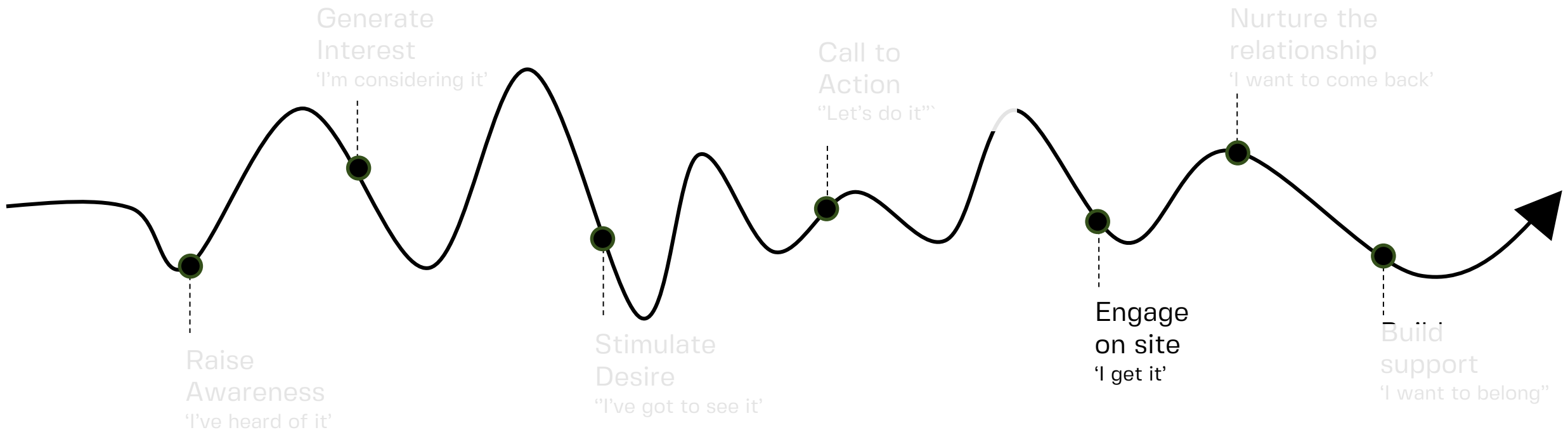
- Run joint campaigns with clear, unified messaging to welcome new visitors
- Offer incentives that encourage visitors to explore multiple partner venues
- Share best-practice templates for accessible and welcoming web content across partners
- Cross-train front-of-house staff to provide consistent, reassuring guidance to visitors

## As a regional group we could...

- Coordinate a regional campaign to demystify cultural visits, e.g. “Culture — no dress code required.” Use real people and local stories
- Develop a shared UX checklist or web audit tool for venues to improve clarity on their digital platforms
- Provide resources for smaller venues to build friendly first-time visitor journeys — like templated “what to expect” guides, videos, or scripts
- Facilitate regional staff training on welcoming hesitant audiences — turning “specialist” reputations into approachable expertise

# Engaging during the visit

Engaging visitors during their visit is all about delivering on the promises made in your communications. If you've told audiences they'll find joy and connection at your venue, the experience must live up to that expectation. Great content is of course the key, but regional audiences have also highlighted the importance of not overlooking the often 'unglamorous' essentials—a welcoming arrival, clear signage, spotless facilities, and great food. These 'hygiene factors' alone won't guarantee success, but neglecting them can seriously undermine the visitor experience and make people less inclined to return.



# Friction points

## We don't always design with audiences in mind

- Insight into audience expectations and outcomes shows a clear pattern: people aren't always getting the kind of experience they hope for from cultural venues
- This data combines responses from different venues and should be read with some care, the message is consistent—audiences want experiences that feel meaningful, enjoyable, and enriching, but often leave feeling underwhelmed
- Interestingly, the gap between expectation and delivery is smaller when it comes to more traditional strengths—like offering seriously high-quality art or content. This suggests that while venues are doing well on the “serious” and “high-quality” front, they’re less successful at delivering on things like fun, social connection, and escapism
- The takeaway for venues is simple but important: **be clear about the impact you want to have**, design the experience to match that goal, talk about it in your communications, and track whether it’s working. If there’s a gap between what you aim to deliver and what audiences actually experience, take steps to close it

	I want this	I get this	The gap
Quality time with family and friends	41%	30%	-11%
Sheer fun and enjoyment above all else	39%	26%	-12%
Unique, surprising experiences I can't get anywhere else	38%	25%	-13%
Learning about important subjects	37%	23%	-14%
Satisfaction of a great value day out	34%	24%	-11%
Escapism from the stress of daily life	32%	22%	-10%
Broadening my own / my children's horizons	28%	20%	-9%
Seriously high-quality art or content	26%	24%	-3%
A deep sense of connection to the art / performance	22%	17%	-5%
A space to reflect on the world around me	20%	10%	-10%
Supporting an important cause / past time	18%	14%	-4%
Feeling part of a community of like-minded people	17%	14%	-3%
Engaging in important social or political issues	11%	8%	-4%
N=	1504	1121	

# Friction points

## We risk losing on the functional aspects

- While getting the practical details right won't guarantee success on its own, neglecting them can quickly harm the visitor experience
- Audiences now have high expectations for cultural experiences—they expect the same level of quality and service they receive elsewhere
- Increasingly, a warm and effective welcome, clear information, helpful staff, clean and well-maintained facilities, and a high-quality wrap-around offer can be decisive factors in whether people choose to visit—and return
- Quality cafés and shops, in particular, are becoming basic expectations and need to be able to hold their own against other local 'commercial' options
- Together, these elements create a foundation that allows visitors to fully engage with what we have to offer on a more meaningful level

Which if any of these elements have genuinely helped to encourage you to visit or revisit a cultural institution in the next 12 months?

A high-quality <b>cafe or restaurant</b> - 23%	A <b>high-quality shop</b> - 12%	Clean and well-maintained <b>restrooms and facilities</b> - 25%
An <b>effective arrival</b> and welcome experience - 15%	Plenty of <b>information to explain</b> the content / exhibitions / performances - 29%	<b>Great staff</b> to help make the most of the visit - 27%

# Opportunities

## Individually we could...

- Map the visitor journey to identify friction points and ensure the experience aligns with promised outcomes
- Invest in “hygiene factors” like welcoming staff, clear signage, clean facilities, and high-quality cafés and shops to create a strong foundation.
- Design experiences that balance high-quality content with opportunities for fun, social connection, and escapism
- Communicate clearly what visitors will feel and gain, not just what they will see
- Collect feedback during and after visits to identify gaps between expectations and delivery, and act on them quickly

## As partners we could...

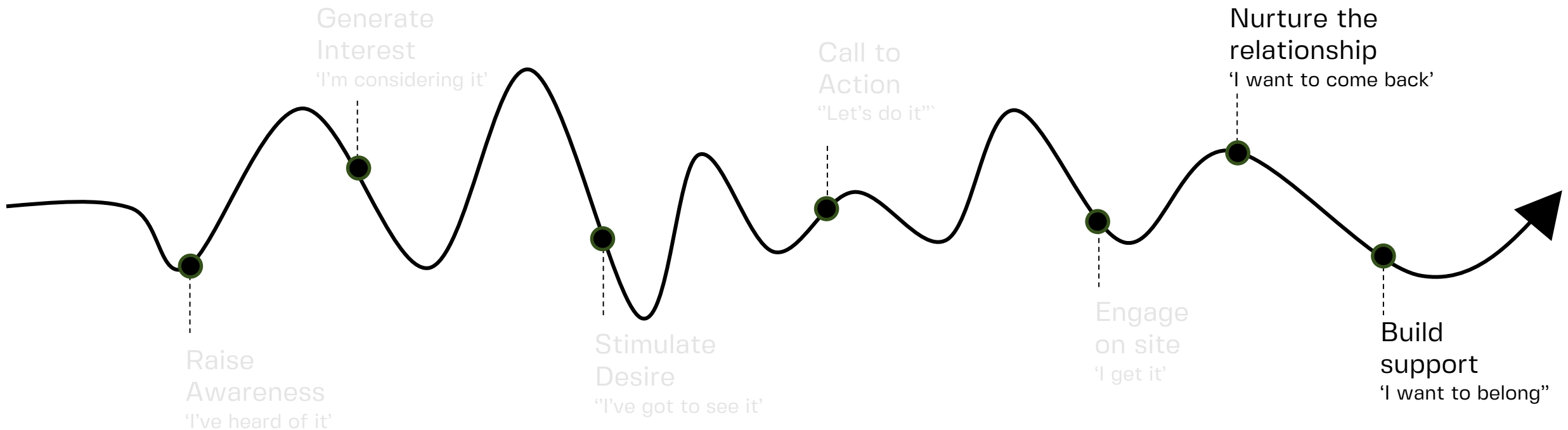
- Co-ordinate programming that encourages cross-venue journeys emphasizing diverse types of experience: meaningful, fun, and social
- Share insights from audience feedback and operational improvements to accelerate learning and close experience gaps across partner organizations

## As a regional group we could...

- Establish a regional mentoring or peer-review program where venues support each other in improving practical and experiential standards
- Create regional recognition or accreditation for venues excelling in both hygiene factors and emotional impact, promoting aspirational standards
- Facilitate regional research to track gaps between audience expectations and experiences across multiple venues, identifying patterns and opportunities.

# Nurturing the relationship and building support

Audiences want more meaningful engagement after their visit than we currently provide. While we're good at gathering feedback through lengthy surveys, we fall short in keeping the conversation going, offering valuable follow-up content, suggesting new things to try and inviting audiences to join as members. To build lasting relationships, we need to move beyond data collection and build community around our venues, so that audiences want to return and provide support because of who we are.



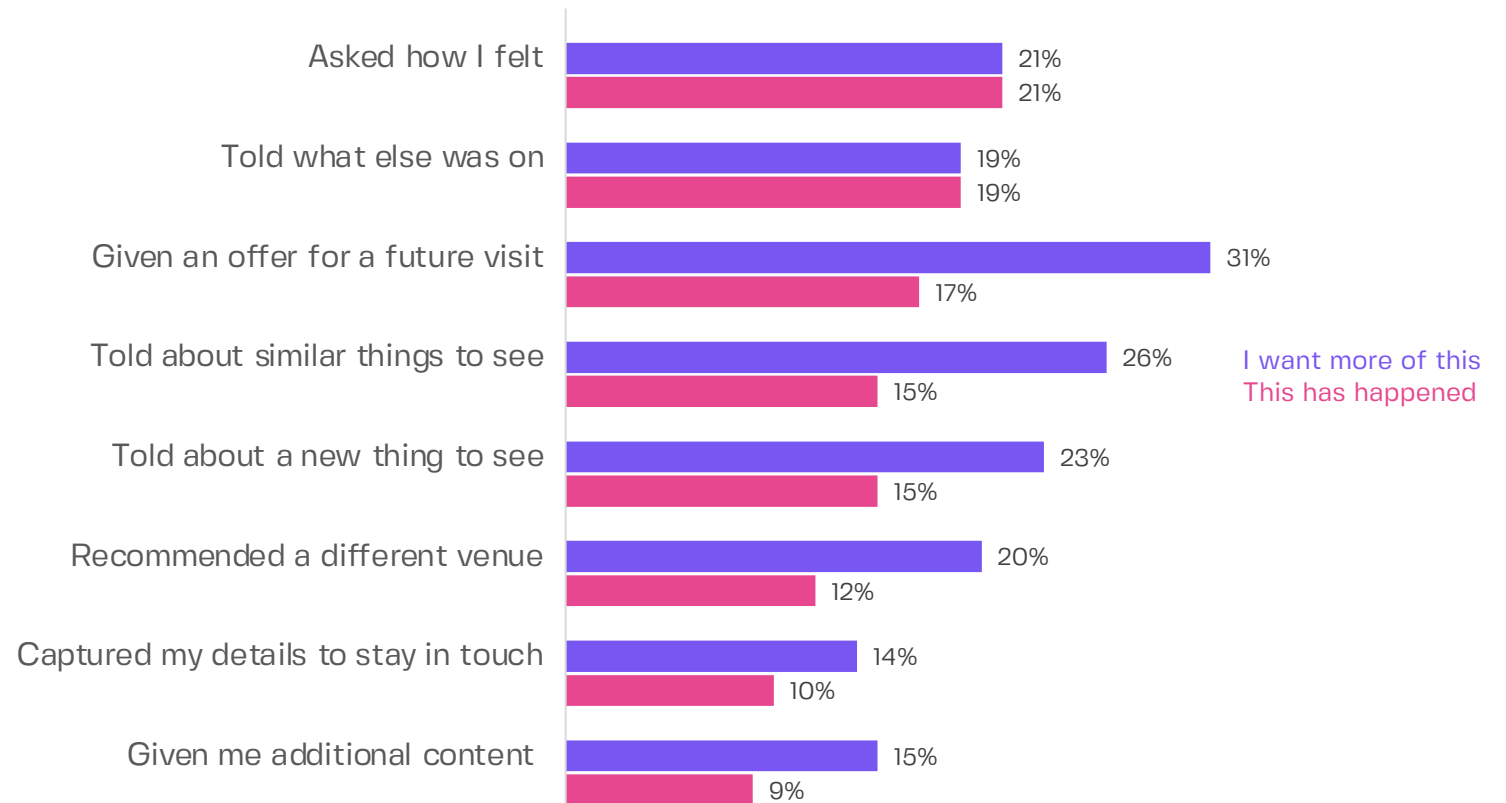
*“They should email me once a month with more information about upcoming events. Be concise, relevant and clear”*

# Friction points

## We under-deliver on post visit connection

- There is a stark gap between what audiences seek from cultural institutions post-visit, and we offer
- They want us to tell what's on; offer incentives; help them discover; recommend partner institutions; provide follow on content; and stay in touch
- The only area in which we are over-delivering as asking them how they felt – we're great at doing surveys but less good at fostering genuine connection.

## Post visit engagement - desired and actual



Raise Awareness

Generate Interest

Stimulate desire

Call to action

Engage on site

Nurture the relationship

Build relationships

# Friction points

## We haven't tapped into audience desire for membership

- Almost 4 in 10 audiences have never been a member of an arts or cultural organisation but are open to doing so.
- Memberships and subscriptions are now a standard expectation in many areas of life – why not in culture?

Audiences seek membership that offers great financial benefits. But many want more than this – introduction to new experiences; feeling part of something; priority relationships. Offering these benefits contributes to a compelling overall value proposition that drives retention and support

**38% have never been a member of a cultural institution but are interested**

**45% of those** want membership that offers compelling financial discounts

**20% of those** want recommendations, sense of community and other membership add-ons to make them feel special and part of something

Raise Awareness

Generate Interest

Stimulate desire

Call to action

Engage on site

Nurture the relationship

Build relationships

# Opportunities

## Individually we could...

- Introduce a more meaningful membership scheme that offers clear benefits, incentives, and ongoing value to capture and retain audiences
- Capture deeper data about visitor preferences and behaviours to personalise follow-up communications and content
- Offer opportunities for post-visit engagement beyond surveys, such as curated content, event invitations, or exclusive offers

## As partners we could....

- Signpost partner venue experiences to help audiences discover complementary cultural offerings
- Introduce partner membership options or member swaps to provide broader access and benefits across institutions

## As a regional group we could...

- Introduce a collective membership program, pooling benefits and incentives from multiple institutions to create a richer, more attractive offer
- Develop shared post-visit content and communications strategies that keep audiences connected and engaged with the cultural ecosystem as a whole

Raise Awareness

Generate Interest

Stimulate desire

Call to action

Engage on site

Nurture the relationship

Build relationships

# Kulturpuls

01 Introduction

02 The audience journey

**03 What's next**



# Identify opportunities and act

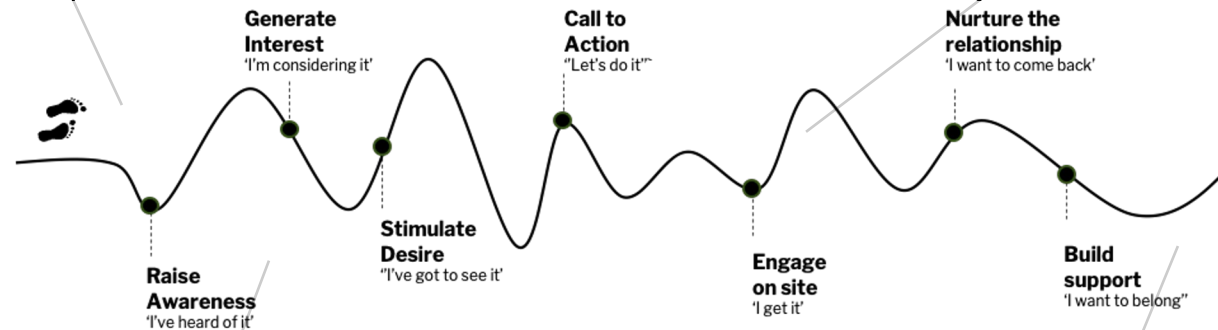
Clearly, the study has identified a number of friction points along the journey which are standing in the way of audience connection. Many of these won't be a surprise but it is important to have hard data on the scale of the challenges we face. But the study did not set out to identify problems – we want to inspire solutions. Partners have therefore been invited to reflect on their own audience engagement journey and design some audience engagement experiments – new ways of doing things to address the frictions that audiences encounter. Progress will be measured and learnings will be shared in order to build creativity and resilience across the sector. To help guide institutions on where to focus their attention, we have mapped onto the journey below a series of provocative questions you might ask yourself. If the answer to these questions is 'no' or 'sort of' then intervention might be needed.

1

Do you have well defined audience targets and bold comms to match?  
Are you marketing where these targets might see you?

3

Have you mapped the pain points and info gaps that limit conversion?  
Are you on top of the hygiene factor that can limit engagement on site?



2

Have you defined the impact you want to have on audiences and society?  
Do your messages and experience design reflect these impacts?

4

Are you capturing data to keep the conversation going?  
Are you offering meaningful engagement opportunities post-visit?

# Tack så mycket

[joss.luckin@mhminsight.com](mailto:joss.luckin@mhminsight.com)

+44 (0) 161 839 3311

[www.mhminsight.com](http://www.mhminsight.com)

