



CULTURE
RESTART

Culture Restart audience tracker

Wave 4

January 2021

INSIGHTS
ALLIANCE

indigo

BAKER**RICHARDS**

One Further

supporting cultural recovery

Culture Restart audience tracker is designed to help organisations to:



Keep **audiences** engaged and involved during closure



Track **key metrics** around audience intention to attend



Gain vital data needed to **plan** a safe and financially viable reopening



Understand variances in **sentiment** of different audience segments



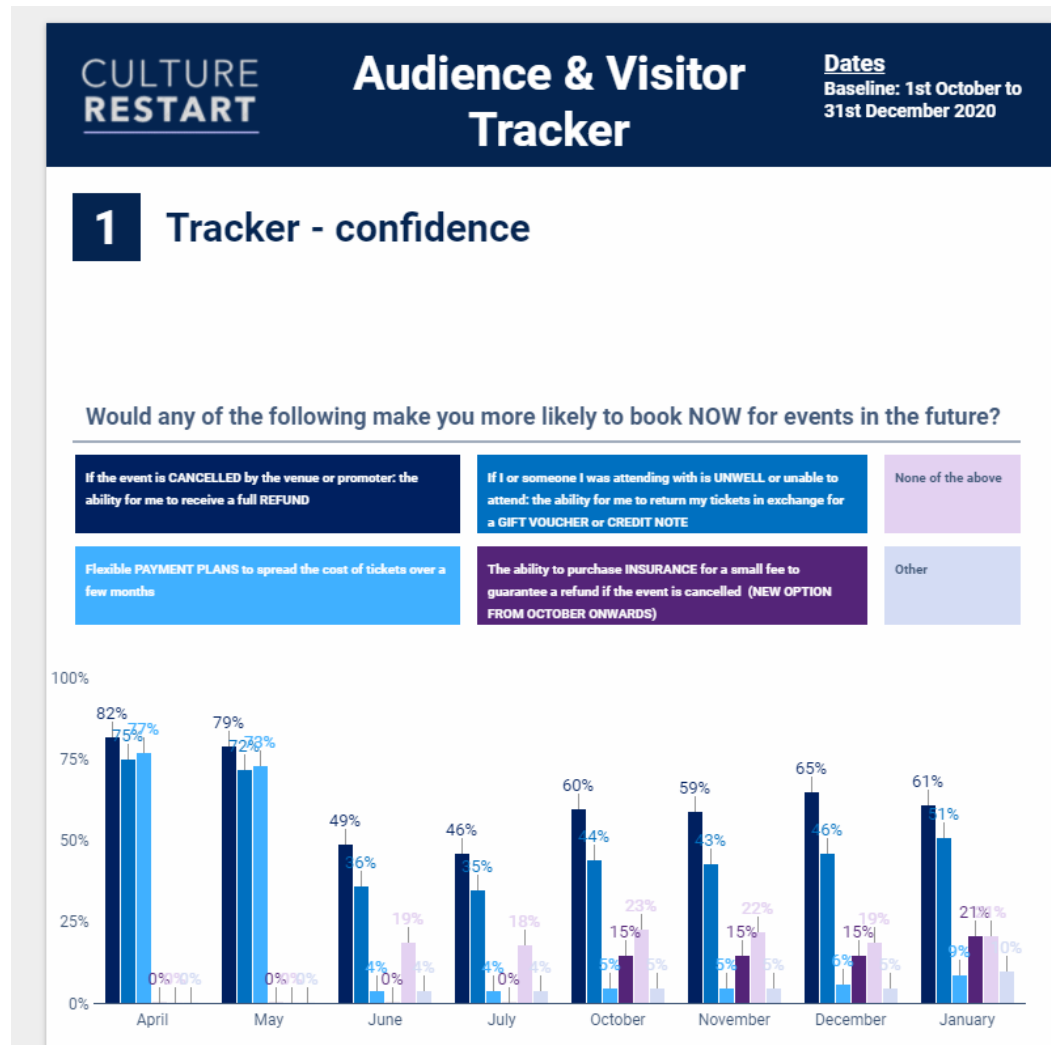
Assess the appeal of **digital** content and willingness to pay for it, both before and after reopening

The Culture Restart Toolkit is delivered by the **Insights Alliance**, a group of three prominent UK consultancies who are working together to help the cultural sector gather the essential audience insight needed to plan for a successful recovery and restart

Our commitments to the sector

- 1 Completely **impartial** data, **transparently** presented
- 2 Organisation-specific data delivered in **real time** with participating companies
- 3 Openly shared joint insights for **venues, producers, artists, curators, freelancers and supply chain**
- 4 Tracking **shifts in sentiment** as rapidly as possible

Interactive dashboard: Culture Restart Audience & Visitor Tracker



- [One Further](#) have created an interactive dashboard, allowing you to filter by criteria including age, frequency, vulnerability and region.
- Currently the dashboard includes data from our baseline period - October to January 2021- and will be regularly updated to include further months from our ongoing research.
- [**Browse the dashboard**](#)

Survey Overview



SURVEY DATE

WAVE 1: OCT 2020

WAVE 2: NOV 2020

WAVE 3: DEC 2020

WAVE 4: JAN 2021



RESPONSES

21,873

WAVE 1: 4,946

WAVE 2: 6,887

WAVE 3: 4,775

WAVE 4: 5,265



PARTICIPATING ORGANISATIONS

50

Respondent profile



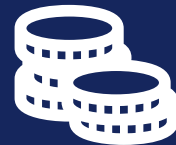
AGE

35% OVER 65
16% UNDER 45



LOCATION

**98% FROM OUTSIDE
LONDON**



FINANCES

20% HAVE LOST INCOME

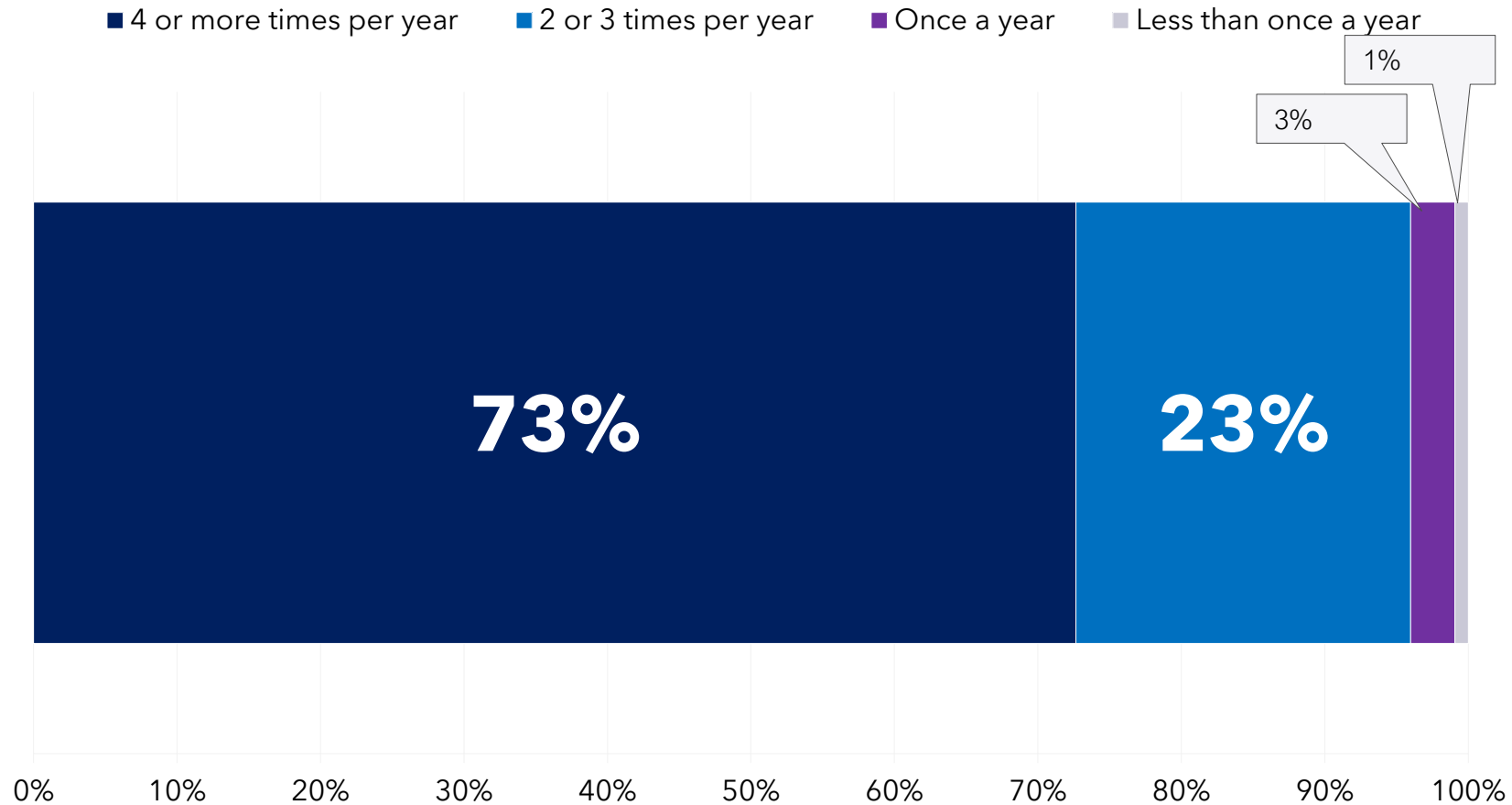


VULNERABLE

**28% CLASSED AS
VULNERABLE**

Attendance pre-Covid

How often would you say that you attended or visited cultural experiences before Coronavirus?



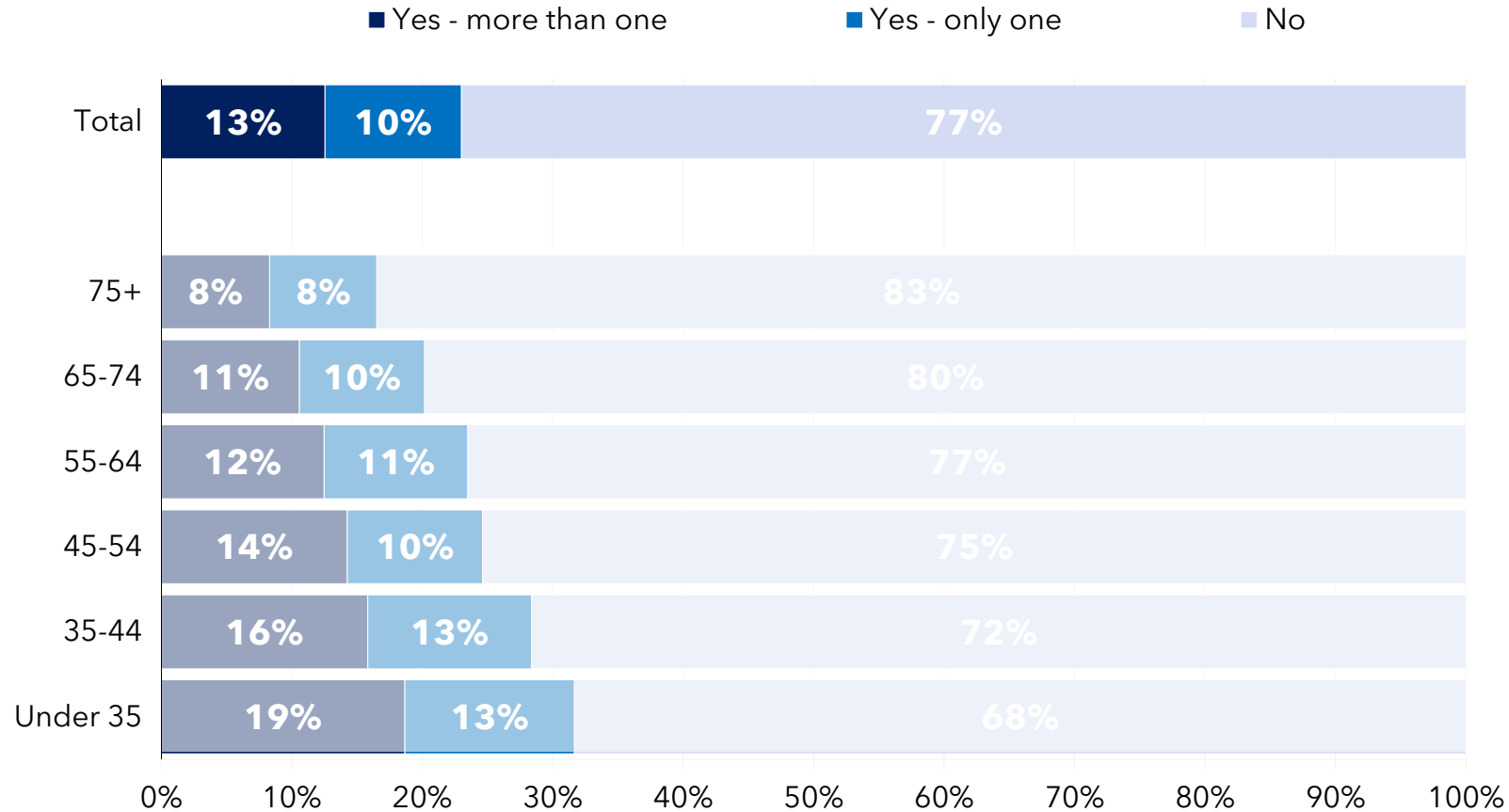
HOW OFTEN?

- 73% of respondents were attending or visiting 4 or more times a year pre-Covid

n = 21,855

Attendance since Covid- 19

Have you attended (in person) any cultural events, activities or venues since some cultural organisations began to re-open?



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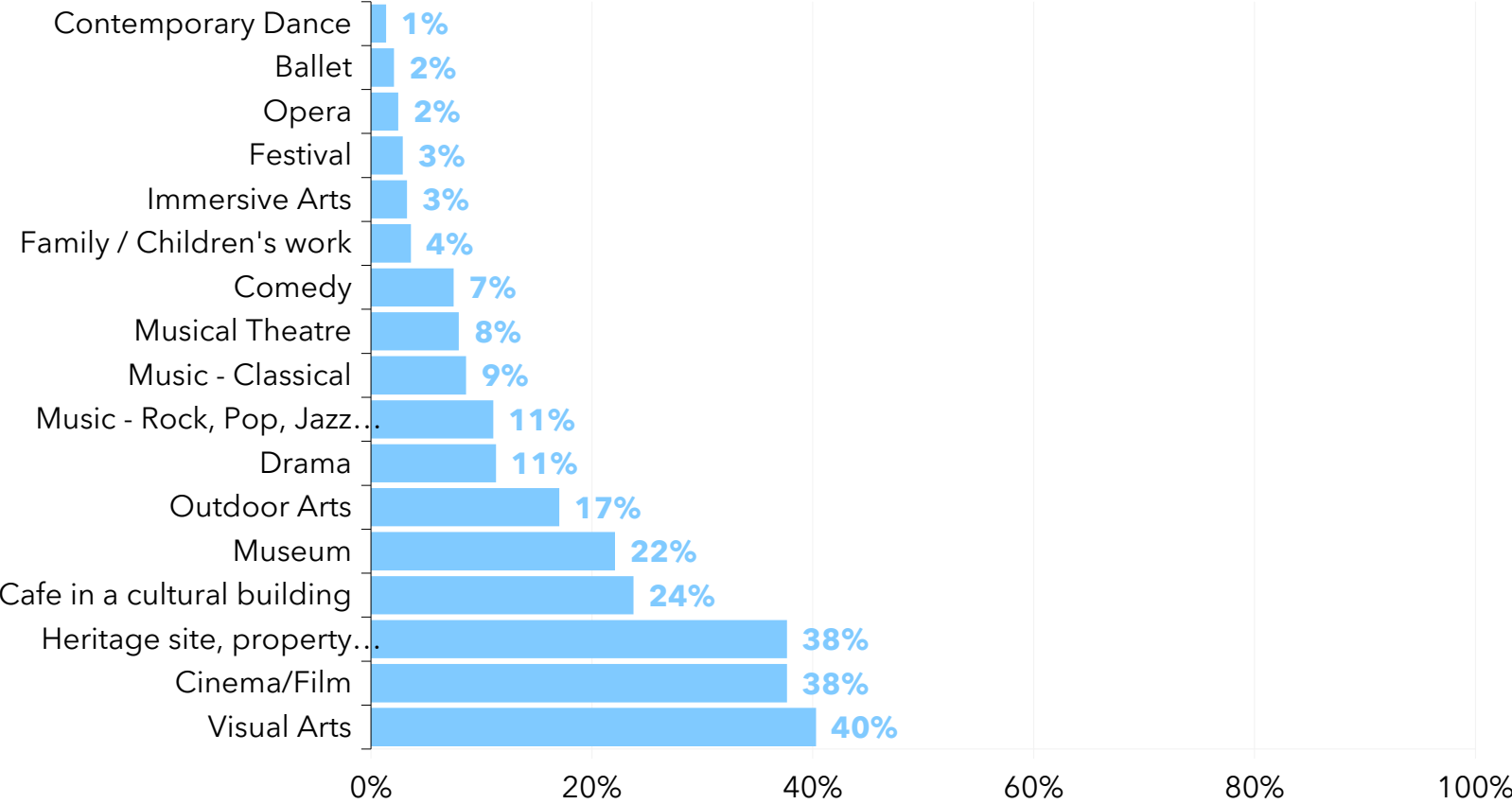
ATTENDANCE SINCE COVID

- 23% of respondents have attended a cultural event since re-opening
- Younger people are more likely to have attended events since re-opening, including multiple events
- Over 75s are least likely

n = 21,868

Which types of venues and activities have you attended since some organisations began to re-open?

■ Have been since lockdown

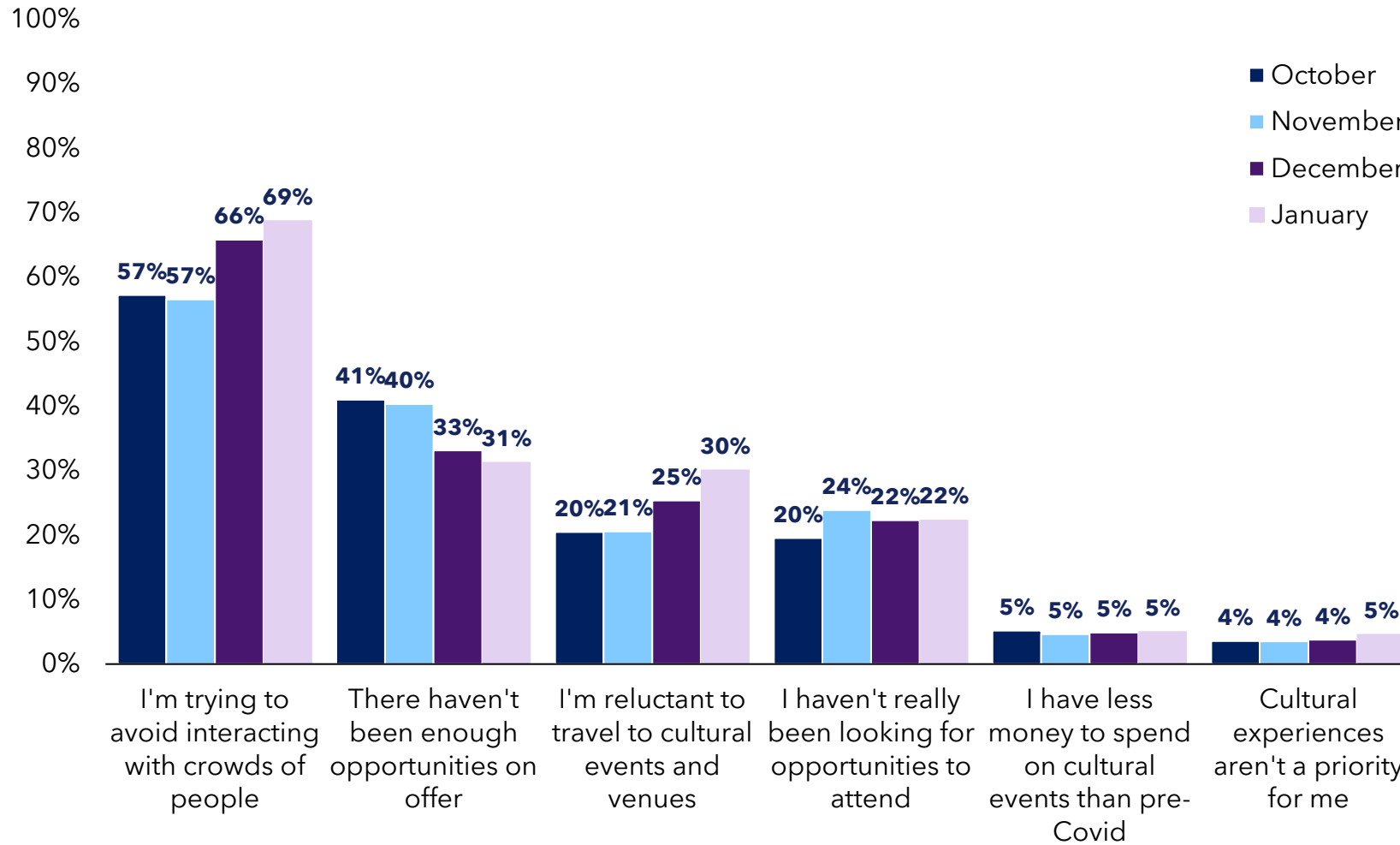


WHAT EVENT?

- Visiting Visual Arts, Cinema and Heritage sites are the most common cultural activities since lockdown
- This will mostly be due to relative availability compared to other artforms

Have been since lockdown total n = 5,003

If not, why is that?



REASONS FOR NOT ATTENDING

- The number of respondents concerned about crowds and travelling increased in December and January
- Along with reluctance to travel to cultural events and venues

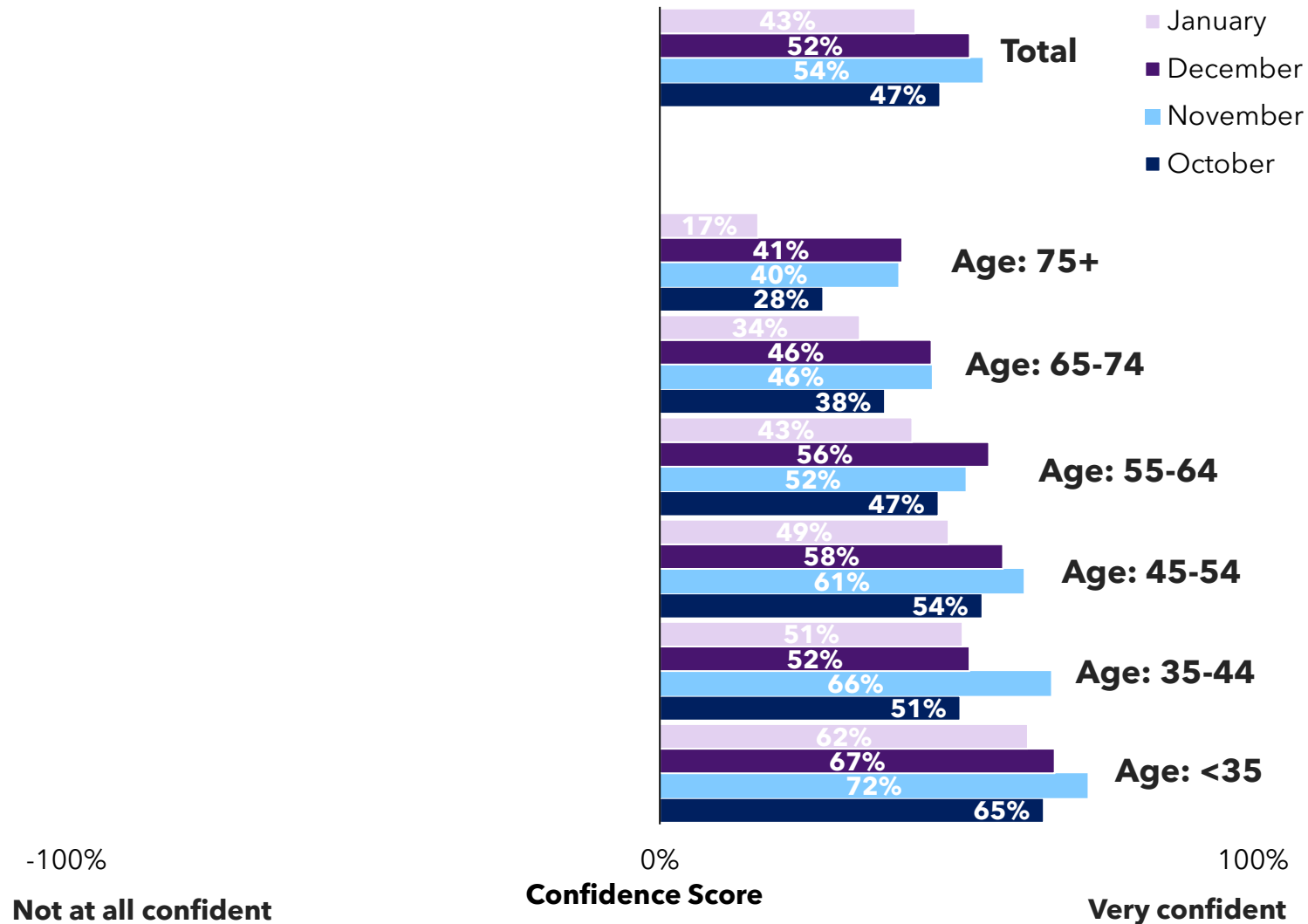
October n = 3,710

November n = 5,289

December n = 3,700

January n = 4,082

How confident do you feel about attending cultural experiences in the future?



CONFIDENCE

- The net confidence score is currently at its lowest point, at +43%
- Under 35s are more likely to feel confident than older age groups
- Confidence dropped across all age groups in January

October n = 1,172
 November n = 1,431
 December n = 1,004
 January n = 1,095

Attendance since Covid- 19



RETURNED

23% OF RESPONDENTS HAVE ATTENDED A CULTURAL EVENT SINCE RE-OPENING

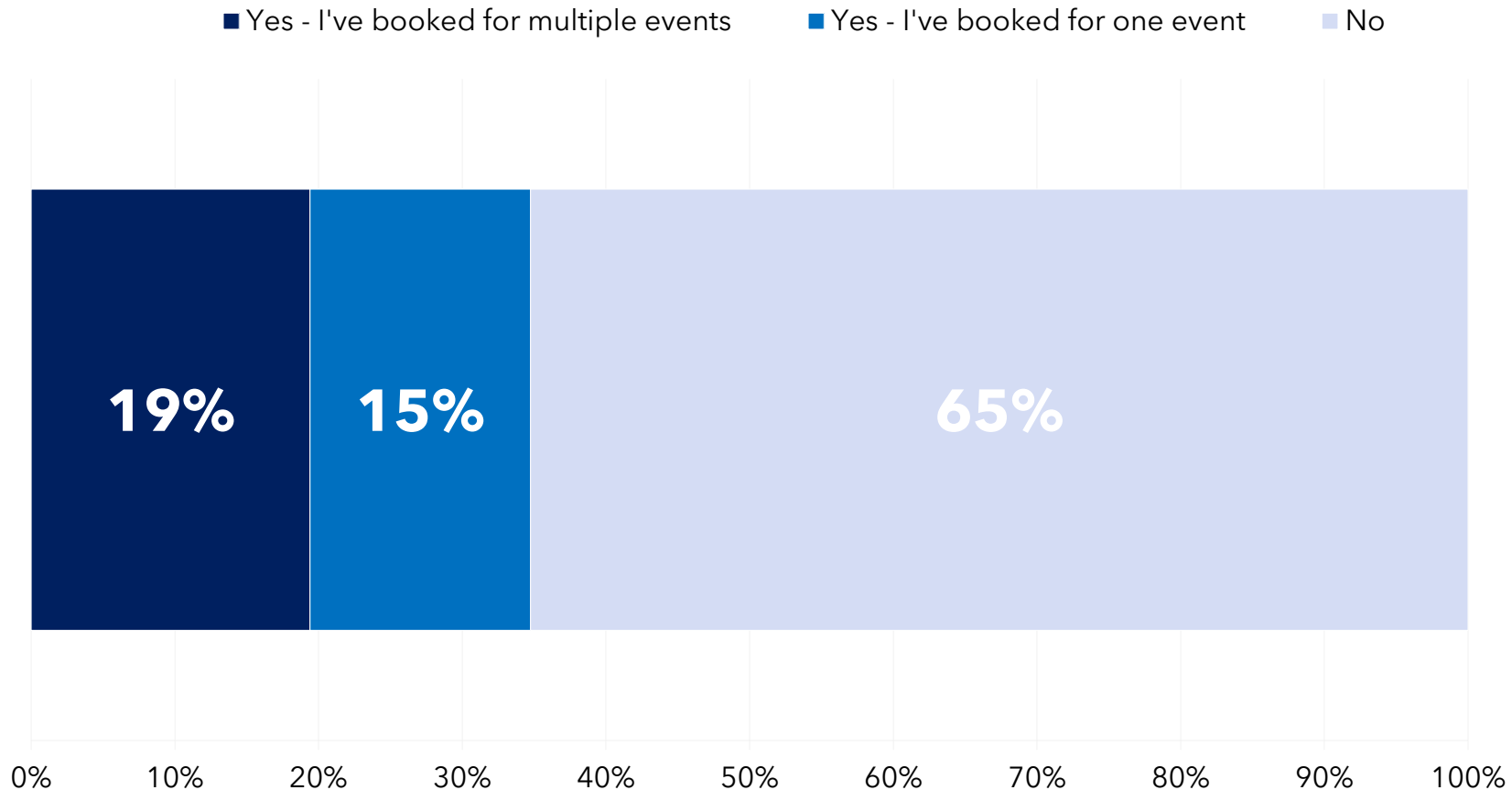


CONFIDENT

AFTER THE INCREASED CONFIDENCE IN NOVEMBER TO +54 CONFIDENCE IN JANUARY HAS FALLEN TO ITS LOWEST POINT AT +43

Bookings for future events

Have you booked for any cultural events or activities SINCE venues closed in March that you haven't yet attended?



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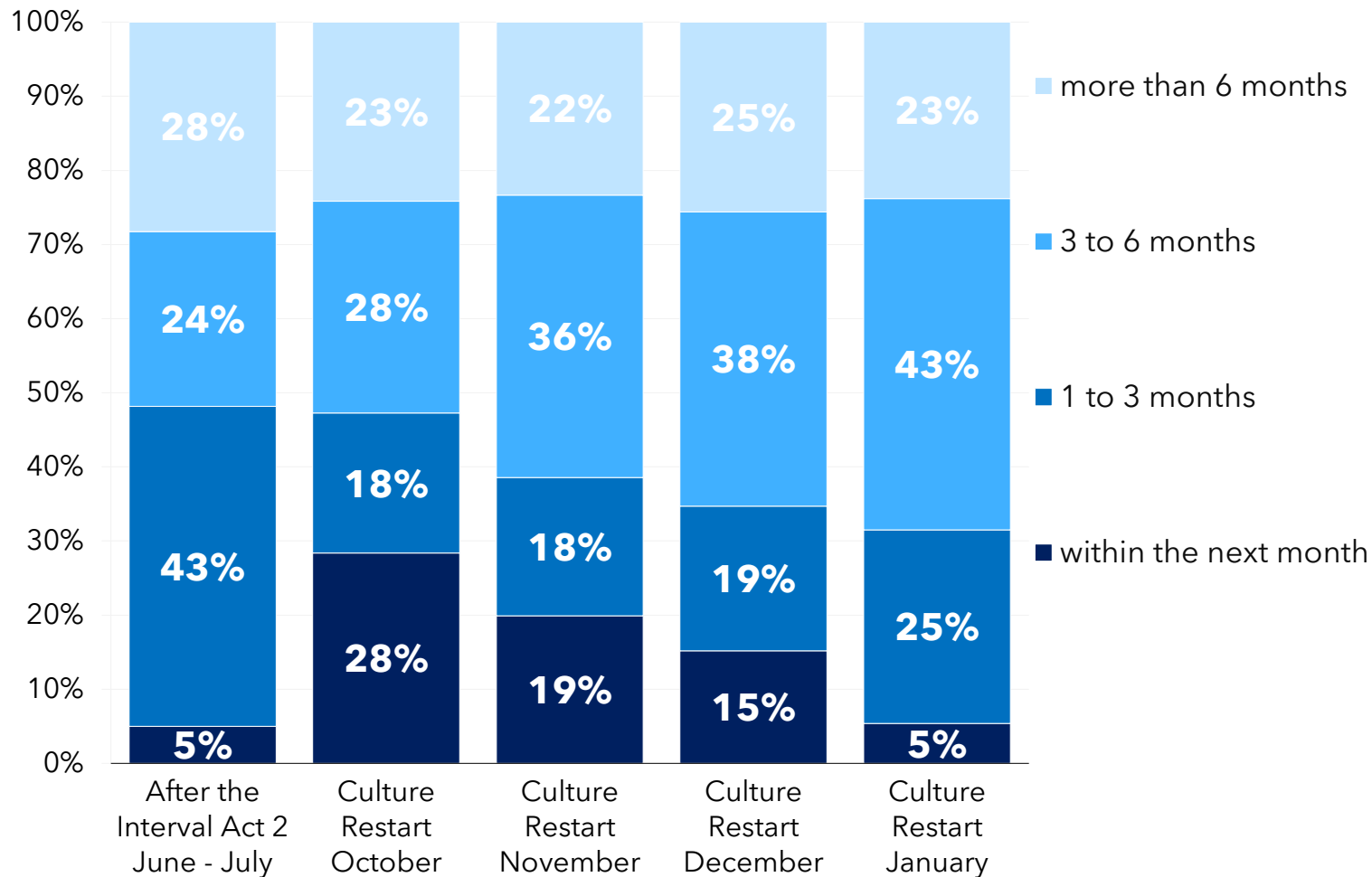


FUTURE EVENTS

- 34% of respondents have booked events since March they haven't yet attended
- Those who have booked are slightly more likely to have booked for multiple events than one event

n = 21,868

When is the FIRST event or visit that that you have booked for scheduled to take place?



FUTURE EVENTS

- The number of respondents attending an event in the next month dropped to 5% in January
- The number attending within the next 6 months has remained stable
- Although the proportion attending in 3 to 6 months has been growing

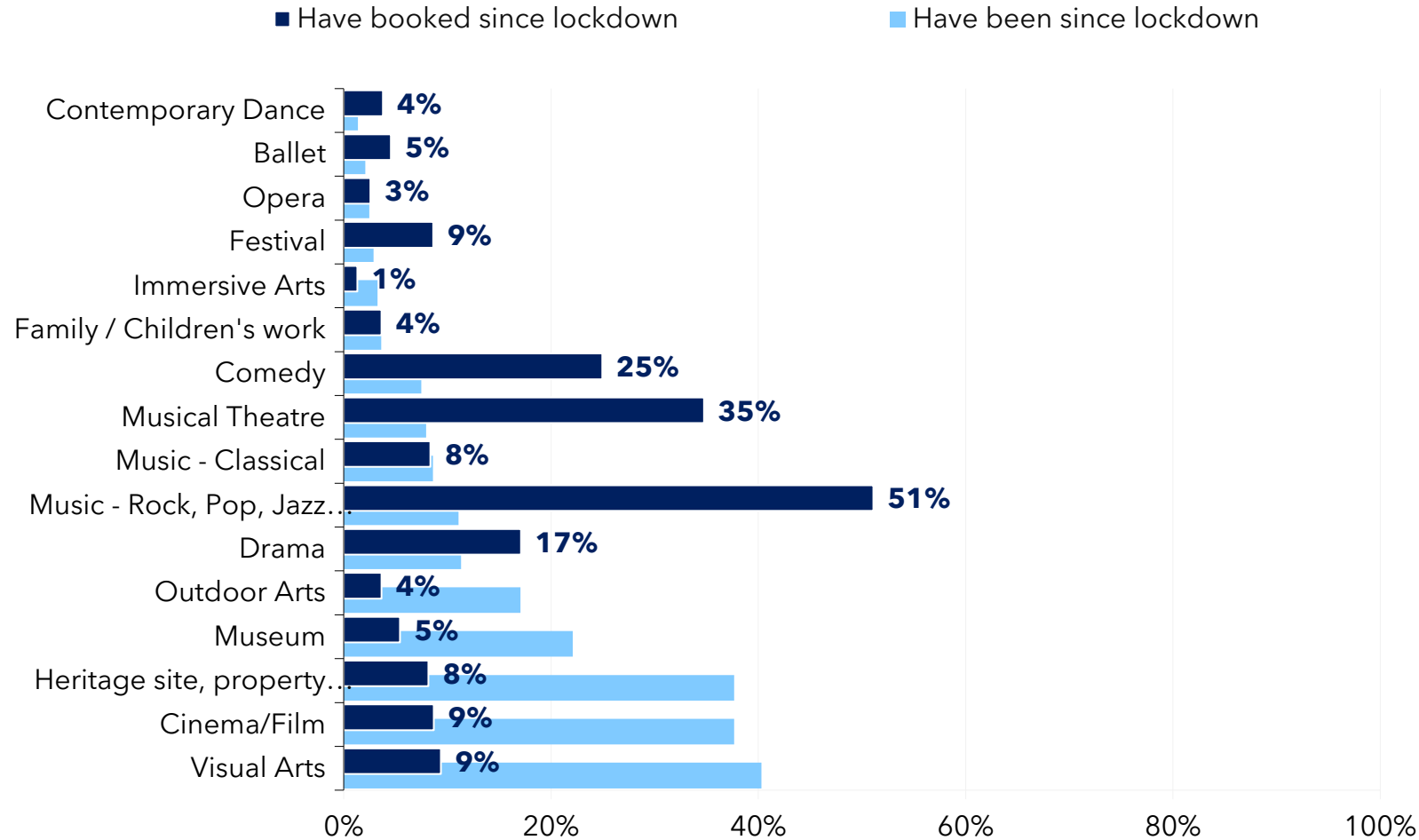
October n = 1,561

November n = 1,904

December n = 1,797

January n = 2,312

Which of the following best describes the types of event(s) or activity(ies) you have booked for?

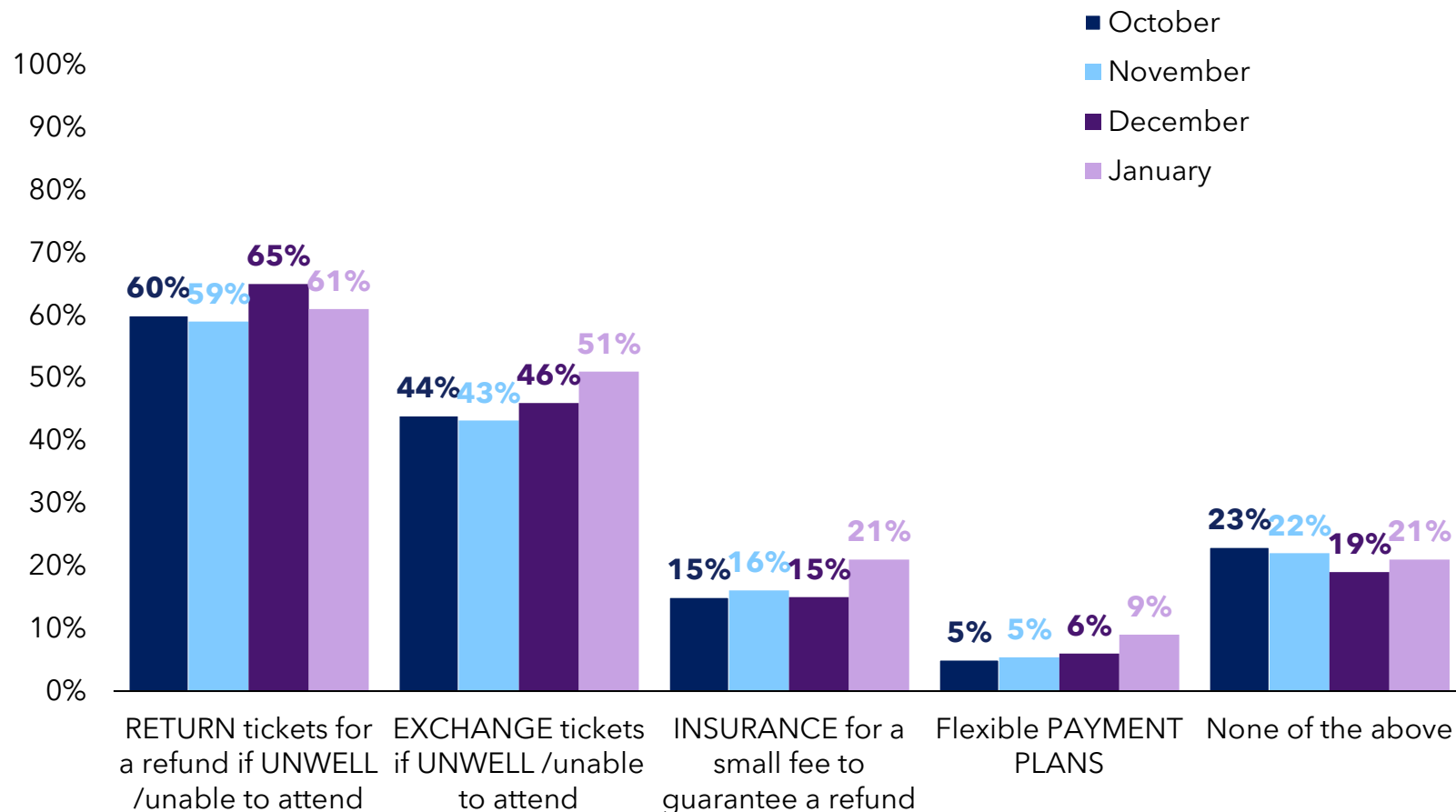


WHAT EVENT?

- Music - Pop/Rock is the most popular artform currently being booked for
- This is followed by Musical Theatre and then Comedy
- All of which are artforms that have been largely unavailable since lockdown

Have been since lockdown total n = 5,003
Have booked since lockdown total n = 6,633

Would any of the following make you more likely to book NOW for events in the future?



ASSURANCES

- The ability to return tickets if unable to attend remains high at 61%
- Exchanging tickets is becoming increasingly more likely to reassure respondents

October n = 4,931

November n = 6,869

December n = 4,775

January n = 5,265

Bookings for future events



BOOKING AHEAD

34% OF RESPONDENTS HAVE BOOKED EVENTS SINCE MARCH THAT THEY HAVEN'T YET ATTENDED

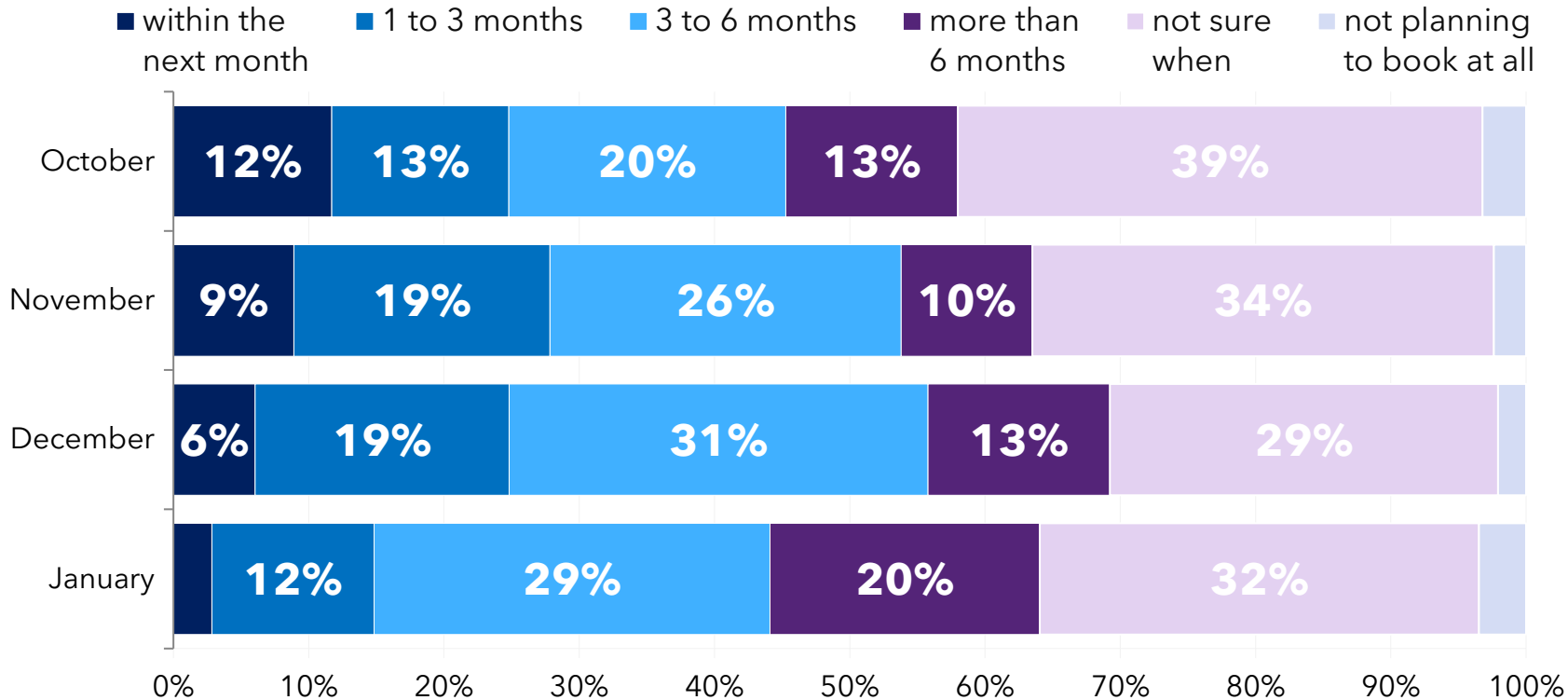


TICKET RETURNS

THE ABILITY TO RETURN TICKETS IF UNABLE TO ATTEND REMAINS IMPORTANT AT 61% IN JANUARY AND EXCHANGES HAVE BECOME MORE IMPORTANT INCREASING TO 51% IN JANUARY FROM 46% IN DECEMBER

Attitudes to attending cultural events again

If you had to say now when you think you'll be ready to start **BOOKING** for events again, which of the options below would you choose?



READY TO BOOK

- The proportion ready to book within the next month has fallen every month
- Those ready to book within the next 6 months fell for the first time in January

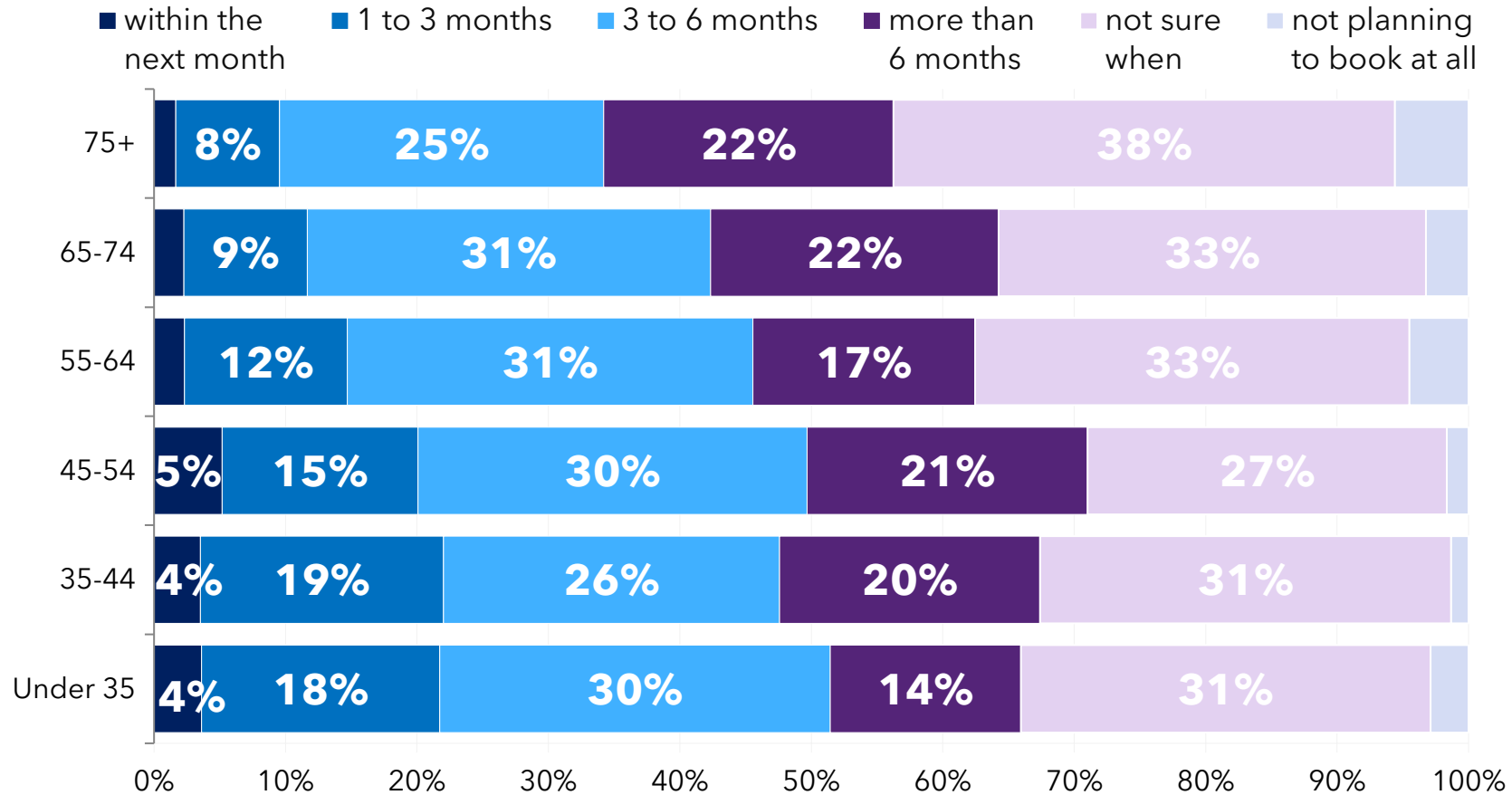
October n = 3,389

November n = 4,950

December n = 2,977

January n = 2,952

If you had to say now when you think you'll be ready to start **BOOKING** for events again, which of the options below would you choose?

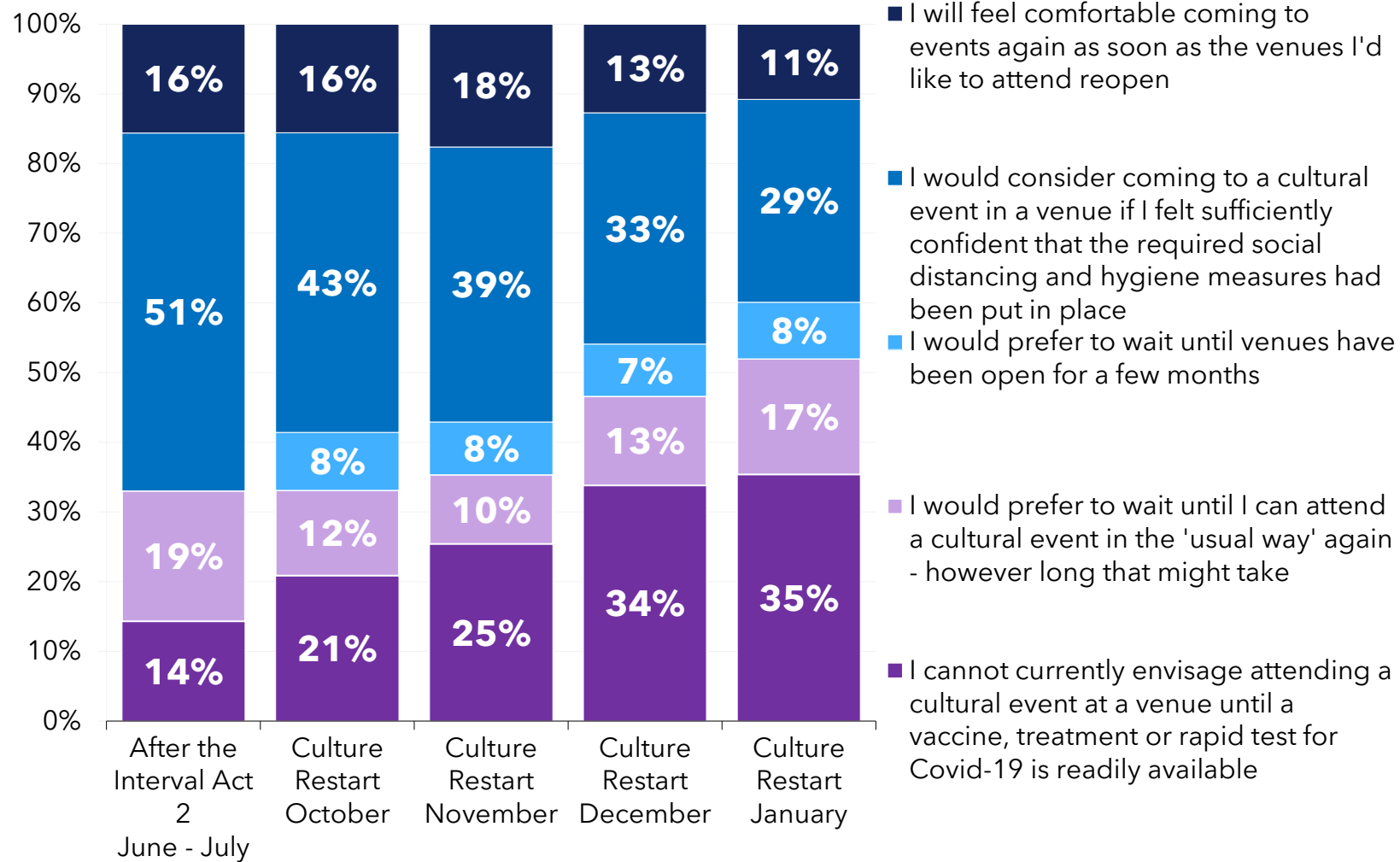


READY TO BOOK

- Those Under 55 are slightly more likely to say they'll be ready to book within the next 3 months

Jan responses:
 Under 35 n = 138; 34-44 n = 227;
 45-54 n = 483; 55-64 n = 823;
 65-74 n = 926; 75+n = 304

Please tell us which of the following statements best fits how you're currently feeling about coming out to events at a venue again.

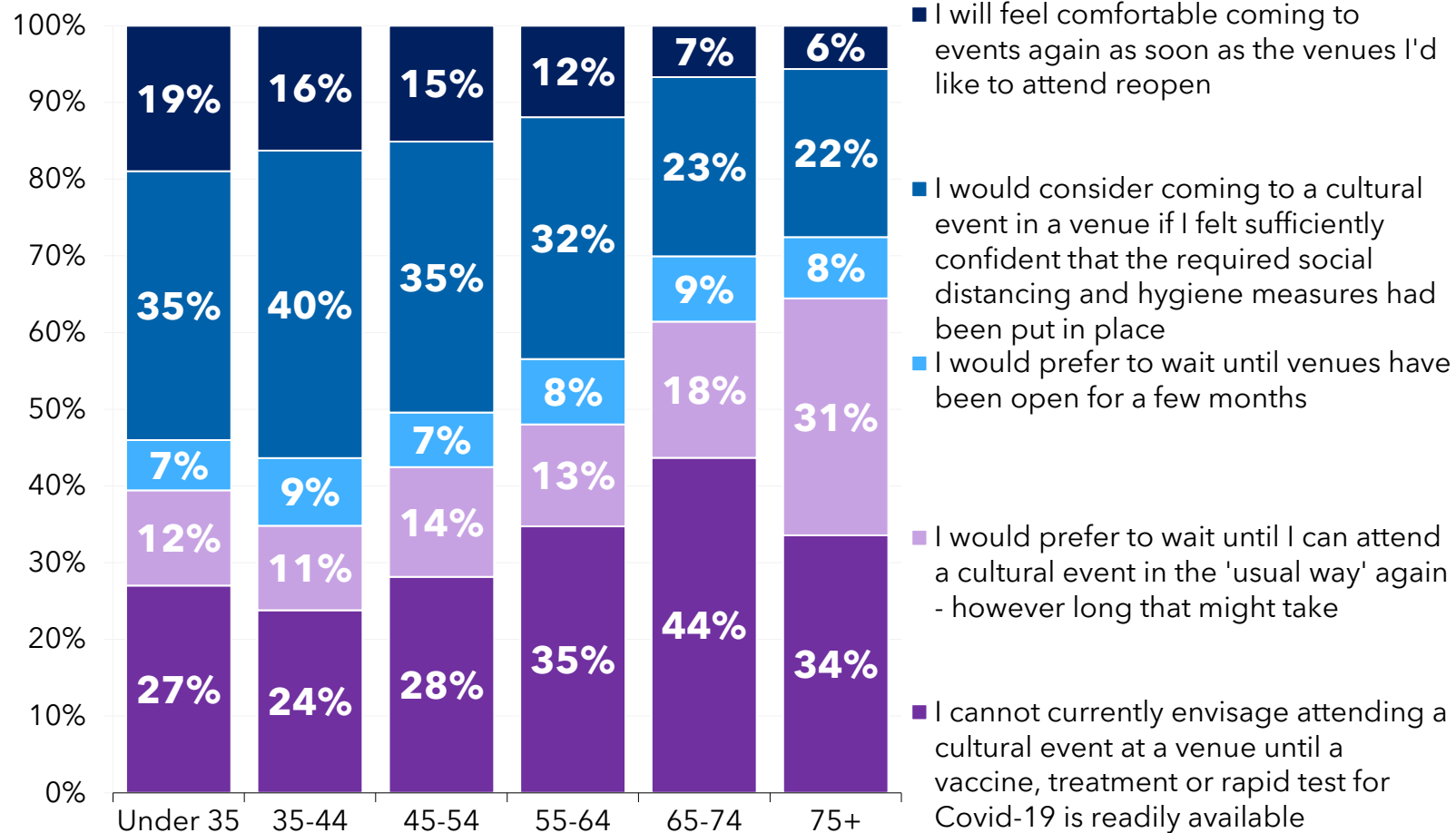


RETURNING TO EVENTS

- The proportion who are waiting for a vaccine or treatment before attending has increased from 14% in July to 35% in January

October n = 3,358
 November n = 4,904
 December n = 2,949
 January n = 2,927

Please tell us which of the following statements best fits how you're currently feeling about coming out to events at a venue again.



RETURNING TO EVENTS

- The proportion waiting for a vaccine increases with age.
- However, 31% of the oldest group (who are most likely to have been vaccinated) now want to wait until they can attend in the 'usual way'

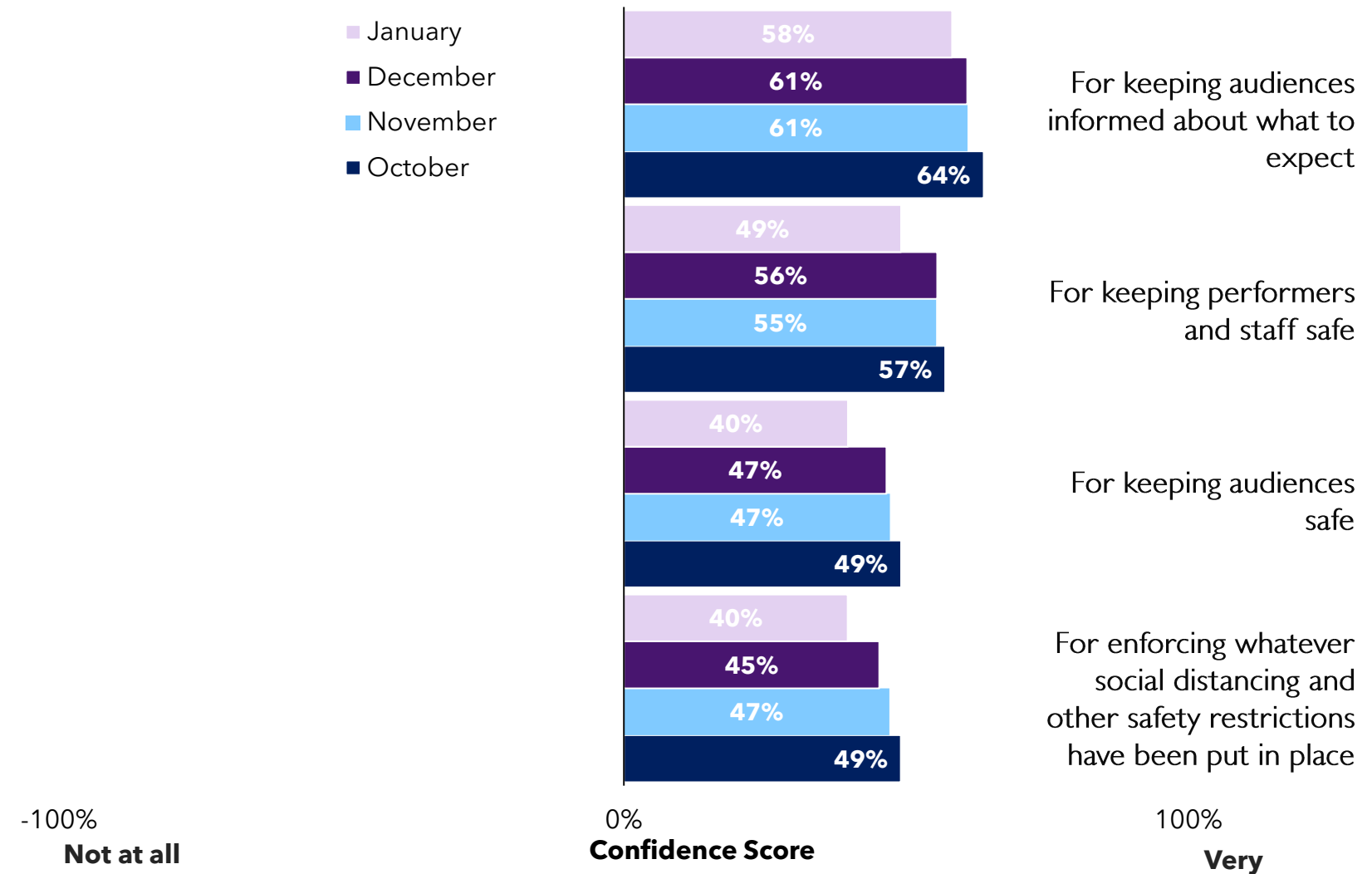
Jan responses:

Under 35 n = 137; 34-44 n = 227;

45-54 n = 476; 55-64 n = 812;

65-74 n = 925; 75+n = 301

How confident do you feel that cultural venues and organisations have the appropriate measures in place?



SAFETY MEASURES

- Audiences are most confident that venues will keep them informed about what to expect, but has dropped from 64% in October to 58% in January
- They are less confident that venues will keep them safe and enforce social distancing and other safety measures

October n = 4,946
 November n = 6,887
 December n = 4,596
 January n = 5,045

How would you feel about the following measures being considered or implemented by some cultural organisations?



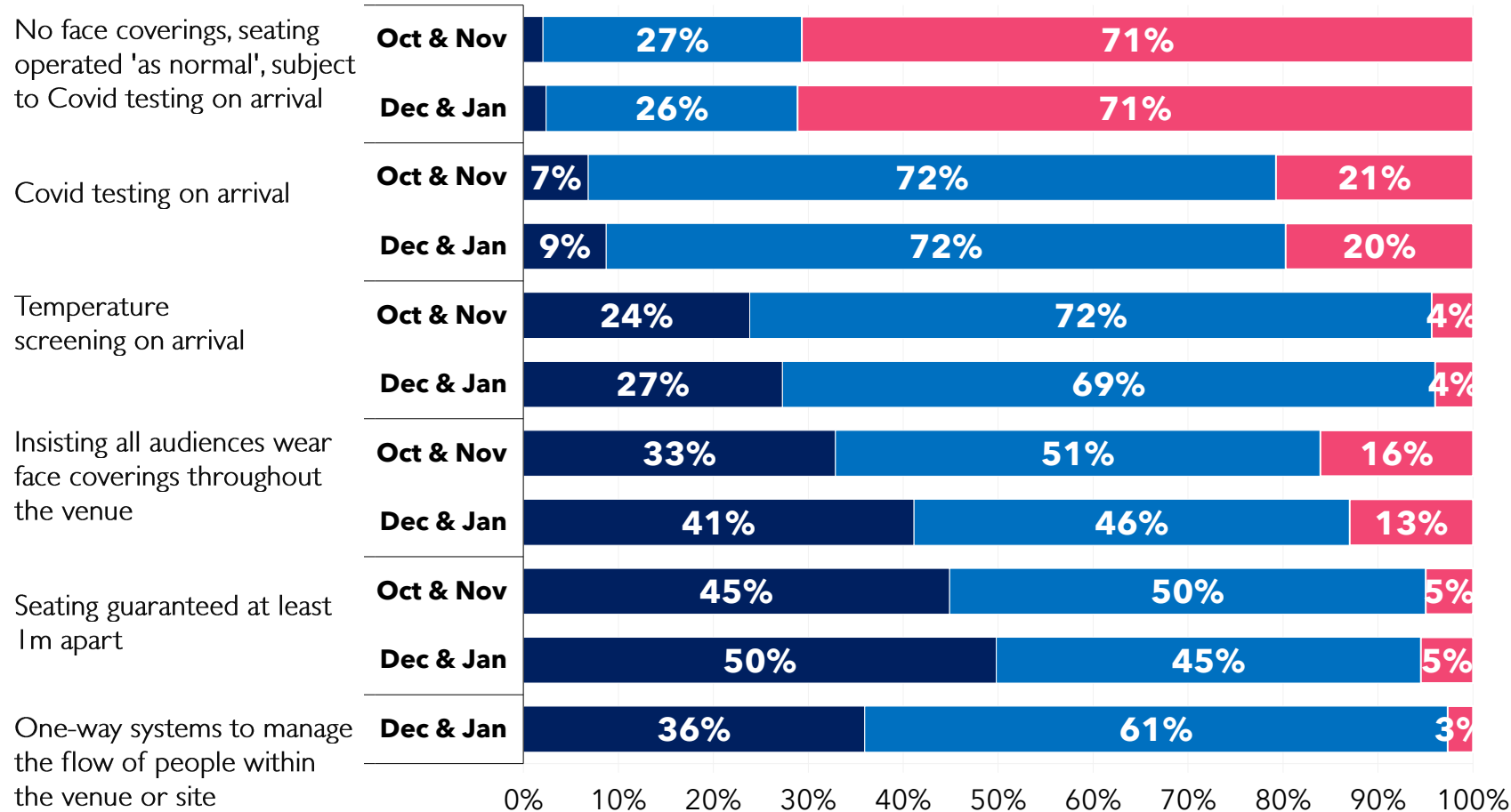
SAFETY MEASURES

- A consistent majority of respondents would feel uncomfortable about no face coverings and no social distancing subject to Covid testing on arrival
- Face coverings and distanced seating have become more important

Oct & Nov n = 11,791

Dec & Jan n = 10,006

■ This would be essential for me ■ I'm OK with this ■ I feel uncomfortable about this



Attitudes to attending cultural events again



STILL NOT READY

THOSE READY TO BOOK WITHIN THE NEXT 6 MONTHS FELL FOR THE FIRST TIME IN JANUARY AT SAME TIME AS INCREASE IN THOSE WAITING FOR A VACCINE TO 35%

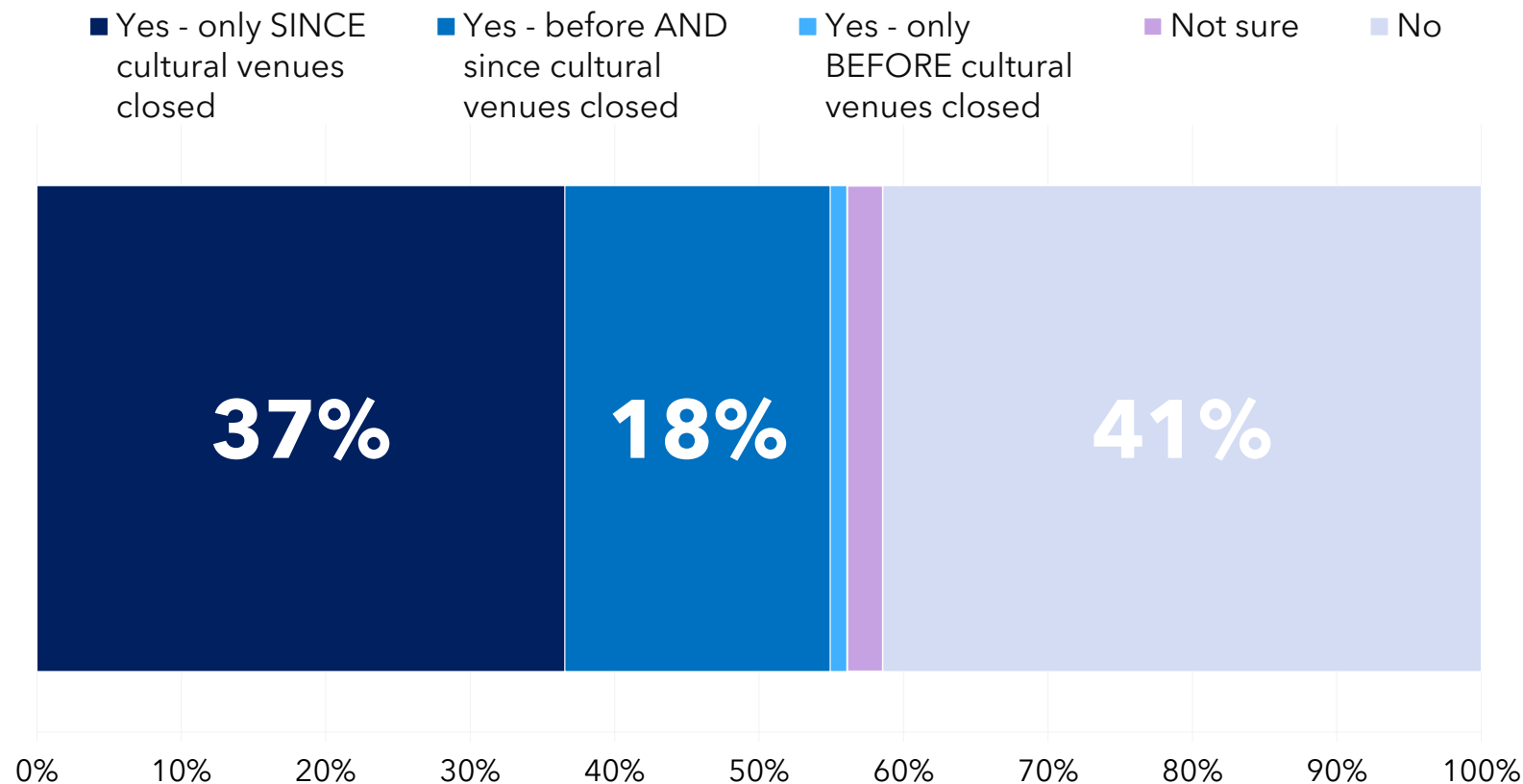


SAFETY FIRST

71% WOULD STILL FEEL UNCOMFORTABLE ABOUT NO FACE COVERINGS AND NO SOCIAL DISTANCING

Digital engagement with culture

Have you engaged with any culture ONLINE, either before or since cultural venues closed?



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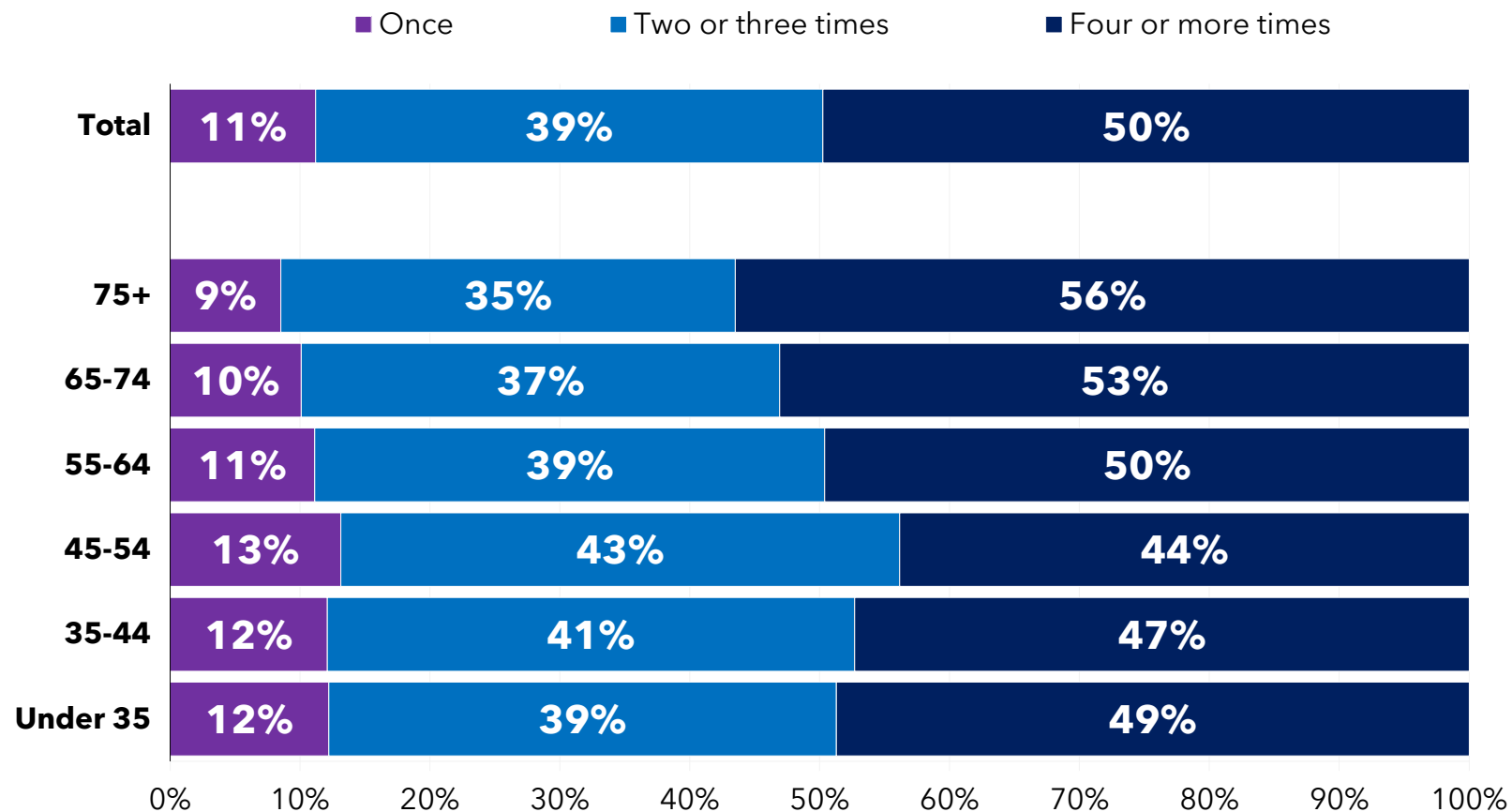


DIGITAL ENGAGEMENT

- 55% of respondents have engaged with culture online since venues closed in March 2020
- Most of which had only started engaging online since lockdown

n = 21,868

How MANY times have you engaged with culture ONLINE since cultural venues closed?



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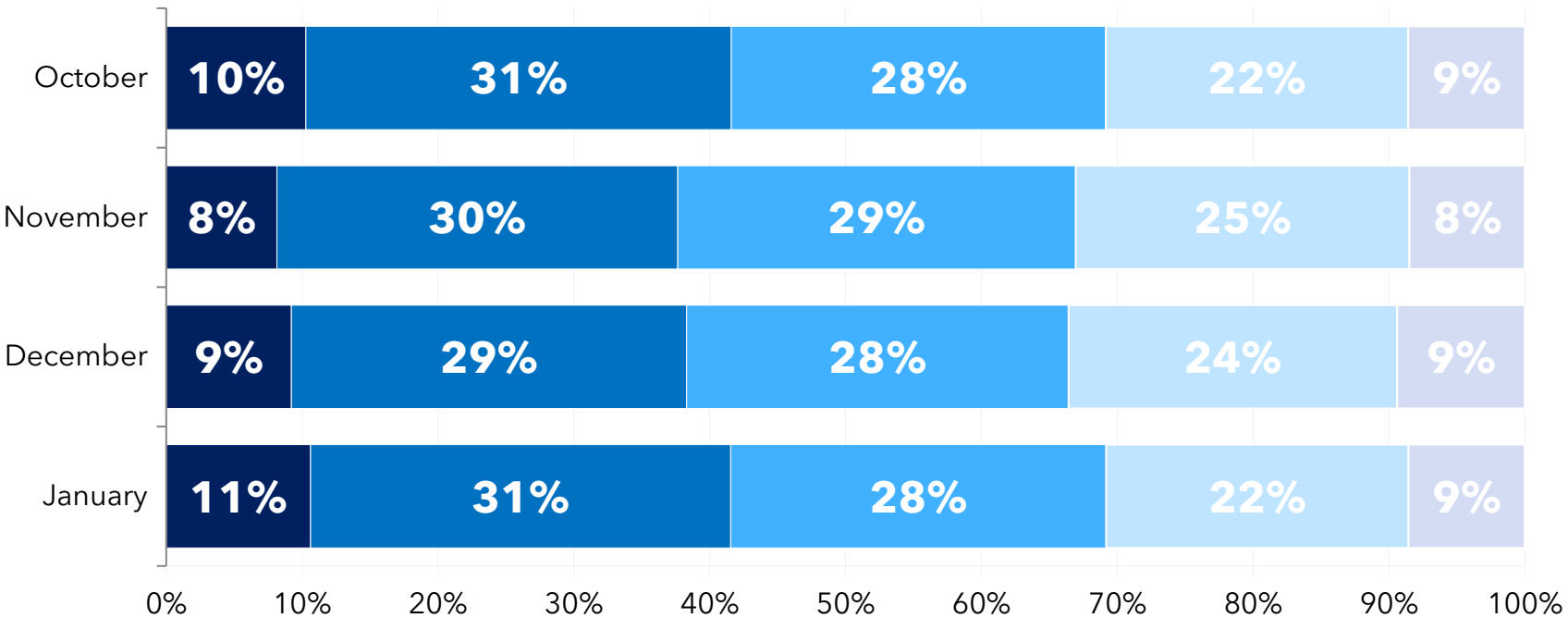
FREQUENCY OF DIGITAL ENGAGEMENT

- Of those who have engaged since venues closed, 50% have done so four or more times
- Only a minority 11% have only engaged once online

n = 12,270

How interested are you in engaging with culture **ONLINE** in the future?

Very interested
Interested
Neutral
Not really interested
Not at all interested



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INTEREST IN DIGITAL IN FUTURE

- Those very interested or interested in engaging with culture online increased in January

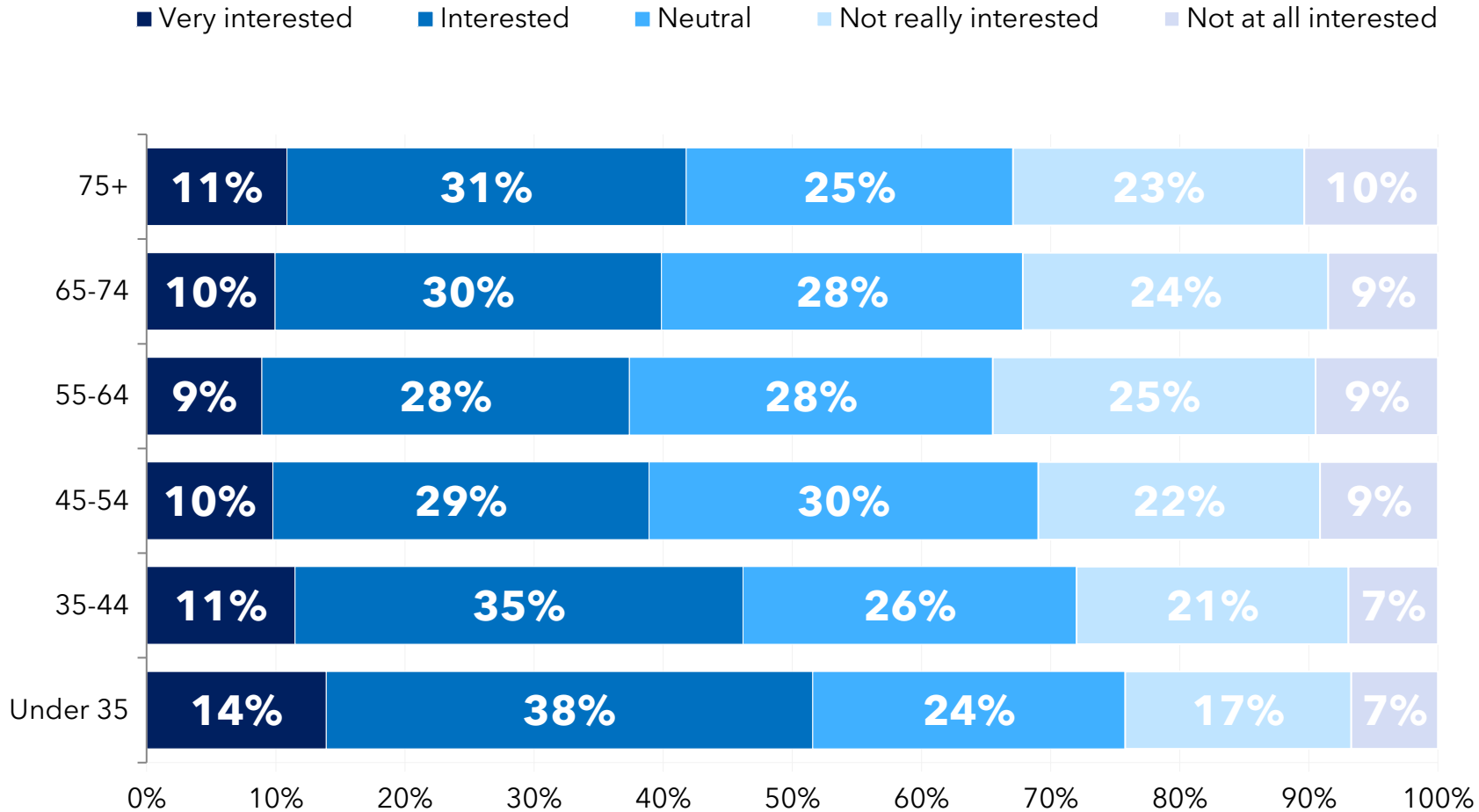
October n = 4,946

November n = 6,887

December n = 4,775

January n = 5,265

How interested are you in engaging with culture **ONLINE** in the future?

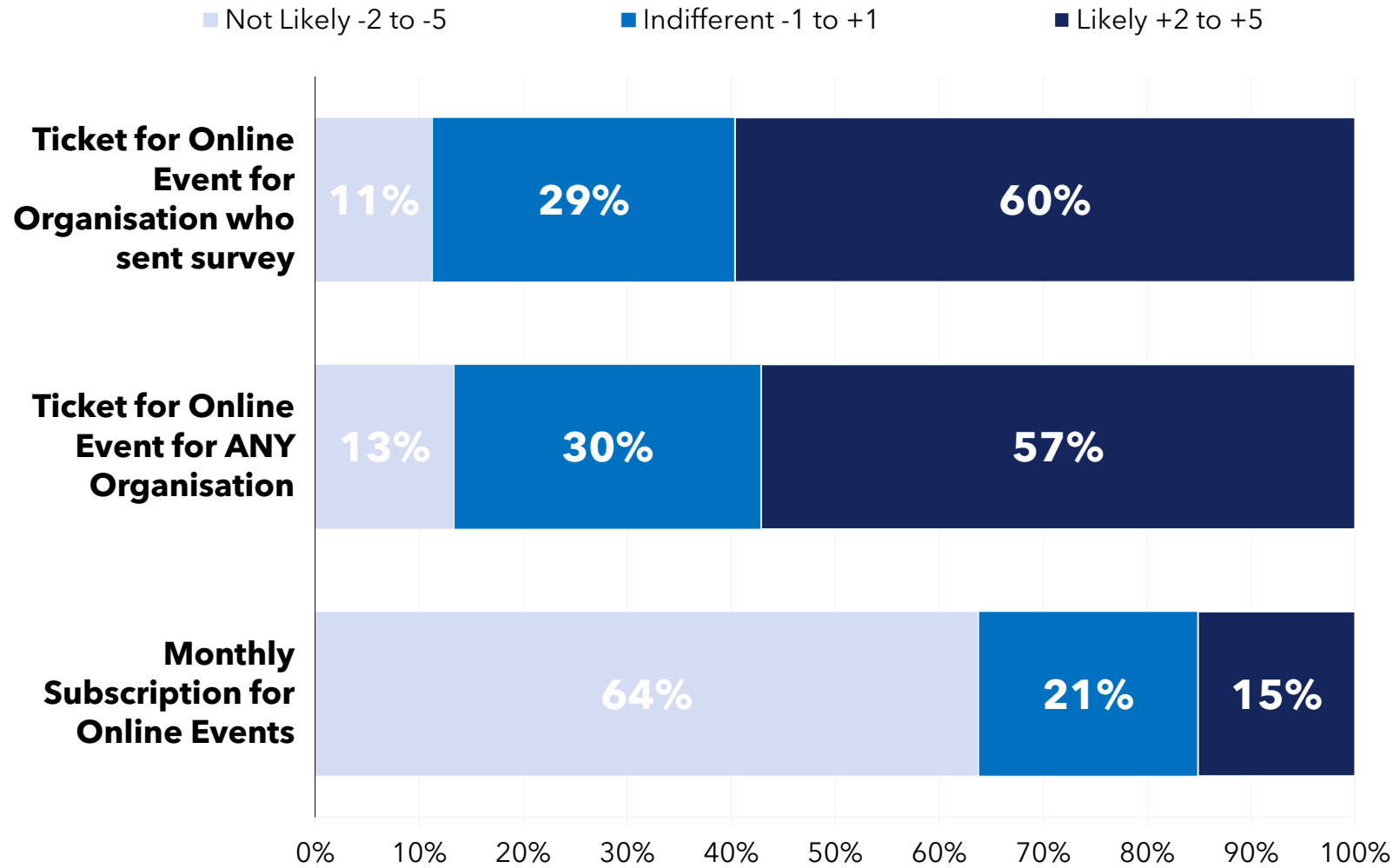


INTEREST IN DIGITAL IN FUTURE

- Under 45s are slightly more interested in engaging with culture online in future

December and January Responses:
 Under 35 n = 446; 34-44 n = 879;
 45-54 n = 1,761; 55-64 n = 3,037;
 65-74 n = 2,917; 75+n = 802

How likely would you be to buy a...?



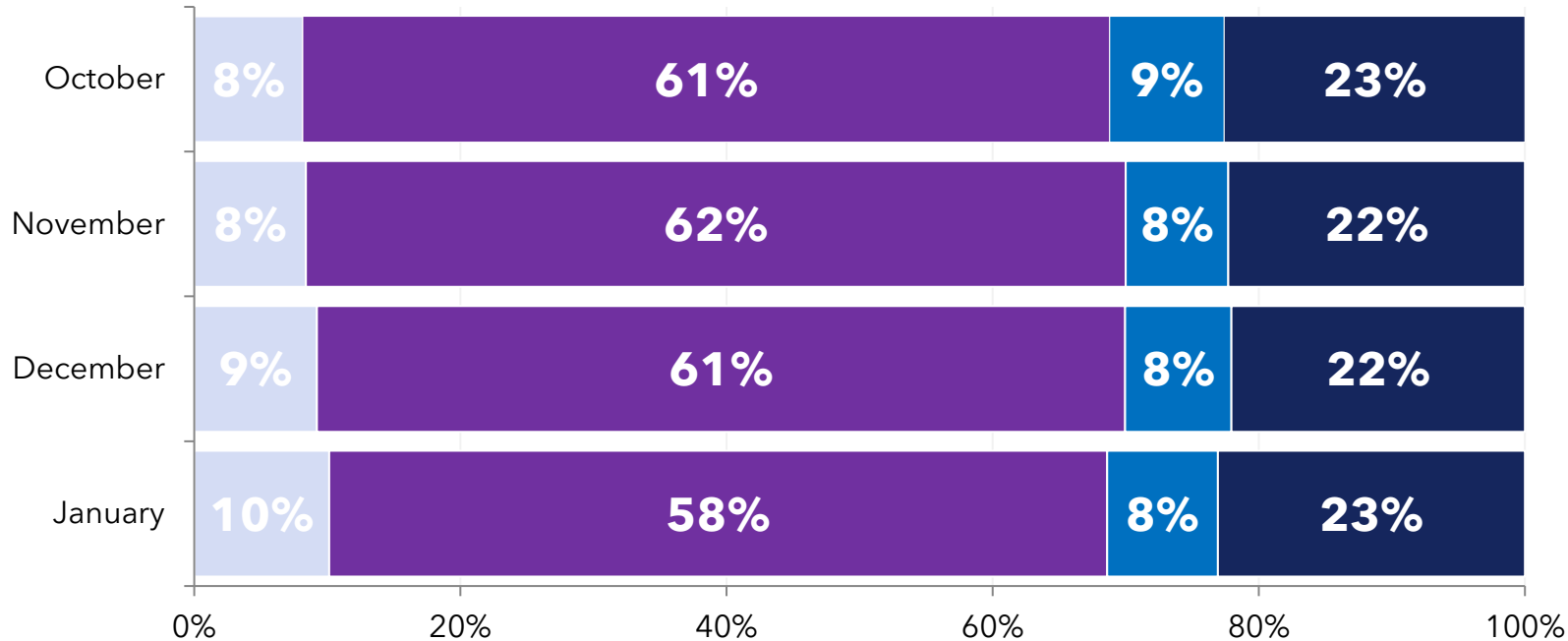
TICKETS FOR DIGITAL EVENTS

- 60% of respondents expressed interest in buying tickets for online events from the organisations they were surveyed by
- 15% of respondents would be likely to buy a monthly subscription to online events

n = 8,059; 13,039; 12,782

Which of the following would most closely describe your attitude to online culture once you are attending a suitable variety of live performances in person?

- I'd probably not engage with online events and/or activities at all
- I'd be less likely to engage with online culture, but I would still consider online events that I wouldn't otherwise have a chance to see live
- I'd also engage with culture online, but only for free content
- I'd also engage with and pay for events online



DIGITAL CULTURE VS IN PERSON ATTENDANCE

- The proportion of respondents who would continue to pay for digital events in future has remained stable

October n = 3,243

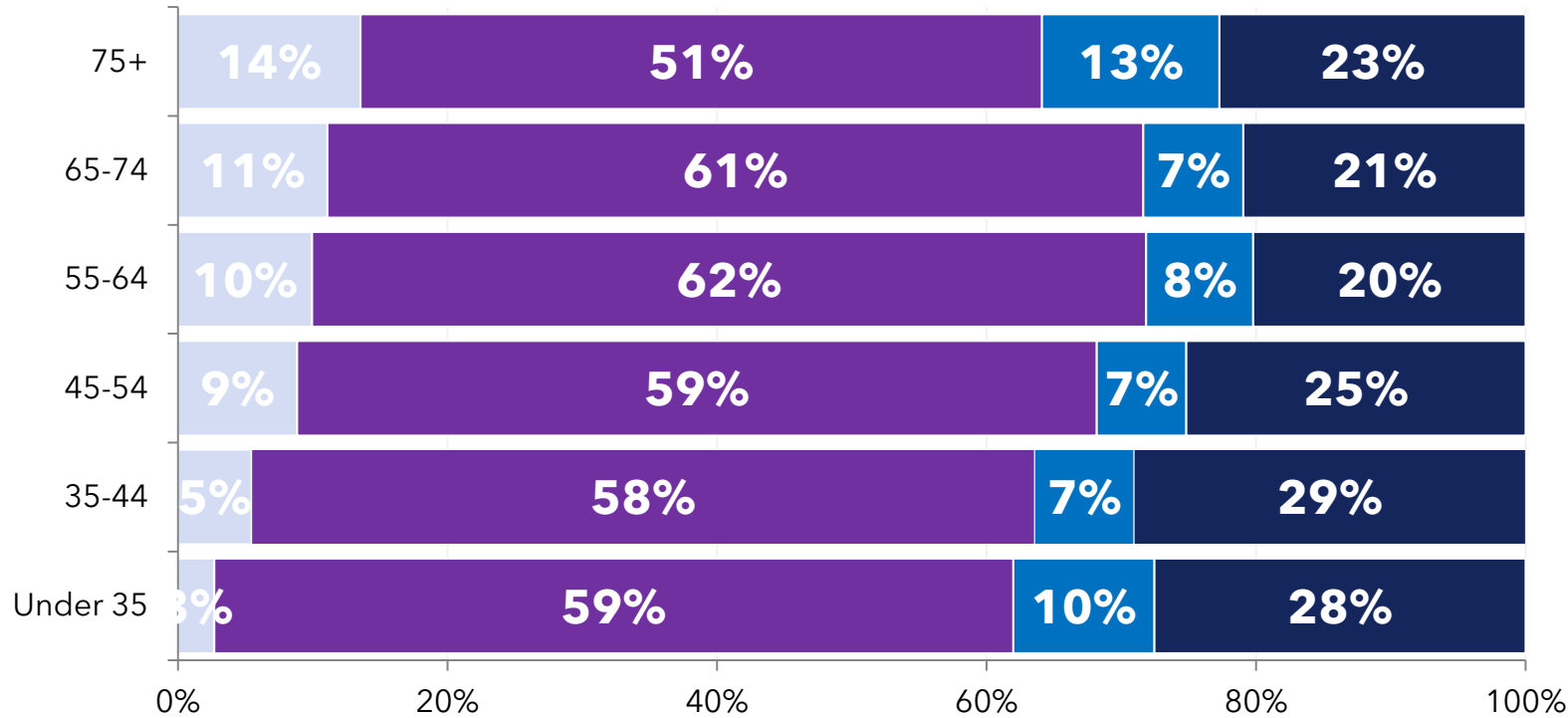
November n = 4,335

December n = 3,066

January n = 3,618

Which of the following would most closely describe your attitude to online culture once you are attending a suitable variety of live performances in person?

- I'd probably not engage with online events and/or activities at all
- I'd be less likely to engage with online culture, but I would still consider online events that I wouldn't otherwise have a chance to see live
- I'd also engage with culture online, but only for free content
- I'd also engage with and pay for events online



DIGITAL CULTURE VS IN PERSON ATTENDANCE

- Under 55s are more likely to engage with and pay for online events in future

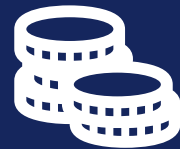
December & January responses

Under 35 n = 334; 34-44 n = 623;

45-54 n = 1,188; 55-64 n = 1,950;

65-74 n = 1,949; 75+n = 524

Interest in digital culture in future



DIGITAL INTEREST

THOSE INTERESTED OR VERY INTERESTED IN DIGITAL IN FUTURE INCREASED FROM 38% IN DECEMBER TO 42% IN JANUARY



DIGITAL IN FUTURE

23% OF RESPONDENTS WOULD CONTINUE TO BUY TICKETS FOR DIGITAL IN FUTURE AND 58% WOULD STILL CONSIDER IT FOR EVENTS THEY COULD NOT SEE LIVE

Key Takeaways: Returning to Live Events

Only 15% of respondents who have not yet returned to in-person cultural experience **would consider booking within the next three months**, down from 26% during October to December

The proportion of audiences **waiting for a vaccine** before attending **has increased to 35%**, compared to 25% in November and 14% in July

Over half of respondents say that **socially distanced seating would be essential to their return** to cultural organisations, with only 6% saying they would be uncomfortable with this measure in place

Key Takeaways: Audiences for Digital

Those **very interested or interested in engaging with culture online increased** in January

With a small **increase in proportion of people who would pay** for digital content

Audiences, especially younger audiences under 45, are still expressing an **interest in engaging with online content when live events resume**

Are you
signed up?

A LARGER DATA SET ENABLES:

- EVER-MORE NATIONALLY REPRESENTATIVE
- GRANULAR SEGMENTATION

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RESPONSES DASHBOARD

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