

Extended Abstract

Consumer Insights to Recover from Covid: Obstacles of Young Adults' Cultural Experiences

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Abstract

Framing of the research. *Arts organizations have been subject to the strong disruptive impact of the global pandemic. The Johns Hopkins Center for Civil Society Studies (2021) has estimated that American arts organizations have lost \$17.97 billion, and in general, the recent lockdowns have generated huge financial losses. At the same time, a dreadful employment loss has been recorded: according to Florida and Seman (2020) at the Brookings Institution between April and July 2020 the cumulative losses in creative occupations were higher than 2.3 million jobs in the USA. A safe resumption of activities in the cultural and creative sectors is a priority also across the EU, for which the Commission has published the EU guidelines in June 2021. Supporting Arts and Cultural Organizations (ACOs) is mandatory for every policymaker, but to be successful they must leverage key consumer insights. Indeed, public policies should stimulate and sustain appropriate individual behaviors while limiting and overcoming their obstacles. Towards that end, the initial step of every policy is always a comprehensive and updated understanding of consumers' preferences and behaviors, and nowadays, consumer insights are well-known precious inputs in the design and delivery of public policies (OECD 2017). Despite such a recognition, the range of jurisdictions that have incorporated behavioral insights in policymaking is still scant. This research project aims at gathering new consumer insights to provide policymakers with useful knowledge when designing their policy to support artistic and cultural organizations recovering from Covid-19. A deeper understanding of consumers' interactions and relationships with artworks provides insights that are very useful for the development of an immersive and transformative discourse (Goulding 2000; Stavraki 2016). This research project builds on three key pillars, as follows:*

- 1) *The experiential perspective is the conceptual framework. The actual research project assumes an experiential perspective on cultural consumption. Specifically, it leverages the customer experience (Addis and Holbrook 2001), whose cognitive and emotional values should be understood to develop an immersive discourse (Carù and Cova 2006). When individuals interact with artworks, they engage in a very complex relationship that needs to be carefully explored to identify the broad range of desires and value perceptions. Our research project leverages the customer experience model, which proposes customer experience as a complex construct resulting from two main dimensions, namely, (a) a continuous interaction brand-individual using senses through any direct and indirect touchpoints that dot the customer journey over time in the technological, physical, and social platforms, and (b) affective and cognitive processes by which individuals interpret these interactions (Addis 2020).*
- 2) *The ACOs as the focus. In addition to their huge value from the economic, social, and cultural points of view, there are two more reasons why supporting ACOs in recovery from Covid-19 is a top priority: (a) they urgently need to revise their business models regardless of the Covid-19; and (b) their benefits from the wise use of technologies are incredibly promising. Indeed, ACOs are underdeveloped from both managerial and technological points of view (Addis and Rurale 2020). The world has entered the digital imperative, with companies largely digitally immature (Fitzgerald et al. 2014). Digital technologies can help ACOs in*

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becoming more competitive regarding their business/production processes, products, or services, and through them in increasing individual and societal wellbeing, while rethinking their business models. The intersection of technology and arts has long been debated and the impact of technology on arts is regarded as disruptive (Thomson, Purcell, and Rainie 2013).

- 3) *Young adults as the target. This research focuses on young adults and the obstacles that prevent consumption. Young adults are a critical yet far target for ACOs in Italy. Young adults represent a key segment for both volume and profile in the tourism market, since they show high levels of interest in traveling abroad, with greater spending power, looking for immersive and unique experiences (Barton, Haywood, Jhunjhunwala, and Bhatia 2013; UNWTO 2016). Young people consume arts searching for intimacy/new relationships, meeting with new people, improvement of their awareness/self-actualization, food for thought/to learn something, a better balance in work-life/education-entertainment, and finally, to relax/have fun (Halliday and Astafyeva 2014). If they shape the future of ACOs and the future of the entire society, their present behaviors are quite distant from being close to arts: young people are generally less attracted by the global category of arts (The Audience Agency 2018; Office of National Statistics 2016). They are a difficult segment to understand and deal with (Noble, Haytko, and Phillips 2009): they do not only expect quality, but also social, emotional, and epistemological value (Prebensen and Xie 2017). This segment is especially interested in building their identities (Davies and Fitchett 2010; Gonzalez-Fuentes 2019). Further, despite its high heterogeneity, this segment is retrained from cultural consumption by any factual or perceived expression of unfamiliarity, irrelevance, meaningless, distance, and disinformation (Tait et al. 2019). Building and maintaining such a complex relationship is challenging for ACOs yet fundamental for recovering from the pandemic.*

Purpose of the paper. *We assume that Covid-19 represents a turning point for ACOs: the crisis asks, especially the most fragile and smaller ACOs, to completely rethink their business model to find innovative ways to serve their public (UNESCO 2020). In this project, we aim at understanding how the recent Covid pandemic has affected young adults' attitudes towards cultural consumption, and whether it has built further barriers. By adopting an experiential perspective, this study explores the perceived obstacles that might prevent young individuals from consuming arts and the expected and desired benefits. Thus, we address the customer value of cultural consumption by devoting great attention to its technological dimension.*

Methodology. *In this exploratory project, we aim at investigating the impact of the pandemic on young adults' attitudes towards cultural experiences, with a special focus on the perceived obstacles. To reach this goal and gather consumer insights, a semi-structured in-depth interview has been chosen. This methodology is especially able to allow the interviewees to express their ideas and judgments and to develop their opinions with no external influence (Kvale 1996; Rubin and Rubin 1995). Students from a European University were invited to participate in the study. In total 130 participants aged 18-30 were recruited. Apart from their age, they were heterogeneous in gender, interest, and familiarity with cultural experiences. Thus, different cultural experiences have been investigated. These interviews lasted approximately 1 hour each, and were recorded and integrally transcribed. Each interview, then, was summarized using the technique of laddering (Gutman 1982).*

Results. *By analyzing the impact of Covid-19 on young adults' attitudes toward cultural consumption, our research project highlights some key features of the customer experience that have been investigated. Some relate to the general cultural experience, as previously highlighted regardless of the recent pandemic. In this sense, our research confirms previous results: The cultural consumptions of young adults are typically dependent on a low level of interest, a high level of perceived difficulty, a high level of unfamiliarity, and in general on a high level of distance. These features disorient the young visitors increasing their cognitive efforts to take advantage of the experience. Thus, ACOs have to overcome these aspects. However, this would not be enough since Covid-19 has built additional obstacles that prevent young adults from consuming culture. Specifically, four key obstacles emerge which innovate previous knowledge of the cultural experiences of young adults in the post-Covid scenario.*

First, the cultural experience appears isolating while it should be communion. Covid has raised important barriers between people, significantly increasing their isolation. Young people have suffered heavily from isolation and social distance. The recovery of cultural consumption starts by facing and overcoming these social barriers. According to the young people interviewed, if cultural experiences are designed without paying attention to these social elements, they will maintain barriers and will raise barricades that prevent their consumption. During Covid, young adults learned to consume digital experiences, which however now appear as fictitious, unable to replace the real ones. Cultural

organizations must focus their attention on the social dimension of their designed experiences, as the only way to stimulate social exchanges, generate collective experiences, and build their sense of identity. Exchange is an essential element of the cultural experience for young adults: "The museum is sharing; if I don't discuss with anyone, what am I going to do?" (Giorgia, 23 years old). Even the mechanism appears to young adults: "When I visit museums, I go to a place that stimulates my reflection if it is beautiful. And if it happens to me, it happens to many – or maybe all – other visitors. This is why I always visit a museum with companions: I look for comparison. Since beauty is subjective, it can say something different to everyone. It is useful to discuss. And by discussing we can share an experience that would have been impossible in the case of a solitary visit" (Gianluca, 20 years old). The relevance of sharing is not limited to museums and exhibitions. When interviewed regarding his cinematic consumption, a young adult highlights the common goal of everyone in the theater: "All the people watching the screen have the same goal: to see the film. Everyone wants to get something out of the film. They are there to find the answers to the questions you also asked yourself in previous films" (Edoardo, 21 years old). The social dimension of cinematic consumption has emerged as the key driver of widely common Apps among young adults such as Rave, which allows them to chat and interact while watching videos. The young people interviewed see cultural consumption as a great opportunity to create interactions with people, to get closer to others, and to be approached by others, thus overcoming the social distance they had to endure during the lockdown, the effects of which are still feared today. For instance, when talking about theaters Anna said: "The theater is the contact you have with the other people who are there, who attend it. It does not matter if they are unknown. They are there, and they applaud with you, laugh with you, and cry with you. The theater offers you a different thing. It allows you to experience something in common with others. It is an emotion different from all the others. It is a pity that the theater does not leverage on this emotion" (Anna, 23 years old). Thus, successful customer experiences are the ones in which the social platform constitutes the core of the cultural offerings, playing a major role even higher than the traditional utilitarian visit of the works of art. The social platform of cultural experiences is so relevant for young adults that even the design of the physical environment should be designed to foster social exchanges.

Second, the cultural experience is passive while it should be co-created together with the consumers. The isolation suffered by young people is an important stimulus to require the AOCs to make greater efforts to get closer and to pay attention to consumers' personalities and preferences. Indeed, our study confirms that culture is experienced by young people as distant. Distant places are regarded as often unable to relate to their world. As Giulia says: "The great museums, the historical ones, have not approached young people and perhaps they do not need them" (Giulia, 24 years old). Camilla reinforces: "It is always the youth who goes to the museum, never the museum that goes to the youth, here in Italy at least" (Camilla, 20 years old). From the research, it emerged that this perceived distance is attributed to the responsibilities of the AOCs because they design experiences that intimidate young people. This fear of approach comes from several factors: the awareness of an AOC or the importance of its works of art put the young person in a position of subjection, arousing emotions such as embarrassment and apprehension. These emotions do not help in generating a memorable experience. To solve this issue, young adults propose co-creation as the solution. The ease of interaction supports the reduction of distance and the appropriation of the experience. Young adults would like interactive cultural experiences capable of making the individual consumer contribute, allowing him to play an active role. As Enrico says: "An interactive experience involves you, activates you. On the contrary, when visiting a museum passively you might get nothing" (Enrico, 25 years old). The main risk associated with a passively lived cultural experience is boredom.

Third, the cultural experience is perceived as depressing while it should be joyful. Covid-19 has traumatized the lives of young people. The resulting sense of fear and precariousness has pushed young people to take a negative attitude towards life. The desire for leisure, fun, and lightness now seems to be an important driver of the preferences of young people, more than they were in the past: "We young people have recently got our lives back in our hands. After nearly two years of not going out and seeing friends, of talking only about death, of seeing only pictures of coffins and hospitals, now we want to spend more time having fun. I think that for us young people going to visit a museum is not a priority now. We want to live our lives in a carefree way. We are short of time; we want to use it to the fullest. In this sense, visiting a museum as we did before is no longer our priority" (Alessio, 22 years old).

Cultural consumption can potentially offer a full range of stimuli to help young people get out of the oppressive environment in which they have found themselves. On the contrary, cultural experiences often do not pay attention to these aspects and the AOCs present themselves as old-fashion places. If in museums "everything is broken, everything is dead" (Daniele, 22 years old), theaters "are old, stale" (Giovanni, 21 years old). On the contrary, today young people are asking AOCs to let them interact and express themselves. Through interaction, any distance can be reduced and the

experience can be appropriated, as well expressed by Alessandra (22 years old): “The best thing about culture is the process of mediation of things. I see something and I transform it, for example by way of social posts. I watch the image and I recreate it. I take part in the creation process.”

Forth, the cultural experience is interpreted as educational while it should be transformative. Never as in these times have young people denounced a partial and reductive positioning of cultural experiences. The interviewees would like to find in cultural experiences an opportunity to transform their life: “You are in front of a piece of art and it is like being in front of a magical door to go into a special world, a world with no borders. You experience eternity” (Cristina, 20 years old).

Young people ask museums to enrich their personality, as Francesca (18 years old) well summarizes: “When I decide to go to a museum I do it because I want to enrich myself. Yes, I think it is my curiosity to know and to see something new, but not just to know more. I want to get more: I want to change.” Living a transformative experience is what pushes young people to leave home. Covid has made the home a formidable competitor for ACOs: comfort, tranquility, and flexibility of their homes push young people to stay here and even get lazy, as Livia complains: “I have noticed that there is much more pleasure in stay home. While we used to be more hectic and went out more, in my opinion, we found all our comforts during the lockdown. We have seen that you can do everything at home, train, work, study, take lessons and now even go to the museum thanks to the new virtual exhibitions. We got very lazy. Why should we abound all this for an experience that gives me nothing more?” (Livia, 24 years old). Indeed, young people complaint often about the fact that the experiences designed by ACOs are unable to offer what they desire. ACOs appear to propose simpler and more traditional experiences, that can be of knowledge or fun but are hardly capable of being transformative. According to Emanuele (27 years old), transformative cultural experiences generate balance: “Internal balance is almost an obligation towards oneself, and art enriches and contributes to personal balance in an important way.” And balance leads to experiencing the infinite, the sublime.

Research limitations. Like any research project, also this study is subject to a few limitations. First, the chosen methodology investigates the cultural experiences mainly from a cognitive point of view. The more emotional processes might remain less explored. Second, since young adults are a very heterogeneous segment searching for different values and benefits (Tait et al. 2019), some moderating variables could play a role in our nomological network.

Managerial implications. Several managerial implications emerge from our study that could drive the next generation's cultural experiences for young adults. First, ACOs should design cultural experiences by investing in social stimuli. The social dimension of the cultural experience emerges as a key driver and should be explored in many ways. Compared to the classic phases of the customer journey map, the stimuli for sharing can be placed before, during, and after the cultural visit. Before the visit, the social platforms that allow the sharing of a trailer and individual comments of a film or a theater - think of YouTube, Instagram, or Facebook - are a priority information source for young adults. Even digital exhibitions act as previews of the real experience, capable of attracting attention and stimulating interest in visiting the exhibition in reality, just like trailers for films do. Careful and appropriate uses of social media could also help AOCs in gaining young adults' attention. Several times in our interviews, digitization has emerged as a booster of the preferences of young adults. Seeing things, in reality, is another matter entirely. Seeing a work of art, in reality, is different from studying it in a book: “It satisfies you to a greater extent” (Luca, 18 years old). Socialization during cultural consumption is a critical aspect, especially for that consumption for which it is traditionally prevented. Think of cinema, for example, as a form of consumption in which interaction and sharing during viewing are impossible, to the advantage of streaming platforms which, on the other hand, allow and stimulate them by transforming the viewing of a film into a collective experience. Finally, post-consumer sharing typically goes through Instagram. The creation of instagrammable physical environments, created ad hoc to allow the creation of a shareable memory, represents an essential element of the cultural offer for young people. For example, according to Davide “some museums in the world are famous only for being instagrammable, not because they have unique works of art” (Davide, 24 years old). According to the young people interviewed, the creation and sharing of unique memories linked to cultural consumption would allow not only increase the value of the experience and its memorability but also approach clusters of consumers that are traditionally not interested in arts. Second, co-creation represents the next future of cultural experiences. Interactive stimuli should offer young adults the opportunities to contribute to creating cultural value. ACOs should therefore pay attention to the touchpoints across the customer journey map so that customers with different levels of familiarity could perceive a welcoming environment. Indeed, the high level of energy and motivation required in the cultural experience (Caldwell 2000; Chen 2009; Stavraki 2016) might be mitigated when the individual participates in the co-creation of the value of arts and plays an active role in the learning

environment (Venäläinen 2012). Third, positive emotions represent a key driver of a joyful and inclusive cultural experience. ACOs should pay great attention to adopting languages that can communicate with young adults, even if that means a more informal debate. Finally, ACOs should adopt well-being as their point of reference. Well-being represents the ultimate goal of any cultural experience, but young adults ask now for something more. They are very favorable towards transformative experiences, that is experiences that can increase their sense of life, and them a purpose in life. The study of individual and collective well-being is no more than fifteen years old but in this short time, it has nevertheless attracted general attention. Although it is difficult to define it precisely, today well-being is a multidimensional concept comprising three main aspects (OECD 2013): (1) satisfaction with one's life; the effect that captures the emotional states (negative and positive) of a person at a given moment; eudaimonia, that is, the extent to which the individual achieves his or her purpose in life. Placing well-being as the ultimate goal broadens the spectrum of cultural experiences for ACOs, their customers, and the entire society.

The originality of the paper. Our study contributes to advancing the cultural experience knowledge. By investigating the effect of the recent pandemic on the cultural experiences from the young adults' perspective, our study identifies four additional obstacles that ACOs face to recover from Covid-19. By designing social, co-created, joyful, and transformative cultural experiences ACOs can enhance their heritage, arts, and culture and attract and engage young adults. Our results are innovative because they shed light on strategies and policies to attract a specific target – i.e. young adults – which is critical for the future of our society. By exploring deeper the cultural experience of young adults in the post-Covid scenario, our study also contributes to a better understanding of the customer experience construct.

Keywords: cultural experiences; Covid-19; young adults; marketing; arts and cultural organizations

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