



CULTURE
RESTART

Culture Restart audience tracker

Wave 1

October 2020

INSIGHTS
ALLIANCE

indigo

BAKER**RICHARDS**

One Further

supporting cultural recovery

Watch on YouTube for live chat / Q&A

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RESTART



CULTURE RESTART

Culture Restart audience tracker

Baseline Report
October 2020

INSIGHTS ALLIANCE

indigo

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supporting cultural recovery

Live in 2 days
26 November, 14:00

Set reminder

Top chat ▾

Welcome to live chat! Remember to guard your privacy and abide by our Community Guidelines.

[LEARN MORE](#)

Baker Richards
Say something...

0/200

HIDE CHAT

Watch on YouTube for live chat / Q&A

Culture Restart: October 2020 Findings

The image shows a YouTube video player interface. At the top left, the video title 'Culture Restart: October 2020 Findings' is displayed, with a red rectangular box highlighting it. A large blue arrow points from the top right towards this title. Below the title is a video thumbnail with the same title and the 'CULTURE RESTART' logo. To the right of the thumbnail are icons for 'Watch later' and 'Share'. Below the thumbnail, the text 'Culture Restart audience tracker' is visible, followed by 'Baseline Report' and 'October 2020'. On the right side of the player, the logos for 'INSIGHTS ALLIANCE', 'indigo', 'BAKERRICHARDS', and 'One Further' are listed, with the tagline 'supporting cultural recovery' at the bottom. At the bottom left of the player, there is a notification bar that says 'Live in 2 days 26 November, 14:00' and a 'Set reminder' button.

Organised by
Insights Alliance

Following

Contact

Today's Speakers



Katy Raines

Partner

indigo



David Reece

Deputy CEO

BAKERRICHARDS



Chris Unitt

Founder

One Further

After the Interval

16 April - 27 May
317 Cultural
Organisations
137k responses

After the Interval Act 2

1 June - 15 July
258 Cultural
Organisations
103k responses

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

Survey Overview



SURVEY DATE

OCT 2020



RESPONSES

4,945



PARTICIPATING ORGANISATIONS

24

Respondent profile



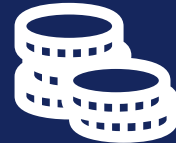
AGE

33% OVER 65
14% UNDER 45



LOCATION

**99% FROM OUTSIDE
LONDON**



FINANCES

20% HAVE LOST INCOME

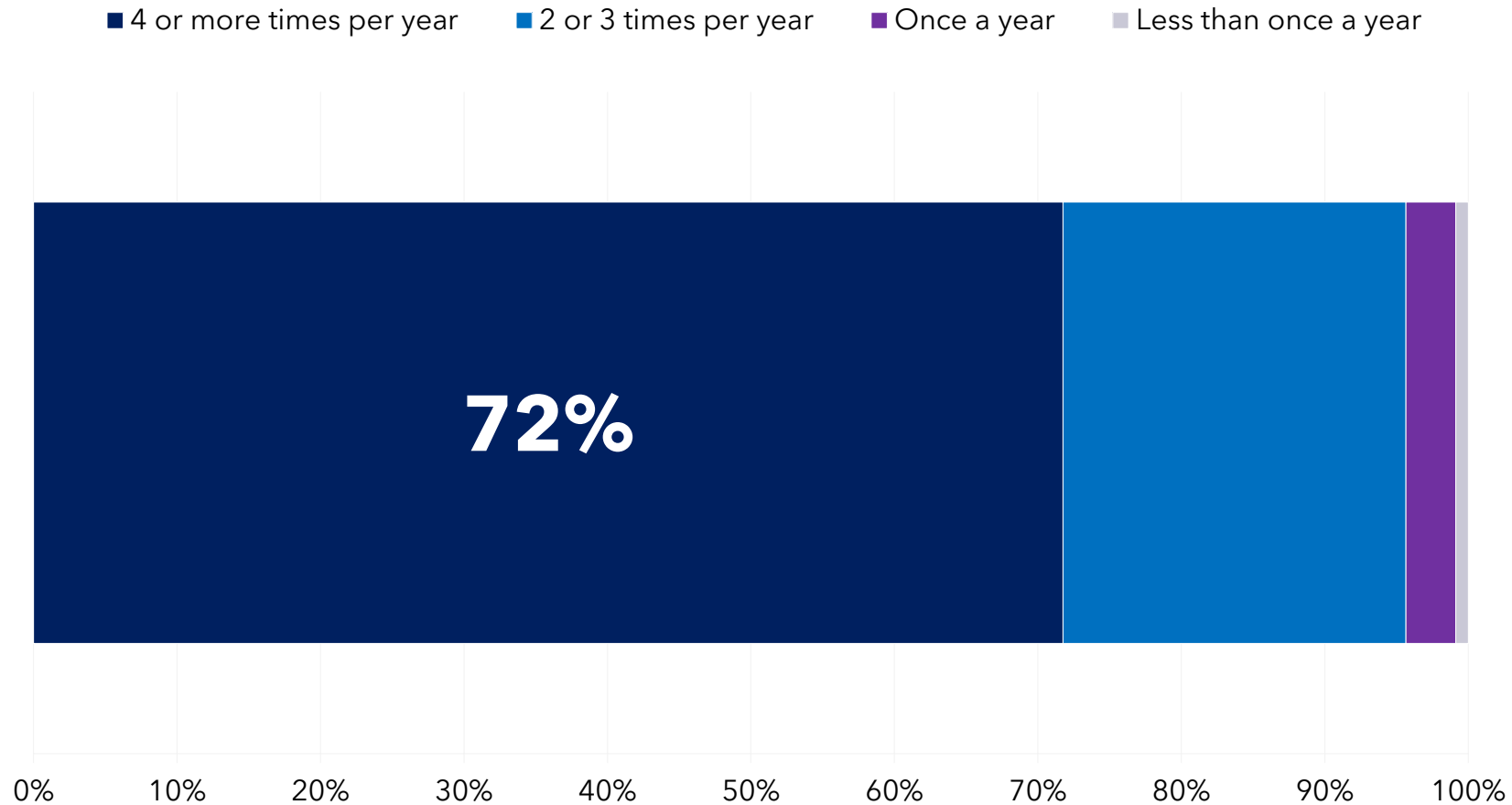


VULNERABLE

**27% CLASSED AS
VULNERABLE**

Attendance pre-Covid

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

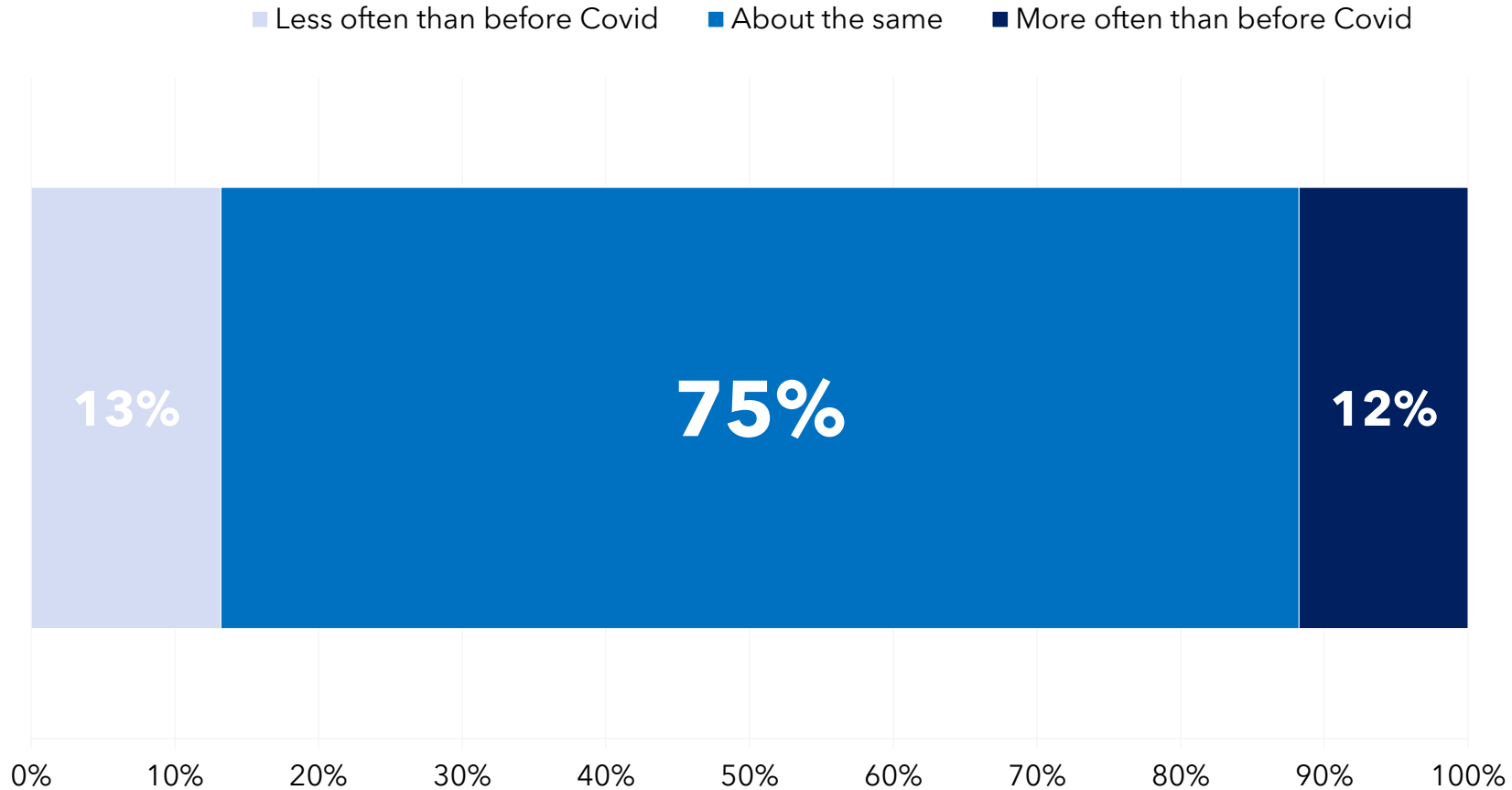


HOW OFTEN?

- 72% of respondents were attending or visiting 4 or more times a year pre-Covid

n = 4,945

Once you feel comfortable returning to cultural experiences again, how **OFTEN** do you anticipate that you will attend?



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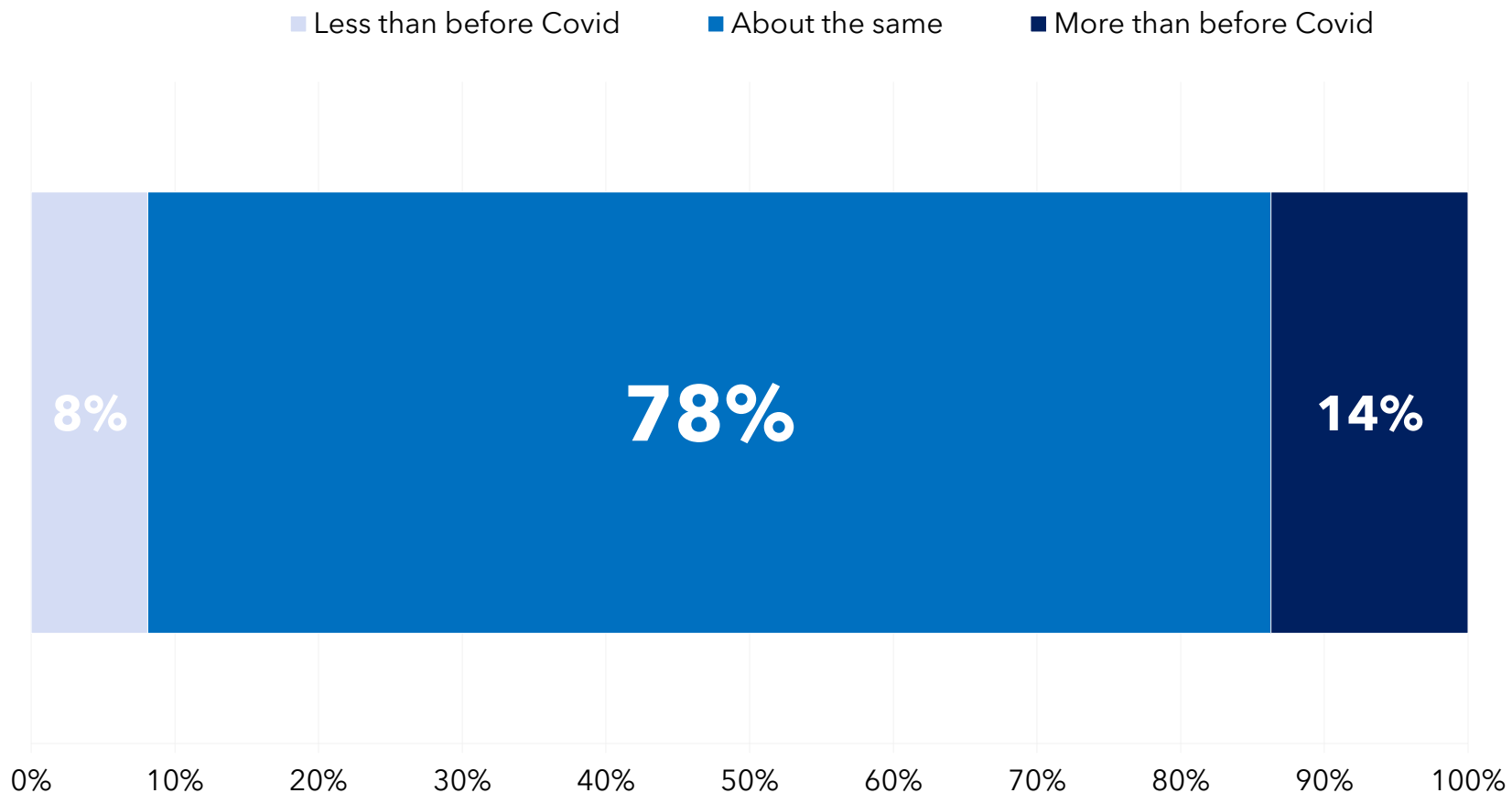


HOW OFTEN IN THE FUTURE?

- 87% of respondents intend to maintain or increase their pre-Covid levels of attendance
- Only 13% intends to attend less often

n = 4,930

How much do you think you will SPEND on attending cultural events in future?



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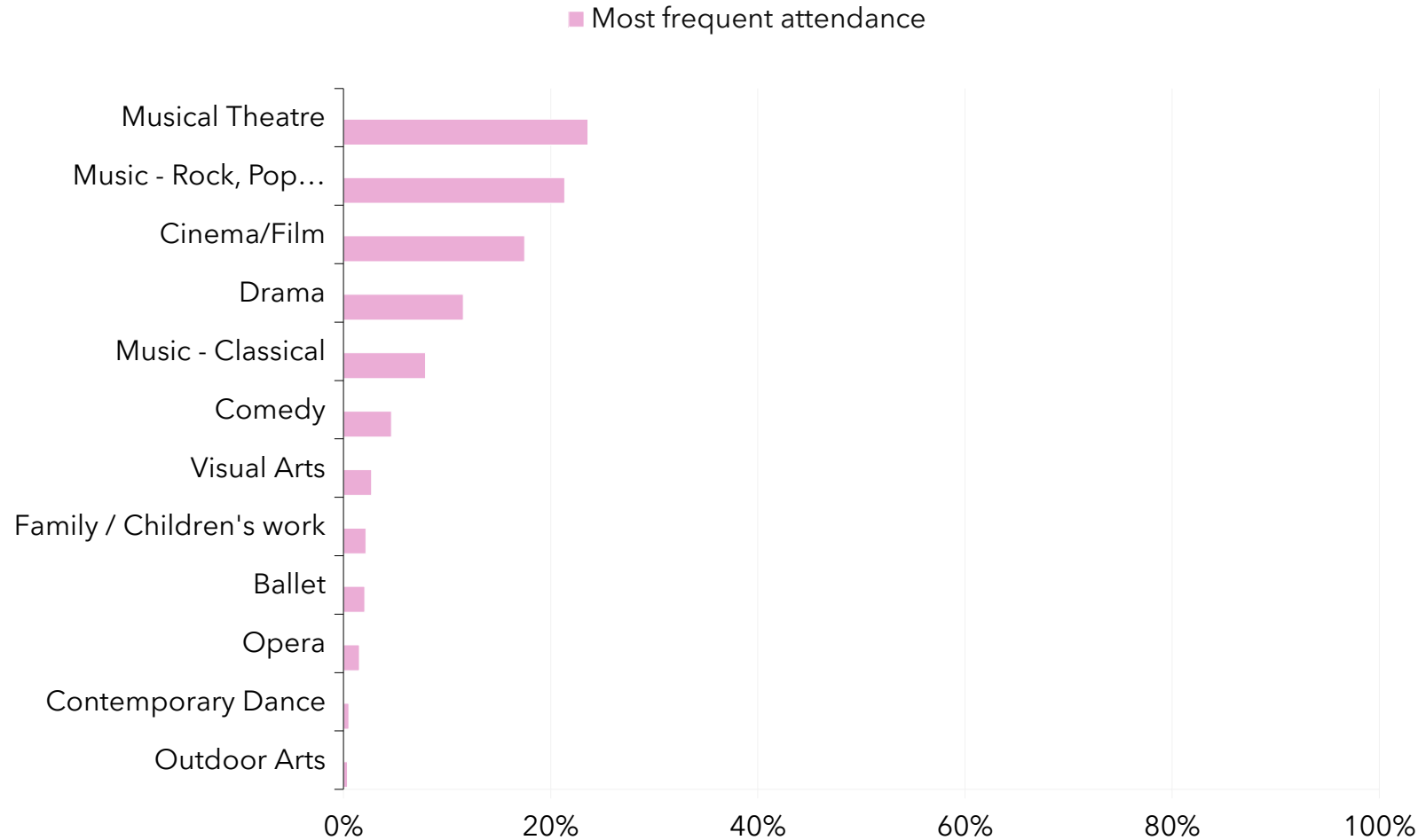


HOW MUCH IN THE FUTURE?

- 92% of respondents think they will spend the same or more on cultural events in future
- Only 8% think they will spend less

n = 4,913

If you had to choose one of the following as your MOST frequent attendance at cultural events and venues, which of the following would it be?



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WHAT EVENT?

- Musical Theatre is the most popular choice amongst respondents
- Followed by Music (Rock/Pop) and Cinema
- Outdoor Arts and Contemporary Dance are the least popular

n = 4,954

Attendance pre-Covid



ATTENDANCE

87% INTEND TO ATTEND ABOUT THE SAME OR MORE OFTEN THAN PRE-COVID

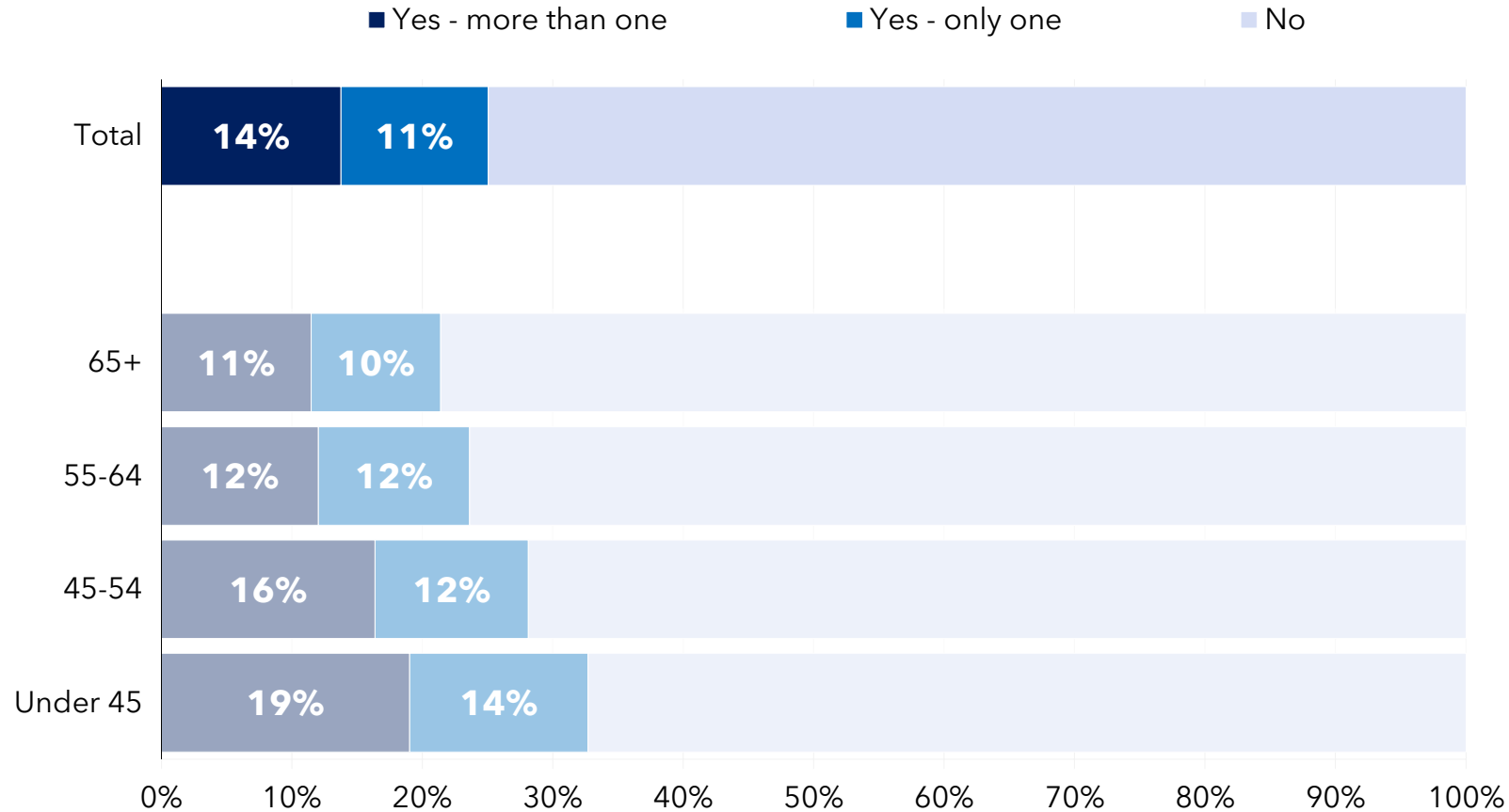


SPEND

92% INTEND TO SPEND ABOUT THE SAME OR MORE IN FUTURE

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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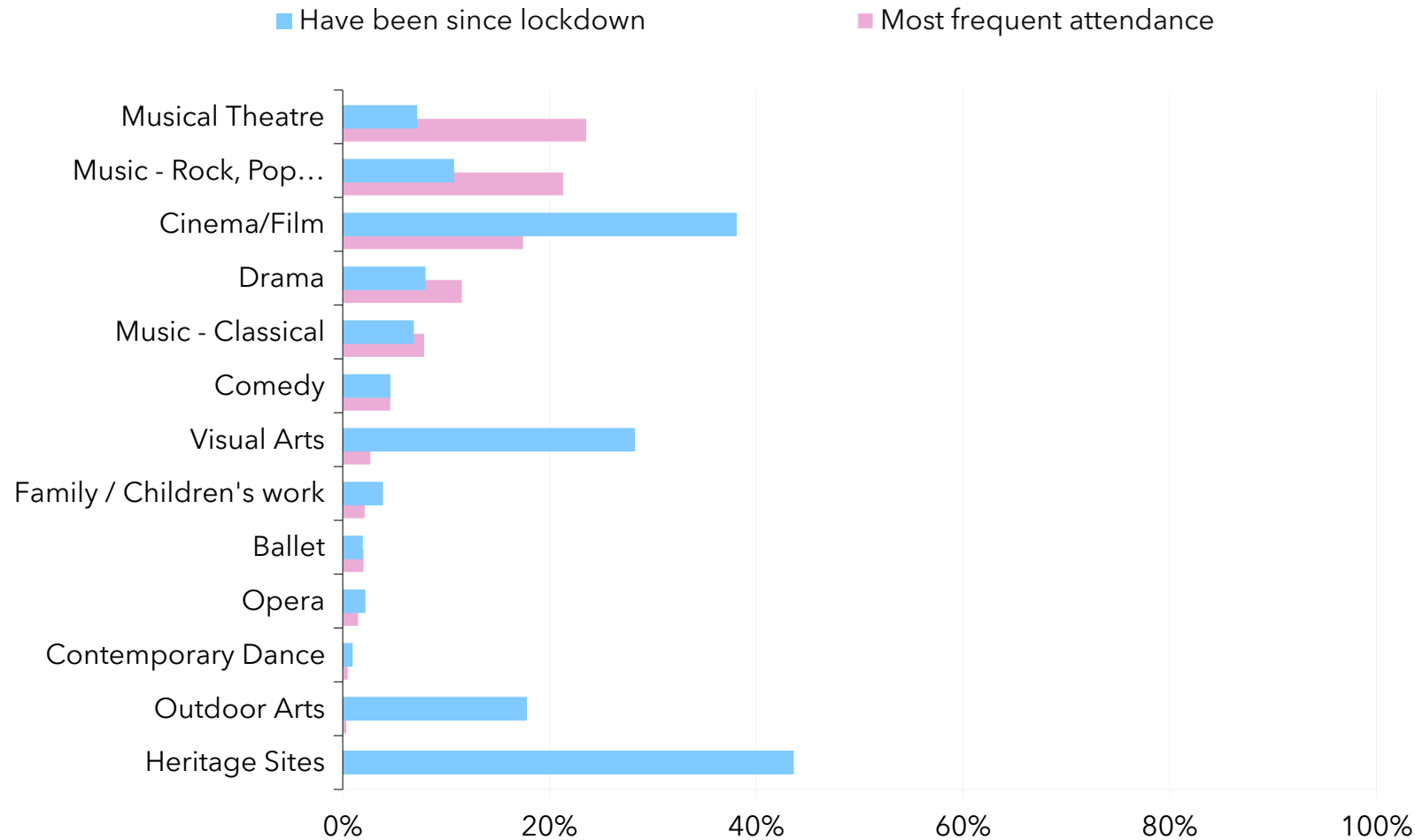


ATTENDANCE SINCE COVID

- 25% 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 65s are least likely

n = 4,945

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

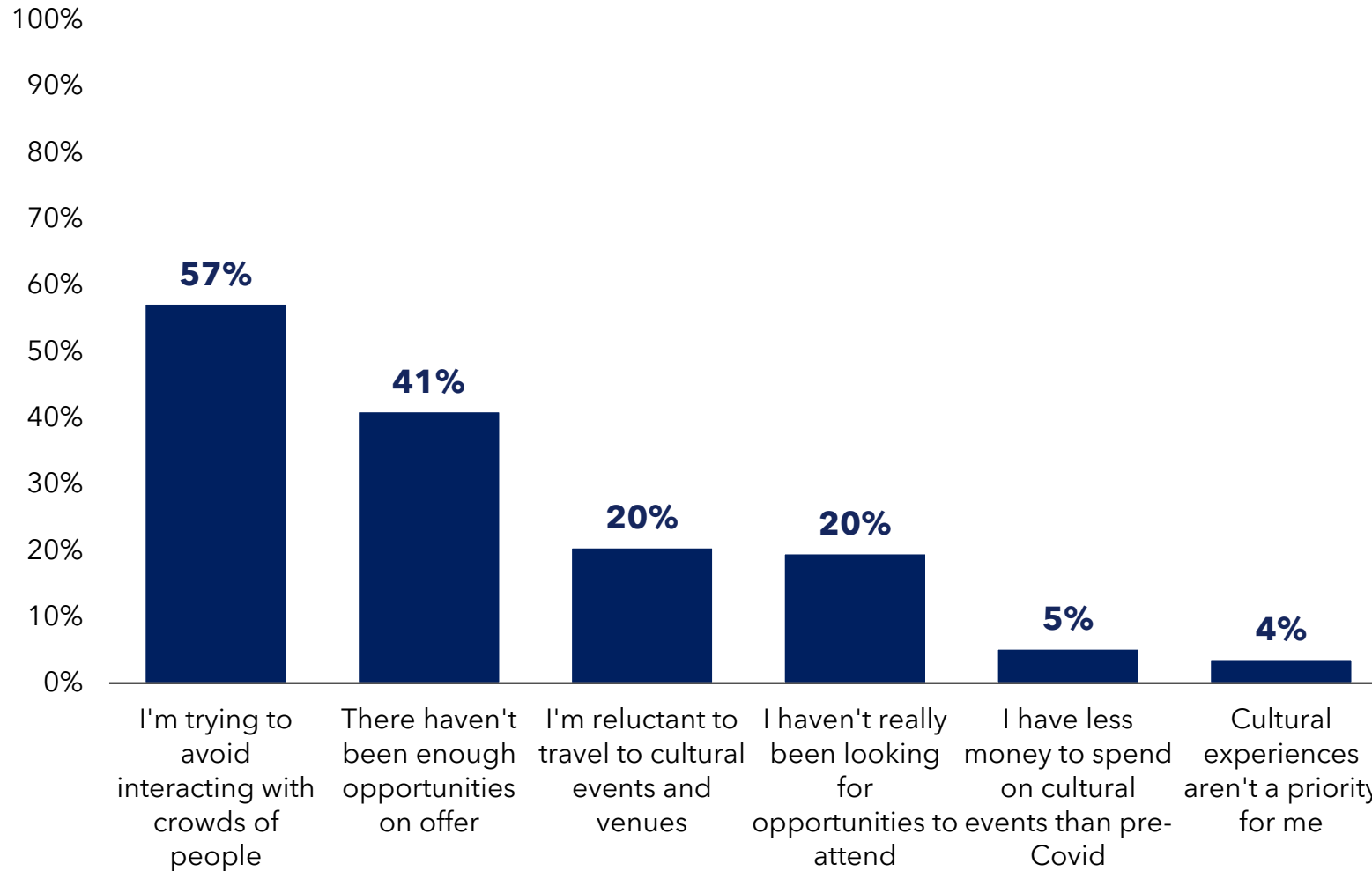


WHAT EVENT?

- There is wide variation between what respondents said to be their most attended cultural event and what they have since lockdown attended, probably due to availability

Most frequent attendance total n = 4,954
Have been since lockdown total n = 1,235

If not, why is that?

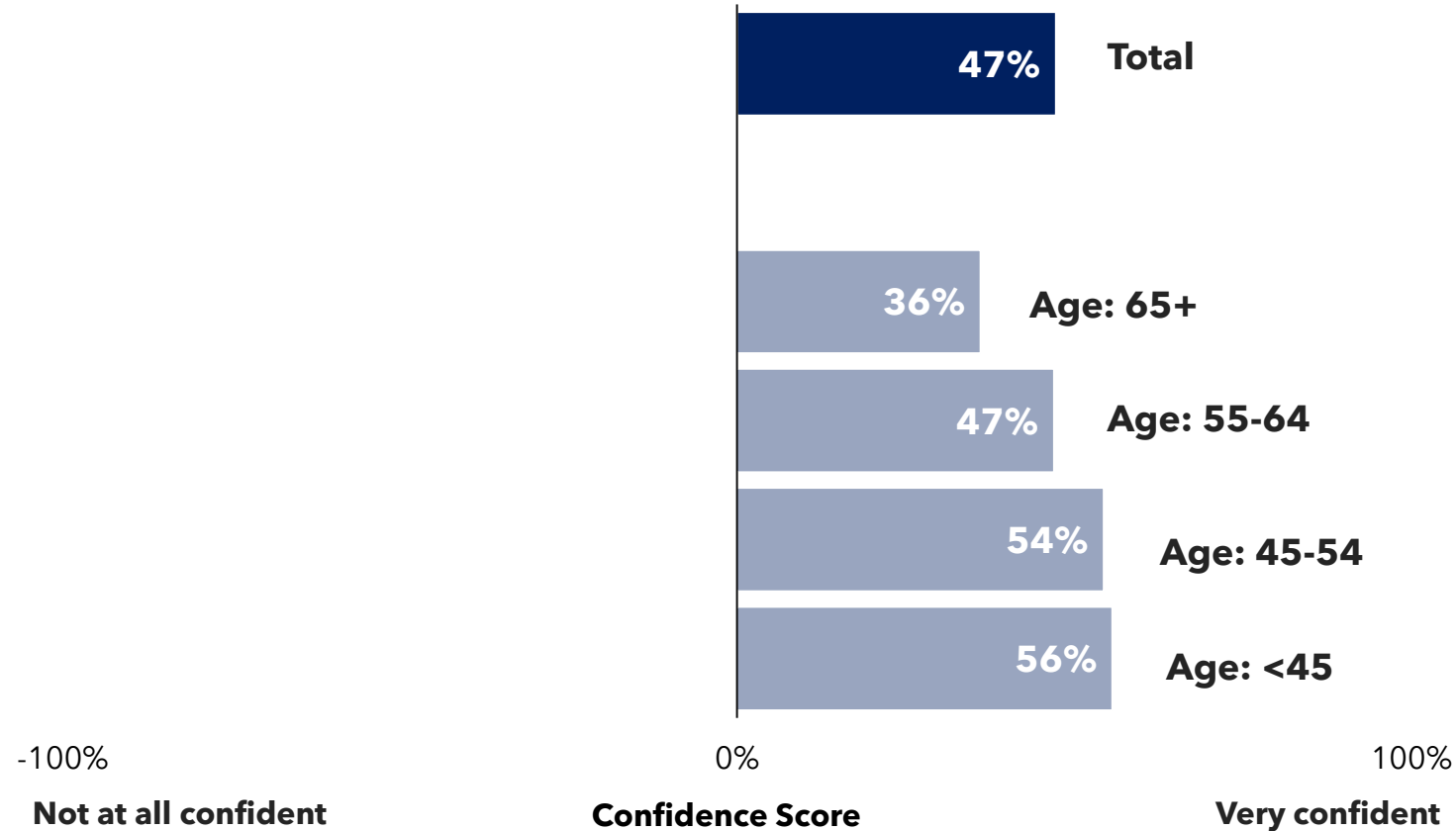


REASONS FOR NOT ATTENDING

- 57% of people said the reason for not attending is to avoid interacting with crowds of other people - this increases with age
- 41% said there were not enough opportunities on offer

n = 3,714

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



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CONFIDENCE

- For those who have attended, net confidence score is currently +47%
- Under 45s are more likely to feel confident than older age groups

n = 1,172

Attendance since Covid- 19



RETURNED

25% OF RESPONDENTS HAVE ATTENDED A CULTURAL EVENT SINCE RE-OPENING

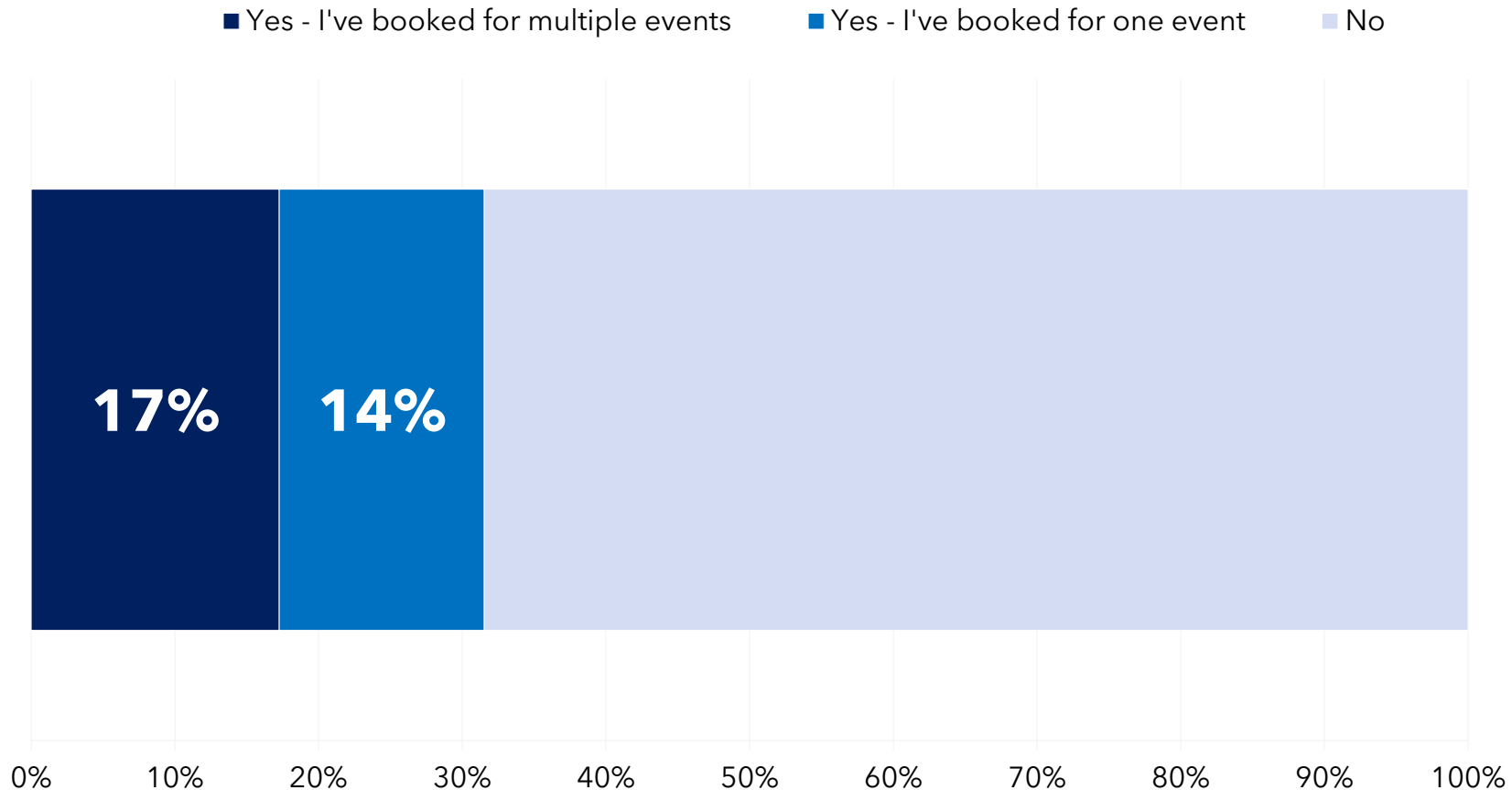


CONFIDENT

FOR THOSE WHO HAVE ATTENDED, THEY INDICATE A +46% CONFIDENCE SCORE

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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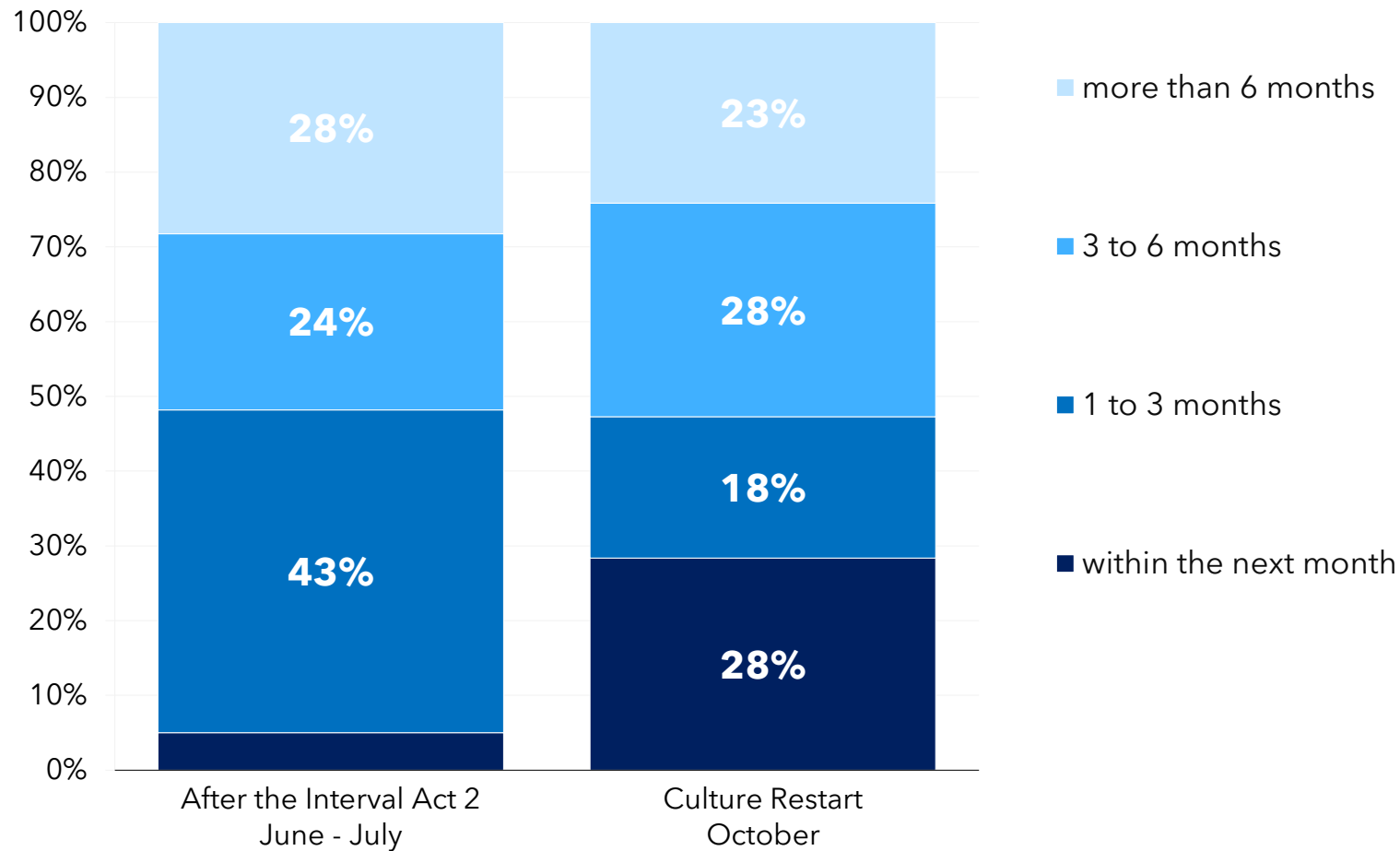


FUTURE EVENTS

- 31% 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 = 4,945

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

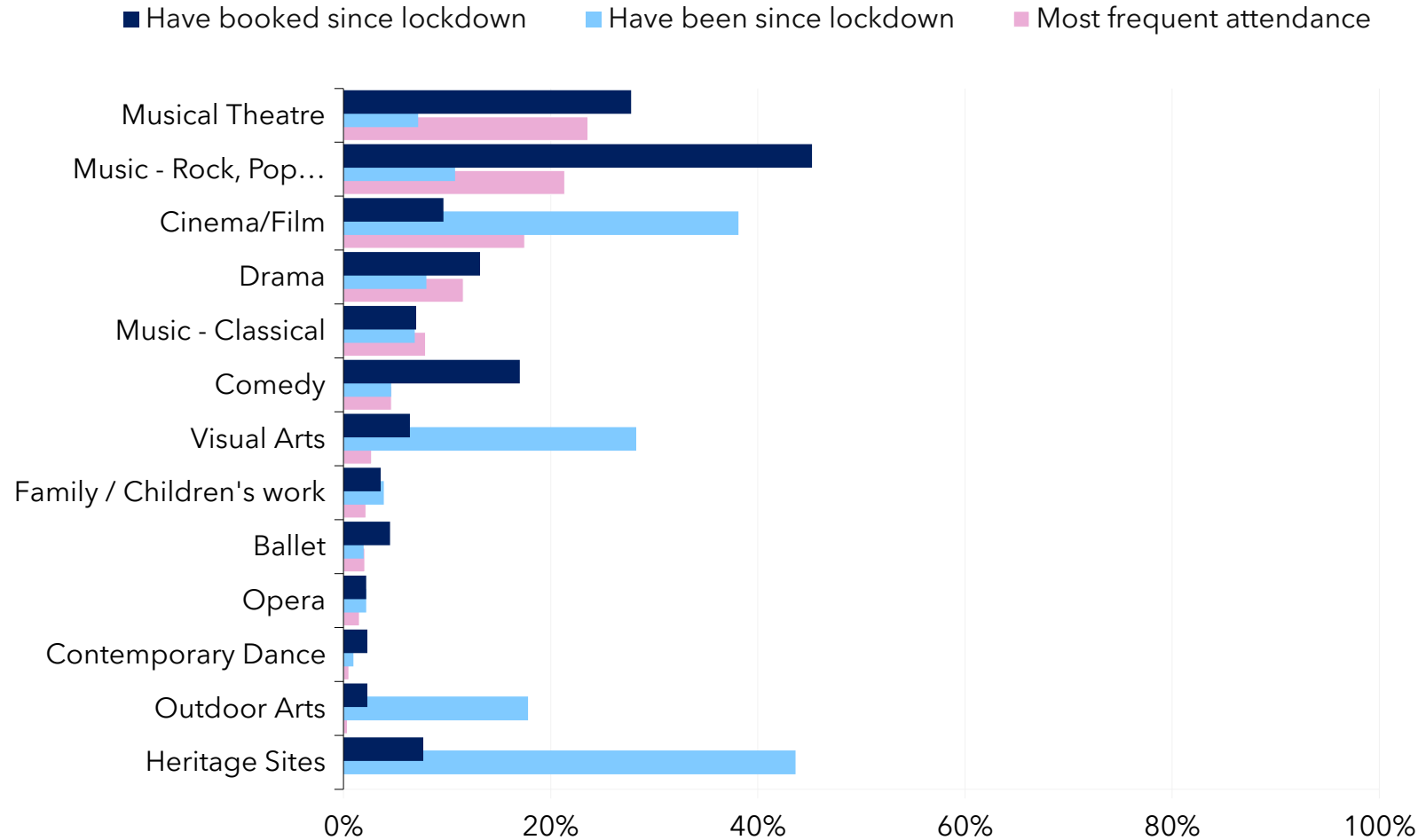


FUTURE EVENTS

- Of those who have booked a future event, 28% of them have booked their first event scheduled within the next month (November)
- 23% have booked their first event that is scheduled for more than 6 months away

n = 1,561

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

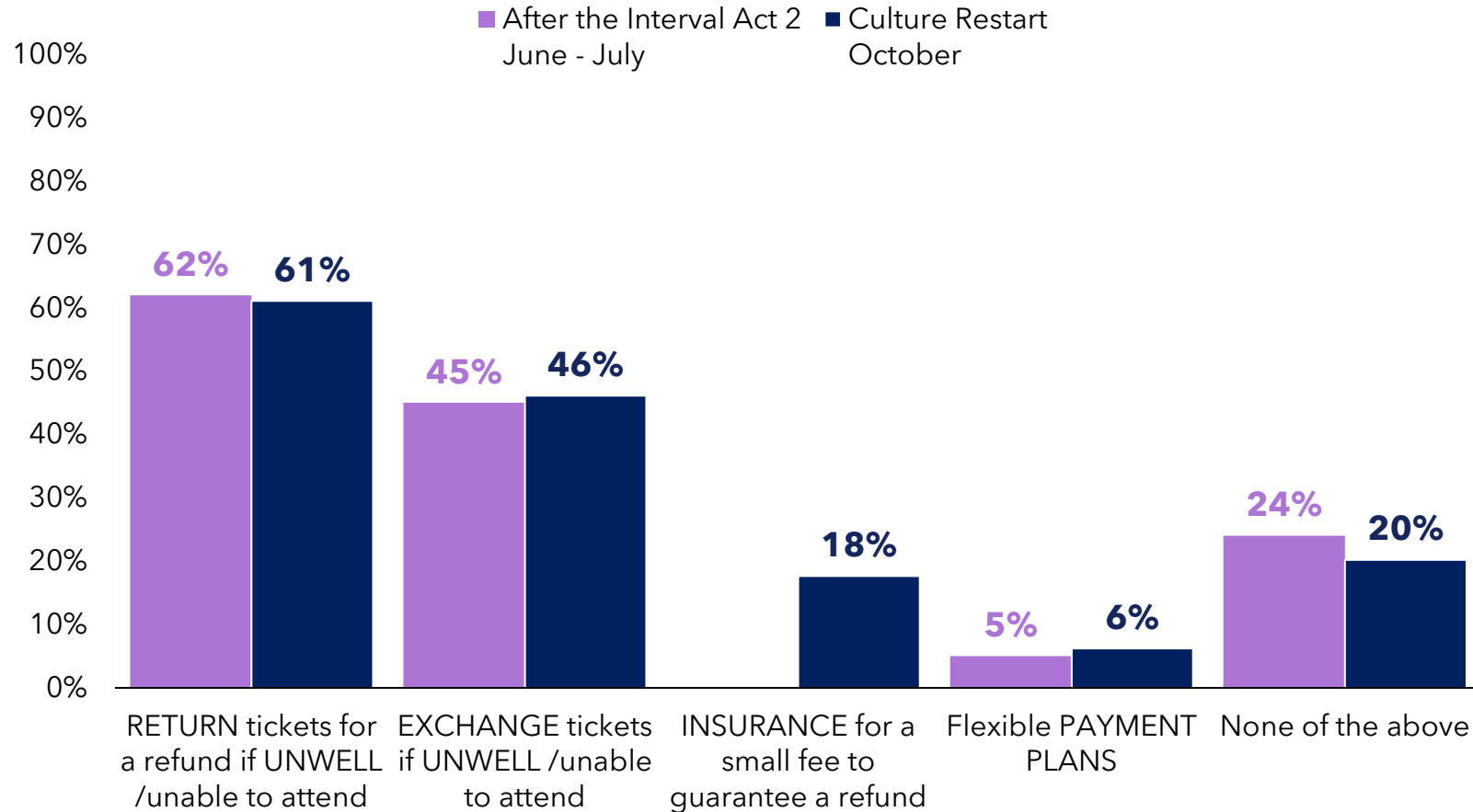


WHAT EVENT?

- What respondents have booked for in future is more in line with preferred artforms
- Although less likely to have booked for cinema, visual arts or heritage sites

Most frequent attendance total n = 4,954
 Have been since lockdown total n = 1,235
 Have booked since lockdown total n = 1,556

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



ASSURANCES

- 61% of respondents would be more likely to book for future events if they had the ability to return tickets if unable to attend
- Exchanging tickets made 40% of respondents more likely to book
- 20% indicated that none of these options would make them more likely to book

n = 4,930

Bookings for future events



BOOKING AHEAD

31% OF RESPONDENTS HAVE BOOKED EVENTS SINCE MARCH THAT THEY HAVEN'T YET ATTENDED

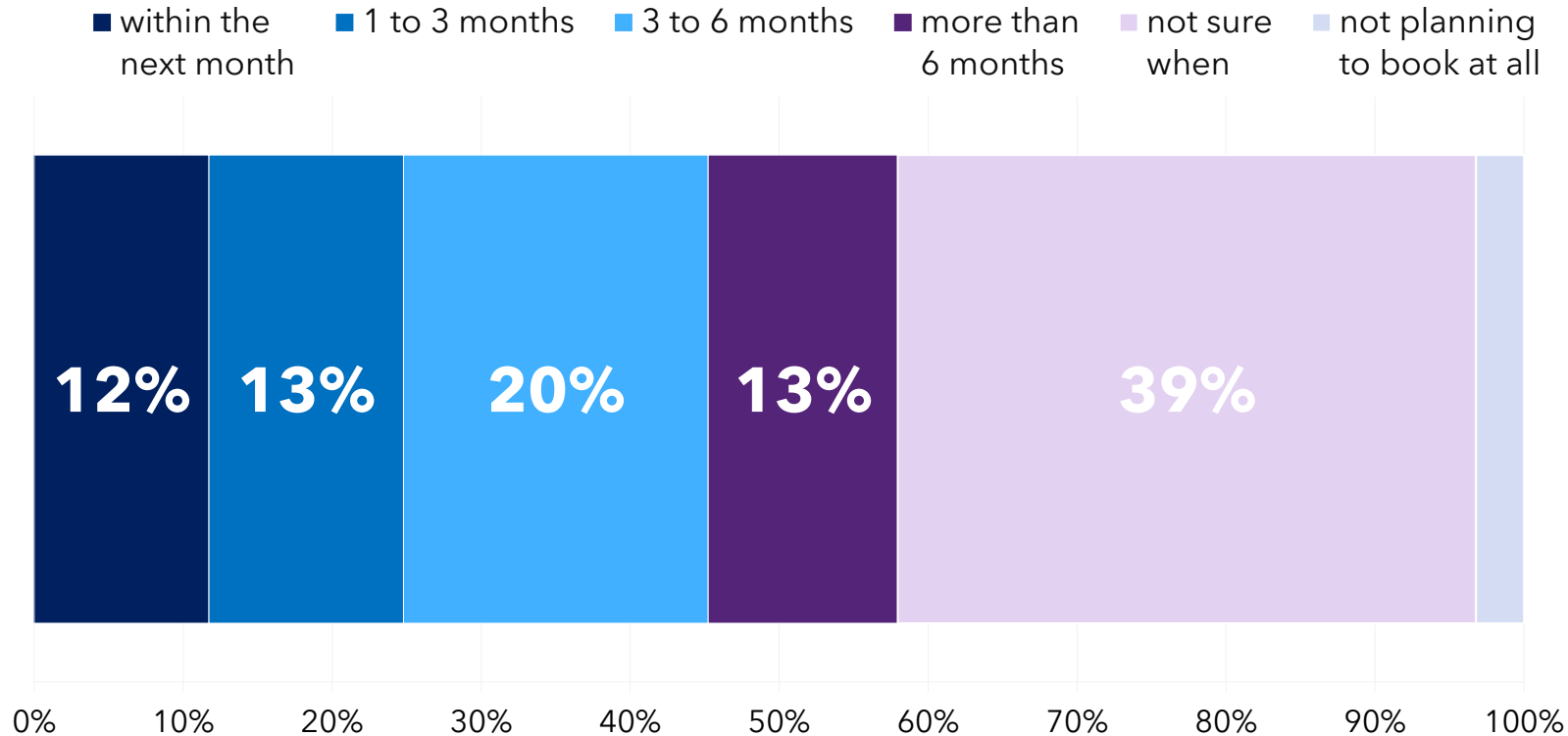


TICKET RETURNS

61% OF RESPONDENTS WOULD BE MORE LIKELY TO BOOK FOR FUTURE EVENTS IF THEY HAD THE ABILITY TO RETURN TICKETS IF UNABLE TO ATTEND

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?

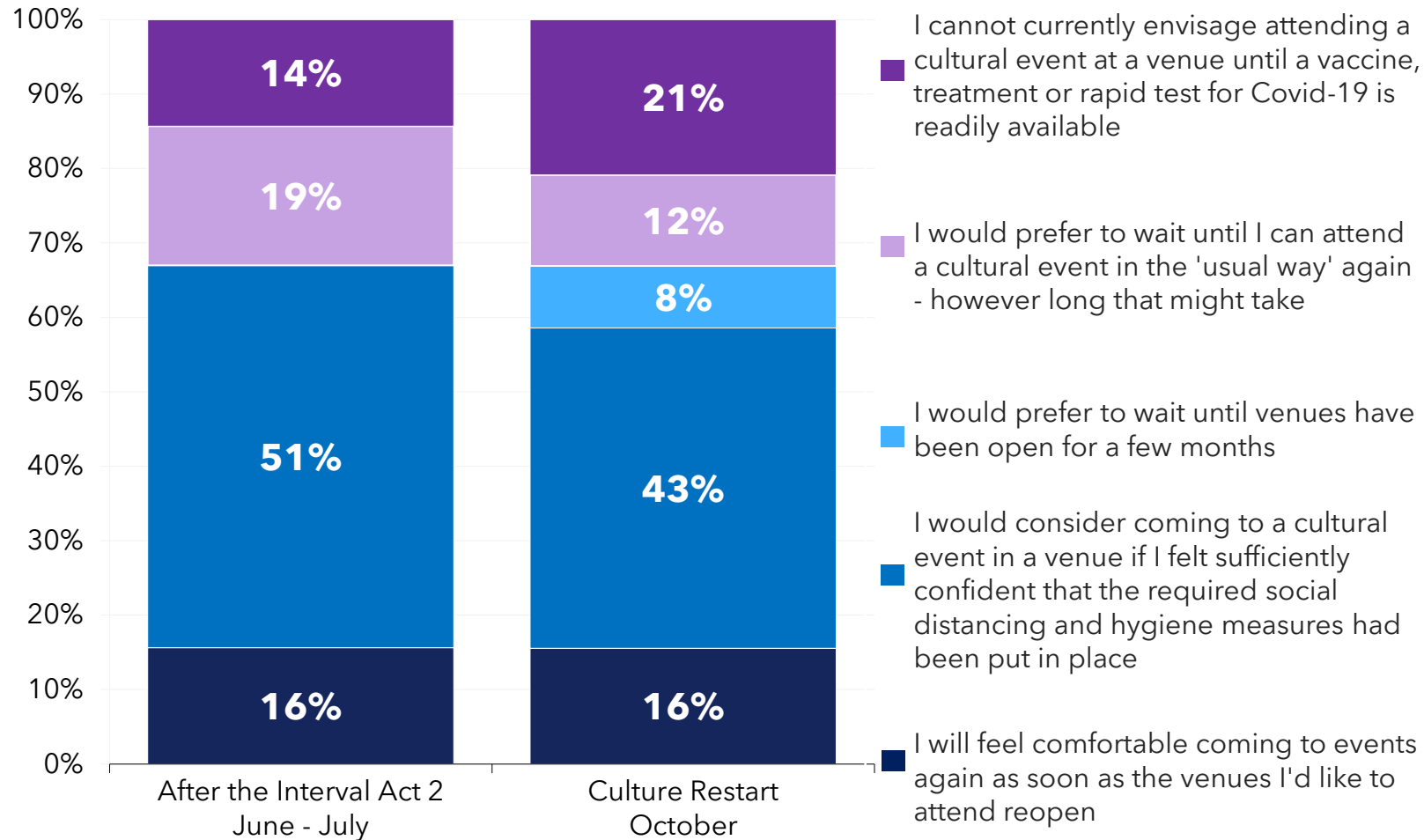


READY TO BOOK

- Only 12% of respondents are ready to start booking again within the next month
- 39% of those who haven't already booked are not sure when they will be ready to book again

n = 3,388

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

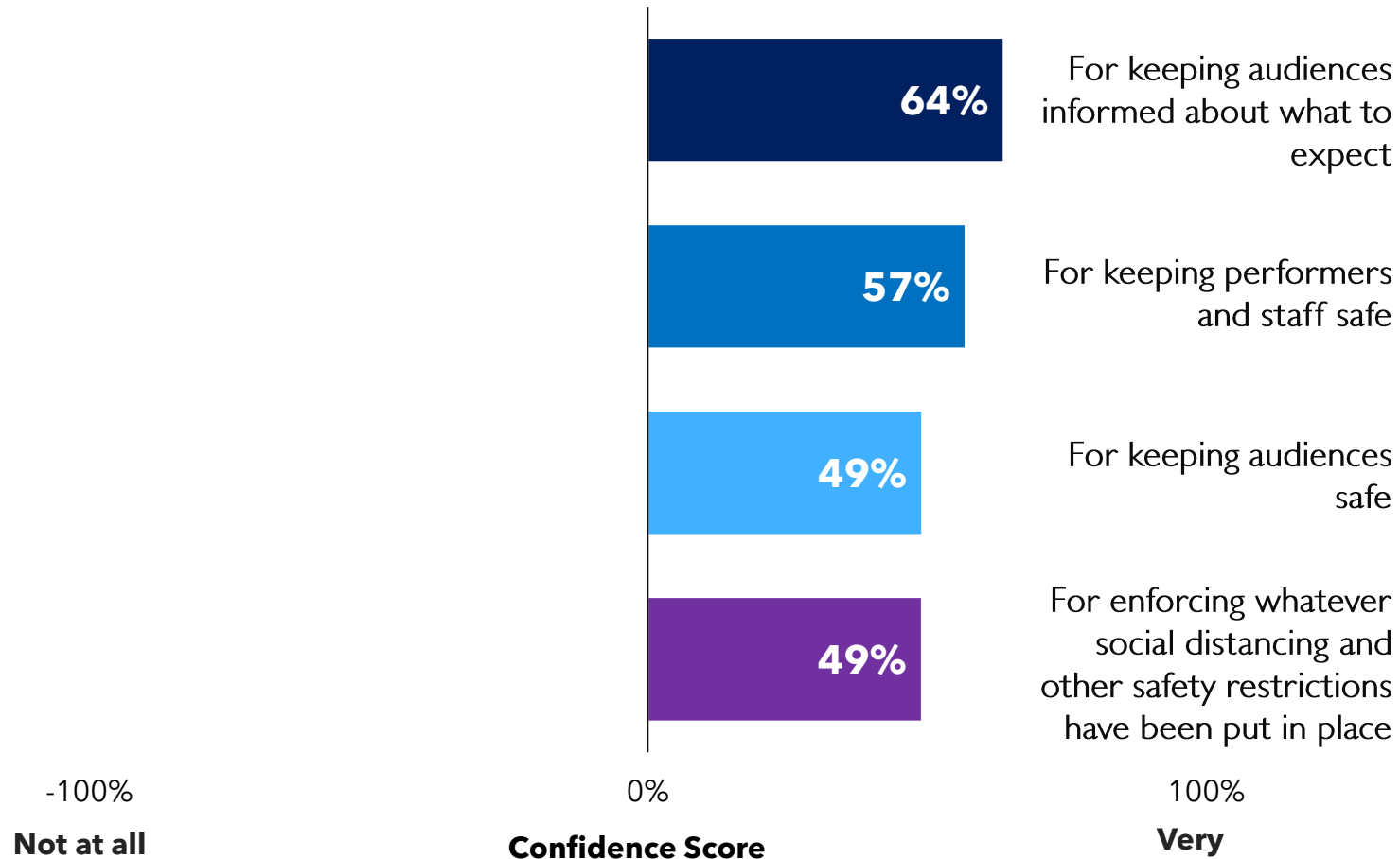


RETURNING TO EVENTS

- Only 16% are comfortable returning as soon as venues they like are able to re-open
- The proportion who are waiting for a vaccine or treatment before attending has increased from 14% in July to 21% in October

n = 3,388

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

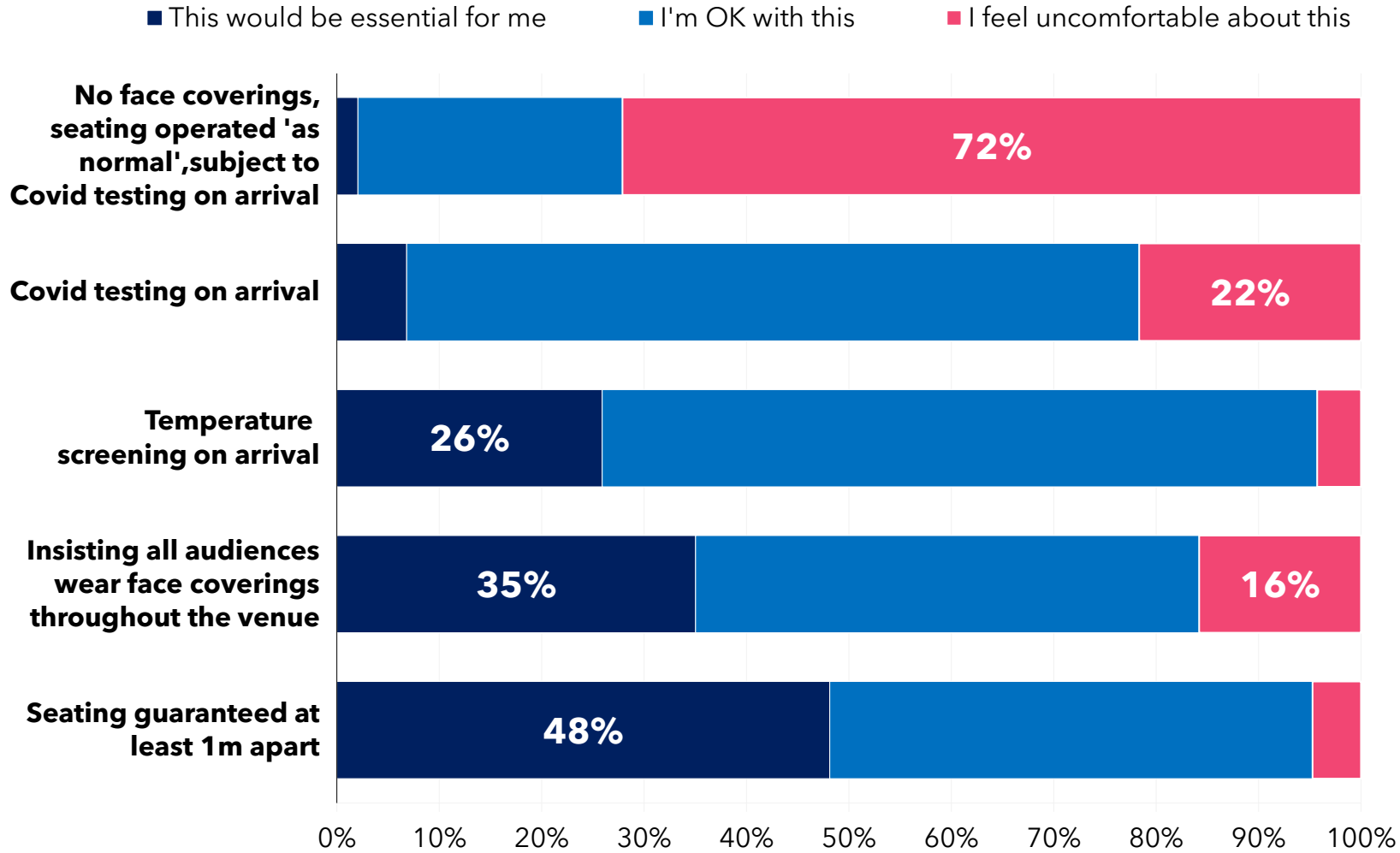


SAFETY MEASURES

- Audiences are most confident that venues will keep them informed about what to expect
- They are less confident that venues will keep them safe and enforce social distancing and other safety measures

n = 4,930

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



SAFETY MEASURES

- 72% of respondents would feel uncomfortable about no face coverings and no social distancing subject to Covid testing on arrival
- Other measures are either OK or essential, in particular ensuring seating is at least 1m apart

n = 4,930

Attitudes to attending cultural events again



NOT READY

ONLY 12% OF RESPONDENTS ARE READY TO START BOOKING AGAIN WITHIN THE NEXT MONTH AND 39% ARE JUST NOT SURE WHEN

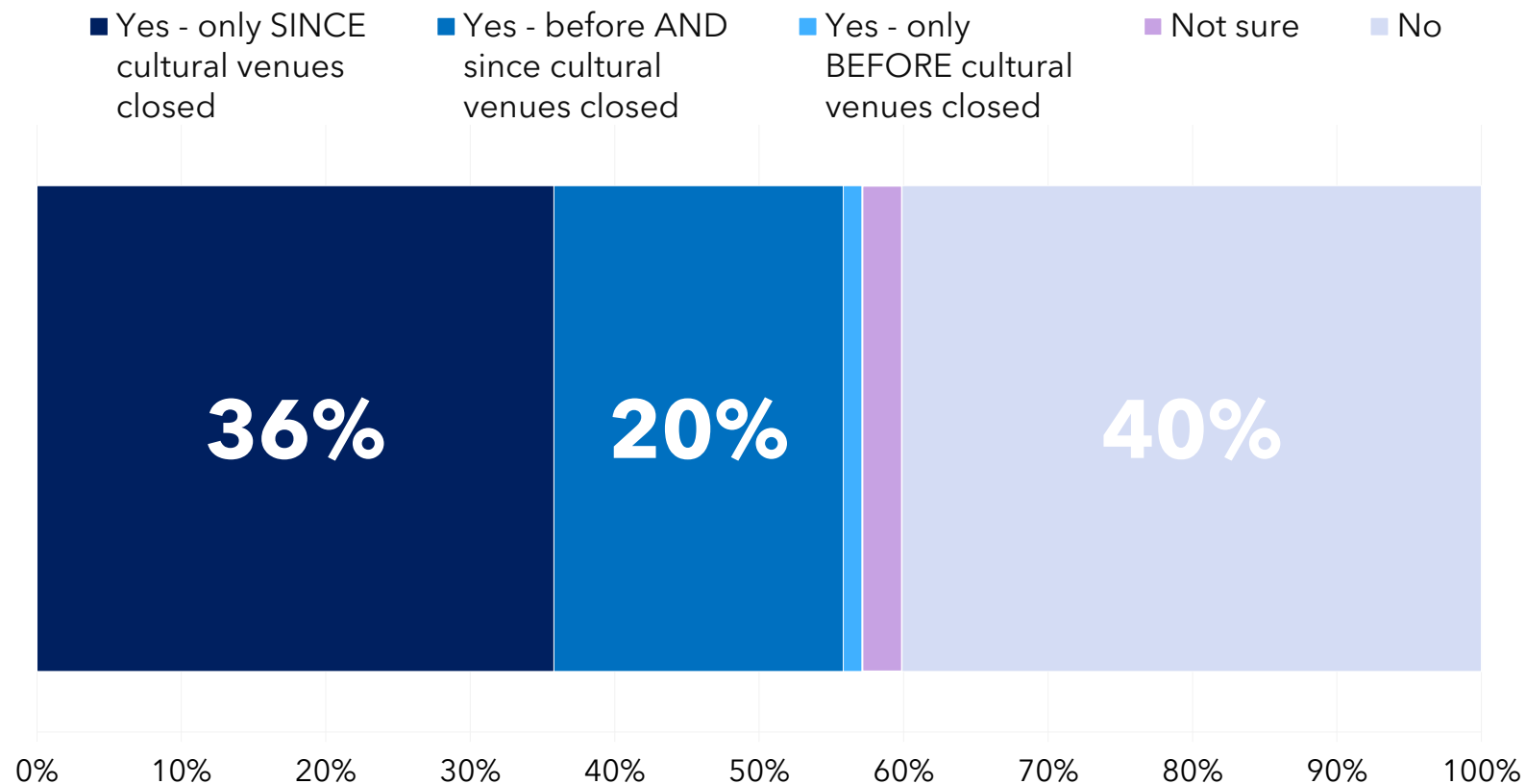


SAFETY FIRST

72% WOULD FEEL UNCOMFORTABLE ABOUT NO FACE COVERINGS AND NO SOCIAL DISTANCING

Current digital engagement with culture

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



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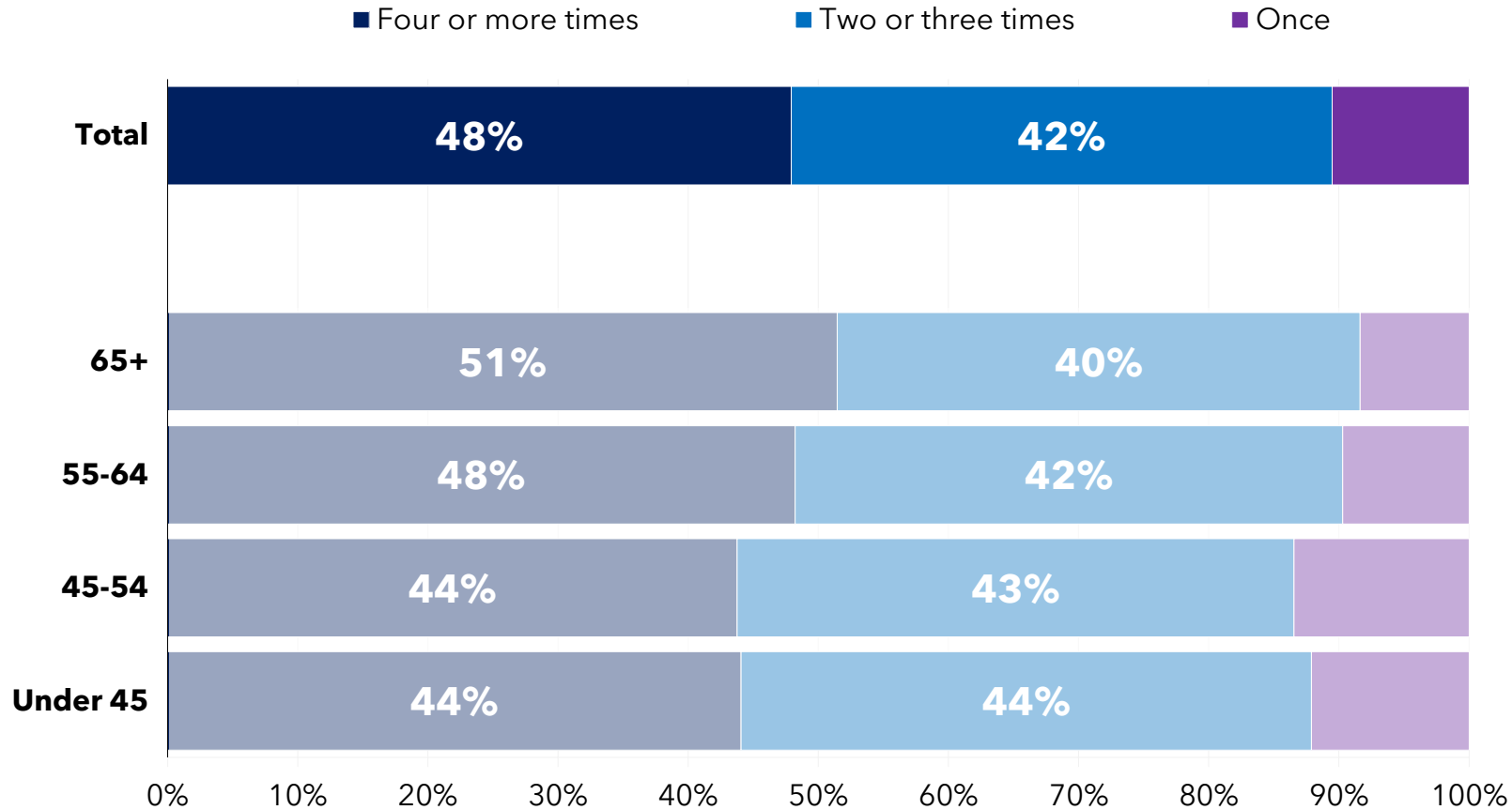


DIGITAL ENGAGEMENT

- 56% of respondents have engaged with culture online since venues closed in March 2020
- Most of which had only started engaging online since lockdown

n = 4,945

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

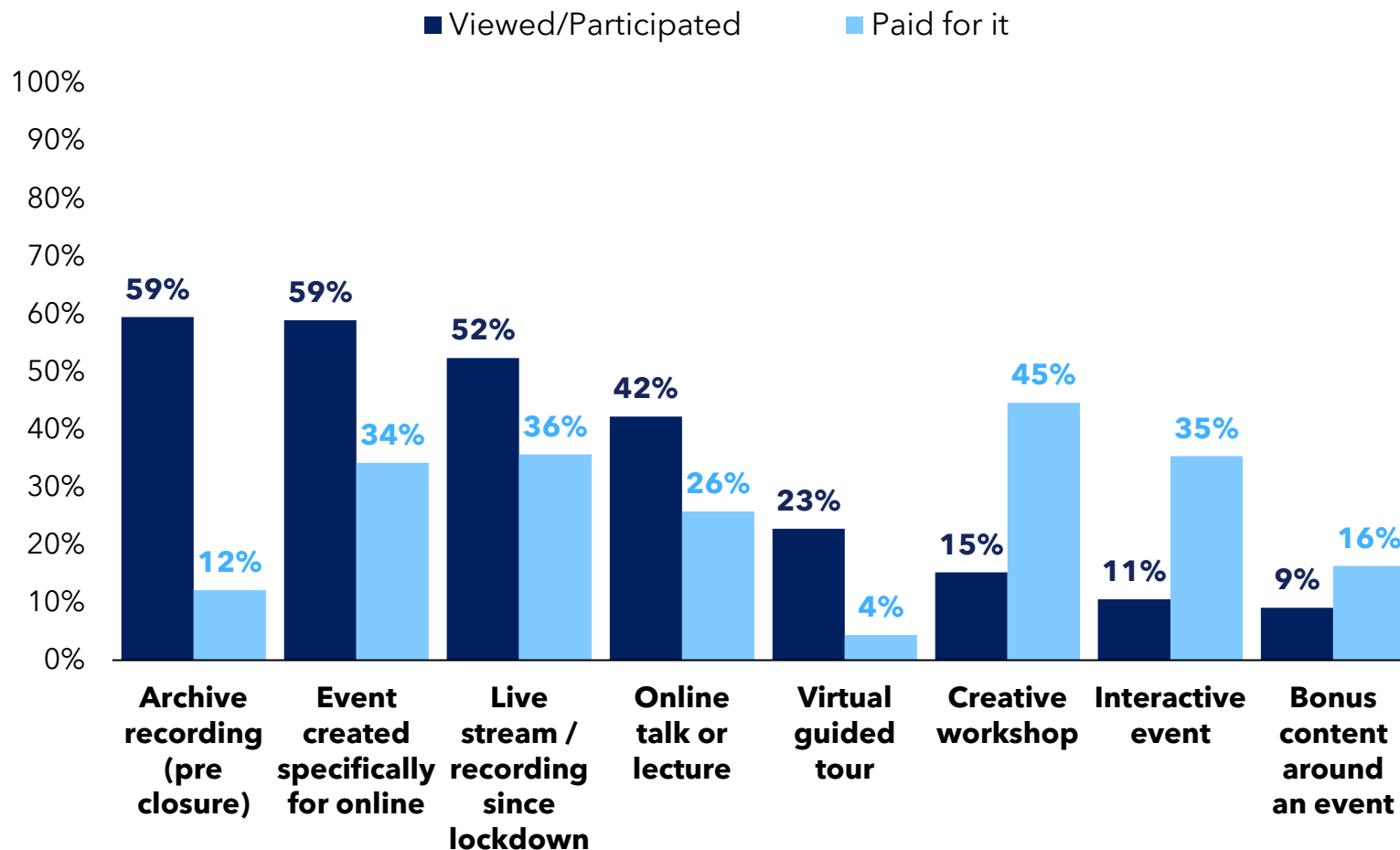


FREQUENCY OF DIGITAL ENGAGEMENT

- Of those who have engaged since venues closed, 48% have done so four or more times
- Only a minority 10% have only engaged once online

n = 2,832

Which of the following types of online activity have you viewed or participated in for pleasure since cultural venues closed?



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TYPE OF DIGITAL ENGAGEMENT

- Archive recordings and online specific events are the most common forms of digital engagement
- But people are more likely to pay for creative workshops and interactive events

Paid vs Free Responses n = 1,659

Online Activity Type Responses n = 2,819

Current digital engagement with culture



ENGAGED

56% HAVE ENGAGED WITH CULTURE ONLINE SINCE LOCKDOWN AND 48% HAVE DONE SO 4+ TIMES

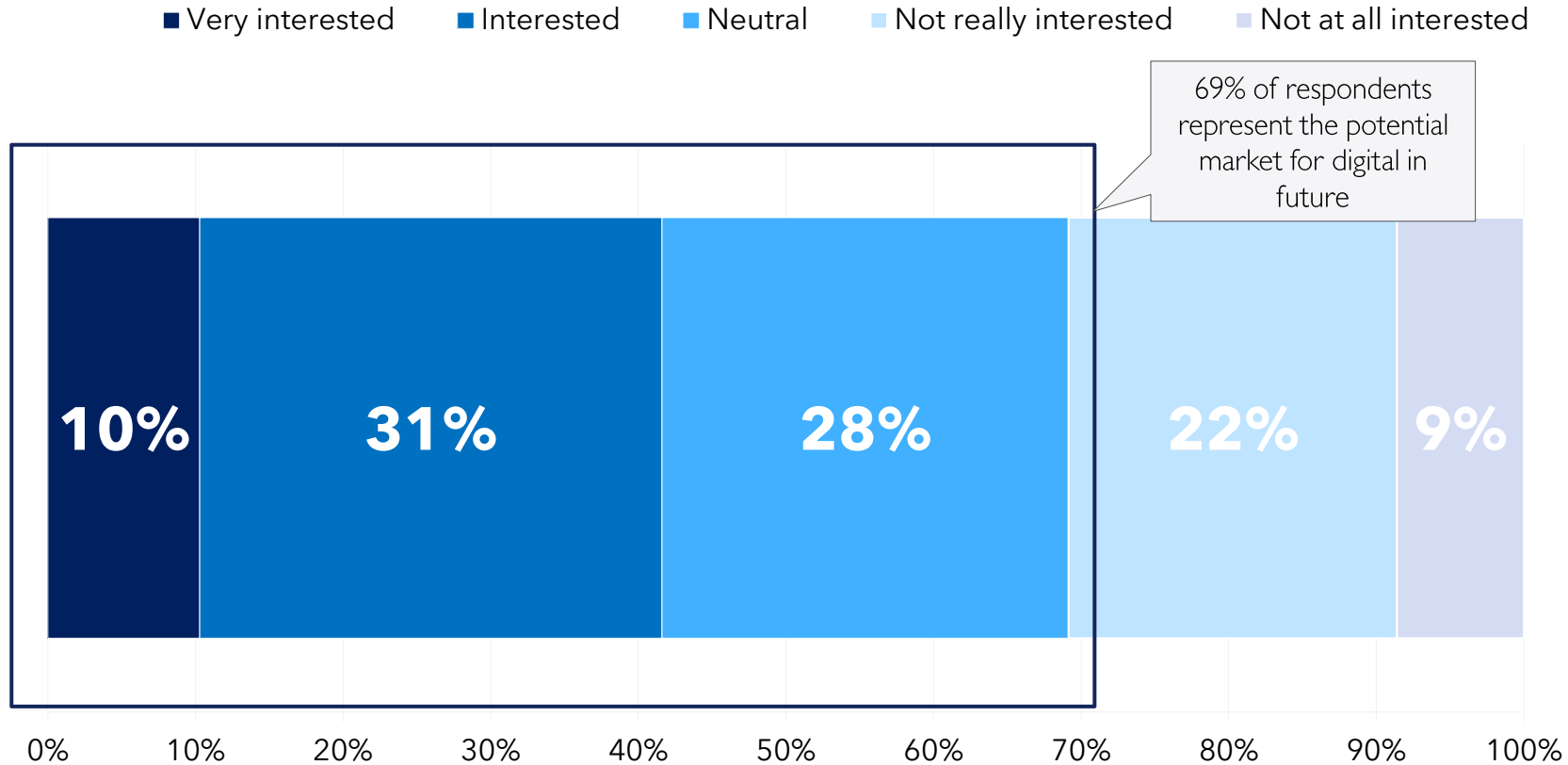


TYPE OF DIGITAL

ARCHIVE RECORDINGS AND ONLINE SPECIFIC EVENTS ARE THE MOST COMMON FORMS OF DIGITAL ENGAGEMENT - BUT NOT THE MOST PAID FOR

Interest in digital culture in future

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

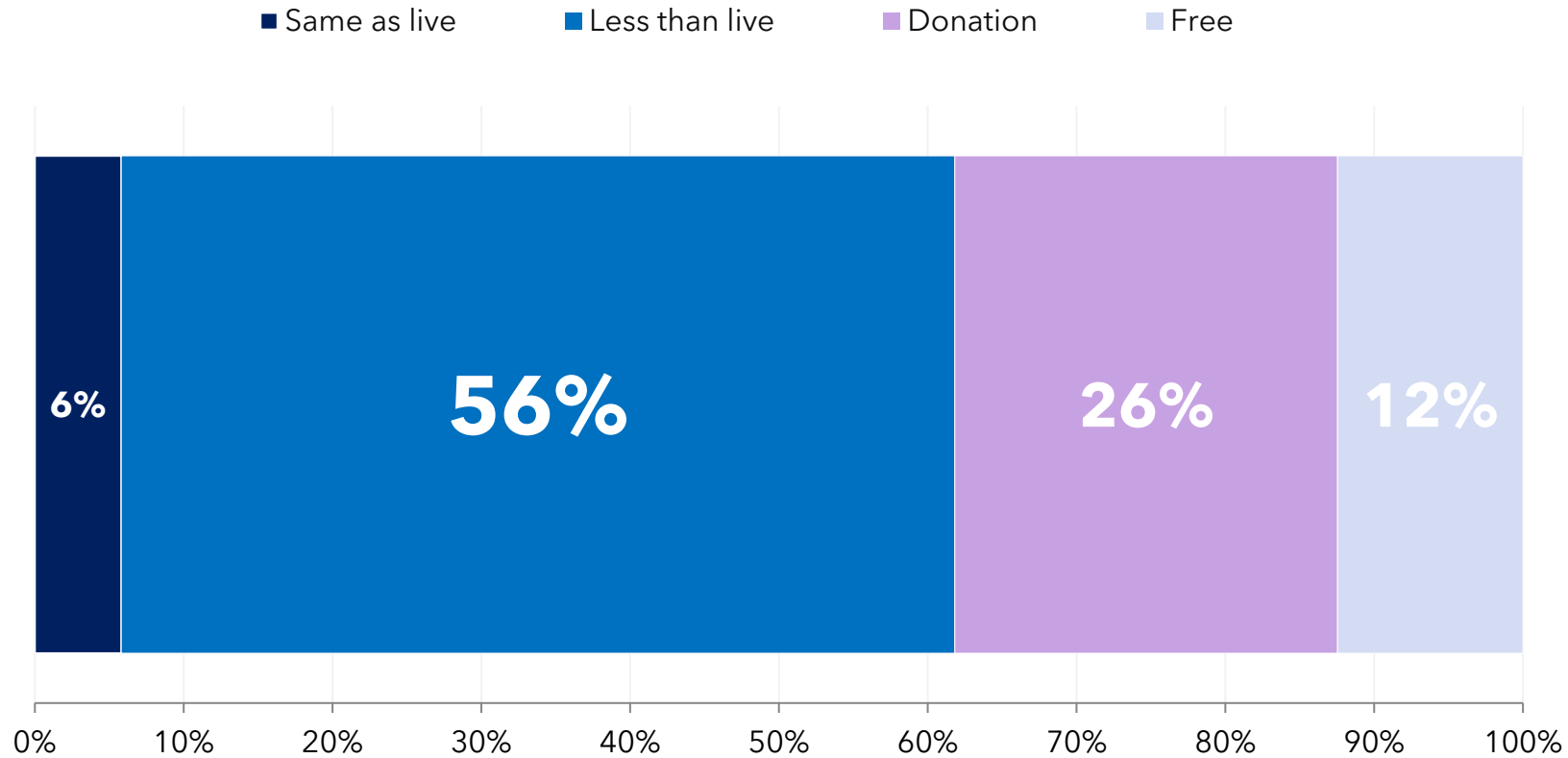


INTEREST IN DIGITAL IN FUTURE

- 41% of respondents are interested or very interested in engaging with digital content in future
- 31% were not really or not at all interested

n = 4,945

How much would you expect to pay for digital experiences?



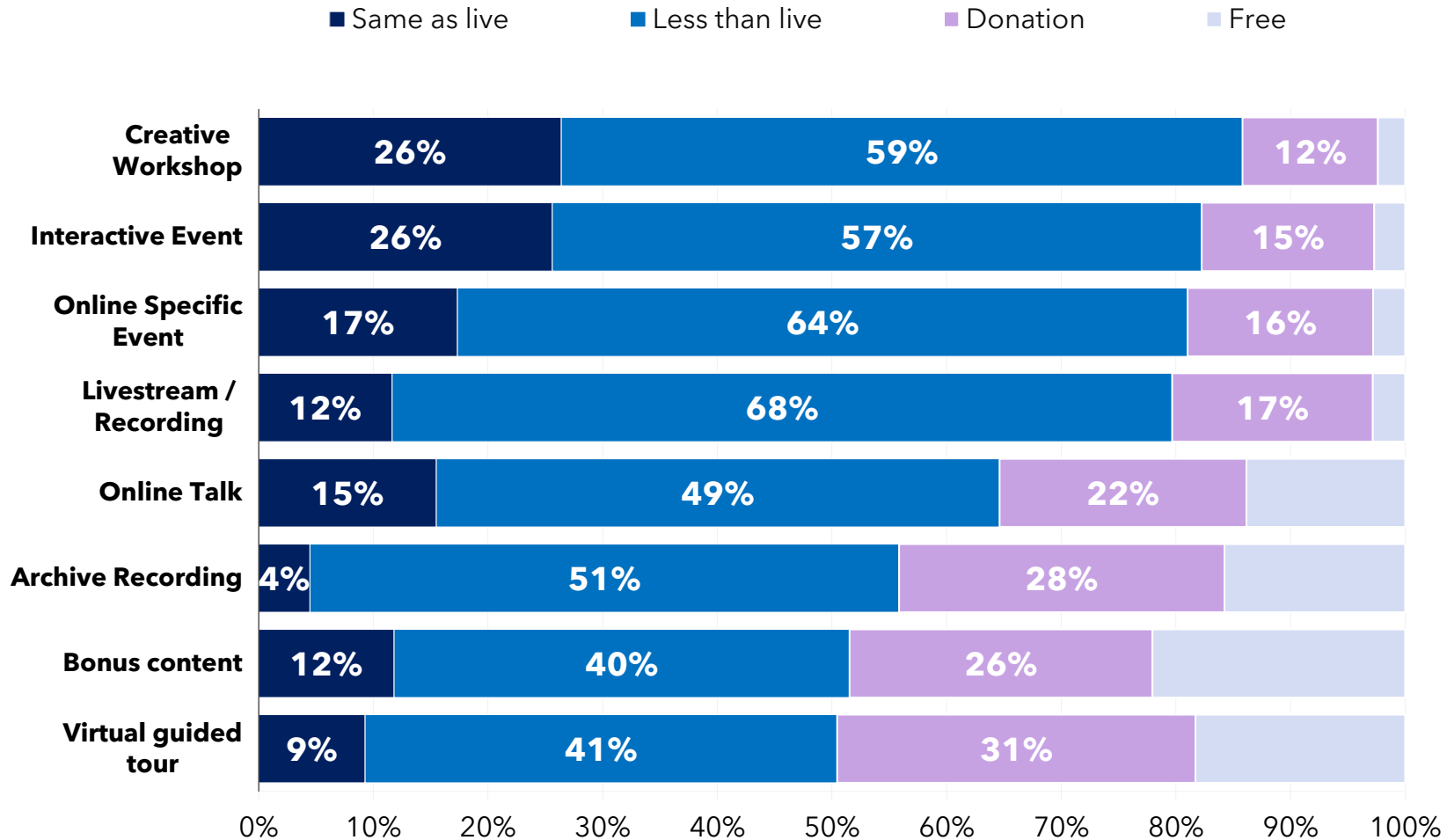
PAYING FOR DIGITAL EVENTS

- For those interested or neutral about digital events 62% would be willing to pay
- A small minority would be willing to pay as much as live
- Only 12% expect it to be free

n = 3,137

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

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

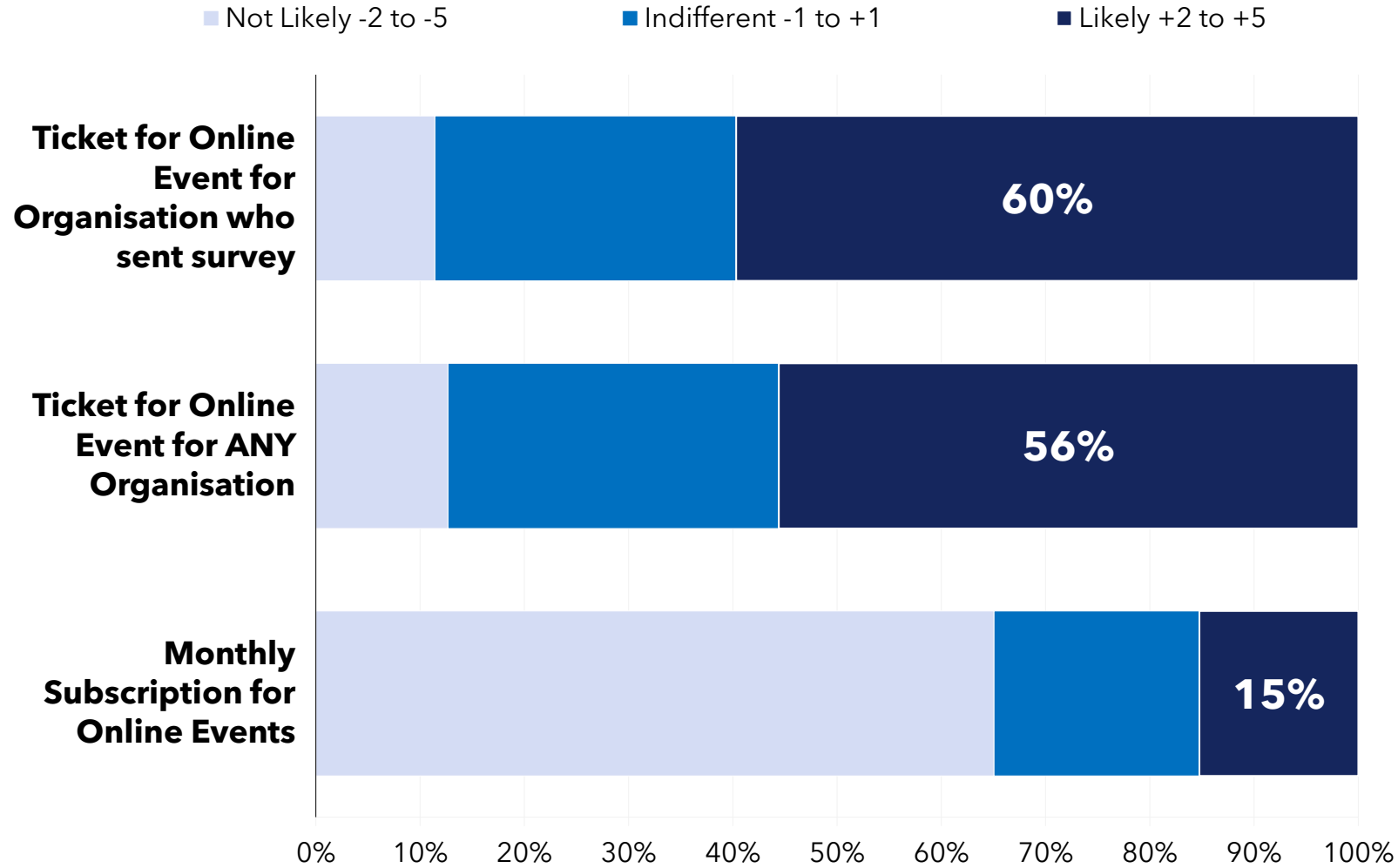


PAYING FOR DIGITAL EVENTS

- 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 = 3,214

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



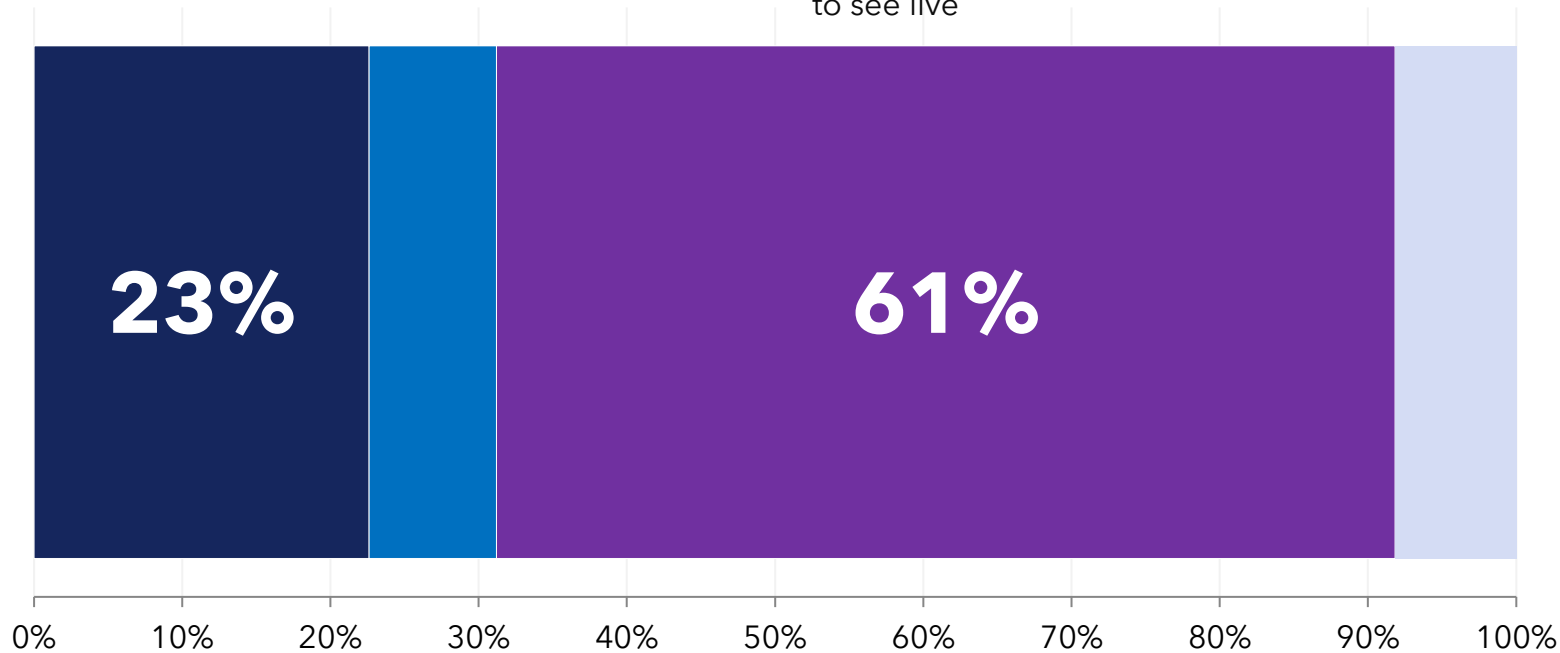
TICKETS FOR DIGITAL EVENTS

- 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 = 2,952

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 also engage with and pay for events online
- I'd also engage with culture online, but only for free content
- 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 probably not engage with online events and/or activities at all

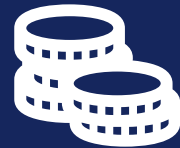


DIGITAL CULTURE VS IN PERSON ATTENDANCE

- 23% of respondents would continue to pay for digital events in future
- 61% say they are less likely to engage, but would still consider it for events they might not be able to see otherwise

n = 3,242

Interest in digital culture in future



DIGITAL TICKETS

62% OF RESPONDENTS WOULD BE WILLING TO PAY FOR DIGITAL EVENTS, MORE SO FOR ONLINE SPECIFIC CONTENT AND LIVESTREAMS



DIGITAL IN FUTURE

23% OF RESPONDENTS WOULD CONTINUE TO BUY TICKETS FOR DIGITAL IN FUTURE AND 61% WOULD STILL CONSIDER IT FOR EVENTS THEY COULD NOT SEE LIVE

Today's Key Takeaways

Key Takeaways: Returning to Live Events

As we predicted in *After the Interval*, Audiences are **keen to return**
- in similar proportions

Where audiences have returned they feel **confident and safe** with the safety measures cultural organisations have implemented

Following **customer sentiment** over what is simply 'allowed' is essential
(eg. Socially distanced seating; operation 'moonshot')

Key Takeaways: Audiences for Digital

There is likely to be a strong, **ongoing appetite for digital** content

Organisations should think about how to **balance their programmes of digital activity**

Online culture isn't just for younger people. Older people and vulnerable groups are engaging in large numbers

Key Takeaways: Paying for Digital

There is significant appetite among respondents for paying for digital content, especially if **digital offers something unique** as distinct from live

The same **principles of price differentiation** used for live remain important for digital to ensure you appeal to a range of what people are willing to pay

Free is a bad anchor, undermining value and future income generation

Are you
signed up?

A LARGER DATA SET ENABLES:

- EVER-MORE NATIONALLY REPRESENTATIVE
- GRANULAR SEGMENTATION

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the data

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COMMENTS

Q&A