



CULTURE  
RESTART

**Culture Restart**  
**Latest Findings & Digital Focus webinar**

**23 February 2021**

INSIGHTS  
**ALLIANCE**

*indigo*

BAKER**RICHARDS**

**One Further**

*supporting cultural recovery*

---

# Watch on YouTube for live chat / Q&A

CULTURE  
RESTART



The screenshot shows the YouTube interface for a live stream. At the top, there is a search bar and navigation icons. The main content area features a banner with the 'CULTURE RESTART' logo and a background of colorful bokeh lights. Below the banner, the text reads 'Culture Restart audience tracker' and 'Wave 4 January 2021'. To the right, there are logos for 'INSIGHTS ALLIANCE', 'indigo', 'BAKERRICHARDS', and 'One Further', with the tagline 'supporting cultural recovery'. At the bottom left, a notification bar indicates 'Live in 66 minutes' on '23 February, 14:00' with a 'Set reminder' button. On the right side, the 'Top chat' section is visible, showing a welcome message and a chat input field with a 'Say something...' placeholder and a '0/200' character count. A 'HIDE CHAT' button is at the bottom of the chat area.

# Today's speakers



**Katy Raines**  
Partner  
*indigo*



**Chris Unitt**  
Founder  
**One Further**



**David Reece**  
Deputy CEO  
**BAKERRICHARDS**

## Audience & Visitor Tracker

Check in regularly with audiences and visitors, track sentiment and gain vital data for reopening

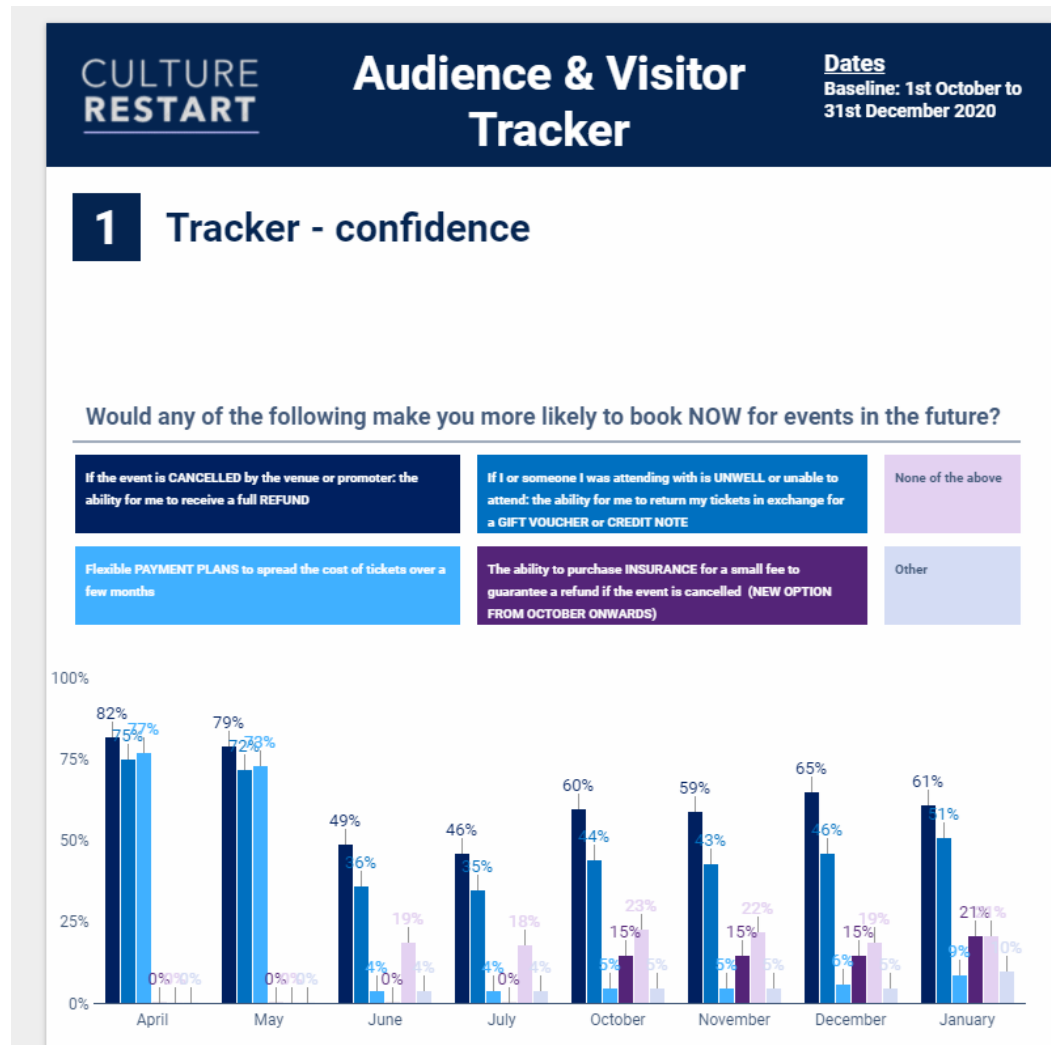
## Digital Experience Survey

Assess the impact of your digital cultural offering after a specific event or experience

## Pre and Post-Visit Experience Survey

Capture audience and visitor sentiment before and after an in-person cultural experience

# Interactive dashboard: Audience & Visitor Tracker



One Further have created an **interactive dashboard**. You can now filter the results by criteria including age, frequency, region and vulnerability to Covid.

# Audience & Visitor Tracker

## Survey Overview



SURVEY DATES

**OCT 2020 - JAN 2021**



RESPONSES

**21,873** JAN: 5,265



PARTICIPATING ORGANISATIONS

**50**



# Respondent profile



## AGE

**35% OVER 65**

**16% UNDER 45**



## LOCATION

**98% FROM OUTSIDE  
LONDON**



## FINANCES

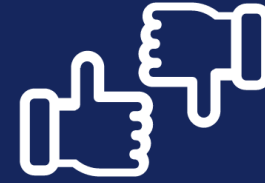
**20% HAVE LOST INCOME**



## VULNERABLE

**28% CLASSED AS  
VULNERABLE**

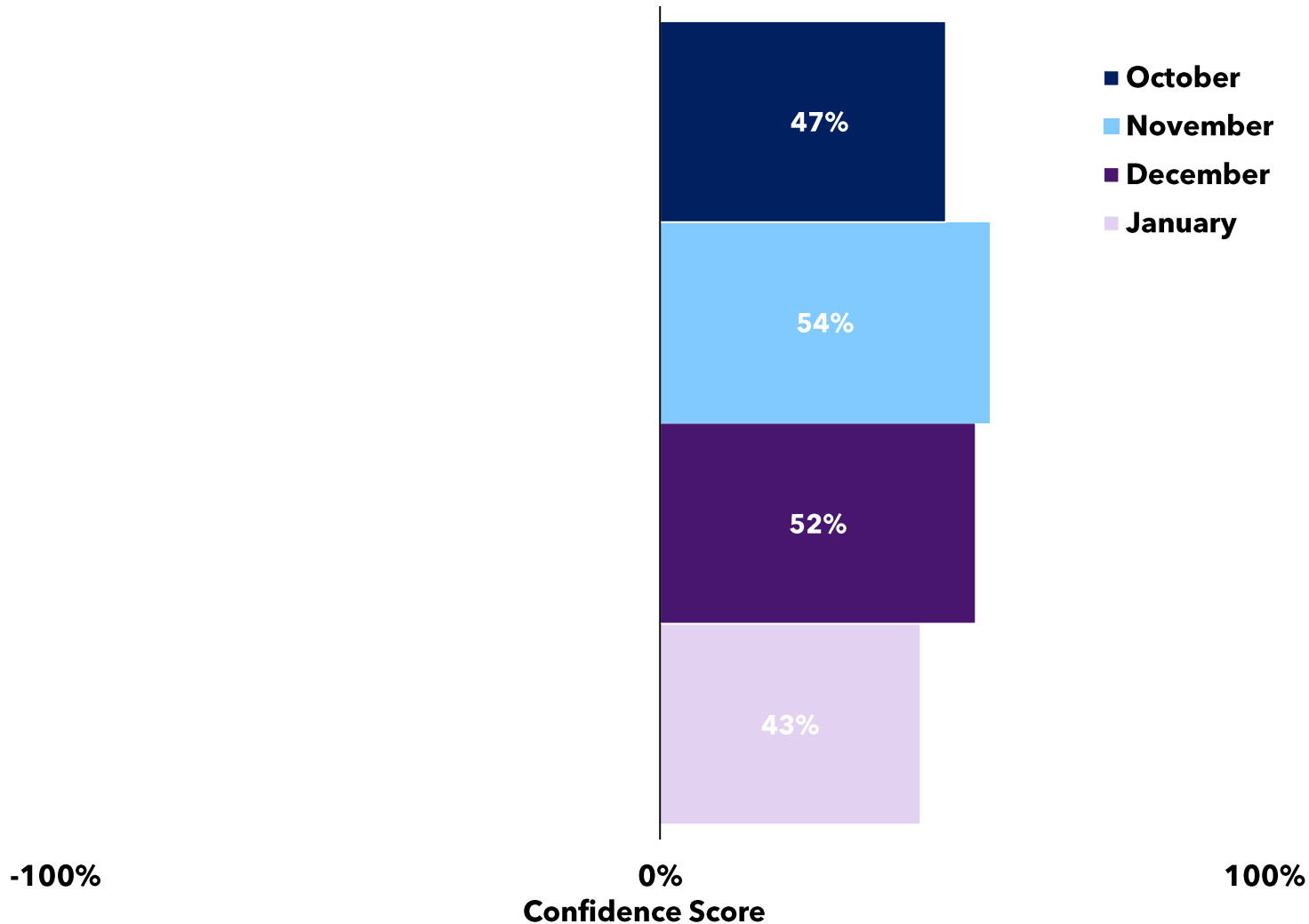
Latest  
Findings  
**JAN 2021**



Audience  
confidence levels



# Having attended, how confident do you feel about attending cultural experiences in the future?



CULTURE  
RESTART



## CONFIDENCE

- For those who have attended, net confidence score is currently at its lowest point, at +43%
- Under 35s 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

Latest  
Findings  
**JAN 2021**



Safety measures for  
in-person cultural  
experiences

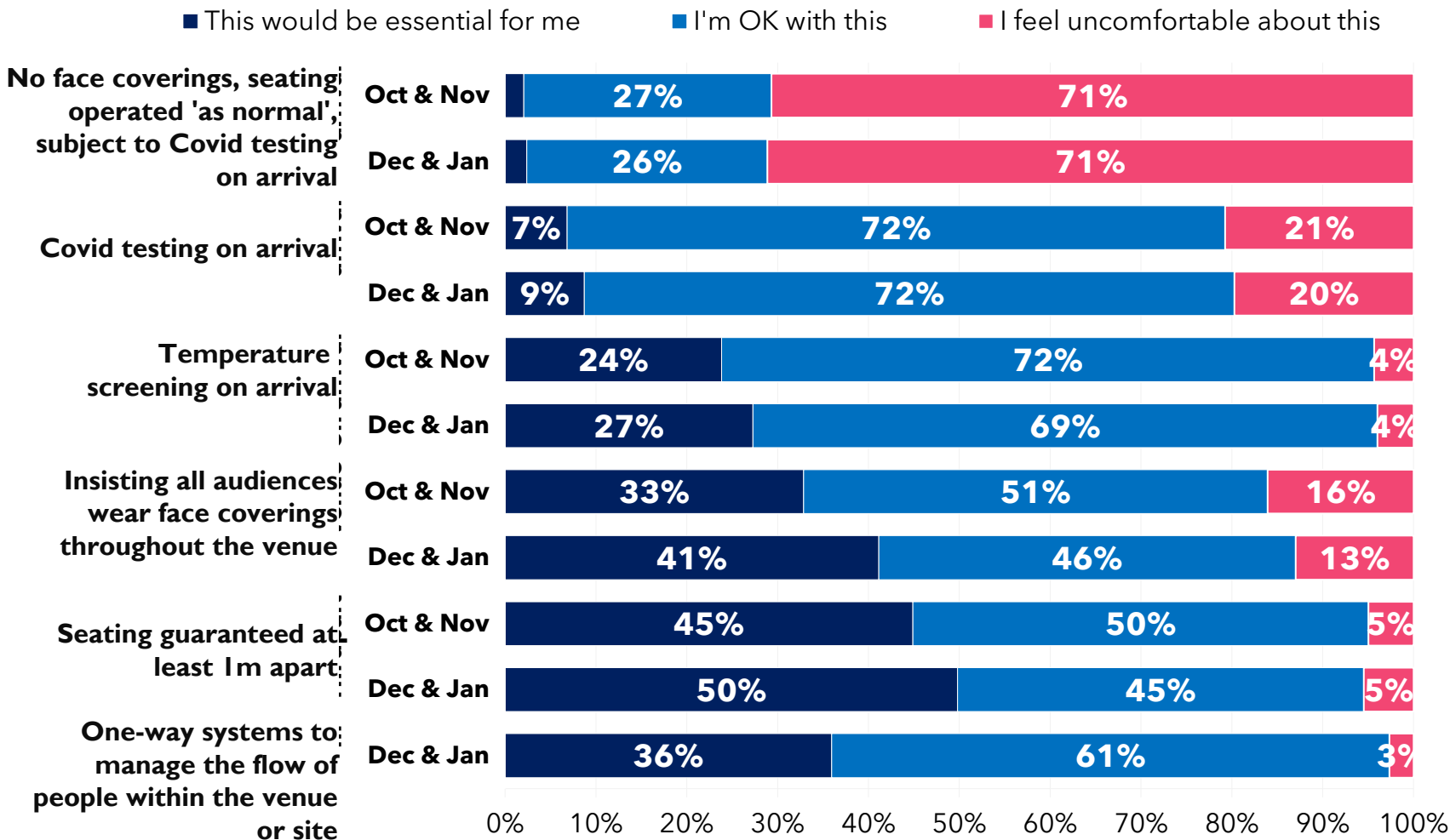
# How would you feel about the following measures being considered or implemented by some cultural organisations?



## SAFETY MEASURES

- A consistent majority of respondents 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

n = 4,930



Latest  
Findings  
**JAN 2021**



Uncertainty about  
future bookings

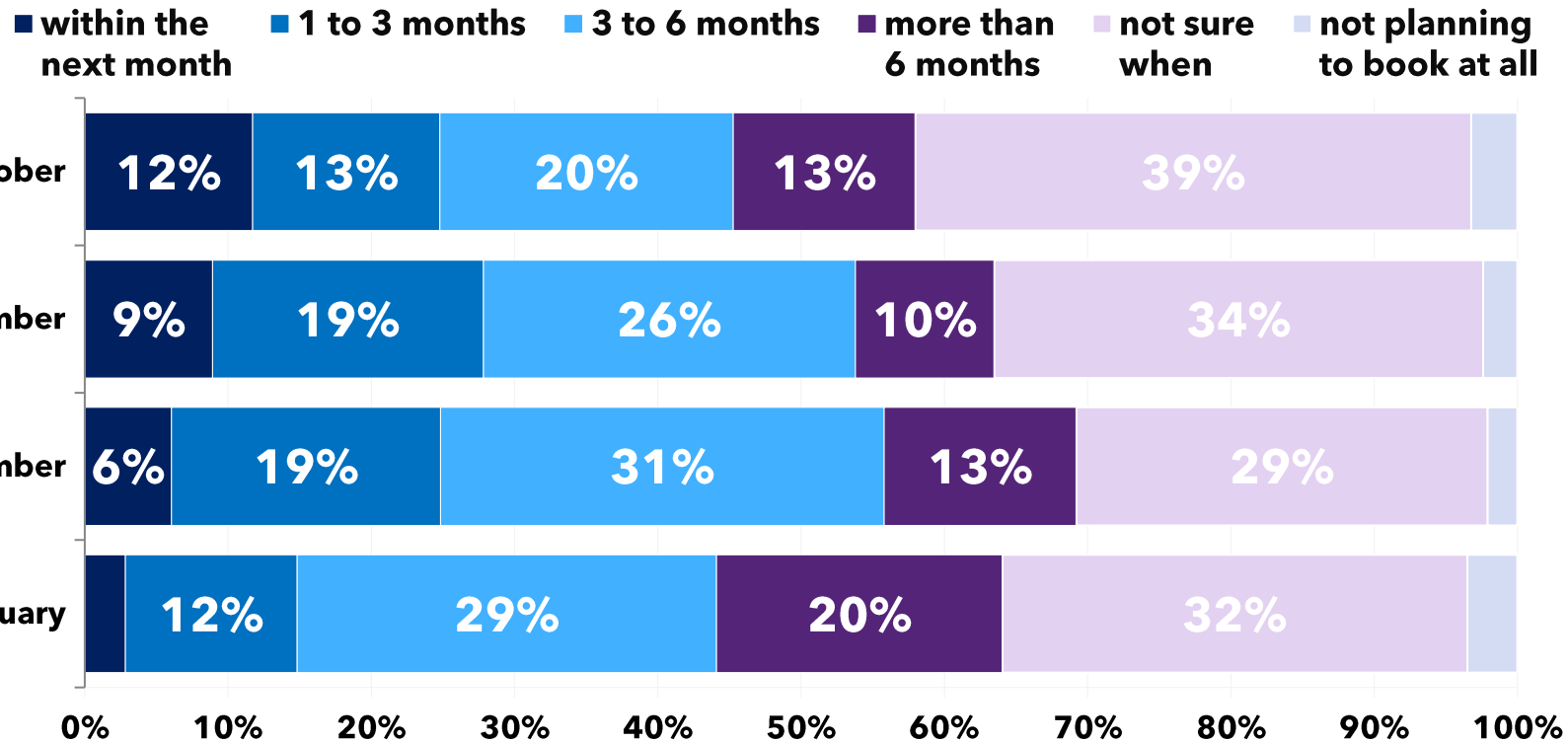
# If you had to say now when you think you'll be ready to start **BOOKING** for events again, which of the options below would you choose?



## 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

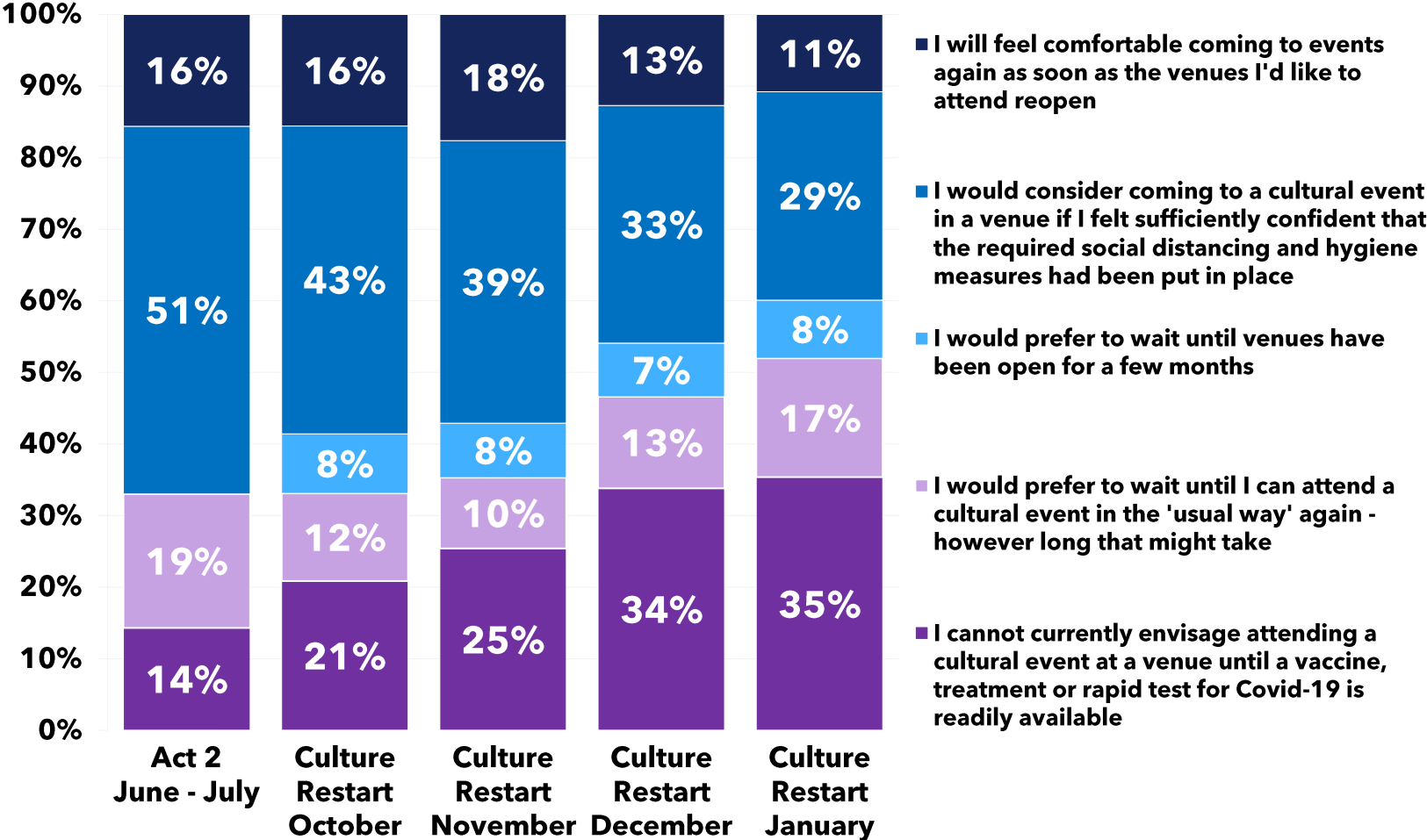


Latest  
Findings  
**JAN 2021**



Waiting for the  
vaccine or a return to  
'normal'

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



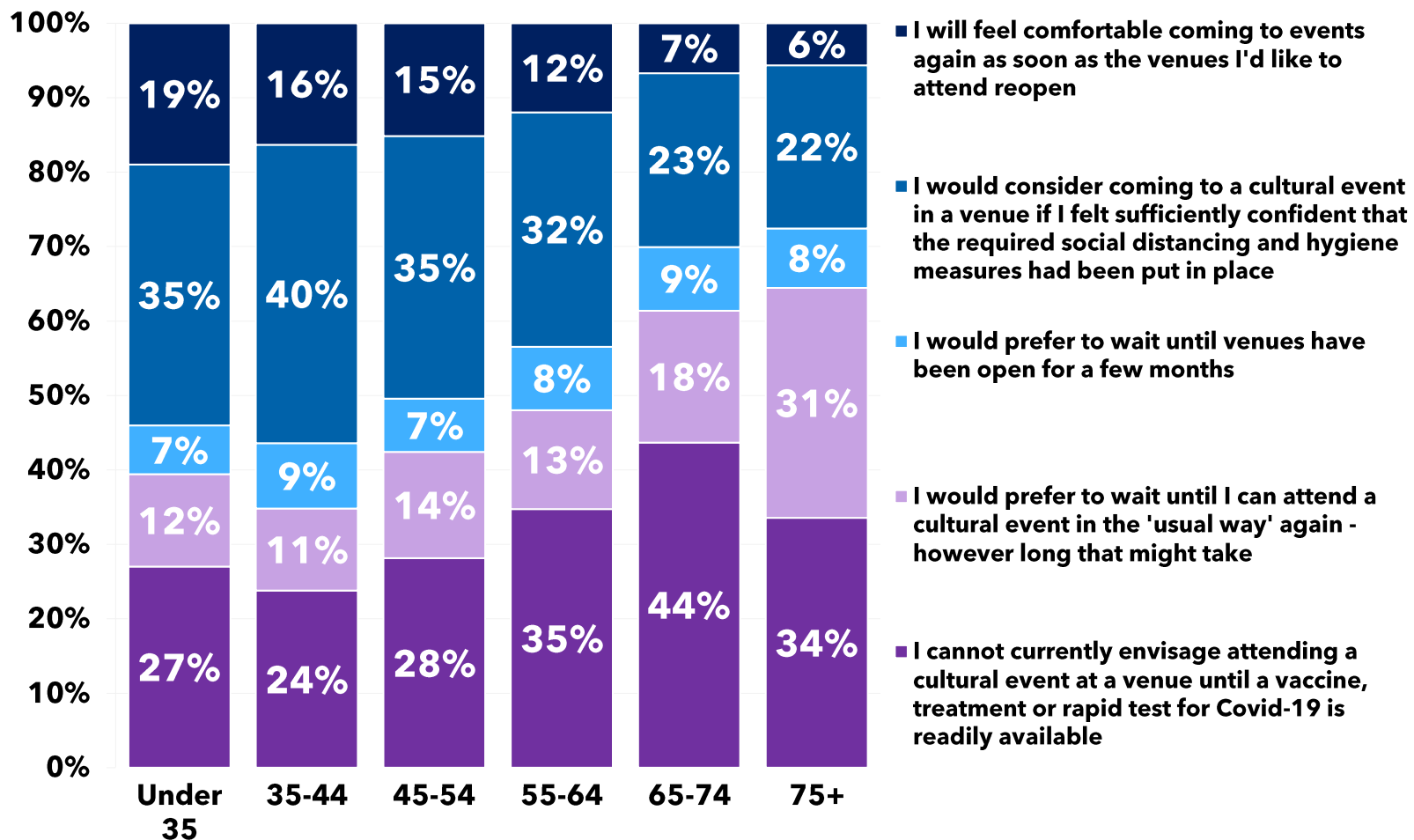
## RETURNING TO EVENTS

- 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'

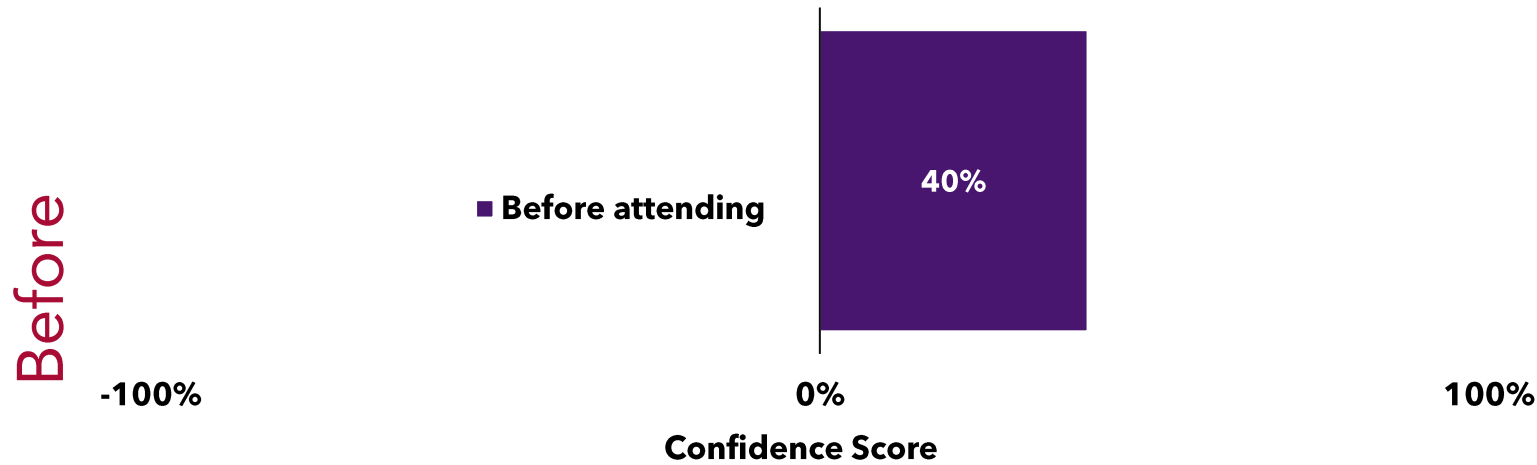
Jan responses:

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

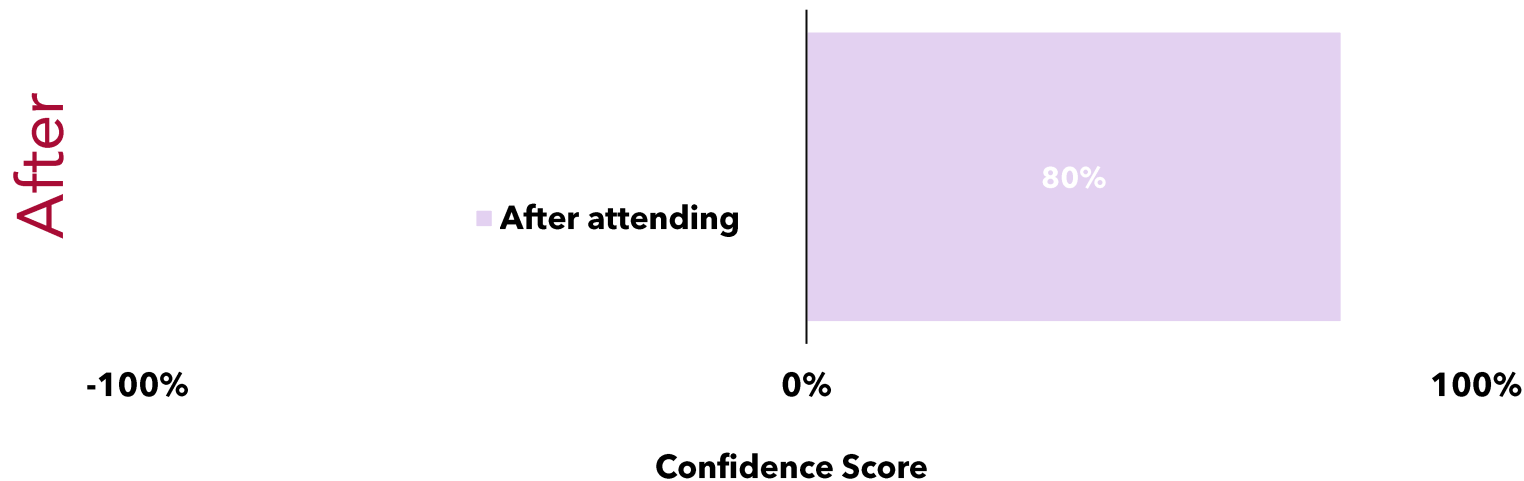
45-54 n = 476; 55-64 n = 812;

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

# How are you feeling about your forthcoming visit?



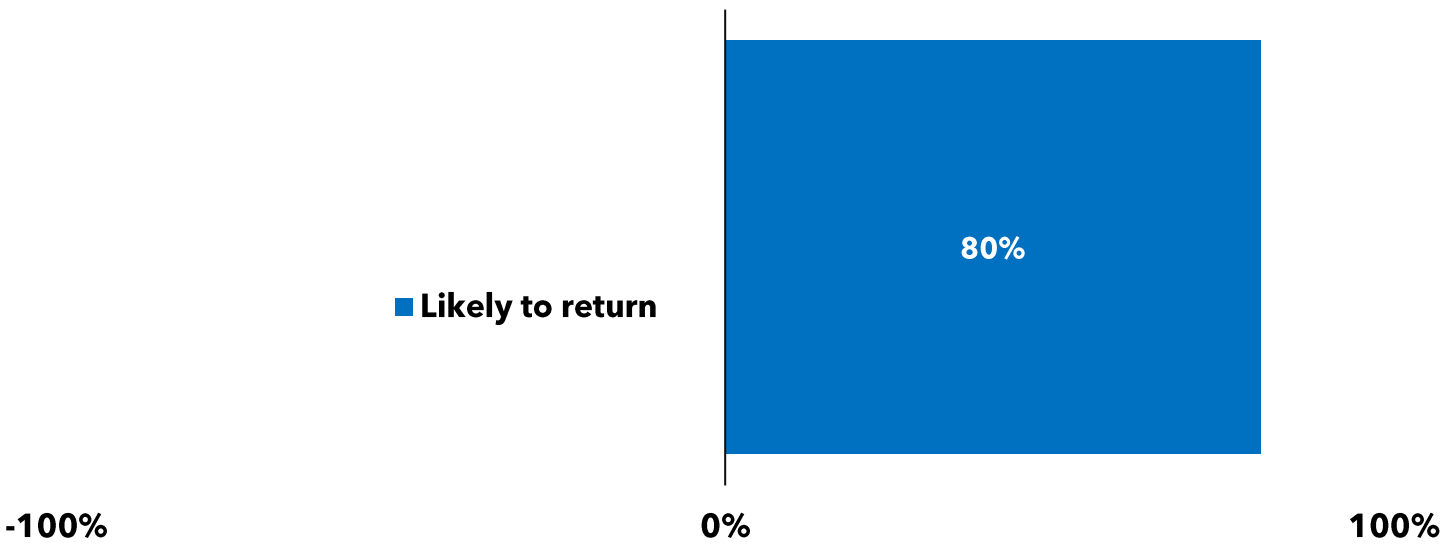
# How did you feel immediately after your visit?



## CONFIDENCE

- Pre and Post-Visit Experience Survey data - when in-person visits were possible
- The act of attending increases confidence significantly

# To what extent has this visit made you MORE or LESS likely to come to more cultural events, venues and activities?

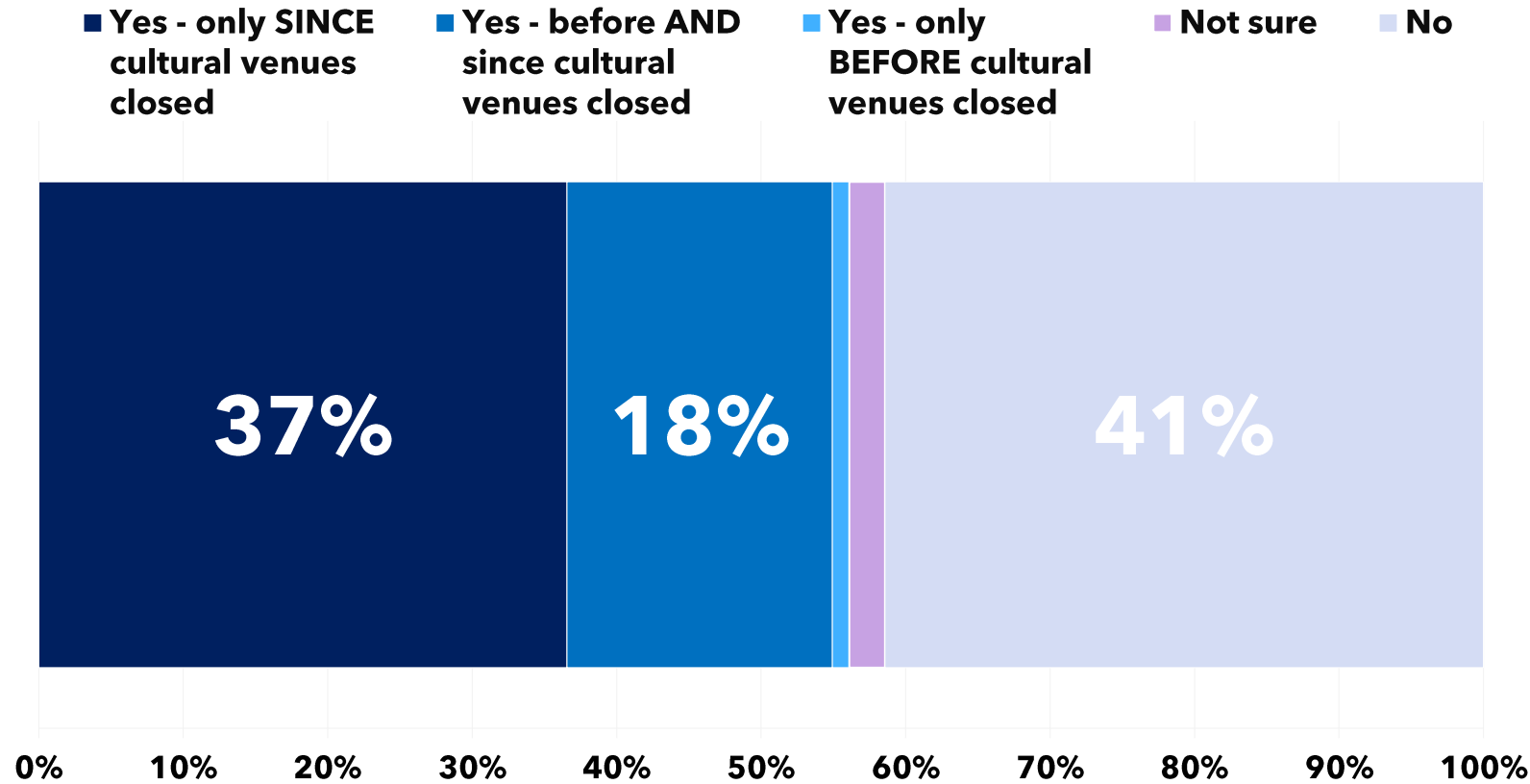


## CONFIDENCE

- AND makes audiences much more likely to attend other cultural events

# Digital engagement with culture

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



CULTURE  
RESTART

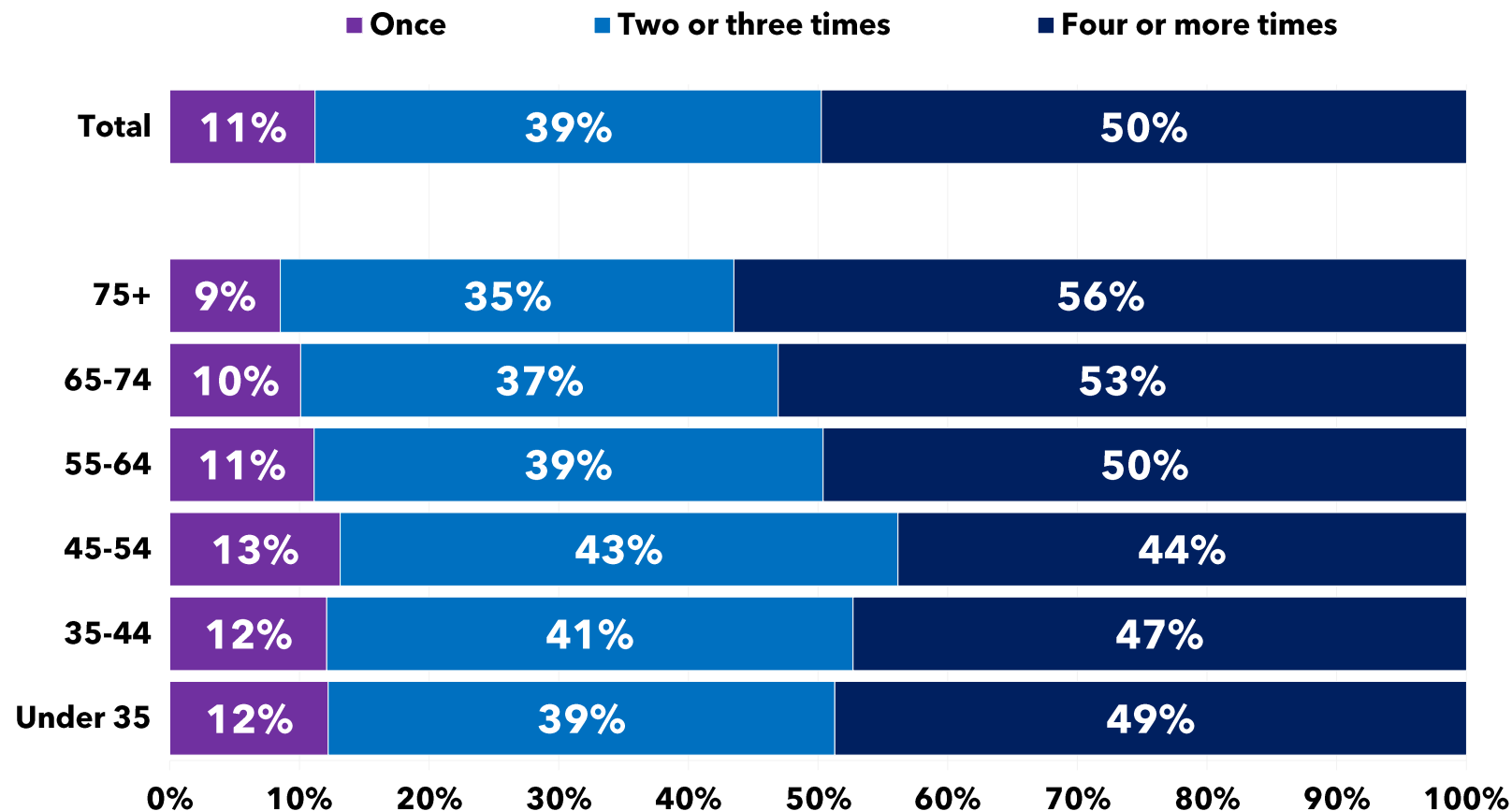


## DIGITAL ENGAGEMENT

- 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?



CULTURE  
RESTART

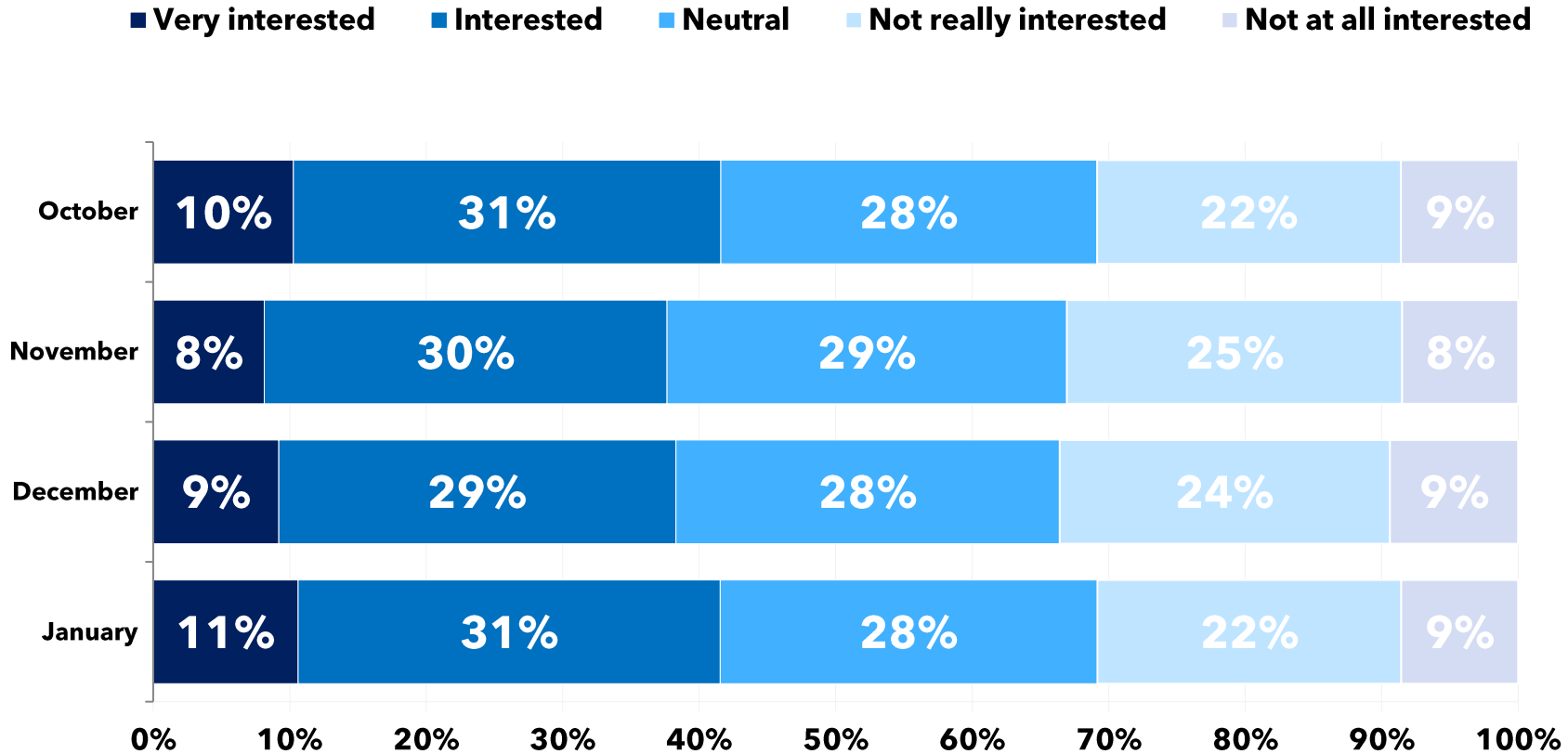


## FREQUENCY OF DIGITAL ENGAGEMENT

- 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?



## INTEREST IN DIGITAL IN FUTURE

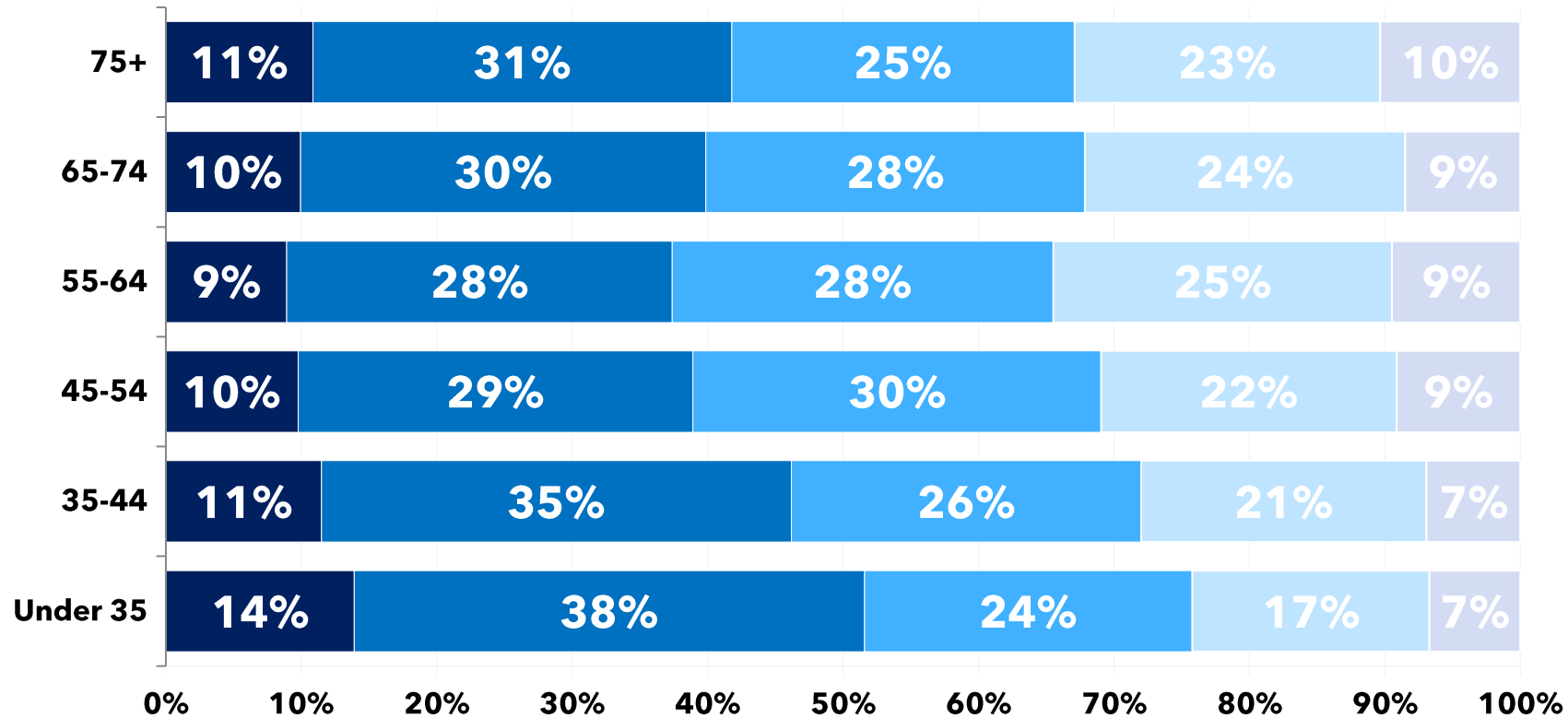
- Those very interested or interested in engaging with culture online increased in January

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?

■ Very interested ■ Interested ■ Neutral ■ Not really interested ■ Not at all interested



## INTEREST IN DIGITAL IN FUTURE

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

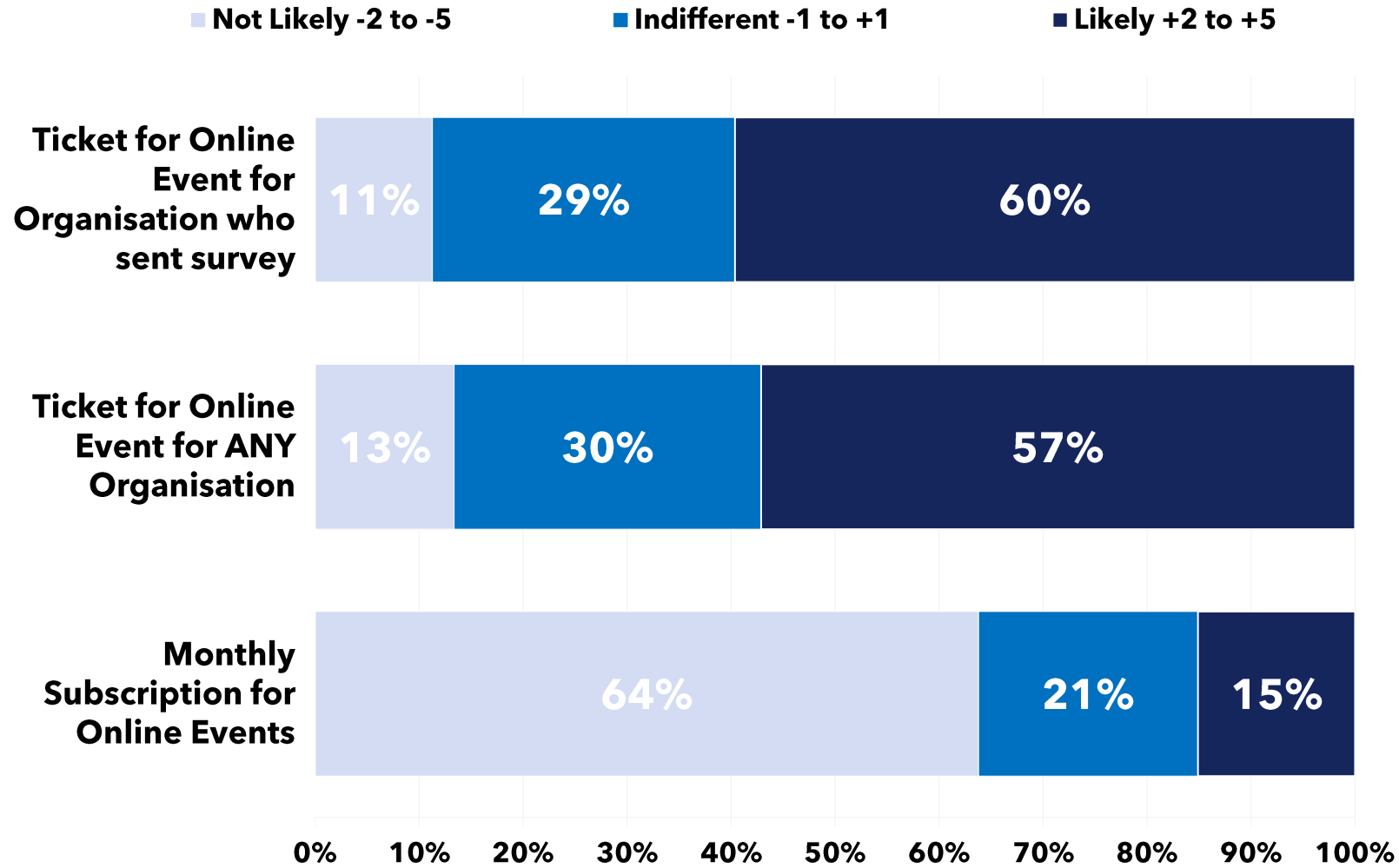
December and January Responses:

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?

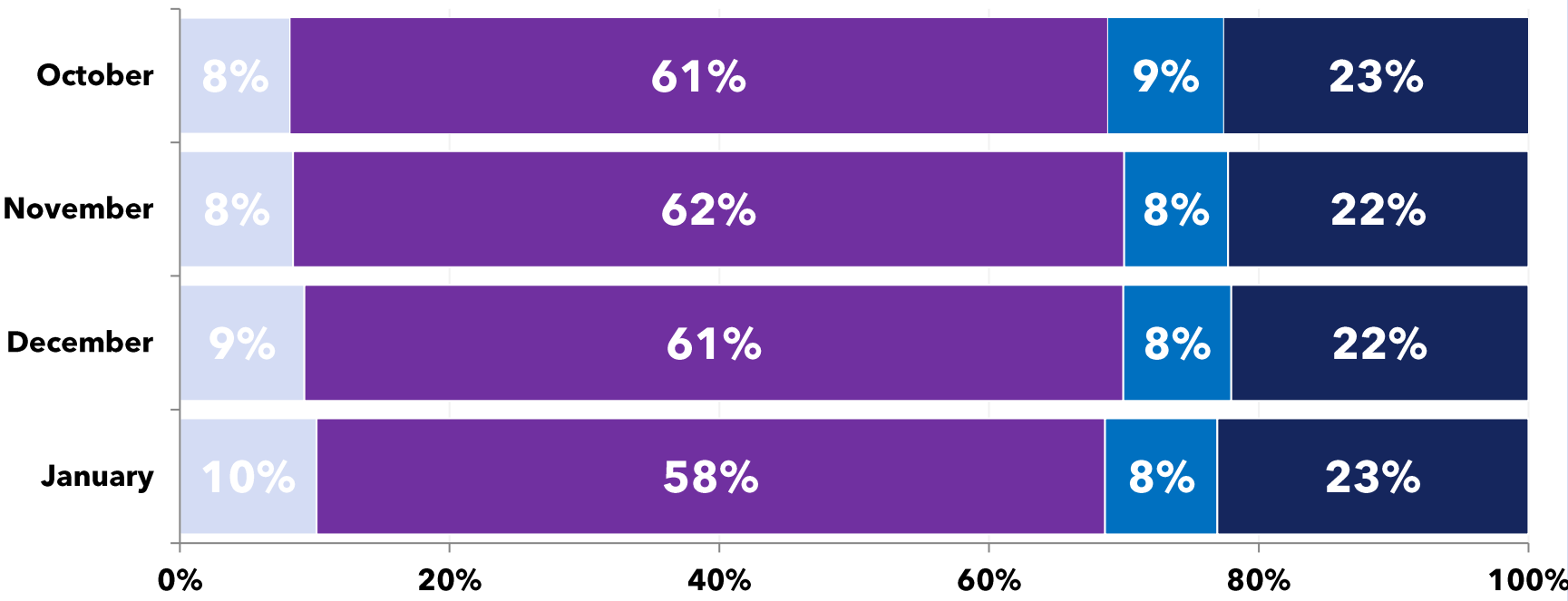


## DIGITAL CULTURE VS IN PERSON ATTENDANCE

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

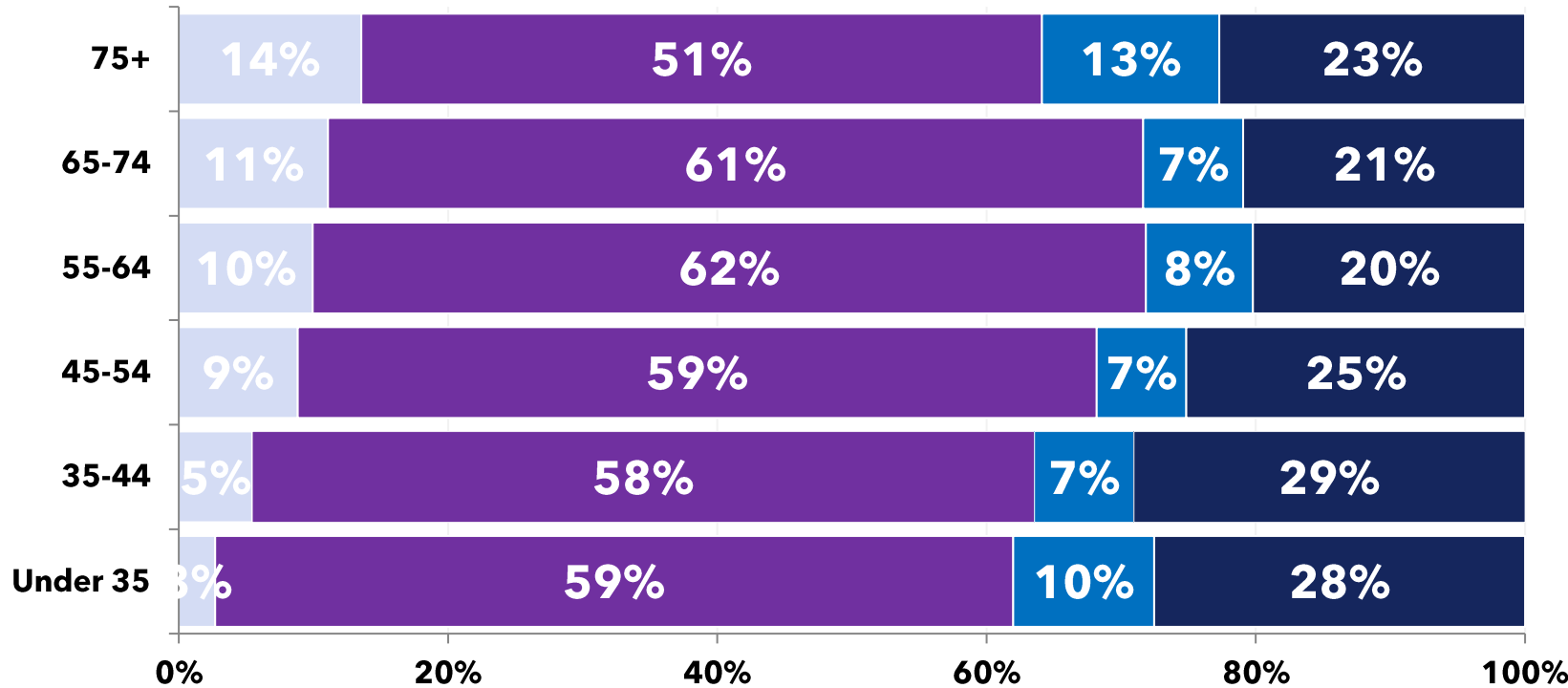
October n = 3,243  
November n = 4,335  
December n = 3,066  
January n = 3,618

■ 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



# 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



CULTURE  
RESTART



## 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

**How easy or difficult did you find it to watch or take part in the online experience?**

4.0★

average rating



CULTURE  
RESTART



## EASE OF USE

- 73% of people found it fairly easy or very easy
- Only 3% of people found it very difficult

How did your experience compare with how you thought it would be?

**64%**

**reported that experiences were Better or Much Better than expected.**

CULTURE  
RESTART



**EXPECTATIONS**

- 26% of people said their expectations were met
- Only 10% said that their experience was worse or much worse than expected

# How did your experience compare with how you thought it would be?

← Tweet

 **Bournemouth Symphony Orchestra** @BSOrche... · Dec 4, 2020

Just announced: Our second series of livestreamed symphonic concerts will run from 6 Jan to 24 Mar 2021 [bit.ly/3ml0ZUU](https://bit.ly/3ml0ZUU)  
#BournemouthSO #HereforCulture #BSOatHome @kkarabits @InvestecWin @Investec 🎵🎵🎵🎵



3 19 38

 **Dr Trixie Gadd** @TrixieGadd

Replying to @BSOrchestra @KKarabits and 2 others

Fantastic news. Having originally signed up to the autumn series simply to support our local orchestra, not necessarily planning to watch all the concerts, I now look forward immensely to my weekly classical fix.

9:41 AM · Dec 4, 2020 · Twitter Web App



# What motivated you to watch or take part?

**75%**

**'Next best' thing to attending or  
visiting in person**

**72%**

**Supporting the venue/promoter**

CULTURE  
RESTART



## MOTIVATIONS

- There is an opportunity right now to capitalise on the desire to support organisations

**What would be your attitude to attending or visiting the cultural organisation IN PERSON as a result of watching/taking part in this online experience?**

**60%**

**Said it would make no difference**

**34%**

**Would be MORE likely to visit**

CULTURE  
RESTART



## **CANNIBALISATION**

- **No evidence that digital experiences take away from live audiences**
- **This might vary depending on the type of offer**
- **Cannibalisation should be outweighed by greater distribution**



WHAT'S ON

SUPPORT US

PLAYWRITING

MORE ...

# My White Best Friend (and Other Letters Left Unsaid)

Co-curated by writer Rachel De-Lahay and director Milli Bhatia

[Details](#) / [Extras](#) / [The Company](#)



## Black Ticket Project

Half the tickets for the readings are available for free through the Black Ticket Project.

[Find out more](#)

High contrast mode  Access

**Dream** Story & production Cast & credits FAQs Contact UK schools [Get ticket](#)

# Dream

**A live, online performance set in a virtual midsummer forest**

Theatre, music and groundbreaking technology combine in an extraordinary exploration into the future of live performance. Follow a sprite on a moonlit journey through the night until dawn.

**12-20 March 2021**  
Running time: 50 minutes

19 DAYS : 8 HOURS : 23 MINUTES : 44 SECONDS

[Get ticket](#) [Watch trailer](#) [Performance schedule](#)

An original production from **Philharmonia**

**Brought to you by the Audience of the Future Consortium** [Find out more](#)

The project is funded within the Audience of the Future programme by UK Research and Innovation through the Industrial Strategy Challenge Fund

Dream is generously supported by Miranda Curtis CMG, the Sidney E. Frank Foundation, Audrey Mandela and Sean Phelan, and is an EPIC MegaGrants recipient

New work at the RSC is generously supported by The Drue and H.J. Heinz II Charitable Trust

Supported using public funding by **ARTS COUNCIL ENGLAND**

© RSC - Dream 2021 | [Privacy Policy](#) | [Terms and Conditions](#) Website by FX Digital

High contrast mode  Access

**Dream** Story & production Cast & credits FAQs Contact UK schools [Get ticket](#)

## Choose your ticket

There are two ways to experience Dream. Choose the route that suits you.

### Audience Plus

Become a firefly. Immerse yourself in the world of Dream, explore the magical forest and interact with the performance to influence the outcome.

- Interactivity
- Priority access to the pre-show Dream Lobby
- Priority access to the aftershow area
- Live captions available for all performances

You need one ticket per interactive device

**£10.00**

[Get ticket](#)

Via our booking partner Royal Shakespeare Company

### Audience

Sit back and watch the live streamed performance without interactions. Book a ticket to receive pre-show reminders and get priority access.

- Interactivity
- Priority access to the pre-show Dream Lobby
- Priority access to the aftershow area
- Live captions available for all performances

You need one ticket per household

**Free**

[Get ticket](#)

Via our booking partner Royal Shakespeare Company

**Not ready to book?** [Sign up for updates](#)

**Brought to you by the Audience of the Future Consortium** [Find out more](#)

The project is funded within the Audience of the Future programme by UK Research and Innovation through the Industrial Strategy Challenge Fund

Dream is generously supported by Miranda Curtis CMG, the Sidney E. Frank Foundation, Audrey Mandela and Sean Phelan, and is an EPIC MegaGrants recipient

New work at the RSC is generously supported by The Drue and H.J. Heinz II Charitable Trust

Supported using public funding by **ARTS COUNCIL ENGLAND**

© RSC - Dream 2021 | [Privacy Policy](#) | [Terms and Conditions](#) Website by FX Digital

**CULTURE  
RESTART**





## Each of us has heaven and hell in them.

In a profile pic-obsessed, filter-fixated world where online and reality blur, influencer Dorian Gray makes a deal. For his social star never to fade. For the perfect self he broadcasts to the world to always remain. But as his mental health starts to decline, as corruption and murderous depravity start to creep into his world, the true and horrific cost of his deal will soon need to be met.

From the team behind the New York Times Critic's Pick, five star "game-changer" (Telegraph) online production of *What a Carve Up!* comes a brand-new adaptation that brings Oscar Wilde's Faustian tale kicking and screaming into a world of Instagram, Facebook and dating apps.

Age guidance 16+

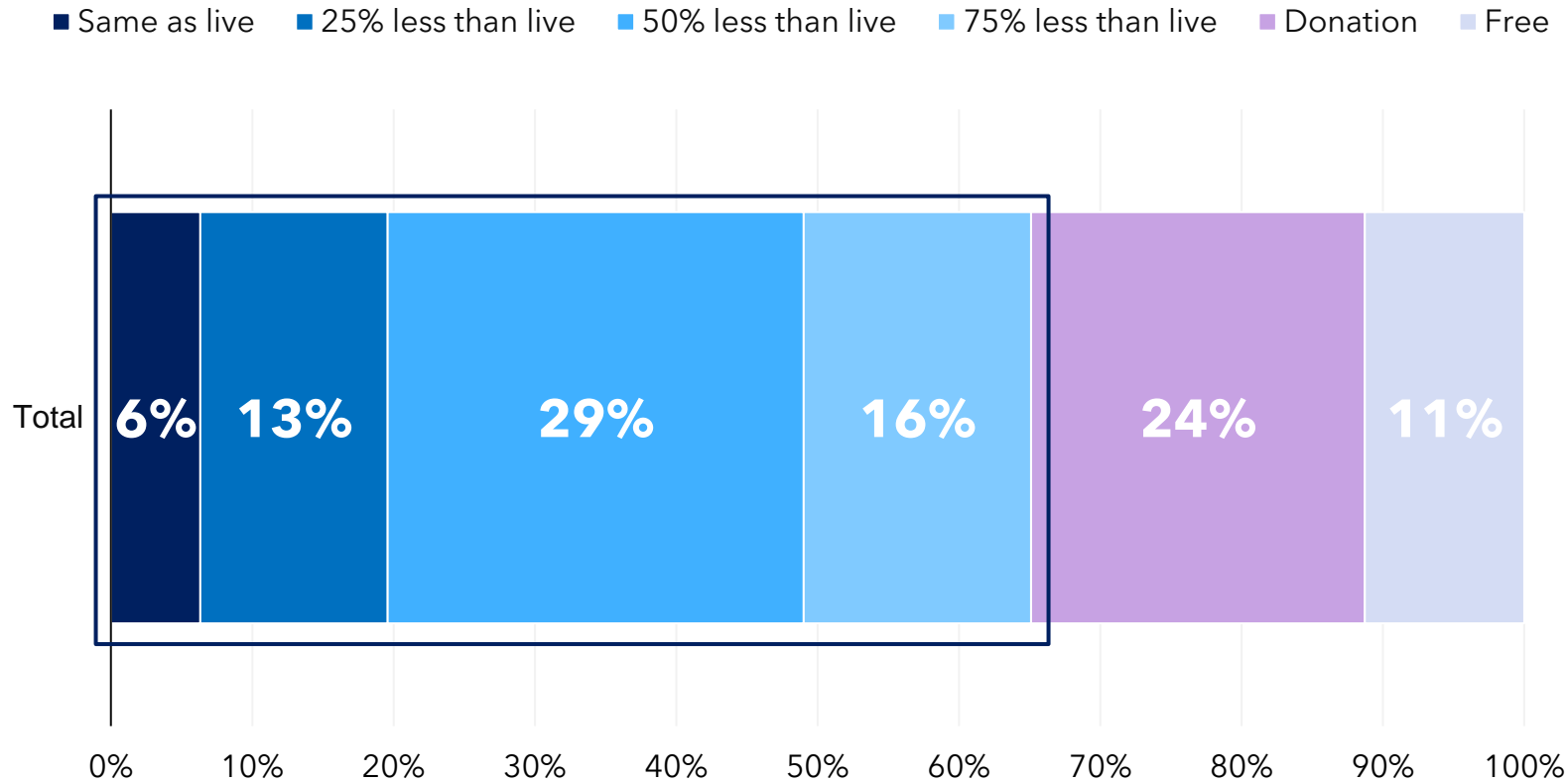
Content warning: *The Picture of Dorian Gray* includes extremely strong language and references to suicide and mental illness that some viewers may find upsetting. If you have been affected by any of the issues in *The Picture of Dorian Gray* [click here](#) for information on organisations that may be able to offer additional support.

# Paying for Digital



64% would pay for digital

# How much would you expect to pay for digital experiences?



CULTURE  
RESTART



## PAYING FOR DIGITAL EVENTS

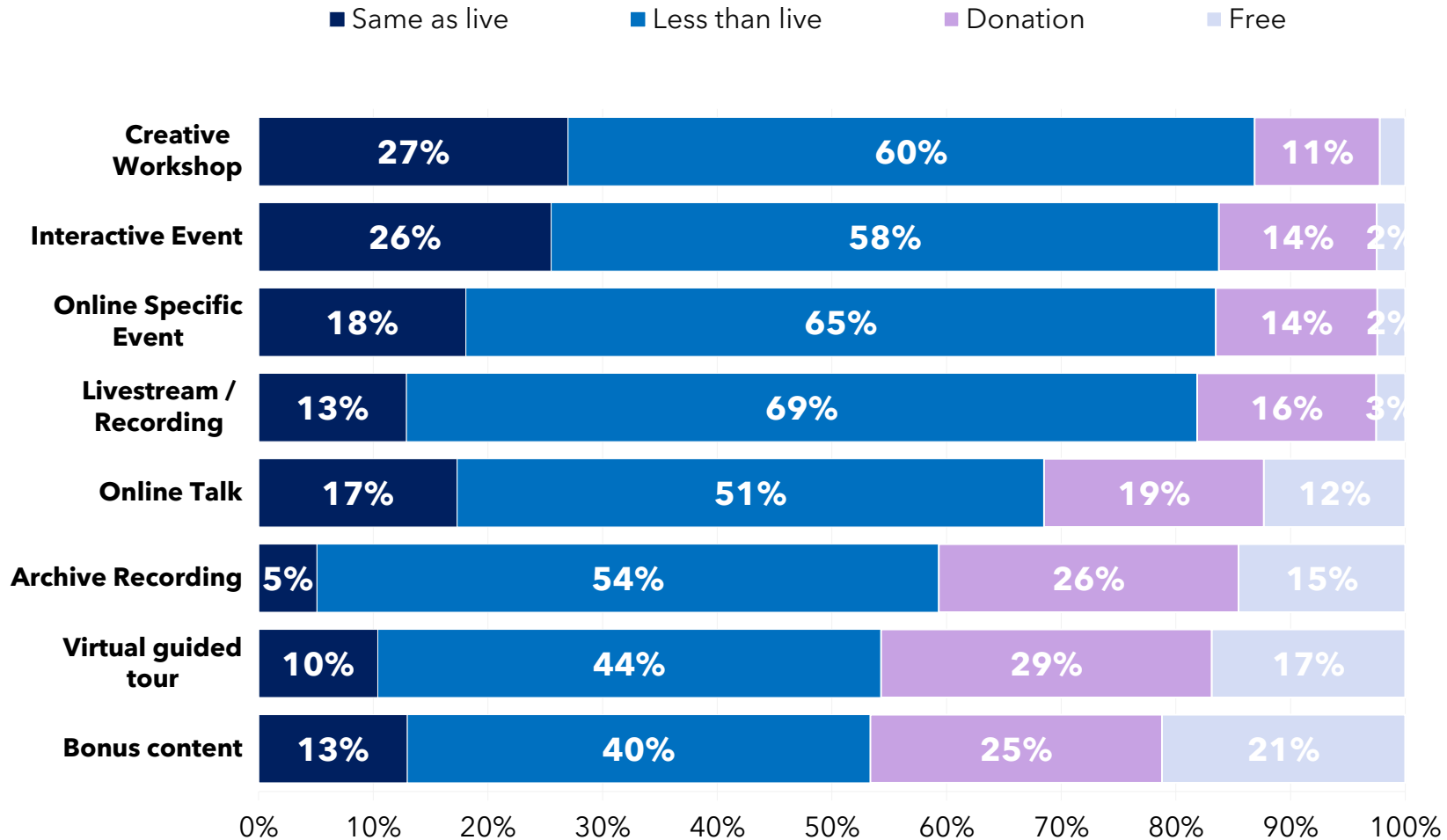
- 64% of respondents expect to pay for digital experiences
- Nearly half expect to pay at least 50% of the equivalent price for live

n = 8,501

*\*Excluding workshops, talks, bonus content, virtual tours*



# How much would you expect to pay for each of these experiences?

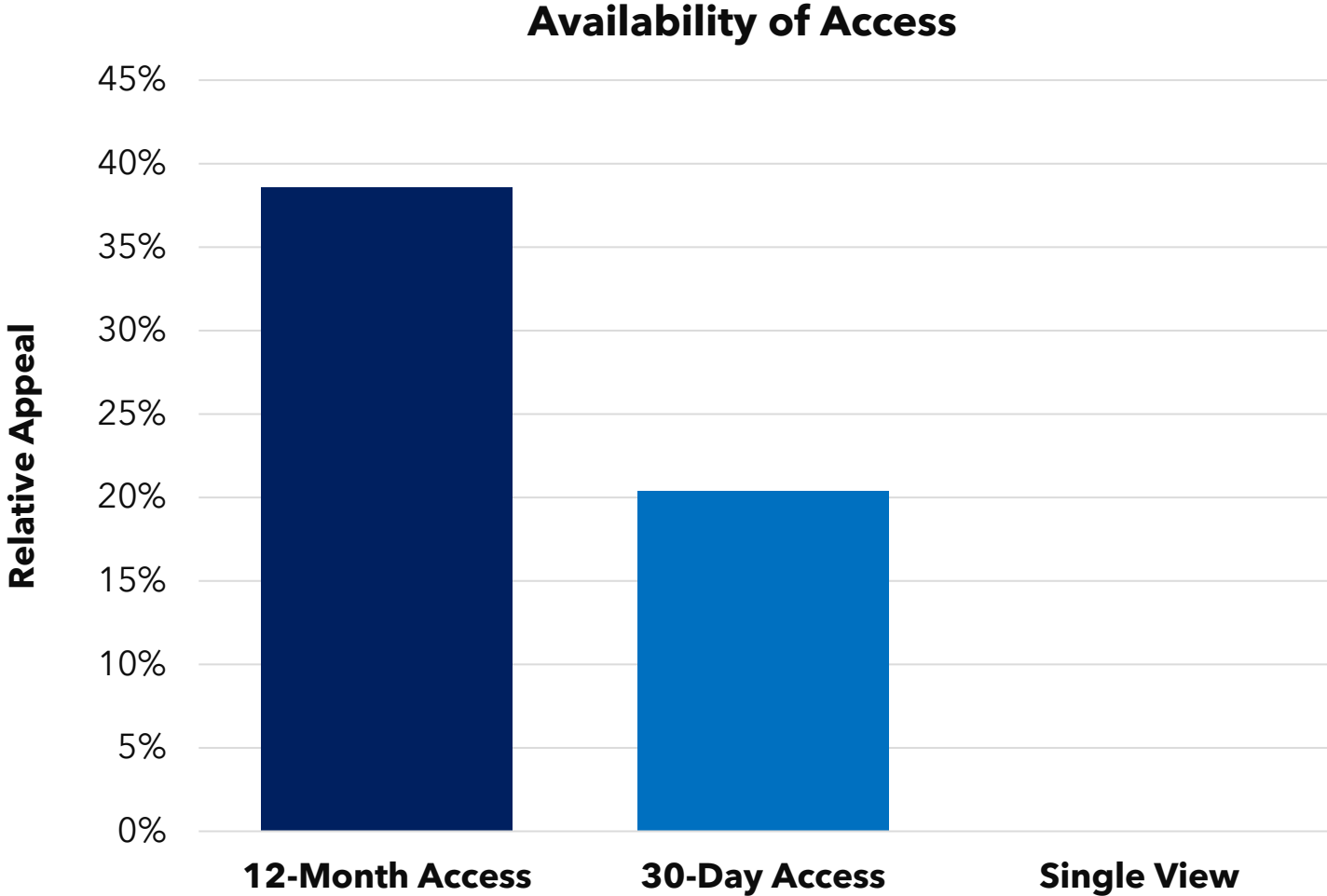


## PAYING FOR DIGITAL EVENTS

- For interested in specific events, they are more likely to pay for online specific events and livestreams as well as interactive events and creative workshops
- They are less likely to pay for archive recordings, talks, tours and bonus content

n = 7,508

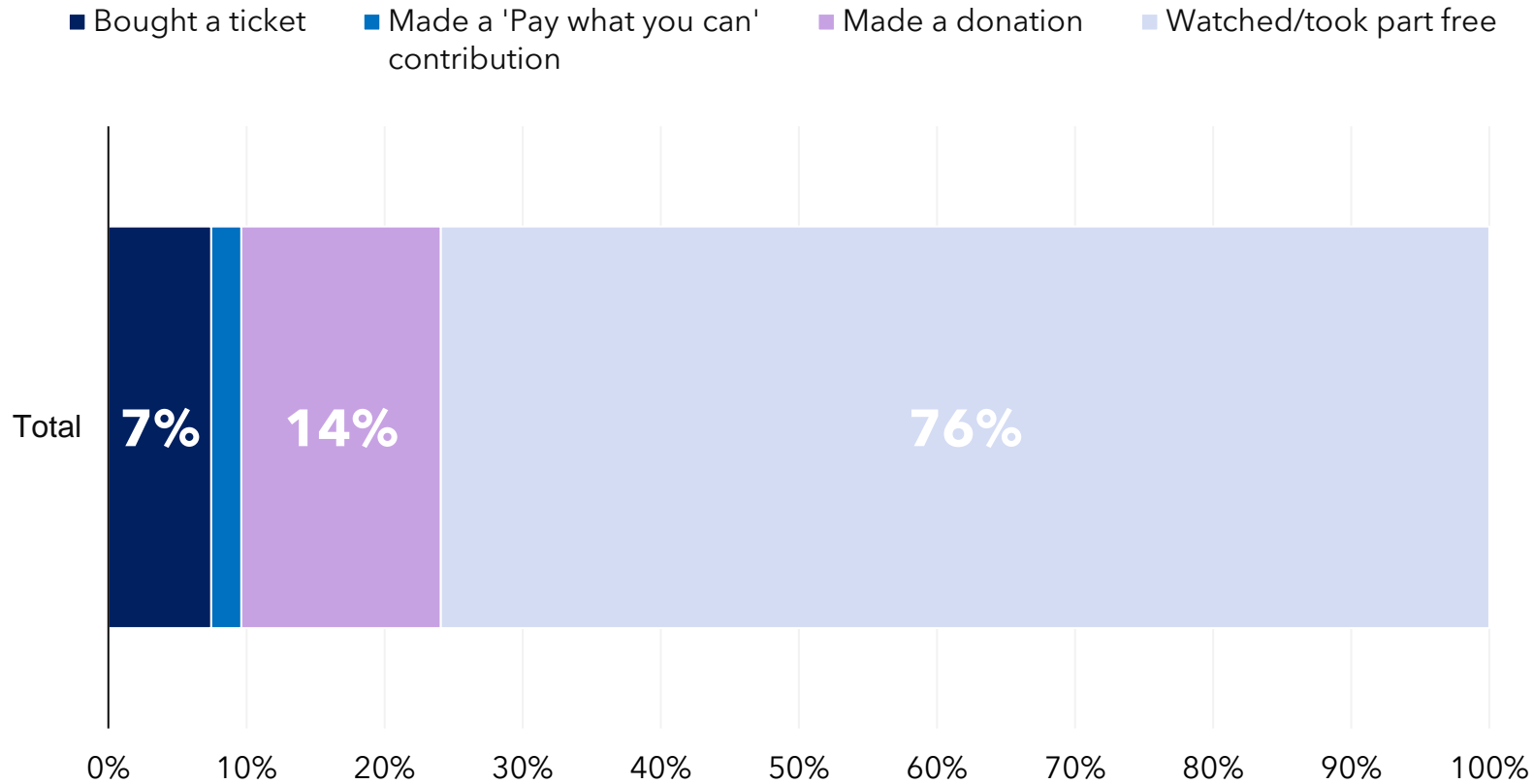
# Availability of access to digital is also a key differentiator



## PAYING FOR DIGITAL EVENTS

- **From Baker Richards research on digital, we found that 12-Month Access is about 20% more appealing than 30-Day Access, which is turn about 20% more appealing than Single View**

# Which of the following have you done in relation to digital events?

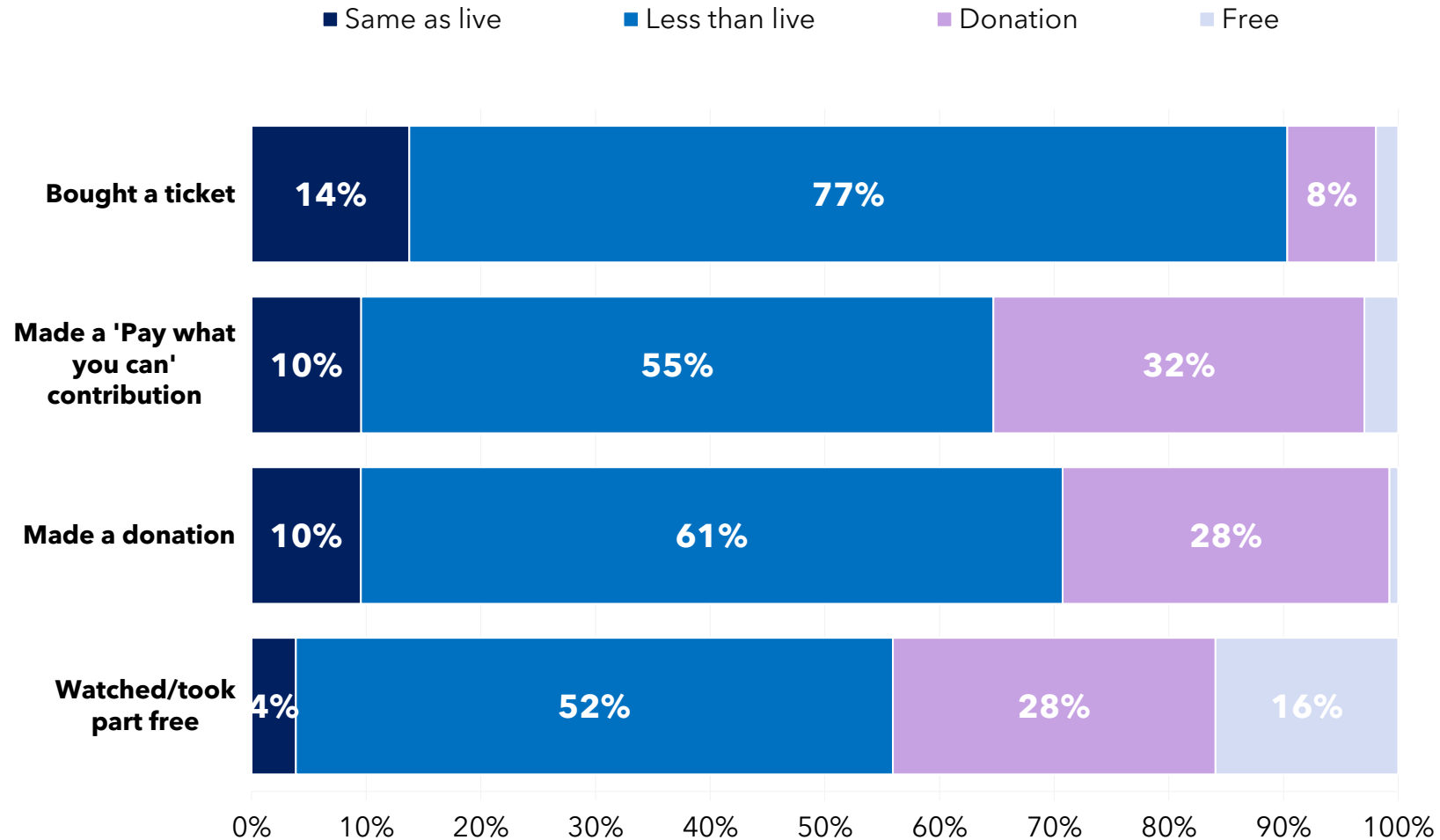


## PAYING FOR DIGITAL EVENTS

- Only 7% of those who have watched or taken part in digital experiences have bought a ticket for it
- The majority (76%) have experienced it for free

n = 6,240

# How much would you expect to pay for each of these experiences?



## PAYING FOR DIGITAL EVENTS

- Those who have experienced it for free are much less likely to expect to pay for it in future
- While those who bought a ticket are more likely to pay in future

n = 6,240

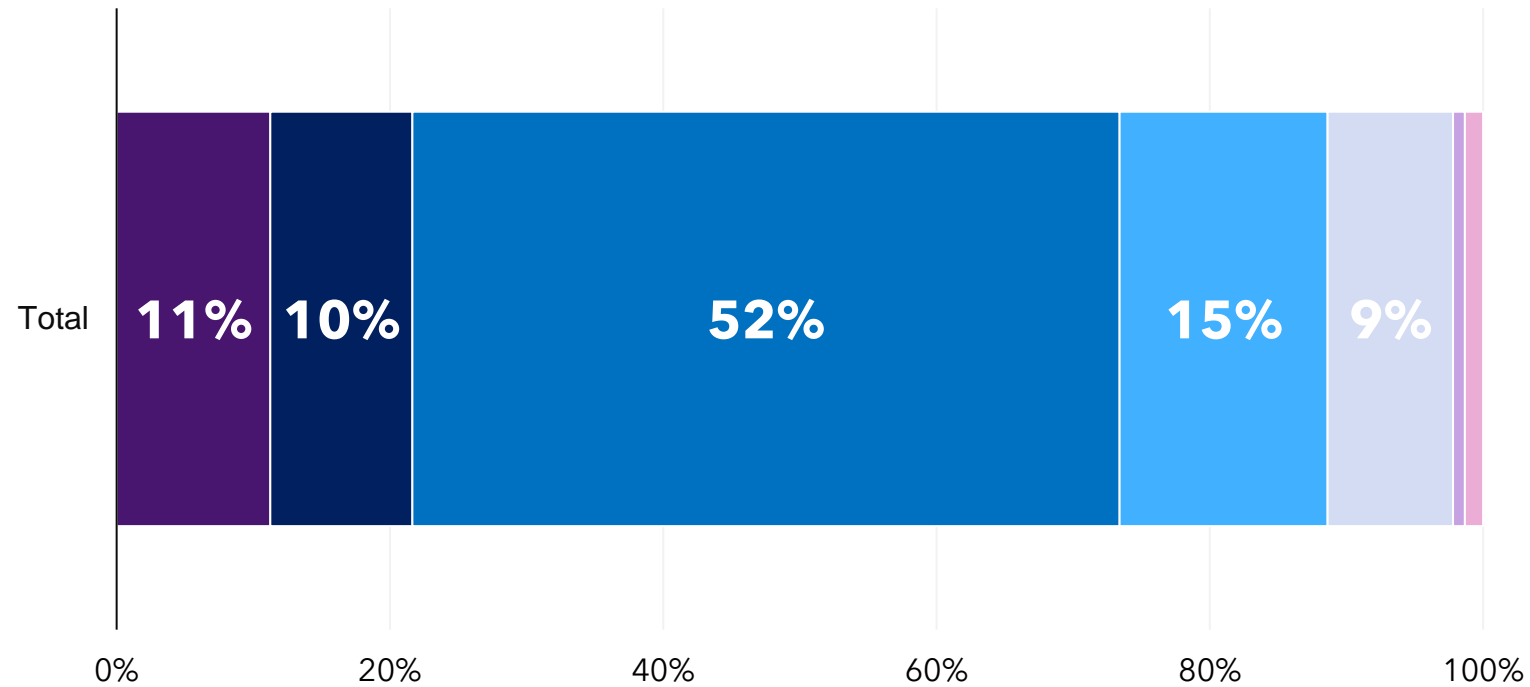
# Digital Experience Survey



For organisations presenting work online, the Culture Restart Digital Experience Survey is designed to capture audience sentiment after watching or taking part in a digital cultural experience.

# How much did you pay to watch or take part?

More than £30   £20 - £30   £10 - £20   Less than £10   Nothing   Not sure   It was a gift



CULTURE  
RESTART

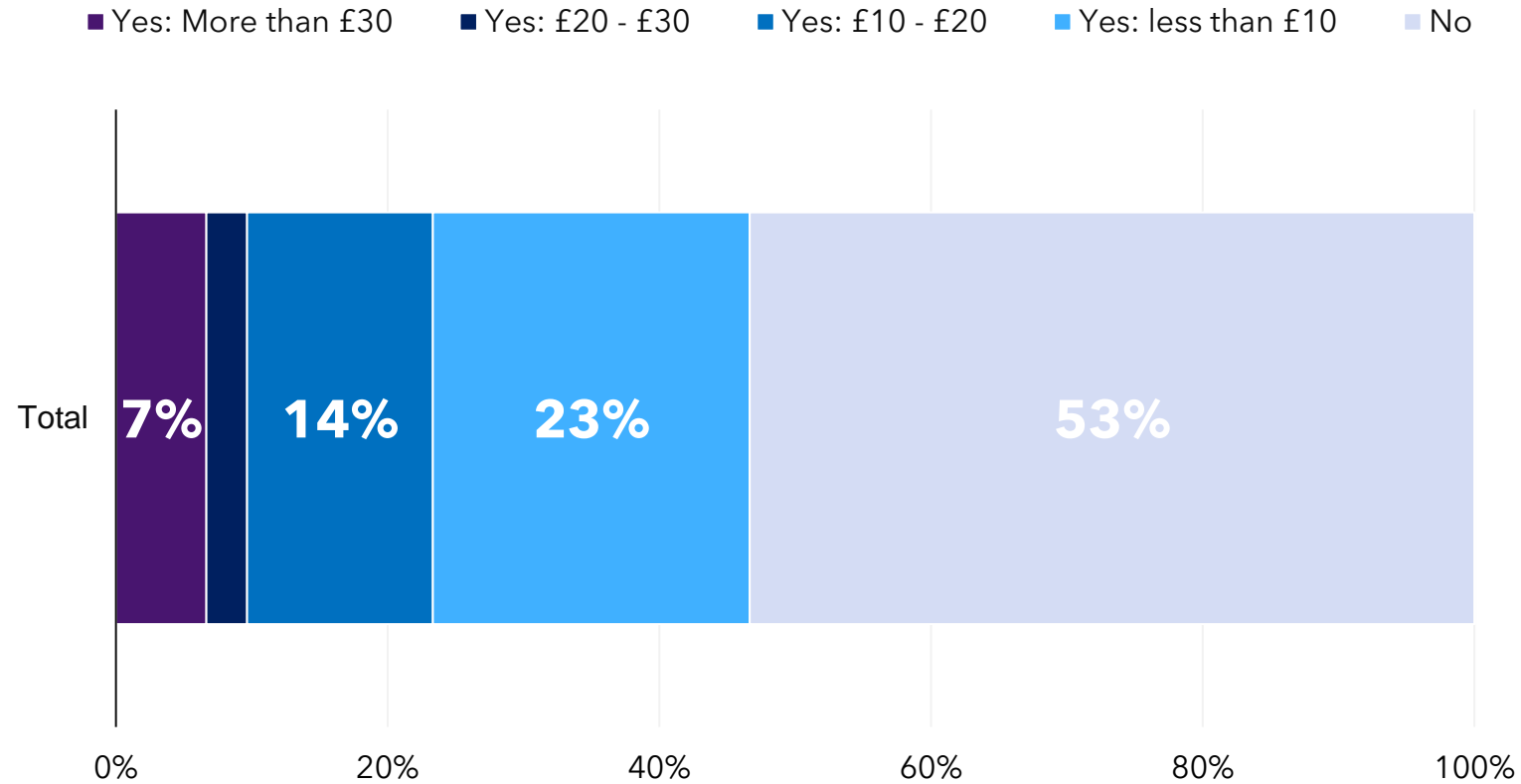


## PAYING FOR DIGITAL EVENTS

- **Over 50% of those who bought a ticket paid between £10 and £20**
- **But another 21% paid over £20**

n = 906

# Did you also make a donation?



CULTURE  
RESTART



## DONATING FOR DIGITAL EVENTS

- **Of those who bought a ticket just under 50% also made a donation**
- **23% donated less than £10**
- **24% donated more than £10**

n = 900

# Anchoring



- **Would you like to donate?** **\$64**
- **Would you like to donate \$5?** **\$20**
- **Would you like to donate \$400?** **\$143**



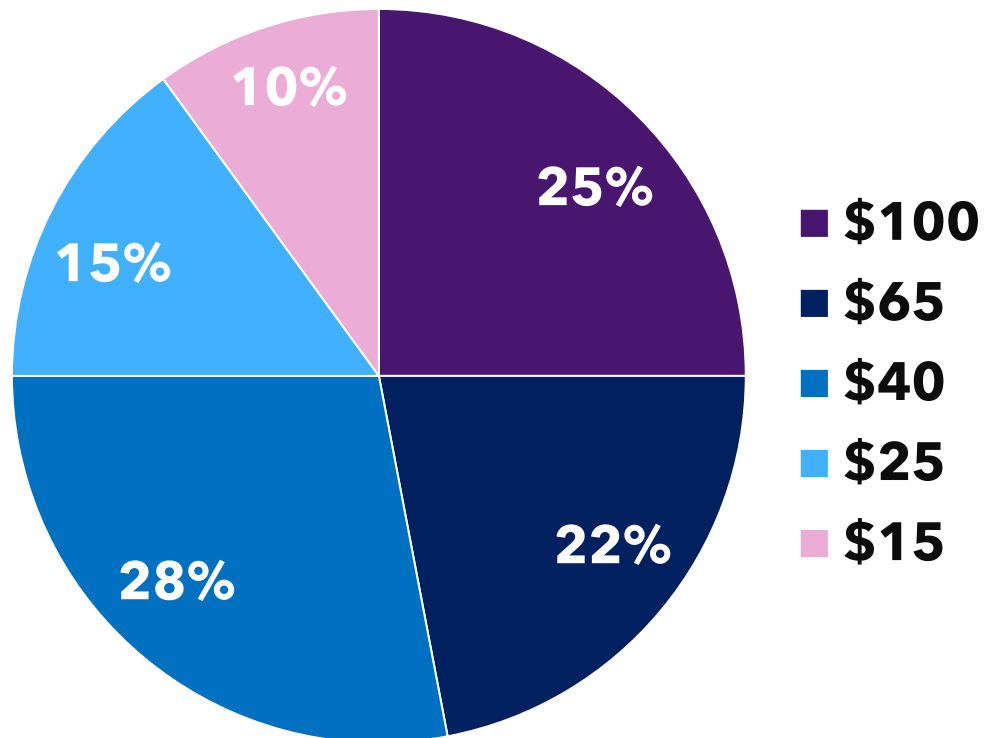
### Signature: Schubert and the Swedish Mozart (available on-demand)

The Schubert and the Swedish Mozart concert will be available to view on-demand from February 1 at 10:00AM until Sunday, February 28, 2021 at 11:59PM. You may view this concert as many times as you would like during the availability period.

“Multiple prices are available for purchasing online concert streams, to allow you to choose your price based on your current situation. When selecting your price, you might consider how many people in your household will be watching the stream, and what you might usually spend on attending a concert.”

Video On-Demand: Choose Your Price - \$100.00	<input type="text" value="0"/> ▼
Video On-Demand: Choose Your Price - \$65.00	<input type="text" value="0"/> ▼
Video On-Demand: Choose Your Price - \$40.00	<input type="text" value="0"/> ▼
Video On-Demand: Choose Your Price - \$25.00	<input type="text" value="0"/> ▼
Video On-Demand: Choose Your Price - \$15.00	<input type="text" value="0"/> ▼

- \$20,000\* more in ticket revenue than we would have had we charged a single price.



- **44% of total revenue come from the top two price points (\$100, \$65)**
- **72% of total revenue come from the top three price points (\$100, \$65, \$40)**
- **\*A single price point of \$15 would have left more than \$15,000 in revenue on the table!**

<https://www.jcainc.com/blog/archive/kws-success-story/>

## Cal Performances at Home Pricing

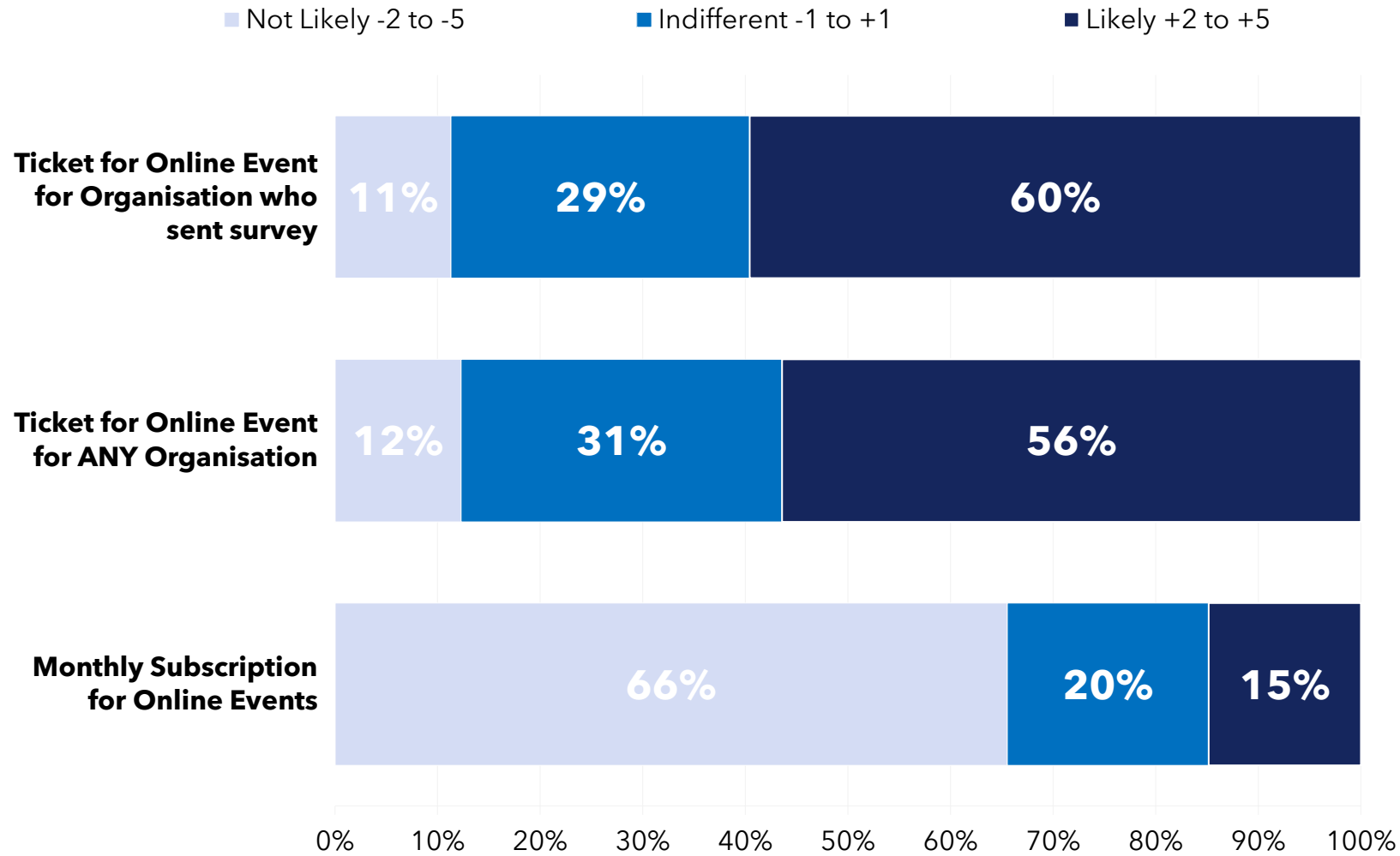
### General Public

The pricing for individual *Cal Performances at Home* performances is on the honor system and is based on the number of people watching the performance.

All Access	Going Solo	Date Night	Social Bubble	Rock Star
\$0	\$15	\$30	\$60	\$68
Free for Subscribers and Donors \$225+	One person viewing the performance	Two people viewing the performance	Four or more people viewing the performance	Average price you would have paid to see this live*

\* "Rock Star" is, well, above and beyond! You're a true believer, a superhero in our book.

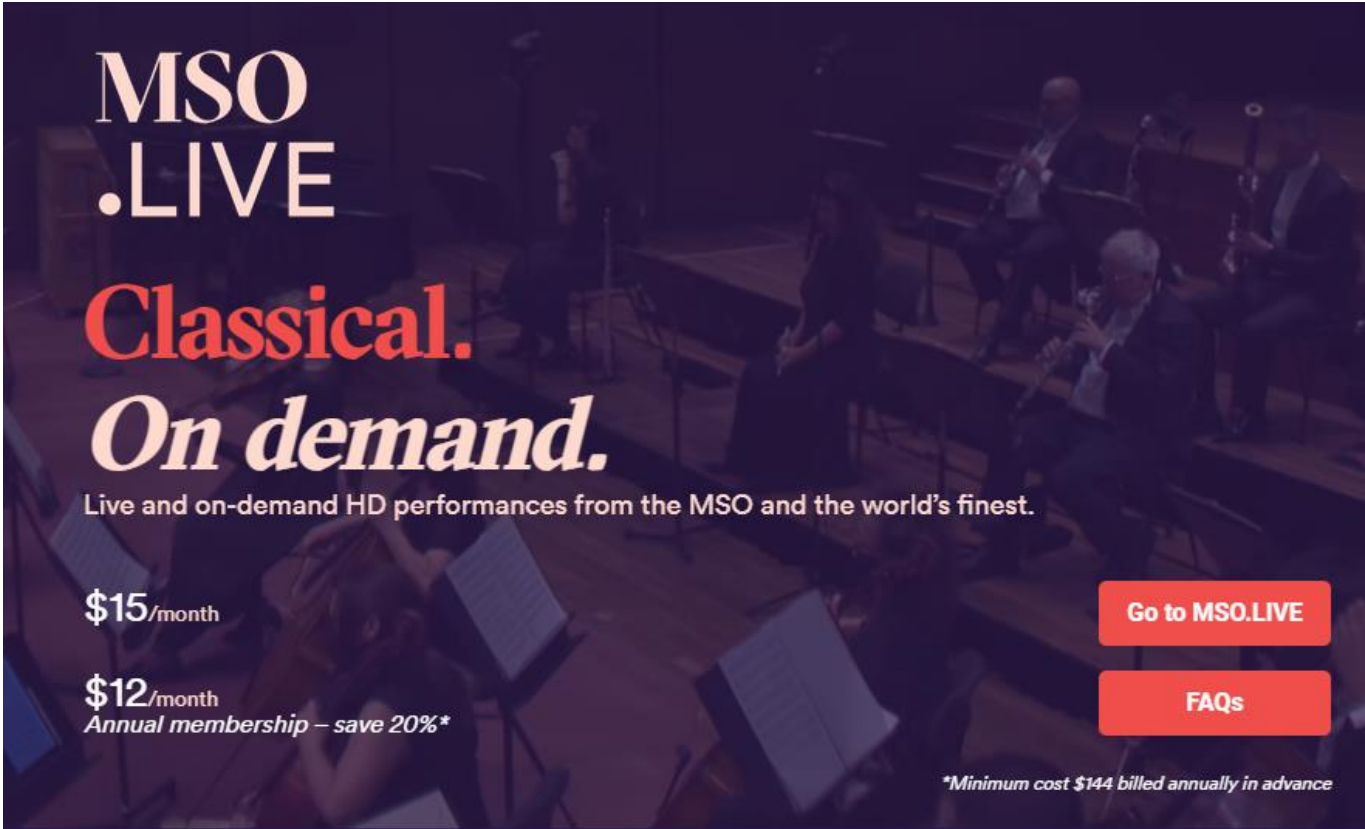
# How likely would you be to buy a...?



## 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 = 6860; 6,661; 6,680



**MSO**  
**.LIVE**

**Classical.**  
***On demand.***

Live and on-demand HD performances from the MSO and the world's finest.

\$15/month

\$12/month  
Annual membership – save 20%\*

[Go to MSO.LIVE](#)

[FAQs](#)

\*Minimum cost \$144 billed annually in advance

**EXCLUSIVE CONCERTS**  
PLUS PAY-PER-VIEW OPTIONS

**WATCH ON TWO DEVICES**  
PER MEMBERSHIP ACCOUNT

**NEW CONCERTS MONTHLY**  
FEATURING THE MSO & WORLD ORCHESTRAS

**ACCESS FREE CONTENT**  
PROGRAMS FOR KIDS, AUDIO, AND MORE

# Key Takeaways: Paying for Digital

**Beware of free** - most people are **willing to pay** something for digital events even if it's just by way of showing their support

**One price does not fit all** - think about how you might apply **price differentiation** to ensure you appeal to a range of what people are willing to pay

Don't forget your **price anchors** even when it comes to asking for additional donations

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

**This is a formative moment for many people's engagement with digital content**

**There's a window of opportunity to move audiences across to digital delivery (which they are enjoying) and motivate people to support out organisations.**

# Key Takeaways - planning for re-opening

We need to **build confidence** for audiences who are currently very wary

The **point of booking** is when people first need to feel reassured – about safety, and risk re: refunds etc.

**Social distancing** measures may not be required legally from June, but may be necessary for audience confidence



## Audience Spectrum

The Audience Agency have looked at how Culture Restart responses vary by the different Audience Spectrum groups

## Disabled and vulnerable audiences

Specialist access and inclusion consultant Morwenna Collett has examined what responses from disabled and vulnerable audiences are telling us

Are you  
signed up?

MORE ORGANISATIONS TAKING PART ENABLES:

- MORE DATA
- MORE INSIGHTS
- GRANULAR SEGMENTATION

JOIN TODAY AT

**indigo-ltd.com**

# Download the data

YOU CAN DOWNLOAD THE FULL REPORT FROM

**indigo-ltd.com**  
**baker-richards.com**

USE THE CHAT BOX ON YOUTUBE TO SEND IN  
QUESTIONS OR COMMENTS

# Q&A