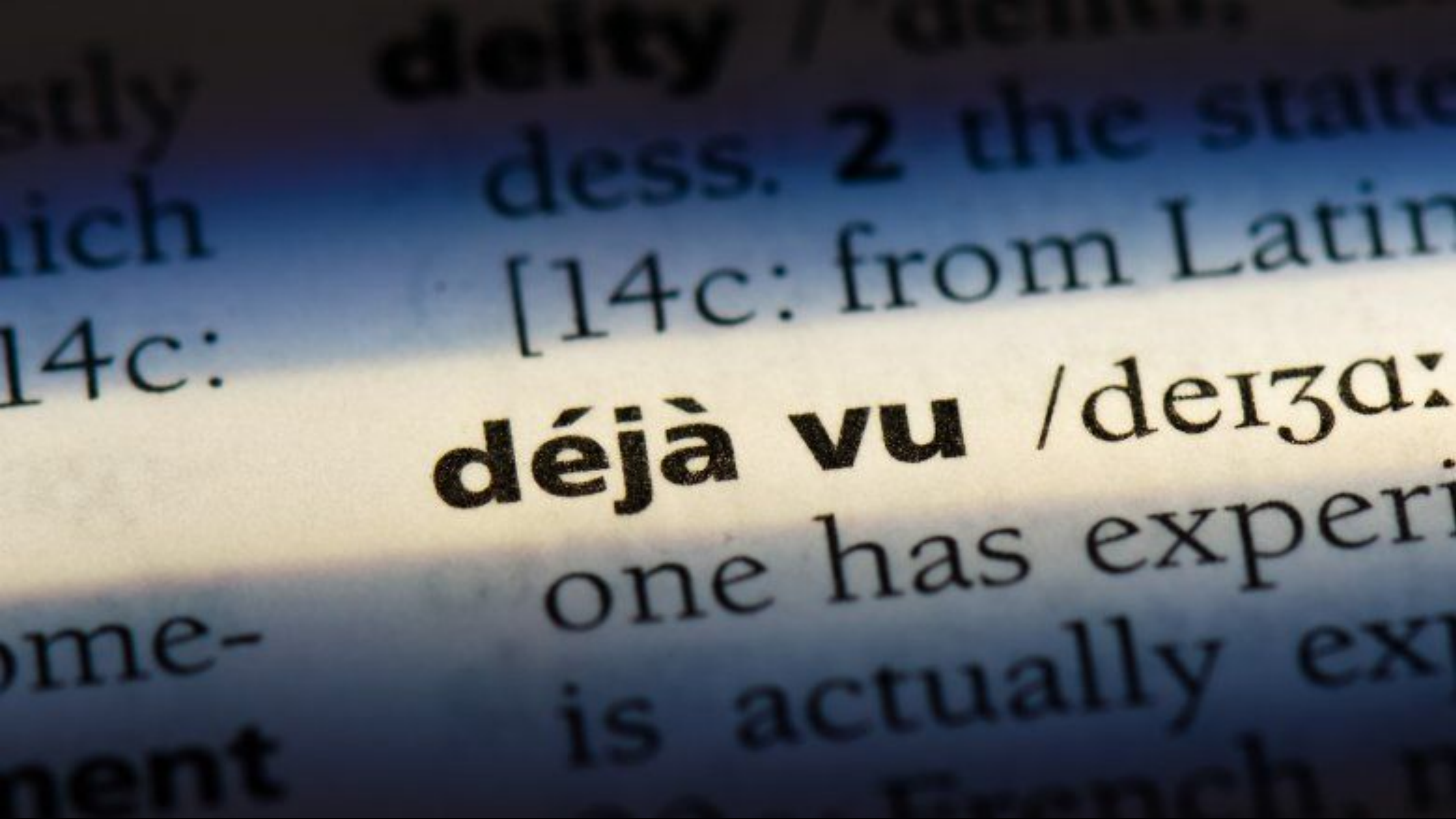
panorama de estudios y estadísticas sobre el **#comportamiento** de los **#públicos** a raíz del COVID

23/noviembre/2020

Pepe Zapata
pz.pepezapata@gmail.com
instagram + twitter: @PepeZapata


@pepezapata


¡NO OS DEJÉIS EMBAUCAR POR LOS QUE OS DICEN LA VERDAD!
elroto.elpais@gmail.com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#qué y #cómo #comunicar en tiempos de incertidumbre

6/mayo/2020

La Red española de Teatros, Auditorios, Circuitos y Festivales de titularidad pública

20 años

COMISIÓN DE ASOCIADOS de La Red

Pepe Zapata
pz.pepezapata@gmail.com
instagram + twitter: @PepeZapata

The Economist

US-China relations in crisis

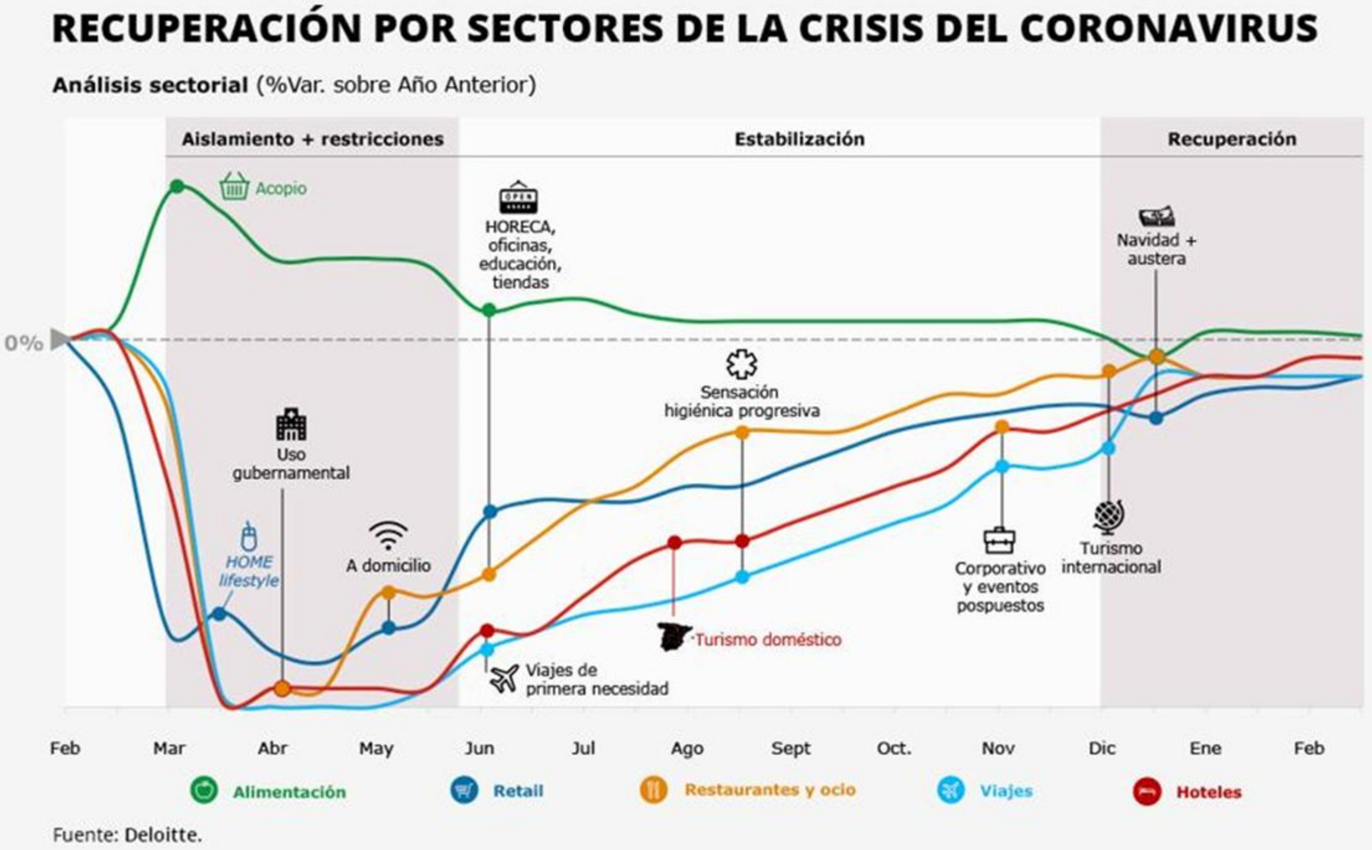
The dash to cash

Ethiopia’s hidden war

How virus-testing works

MARCH 21ST–27TH 2020

https://www.lavanguardia.com/economia/20200403/48280345019/recuperacion-economica-coronavirus-covid-19-deloitte.html

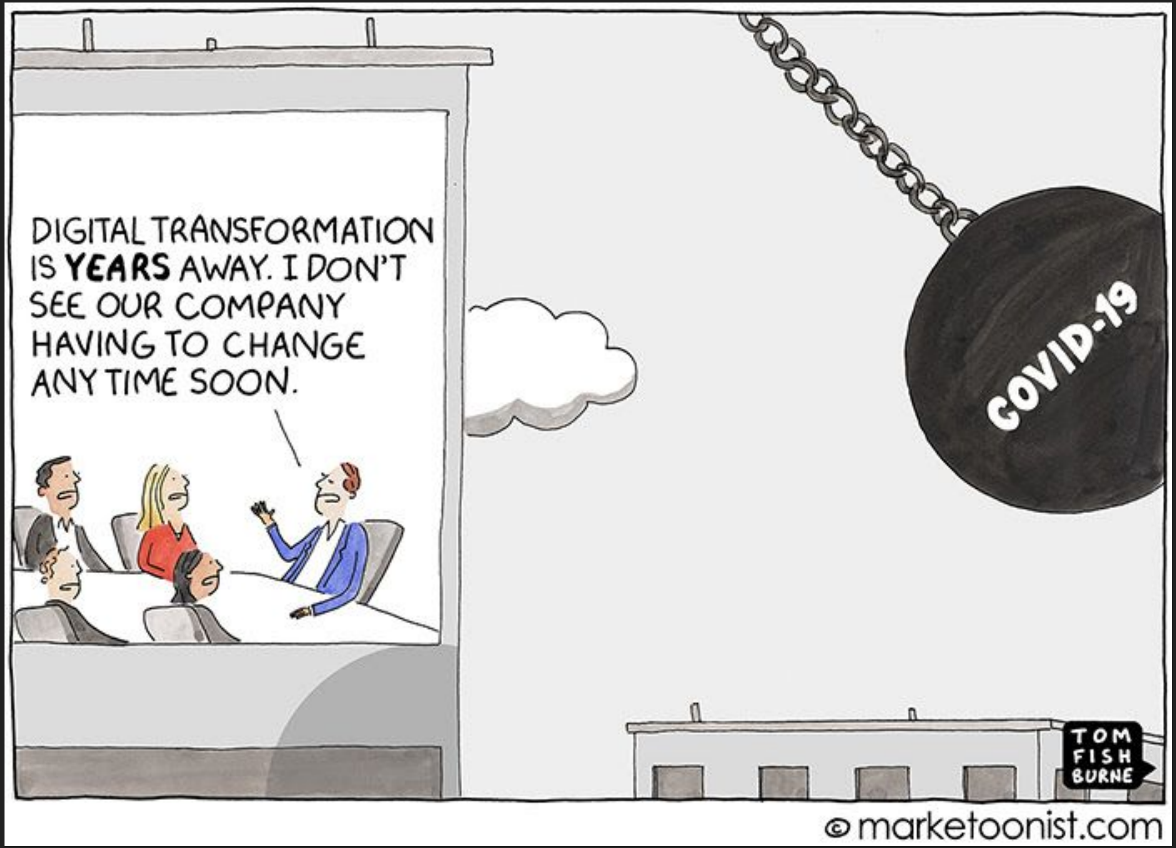


CONFINAMIENTO	NUEVA CONVIVENCIA	VUELTA A LA NORMALIDAD

1 2 3 4

reacción adaptación anticipación transformación

AISLAMIENTO	DISTANCIA DE SEGURIDAD	RELACIONES SOCIALES


DIGITAL TRANSFORMATION IS **YEARS** AWAY. I DON'T SEE OUR COMPANY HAVING TO CHANGE ANY TIME SOON.
COVID-19
TOM FISH BURNE
© marketoonist.com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MARZO-AGOSTO 2020	AHORA Y 2021	A PARTIR DEL 2021
A	B	C
urgencia	**resistencia**	**transformación**


The Economist
US-China relations in crisis
The dash to cash
Ethiopia's hidden war
How virus-testing works
MARCH 21ST–27TH 2020
CLOSED


The Economist
The economy Joe Biden will inherit
America's allies: a long wishlist
The trouble with value investing
Zambia, becoming the next Zimbabwe
NOVEMBER 14TH–20TH 2020
Suddenly, hope


NETFLIX
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HONG KONG TAXI
only in Rome
KALIBER
hotel social
ZEN&ZACK
MADEMOISELLE
ZOMBIE COLONY
KENYA
CONTRACT VENGEANCE
UNIVERSE V
SILENT NINJA
MIC NIGHT
JUILLET
PETALS

https://youtu.be/Ys1kTnwyRfs

https://barcelonadadescultura.bcn.cat/wp-content/uploads/2020/04/EncuestaCultura2019_Informe_ES.pdf

INFORME

ENCUESTA DE PARTICIPACIÓN Y NECESIDADES CULTURALES EN BARCELONA

PROCESO DE ELABORACIÓN Y ANÁLISIS DE RESULTADOS

Barcelona, febrero del 2020

Instituto de Cultura de Barcelona
Ayuntamiento de Barcelona

https://barcelonadadescultura.bcn.cat/wp-content/uploads/2020/04/EncuestaCultura2019_Informe_ES.pdf

GRÁFICO 39. MOTIVOS PARA INCENTIVAR LA ACTIVIDAD CULTURAL. RESUMEN SEGÚN GÉNERO.

P8. AHORA LE LEERÉ UNAS FRASES. ¿ME PODRÍA DECIR EN QUÉ GRADO ESTÁ DE ACUERDO CON CADA UNA DE ELLAS?

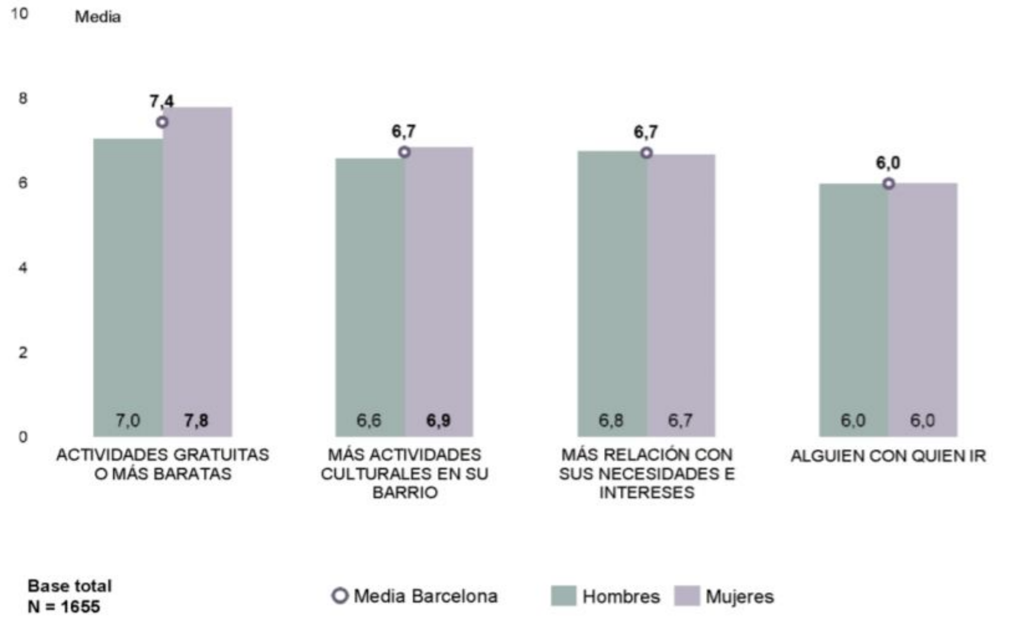

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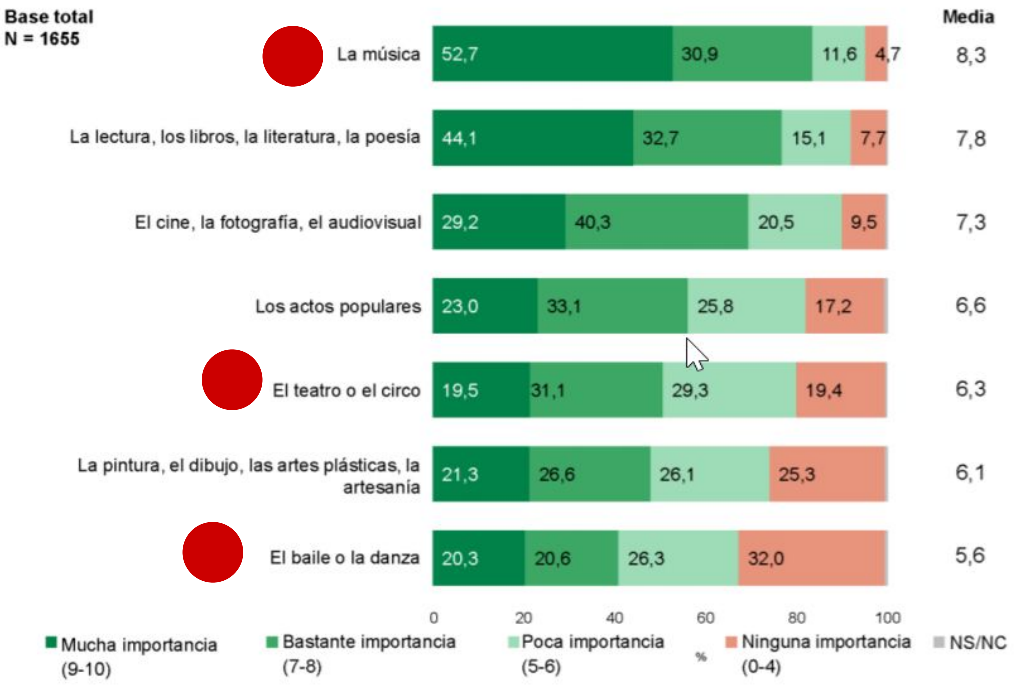
GRÁFICO 53. IMPORTANCIA DE LAS ACTIVIDADES CULTURALES.

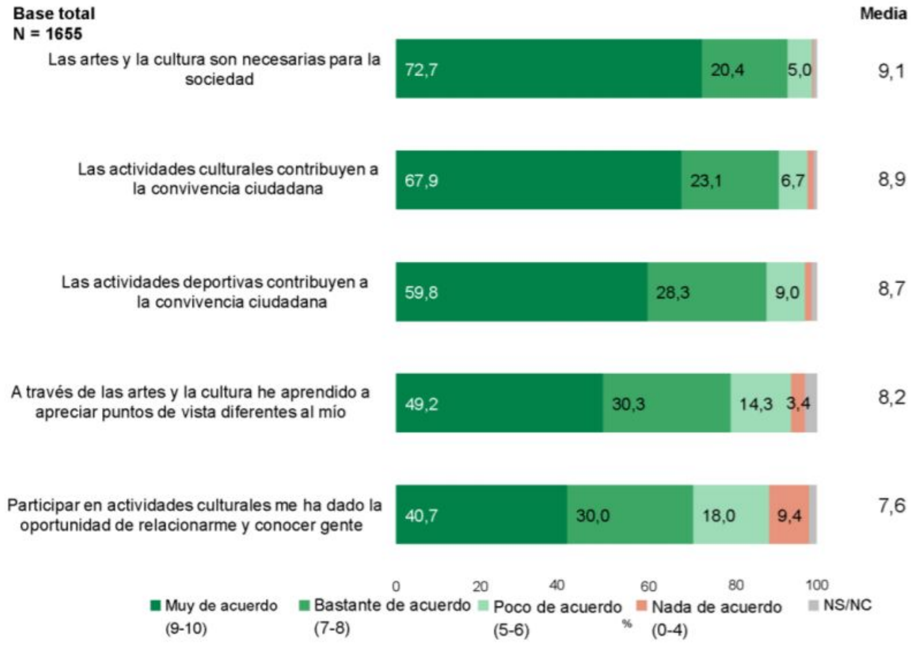
P9. ¿QUÉ IMPORTANCIA TIENEN EN SU VIDA...?



https://barcelonadadescultura.bcn.cat/wp-content/uploads/2020/04/EncuestaCultura2019_Informe_ES.pdf

GRÁFICO 54. ATRIBUCIÓN DE VALORES A LA CULTURA.

P13. ¿ME PODRÍA DECIR EN QUÉ GRADO ESTÁ DE ACUERDO CON LAS SIGUIENTES AFIRMACIONES?

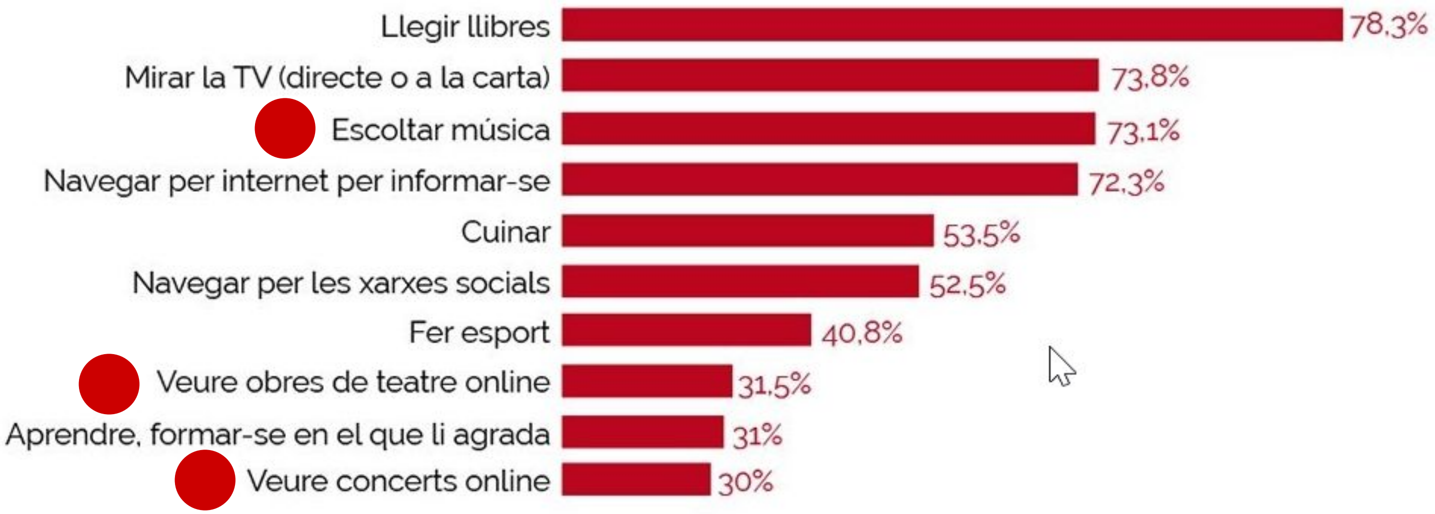


https://www.tresc.cat/magazine/28316/com-ha-estat-el-consum-cultural/

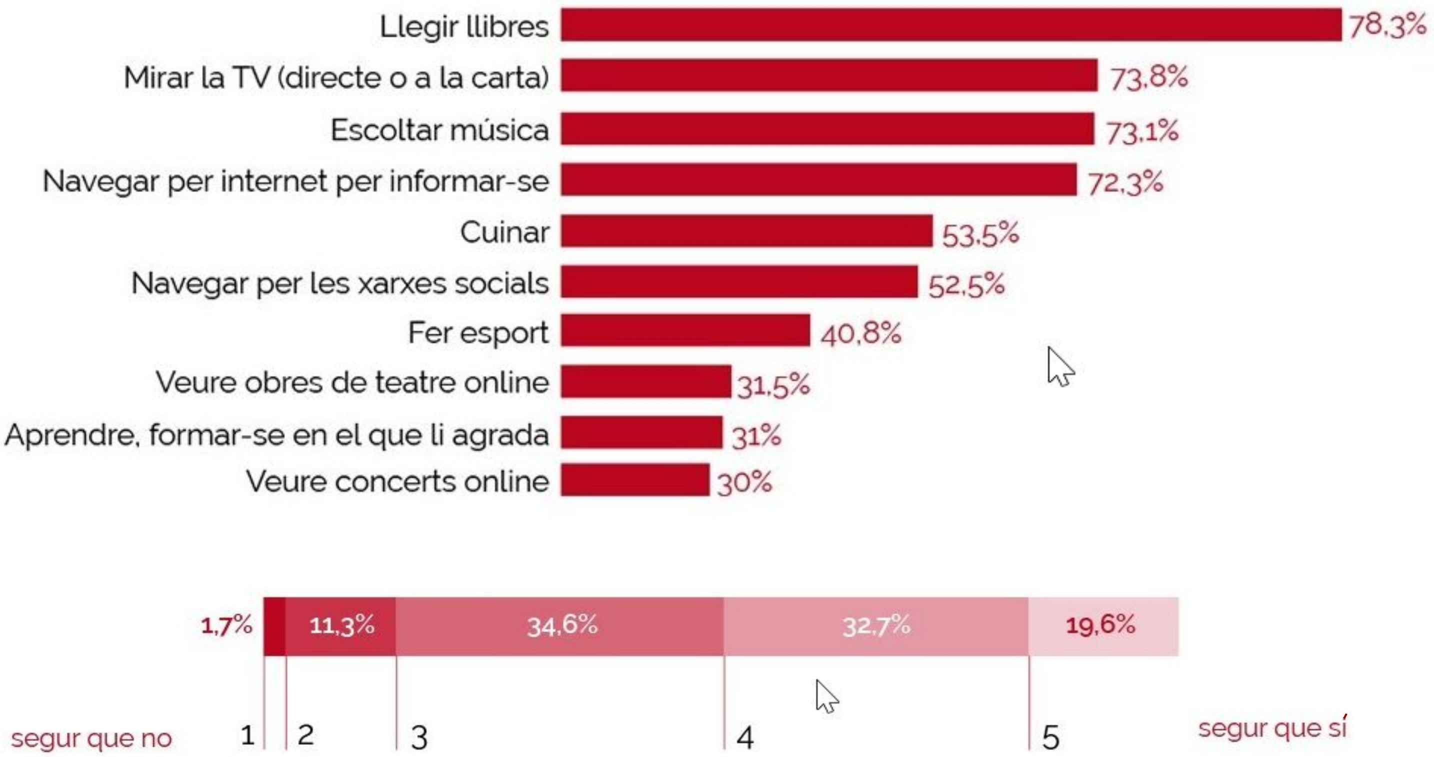
Com ha estat el consum cultural i com serà després del confinament?

17 DE JUNY *per* TRESC

https://www.tresc.cat/magazine/28316/com-ha-estat-el-consum-cultural/



https://www.tresc.cat/magazine/28316/com-ha-estat-el-consum-cultural/



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Una iniciativa de

TEATRE BARCELONA

Impacte de la pandèmia COVID-19 en les percepcions i actituds dels espectadors teatrals a Catalunya

Juny 2020

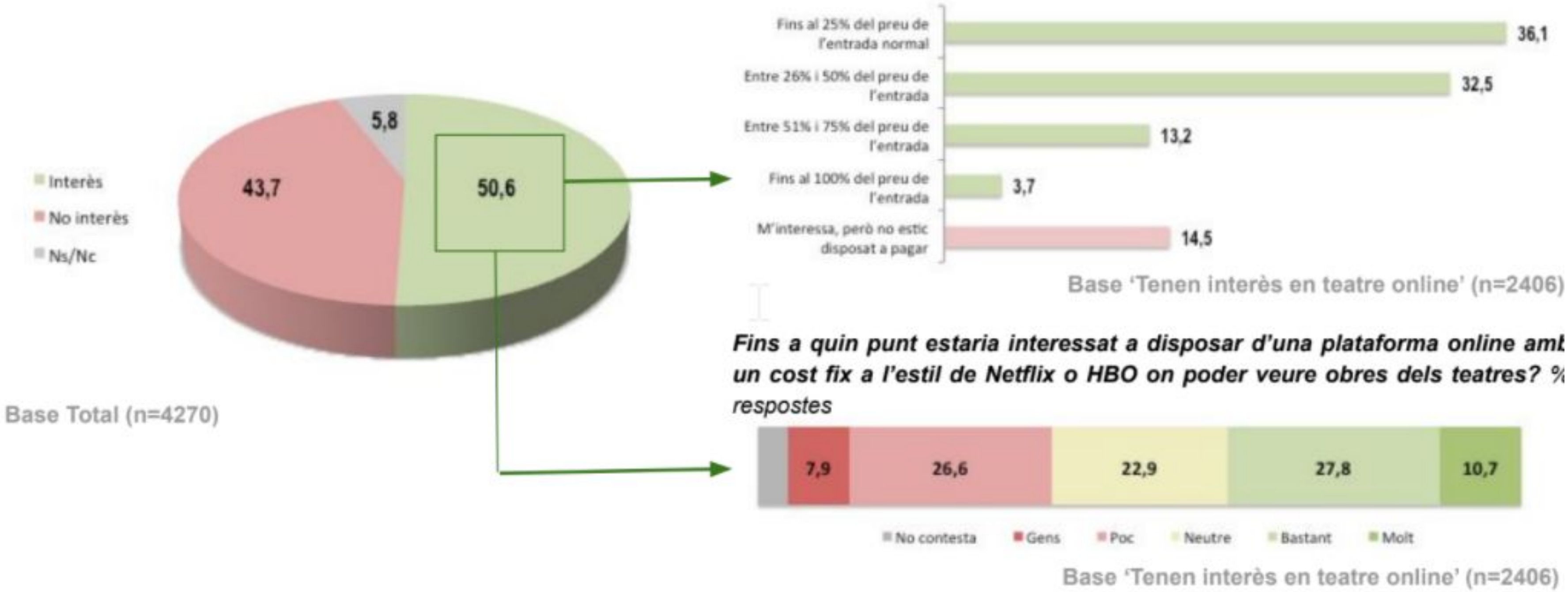
https://drive.google.com/file/d/1wbl4gty24IOWayvNLk1TrWpIDIk3P_Y2/view

Després d'aquesta crisi **hi haurà menys teatres**, alguns es veuran obligats a tancar (59,7% d'acord).

Aquesta crisi serà una **oportunitat** per al sector de les arts escèniques per a **innovar** en nous formats o nous espais (56,3% d'acord).

https://drive.google.com/file/d/1wbl4gty24IOWayvNLk1TrWpIDIk3P_Y2/view

Alguns teatres han començat a oferir o s'estan plantejant oferir obres no només de manera presencial al teatre, sinó també a través d'internet de forma virtual. En aquest sentit, fins a quin punt estaria disposat a pagar per veure un espectacle teatral online? *% respostes*



https://fundacioncontemporanea.com/wp-content/uploads/2012/10/Observatorio_de_la_Cultura_URGENTE_.pdf

OBSERVATORIO | DE | LA | CULTURA

URGENTE

24 abril 2020

FUNDACIÓN CONTEMPORÁNEA

LA FABRICA

https://fundacioncontemporanea.com/wp-content/uploads/2012/10/Observatorio_de_la_Cultura_URGENTE_.pdf

3. Oferta digital para el confinamiento

Se ha preguntado si sus organizaciones han desarrollado alguna oferta digital específica para el confinamiento.

Un 73% ha puesto en marcha alguna actividad digital en estas semanas, la mayoría (62%) ha ofrecido contenidos digitales gratuitos y un 19% ha desarrollado actividades solidarias respecto a la crisis sanitaria. Un 11% ha promocionado la venta online de sus productos culturales previos y un 9% ha conseguido nuevos ingresos lanzado nuevos productos de pago o actividades patrocinadas.

Promoción de la venta online de productos físicos: descuentos, vales de regalo...
6,3%

Venta de productos digitales: libros, películas, música, grabaciones...
4,6%

Actividad online gratis: exposiciones, cine, teatro, música, entrevistas y debates, visitas guiadas...
62,0%

Actividades de pago o patrocinadas: cursos y talleres, concursos, contenido audiovisual...
8,5%

Actividades solidarias con las necesidades de la crisis sanitaria: fondos, apoyos...
19,2%

No hemos desarrollado nada extraordinario
27,1%

4. El papel de la cultura durante el confinamiento

Respecto al papel desempeñado por la cultura durante el confinamiento, una mayoría del 71% defiende que está aportado entretenimiento cuando es más necesario y más del 50% creen que ha aliviado problemas psicológicos y ha aportado formación e información más necesarias. Tan solo el 11% creen que la presencia cultural en nuestra vida está siendo menor.

Sí, aportando entretenimiento cuando ha sido más necesario
71,3%

Sí, cubriendo una demanda extraordinaria de formación e información
52,6%

Sí, como respuesta terapéutica a situaciones de estrés, soledad o miedo
54,7%

No, ha desempeñado su papel habitual
3,4%

El consumo de cultura ha disminuido durante estas semanas
11,0%

https://fundacioncontemporanea.com/wp-content/uploads/2012/10/Observatorio_de_la_Cultura_URGENTE_.pdf

Un nuevo escenario para el sector

14. Digitalización de la oferta cultural

El 88% apuesta por la digitalización de la oferta, pero solo para el 3% en exclusiva. Para el 45% convivirán contenidos digitales y presenciales, y para el 40% los digitales serán solamente un complemento a la experiencia presencial.

A medio plazo, nuestra oferta cultural será exclusivamente digital
2,6%

Aumentarán los contenidos digitales, conviviendo con las actividades presenciales
45,1%

Desarrollaremos más actividades digitales, pero solo como complemento a la experiencia presencial
40,4%

No es viable en nuestro caso la digitalización de la oferta
11,9%

15. Limitaciones a la transformación digital

La facilidad para que el público acepte el cambio a un formato digital y esté dispuesto a pagar por ello reciben la puntuación más baja (4,45 y 3,34 sobre 10). Tampoco las organizaciones culturales están listas para la transformación digital (5,47) ni disponen de plataformas para distribuir sus contenidos (5,30).

Nuestro público va a aceptar con facilidad el cambio de nuestra oferta a un formato digital
4,45

Nuestro público asumirá sin dificultad el pago por nuestros contenidos en formato digital
3,34

Mi organización está totalmente preparada para una rápida transformación digital de su actividad
5,47

La distribución de nuestros contenidos digitales requerirá plataformas compartidas de comercialización
5,30

https://fundacioncontemporanea.com/wp-content/uploads/2012/10/Observatorio_de_la_Cultura_URGENTE_.pdf

16. Recuperación de públicos

El grado de acuerdo es elevado (8,58) respecto a la necesidad de estrechar vínculos con el público y llegar a nuevos públicos. El acuerdo es menor (6,39) respecto al interés del público por la cultura tras el confinamiento y sobre el posible impacto en el sector de una crisis del turismo de masas (5,66).

Tenemos que estrechar vínculos con el público y llegar a nuevos públicos
8,58

El público va a volver del confinamiento con más ganas de propuestas culturales que alivien consecuencias de la crisis como la soledad, el miedo o el estrés
6,39

Una posible crisis del turismo de masas va a tener un gran impacto en mi actividad
5,66

https://fundacioncontemporanea.com/wp-content/uploads/2012/10/Observatorio_de_la_Cultura_URGENTE_.pdf

18. Peso de la cultura tras la crisis

Tan solo para un 22% la cultura saldrá reforzada de esta crisis y para un 31% perderá peso en la sociedad.

La cultura saldrá reforzada en nuestra sociedad
21,9%

La cultura seguirá teniendo el mismo peso que ahora
47,5%

La cultura perderá peso en la sociedad
30,6%

19. Calidad de la oferta cultural

Tras esta crisis la oferta cultural será diferente y mejor para un 34%, frente a un 27% que opina que será peor.

Diferente y mejor que la anterior
33,7%

Esencialmente igual
38,9%

Peor
27,4%

https://titeredata.eu/wp-content/uploads/2020/05/Impacto-en-el-sector-titeres-del-covid-19-oleada-1.pdf

ENCUESTA
DE IMPACTO
DEL COVID-19

En el Sector del Teatro
de Títeres, Visual y de Objetos

1ª Oleada. Periodo: marzo, abril y mayo

TITEREDATA

Encuesta realizada entre el 30 de marzo y el 4 mayo de 2020 por el sistema de cuestionario online enviado por email a todo el censo del sector.

TITEREDATA

https://www.statista.com/statistics/1116242/things-people-will-try-and-avoid-once-covid-19-restrictions-are-lifted/

https://www.statista.com/statistics/1116242/things-people-will-try-and-avoid-once-covid-19-restrictions-are-lifted/

Thinking about once the restrictions are lifted, which of the following are you likely to try and avoid for the time being, because of coronavirus / Covid-19?

(as of May 31, 2020)

	Germany	United Kingdom	United States
Cinema / theatre	49%	58%	58%
Music festivals	57%	59%	58%
Music concerts	55%	58%	57%
Sports events	53%	57%	56%
Pubs / bars / clubs	49%	62%	56%
Gym / sports centers	43%	52%	50%
Restaurants / café's	33%	53%	46%
Large retail shops / shopping centers	28%	47%	45%
Museums / galleries	32%	45%	44%
Shopping downtown / highstreet	23%	36%	37%
Hairdressers / beauty salons	22%	36%	31%
Holidays	42%	51%	20%
Supermarket / grocery shops	7%	20%	15%

https://habo.studio/entertainment-barometer-october-2020/

Habo

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LEPOINTDEVENTE.COM
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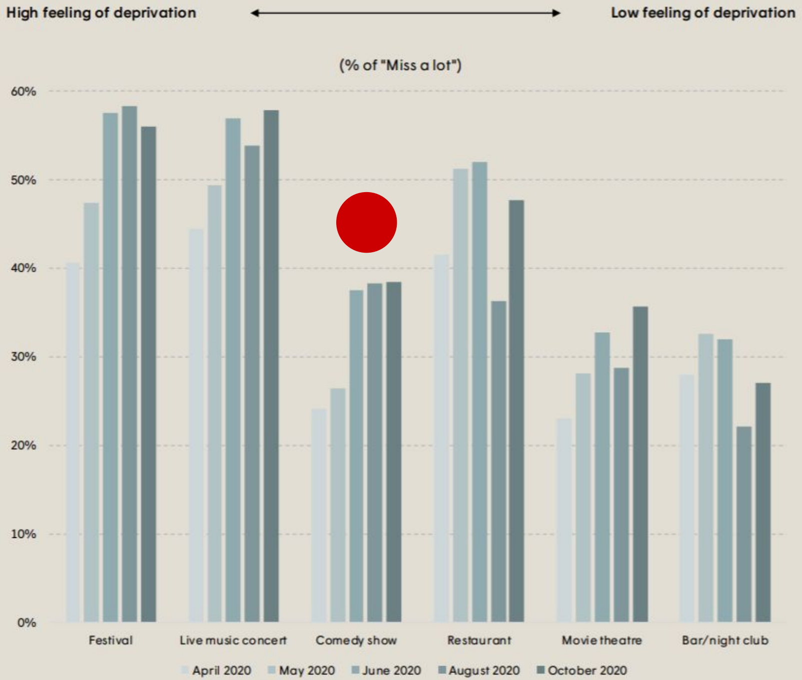
ENTERTAINMENT BAROMETER

Quebecers and entertainment in times of COVID-19

October 2020
Edition #5

https://habo.studio/entertainment-barometer-october-2020/

Audiences felt more deprived of popular music concerts, comedy shows, and the cinema, and this sense of deprivation peaked during October.



n = 30-751 (Consumers of each type of entertainment activity)

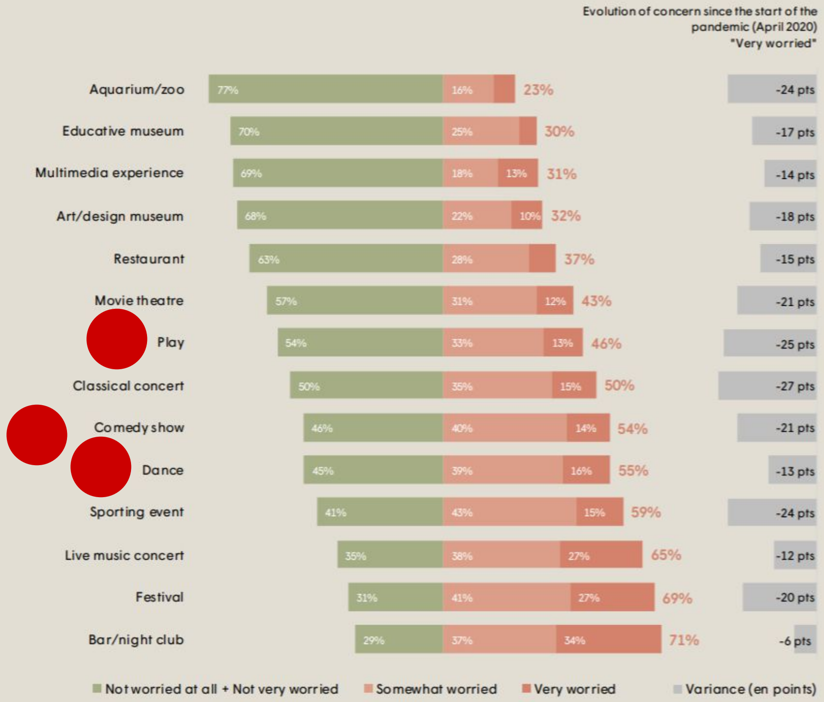
Q: To what extent do you currently miss attending the following entertainment activities?

Note: Percentages lower than 10% do not appear in the graph.

https://habo.studio/entertainment-barometer-october-2020/

Quebec entertainment consumers seem to have become accustomed to the pandemic, and are much less worried about it now than they were when it started.

However, they still have a high level of concern about attending crowded venues such as bars and nightclubs, festivals, concerts, and sporting events.



n = 22-806 (Consumers of each type of entertainment activities)

Q: How worried would you be about engaging in the following entertainment activities at the moment?

Note: Percentages lower than 10% do not appear in the graph.

https://www.gvpta.ca/files/docs/GVPTA-PatronInsightsReport-Sep_11_2020.pdf

B.C. Patron Insights

September 11, 2020

Produced by

GVPTA

Questions may be directed to GVPTA executive director, Kenji Maeda at kenji@gvpta.ca or 604-608-6799.

At GVPTA, we acknowledge that our organization is located on the unceded territories of the Coast Salish peoples of the xʷməθkwəy̓əm (Musqueam), Skwxwú7mesh (Squamish), and Səl̓ílwətaɬ (Tsleil-Waututh) Nations.

This report includes data collected between July 21 and September 8, 2020, through the GVPTA **B.C. Patron Insights** program – a decentralized data collection strategy.

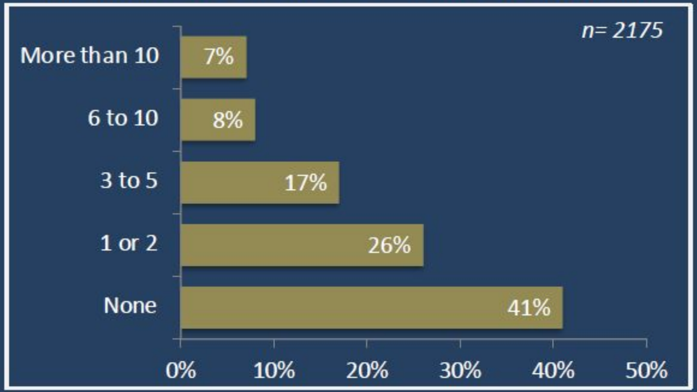
Data in this report represents responses from 2,189 patrons surveyed by 11 participating organizations across British Columbia, including those based in Metro Vancouver, Kamloops, Kelowna, Nelson, and Quesnel.

We recognize that accurately measuring patron sentiment will continue to be a moving target as new realities emerge for individuals, communities, and across the province.

To learn more about **B.C. Patron Insights** and to have your organization participate, visit www.gvpta.ca.

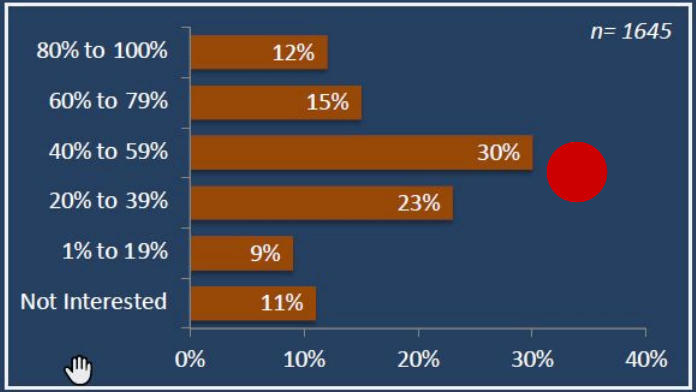
https://www.gvpta.ca/files/docs/GVPTA-PatronInsightsReport-Sep_11_2020.pdf

OF DIGITAL ARTS EVENTS, PEFORMANCES, OR VIRTUAL TOURS ATTENDED SINCE MID-MARCH



What We See
58% have attended at least one digital/online arts and culture event, performance, or activity. The most engaged patrons who participated in 6 or more accounted for **15%** of respondents.

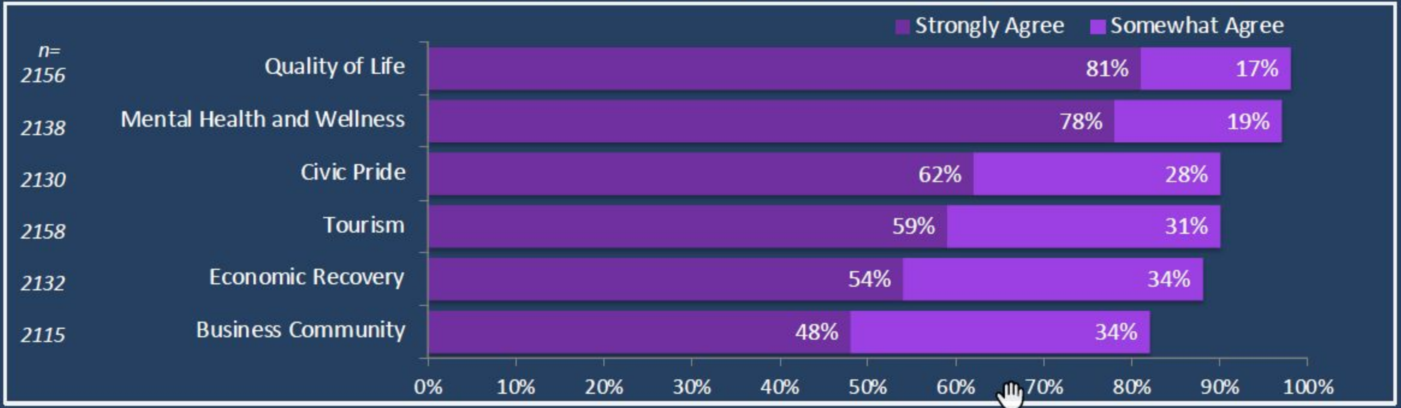
% OF TICKET PRICE PATRONS ARE WILLING TO PAY FOR SAME LIVE PERFORMANCE ONLINE



What We See
27% of patrons are willing to pay 60% or more of the regular ticket price for the same live performance online. A further **30%** of patrons would pay 40-59% of the regular ticket price. Only **11%** of respondents are not interested in buying a ticket.

https://www.gvpta.ca/files/docs/GVPTA-PatronInsightsReport-Sep_11_2020.pdf

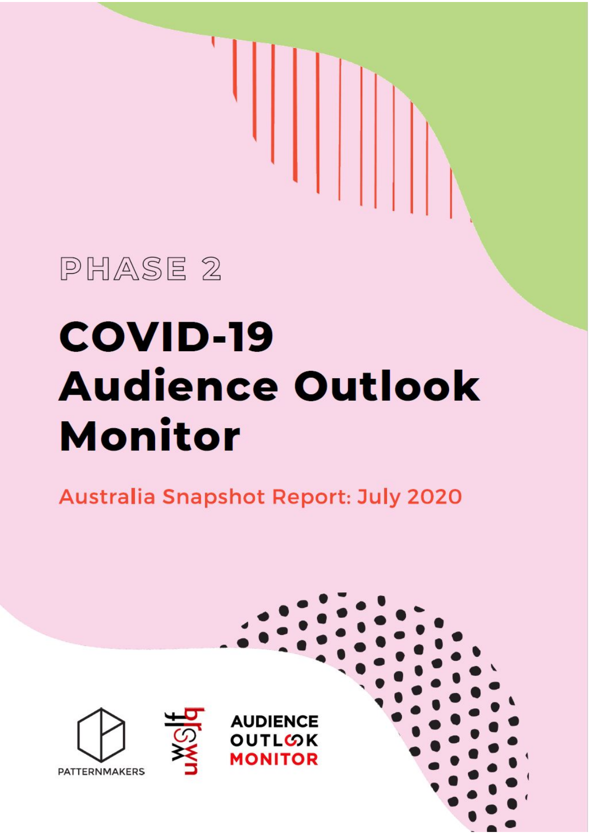
PATRONS BELIEVE ARTS AND CULTURE STRENGTHENS...



What We See

All patrons agree that arts and culture strengthens the community in many ways, including *quality of life* **(98%)** and *mental health and wellness* **(97%)**.

https://www.australiacouncil.gov.au/research/audience-outlook-monitor/



https://www.australiacouncil.gov.au/research/audience-outlook-monitor/

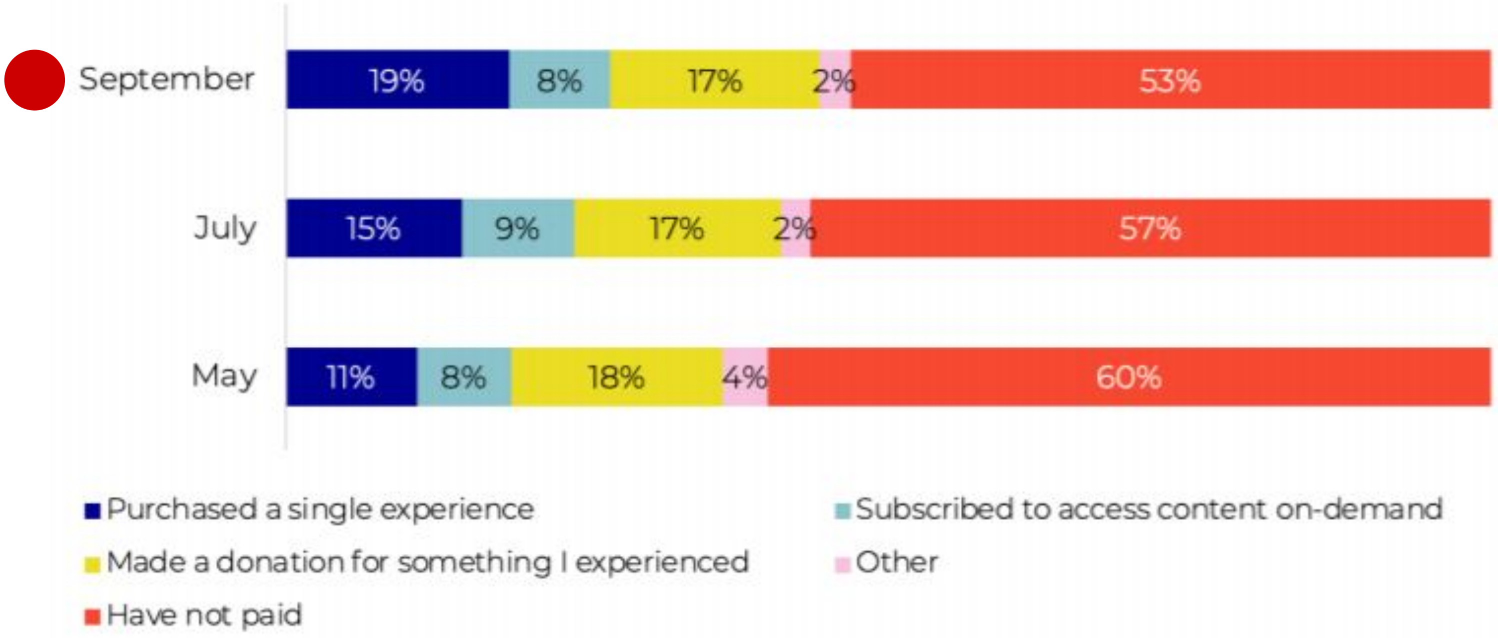
- **Audience views on attending are stable or increasing.** In September 2020, 29% of past attendees are ready to attend as soon as permitted. However, this varies across the states/territories
- **29% of past attendees have returned to a cultural event recently**. The proportion of audiences that attended a cultural event of any kind in the past fortnight has increased from 24% in July to 29% in September, as more venues and facilities reopen.
- **As performances return to venues, more people are buying tickets.** The proportion who are buying tickets has grown from 10% to 14%, and over half of ticket buyers are buying tickets for events this month (51%).
- **Social distancing is helping more people feel comfortable at large venues.** Comfort levels have also increased with a range of performance venues including large theatres and concert halls (67%, up from 61%) and comedy clubs or live music venues (37%, up from 34%).

https://www.australiacouncil.gov.au/research/audience-outlook-monitor/

- **The majority of audiences now accept the use of face masks.** In September 2020, 70% say they would find face masks encouraging.
- **Most audiences are satisfied with venue safety.** Many also acknowledge the circumstances where venue staff had made extra efforts to make people comfortable and make the experiences as 'normal' as possible.
- **Outdoor events and digital streaming continue to be the most popular formats.** However, the proportion who put digital streaming as their first choice has dropped back slightly across Australia (35%, down from 39%) and slightly more people now rank outdoor events more highly (39%).
- **Slightly more people are paying for experiences, but not necessarily spending more.** When asked if they have paid for an experience online, 39% of respondents said they have, compared to 36% in July and 34% in May 2020.

https://www.australiacouncil.gov.au/research/audience-outlook-monitor/

Figure 3: Have you paid for any online arts & culture experiences in the past fortnight? (Phases 1, 2 and 3)



https://www.audienceoutlookmonitor.com/project-updates

https://www.audienceoutlookmonitor.com/project-updates

THE AUDIENCE INVOLVEMENT SPECTRUM

RECEPTIVE — PARTICIPATORY

SPECTATING
Spectating is fundamentally an act of receiving a finished artistic product. It is therefore outside the realm of participatory arts practice.

ENHANCED ENGAGEMENT
Educational or "enrichment" programs may activate the creative mind, but for the most part do not involve creative expression on the part of the audience member.

CROWD SOURCING
Audience becomes activated in choosing or contributing towards an artistic product.

- *Youth mosaics*
- *Photography contests*
- *An opera libretto comprised of Tweets*
- *Virtual choruses*

CO-CREATION
Audience members contribute something to an artistic experience curated by a professional artist.

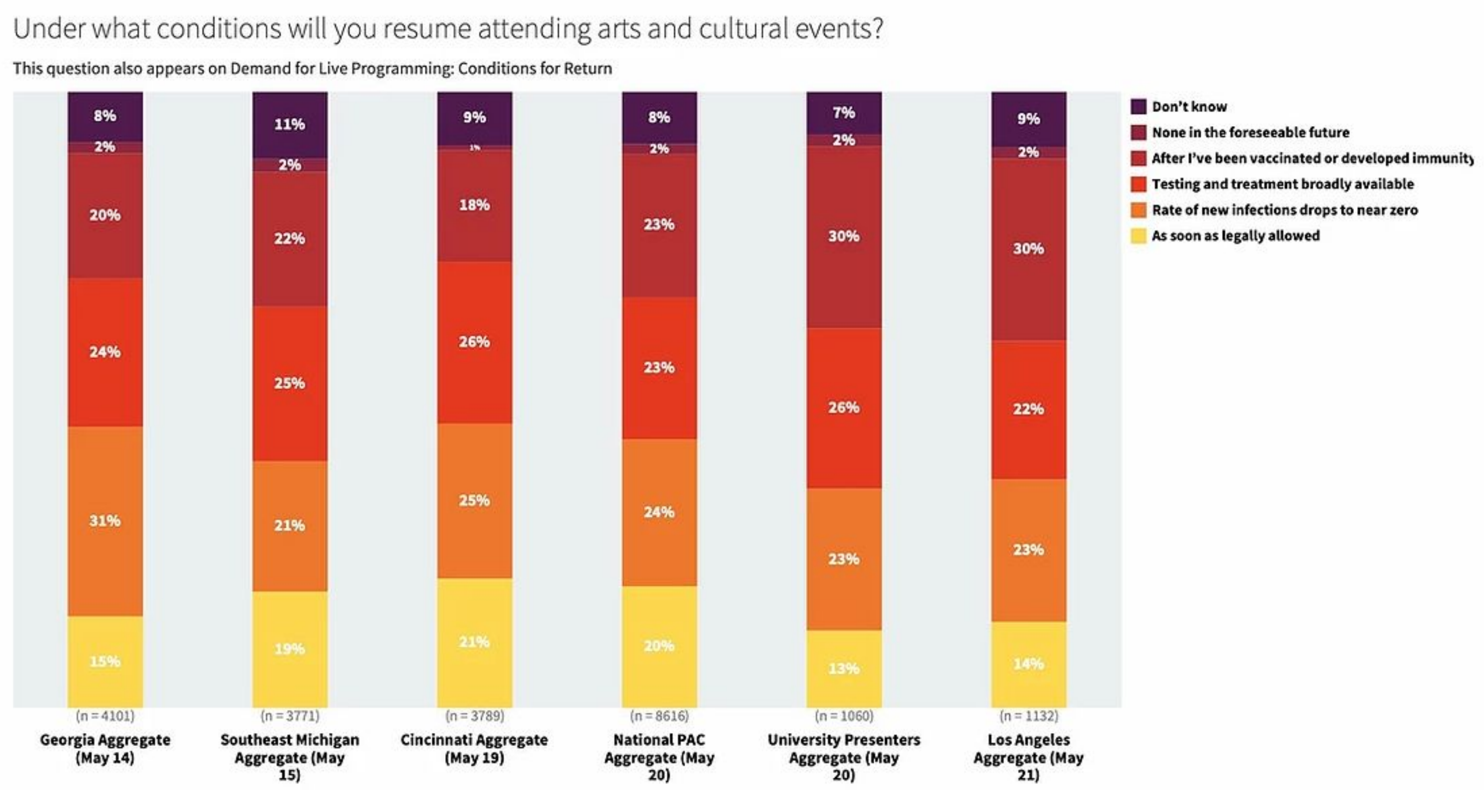
- *Participatory theater*
- *Pro/Am concerts*
- *Storytelling events*
- *Participatory public art*

AUDIENCE-AS-ARTIST
Audience members substantially take control of the artistic experience; focus shifts from the product to the process of creation.

- *Public dances*
- *Community drawing contests*

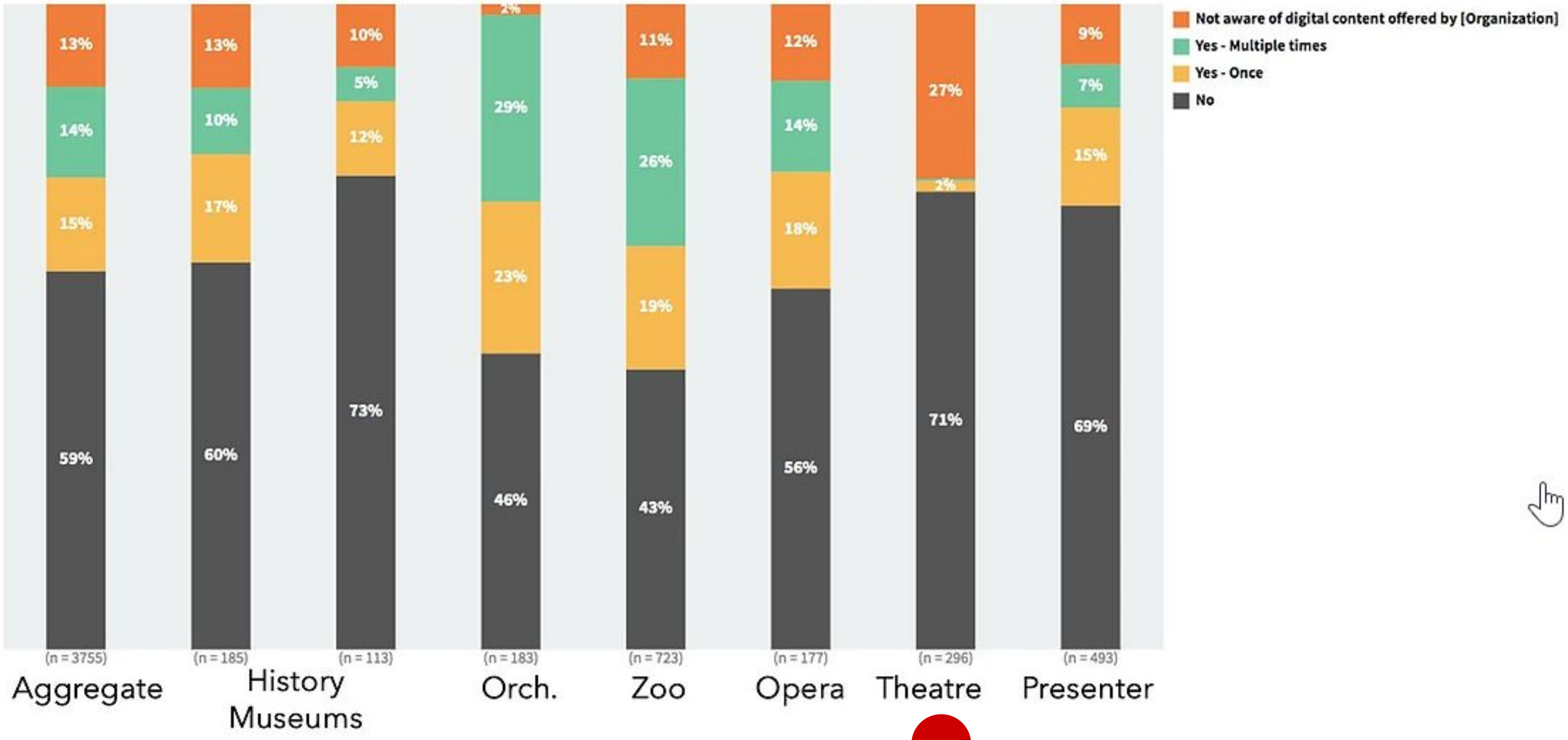
PARTICIPANT'S LEVEL OF CREATIVE CONTROL
CURATORIAL
INTERPRETIVE
INVENTIVE

https://www.audienceoutlookmonitor.com/project-updates



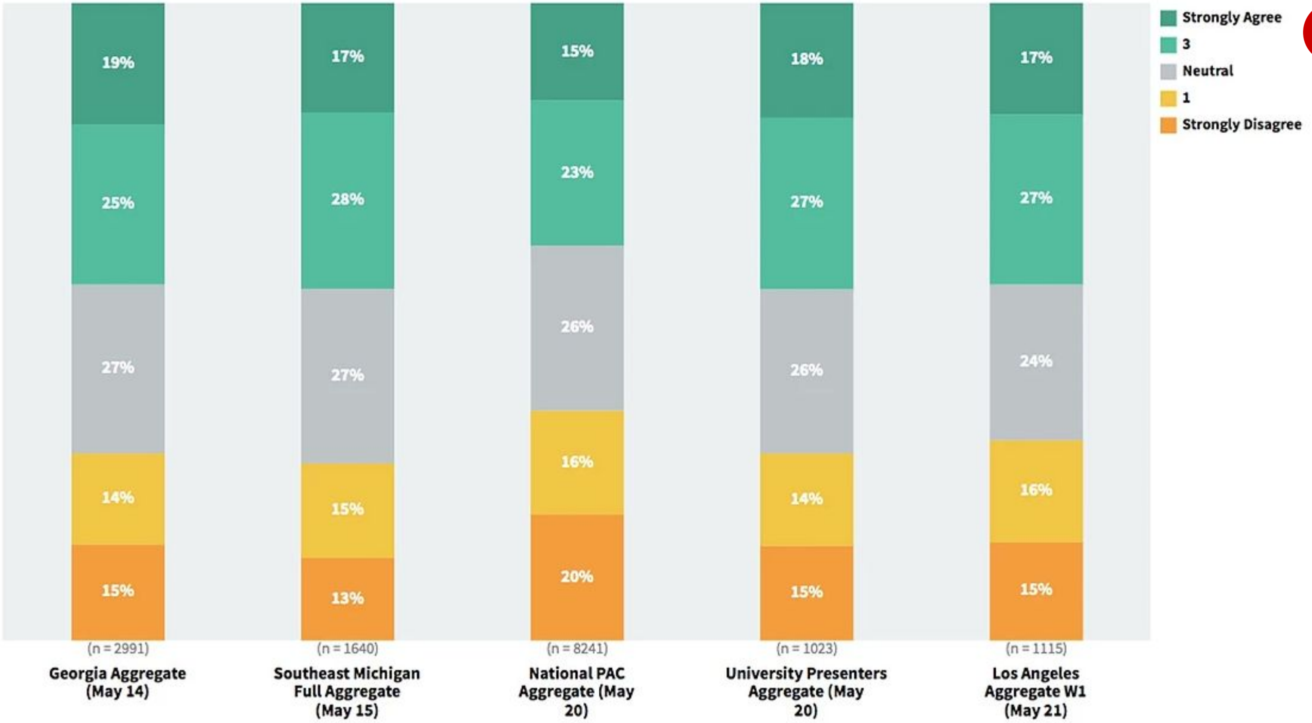
https://www.audienceoutlookmonitor.com/project-updates

Have you watched any digital broadcasts or other digital content offered or recommended by [Organization] since the health crisis started?



https://www.audienceoutlookmonitor.com/project-updates

Once I buy a ticket to a live performance, I'd like to have the choice of attending in-person or watching a live stream at home.

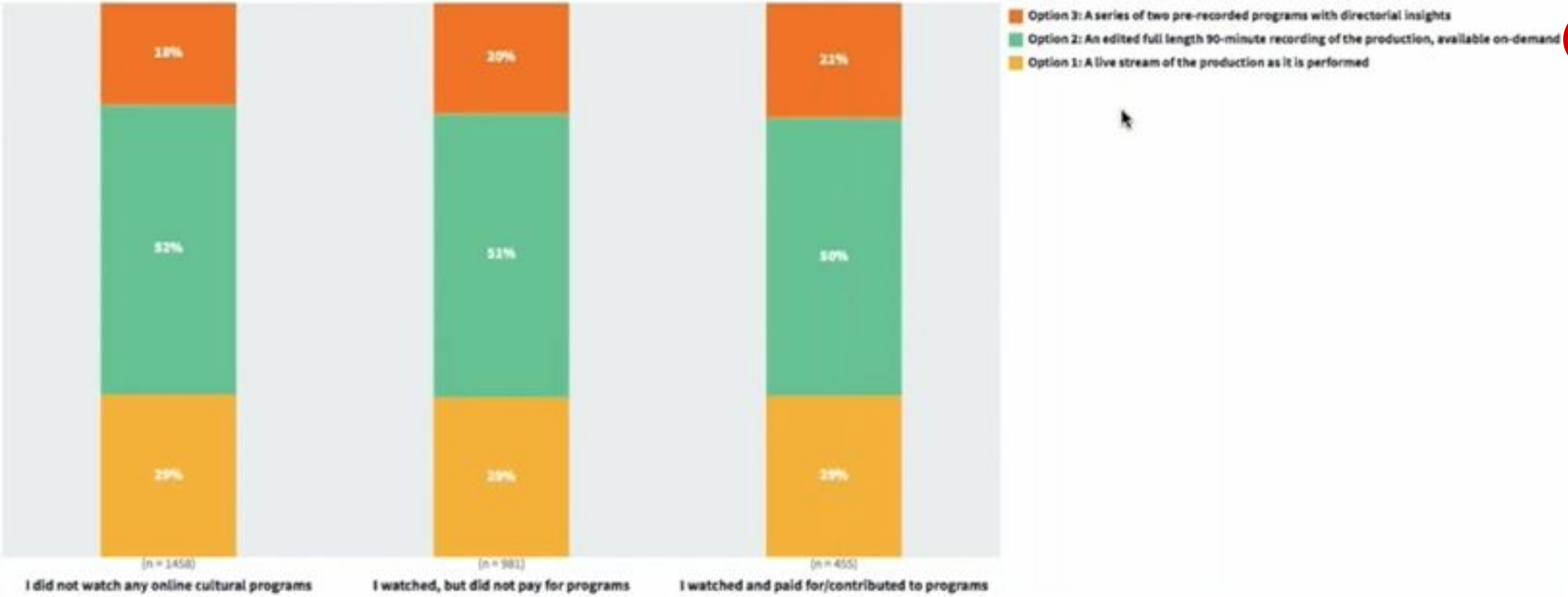


https://www.audienceoutlookmonitor.com/project-updates

Suppose you were offered three options for watching a digital stream of a theatrical production, performed by professional actors. The production consists of two acts, and lasts for about 90 minutes, with intermission. All else being equal, which option would you choose?

This question was only asked of respondents who expressed "high interest" or "some interest" in live streamed or on demand programming in response to the question "What is your overall level of interest in watching the following types of online theatre programs?"

Filter: Watched/Paid for Digital Content in the Past Two Weeks (P3)



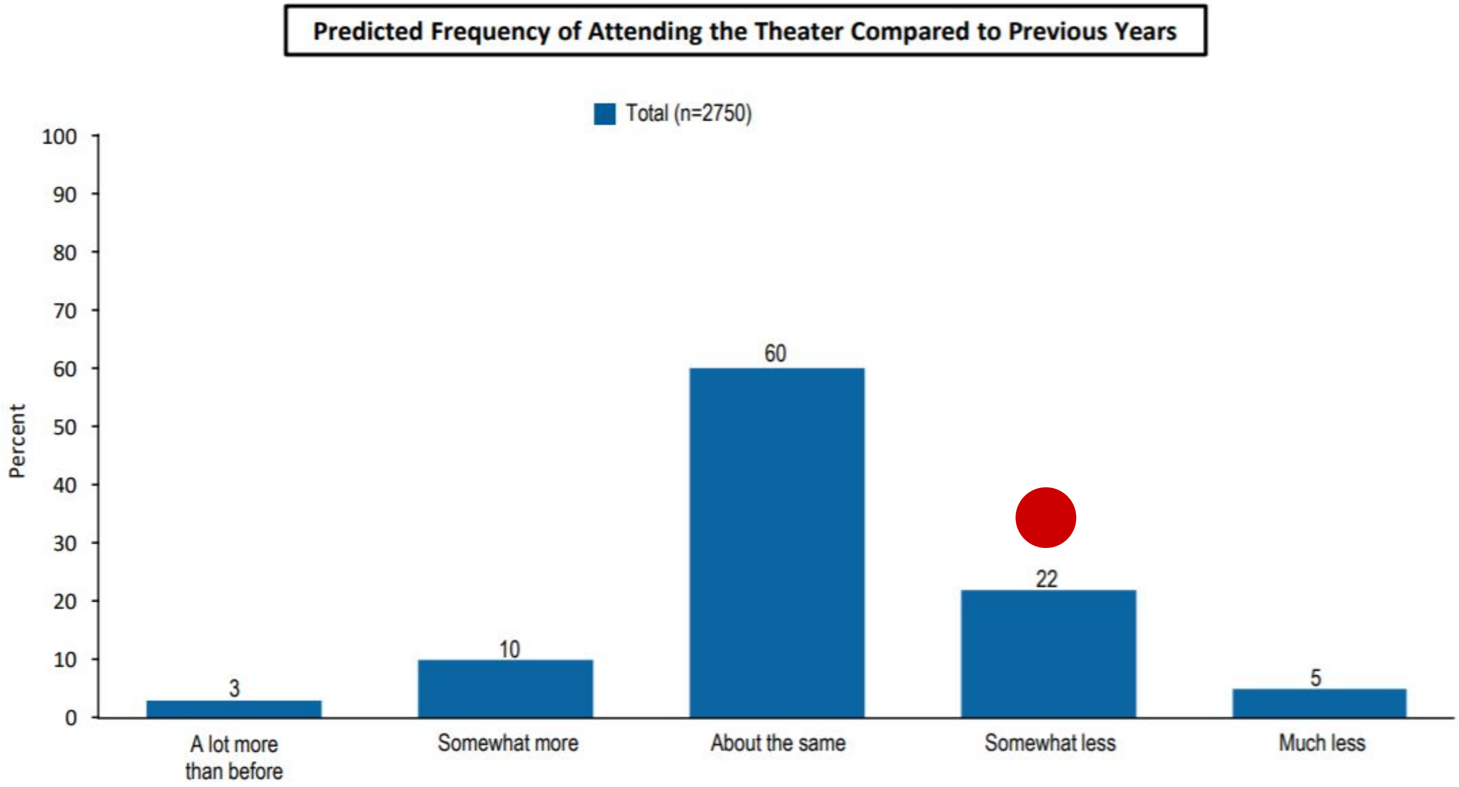
https://titeredata.eu/wp-content/uploads/2020/05/coronavirus-theater-report-washington-dc.pdf

Coronavirus Theater Survey
Quantitative Research Findings

Prepared By:
Shugoll Research
7475 Wisconsin Ave.
Suite 200
Bethesda, MD 20814

April 14, 2020

https://titeredata.eu/wp-content/uploads/2020/05/coronavirus-theater-report-washington-dc.pdf



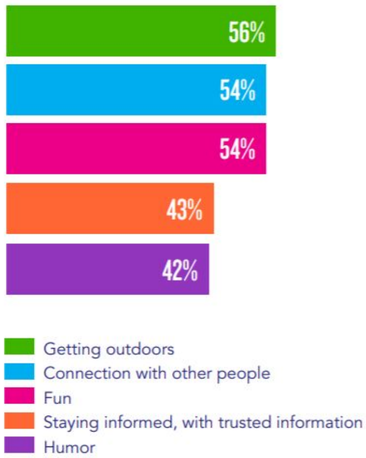
https://culturetrack.com/research/reports/

https://culturetrack.com/research/reports/

Missing Connections

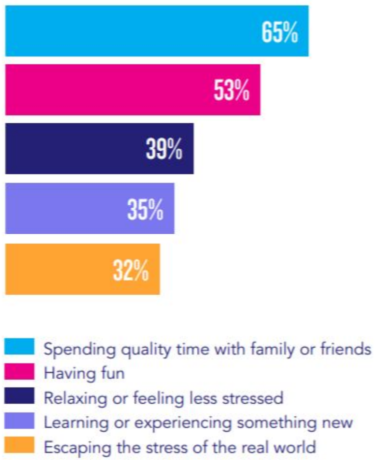
After getting outside, respondents want more connection and fun in their lives—needs that align with what they miss most from cultural experiences.

Q What do you want more of in your life right now? Please check up to five.



***3%** selected none of these.*

Q Now that many of those cultural activities are shut down during the pandemic, what (if anything) do you miss most? Please check up to five.



***5%** selected none of these.*

https://culturetrack.com/research/reports/

Tuning In to Digital Trends

Respondents sample a range of online cultural offerings, of which learning-based activities are seen as particularly valuable.

53% report participating in one or more digital cultural activities.

Q Have you done any of these online or digital cultural activities yourself in the past 30 days? Please check any that apply.

Q How valuable to you personally were those activities?

#1 Pre-COVID recorded performances	60% valuable
#2 Live-stream performances	66% valuable
#3 Online activities for kids	76% valuable
#4 Online classes or workshops	68% valuable
#5 Podcasts	63% valuable

Only top 5 activities are listed. Participation ranged from 17% to 12%.

Five point scale for value. Top two responses are combined.

https://culturetrack.com/research/reports/

What Makes Digital Culture Valuable?

"Almost all [of the online activities I tried] provided a sense of **community** and a strange kind of **intimacy**. There was a sense of **being connected with the world** outside my house and the grocery store."

"Right now, I am looking for **things to do with my children** that allow us to be together and to enjoy something I don't have to organize myself. I want them **to learn and to experience the world.**"

"The activities that were most valuable were those that **helped me accomplish a task or learn something new.**"

"It was a chance to keep in touch with **creativity**, especially when it comes **from artists or places that I admire**. The chance to interact with them is a plus."

Q: What made those activities valuable for you?
What could have made those activities more valuable for you?

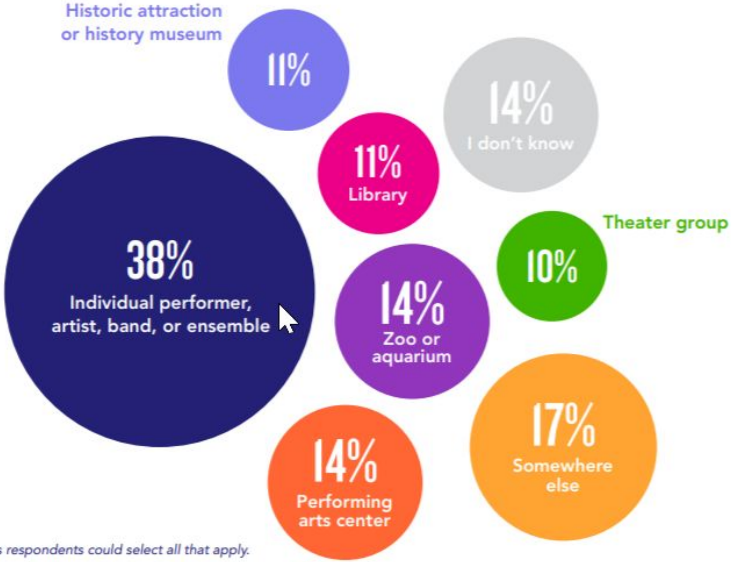
https://culturetrack.com/research/reports/

Looking to Content Creators

Q Were any of the online activities you used offered by the following sources? Please check any that apply.

Respondents access digital cultural content from a variety of sources, with individual performers being the single largest category. Few are paying for online access to culture.

ONLY 13% report paying for access to digital cultural content that they used.



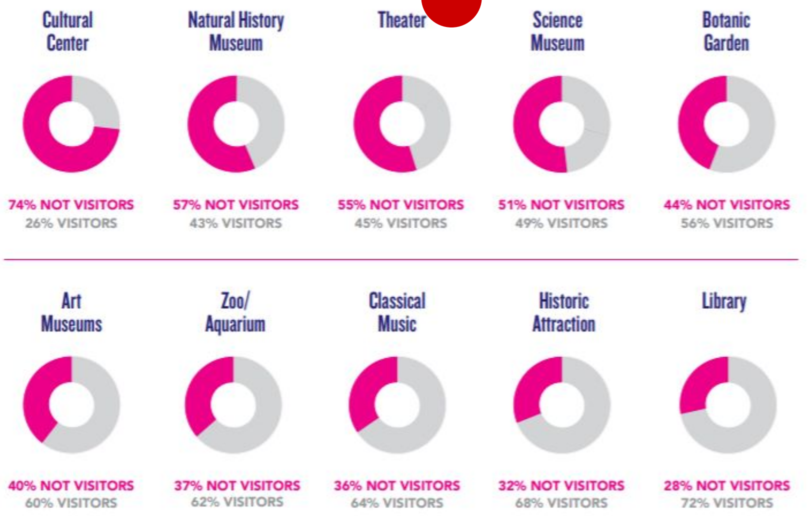
Total exceeds 100% as respondents could select all that apply.

https://culturetrack.com/research/reports/

A Virtual Gateway

Many respondents who are using online cultural offerings had not physically visited the same kinds of cultural organizations in the past year.

Breakdown of Digital Users by Content Category and Prior Visitation



Categories are listed in descending order of non-visitors in the past year.

https://culturetrack.com/research/reports/

Do Digital Offerings Expand Access to Culture?

"I'm disabled, so even COVID-19 aside, I appreciate **digital access to cultural explorations I might not otherwise have.**"

"I hope this kind of **creativity in access and availability** grows in non-pandemic times."

"I was able to participate in activities that I might **not be able to afford financially.**"

"The rapid shift to online programming and digital exhibits from my favorite institutions across the country has allowed me to **participate more and on my own schedule.**"

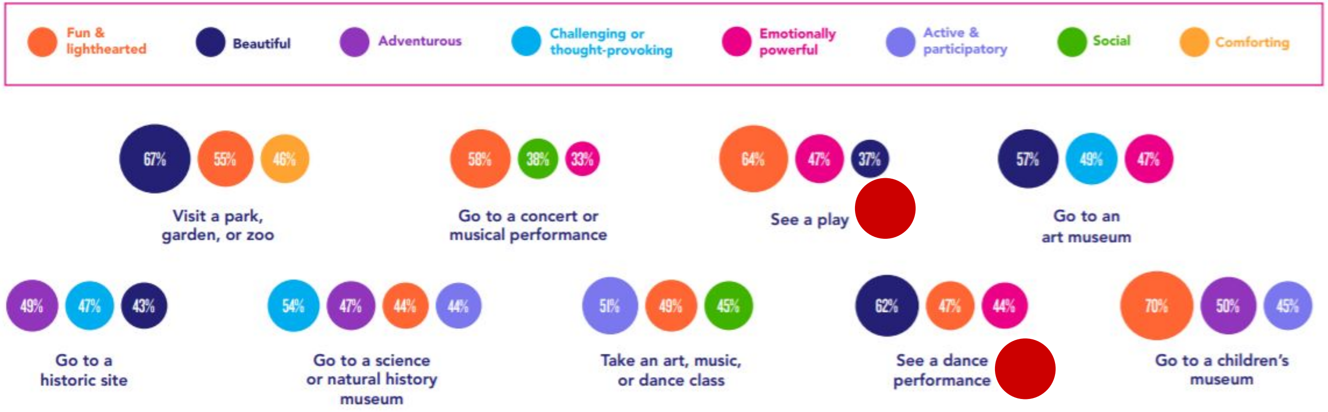
Q: What made those activities valuable for you?
What could have made those activities more valuable for you?

https://culturetrack.com/research/reports/

Play to Emotional Strengths

Q You shared that one of the things you're most excited to do is ______. When you do that again, what qualities will you be looking for most from that experience?

Respondents seek a variety of qualities from different cultural experiences, but activities that are fun, lighthearted, and beautiful appeal most.



Only the top three qualities for each activity are listed unless qualities were tied.

https://culturetrack.com/research/reports/

Who Gets Support

Q What types of causes or organizations have you donated money to in the past 2 years?

Respondents continue to prioritize human services and religious causes and more strongly support health causes since COVID-19.

BEFORE COVID-19

1. Human services*
2. Religion
3. Environment & animals
4. Arts, culture, & humanities
5. Education
6. Health

Giving in 2018–2019.

DURING COVID-19

1. Human services*
2. Religion
3. Health
4. Environment & animals (tie)
4. Arts, culture, & humanities (tie)
5. Education

Giving in 2020. Survey closed on May 19, 2020.

Human services includes poverty, children's services, elderly care, etc.

https://culturetrack.com/research/reports/

The Change Respondents Want to See

Q In general, what kinds of changes would make arts and culture organizations better for you in the future? Please check all that apply.

Respondents indicate a variety of ways cultural organizations could change to be better in the future. 72% selected one or more of these changes.

28% selected "Nothing—I wouldn't change them at all."

Inclusivity and Community

- **24%** Supporting local artists, organizers, etc.
- **24%** Friendlier to all kinds of people
- **20%** Treat their employees fairly and equitably
- **19%** Engage more young people
- **18%** More focus on our local community
- **18%** More diverse voices and faces
- **15%** Working with other nonprofits in our community

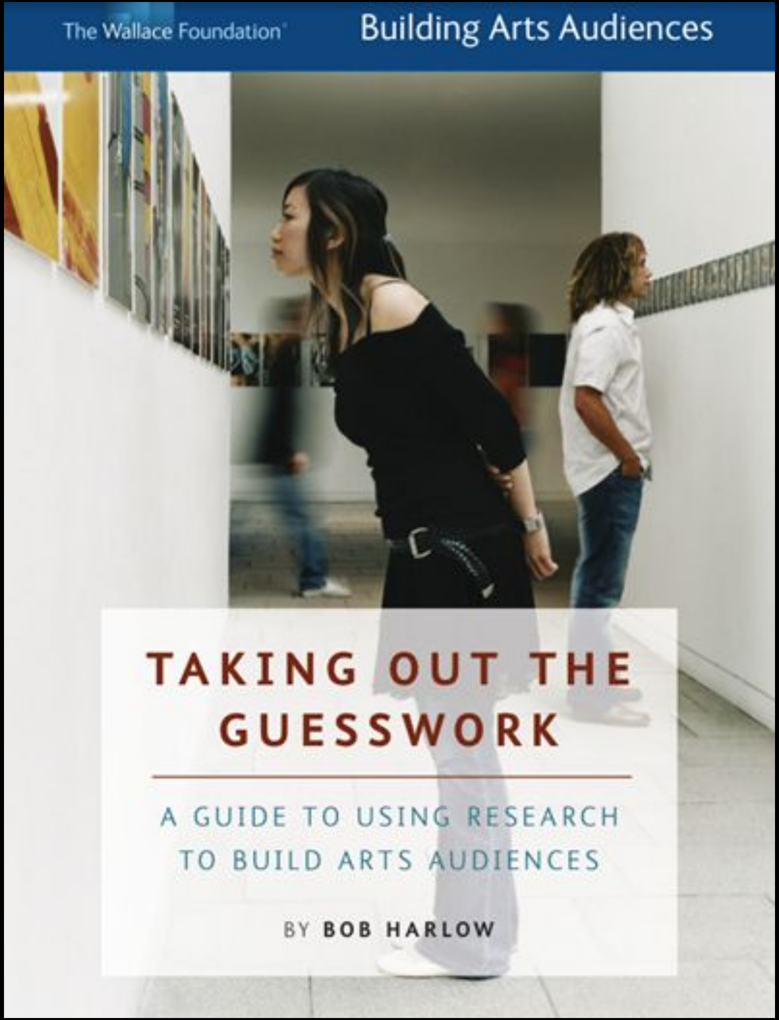
Enjoyment

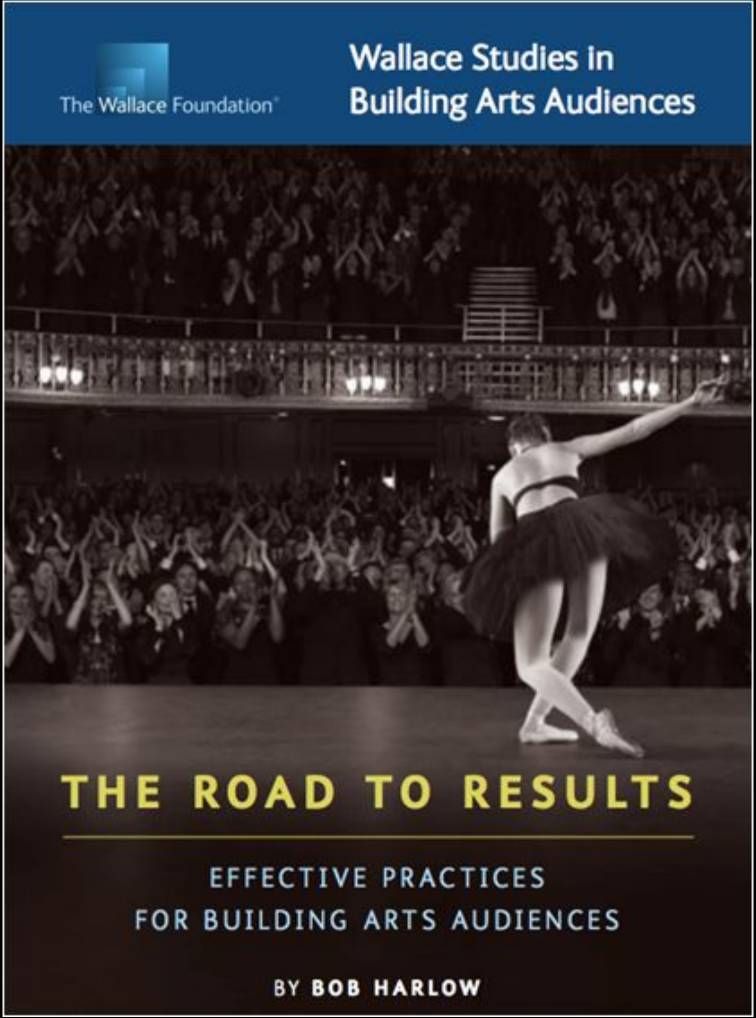
- **28%** More fun
- **17%** Less formal
- **14%** More child-friendly

Reflection and Innovation

- **18%** Stories or content that connect to my life
- **16%** More frequent new works or exhibits

Response patterns were grouped into themes using factor analysis. Total exceeds 100% as respondents could check any that apply.


The Wallace Foundation
Building Arts Audiences
TAKING OUT THE GUESSWORK
A GUIDE TO USING RESEARCH TO BUILD ARTS AUDIENCES
BY BOB HARLOW


The Wallace Foundation
Wallace Studies in Building Arts Audiences
THE ROAD TO RESULTS
EFFECTIVE PRACTICES FOR BUILDING ARTS AUDIENCES
BY BOB HARLOW

https://www.wallacefoundation.org/knowledge-center/pages/arts-organizations-early-response-to-covid-19-uncertainty-insights-from-the-field.aspx


Arts Organizations' Early Response to COVID-19 Uncertainty: Insights from the Field

October 2020

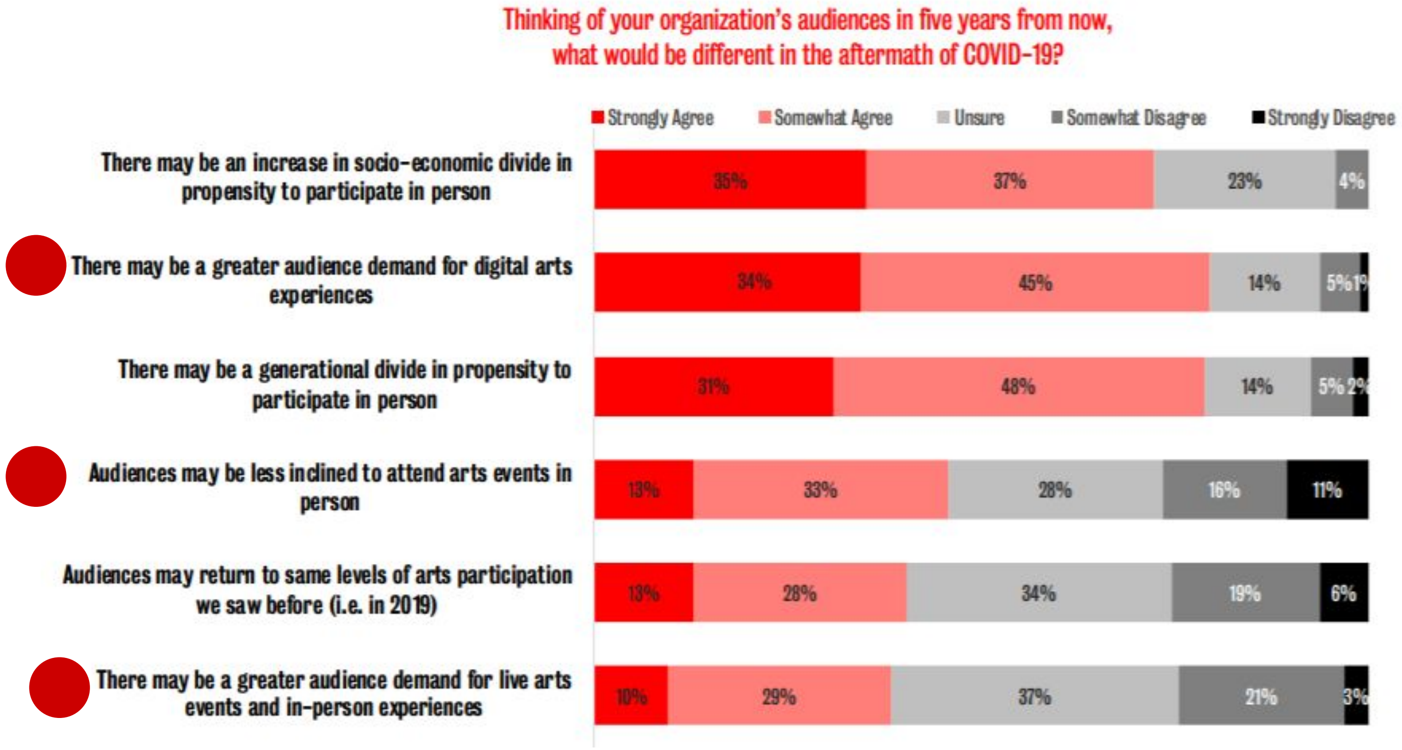
AEA Consulting

Commissioned by The Wallace Foundation

Wallace

https://www.wallacefoundation.org/knowledge-center/pages/arts-organizations-early-response-to-covid-19-uncertainty-insights-from-the-field.aspx

Figure 1 Longer-term impacts of COVID-19 on audience behavior[7]



https://www.wallacefoundation.org/knowledge-center/pages/navigating-uncertain-times-a-scenario-planning-toolkit-for-arts-culture-sector.aspx

Navigating Uncertain Times

A Scenario Planning Toolkit for the Arts & Culture Sector

Detailed Scenarios

October 2020

AEA Consulting

Commissioned by Wallace

https://www.wallacefoundation.org/knowledge-center/pages/navigating-uncertain-times-a-scenario-planning-toolkit-for-arts-culture-sector.aspx

Future States of the World

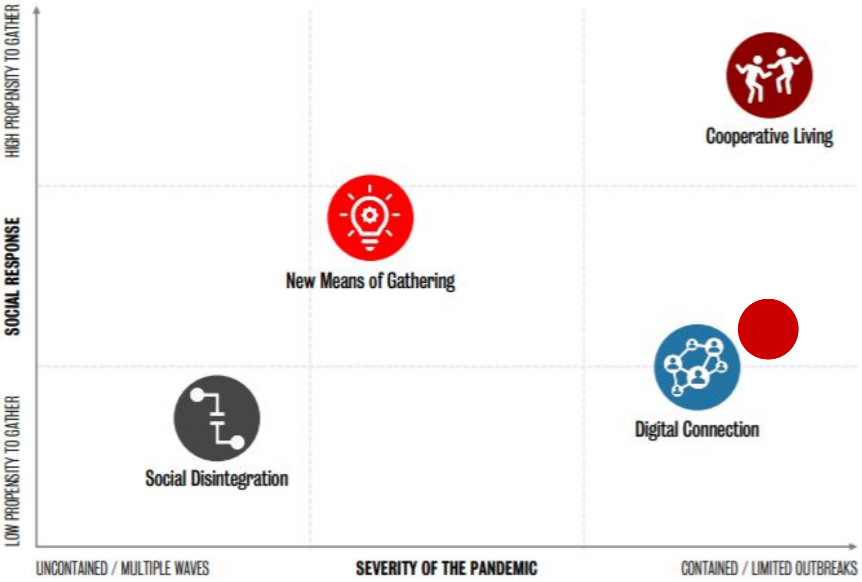
We have plotted four potential future scenarios

1 Cooperative Living
The virus is largely controlled within 12-15 months and focus on social justice grows, creating a new sense of optimism and rush back to the social scene with vigor and enthusiasm

2 New Means of Gathering
A resurgent virus creates significant challenges but, ultimately, deeply ingrained social behaviors persevere in transformed ways

3 Digital Connection
While the COVID-19 pandemic is contained, the threat of future outbreaks leads to continued physical distancing and focus on digital interaction

4 Social Disintegration
Prolonged outbreak of COVID-19 and recurring pandemics from a mutated virus lead to the decline of social life and underlying support systems



https://www.wallacefoundation.org/knowledge-center/pages/navigating-uncertain-times-a-scenario-planning-toolkit-for-arts-culture-sector.aspx

Scenario 3: Digital Connection

Macro Forces

CREATIVITY Arts Economy ↓ Arts Participation ↑

Creative production and consumption shift into the digital world as reality technologies and other forms of digital expression become increasingly popular and affordable.

Streaming services and other forms of digital culture, entertainment and learning thrive, but so do local arts clubs, home-cooking and craft-making.

Design, videogames, software development, etc. dominate while other creative industries are forced to adapt to new behaviors.

ECONOMY Unemployment Rate ↔

Impact on the global economy is smaller than first anticipated, but – in the medium term – hotels, restaurants and tourism experience a major slowdown.

'Distributed' working is normalized and improved by digital and communication technologies.

Government spending is focused on health, innovation and the environment – funding for the arts is reduced and re-distributed with emphasis on digital and local programming.

Philanthropic giving is directed toward wellbeing, the environment and social equity.

SOCIETY Domestic & International Travel ↓

Vaccine distribution is slow and unequal and the psychological impact of the pandemic is pronounced, creating a new sense of fragility that results in a reduced propensity to travel or gather in large groups.

There is enhanced interest in physical and mental health and their connection to the larger social justice and racial equality movements.

Communication is integrated with technology and new platforms enhance experiences – although, this deepens the digital divide as not everyone has equal access.

Travel, especially long-haul, is minimized – business travel becomes largely obsolete and micro/stay-cations become increasingly popular as tourist sites or events can be experienced virtually.

ENVIRONMENT CO2 Emissions ↓

Deepened concern with the climate crisis as research connecting ecological imbalance with the rapid spread of disease, as well as other natural disasters, grows.

Despite the increasing use of technology – or perhaps because of – there is a new appreciation for the power of nature and the outdoors to offer personal rejuvenation and respite from a largely sedentary lifestyle.

TECHNOLOGY Daily Average Screen Time ↑

Technological innovation across industries boosts productivity, but bifurcates more people into digital 'haves' and 'have nots'.

Existing tech giants – and some new entrants – increase in influence.

The importance of digital presence and personality is intensified as social life takes place virtually. Various forms of reality technologies (VR, AR, MR) are normalized in household entertainment.

Biotrackers and wearable technology are popular and affordable ways to keep tabs on physical and mental health.

POLITICS Voter Turnout ↓

The political landscape becomes increasingly fragmented as new political ideas, ideologies and conspiracy theories proliferate in the digital sphere.

There is a wave of nationalist sentiment as economic and technological competition between the "East" and "West" is intensified.

New communication technology encourages deep collaboration at individual and institutional levels, while a sense of local community is also deepened.

https://www.wallacefoundation.org/knowledge-center/pages/navigating-uncertain-times-a-scenario-planning-toolkit-for-arts-culture-sector.aspx

Scenario 3: Digital Connection
Arts & Culture Sector Indicators

	Decrease / Pre-COVID-19 Baseline / Increase	
In-person attendance		In-person attendance decreases significantly as audiences are wary of unnecessary gathering, especially in large groups. Cultural infrastructure is re-designed, re-purposed, reduced in scale and leased or sold in response to these changes.
Digital consumption		Digital consumption increases exponentially as audiences spend more time in the home and seek new ways to connect, although some audiences get left behind.
Audience diversity		Diversity increases marginally as digital programs focus increasingly on scale and costs are reduced; however, those without high-speed internet connections or access to new technologies are increasingly left behind.
Employment		Employment in the arts and culture sector contracts as attendance to physical infrastructure reduces, but new remote roles, especially in digital and technology, simultaneously grow.
New work created		There is an increase in the volume of artistic work created and published by new creators on social media and new digital platforms.
Producing organizations		An increase in production is focused on digital content most suitable for streaming and at-home access.
Earned income		Income generation direct from audiences and from sponsors increases as digital programs expand total users and paid for online events are normalized.
Individual philanthropic giving		In acknowledgement of the challenges and uncertainty facing arts organizations – and the moral support that they provide audiences – individual supporters are more inclined to donate to presenters and producers that they admire.
Organized philanthropic giving		Overall support for the arts from organized philanthropic organizations (trusts, foundations, etc.) decreases as funds are directed toward other causes, primarily health and wellbeing, the environment and social justice.
Government funding		Government spending is focused on health, innovation and the environment as overall funding for the arts is reduced.

https://www.wallacefoundation.org/knowledge-center/pages/navigating-uncertain-times-a-scenario-planning-toolkit-for-arts-culture-sector.aspx

Scenario 3: Digital Connection

Arts & Culture Sector SWOT Analysis

STRENGTHS

- Rapid innovation in cultural offerings and modes of consumption as growth in the digital economy leads to a proliferation of 'next generation' arts and culture organizations.
- The arts are increasingly 'democratized' as accessibility is increased via digital technology and some audiences diversify.
- Flexible working opportunities are enabled by enhanced digital and communication technologies, creating new ways of working for artists and organizations.
- Increased concern with collective wellbeing and the environment lead to new sustainability practices and shift focus away from exponential growth toward quality and social impact.

WEAKNESSES

- Reduced propensity to gather in large groups and continued social distancing practices significantly impact visitation to arts and cultural destinations – organizations are forced to adapt or risk permanent closure.
- Reduction in global travel impacts the "event economy" and attendance to major heritage sites, tourist destinations, events and festivals.
- The physical design of traditional arts buildings are inefficient for new social norms and distancing measures.
- Funding for the arts is shifted away from legacy institutions based on changing patterns of consumption.
- Minimal opportunity to connect to audiences without internet access.

OPPORTUNITIES

- New technologies and markets for digital consumption develop rapidly as new social platforms and reality technologies are popularized – the arts and culture sector have the opportunity to lead the way in content development.
- New funding opportunities emerge especially for digital and local programming and organizations that can demonstrate impacts on health, wellbeing and social justice.
- Opportunities for outreach to new, diverse staff and Board to lead to digital futures.
- Collaboration and co-creation of new content digitally and in local communities.
- Increased demand for creativity in the home e.g. painting, musical instruments, creative learning, reading and writing supports growth in these sectors.
- Growth in digital and creative learning as more time is spent at home.

THREATS

- Visitation to traditional, location-based events and experiences is significantly reduced forcing arts and culture institutions to re-think their business models.
- Increasingly challenging and competitive funding environment for the arts as social impact (especially health, wellbeing and social justice) is prioritized.
- Arts and culture struggle to compete with digital offerings of large corporate tech firms as the fight over audiences' digital attention span intensifies.
- Organizations without existing digital production capabilities (or the resources to quickly develop them) have reduced opportunities.
- Value and appreciation of material culture is threatened as the world moves more and more into the digital sphere.

https://www.wallacefoundation.org/knowledge-center/pages/navigating-uncertain-times-a-scenario-planning-toolkit-for-arts-culture-sector.aspx

Scenario 3: Digital Connection

Arts & Culture Sector Stakeholder Impact

Individual artists	Individual artists continue to produce work and explore new mediums and forms of expression. Group works are more challenging to produce but collaboration continues through digital means. Corporate sponsorship of artists as influencers increases as they grow their digital audiences.
Arts organizations	There are closures among arts organizations of all types and size but especially mid-size organizations without the reserves or government support to persevere, nor the agility to transform to the new environment. Those that thrive are those that can develop meaningful digital initiatives at speed.
Arts educators	Interest in formal and informal arts education initiatives is strong but there is a shift toward new technologies and forms of expression. The division between art, innovation and technology diminishes and education curriculum reflects this.
Visual arts	The art market is rocked by a short-term slump in sales and high turnover of small galleries. It rebounds as online fairs and exhibitions become the norm. Museums reduce their physical footprint and opening hours while enhancing digital presence. Local museums and "open houses" for collectors become popularized.
Performing arts	In-person attendance to performances is restricted to small, local audiences but streaming platforms offer new opportunities for collaboration, revenue generation and audience engagement. The appeal of the "live" performance persists as people tune in from home to experience new performances together.
Other cultural activities e.g. literature / science / history	Science, history and other educational institutions re-direct resources and collaborate to produce new and engaging digital content (VR, podcasts, etc.). Some re-focus their missions toward social justice and racial equity.
Creative industries e.g. film / fashion / architecture	The creative industries experience a slowdown initially as the operating environment shifts but prove to be highly adaptive and growth continues. Software developers and designers are the big winners, but new products and services emerge across sectors to address new customer concerns.
Individual philanthropy	Individual philanthropy decreases in the short-term due to high levels of uncertainty but slowly grow again to pre-COVID levels. Support for the arts is facilitated through online platforms to support both individual artists and organizations.
Organized philanthropy	In total, organized philanthropy remains constant but funding priorities shift toward social justice, healthcare and the climate crisis. Support for the arts is contingent upon its impact on these sectors being clearly measured and articulated.
Cultural infrastructure	The need and desire for large-scale cultural infrastructure is drastically diminished as work is conducted remotely and arts are presented primarily online. Organizations attempt to re-purpose, reduce in size and lease or sell real estate, often at a loss.

https://jcainc.com/blog/archive/tab-digital-performances/

JCArts Marketing

TRENDS IN AUDIENCE BEHAVIOR

Digital Performances in Their Infancy

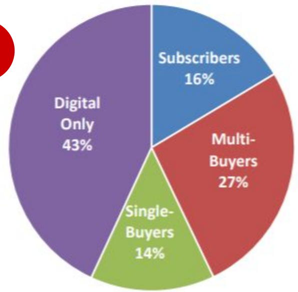
An analysis of audiences for digital performances in 2020.

Created by JCA Arts Marketing

Reaching New Audiences

Across all organizations, **43% of digital ticket buyers had never purchased a ticket for an in-person performance**, and an additional 14% of buyers had only ever attended in person once.

Number of Bookers



https://www.colleendilen.com/category/covid-19-updates/

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know your own bone

Executive Leadership Business Insights Marketing New Audiences Visitor Experience Fundraising & Membership COVID-19 Updates

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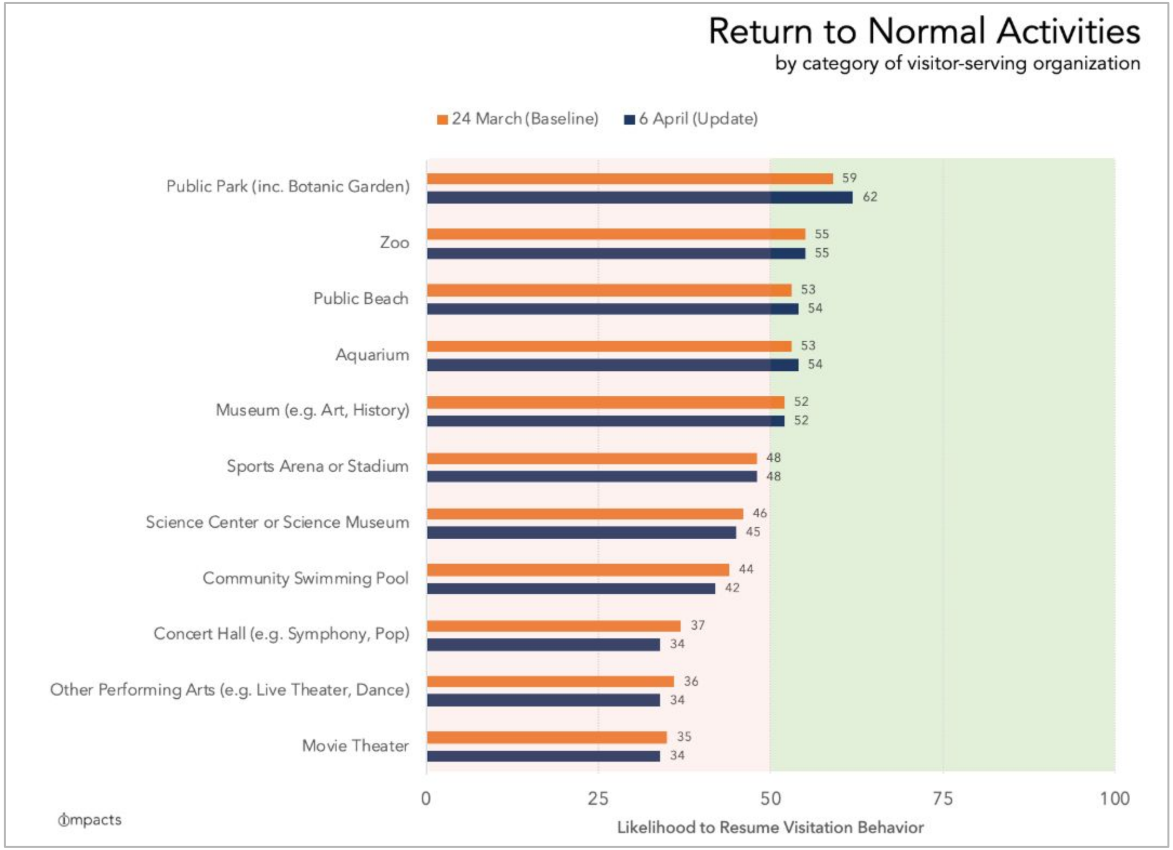
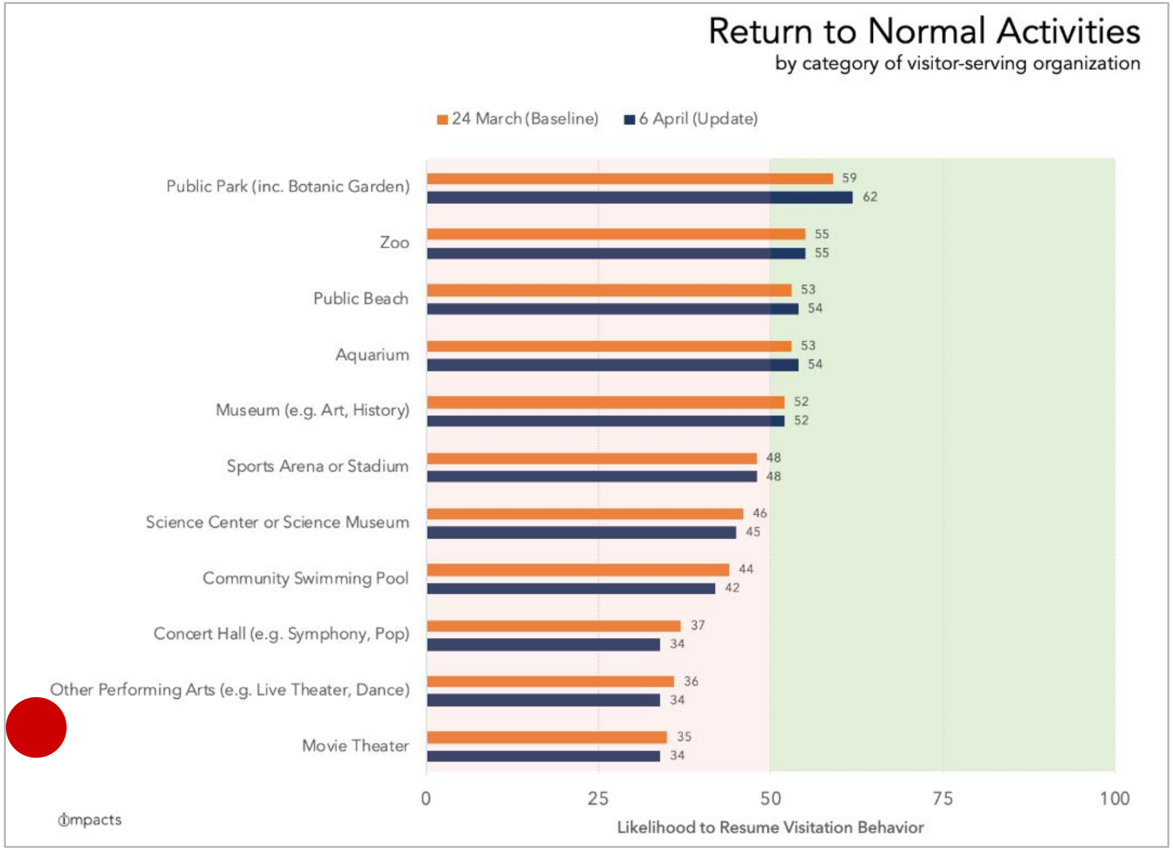


1. **Cultural experiences that allow for a visitor's relative freedom of movement – and particularly those that feature outdoor spaces – will likely benefit from increased demand.** This includes outdoor historic sites, parks, zoos, botanic gardens, etc.
2. **Experiences involving enclosed spaces with minimal visitor movement – such as performing arts enterprises – indicate lessened demand.**
3. **Entities perceptually offering tactile experiences – such as science centers – are also at risk in terms of immediately regaining their typical visitor volume.**
4. **How susceptible people believe they are to the virus may play an important role in their attendance decisions.** Symphony audiences tend to be comparatively older and thus may be more concerned about contracting the virus.

https://www.colleendilen.com/category/covid-19-updates/



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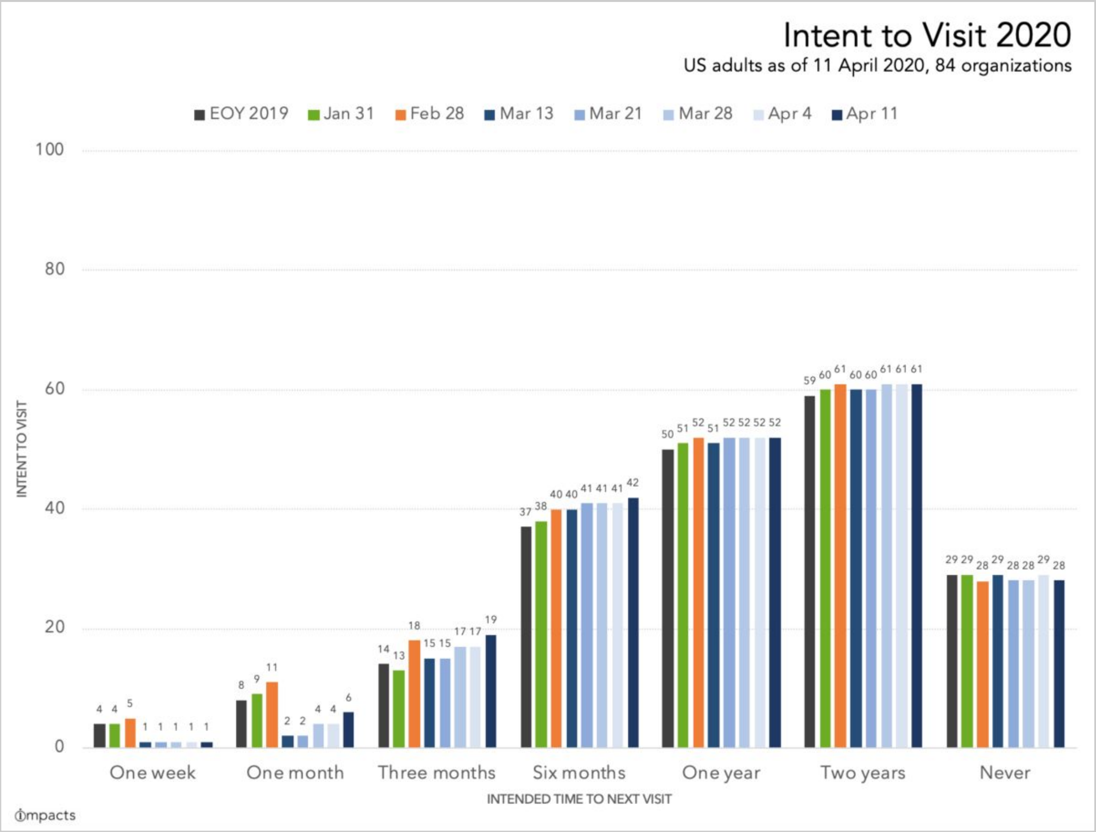

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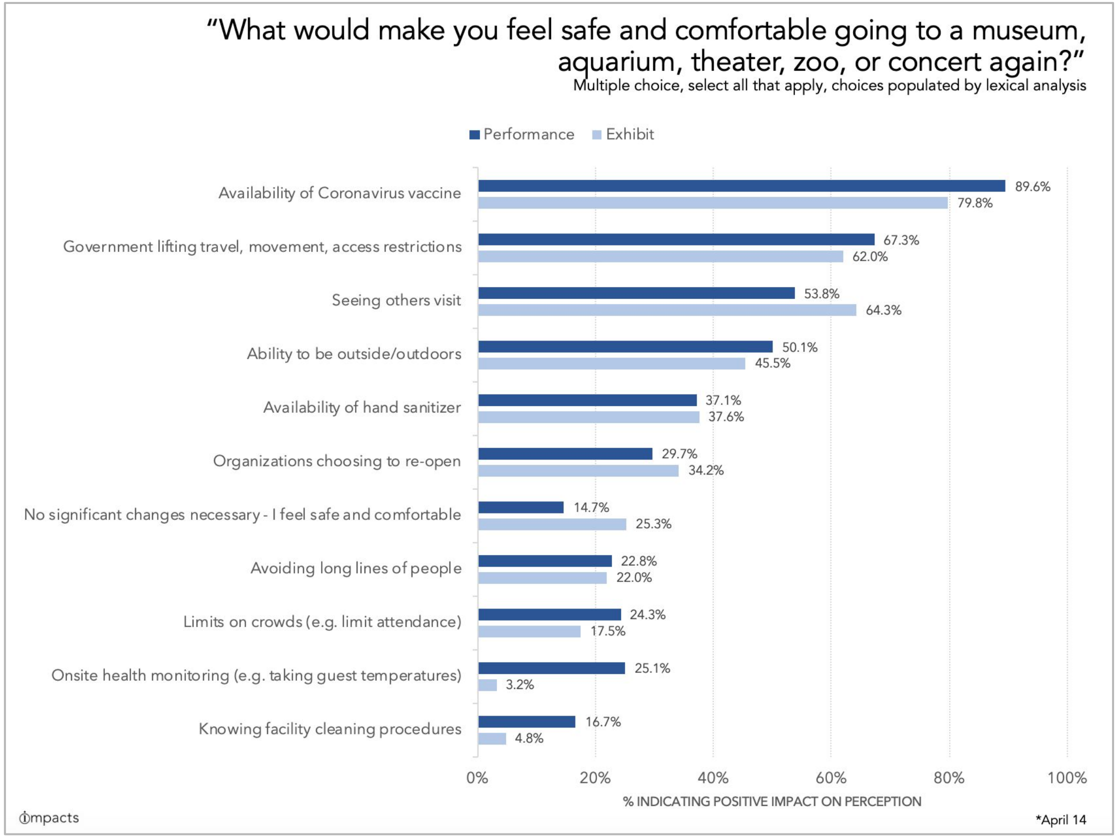
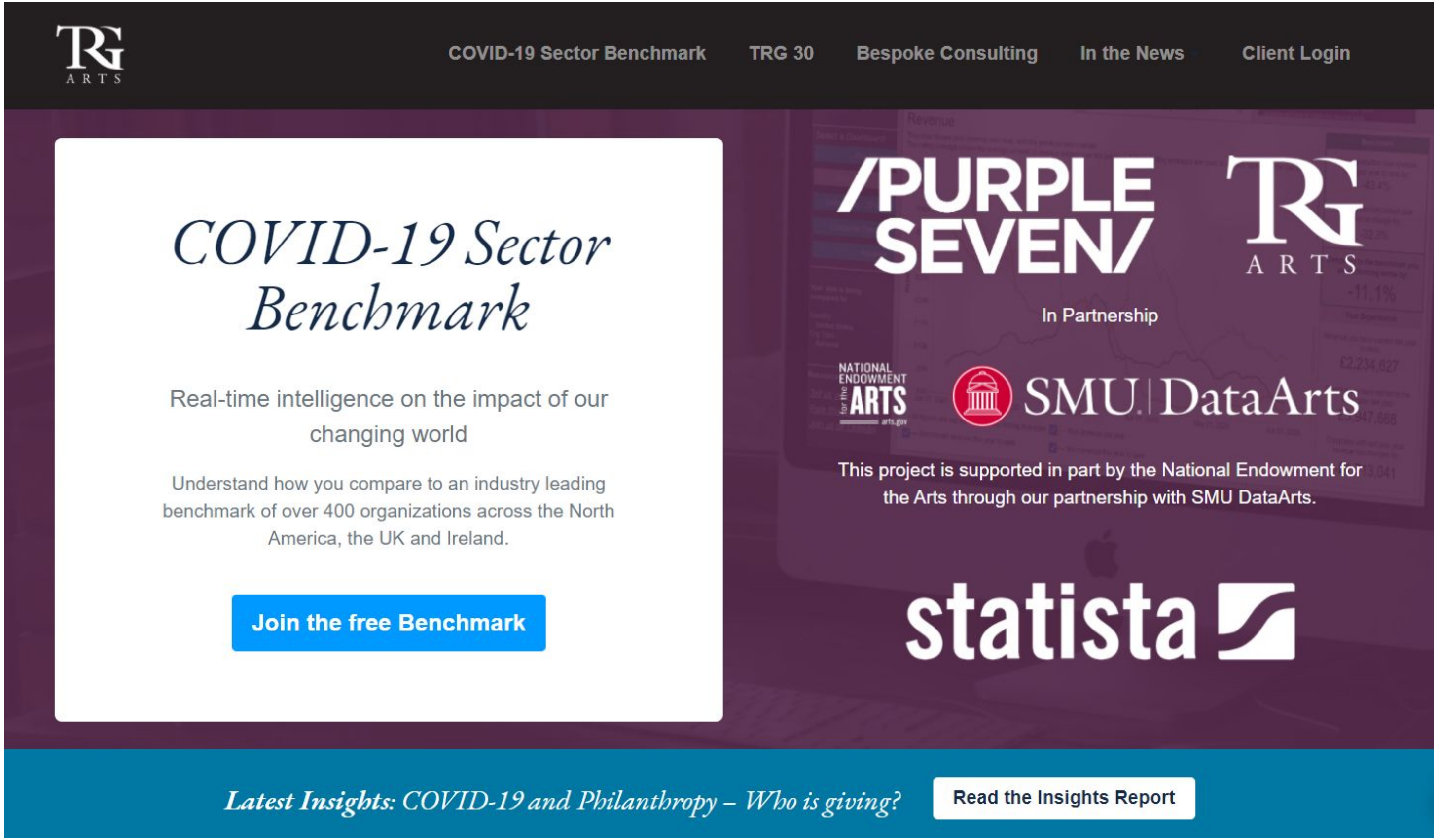


https://trgartsresiliency.com/benchmark



https://www.pec.ac.uk/assets/publications/Cultural-consumption-study-week-6.pdf

Creative Industries
Policy & Evidence Centre
Led by nesta

Digital Culture
Consumer Tracking Study

WAVE 6 OF 6 | JUNE 2020

Intellectual Property Office

AUDIENCE NET

Overview

Time consuming daily

After some declines in the median amount of time spent consuming content per day, online or offline, two of the categories (music and TV) bounced back somewhat in week 6. For film, video games, books, magazines and audiobooks, there were no changes in week 6. TV continued to have the highest median time across categories (3.3 hours per day).

Levels of downloading, streaming, accessing

Week 6 saw no notable changes compared to week 5 in the proportions downloading, streaming and accessing any of the categories.

Physical purchasing

Physical purchasing, like most other consumption methods, saw a peak in week 2 across all categories. Despite declines in the following weeks, some categories saw a slight increase in week 6 and most remained notably higher than the levels seen at the start of the study (i.e. week 1).

Legal and illegal sources

The use of illegal downloading, accessing or streaming methods has fluctuated, however for most categories, on the whole, it has declined over the course of the study. Illegal streaming levels were notably lower than for illegal downloading. There were marginal changes from week 5 to week 6 for most categories, however for magazines the level of illegal accessing/downloading increased by 10 percentage points and for audiobooks by a significant 16 percentage points.

Other content categories

For other content categories, there were no significant changes when comparing total weekly consumption in week 6 to week 5.

Looking across all the weeks to date for total weekly consumption, 9 out of the 17 categories have shown a general decline to the point where they are significantly below their highest points, which were seen in week 1 or 2. The remaining categories have only seen marginal changes. In some categories the decline is relatively small in relation to their base number of content consumers, but for others with a smaller base, the decline is much more significant.

Wellbeing and lifestyle

Wellbeing measures saw only marginal changes from week 5 to week 6. However, the level of anxiety ("how anxious did you feel yesterday?") has declined in most weeks - including week 5 to week 6 - and is now significantly lower than the highpoint in week 1. Feelings of life being worthwhile have also significantly shifted downwards from weeks 1 to 6.

The percentage of people who reported having changed their work/lifestyle owing to COVID-19 measures was consistent with the percentage in week 5, except for the proportion self-isolating, which fell significantly by 2 percentage points to 3%. This measure is also the only one to have significantly changed since the start of the study https://www.indigo-ltd.com/covid-19-after-the-interval-national-audience-survey

indigo

After the Interval

National Audience Research

Audience views on returning to live cultural events, booking tickets now and in the future, and missing out on events during lockdown.

Wave 2 | 7-27 May 2020

Katy Raines
Co-founder and Partner
www.indigo-ltd.com

indigo

Act 2

National Audience Research

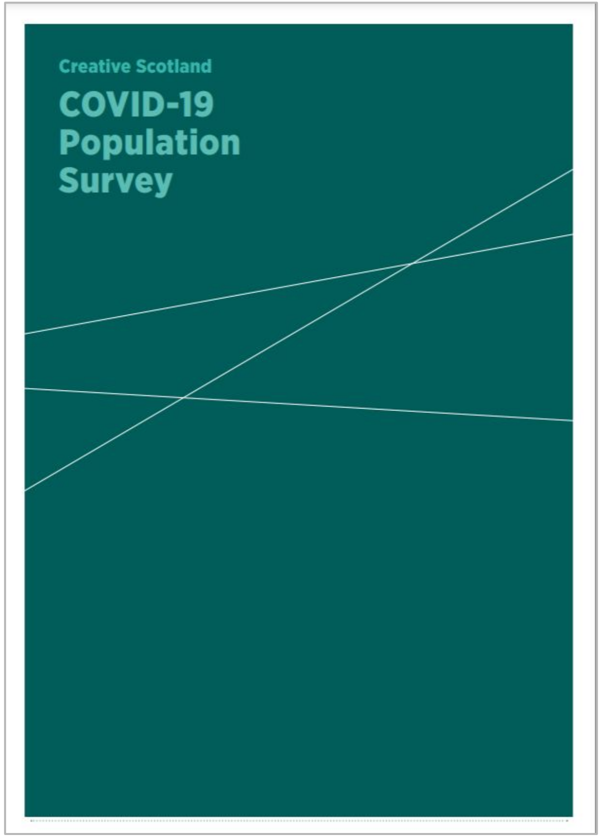
Audience views on booking tickets now, returning to live cultural events with social distancing, and experiencing culture in different formats.

Wave 2 | 22 June – 15 July 2020

Katy Raines
Co-founder and Partner
www.indigo-ltd.com

https://www.indigo-ltd.com/covid-19-after-the-interval-national-audience-survey

https://www.creativescotland.com/__data/assets/pdf_file/0007/84787/covid-summary-final.pdf


Creative Scotland

COVID-19
Population
Survey

https://www.creativescotland.com/__data/assets/pdf_file/0007/84787/covid-summary-final.pdf

Figure 3: Thinking about how you feel at the moment, how likely would you be to do this type of activity?

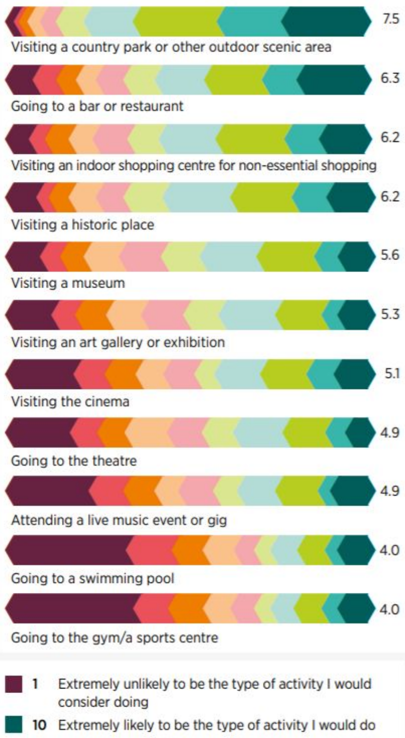


Figure 4: Which, if any, of the following best describes when you would feel happy to do this type of activity?

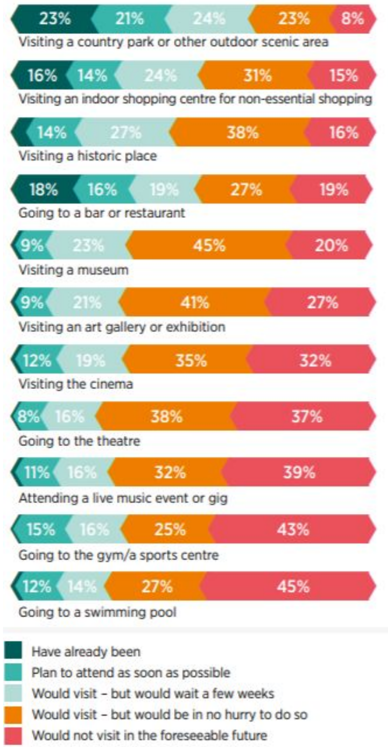
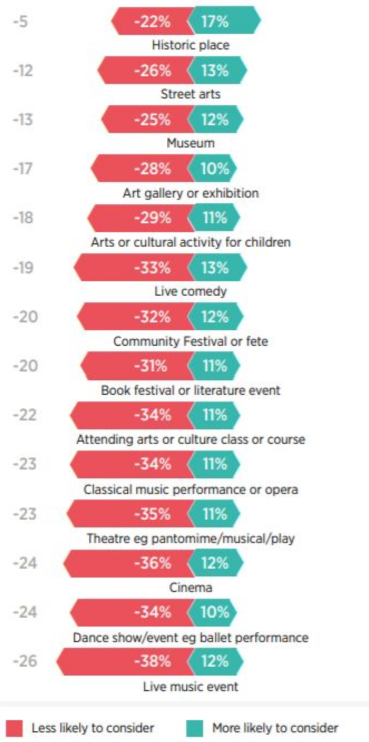


Figure 5: How have your preferences changed compared with what you might have chosen to do before the COVID-19 outbreak?

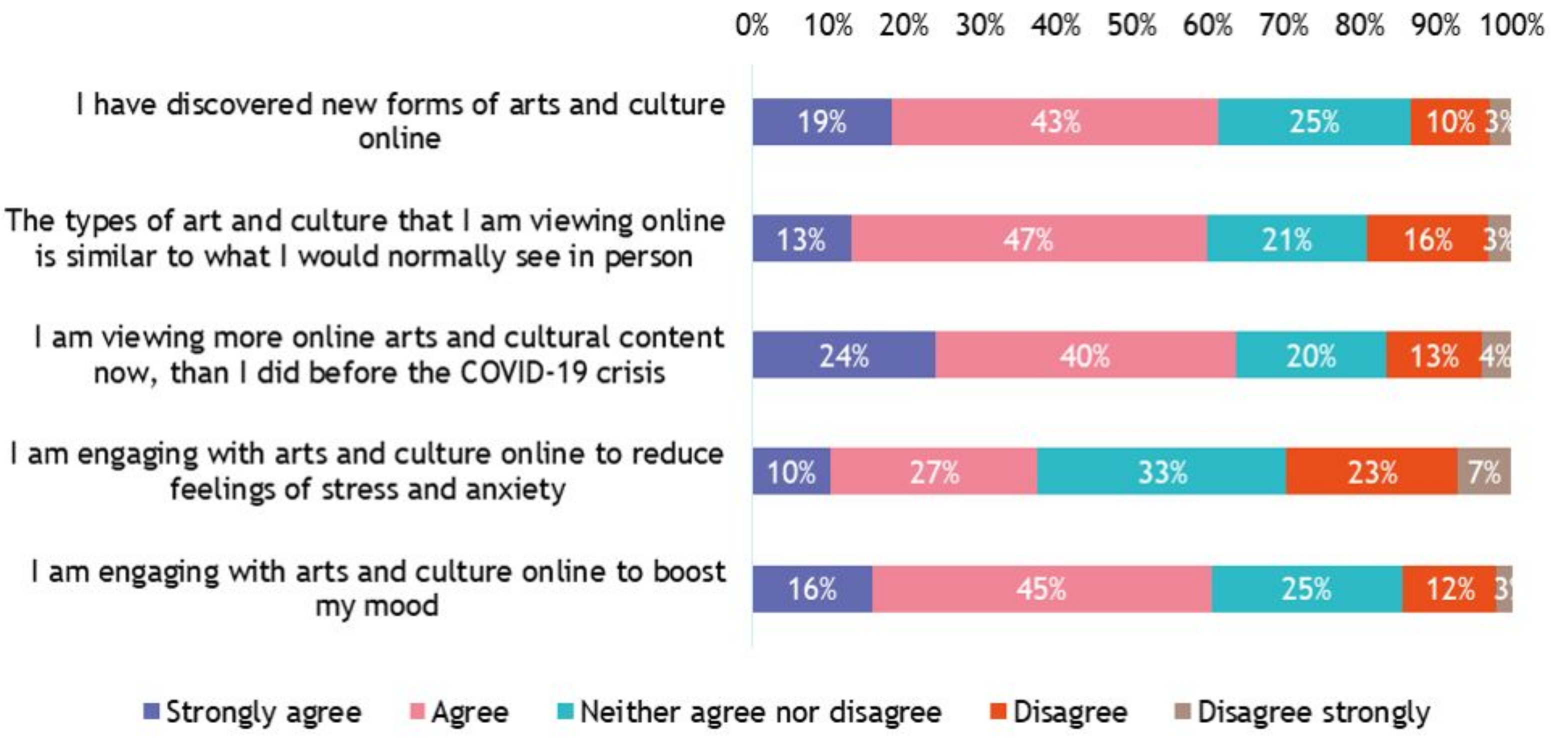


https://www.theaudienceagency.org/resources/developing-audiences/covidculture

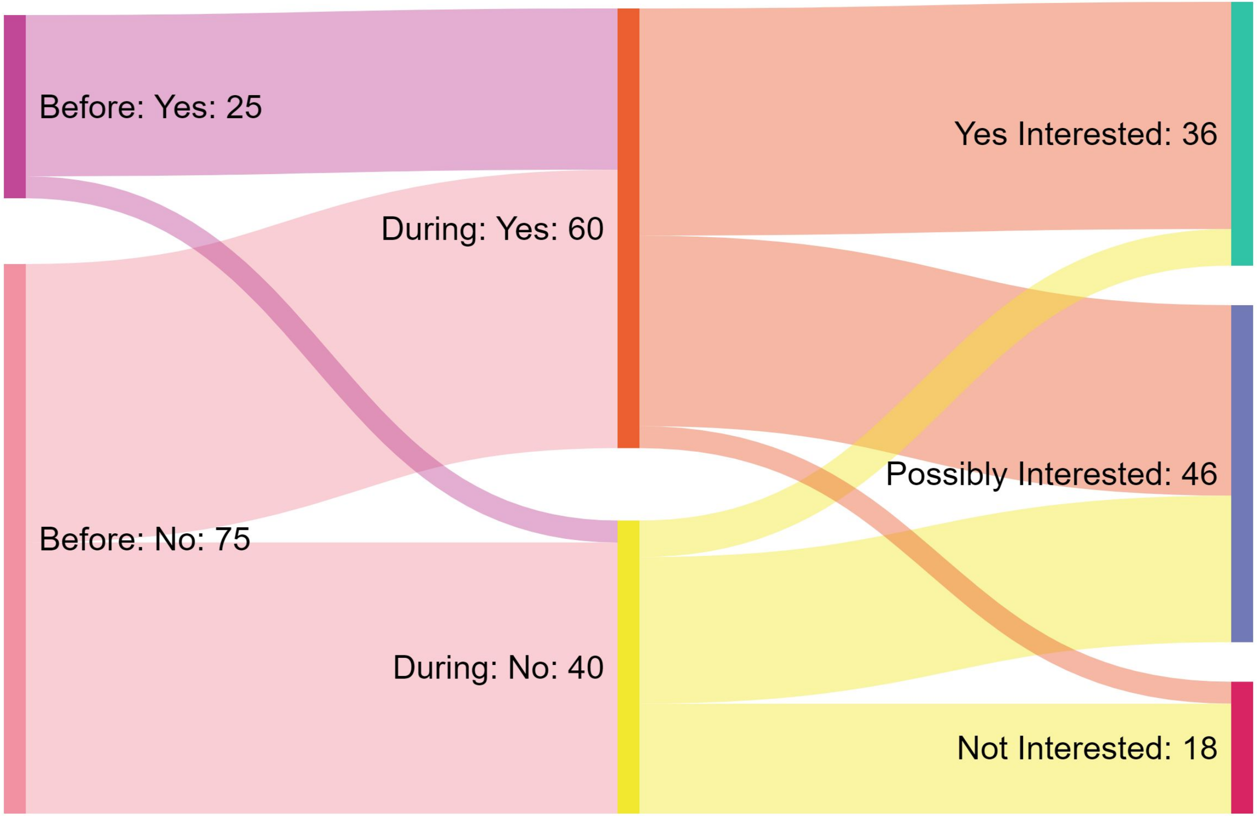
COVID-19 | CovidCulture

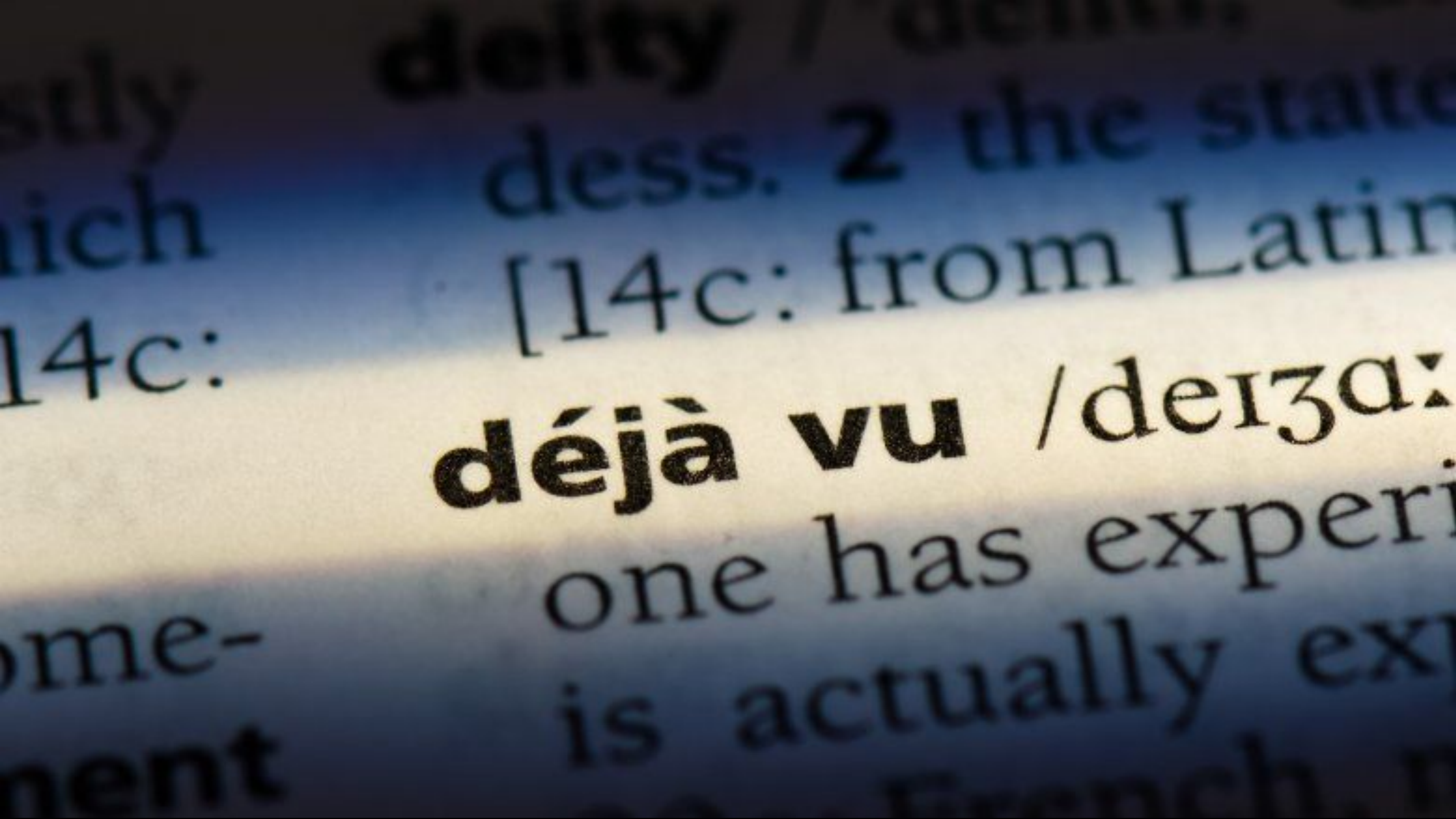
Arts Professional's dedicated micro-site for all the news and more on how the coronavirus is affecting the cultural sector.

https://www.theaudienceagency.org/bouncing-forwards-digital-audience-survey-findings



https://www.theaudienceagency.org/bouncing-forwards-evidence-hub-interpreting-the-evidence-act-two-survey

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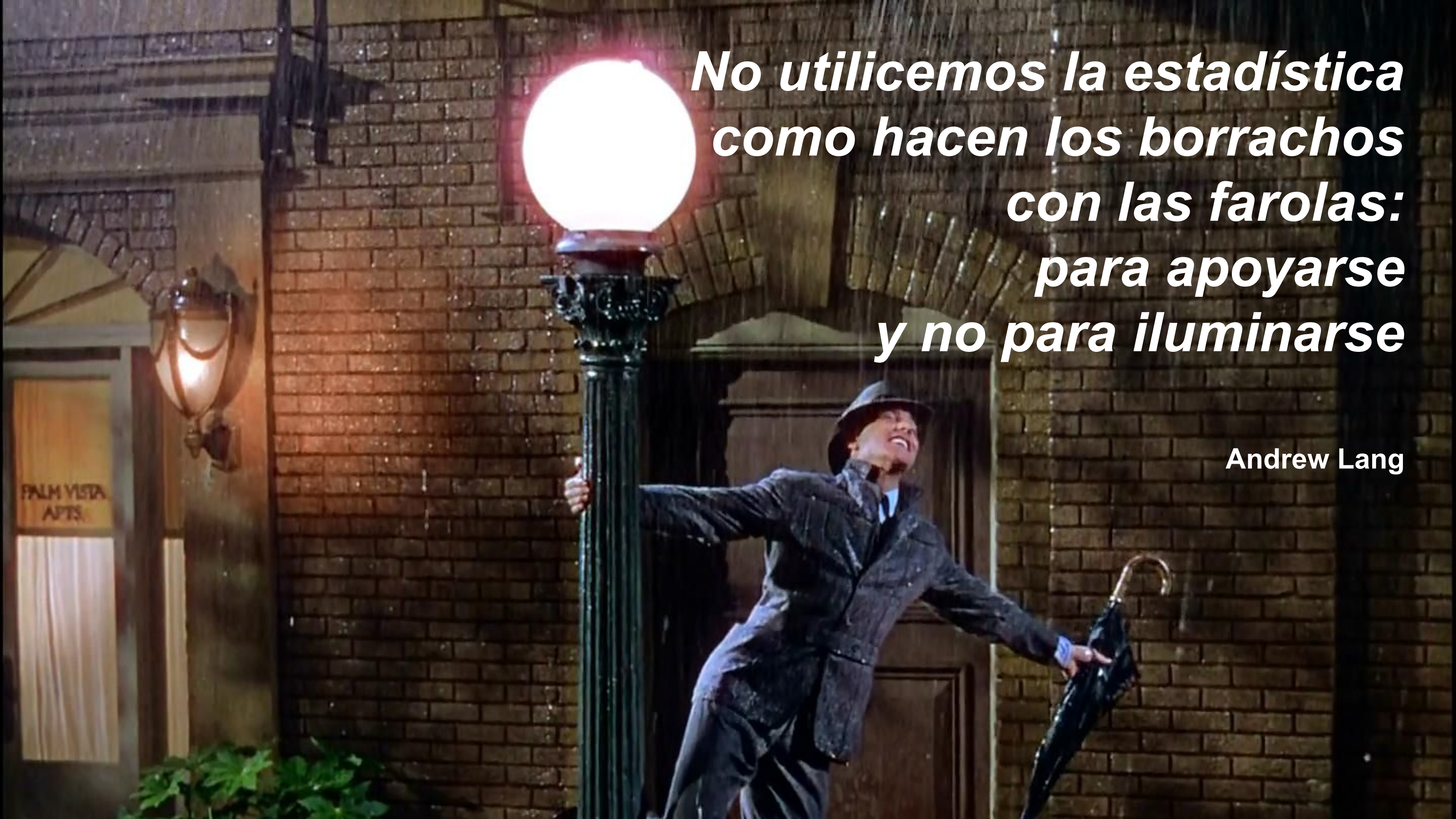
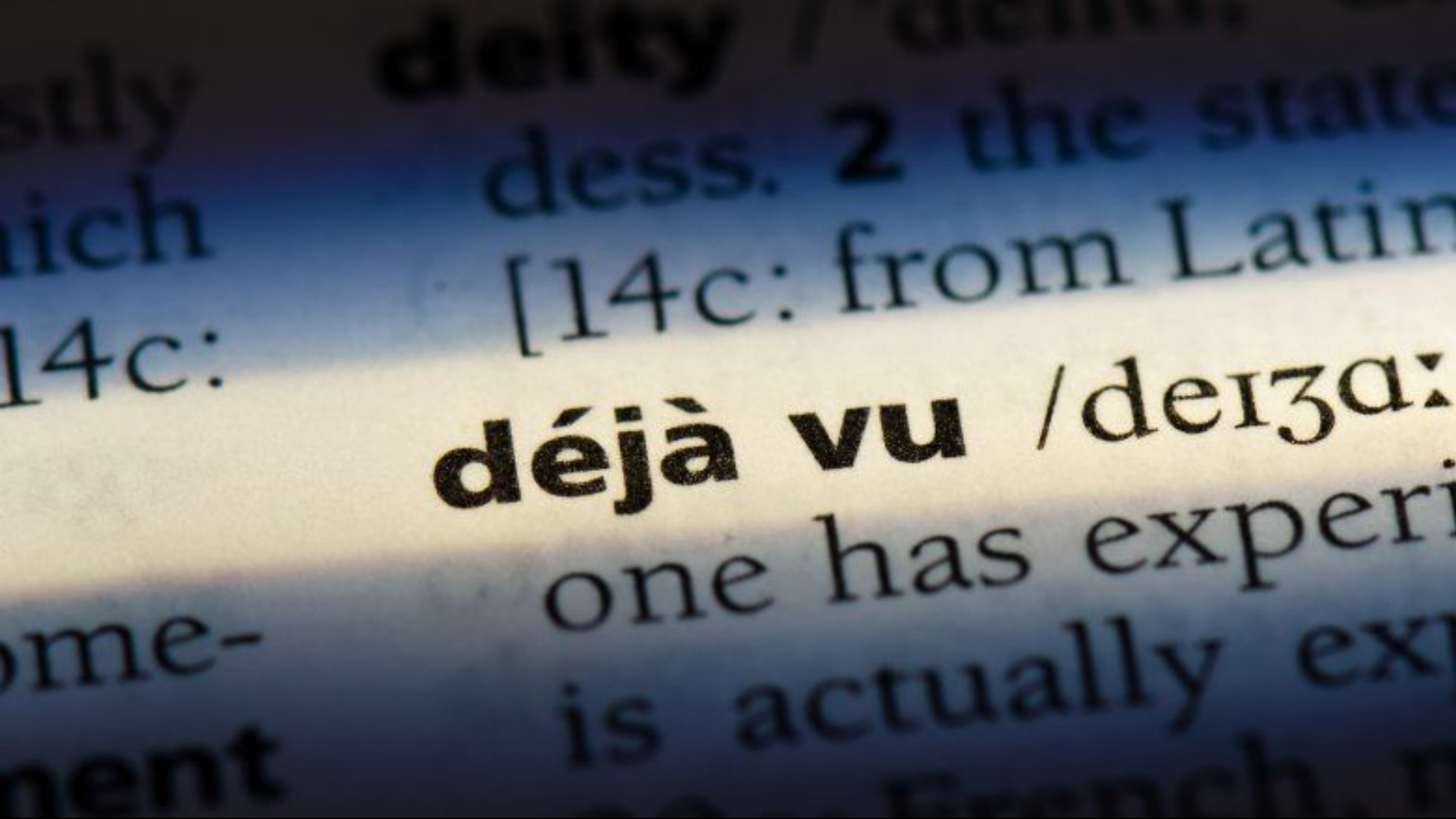

No utilicemos la estadística
como hacen los borrachos
con las farolas:
para apoyarse
y no para iluminarse
Andrew Lang
PALM VISTA
APTS.


Why?
Why this?
Why not?
Centre for Contemporary Art
Centrum současného umění
793
1


'THERE
IS NO DIGITAL
STRATEGY
JUST STRATEGY IN
A DIGITAL
WORLD'
-BUD CADDELL | CONSULTANT / SPEAKER / BLOGGER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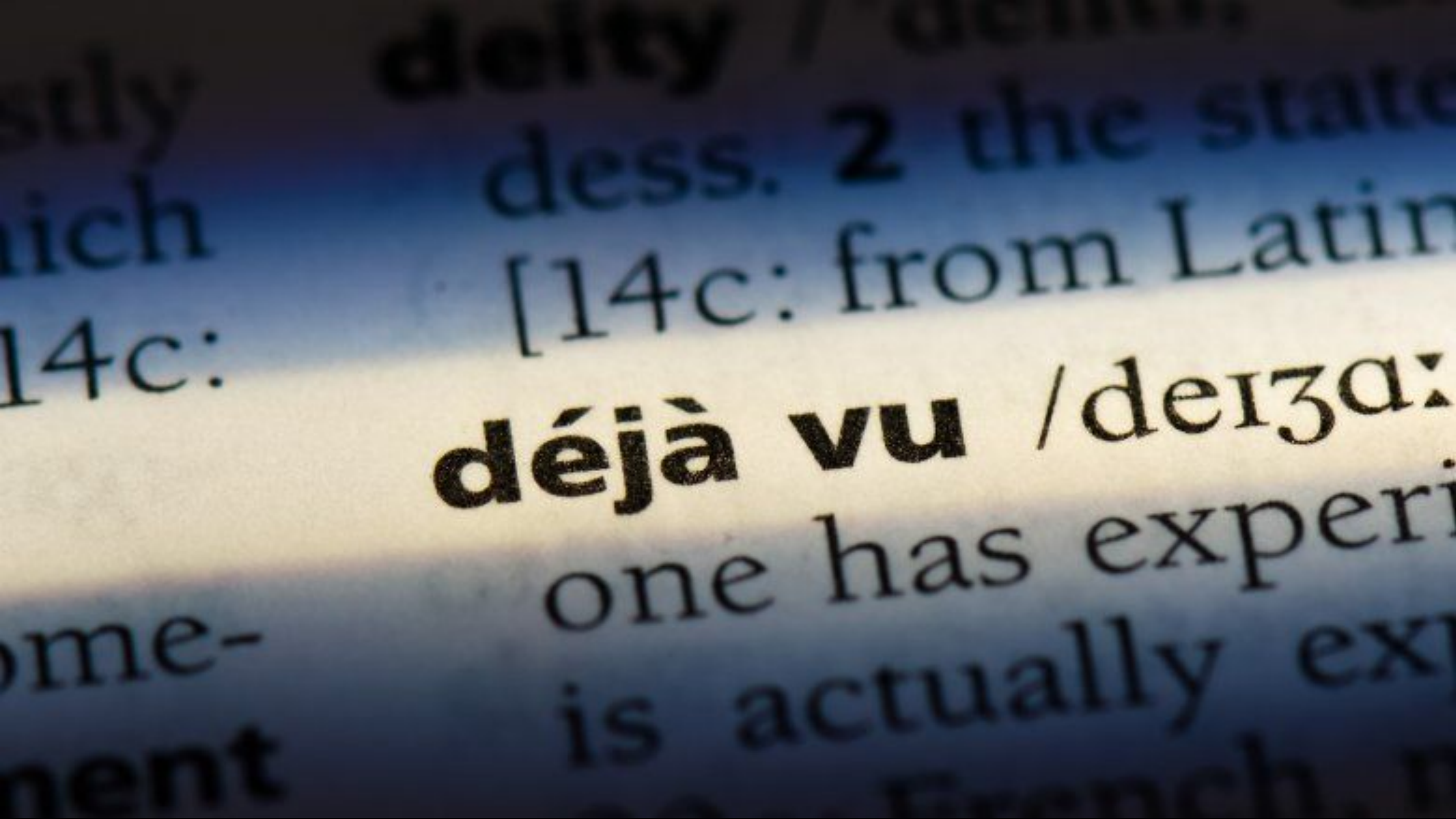
1 - obtener datos
2 - interactuar


AbilifyMyCite®
(aripiprazole tablets with sensor)
Dispense the accompanying Medication Guide to each patient.
Needs a compatible mobile device.
Please see U.S. FULL PRESCRIBING INFORMATION including Boxed WARNING enclosed.
Keep Abilify MyCite® components out of the reach of children.
5 mg
30 Tablets
NDC 59148-030-85
AbilifyMyCite
(aripiprazole tablets with sensor)
Dispense the accompanying Medication Guide to each patient.
Rx only
5 mg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Culture Segments

The Segments

We have identified 8 segments within the market for arts, culture and heritage:

Enrichment
mature
traditional
heritage
nostalgia

Entertainment
consumers
popularist
leisure
mainstream

Expression
receptive
confident
community
expressive

Perspective
settled
self-sufficient
focused
contented

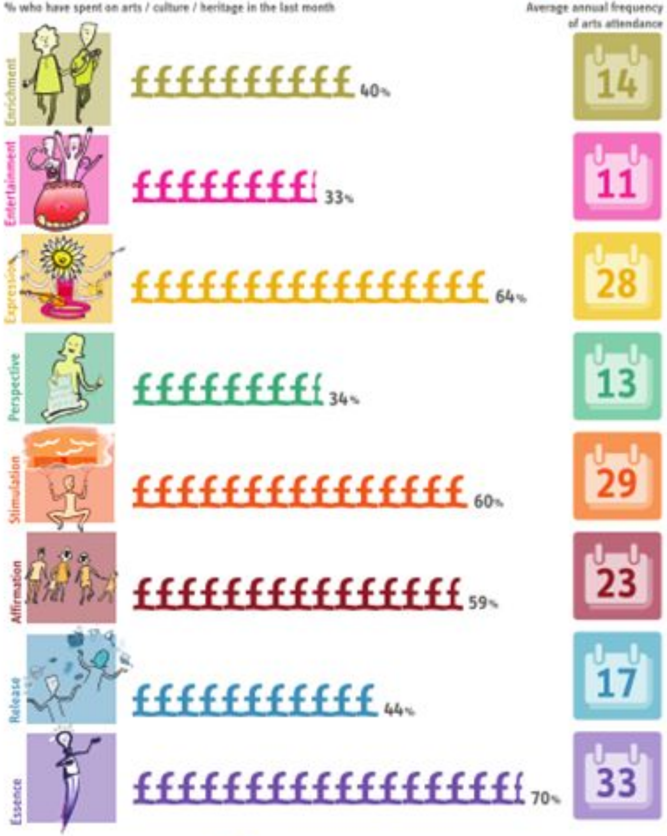
Stimulation
active
experimental
discovery
contemporary

Affirmation
self-identity
aspirational
quality time
improvement

Release
busy
ambitious
prioritising
wistful

Essence
discerning
spontaneous
independent
sophisticated

Each segment has different levels of spending and consumption



ENTERTAINMENT

Who are they?

The Entertainment segment tends to be conventional, younger adults for whom the arts are on the periphery of their lives. Their occasional forays into culture are usually for spectacular, entertaining or must-see events, and compete against a wide range of other leisure interests.

Attitudes and life priorities

HOME AND PUB
TV, CELEBRITY, SPORTS
THRILL
ESCAPISM
PRIORITIES ARE VERY CLOSE TO HOME

What needs are they looking to fulfil?

This segment looks for escapism and thrill in leisure activities. Leisure time is for fun, not for learning or applying oneself intellectually - this is something they are looking to escape from through their leisure pursuits. They are largely socially motivated to attend, looking to pass time in an enjoyable and fun way with friends and family. For the most part they cannot envisage that they will meet these needs through engaging with arts and culture.

The Entertainment segment prefers to stick to the tried and tested when it comes to leisure pursuits and is not looking to be challenged or to take risks in discovering something new. They worry about what other people think about them and therefore do not want to be seen to go against the grain or to try things that do not have established, popular currency.

What do they do?

Artform interest index	Annual artform frequency index	Annual artform frequency
-35	-46	11

The Entertainment segment has a very sporadic relationship with the arts and culture, attending popular, blockbuster events that have received widespread positive reviews and that they know they are guaranteed to enjoy. They enjoy popular cultural events and activities that are exciting and spectacular such as carnival, panto, popular music and blockbuster films.

Likes and dislikes

ENTERTAINMENT

What is their value?

Expenditure

49%

33%

Spend indices

Support

Frequency of donating to arts, cultural or heritage organisations

7%

11%

The arts and culture are only one of many leisure choices for the Entertainment segment. They prefer to enjoy theme parks, sports, the seaside, package holidays and a night in the pub. When they do engage in the arts they tend to be consumers rather than creators or participators, and stick to mainstream cultural activities. They will pay a premium for something that they are keen to see, but it will need to be spectacular and must-see when it comes to culture.

They do not believe that the arts contribute to people's lives or society at large, and therefore tend not to support public subsidy of the arts. They spend little time worrying about issues such as faith, the environment or consumerism, but are concerned with issues closer to home, such as the cost of living and local issues. They have limited development potential as either supporters or volunteers.

How to reach this segment

Link into mainstream through TV, sports and celebrity	Emphasis on one off, must-see events and shows	Promote escapism and excitement

Key marketing proposition

'Highlight the thrilling and must-see elements, position as a blockbuster event'

The Entertainment segment is only willing to spend on leisure and recreation if they believe it will meet all of their needs. While they may not see a value in the arts and culture per se, the right type of event has the potential to provide exactly what they want - primarily escapism and thrill.

They are heavily influenced by advertising via mainstream media. Their children also influence their behaviour so pester power would work on this segment. As they are not looking for anything overtly cultural; 'culture' needs to be downplayed in the marketing, with messaging emphasising the 'must-see', 'not to be missed', 'thrill' and 'blockbuster' elements of the offer.

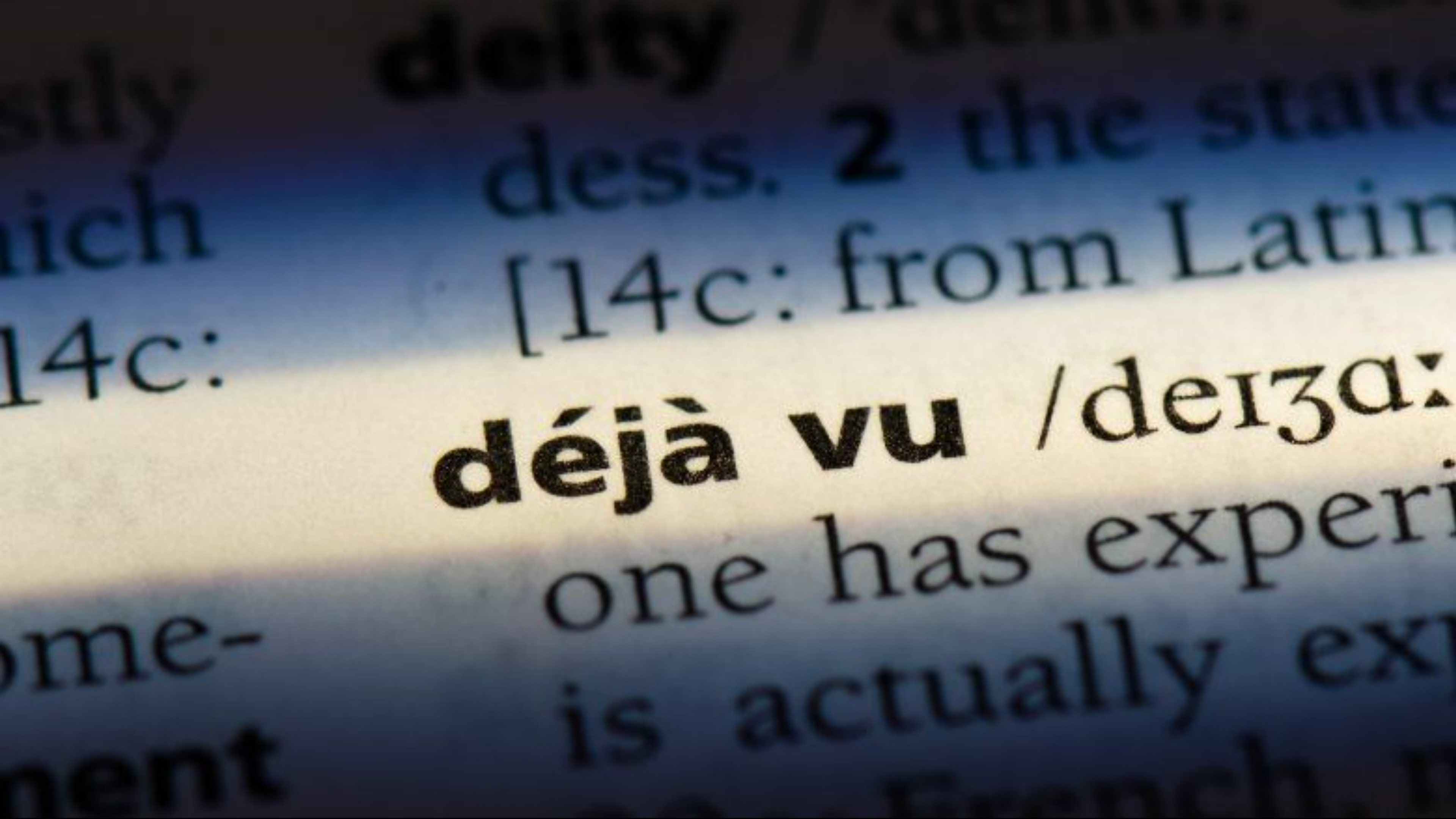
They are the most likely segment to read tabloids such as The Sun and News of the World and are highly externally referenced therefore tend to respond well to celebrity and brand endorsement.

The 7 Pillars of Audience-focus

Inward → Outward

	1	2	3	4	5	6	7
	Vision-led	**Outcome-orientated**	**Interdisciplinary**	**Brand DNA-driven**	**Meaningfully-segmented**	**Insight-guided**	**Interactively-engaged**
Values	Believe that the audience is as important as the programme.	Believe outcomes (change) more important than outputs (productivity)	Believe it's everyone's job to respond to audience needs.	Believe that Brand is the DNA: the who, why and how of the Cause.	Believe audience engagement is driven by deep-seated motivations.	Believe that audience insight is the lifeblood of the organization.	Believe in enabling and empowering audiences and communities.

	1	2	3	4	5	6	7
Features	Vision expressed as a **Cause**: how what we do will enrich people's lives and benefit society.	Measure success by depth of engagement, audience needs met and societal impact.	Work is delivered by interdisciplinary teams of all the talents, valuing expertise but ignoring hierarchy.	The Brand DNA belongs to everyone and frames, shapes and guides every aspect of their work.	Uses the power of psychographic segments to connect to these deep-seated values and needs.	Listen to audiences, collecting rich, deep, data that illuminates every aspect of engagement.	Seeks two-way audience exchange, co-creating experiences, building community and growing social capital.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déjà vu /deɪʒɑː
one has experi
ome-
is actually ex
ment

ME

HOW TO BUILD A LASTING RELATIONSHIP:

1. Cut on dotted line.
2. Rotate 180 degrees.

WE

HOW TO BUILD A LASTING RELATIONSHIP:

1. Cut on dotted line.
2. Rotate 180 degrees.

#gracias

Pepe Zapata
pz.pepezapata@gmail.com
instagram + twitter: @PepeZapata