



CULTURE
RESTART

Culture Restart audience tracker

Wave 6

March 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



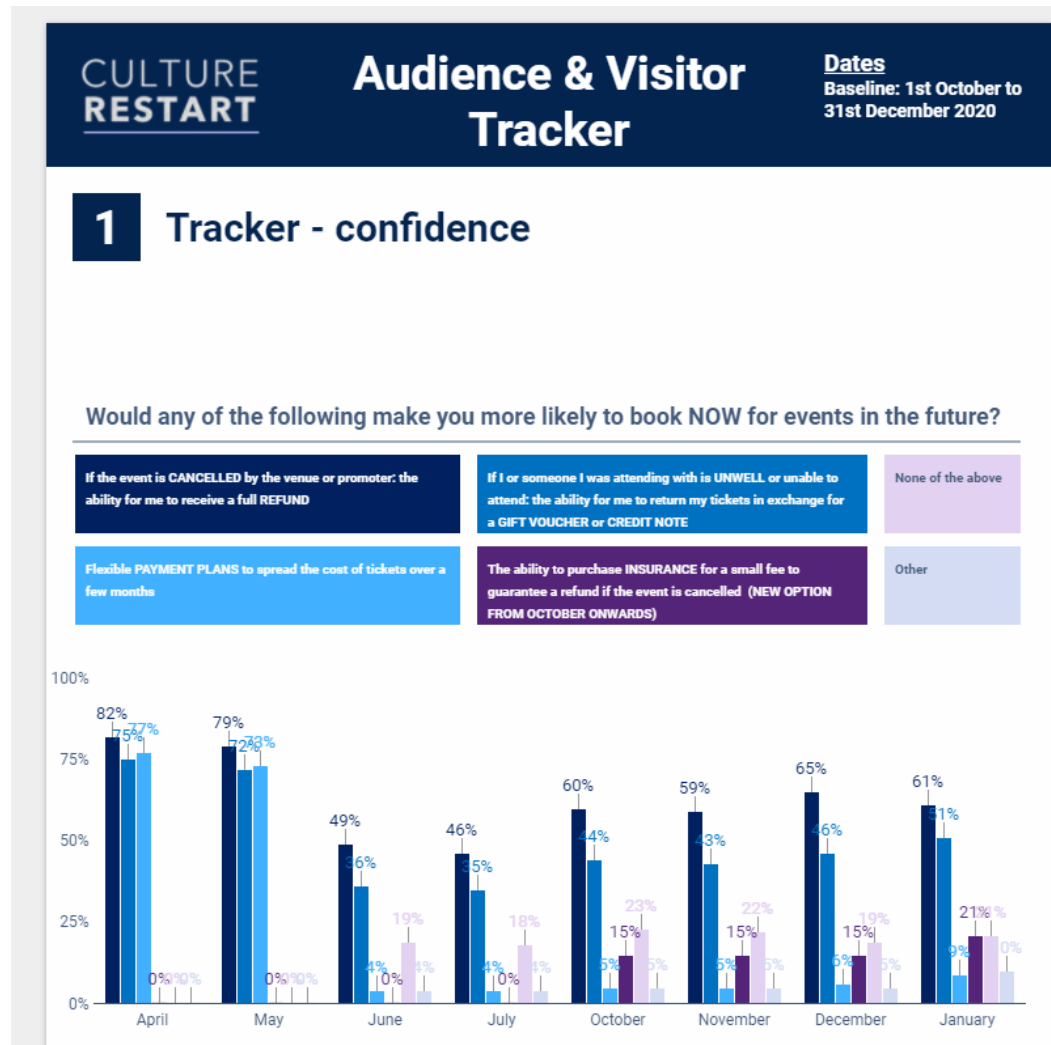
Assess the appeal of **digital** content and willingness to pay for it, both before and after reopening

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 March 2021- and will be regularly updated to include further months from our ongoing research.
- [Browse the dashboard](#)

Survey Overview



RESPONSES

42,129



WAVE 1: OCT 2020, 4,941

WAVE 2: NOV 2020, 6,887

WAVE 3: DEC 2020, 4,775

WAVE 4: JAN 2021, 5,265

WAVE 5: FEB 2021, 5,771

WAVE 6: MAR 2021, 14,490



PARTICIPATING ORGANISATIONS

70

Respondent profile



AGE

36% OVER 65

14% UNDER 45



LOCATION

97% FROM OUTSIDE
LONDON



FINANCES

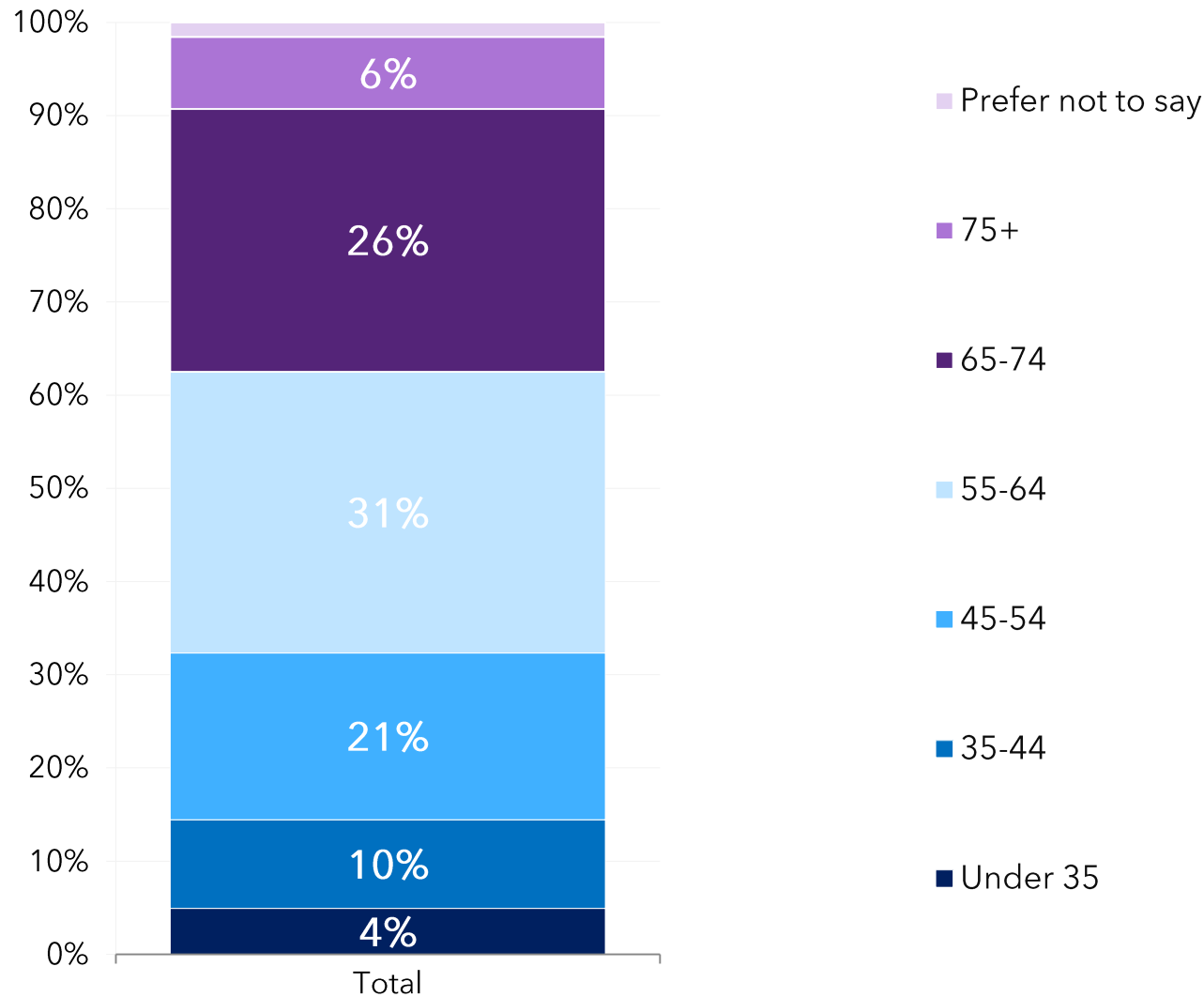
20% HAVE LOST INCOME



VULNERABLE

25% CLASSIFIED AS
VULNERABLE

Respondents by age



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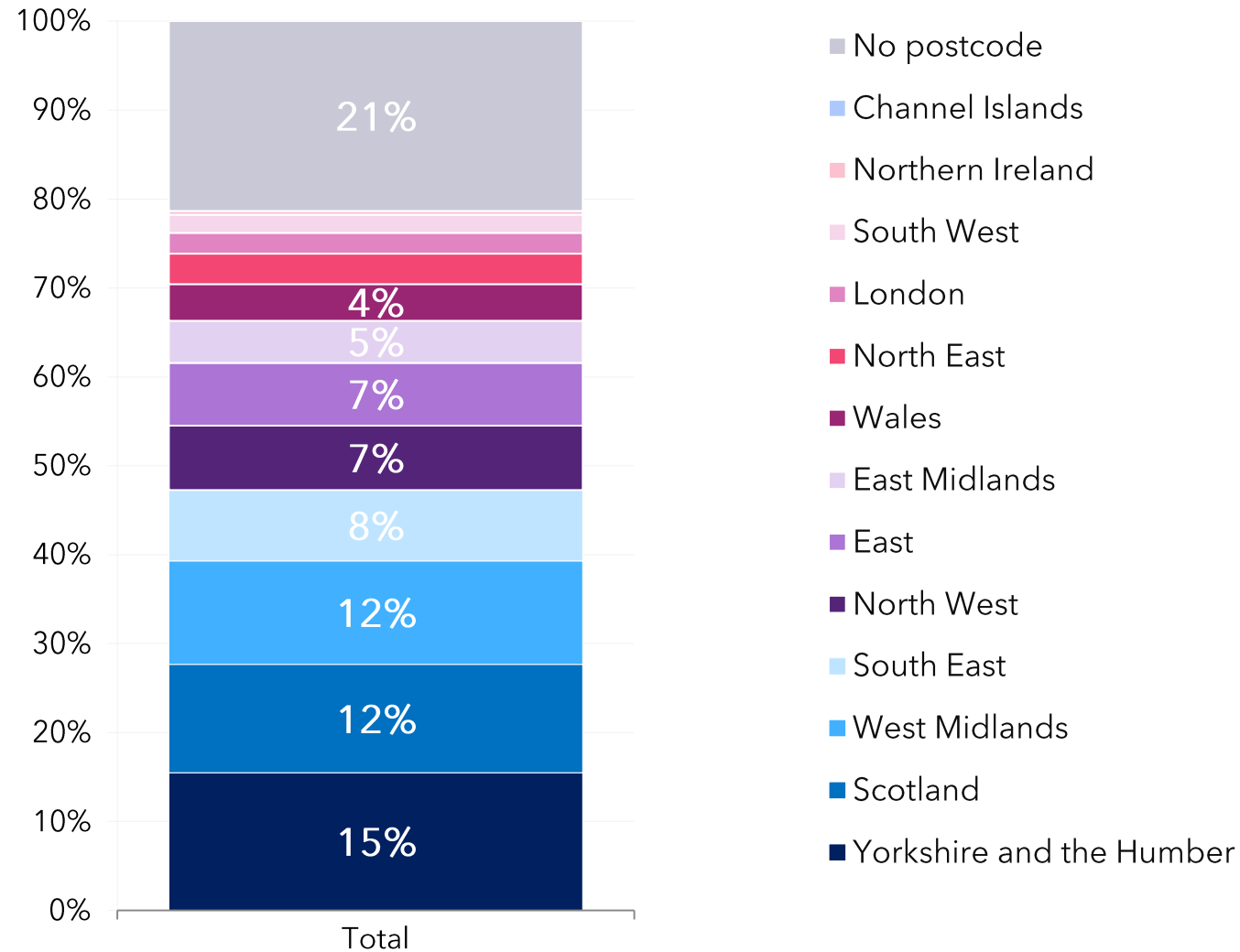


AGE

- 36% of respondents are 65 or older
- 52% of respondents are aged between 45 and 64
- 14% of respondents are 44 or younger

n = 41,867

Respondents by region



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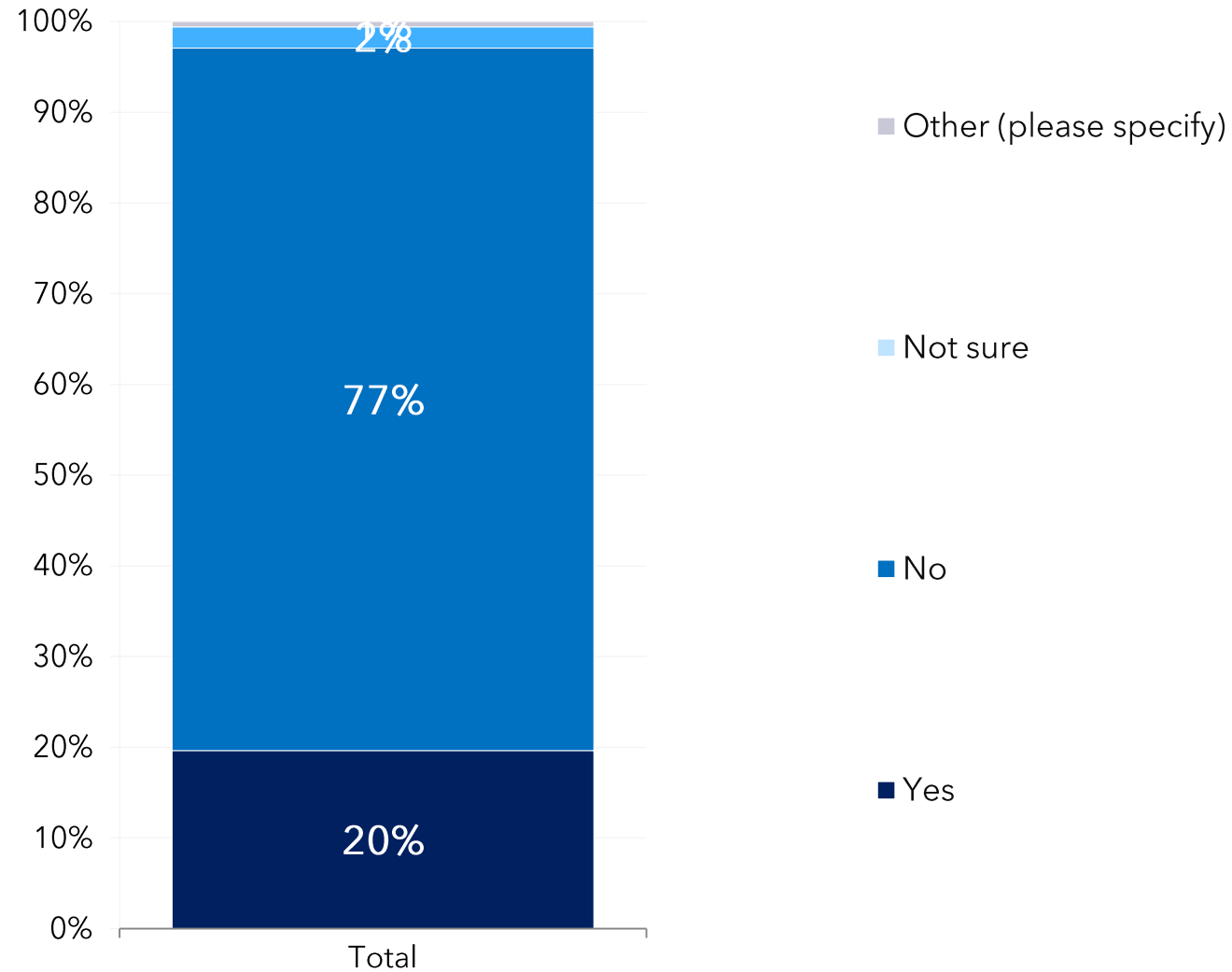


REGION

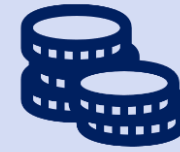
- There is a good spread of responses across each region of the UK
- Of those with a postcode 97% are outside of London

n = 42,129

Respondents by change in income



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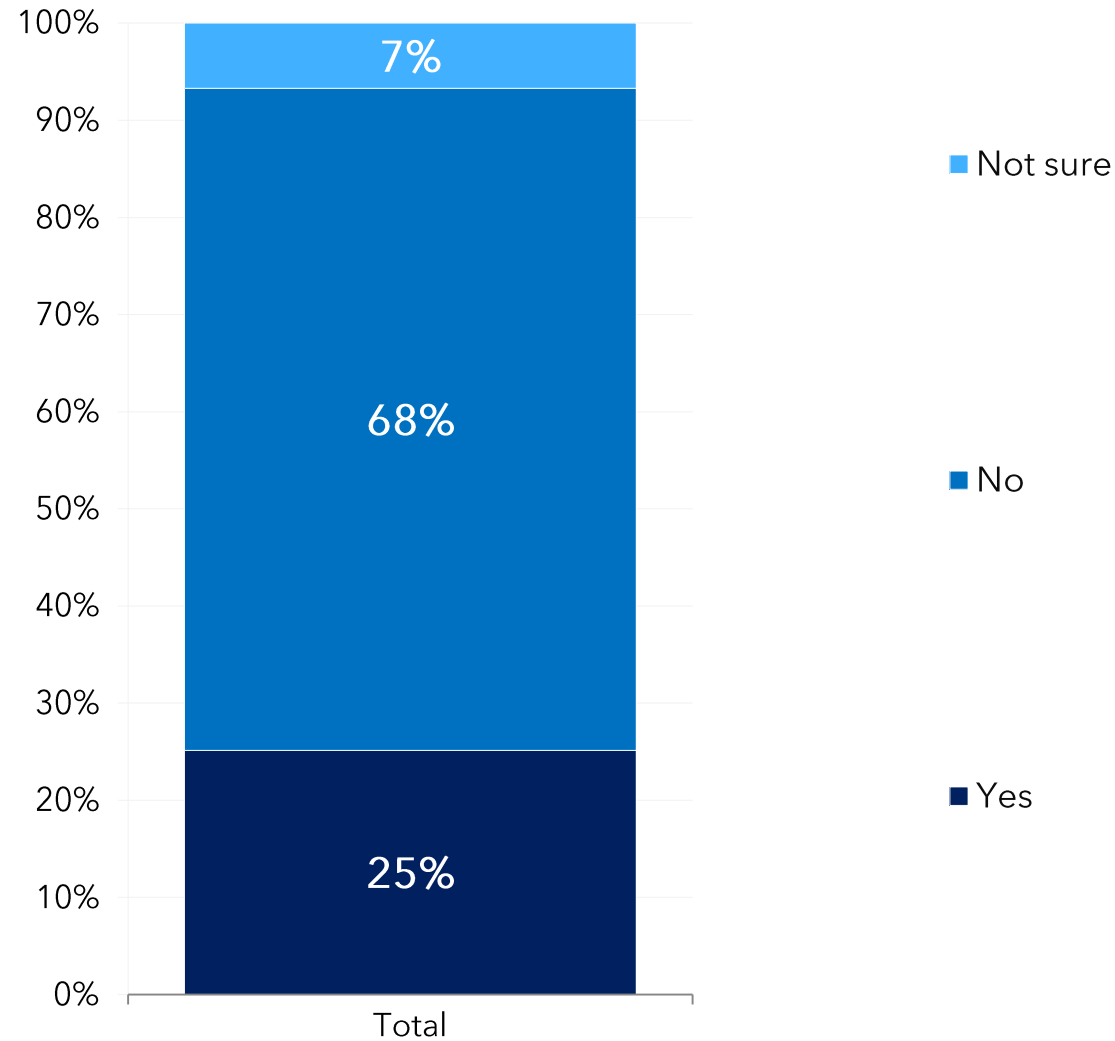


CHANGE IN INCOME

- 20% of respondents have lost income

n = 41,406

Respondents by vulnerability



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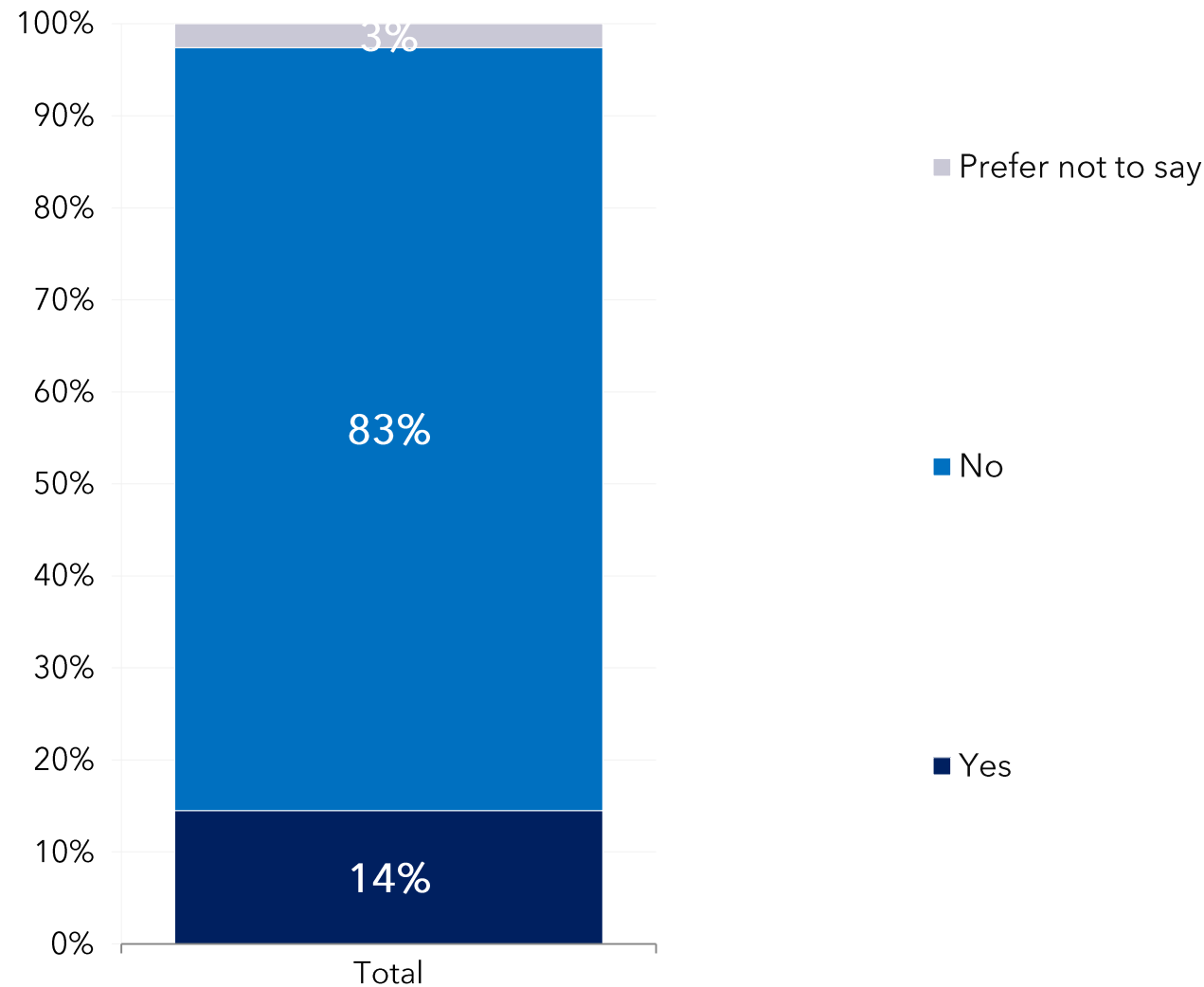


VULNERABILITY

- 25% of respondents are vulnerable to COVID-19

n = 41,641

Respondents by D/deaf and disabled



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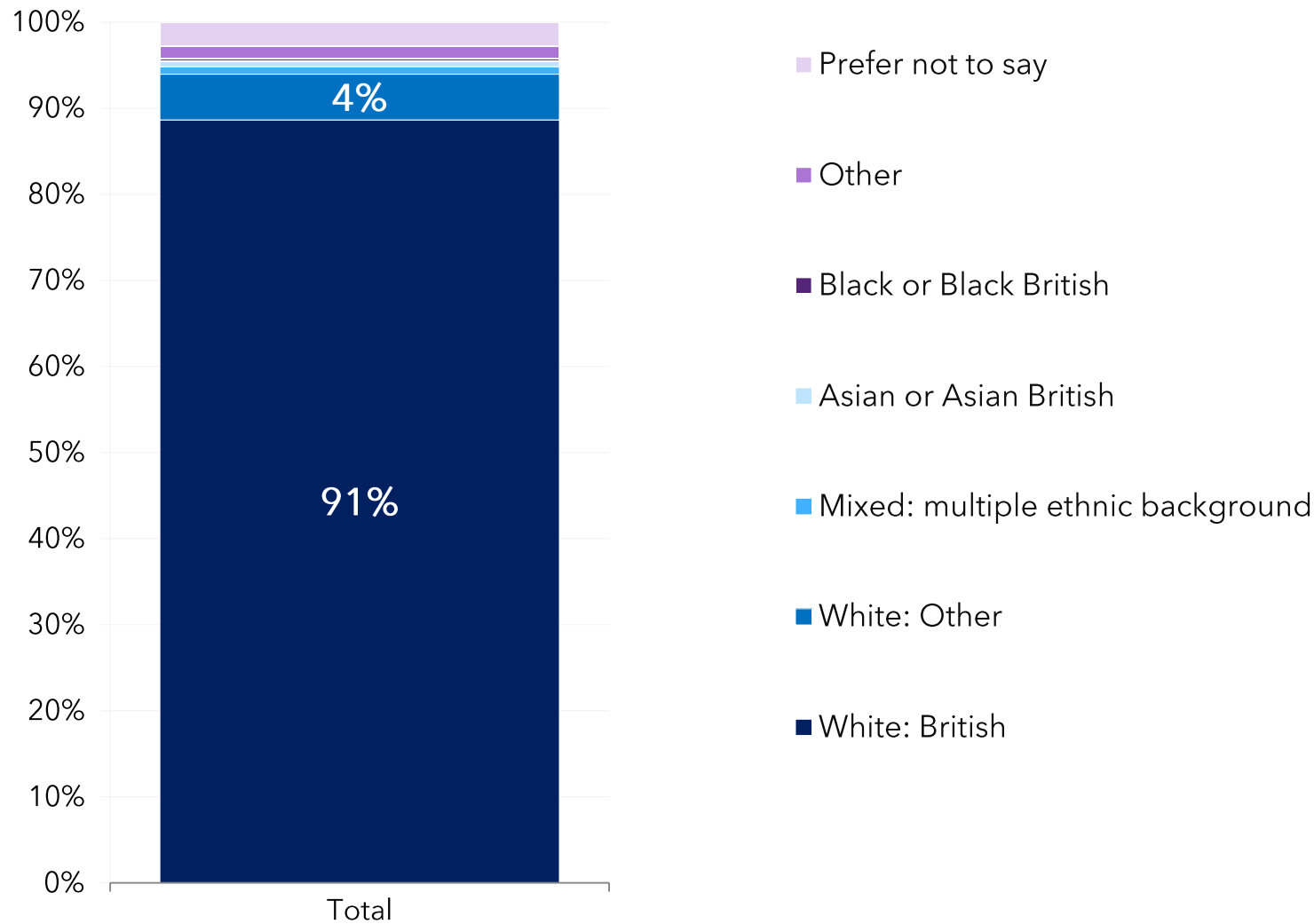


D/deaf or DISABLED

- 14% of respondents identify as D/deaf or disabled

n = 41,492

Respondents by ethnicity

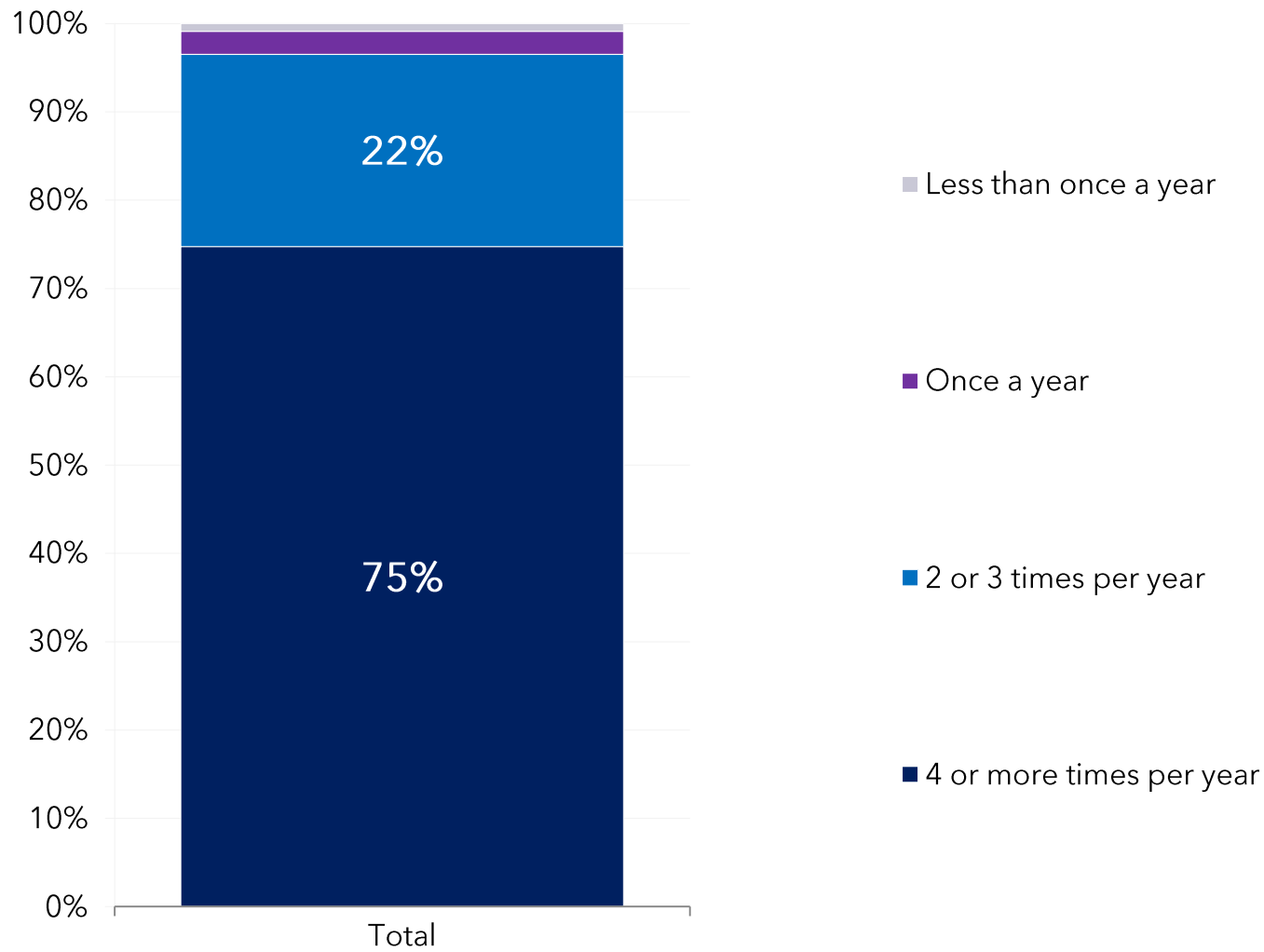


ETHNICITY

- 91% of respondents identify as White British
- 4% of respondents identify as White Other

n = 41,697

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

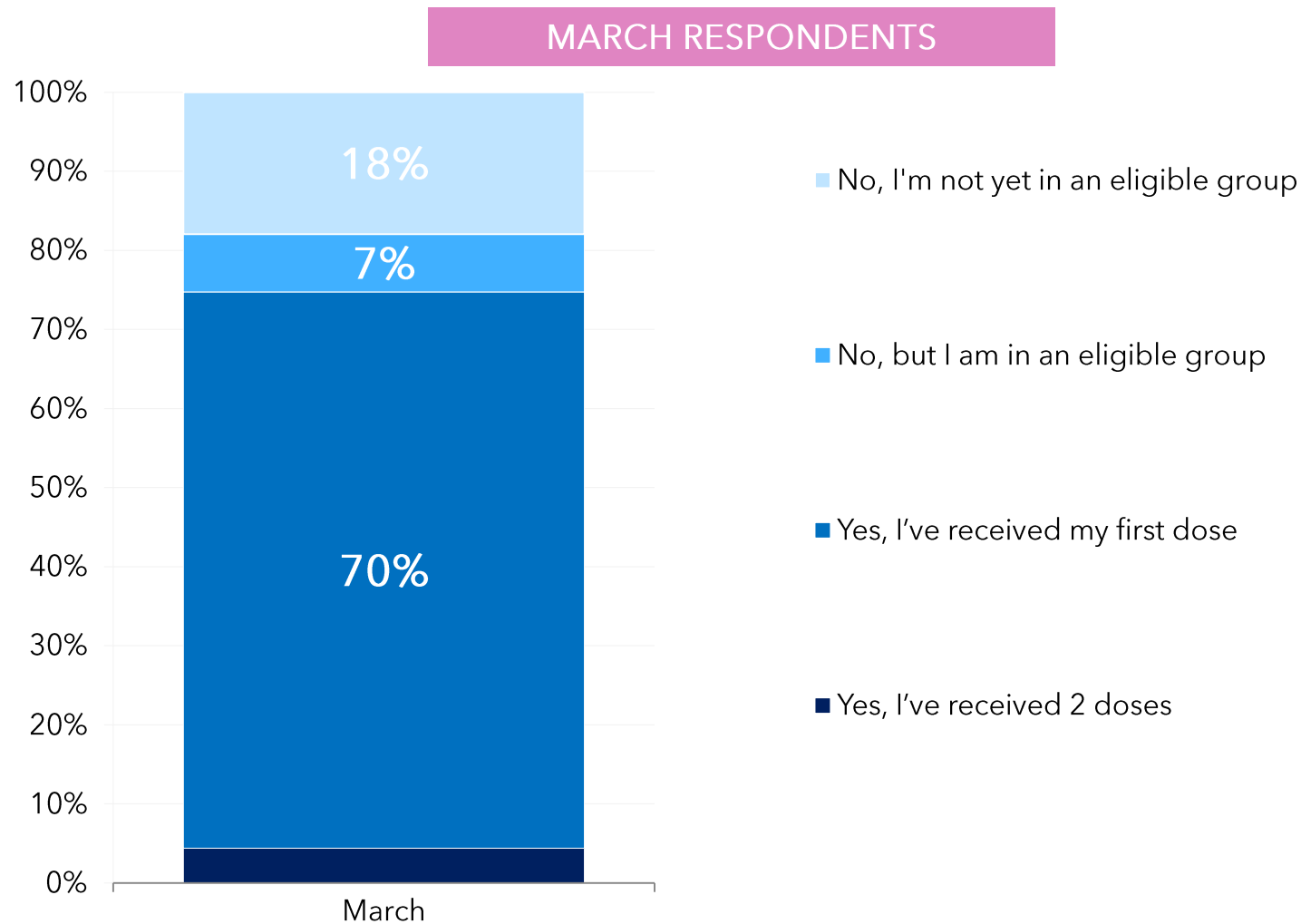


HOW OFTEN?

- 75% of respondents were attending or visiting 4 or more times a year pre-Covid

n = 42,066

Have you received a Covid-19 vaccine?



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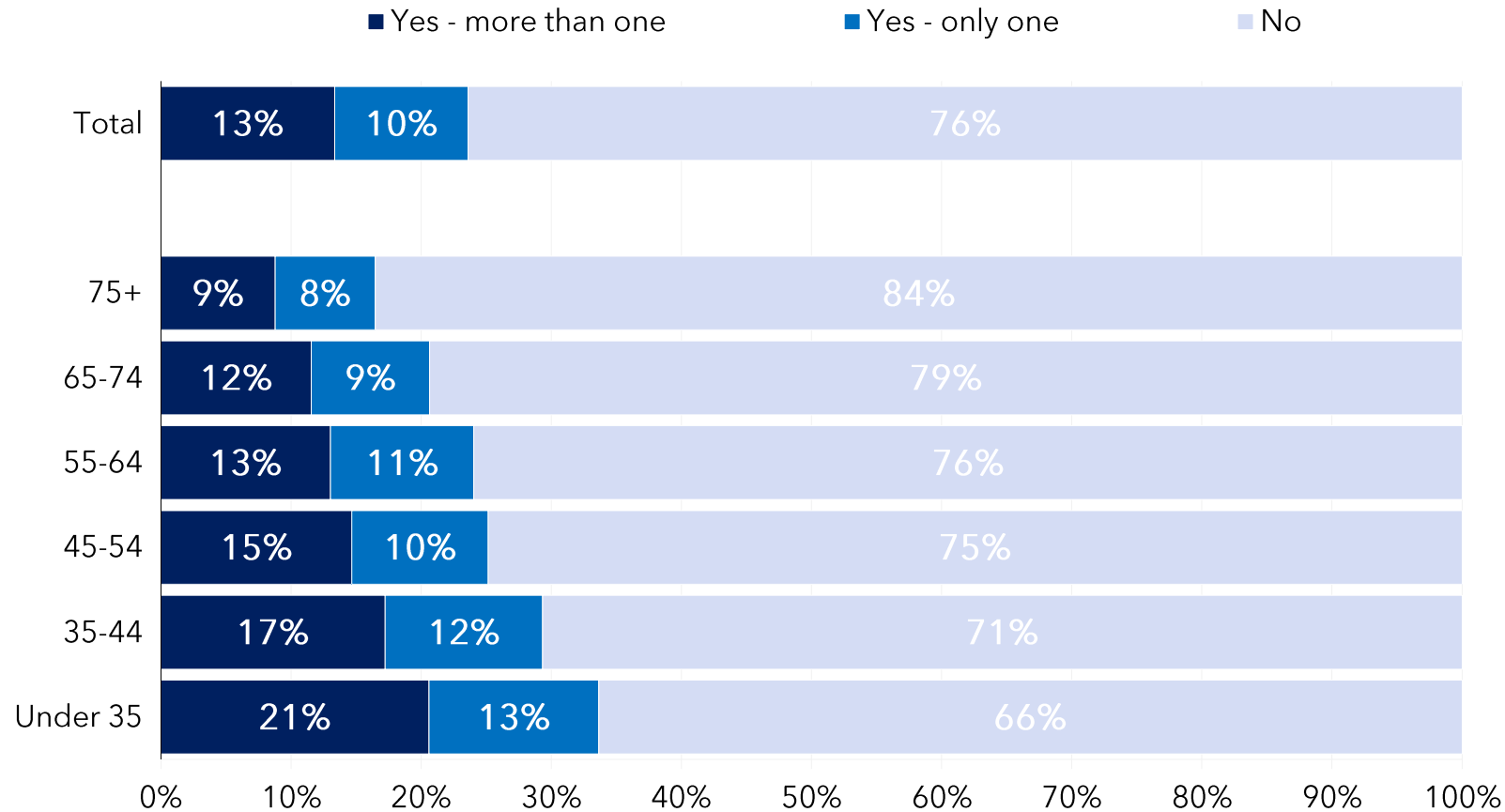
VACCINATION

- Nearly 75% of March respondents have had at least one dose of the vaccine

March n = 14,324

Attendance since Covid- 19

Have you attended (in person) any cultural events, activities or venues since July 2020?

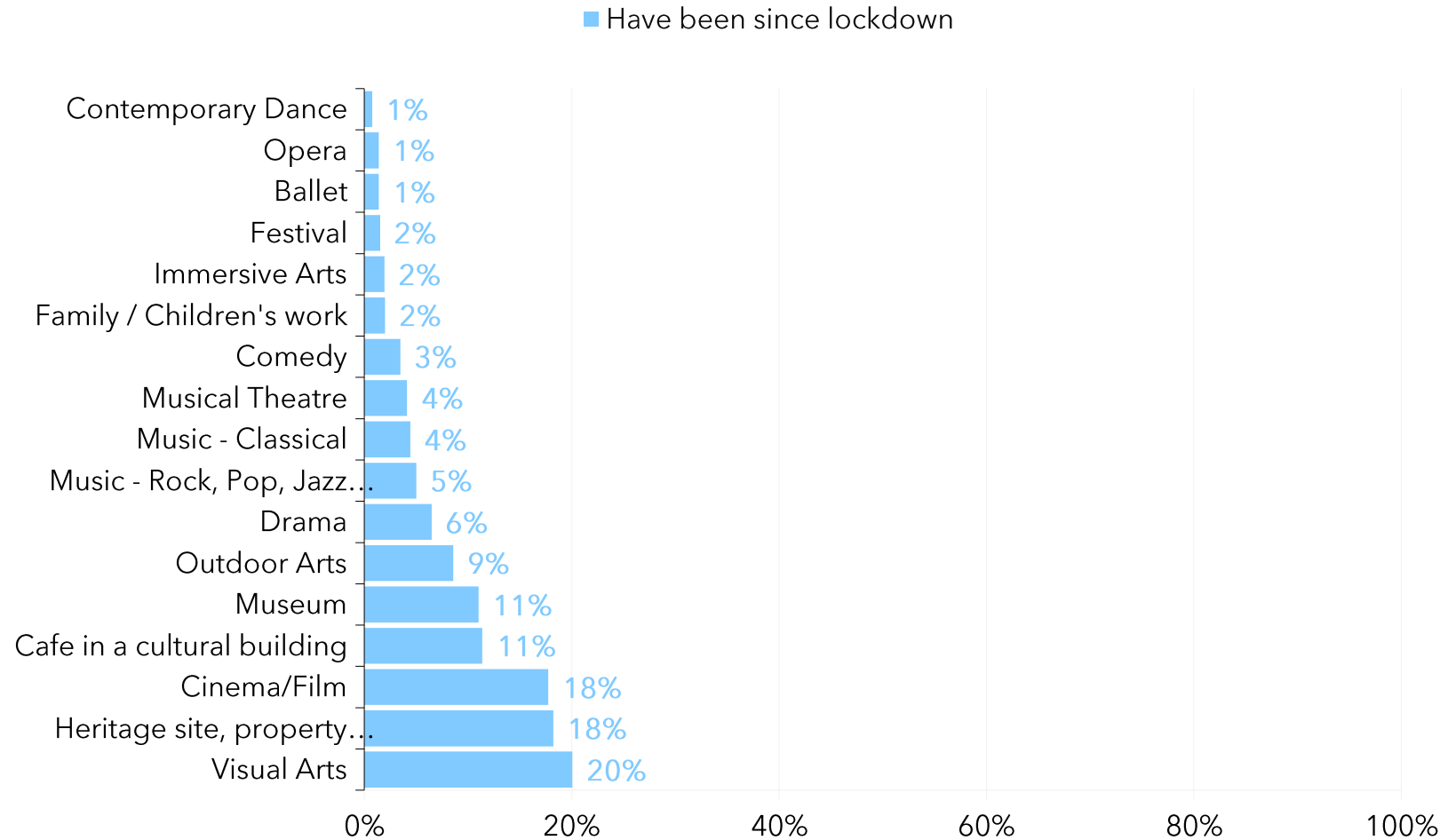


ATTENDANCE SINCE COVID

- 23% of respondents have attended a cultural event since July 2020
- Younger people are more likely to have attended events since re-opening, including multiple events
- Over 75s are least likely

n = 41,867

Which types of venues and activities have you attended since July 2020?



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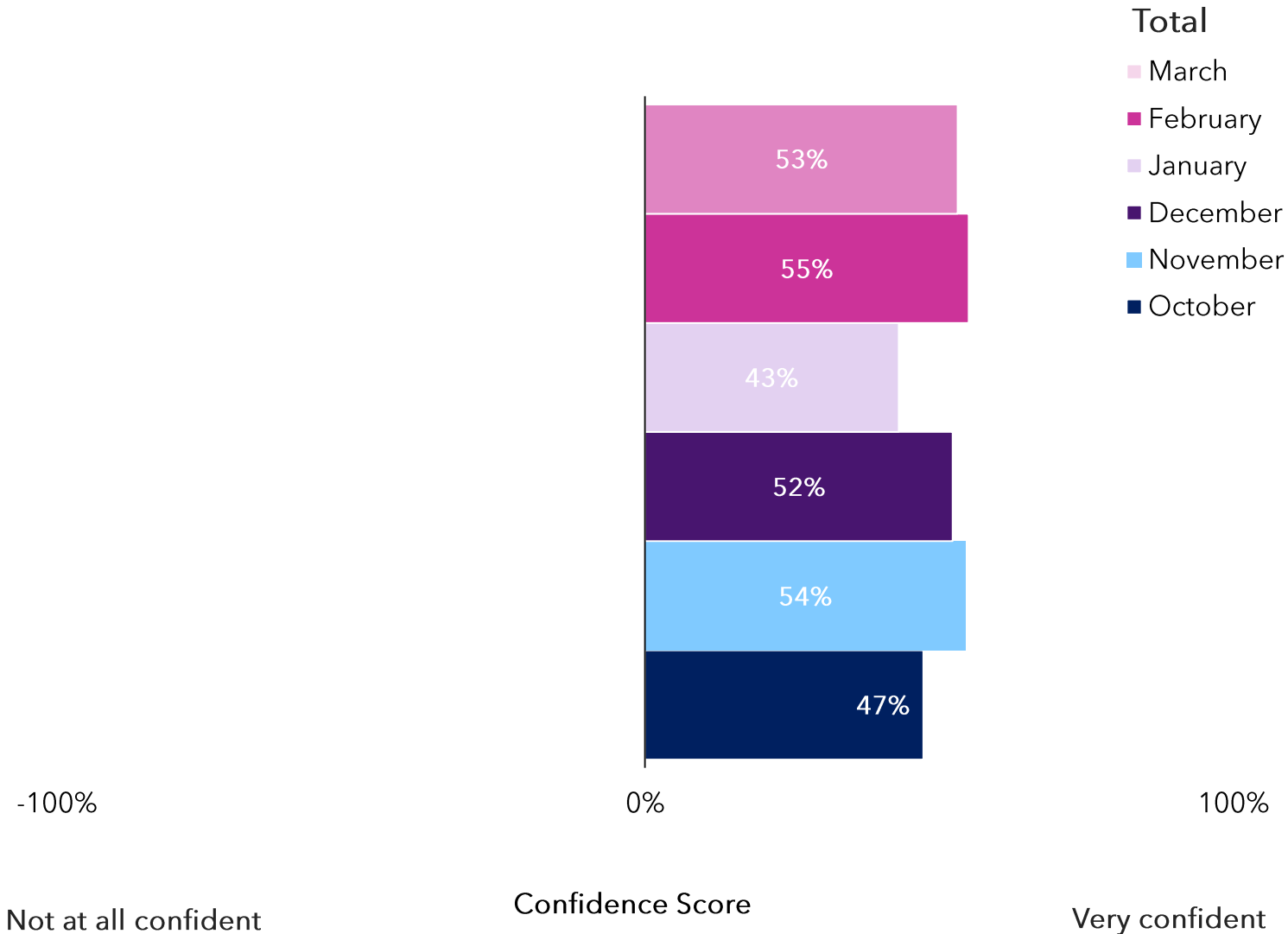


WHAT EVENT?

- 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

Attendances since lockdown total n = 20,550

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



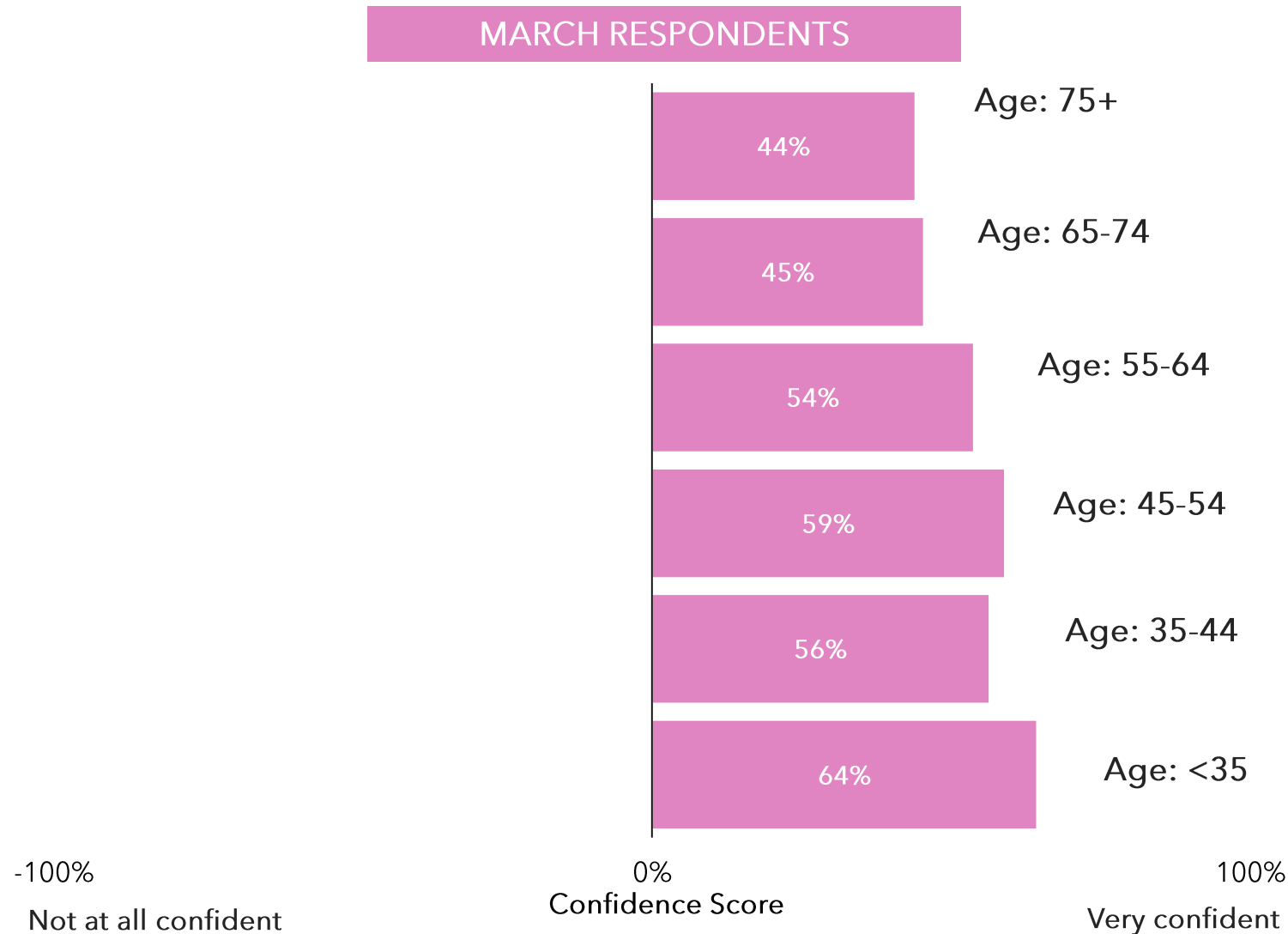
CULTURE RESTART

CONFIDENCE

- Among those who have attended, the net confidence score has increased from its low of 43% in Jan

October n = 1,172	January n = 1,095
November n = 1,431	February n = 1,236
December n = 1,004	March n = 3,286

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

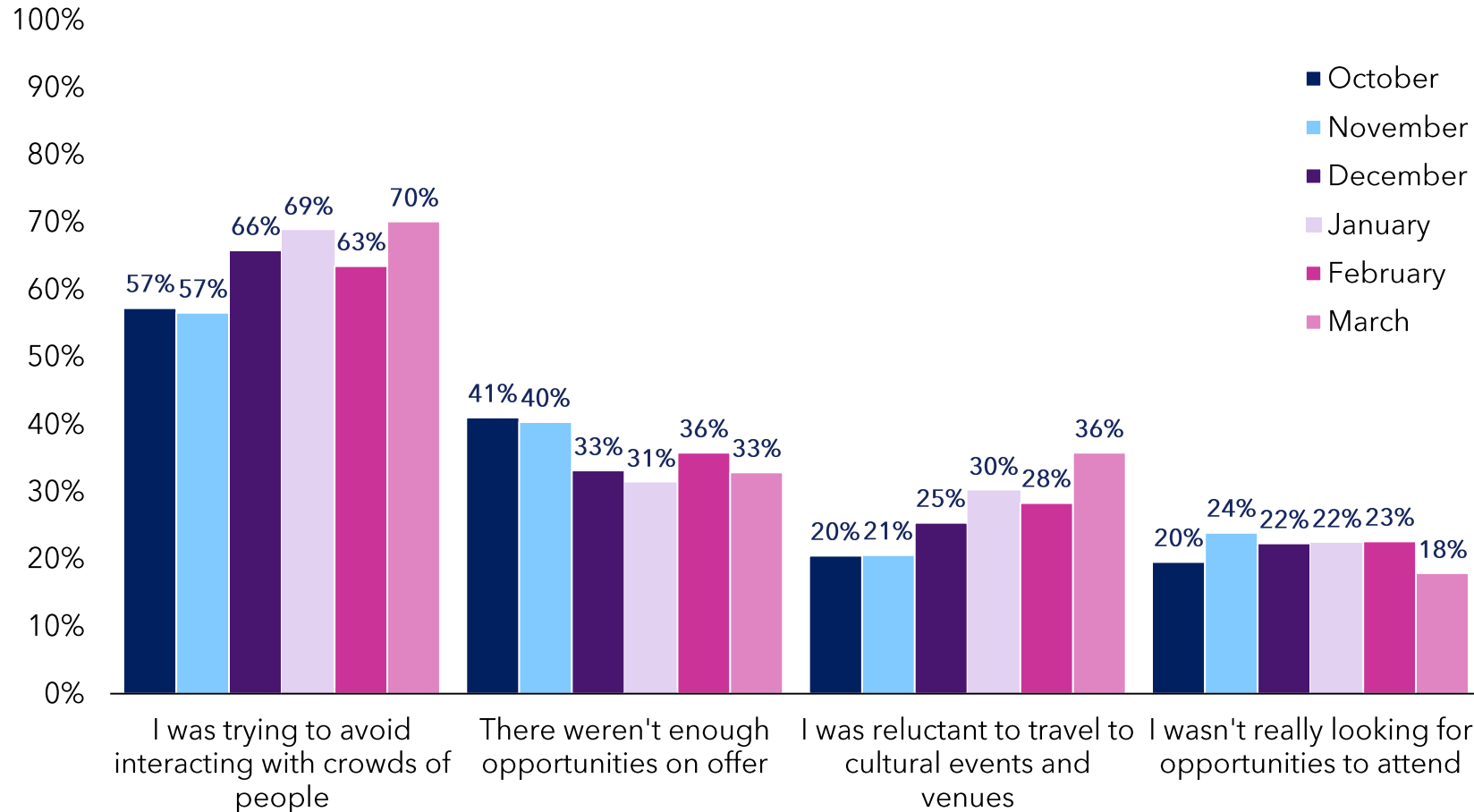


CONFIDENCE

- Under 35s are more likely to feel confident than older age groups having attended a cultural event
- Confidence has increased across all age groups since January

March n = 3,286

If you did not attend, why is that?



REASONS FOR NOT ATTENDING

- Concerns about crowds and reluctance to travel were the main reasons among March respondents

October n = 3,710	January n = 4,082
November n = 5,289	February n = 4,435
December n = 3,700	March n = 10,990

Attendance since Covid- 19



RETURNED

23% OF RESPONDENTS HAVE ATTENDED A CULTURAL EVENT SINCE JULY 2020

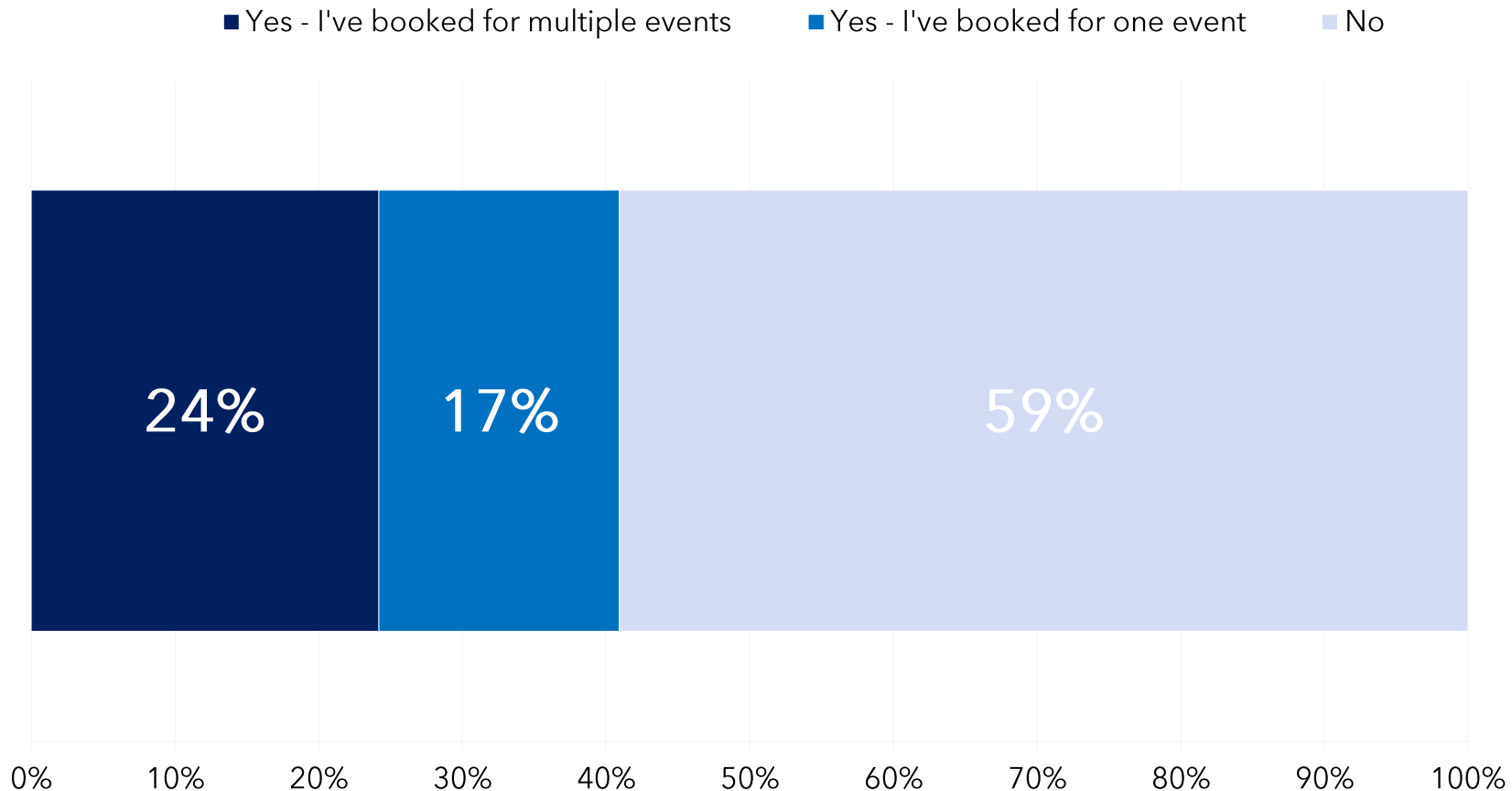


CONFIDENT

CONFIDENCE AMONG THOSE WHO HAVE ATTENDED HAS BOUNCED BACK SINCE JANUARY, REACHING +53% IN MARCH

Bookings for future events

Have you made bookings for any cultural events or planned any visits or activities in the future?



FUTURE EVENTS

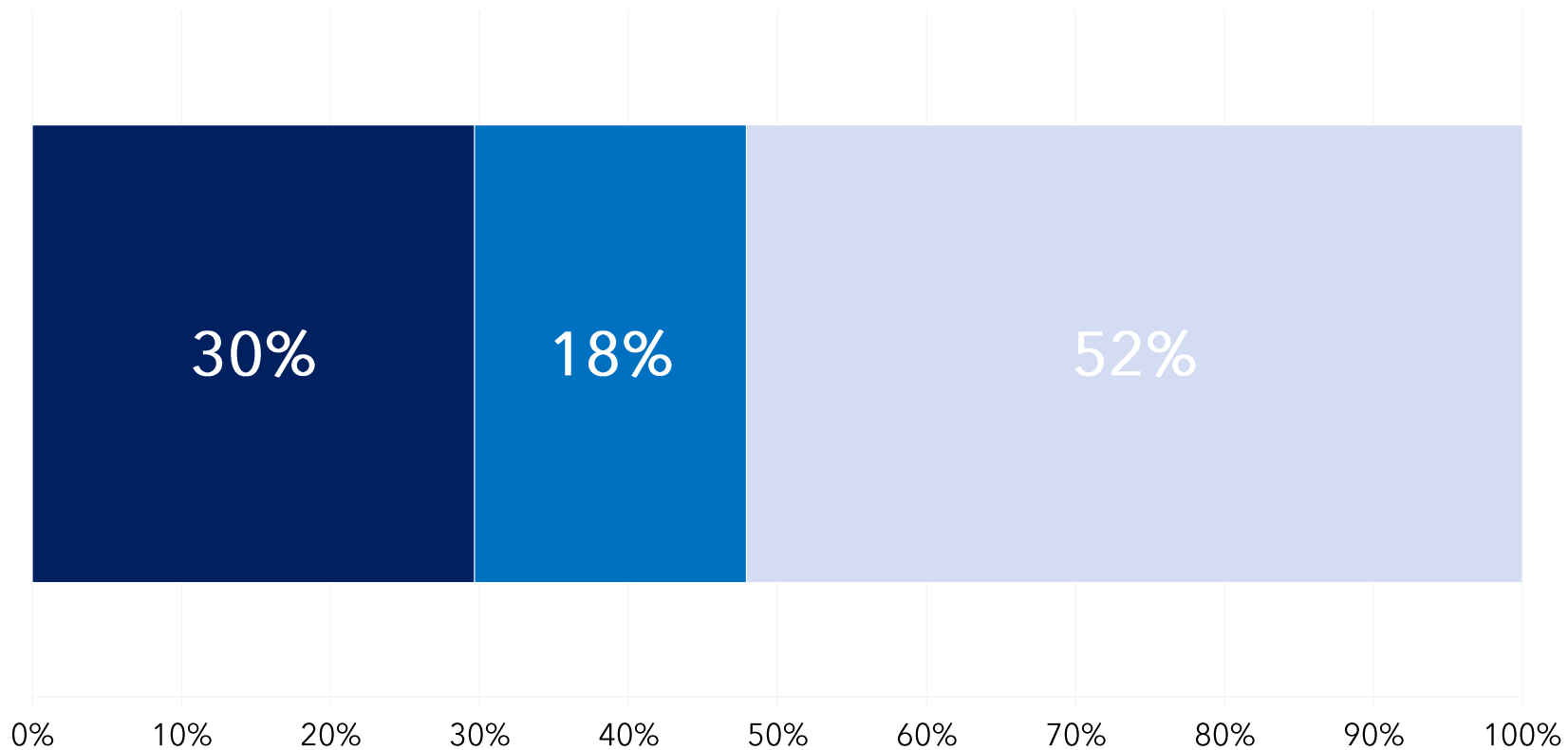
- 41% of respondents have booked future events
- Those who have booked are more likely to have booked for multiple events than one event

n = 42,129

Have you made bookings for any cultural events or planned any visits or activities in the future?

MARCH RESPONDENTS

■ Yes - I've booked for multiple events ■ Yes - I've booked for one event ■ No



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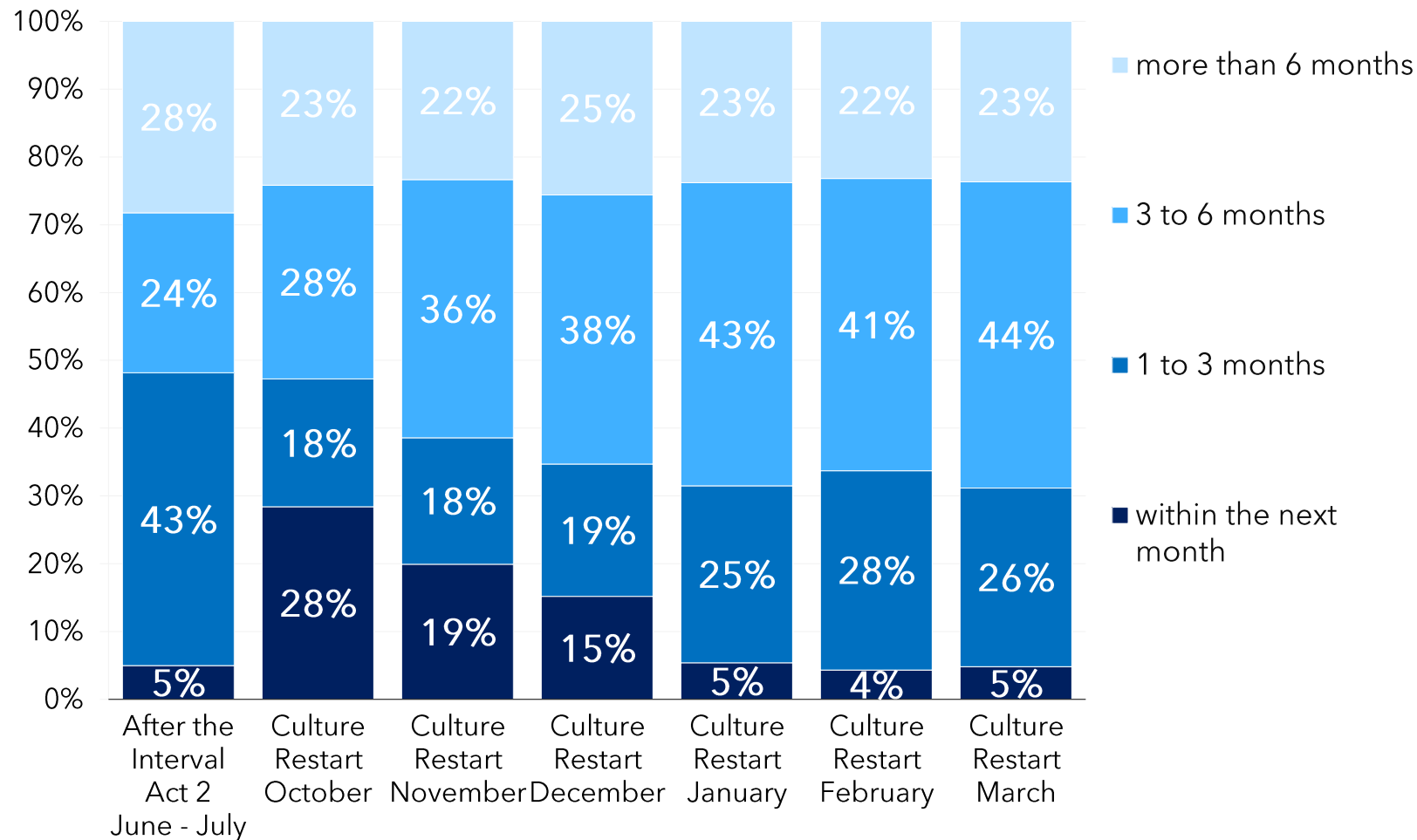


FUTURE EVENTS

- Just looking at March respondents, 48% of respondents have booked future events
- Those who have booked are more likely to have booked for multiple events than one event

n = 14,490

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

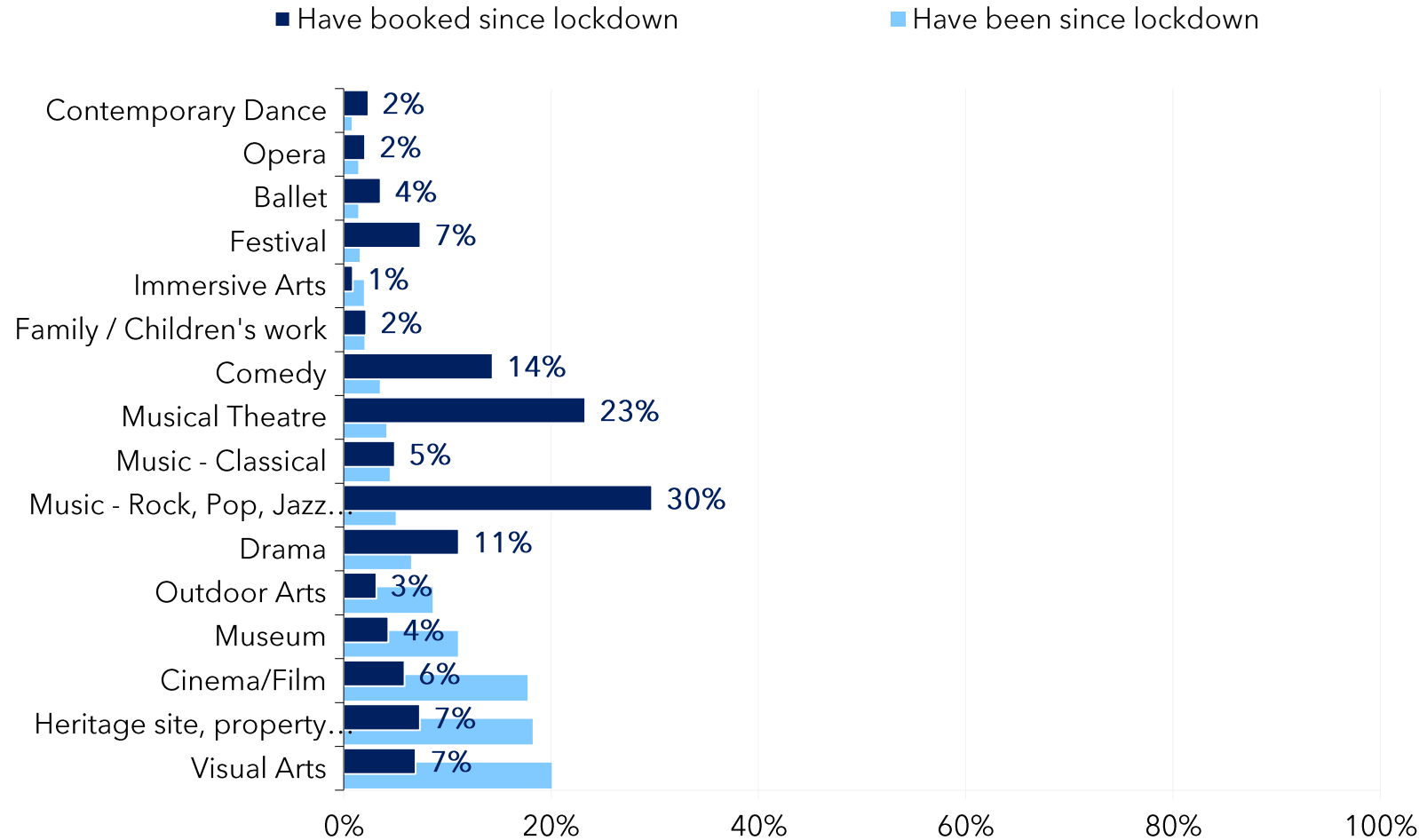


FUTURE EVENTS

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

October n = 1,561	January n = 2,312
November n = 1,904	February n = 2,712
December n = 1,797	March n = 6,961

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 n = 20,550
Have booked since lockdown n = 24,606

Bookings for future events



BOOKING AHEAD

48% OF RESPONDENTS HAVE BOOKED EVENTS
THAT THEY HAVEN'T YET ATTENDED

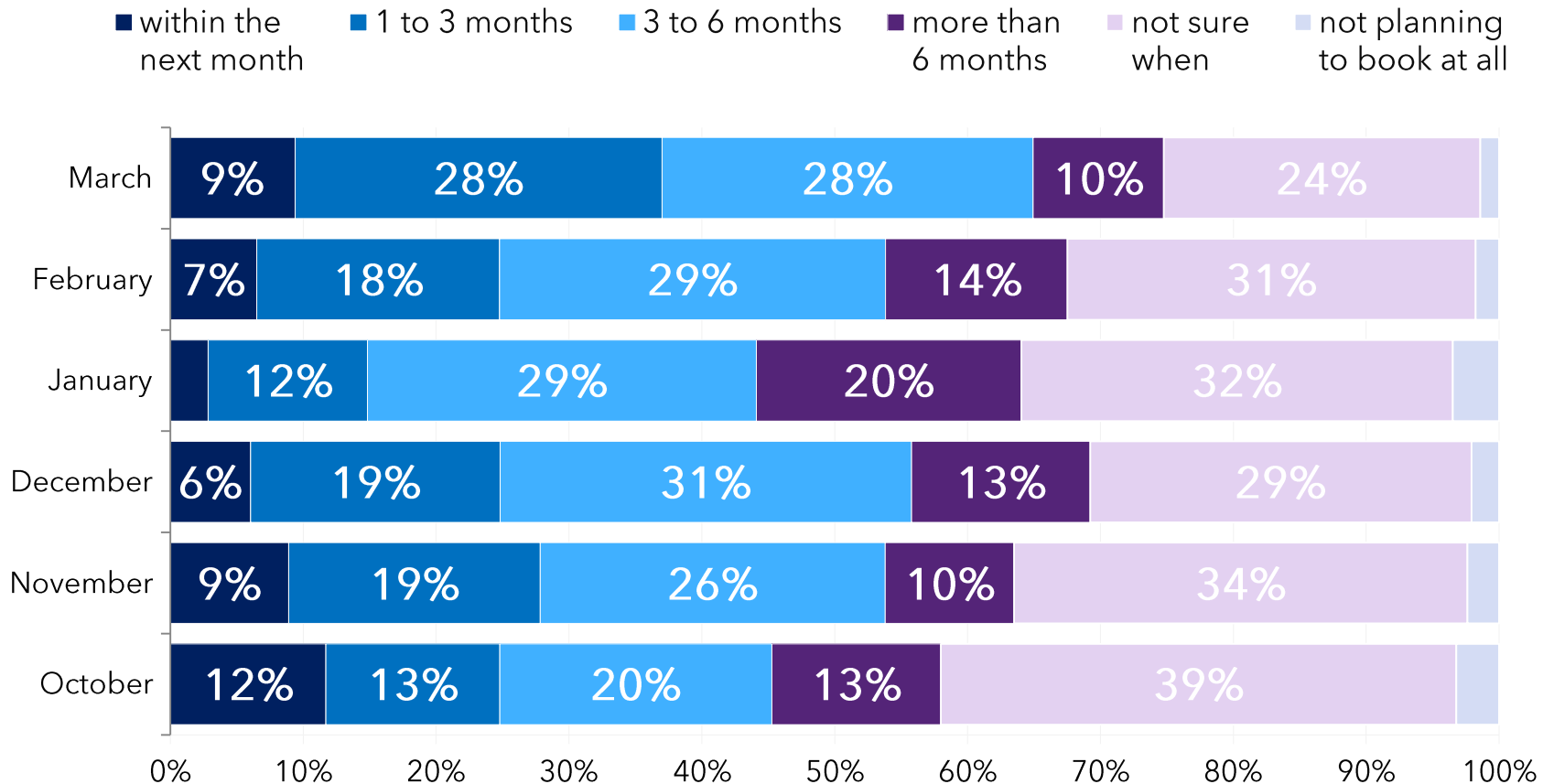


FEELGOOD EVENTS

POP/ROCK, MUSICALS AND COMEDY ARE THE
MOST POPULAR EVENTS PEOPLE ARE CURRENTLY
BOOKING FOR

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?



CULTURE RESTART

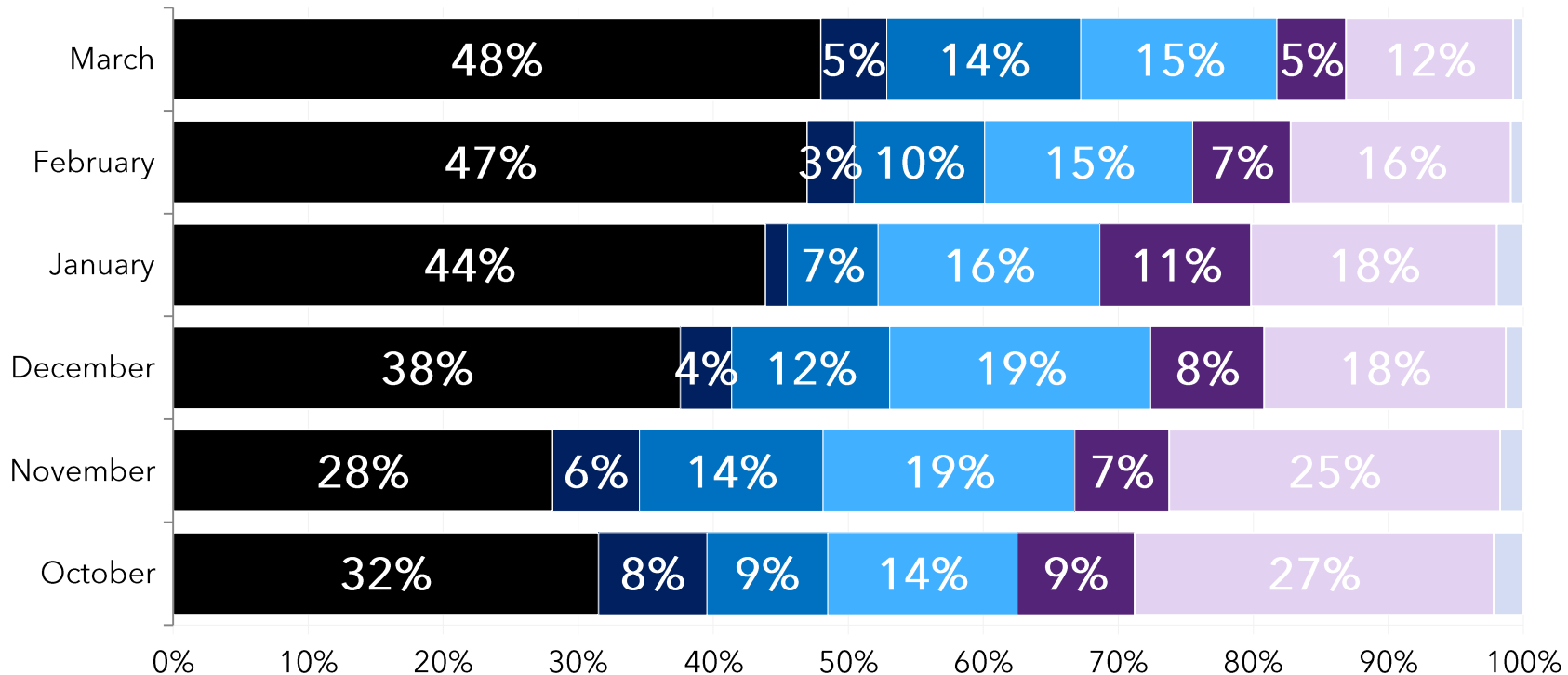
READY TO BOOK

- Those ready to book within the next 3 months reached its highest point in March
- Only 24% of respondents were unsure when they'd be ready to book


October n = 3,389 January n = 2,952
 November n = 4,950 February n = 3,056
 December n = 2,977 March n = 7,530

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?

■ have made future bookings
■ within the next month
■ 1 to 3 months
■ 3 to 6 months
■ more than 6 months
■ not sure when
■ not planning to book at all



CULTURE RESTART



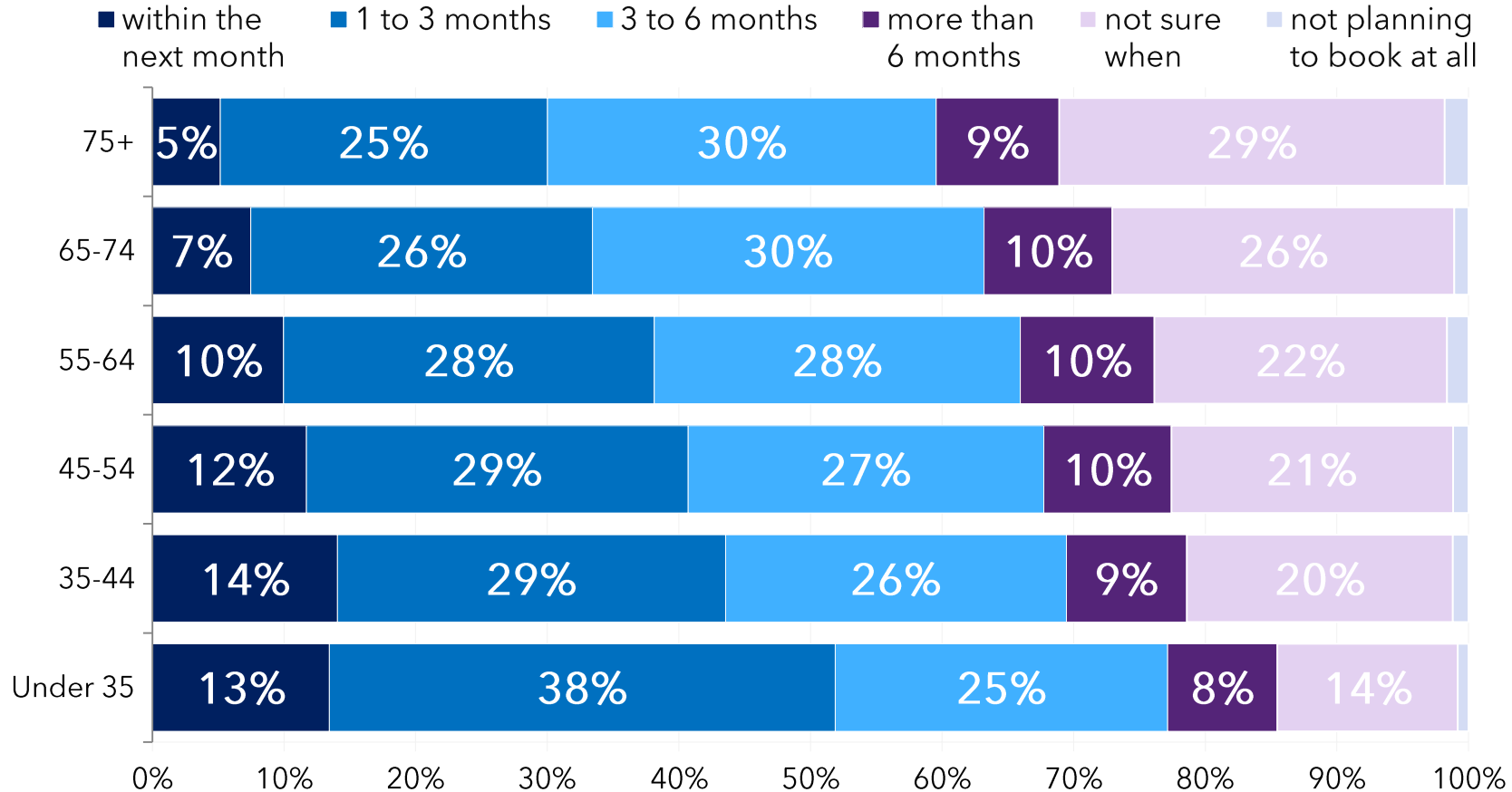
READY TO BOOK

- When those who have already made bookings are included in this picture, 19% of all attenders say they will be ready to book in the next 3 months

October n = 4,948 January n = 5,261
 November n = 6,887 February n = 5,763
 December n = 4,770 March n = 14,473

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?

MARCH RESPONDENTS



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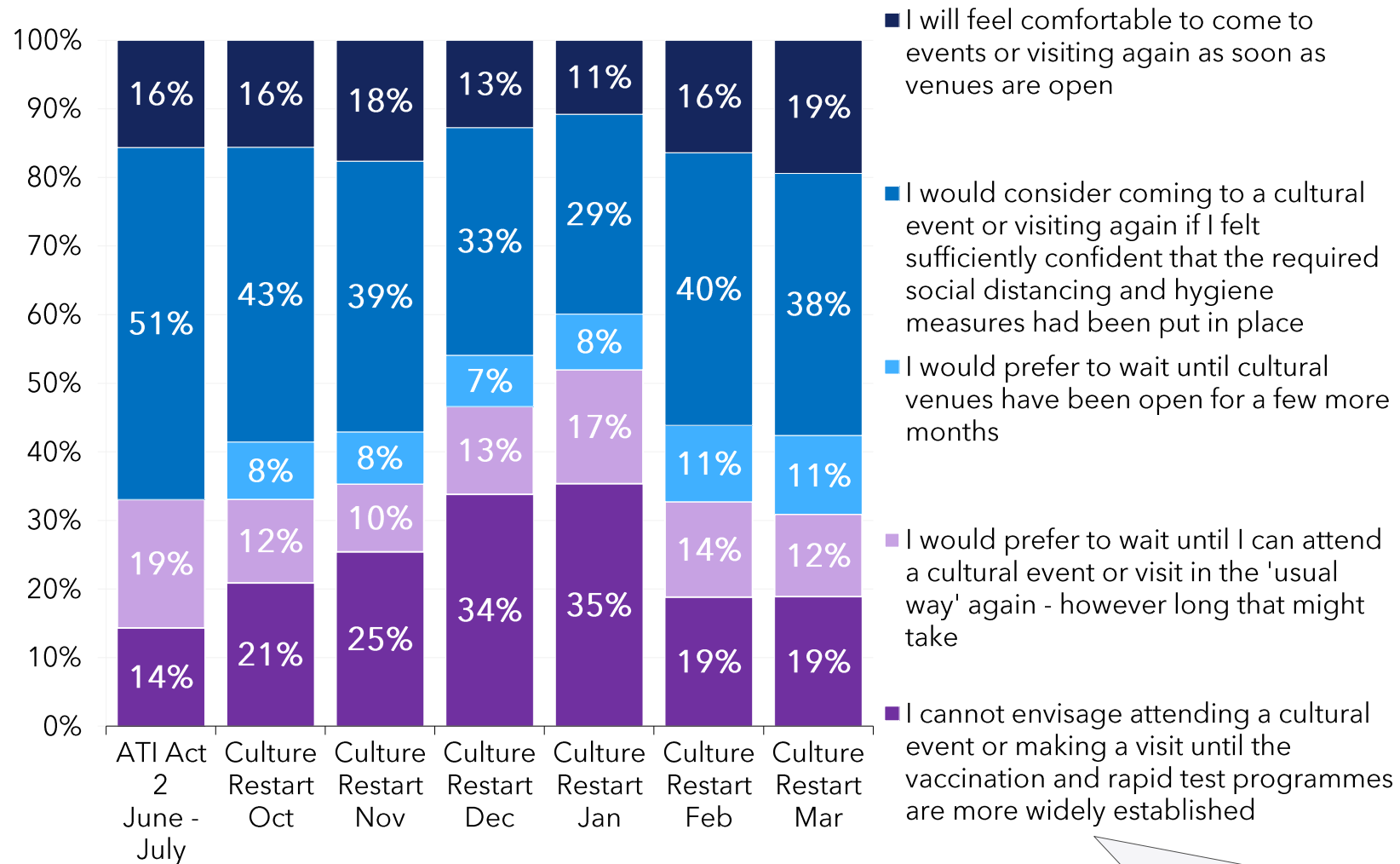
READY TO BOOK

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

March responses:

Under 35 n = 372; 34-44 n = 668;
45-54 n = 1,103; 55-64 n = 1,956;
65-74 n = 2,423; 75+n = 833

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



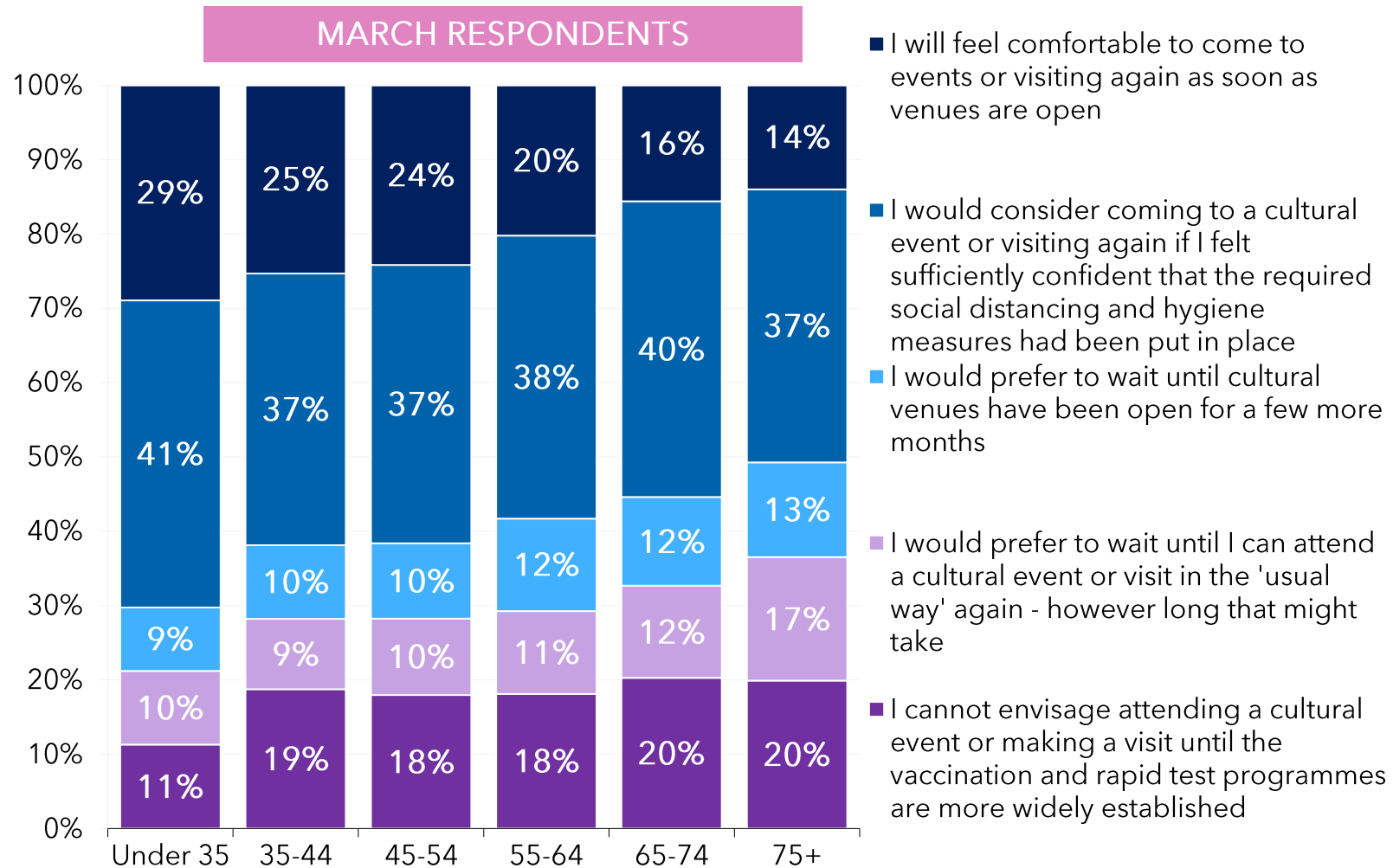
RETURNING TO EVENTS

- The proportion who are willing to attend with safety measures in place increased from Jan's low-point
- The proportion waiting for the vaccine rollout has fallen from 35% in Jan to 19%

October n = 3,358	January n = 2,927
November n = 4,904	February n = 3,042
December n = 2,949	March n = 7,465

Changed from "...until a vaccine, treatment or rapid test for Covid-19 is readily available" to "...until the vaccination and rapid test programmes are more widely established"

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



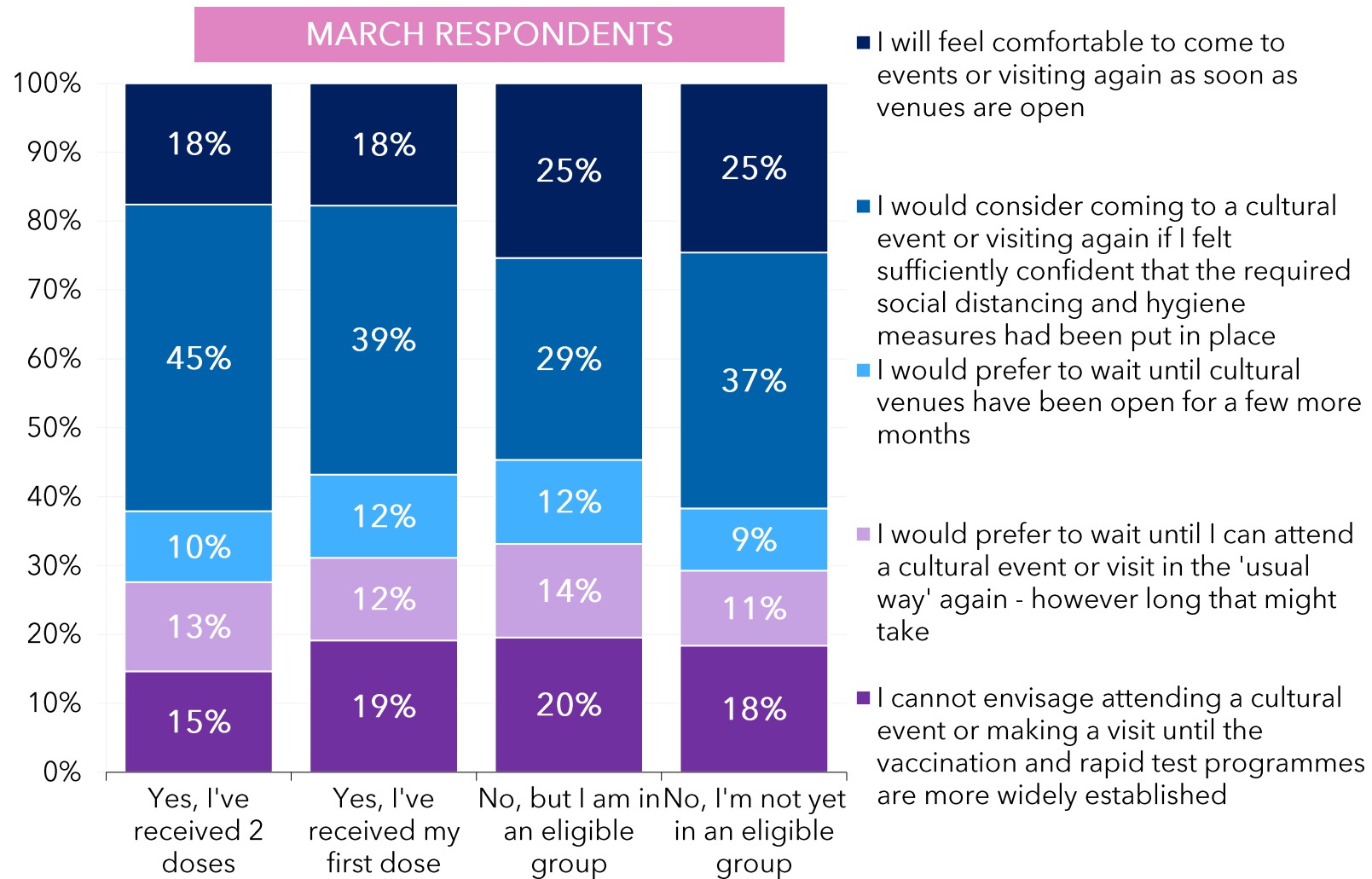
RETURNING TO EVENTS

- Younger audiences, particularly Under 35s, are more comfortable about returning
- 17% of the oldest group want to wait until they can attend in the 'usual way'

March responses:

Under 35 n = 363; 34-44 n = 656;
45-54 n = 1,097; 55-64 n = 1,938;
65-74 n = 2,412; 75+n = 830

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

- Those that have been vaccinated are still less likely to say they will return as soon as venues reopen

March responses:

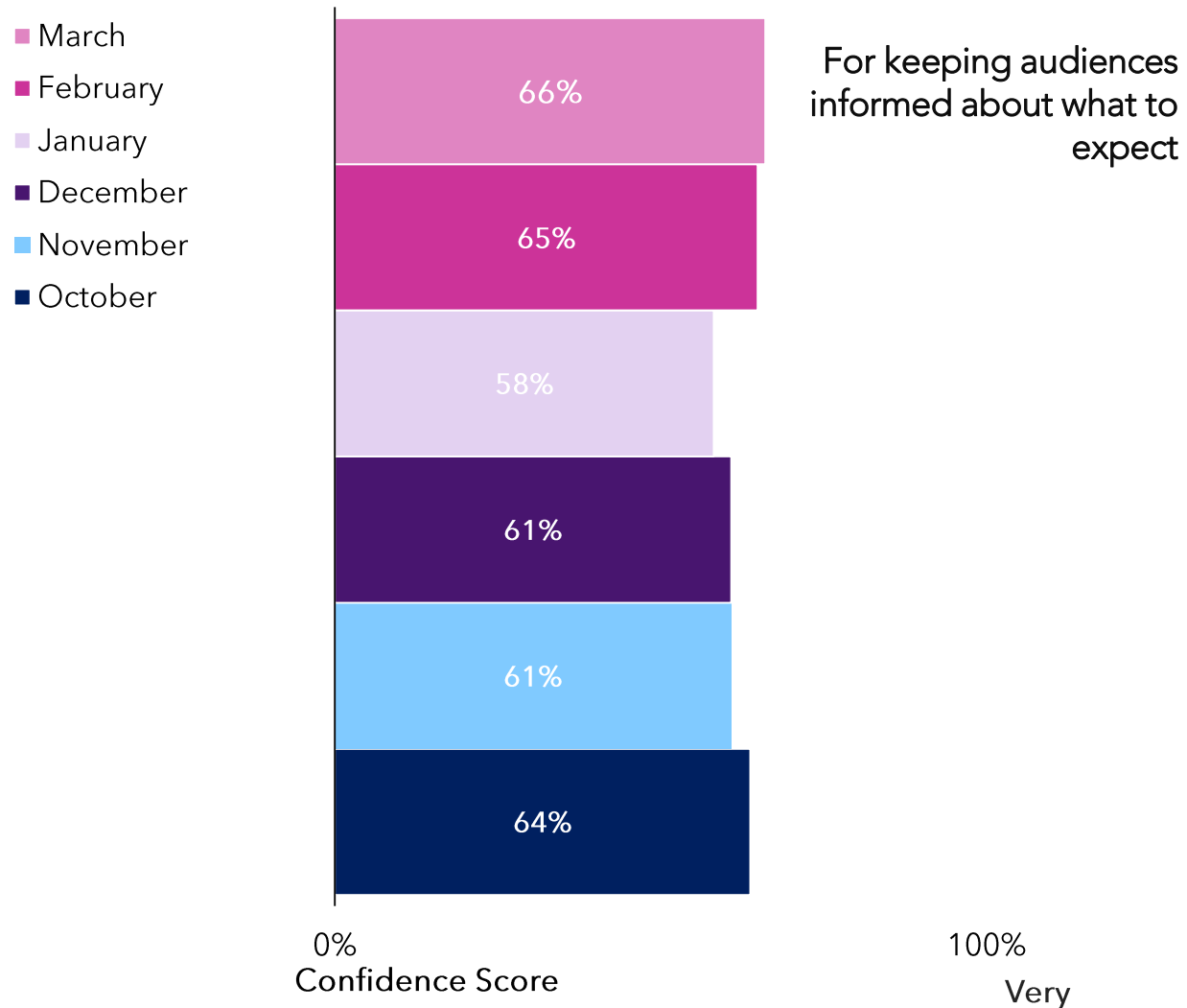
2 doses n = 303

1 dose n = 5,423

No, eligible n = 511

No, not eligible n = 1,218

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

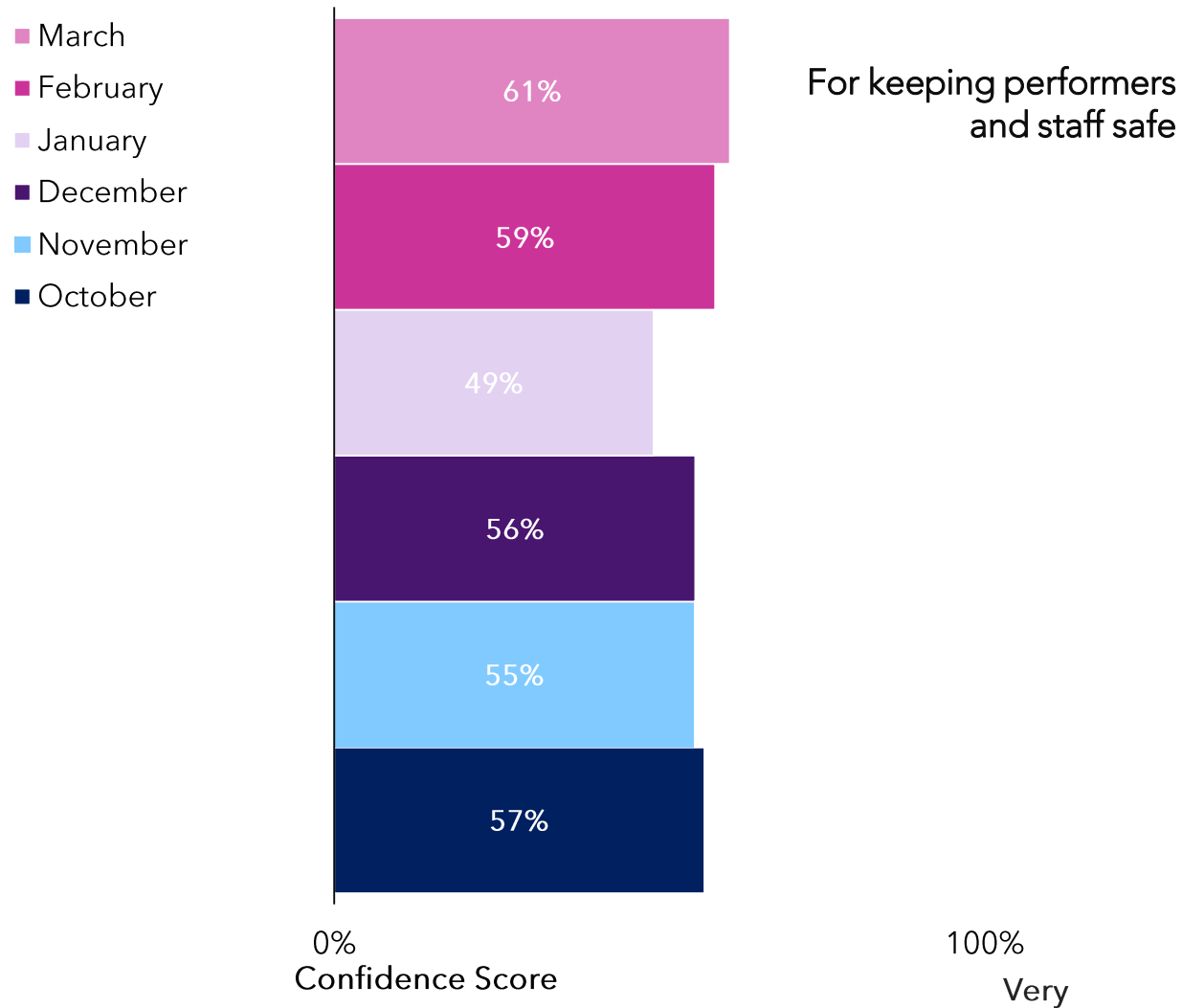


SAFETY MEASURES

- Audience confidence has increased since January's low point
- They are most confident about venues keeping them informed, and less confident that venues will keep them safe and enforce social distancing and other safety measures

October n = 4,946	January n = 5,045
November n = 6,887	February n = 5,429
December n = 4,596	March n = 13,567

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

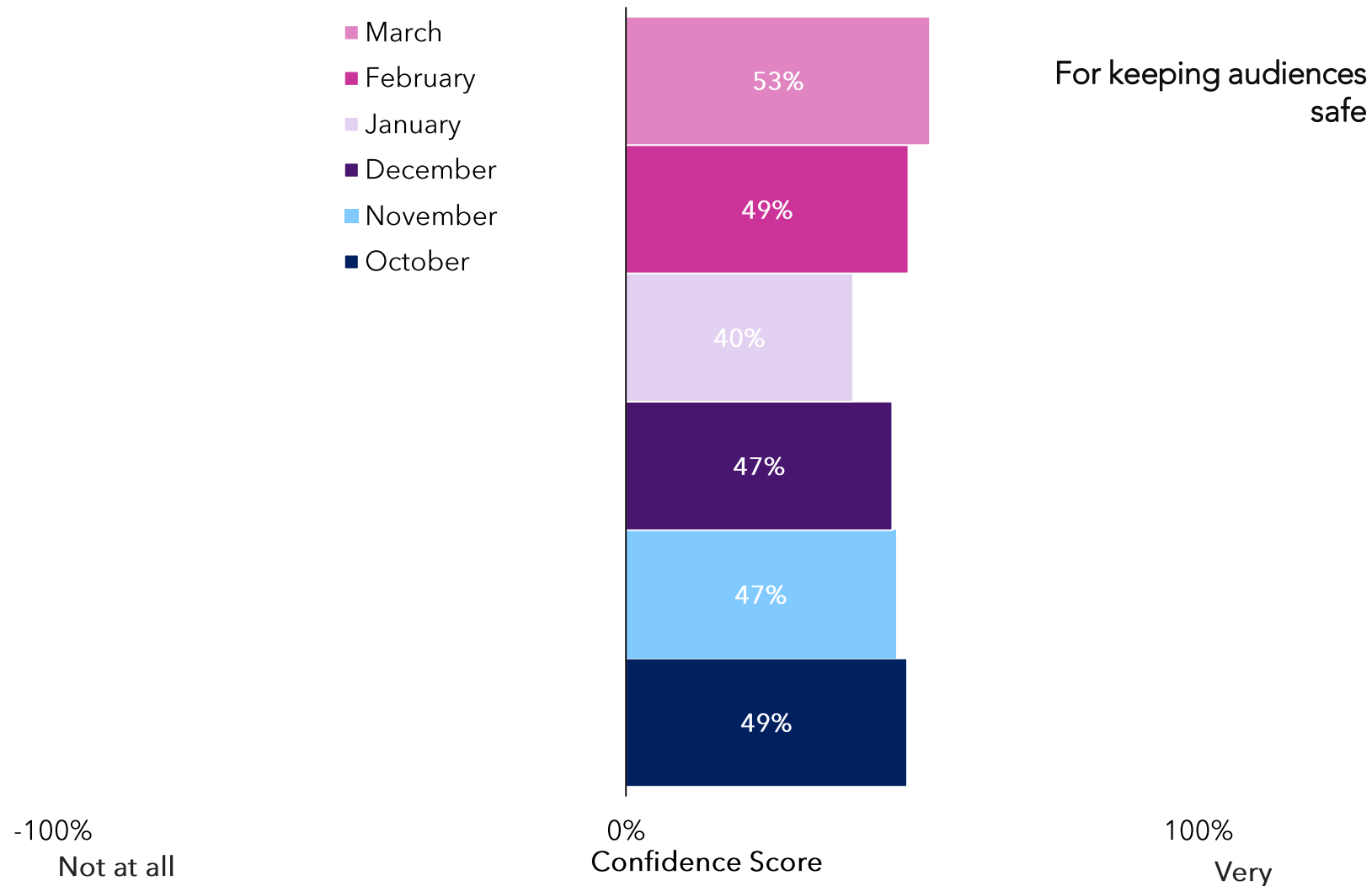


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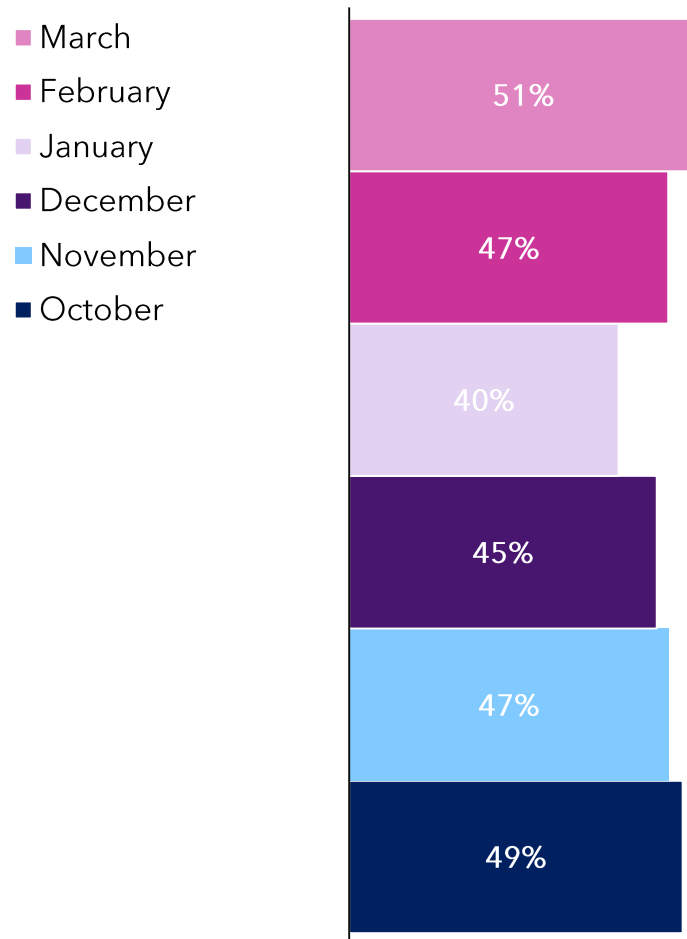


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November n = 6,887	February n = 5,429
December n = 4,596	March n = 13,567

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



For enforcing whatever social distancing and other safety restrictions have been put in place

-100%
Not at all

0%
Confidence Score

100%
Very

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SAFETY MEASURES

- Audience confidence has increased since January's low point
- They are most confident about venues keeping them informed, and less confident that venues will keep them safe and enforce social distancing and other safety measures

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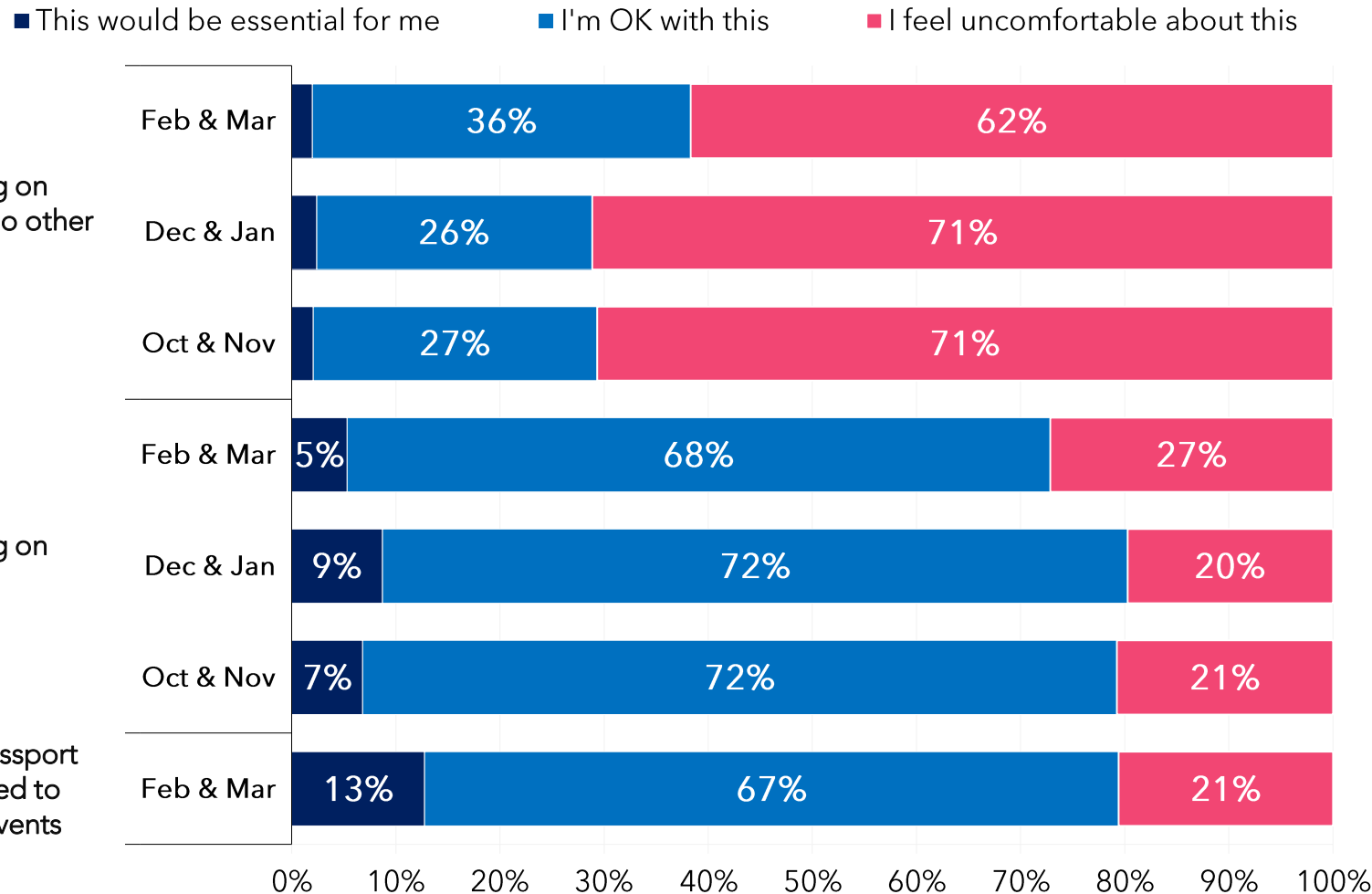
How would you feel about the following measures being considered or implemented by some cultural organisations?



SAFETY MEASURES

- A majority of respondents would feel uncomfortable about Covid testing on arrival, and no other restrictions, though this fell in Feb & March
- 21% feel uncomfortable about vaccine passports

Oct & Nov n = 11,791
Dec & Jan n = 10,006
Feb & March n = 20,239



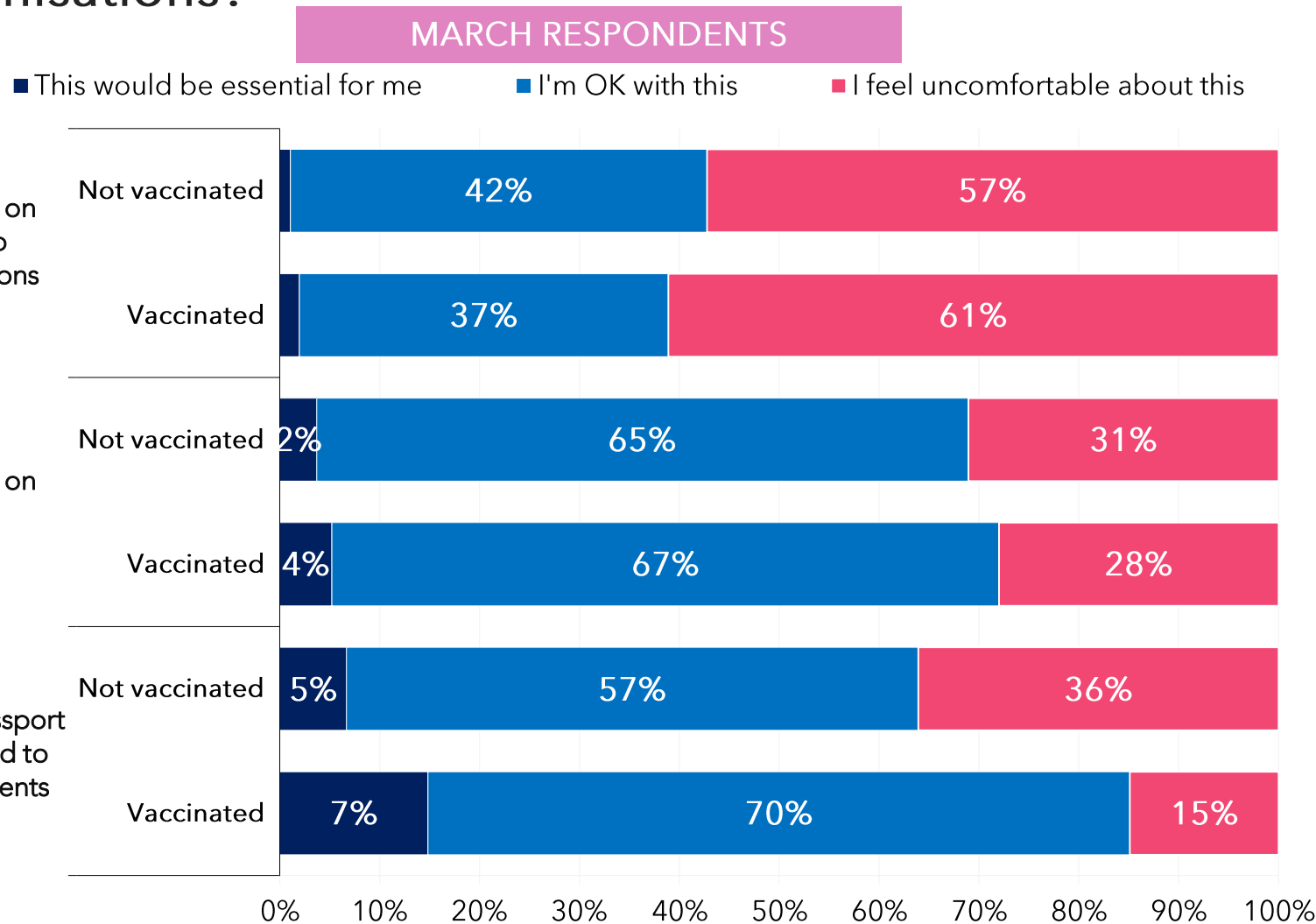
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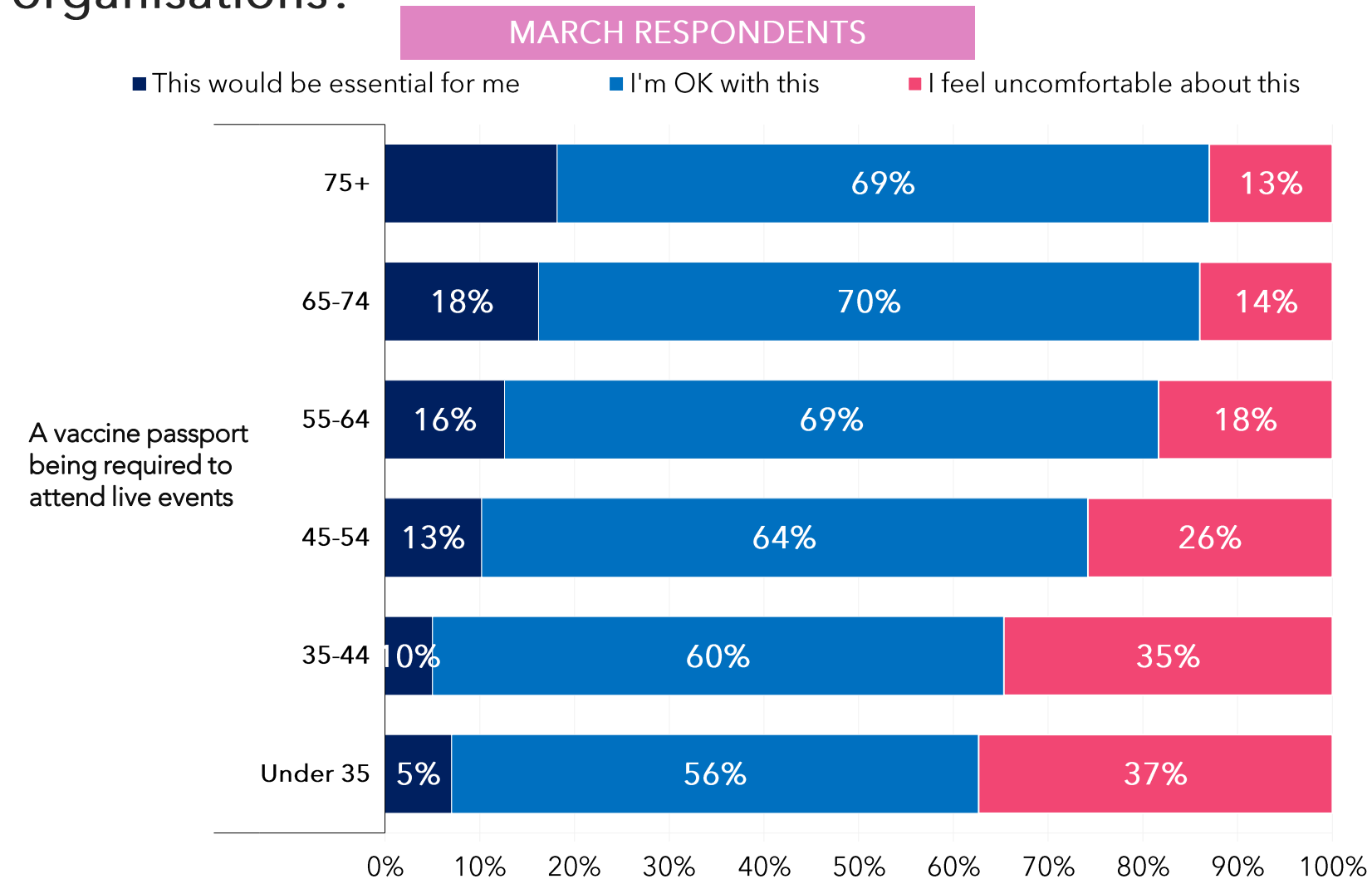
SAFETY MEASURES

- Vaccination status has no impact on how audiences feel about Covid testing, but those that have not been vaccinated do feel more uncomfortable with the idea of a vaccine passport

March responses:
Vaccinated n = 10,340
Not vaccinated n = 3,577



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



SAFETY MEASURES

- Feeling uncomfortable about vaccine passports decreases with age

March responses:
 Under 35 n = 753; 34-44 n = 1,315;
 45-54 n = 2,433; 55-64 n = 4,212;
 65-74 n = 4,174; 75+n = 1,188

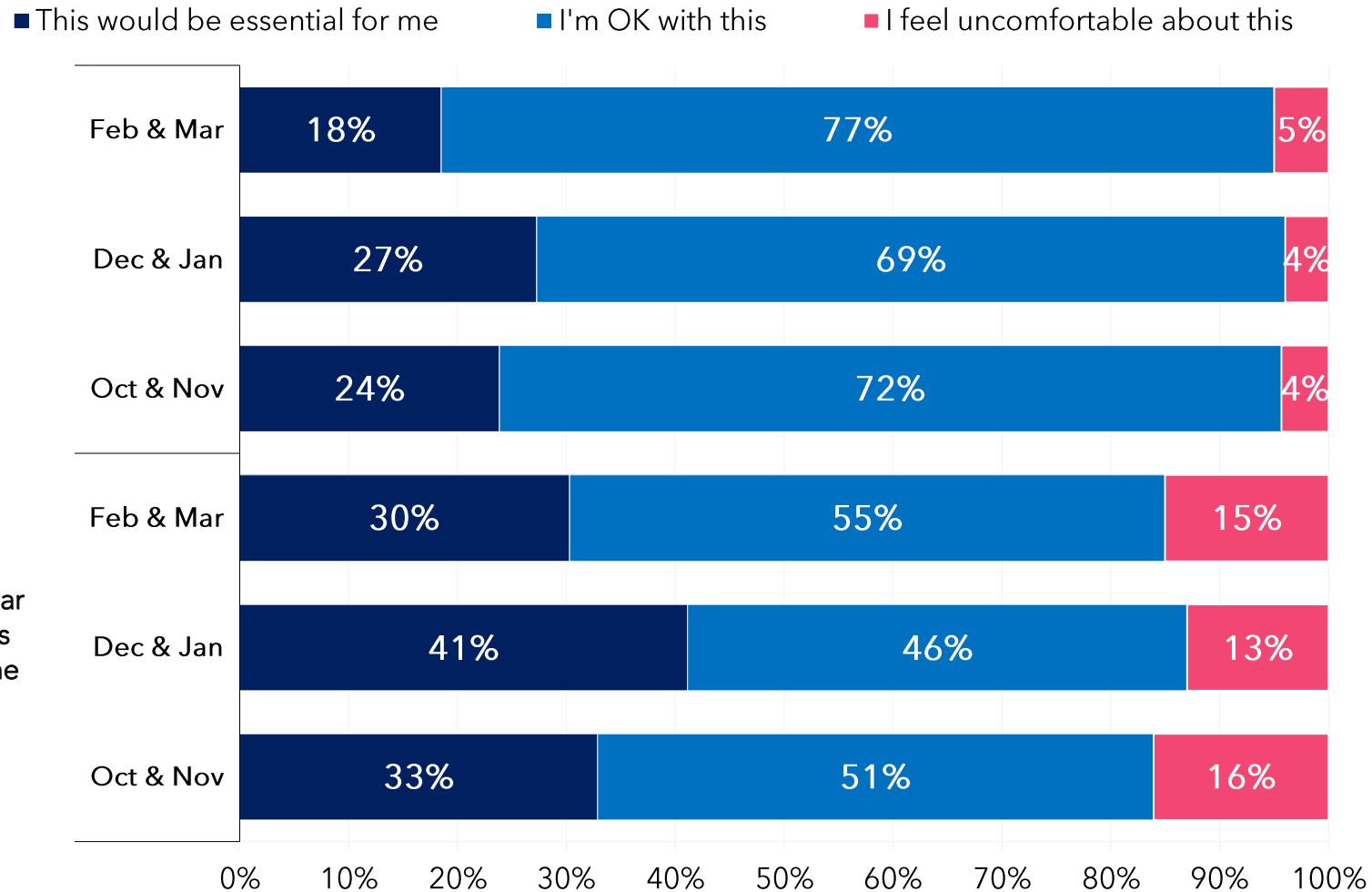
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SAFETY MEASURES

- Slight shift from Dec/Jan to Feb/March from measures being essential to respondents being OK with them

Oct & Nov n = 11,791
Dec & Jan n = 10,006
Feb & March n = 20,239



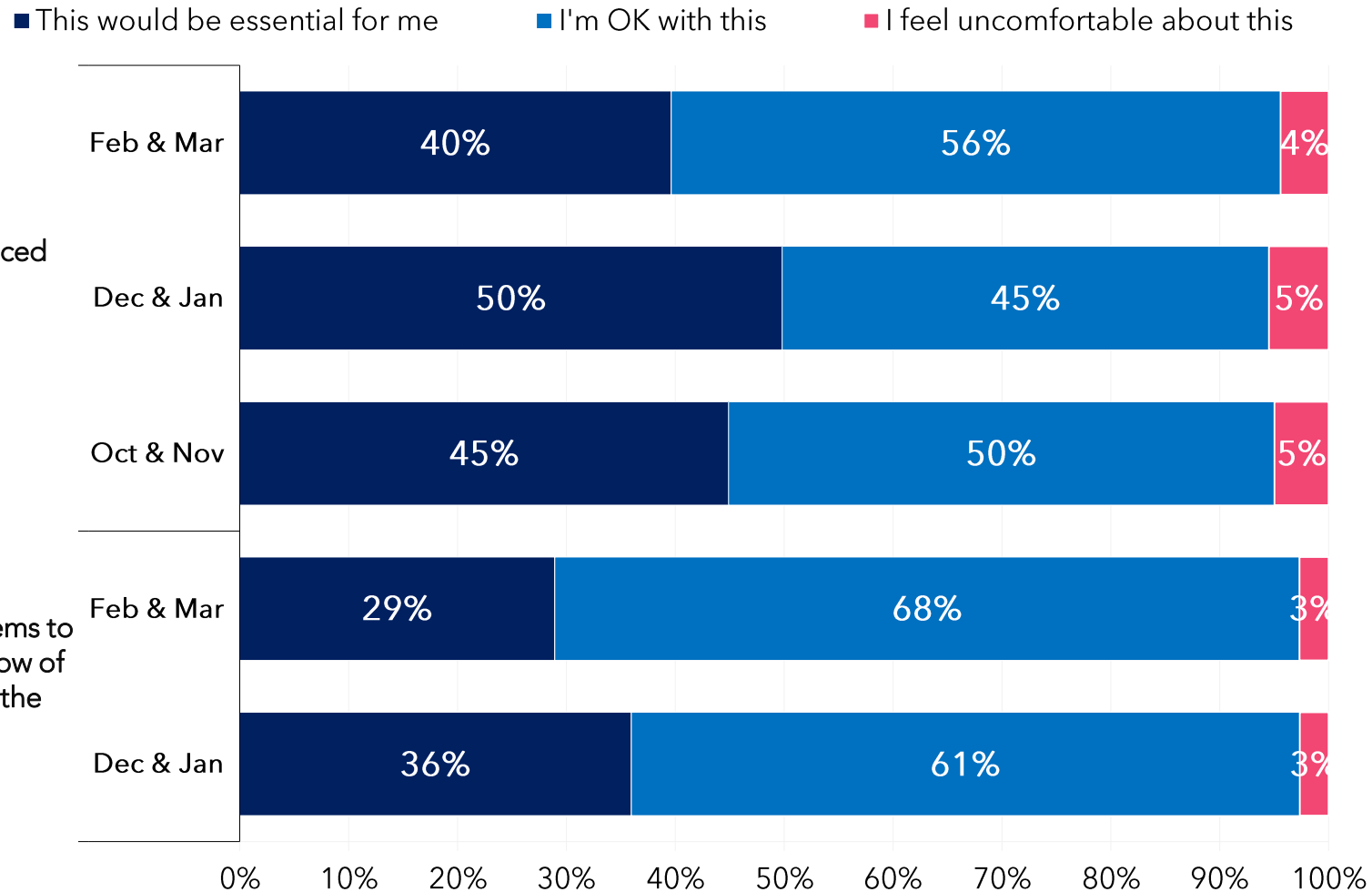
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SAFETY MEASURES

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Oct & Nov n = 11,791
Dec & Jan n = 10,006
Feb & March n = 20,239



Attitudes to attending cultural events again



READY TO BOOK

THOSE READY TO BOOK WITHIN THE NEXT 6 MONTHS GREW TO 65% IN MARCH

THOSE WAITING FOR A VACCINE FELL FROM 35% IN JAN TO 19%

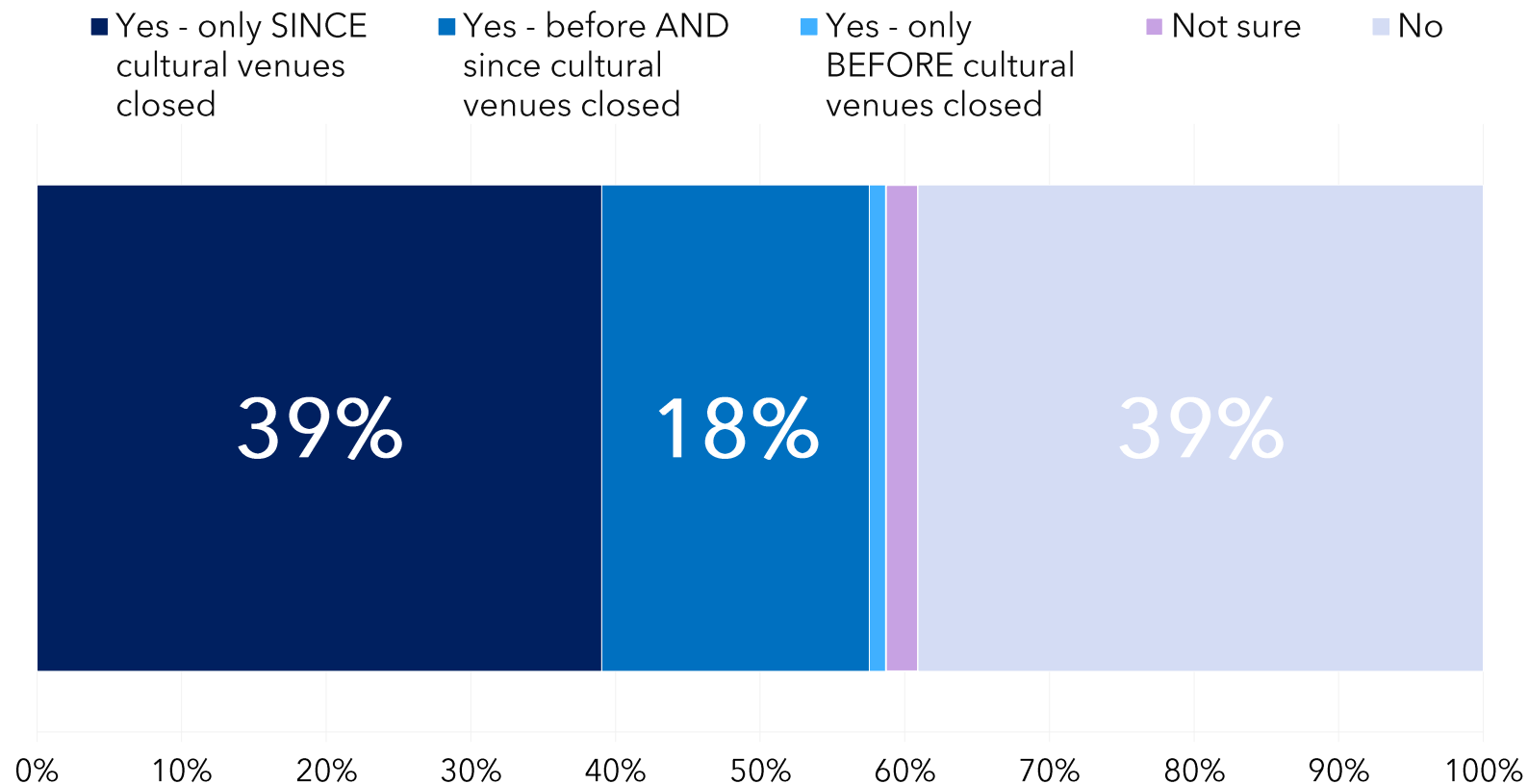


SAFETY FIRST

62% 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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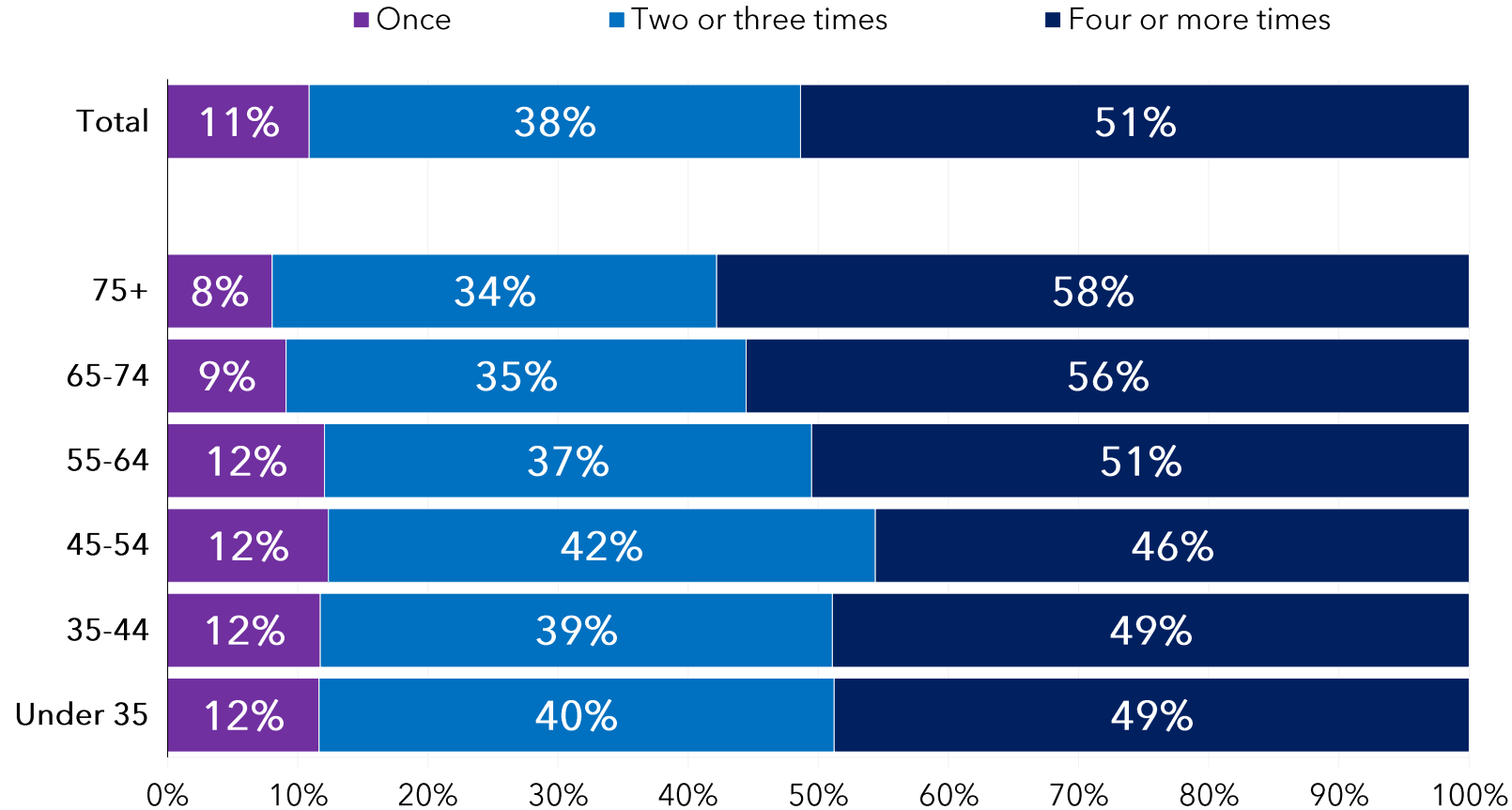


DIGITAL ENGAGEMENT

- 59% of respondents have engaged with culture online since venues closed in March 2020
- Most of which had only started engaging online since lockdown

n = 42,129

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



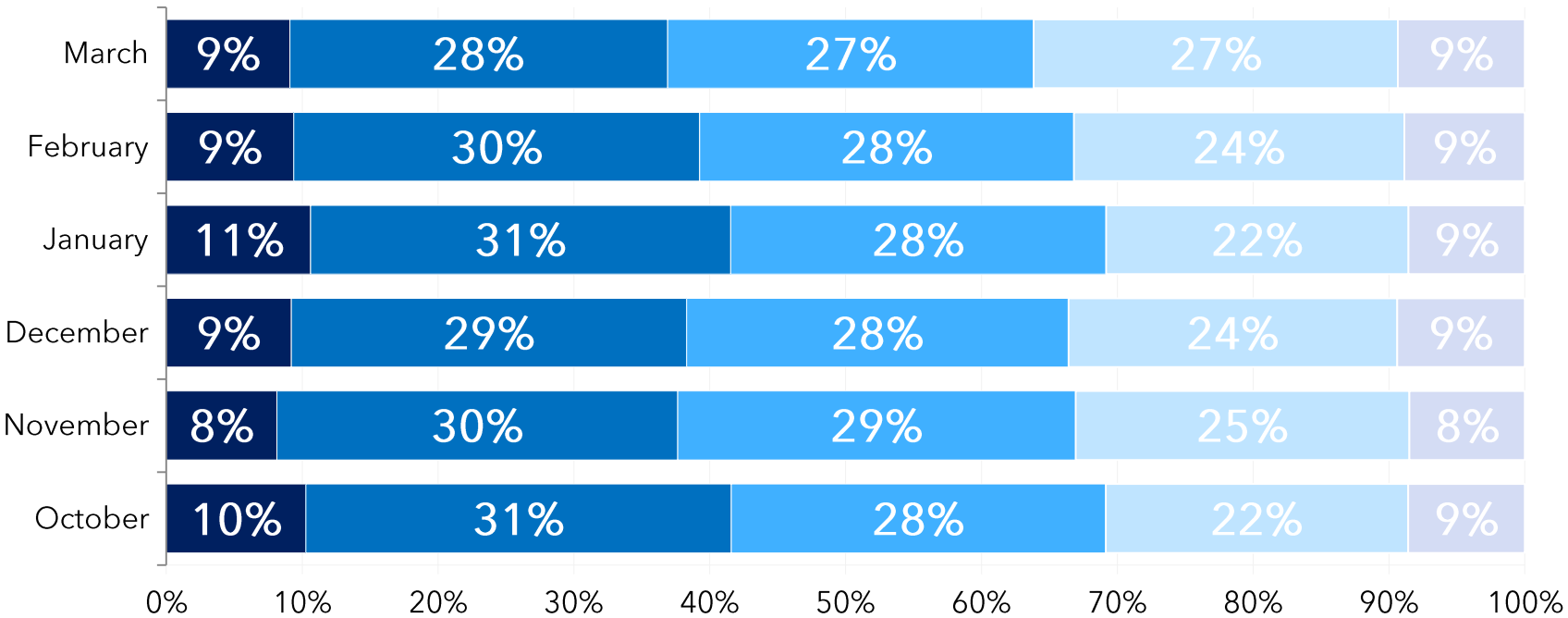
FREQUENCY OF DIGITAL ENGAGEMENT

- Of those who have engaged since venues closed, 51% have done so four or more times
- Only a minority 11% have only engaged once online
- Older age groups have engaged more frequently

n = 24,559

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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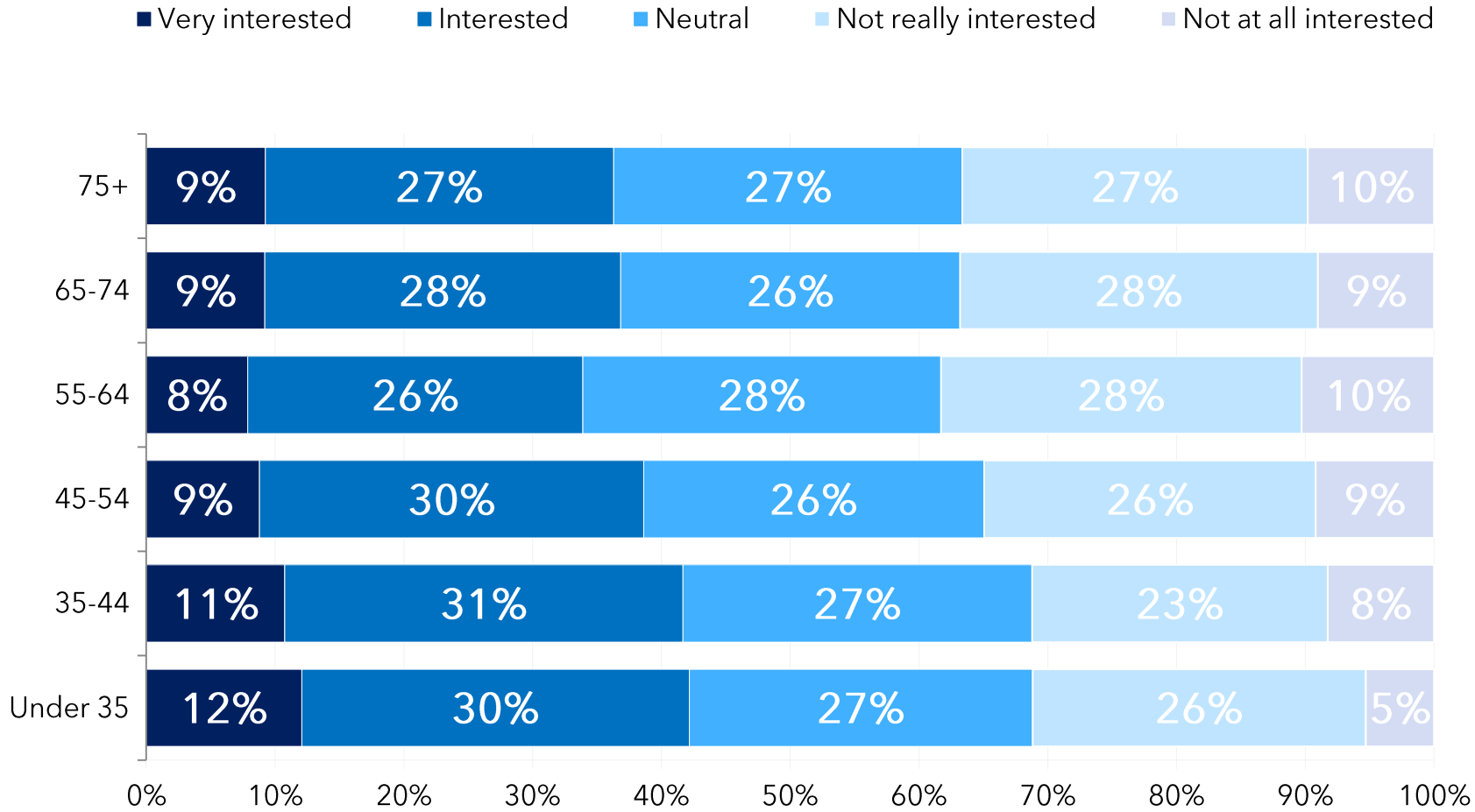


INTEREST IN DIGITAL IN FUTURE

- Those very interested or interested in engaging with culture online increased in January, but fell back in March - linked to more confidence about returning in person?

October n = 4,946 January n = 5,265
 November n = 6,887 February n = 5,771
 December n = 4,775 March n = 14,490

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

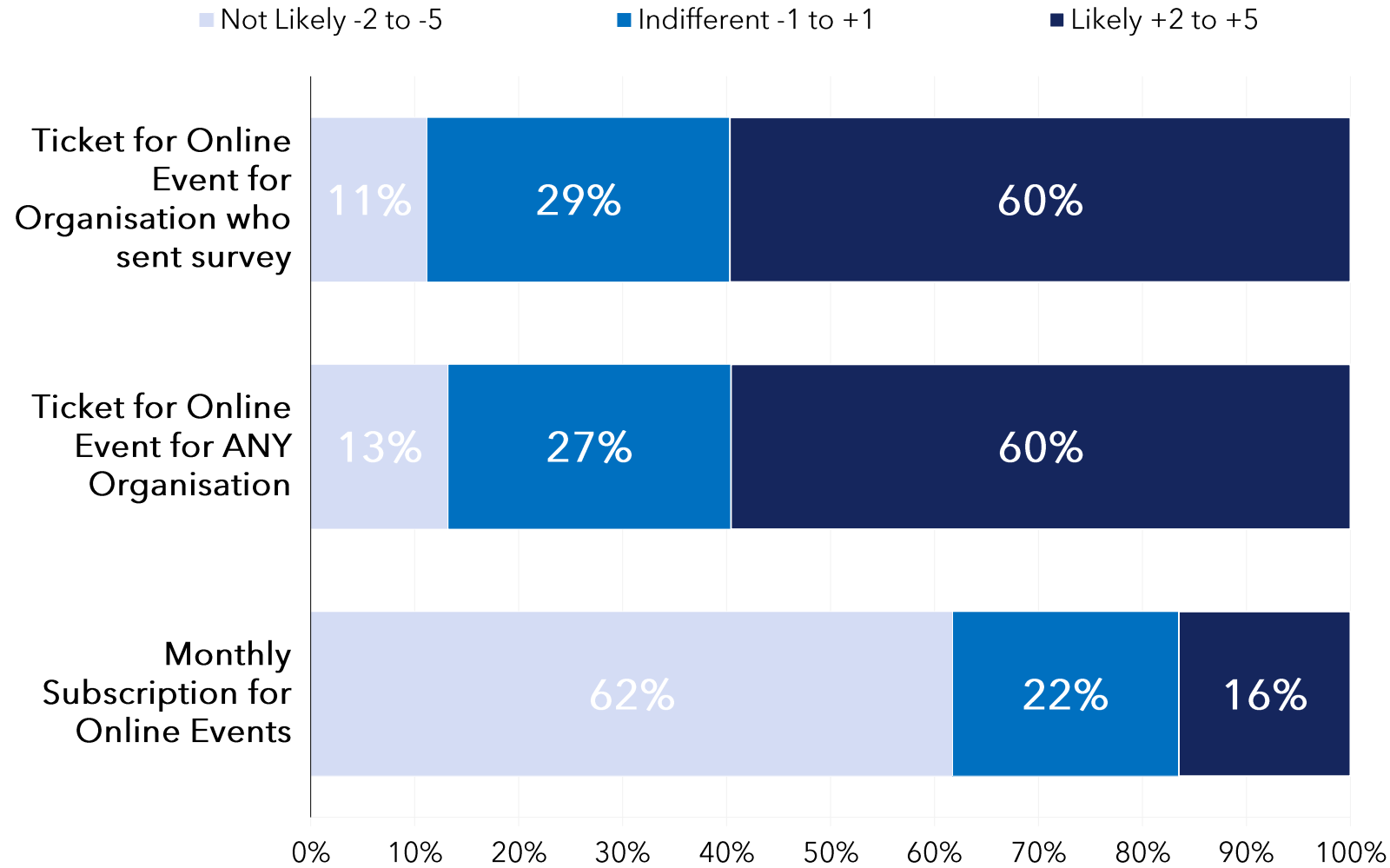
March Responses:

Under 35 n = 754; 34-44 n = 1,320;

45-54 n = 2,447; 55-64 n = 4,230;

65-74 n = 4,202; 75+n = 1,212

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



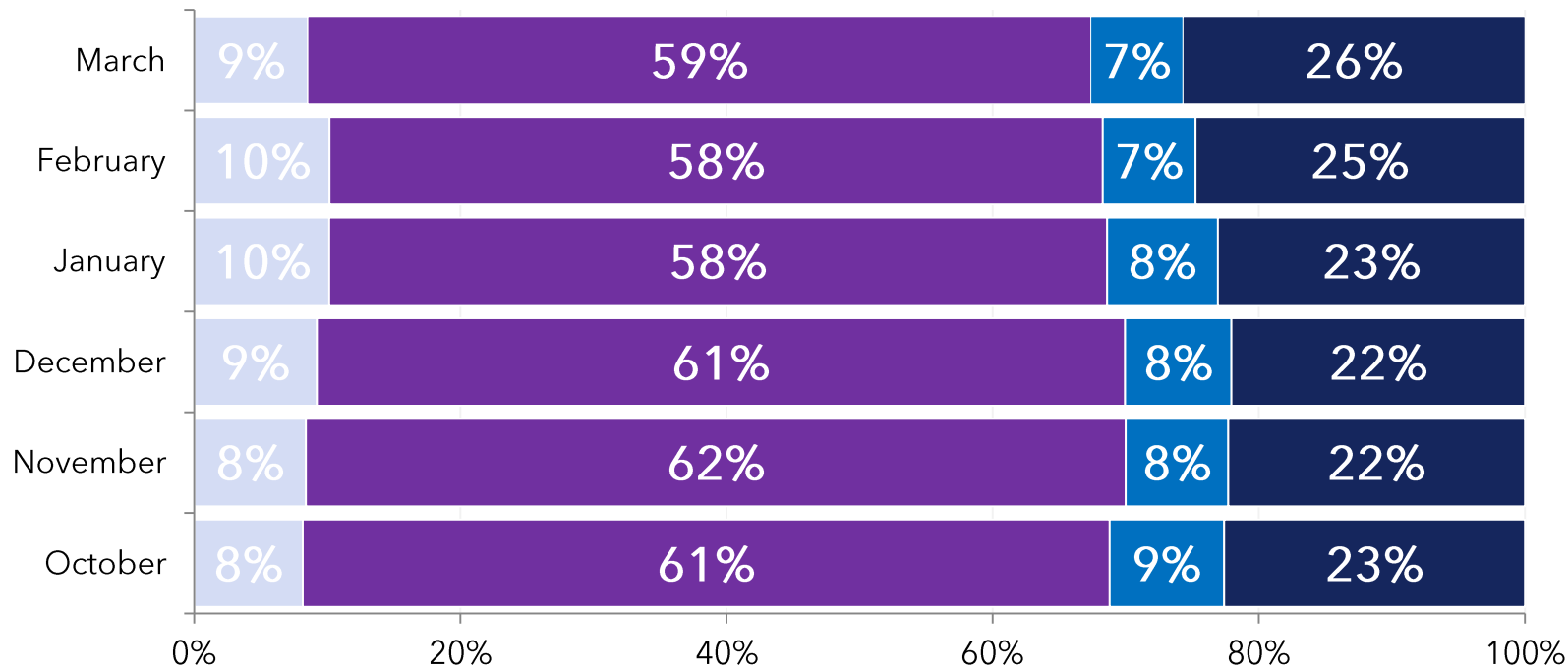
TICKETS FOR DIGITAL EVENTS

- 60% of respondents expressed interest in buying tickets for online events from the organisations they were surveyed by
- 16% of respondents would be likely to buy a monthly subscription to online events

n = 8,159; 25,200; 24,678

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



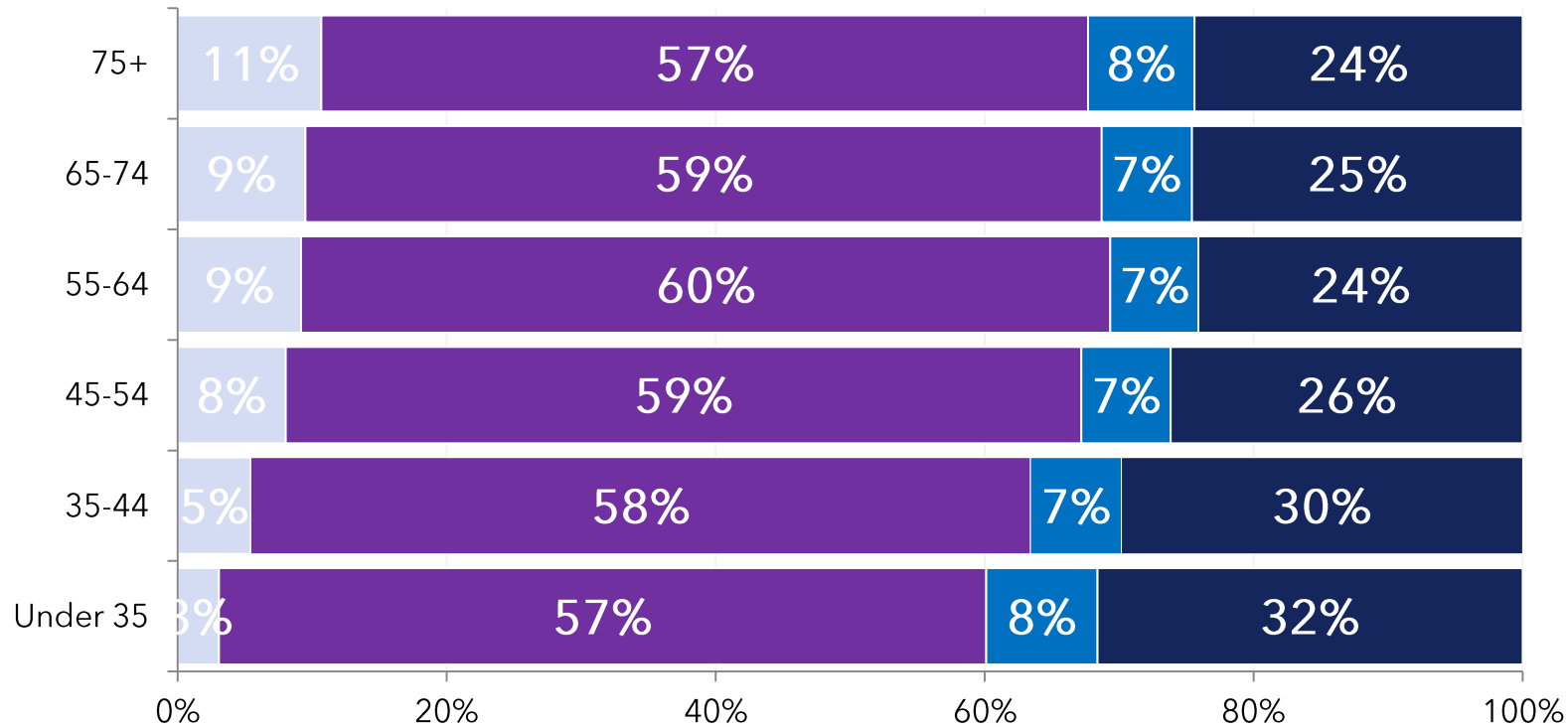
DIGITAL CULTURE VS IN PERSON ATTENDANCE

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

October n = 3,243 January n = 3,618
 November n = 4,335 February n = 3,838
 December n = 3,066 March n = 9,187

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CULTURE
RESTART



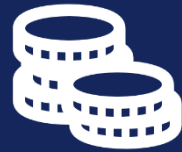
DIGITAL CULTURE VS IN PERSON ATTENDANCE

- Under 45s are more likely to engage with and pay for online events in future

March responses:

Under 35 n = 519; 34-44 n = 902;
45-54 n = 1,582; 55-64 n = 2,596;
65-74 n = 2,632; 75+n = 758

Interest in digital culture in future



DIGITAL INTEREST

THOSE INTERESTED OR VERY INTERESTED IN DIGITAL IN FUTURE FELL SLIGHTLY FROM 42% IN JANUARY TO 37% IN MARCH



DIGITAL IN FUTURE

26% OF RESPONDENTS WOULD CONTINUE TO BUY TICKETS FOR DIGITAL IN FUTURE AND 59% WOULD STILL CONSIDER IT FOR EVENTS THEY COULD NOT SEE LIVE

Are you
signed up?

A LARGER DATA SET ENABLES:

- EVER-MORE NATIONALLY REPRESENTATIVE
- GRANULAR SEGMENTATION

EVERY ORGANISATION HAS ACCESS TO ITS OWN LIVE
RESPONSES DASHBOARD

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