



CULTURE  
**RESTART**

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## **Culture Restart** Audience Tracker

Wave 8

May 2021

INSIGHTS  
**ALLIANCE**

*indigo*

BAKER**RICHARDS**

**One Further**

*supporting cultural recovery*

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# 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



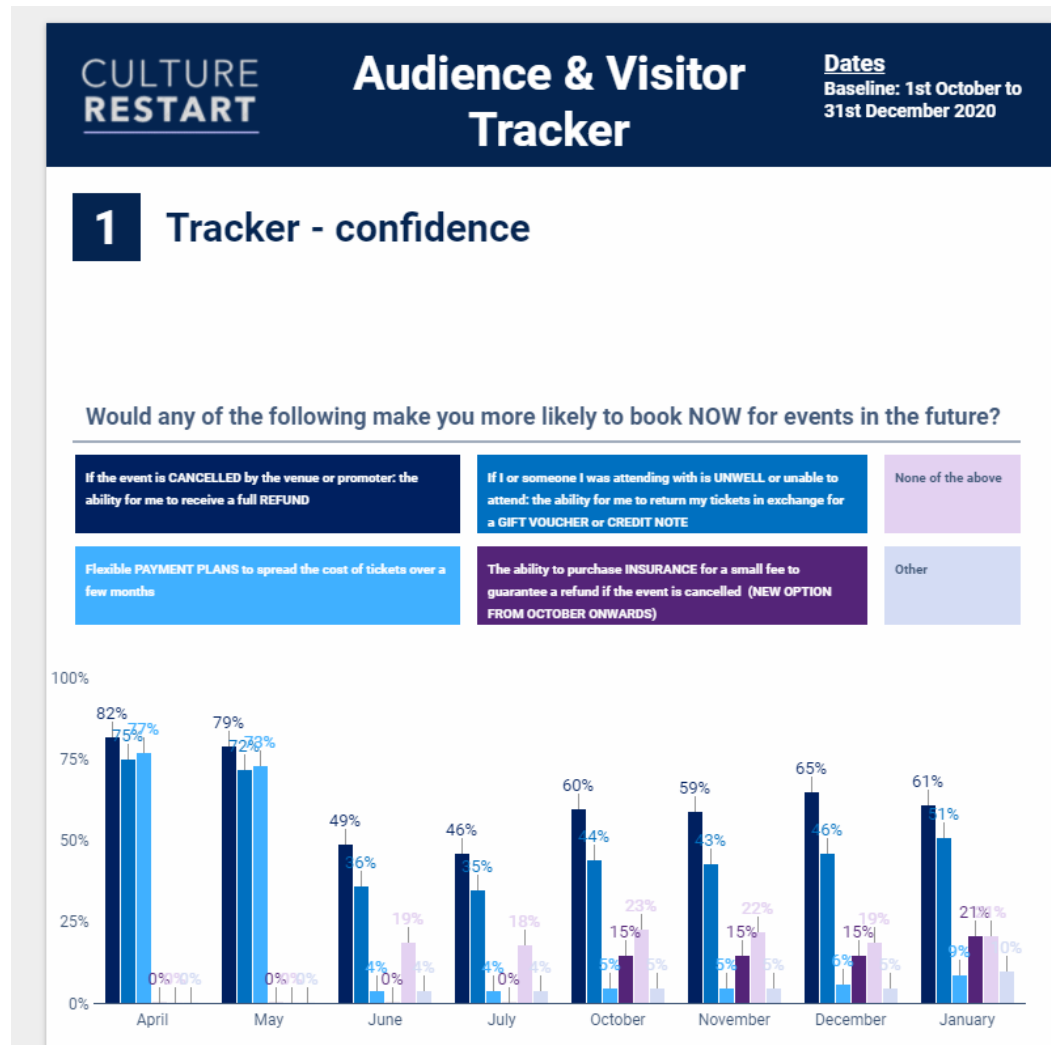
Assess the appeal of **digital** content and willingness to pay for it, both before and after reopening

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\*\*](#)

# Tracker Survey Overview



RESPONSES

**56,849**



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

WAVE 7: APR 2021, 7,550

WAVE 8: MAY 2021, 7,170



PARTICIPATING ORGANISATIONS

**85**

# Respondent profile



AGE  
38% OVER 65  
48% 45 TO 64  
14% UNDER 45



LOCATION  
80% ENGLAND  
14% SCOTLAND  
5% WALES  
1% N. IRELAND



FINANCES  
19% HAVE LOST INCOME

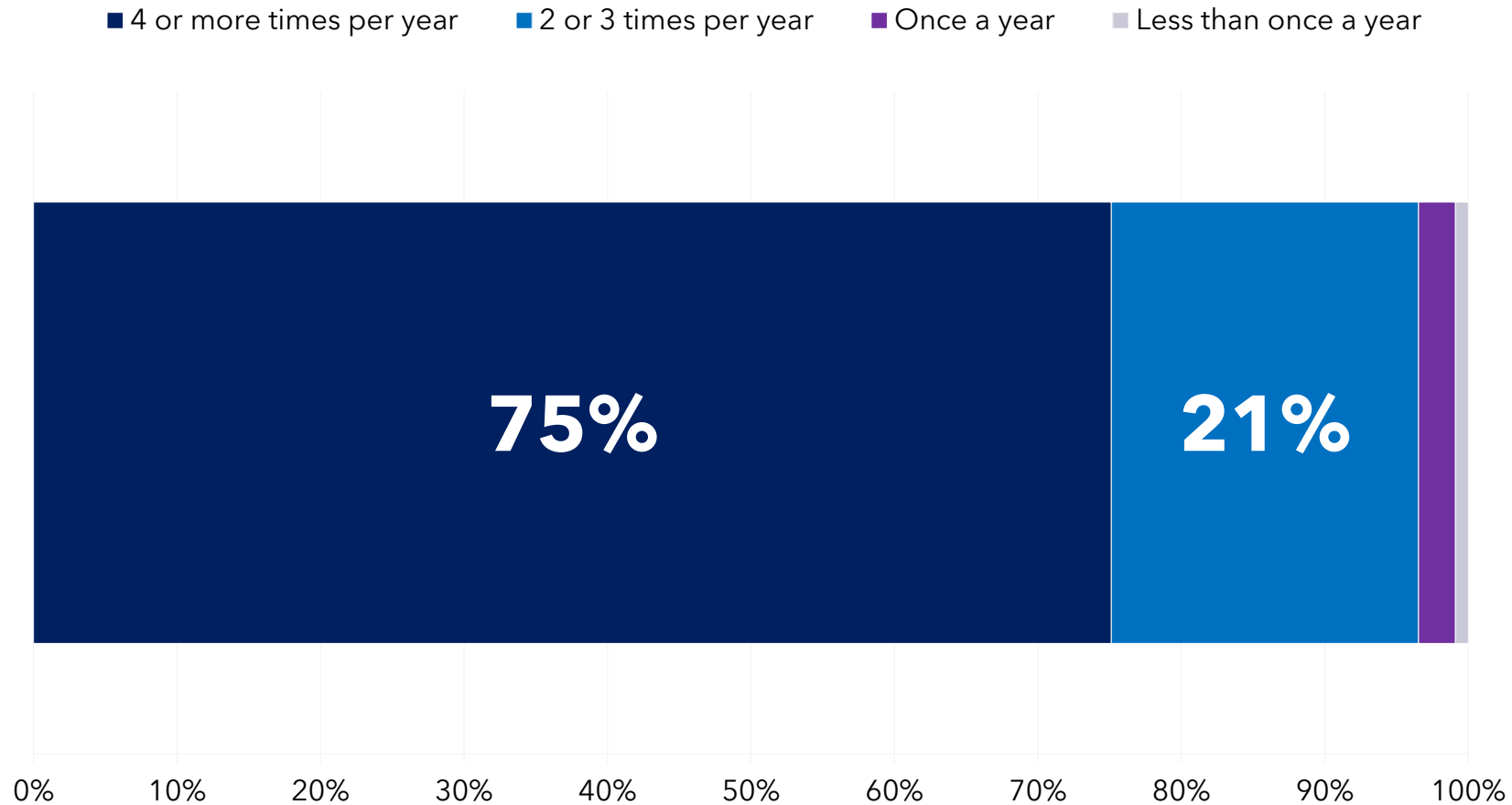


VULNERABLE  
24% CLASSED AS VULNERABLE



D/deaf OR DISABLED  
14% IDENTIFY AS D/deaf OR DISABLED

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



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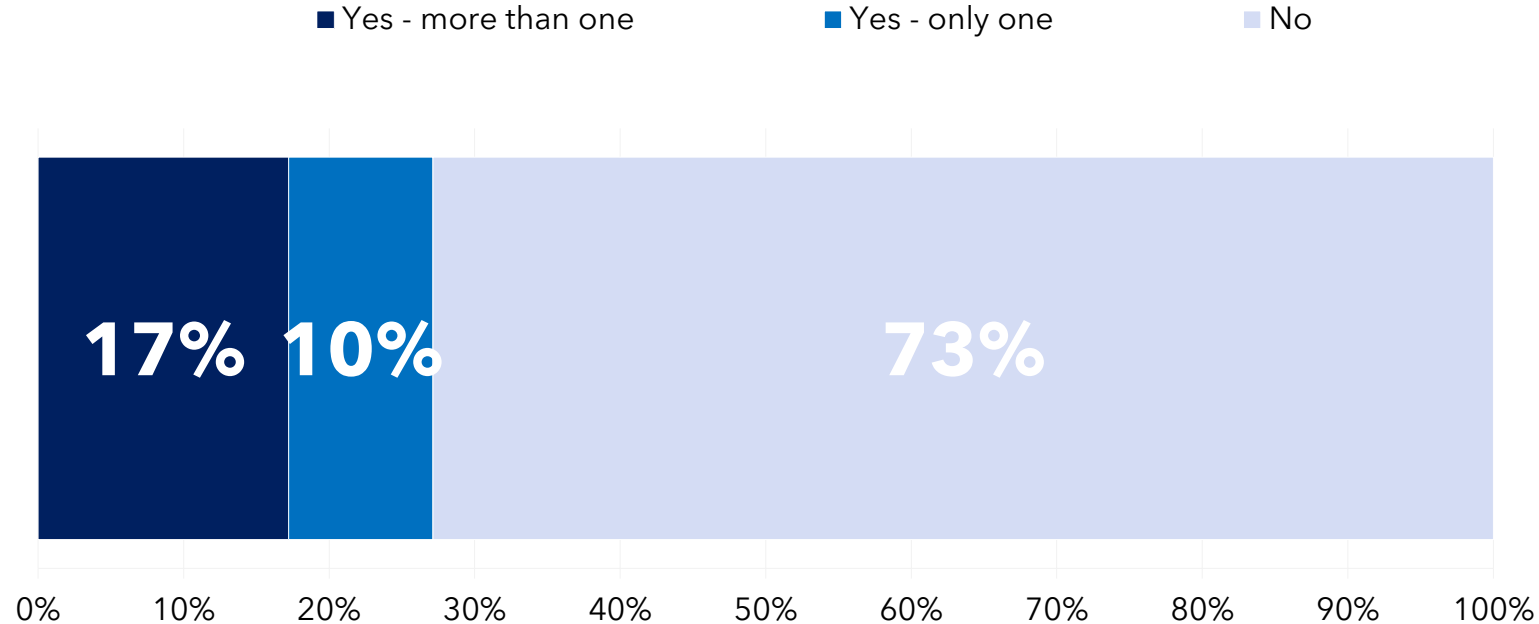
## HOW OFTEN?

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

n = 56,759

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

## MAY RESPONDENTS



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## ATTENDANCE SINCE COVID

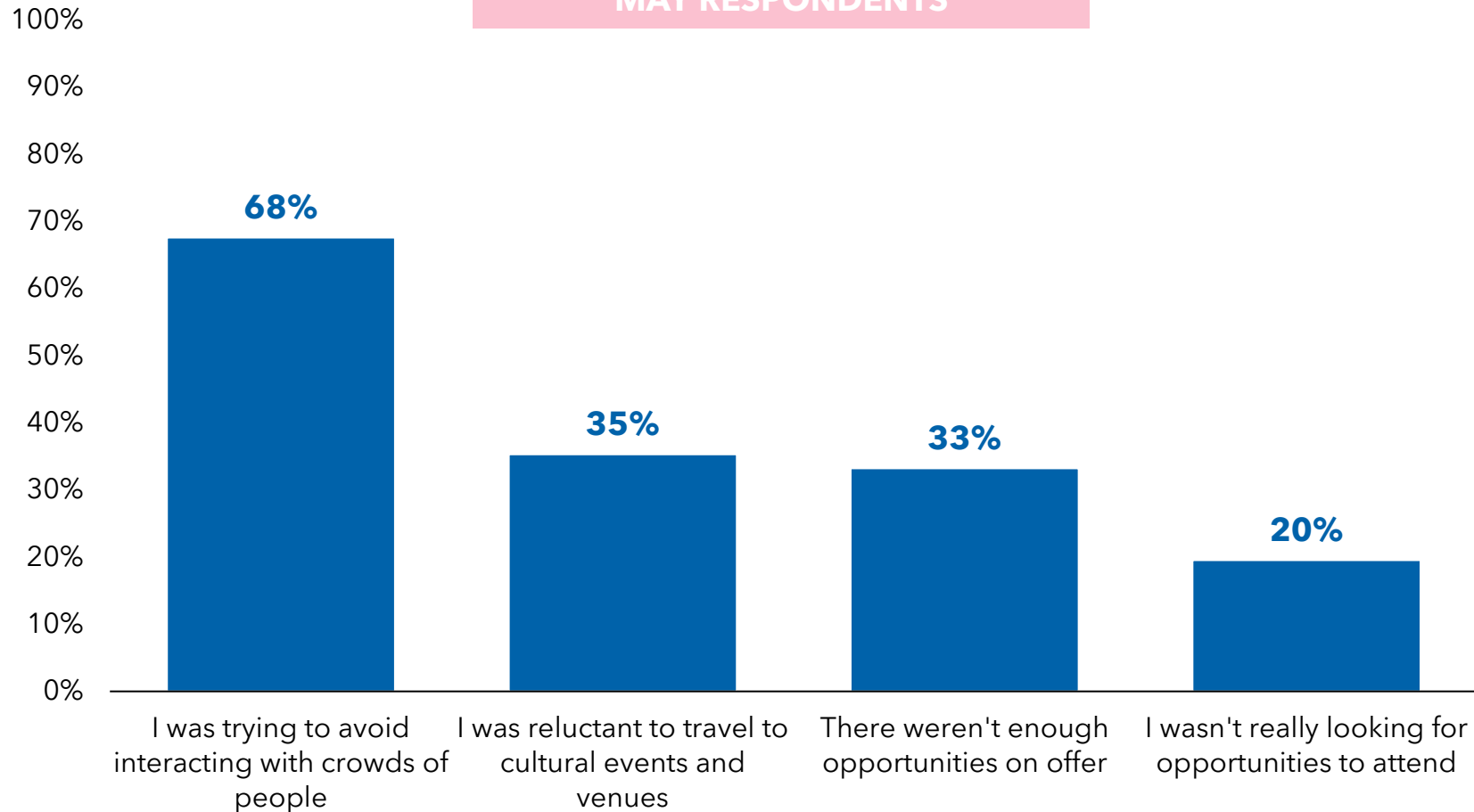
- 27% of May respondents have attended a cultural event since July 2020
- Younger people are more likely to have attended events since re-opening, including multiple events
- Over 75s are least likely

n = 7,170



# If not, why is that?

MAY RESPONDENTS



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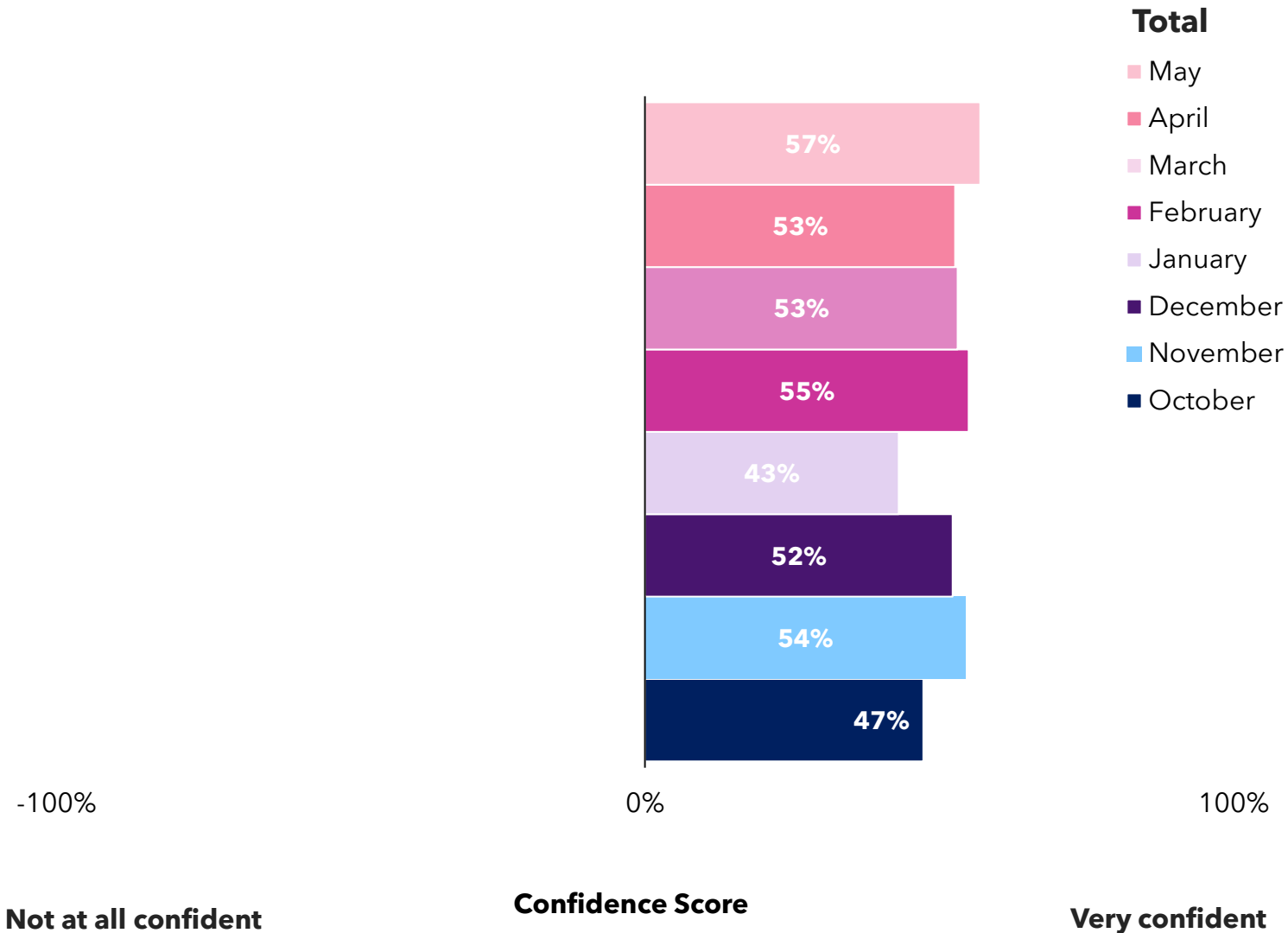


## REASONS FOR NOT ATTENDING

- Concerns about crowds of people is the main reason given for why people have not attended

n = 5,254

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



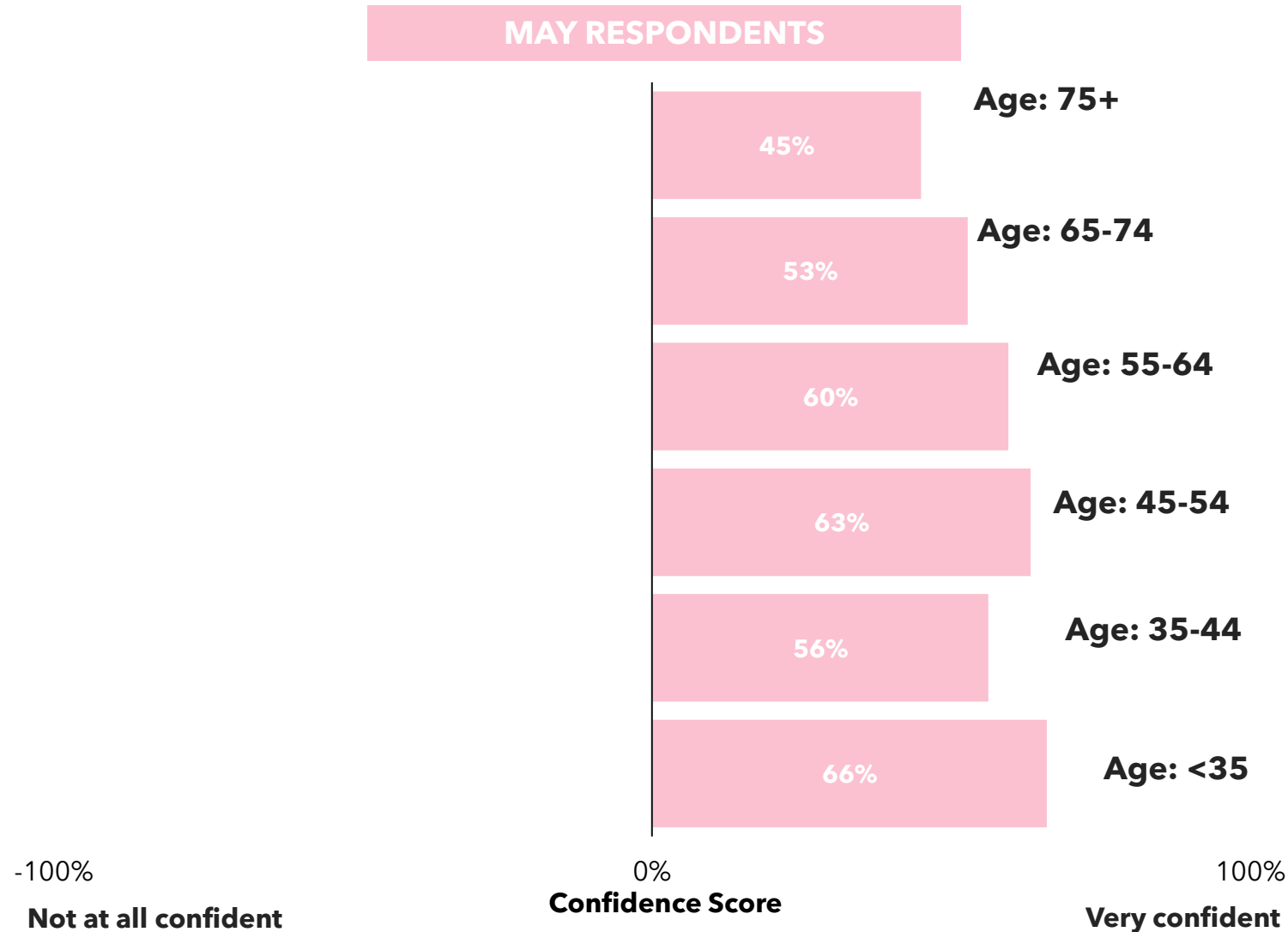
CULTURE RESTART

## CONFIDENCE

- The net confidence score has increased from its low of 43% in Jan

October n = 1,172	February n = 1,236
November n = 1,431	March n = 3,286
December n = 1,004	April n = 1,533
January n = 1,095	May n = 1,797

# 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
- Confidence has increased across all age groups since January

May n = 1,763

# Attendance since Covid- 19



## RETURNED

24% OF RESPONDENTS HAVE ATTENDED A CULTURAL EVENT SINCE JULY 2020

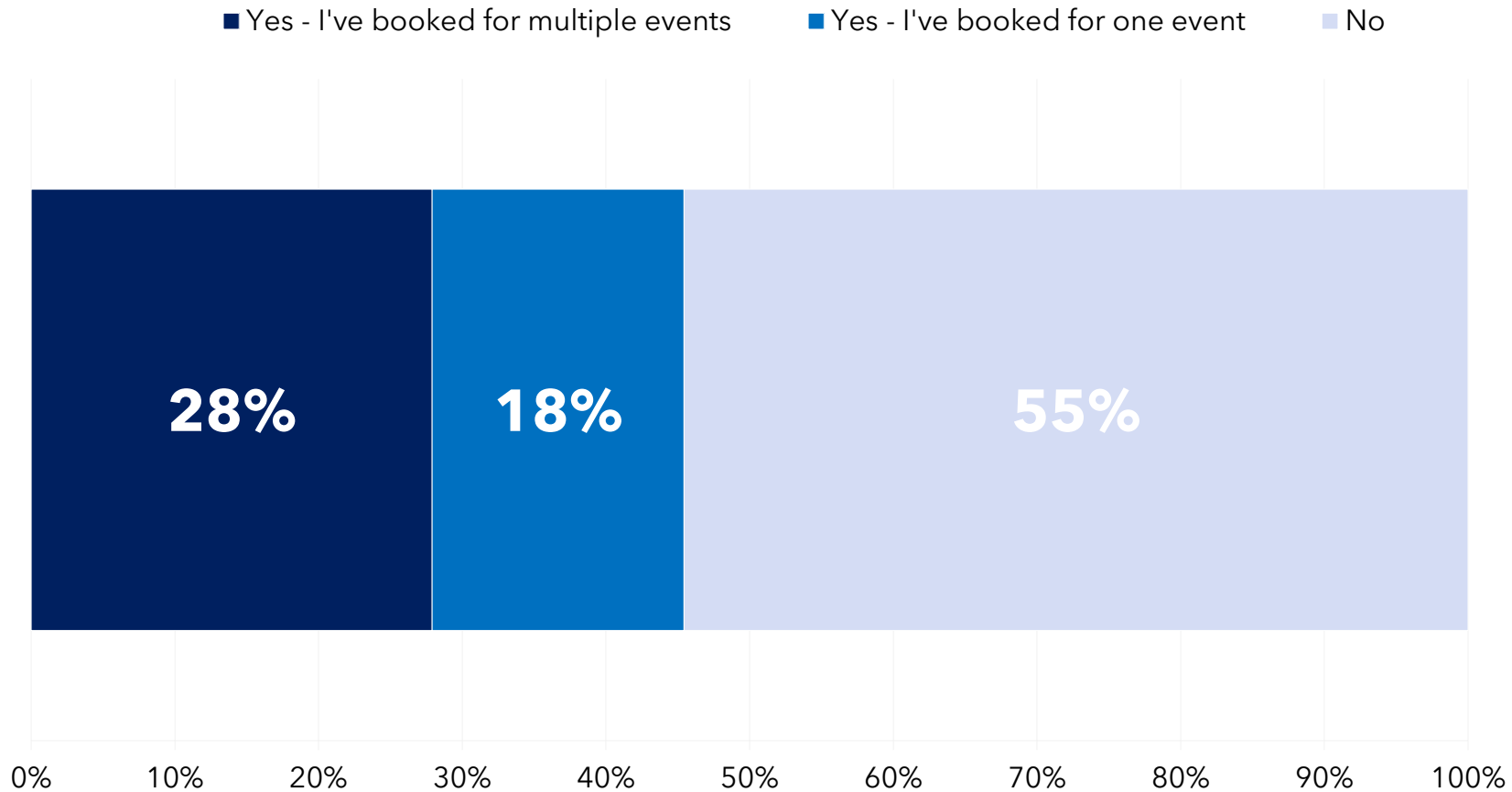


## CONFIDENT

CONFIDENCE HAS BOUNCED BACK SINCE JANUARY, REACHING +57% IN MAY

# Bookings for future events

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



## FUTURE EVENTS

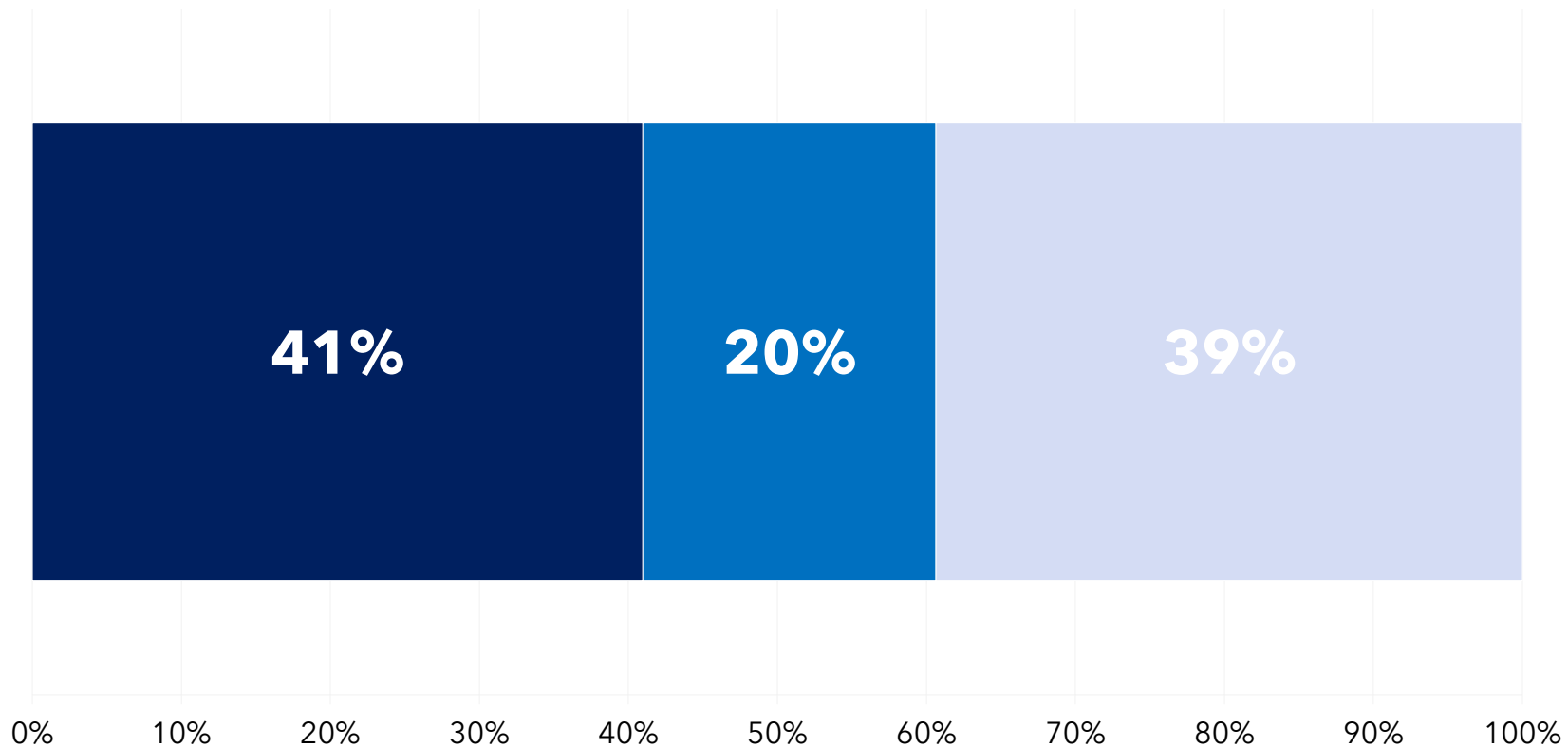
- 45% of respondents have booked future events
- Those who have booked are more likely to have booked for multiple events than one event

n = 56,849

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

## MAY RESPONDENTS

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



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## FUTURE EVENTS

- 61% of May respondents have booked future events
- Those who have booked are more likely to have booked for multiple events than one event

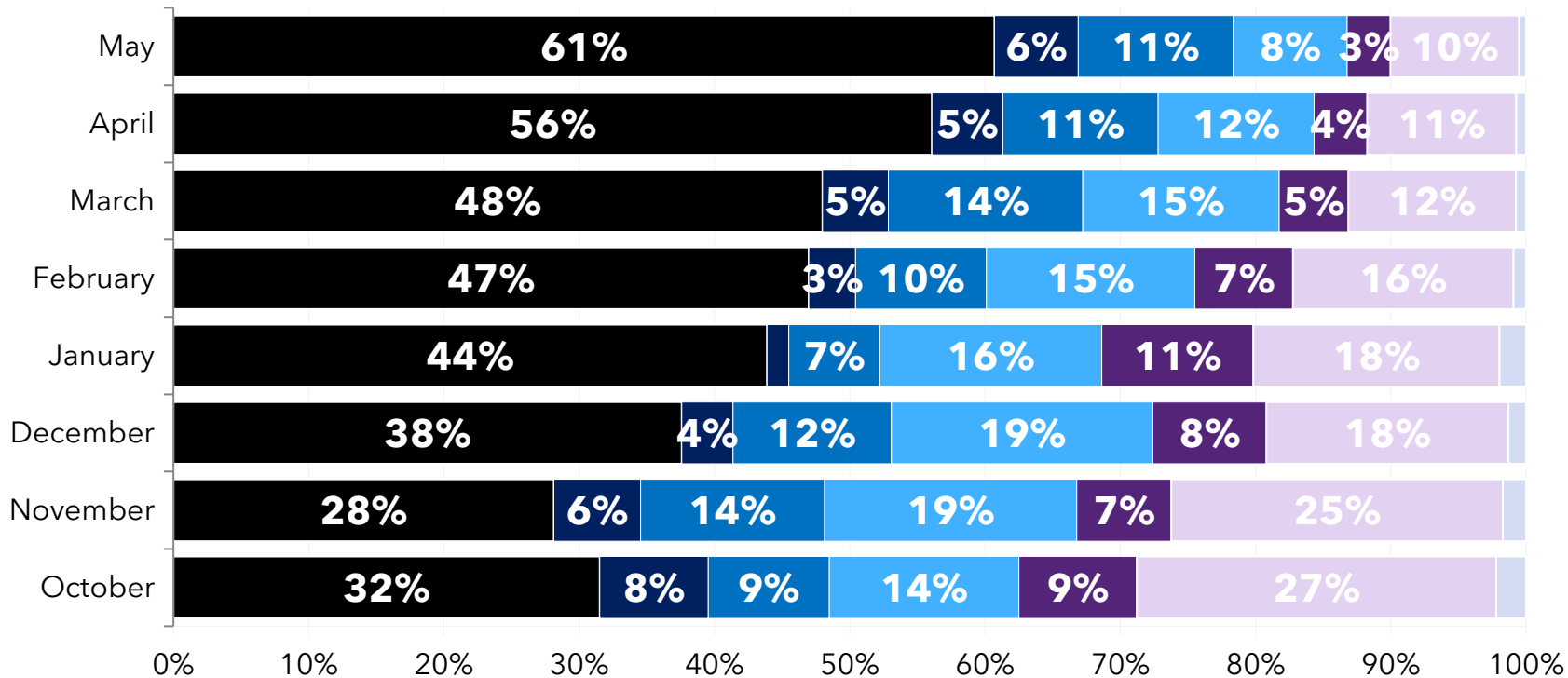
n = 7,170

# 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?

■ 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



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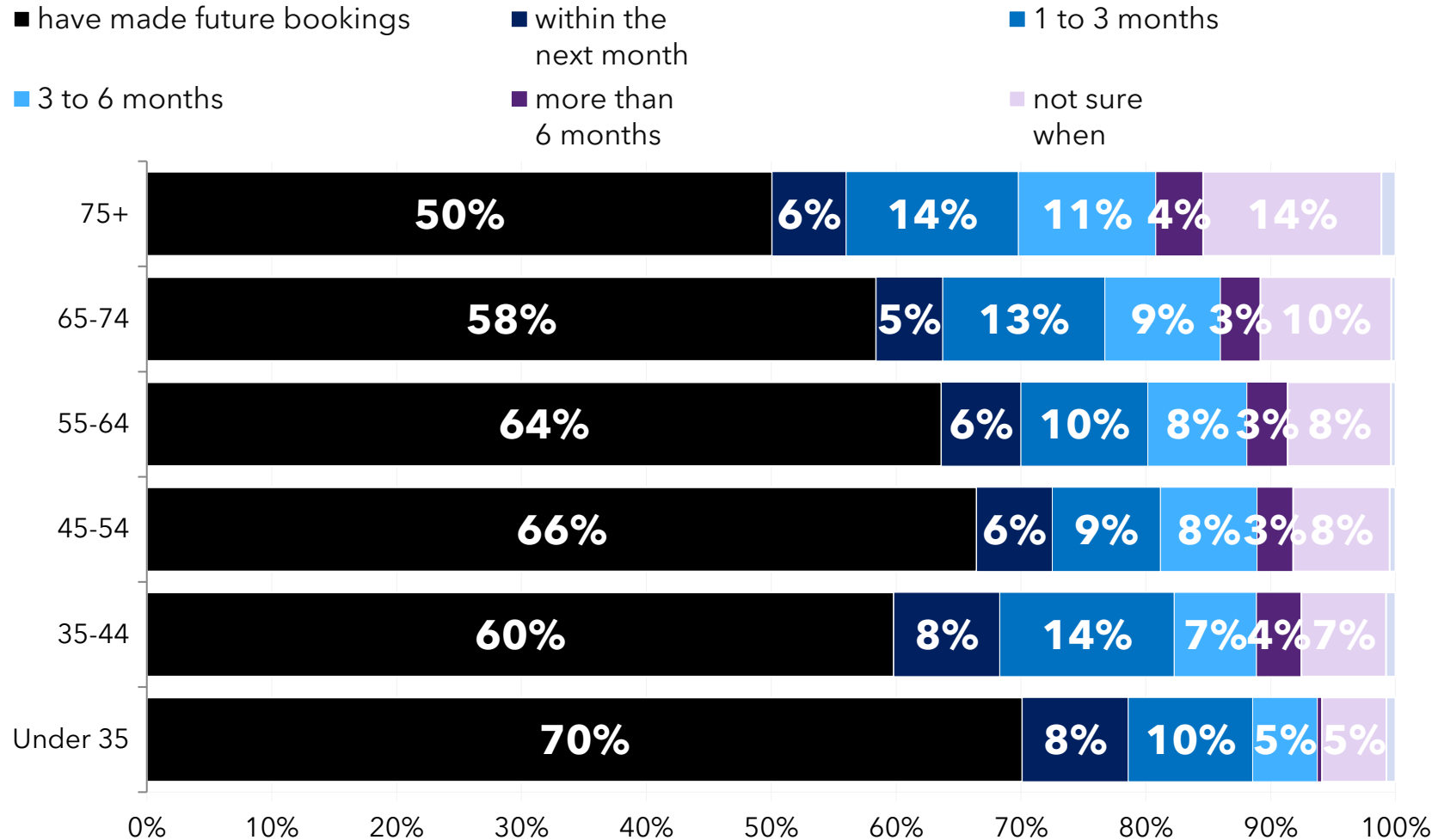
## READY TO BOOK

- Increase in the proportion who have made future bookings since November
- Reduction in proportion who are not sure when
- In May, 22% are not ready to book for at least another 3 months

October n = 4,948      February n = 5,763  
 November n = 6,887      March n = 14,473  
 December n = 4,770      April n = 7,545  
 January n = 5,261      May n = 7,163

# 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?

## MAY RESPONDENTS



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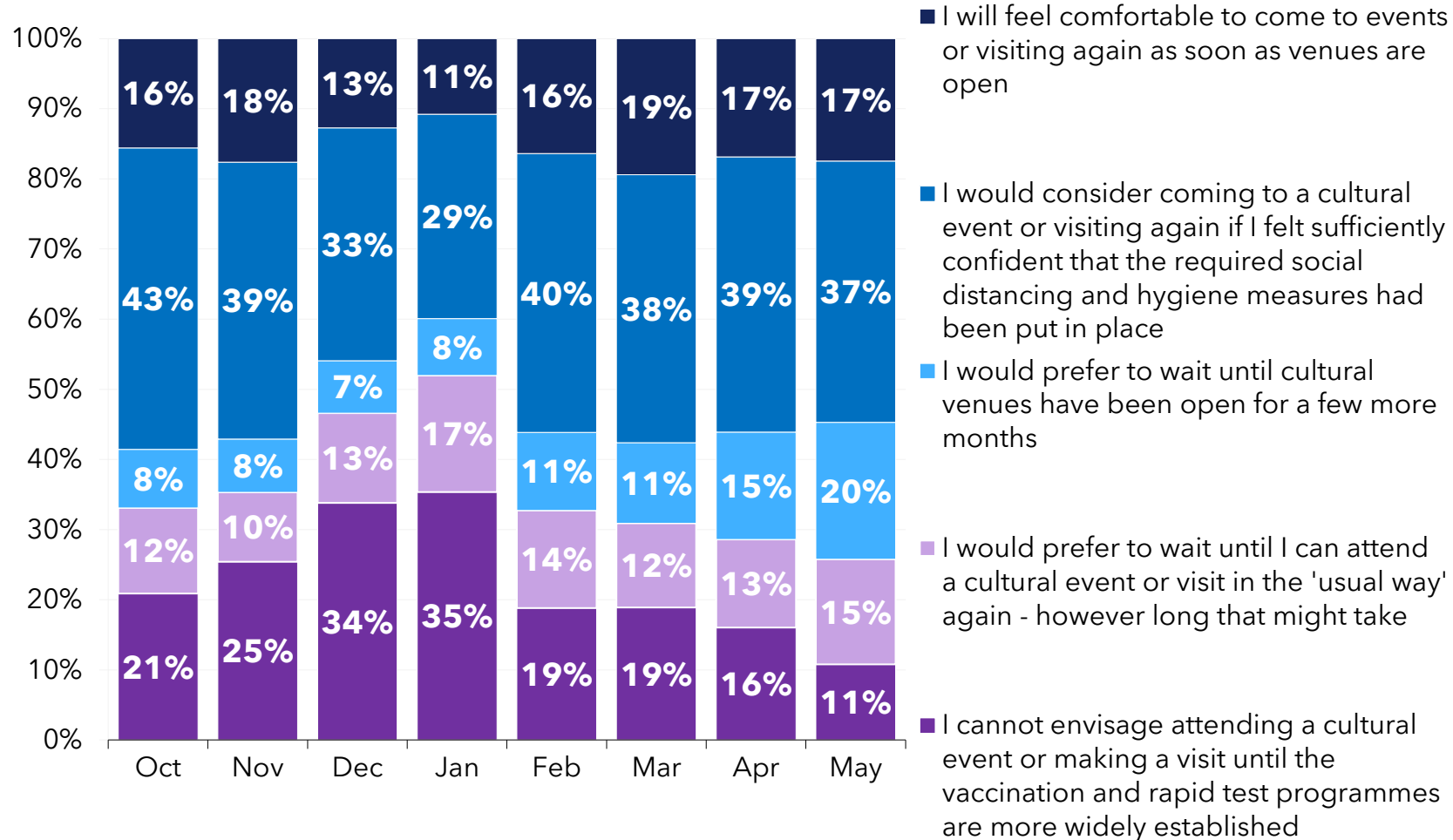
## READY TO BOOK

- In May, about 65% of age groups under 65 had booked for future events
- Those over 65 still more hesitant (and over 75 more so)

May responses:

Under 35 n = 271; 34-44 n = 530;  
45-54 n = 1,073; 55-64 n = 1,990;  
65-74 n = 2,346; 75+n = 791

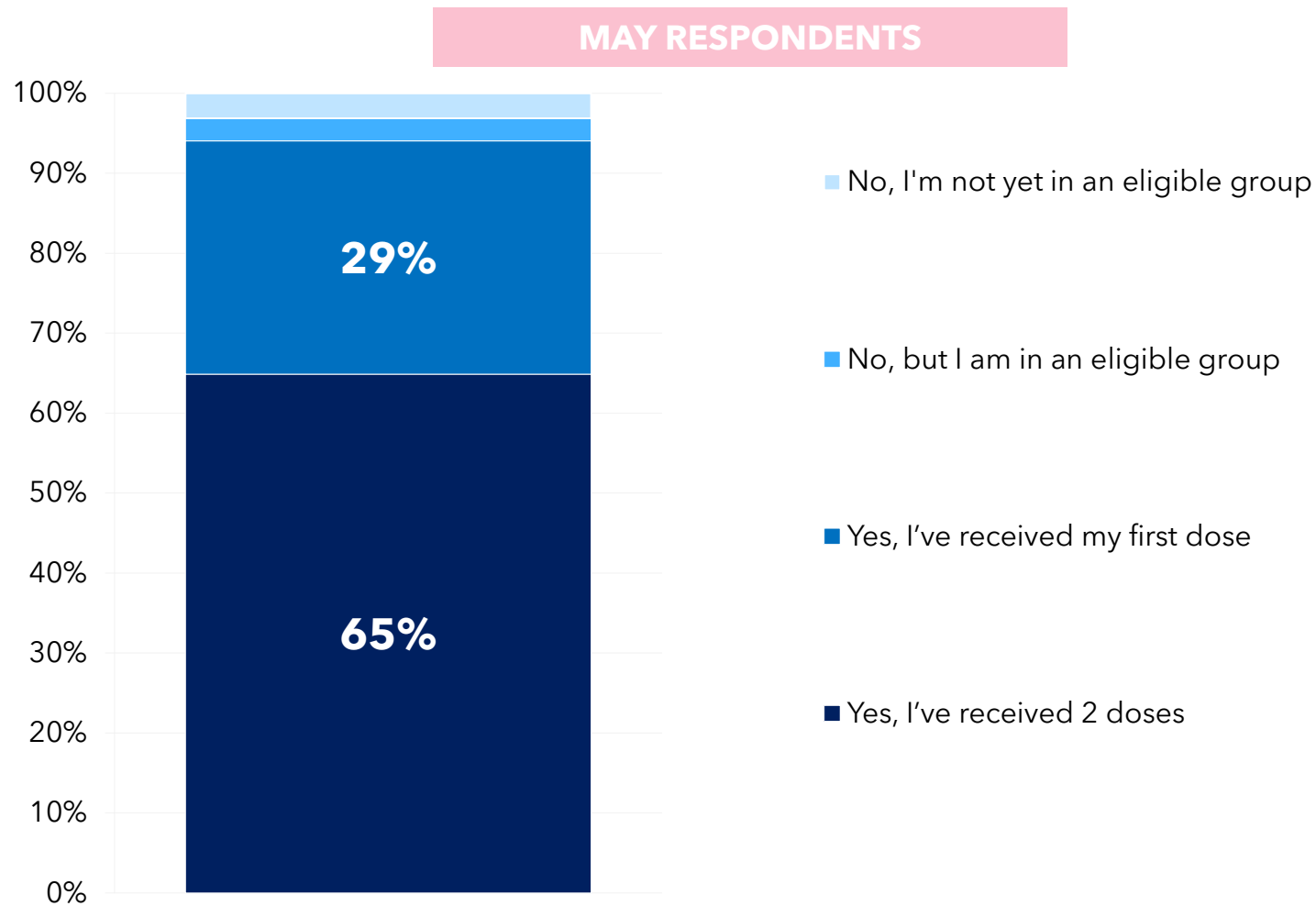
# Please tell us which of the following statements best fits how you're currently feeling about coming out to events at a venue again.



## 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 11% in May
- |                    |                    |
|--------------------|--------------------|
| October n = 3,358  | February n = 3,042 |
| November n = 4,904 | March n = 7,465    |
| December n = 2,949 | April n = 3,226    |
| January n = 2,927  | May n = 2,763      |

# Have you received a Covid-19 vaccine?



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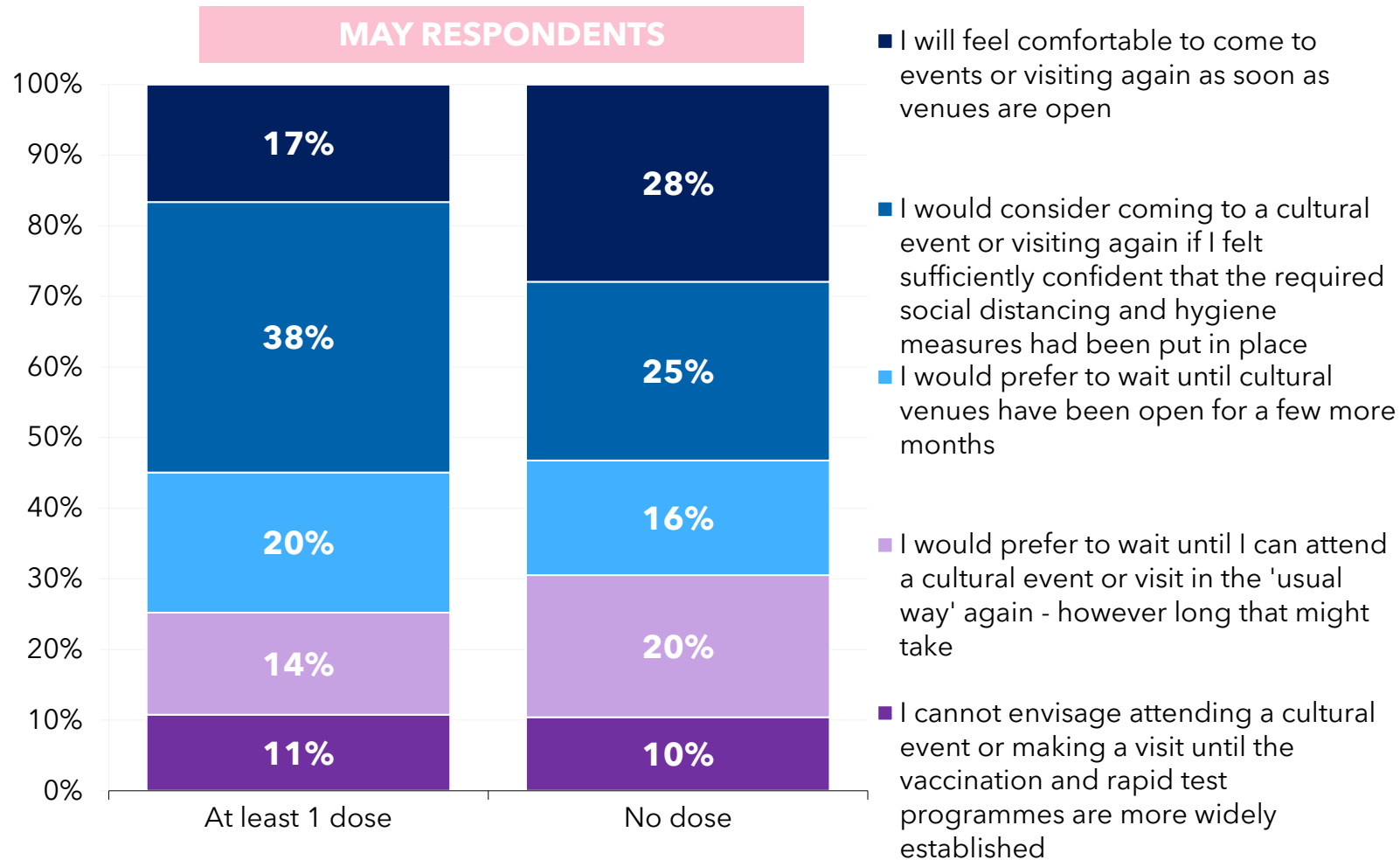


## VACCINATION

- Nearly 95% of May respondents have had at least one dose of the vaccine

May n = 7,070

# 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

May responses:  
At least 1 dose n = 2,562  
No dose n = 154

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

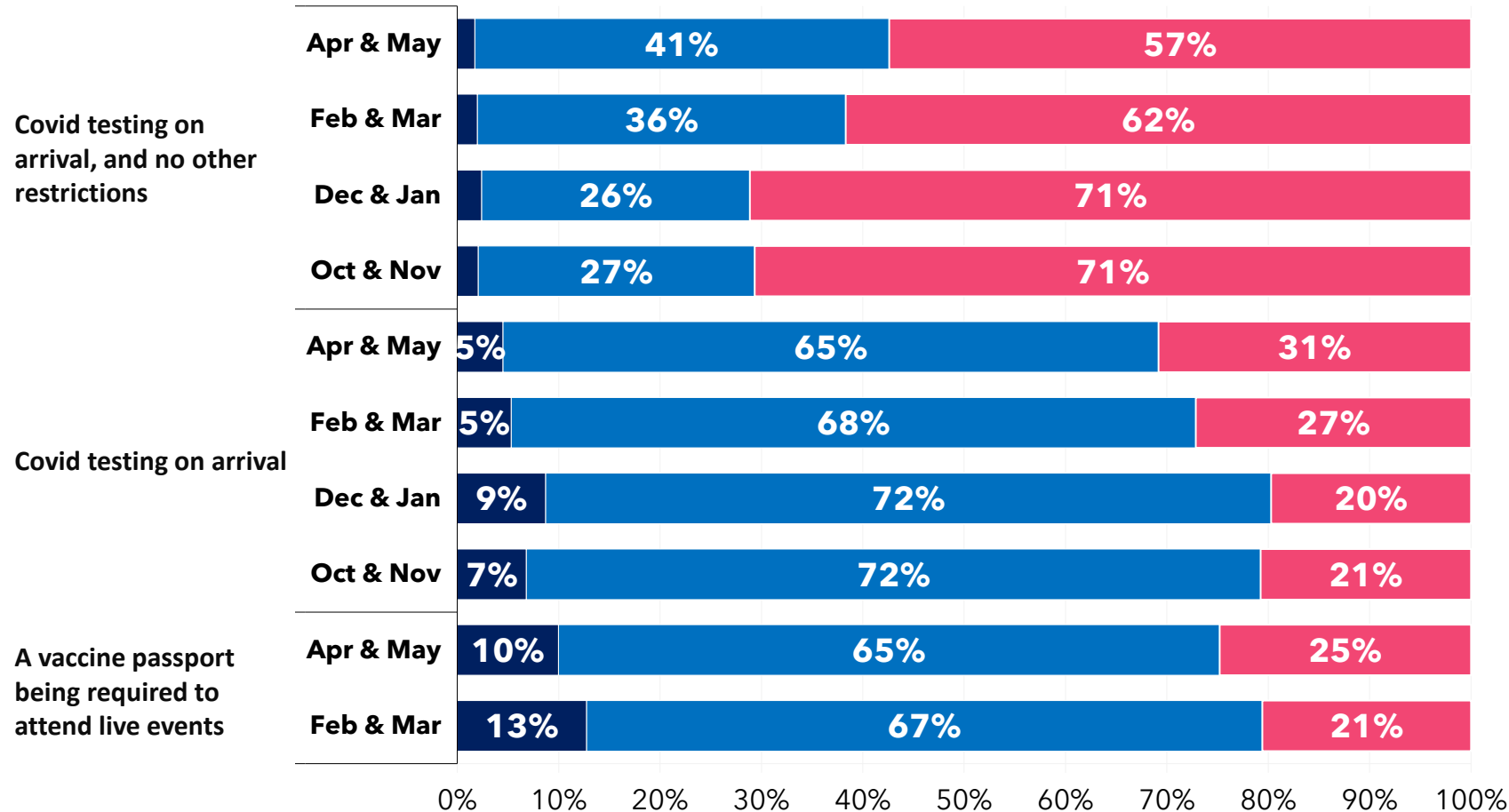


## SAFETY MEASURES

- A majority of respondents would feel uncomfortable about Covid testing on arrival, and no other restrictions, though this fell again in April/May
- 21% feel uncomfortable about vaccine passports

Oct & Nov n = 11,791  
 Dec & Jan n = 10,006  
 Feb & March n = 20,239  
 April & May n = 14,329

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



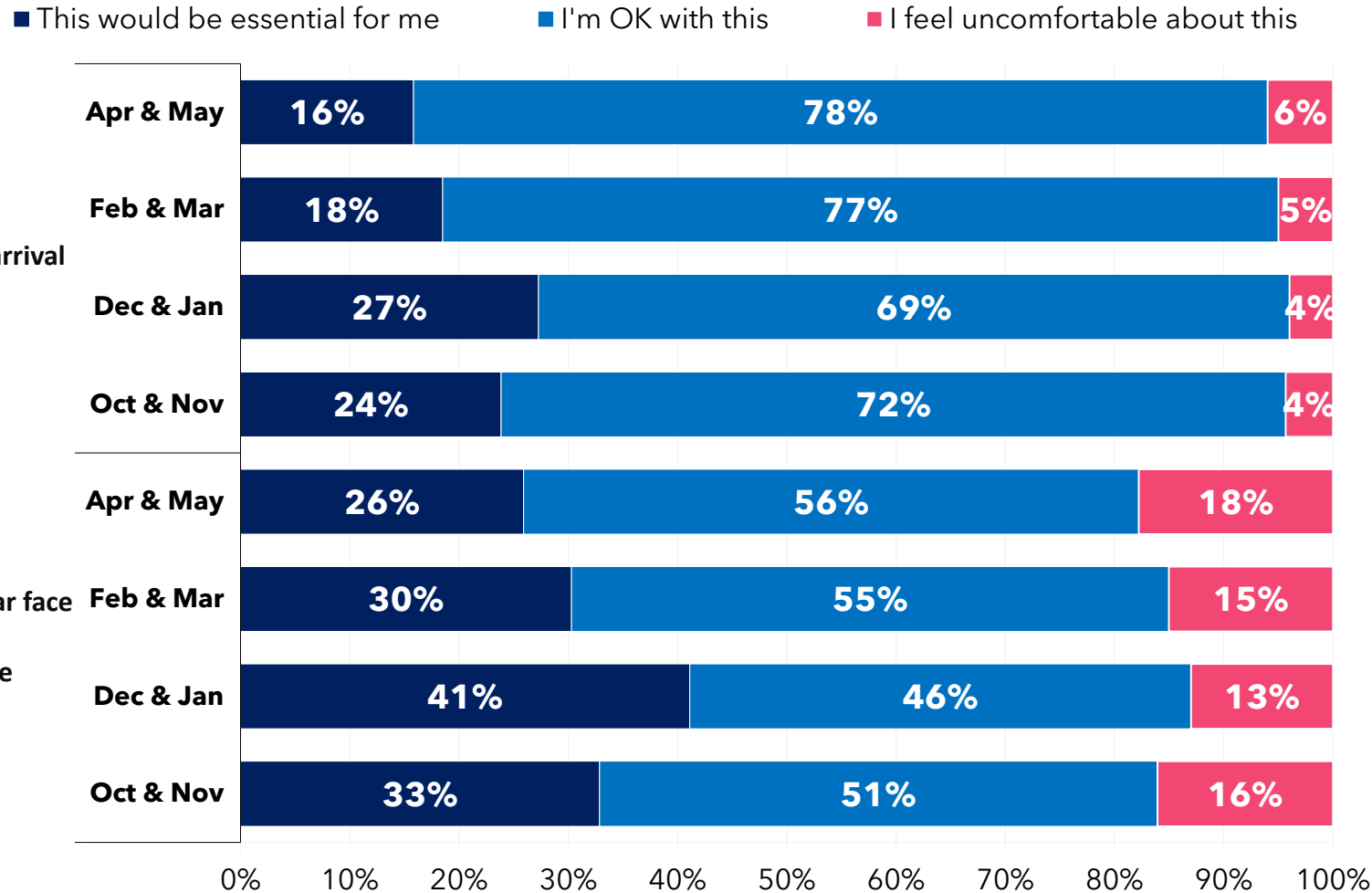
# How would you feel about the following measures being considered or implemented by some cultural organisations?



## SAFETY MEASURES

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

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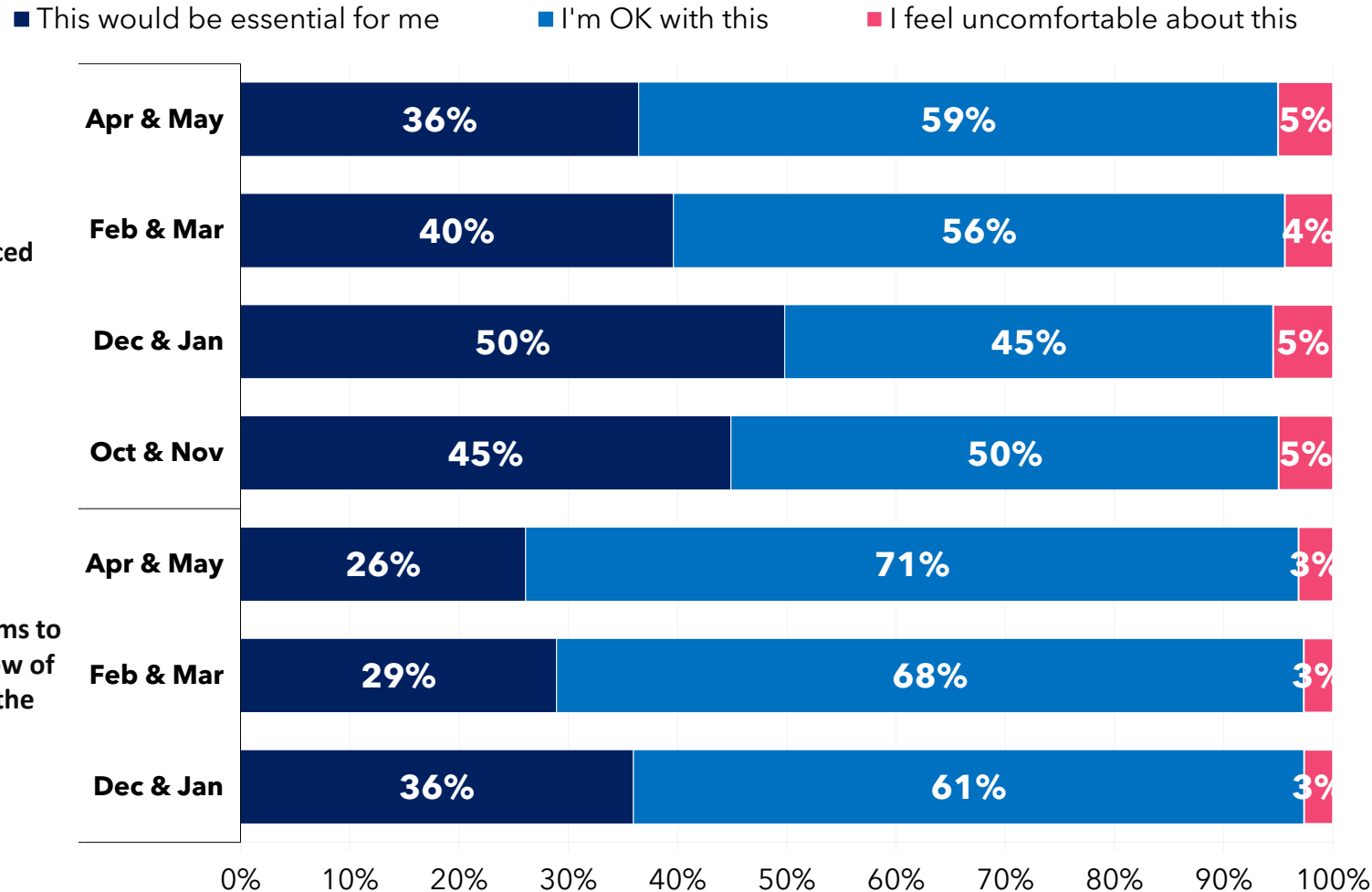
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## SAFETY MEASURES

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

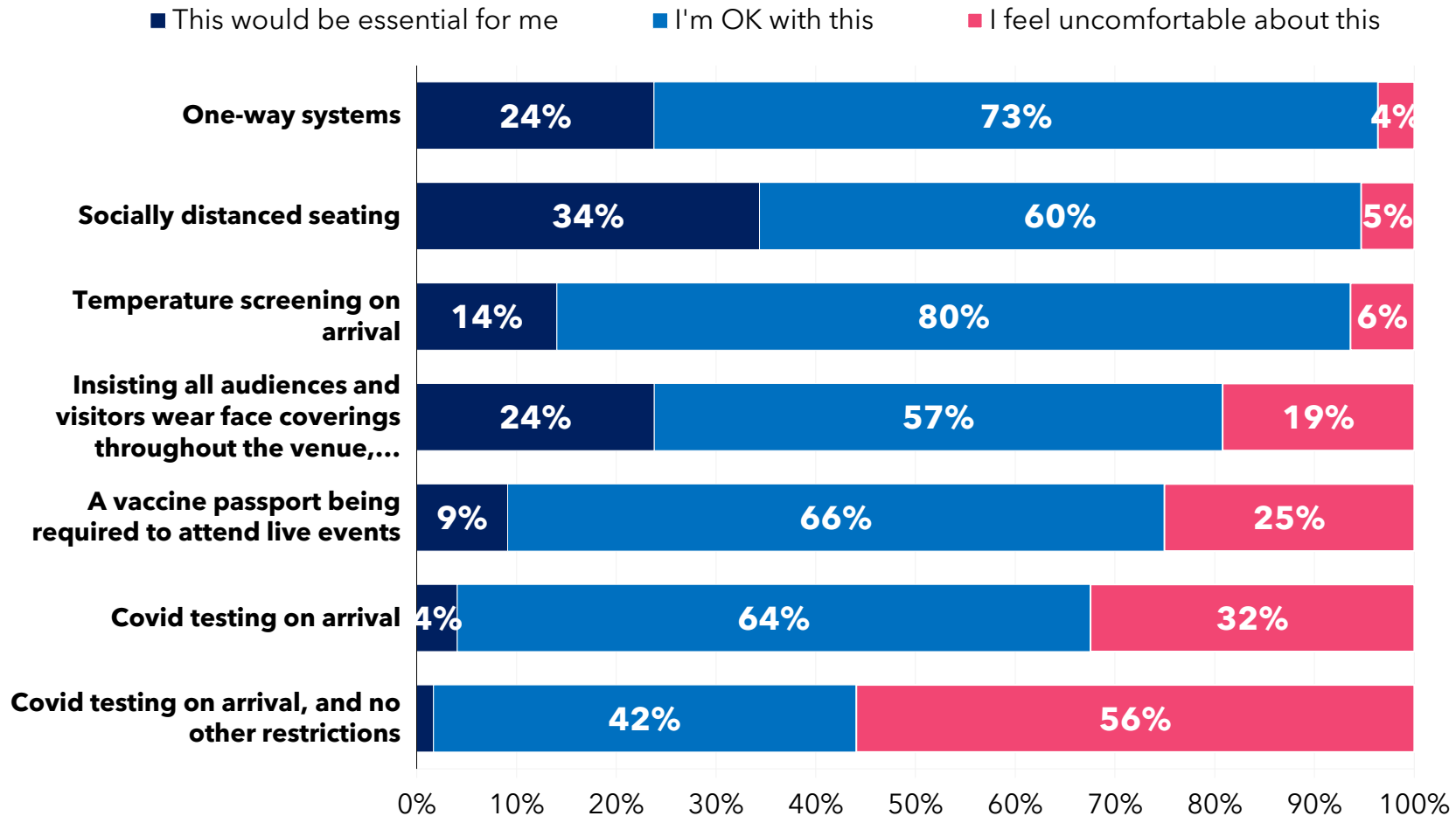
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# How would you feel about the following measures being considered or implemented by some cultural organisations?

MAY RESPONDENTS



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## SAFETY MEASURES

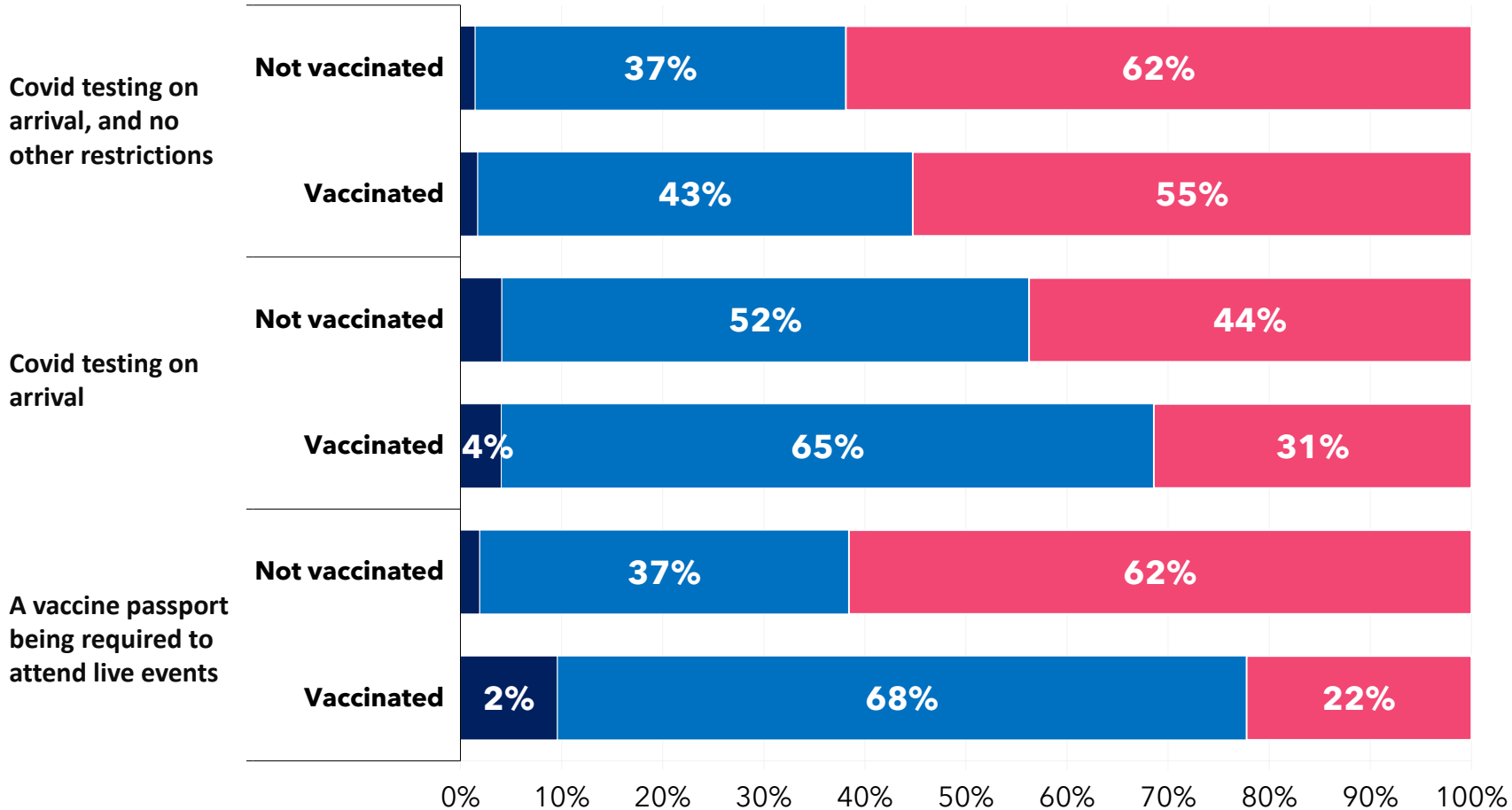
- Respondents were more concerned about Covid testing alongside no other restrictions

n = 7,146

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

MAY RESPONDENTS

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



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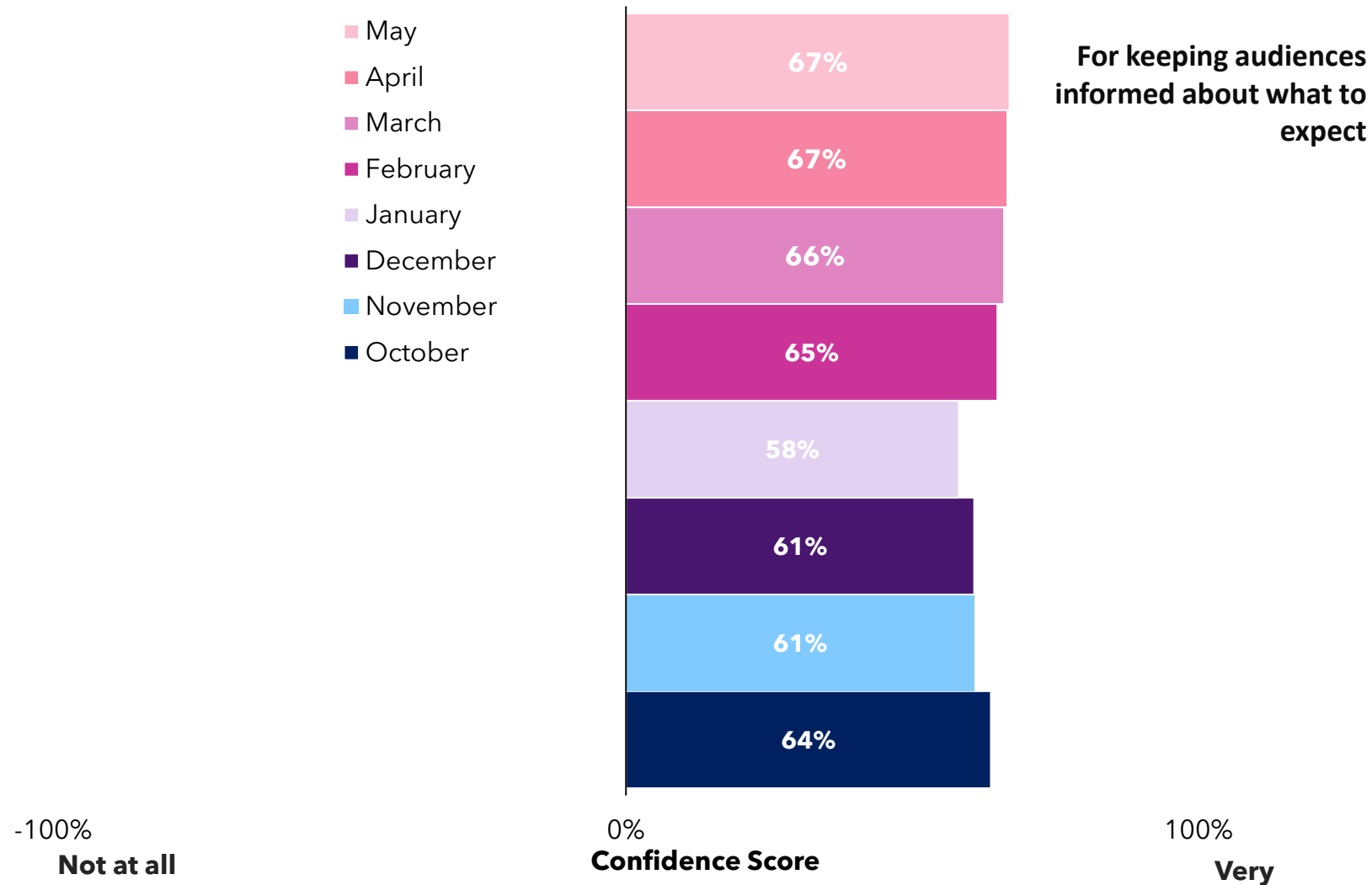


## SAFETY MEASURES

- Those that have not been vaccinated feel significantly more uncomfortable with the idea of a vaccine passport

May responses:  
At least 1 dose n = 6,461  
No dose n = 416

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

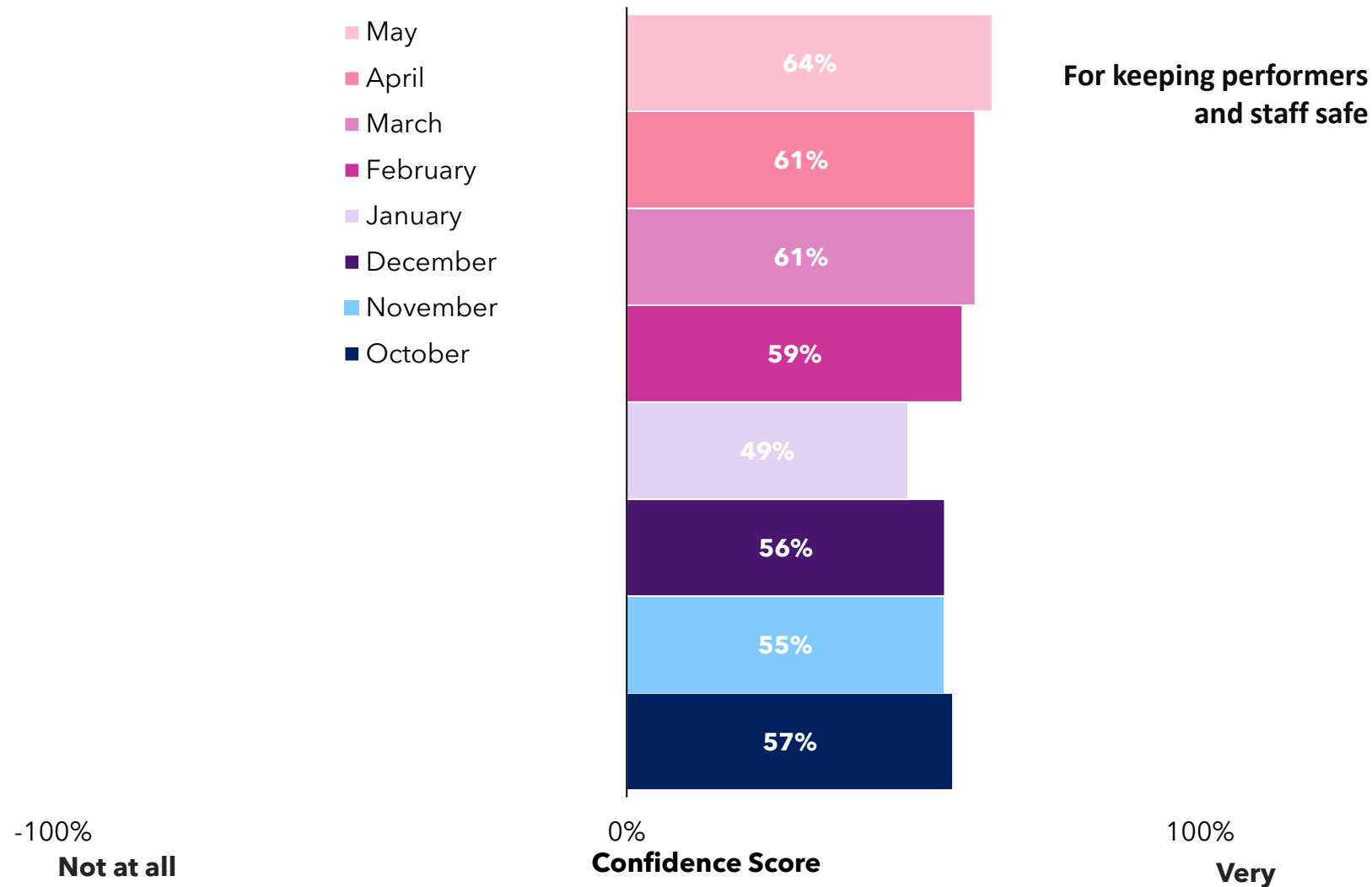


## SAFETY MEASURES

- 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	February n = 5,429
November n = 6,887	March n = 13,567
December n = 4,596	April n = 7,035
January n = 5,045	May n = 6,676

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

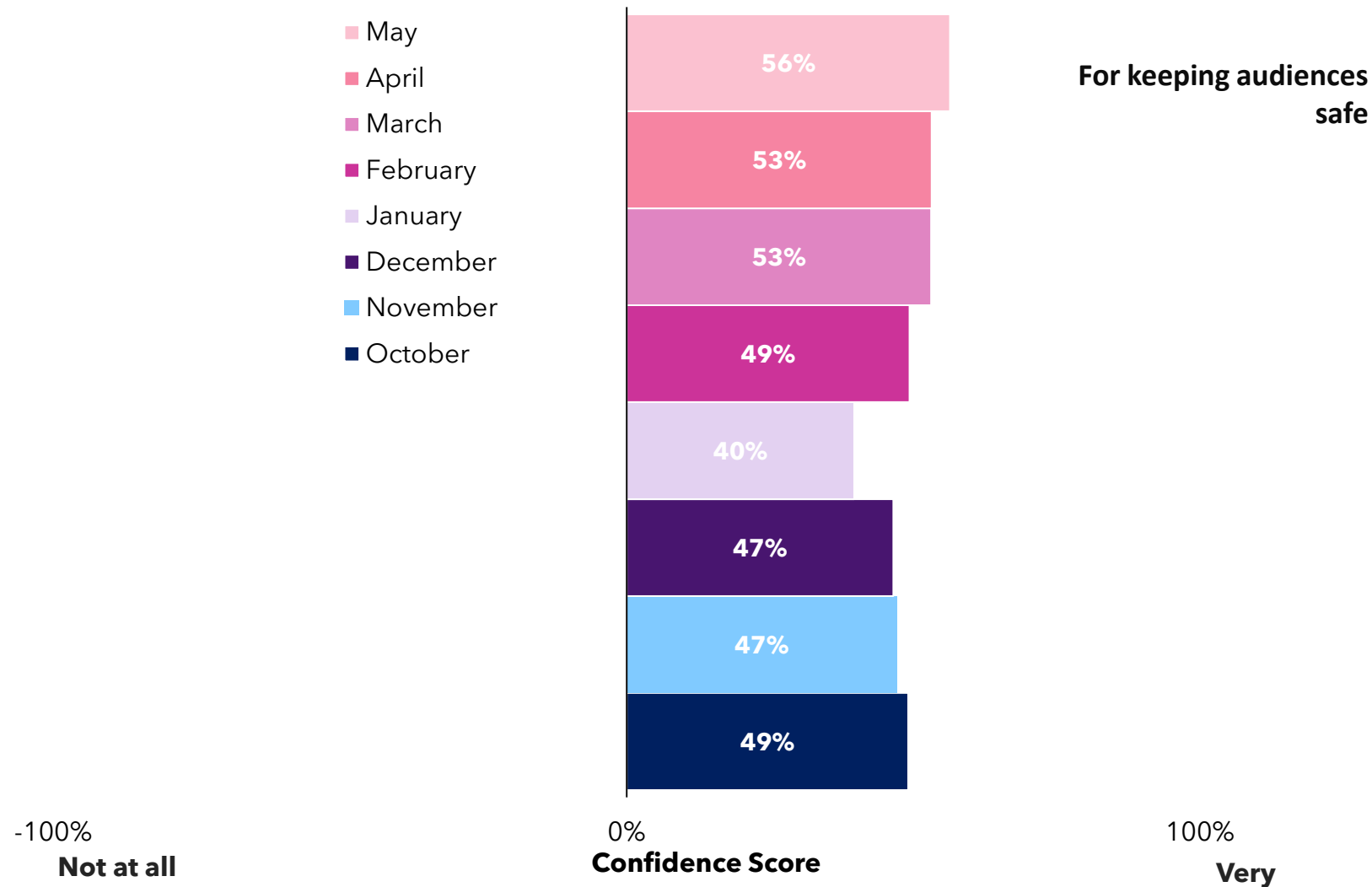


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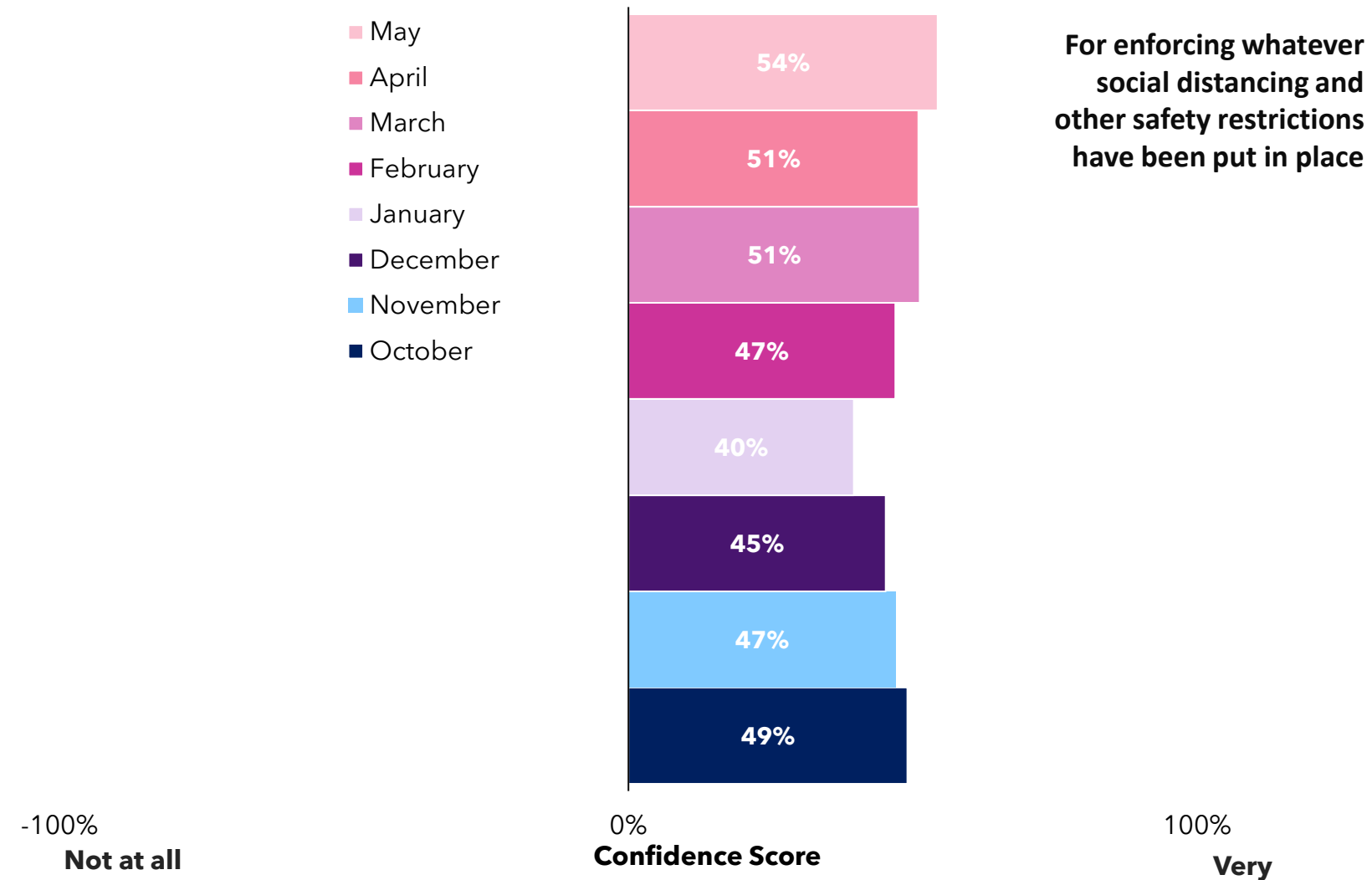


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January n = 5,045	May n = 6,676

# Attitudes to attending cultural events again



## READY TO BOOK

THOSE READY TO BOOK WITHIN THE NEXT 6 MONTHS GREW TO 66% IN MAY

THOSE WAITING FOR A VACCINE FELL FROM 35% IN JAN TO 11% IN MAY



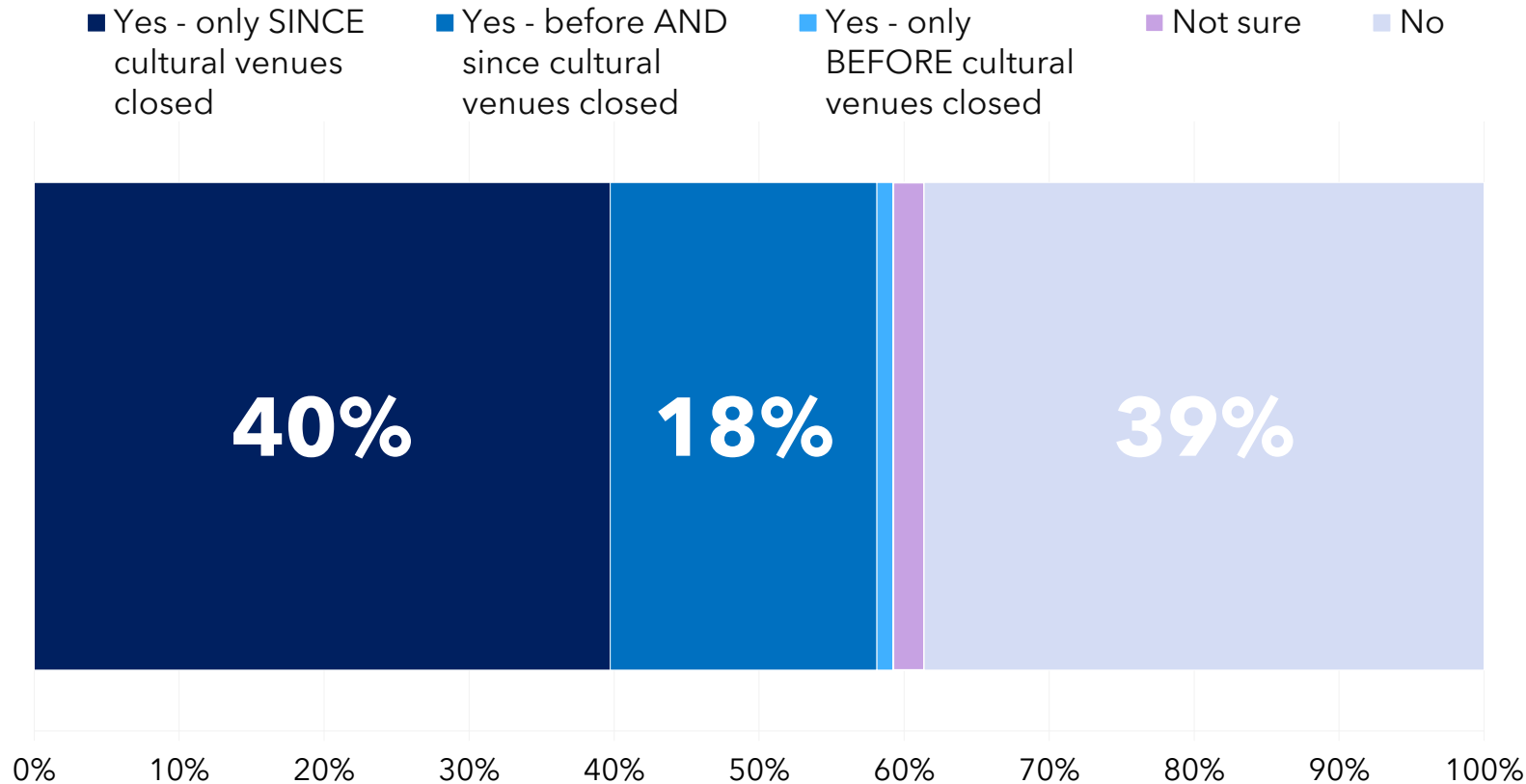
## SAFETY FIRST

56% 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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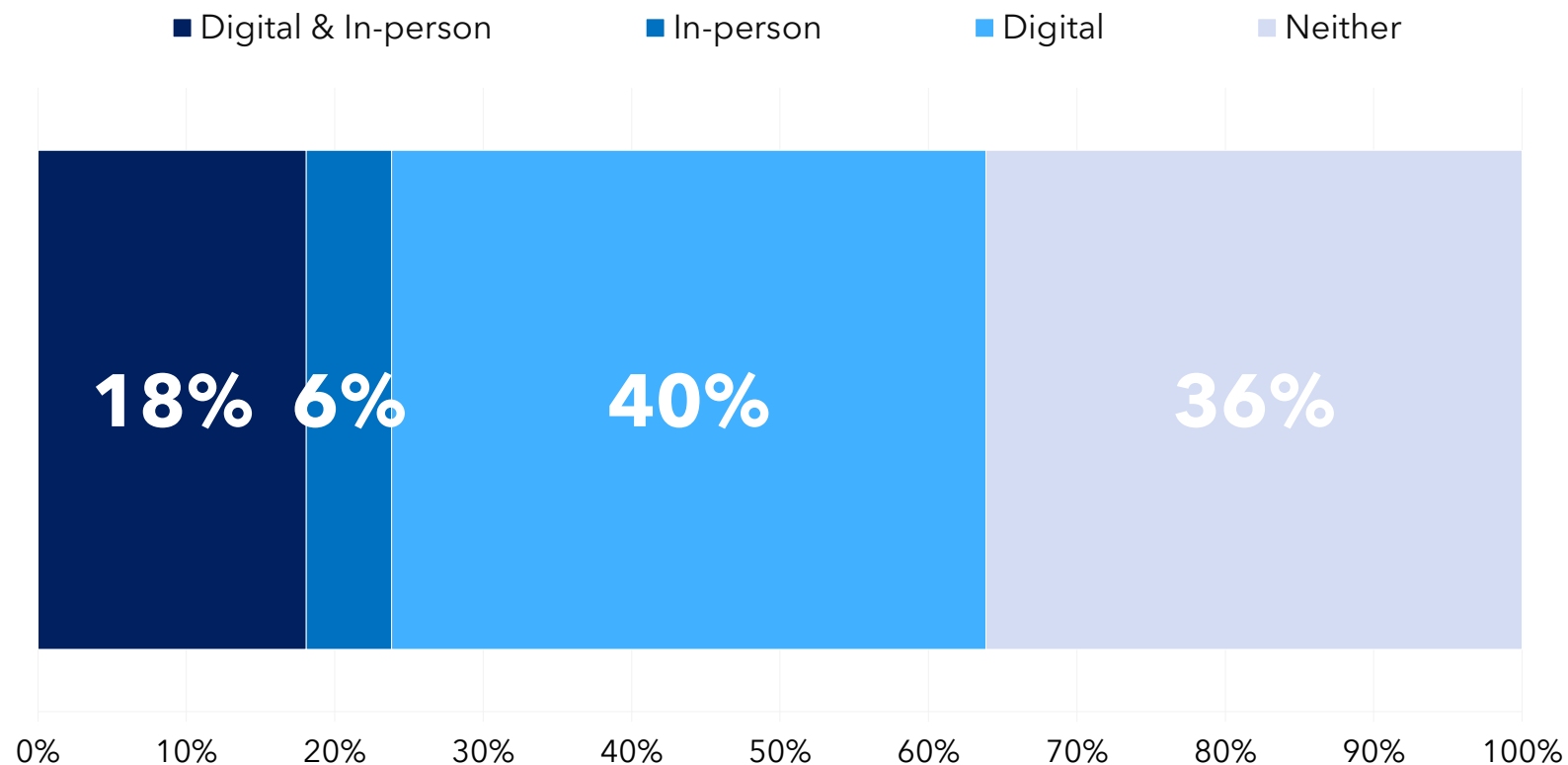


## DIGITAL ENGAGEMENT

- 58% of respondents have engaged with culture online since venues closed in March 2020
- Most of which had only started engaging online since lockdown

n = 56,849

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



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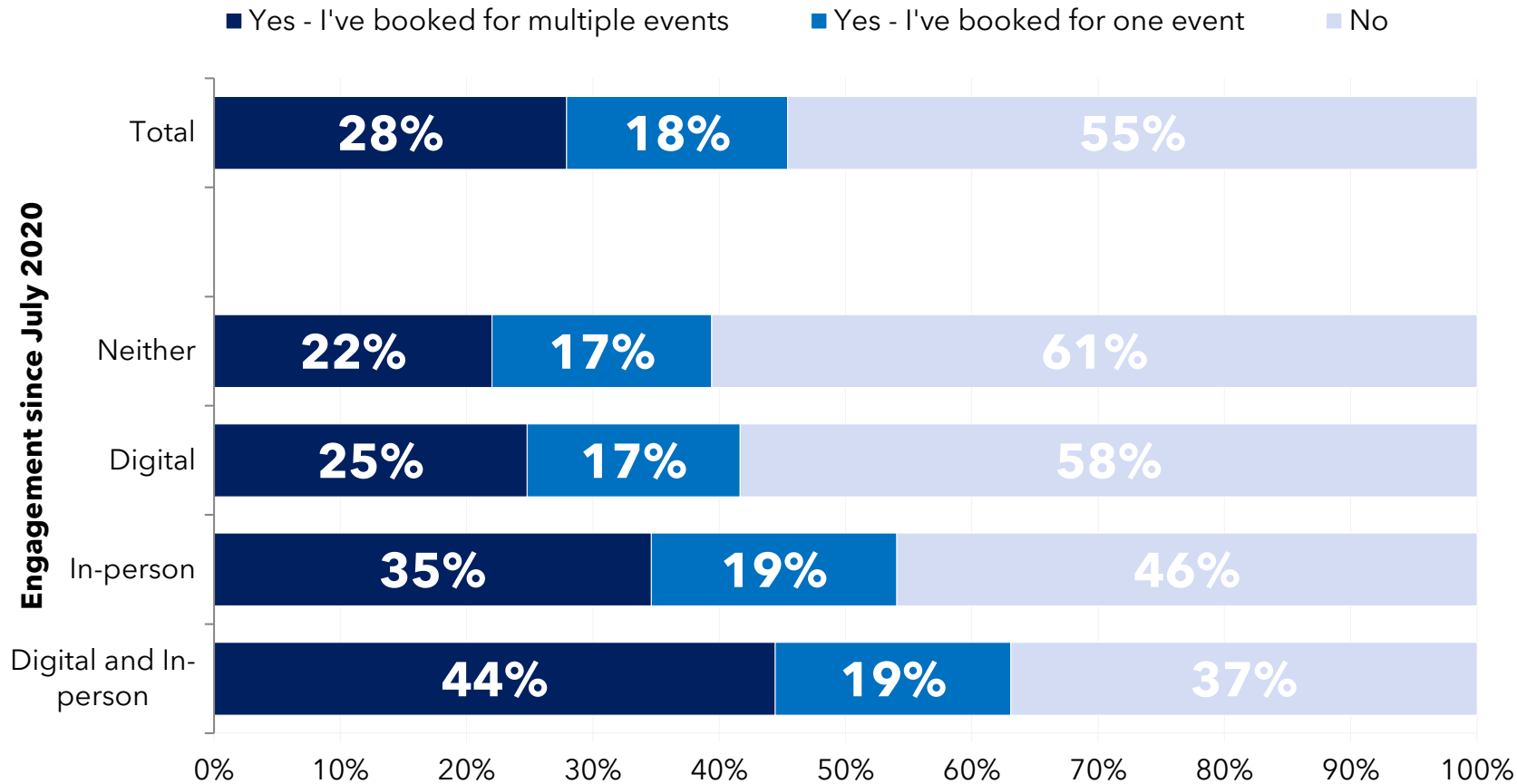


## CULTURAL ENGAGEMENT

- 64% of respondents have engaged with culture either online or in-person since COVID

n = 56,849

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



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## FUTURE EVENTS

- Respondents who have attended since July 2020 are more likely to have booked future events

n = 56,849

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

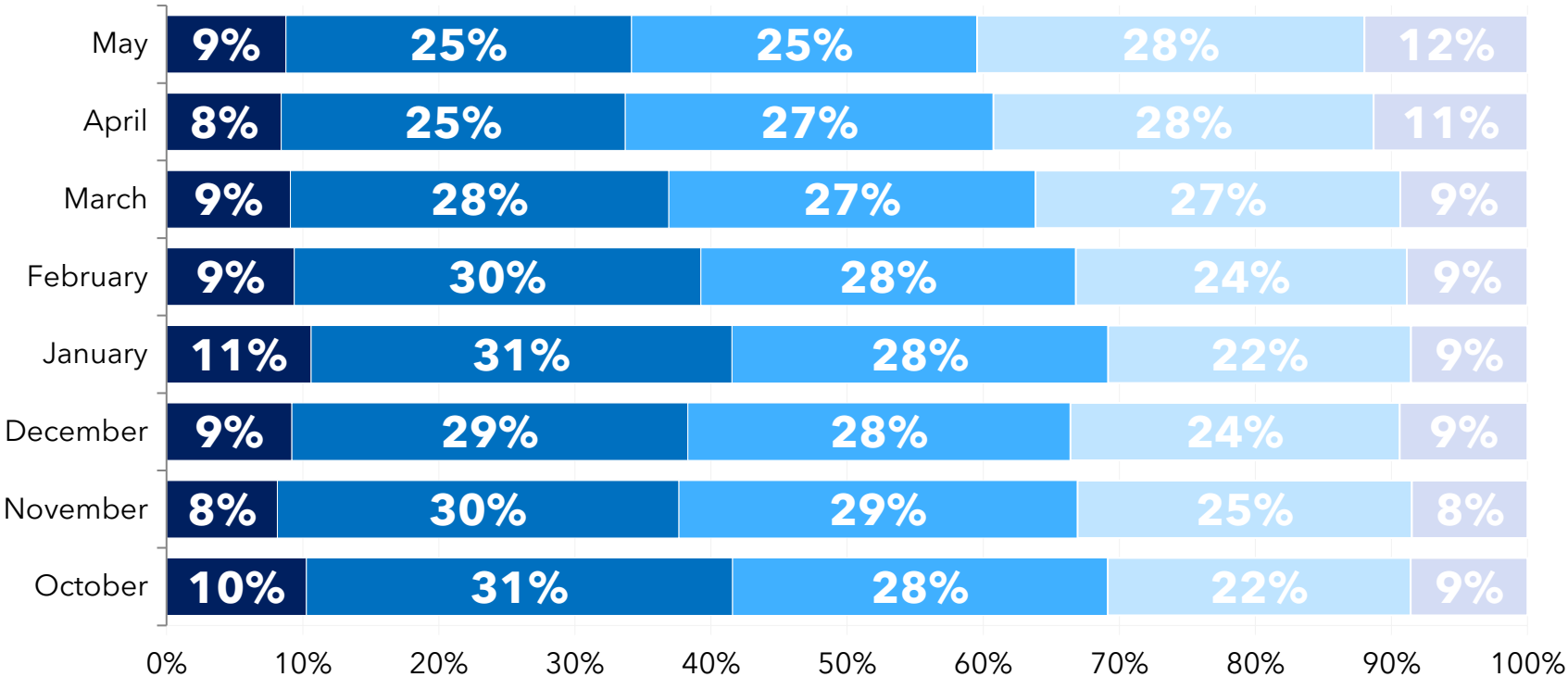


## INTEREST IN DIGITAL IN FUTURE

- Those very interested or interested in engaging with culture online has been 34% in both April and May

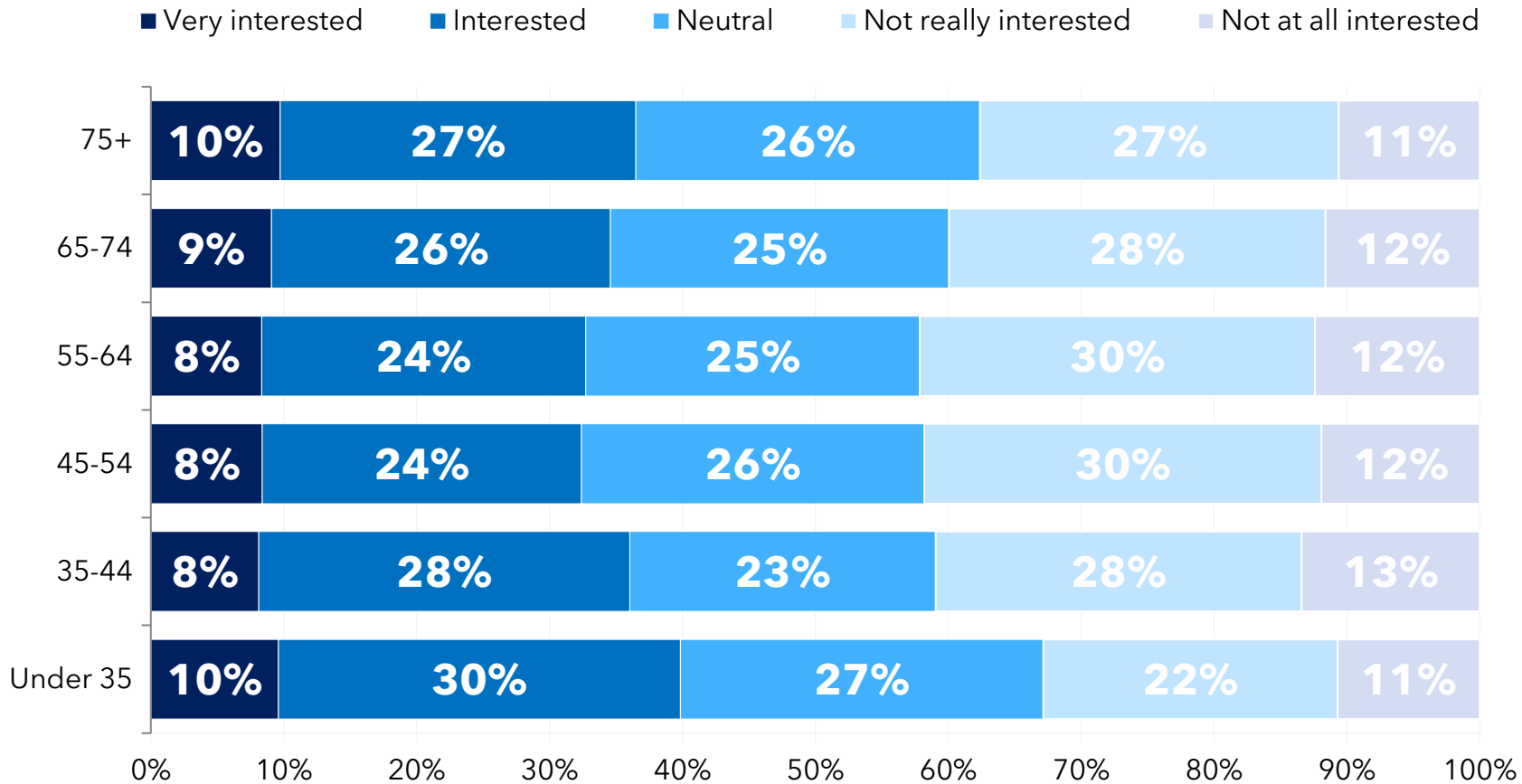
October n = 4,946      February n = 5,771  
 November n = 6,887      March n = 14,490  
 December n = 4,775      April n = 7,550  
 January n = 5,265      May n = 7,170

Very interested   Interested   Neutral   Not really interested   Not at all interested



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

MAY RESPONDENTS



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## INTEREST IN DIGITAL IN FUTURE

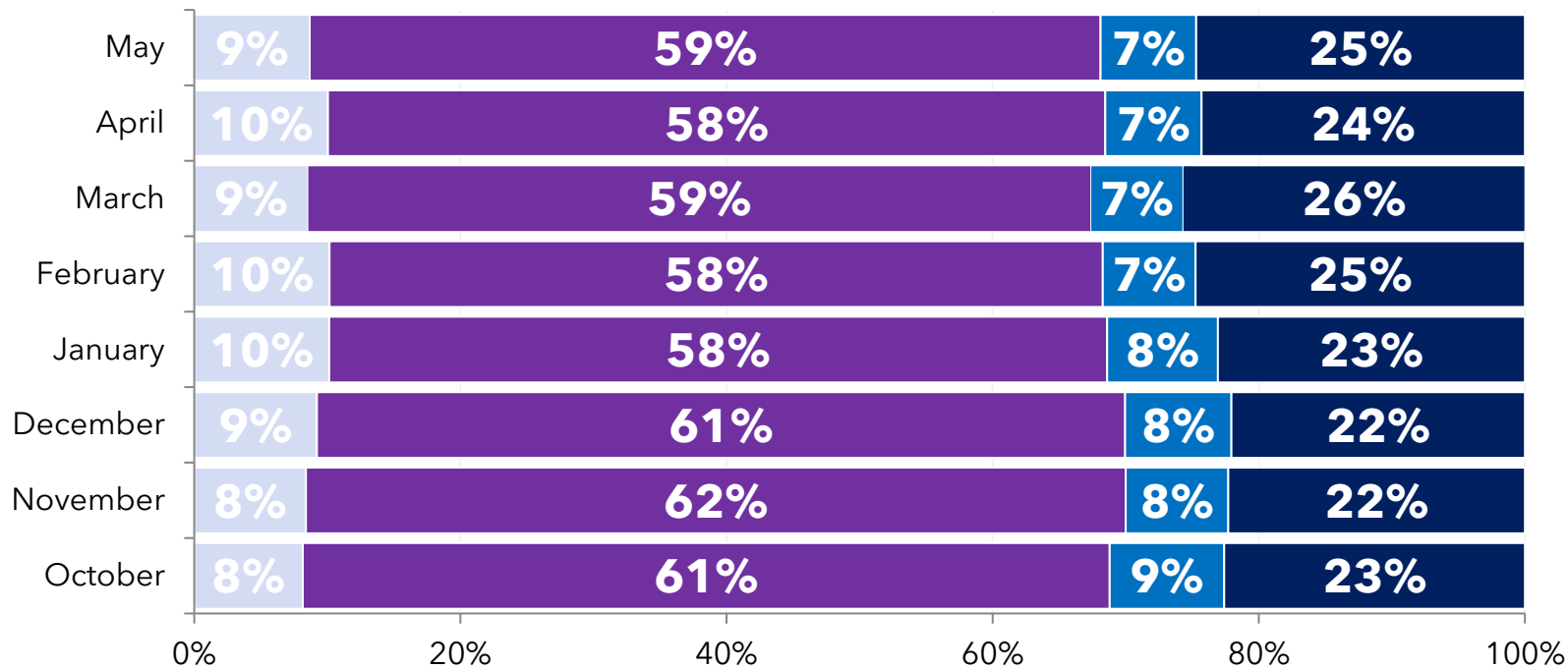
- Under 35s are slightly more interested in engaging with culture online in future

May Responses:

Under 35 n = 271; 34-44 n = 530;  
45-54 n = 1,074; 55-64 n = 1,993;  
65-74 n = 2,348; 75+n = 792

# 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



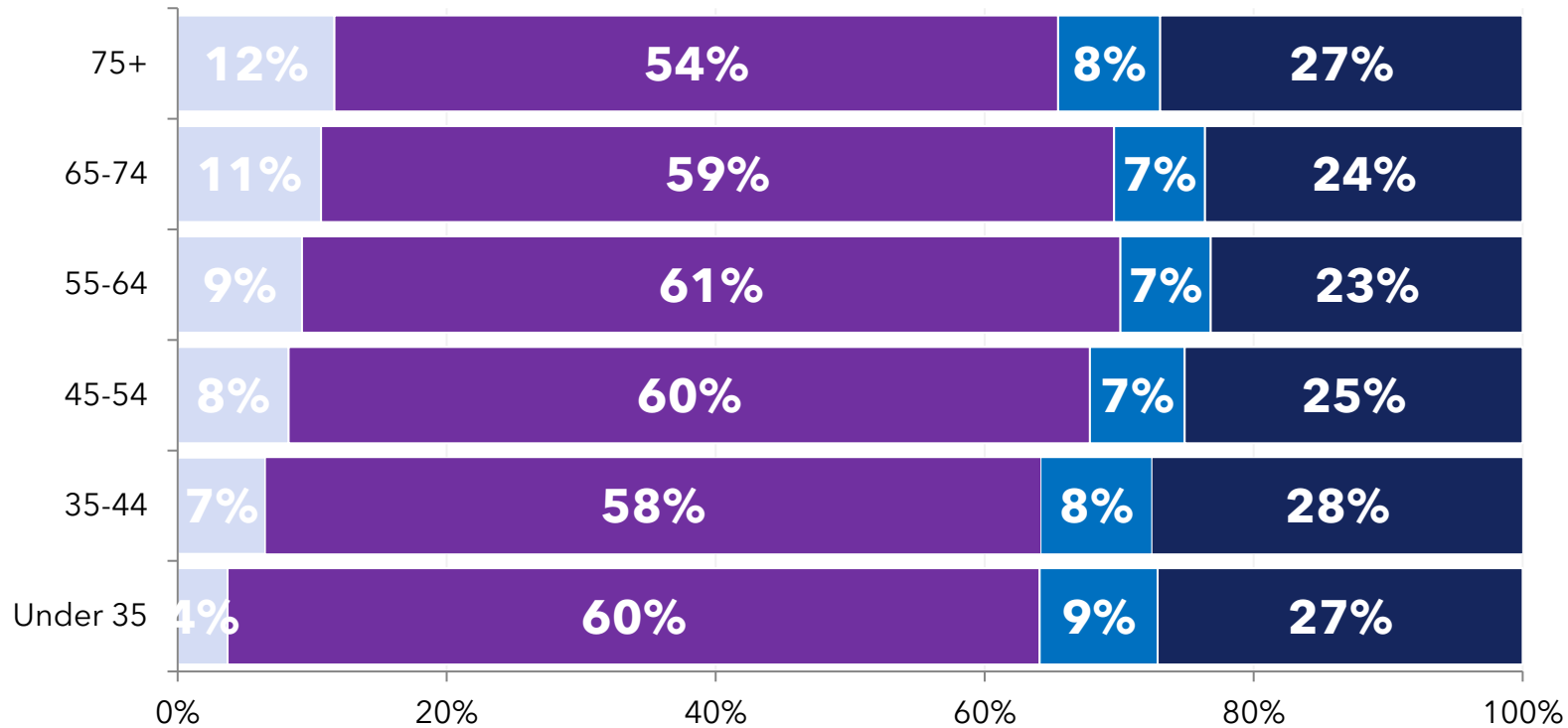
## DIGITAL CULTURE VS IN PERSON ATTENDANCE

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

October n = 3,243	February n = 3,838
November n = 4,335	March n = 9,187
December n = 3,066	April n = 4,563
January n = 3,618	May n = 4,223

# 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



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## DIGITAL CULTURE VS IN PERSON ATTENDANCE

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

April & May responses:

Under 35 n = 376; 34-44 n = 751;  
45-54 n = 1,420; 55-64 n = 2,454;  
65-74 n = 2,732; 75+n = 883

# Interest in digital culture in future



## DIGITAL INTEREST

THOSE INTERESTED OR VERY INTERESTED IN DIGITAL IN FUTURE FELL SLIGHTLY FROM 42% IN JANUARY TO 34% IN MAY



## DIGITAL IN FUTURE

25% 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?

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- GRANULAR SEGMENTATION

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RESPONSES DASHBOARD

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