



# Culture Restart: Disabled and Vulnerable Audiences

**A research summary by Morwenna Collett - March 2021**

**Culture Restart Audience & Visitor Tracker**

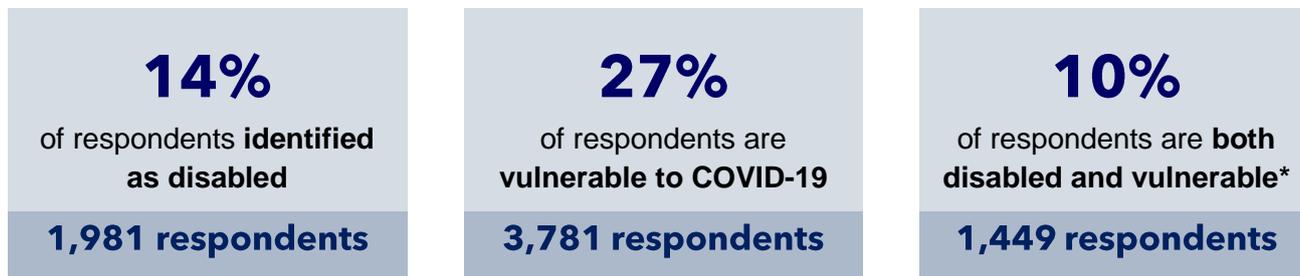
Baseline period – October to December 2020



Morwenna Collett is a disabled musician and arts consultant, specialising in diversity, access and inclusion. Based in Sydney, Australia, she has held leadership roles at the Australia Council for the Arts and Accessible Arts and has worked with a wide range of organisations across all art forms.

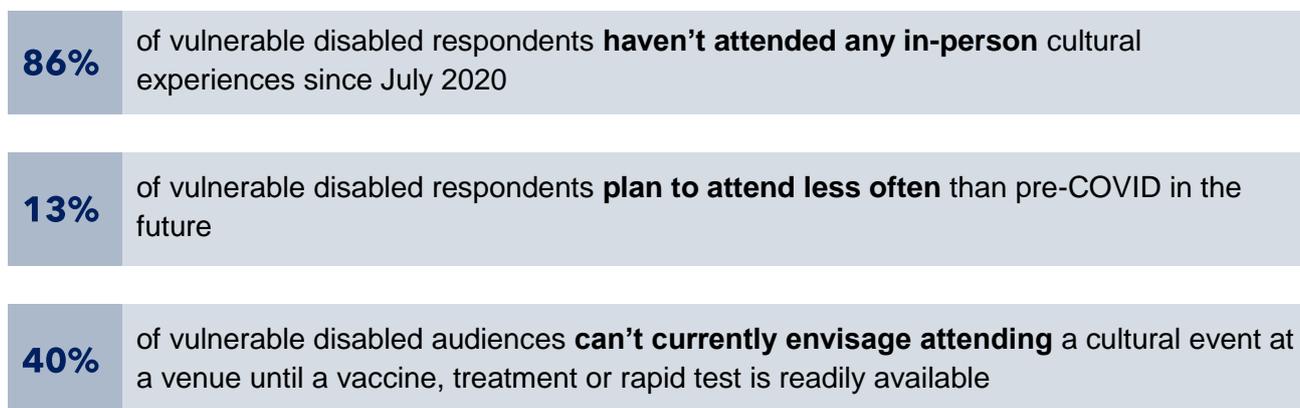
Morwenna provides strategic advice, training and other support to arts organisations to help them increase their inclusivity and engagement with people from diverse backgrounds, including disabled people. More information at [www.morwennacollett.com](http://www.morwennacollett.com).

# Disabled and vulnerable audiences - headline findings

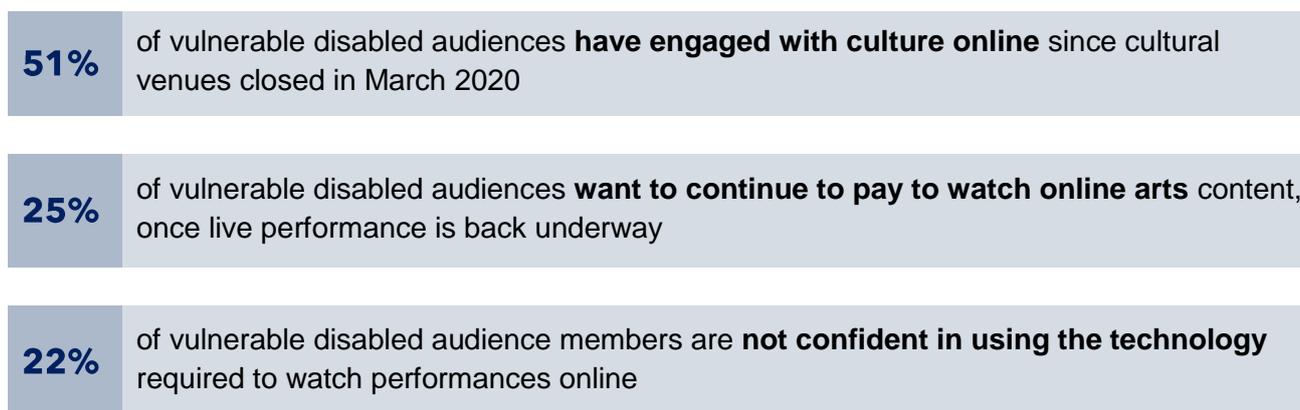


\*Referred to in this report as 'vulnerable disabled audiences'

## Returning to cultural experiences



## Online culture



# Background

## Culture Restart Toolkit

This summary shares some reflections on the survey responses from disabled and vulnerable audience members to the ongoing Culture Restart Audience & Visitor Tracker research in the UK, made during the baseline period of October to December 2020.

The **Culture Restart Toolkit** is delivered by Indigo, Baker Richards and One Further, three prominent UK consultancies. It builds on Indigo's previous surveys, *After the Interval* (April – May 2020) and *Act 2* (June – July 2020), which were used to inform business planning and audience strategy in cultural organisations across the UK, and has been used to lobby government.

This survey examined audiences' willingness to return to live in-person arts events, as well as their interest in engaging with culture online and their willingness to pay for it. While a small number of questions have been identical in each of the three surveys, the focus of this research summary is specifically on the most recent data from the Culture Restart survey.

Responses from disabled audience members have been examined previously by Andrew Miller in [a report](#) which focused on results from the *Act 2* survey.

The Culture Restart Audience & Visitor Tracker research is ongoing, with cultural organisations sending the survey out to the same segments of their audience on a monthly basis in order to track how responses are changing over time. The data gathered during the October to December 2020 period has been used as the 'baseline' dataset and includes responses only from the first time the survey was sent out by each organisation during that period. There were **11,833 responses** from **42 participating organisations**.

For more information about Culture Restart, visit [www.indigo-ltd.com/culture-restart-toolkit](http://www.indigo-ltd.com/culture-restart-toolkit)

## Disabled and vulnerable audiences

This research summary identifies insights from Culture Restart data from disabled audience members and those who are vulnerable to COVID-19. This includes survey respondents who responded 'Yes' to the question "Do you identify as a D/deaf or disabled person, or have a long-term health condition?" and/or "Would you currently regard yourself as a 'vulnerable' person in relation to Coronavirus?" 14% of these respondents self-identified as disabled and 27% as vulnerable to COVID-19.

Respondents who answered yes to both of these two questions are referred to in this report as “vulnerable disabled audiences”. In total, 10% of the 11,833 identified as both disabled and vulnerable. Where relevant, comparisons have been made to audiences who are neither disabled nor vulnerable to COVID-19 (those who selected ‘No’ to both disability and vulnerability questions) who are referred to in this report as “non-disabled/vulnerable”. For the purposes of this survey, people self-defined as vulnerable (no specific definition was used). While there is some overlap between those who identify as both disabled and vulnerable, there are responses from disabled people who don’t define themselves as vulnerable (27% of disabled audiences), and also vulnerable people who don’t identify as disabled (62% of vulnerable audiences).

Within the vulnerable disabled group, 53% of respondents are 65 years of age or over (not surprisingly with 64% of vulnerable respondents identifying with this age category). 0.2% of this group identified as Black or Black British (compared to only 0.1% of our non-disabled/vulnerable group), with the vast majority of both groups identifying as white British.

### **A note on language and terminology**

We recognise that the language and terminology used around disability is vast, evolving and very personal for some people. It also varies from country to country. This summary report uses the phrase “disabled audiences” to refer to anyone who answered yes to the question “Do you identify as a D/deaf or disabled person, or have a long-term health condition?” However, it also uses the phrase “audiences with disability” to refer to this group of Australian audiences.

Please note that when we refer to ‘groups’, we are referring to vulnerable disabled audiences as one group and non-disabled/vulnerable audiences as another group.

# Research findings

## Pre-COVID

### **Vulnerable disabled audiences had similar pre-COVID patterns, habits and interests to non-disabled/vulnerable audiences**

The vulnerable disabled group showed similar results to the non-disabled/vulnerable audience group when it came to pre-COVID attendance at events. The majority of those surveyed in both groups **attended 4+ events per year**, followed in order by 2-3 events, once a year and less than once a year. Artform preference was the same for both groups as well, with the most popular artform being musical theatre, followed closely by Rock/Pop/Jazz/World music, then by cinema/film and then by drama.

Both groups were **most likely to attend events with a spouse/partner**, with the most likely companion being friends. However, while 1 in 2 non-disabled/vulnerable people regularly attended with friends, only 2 in 5 of the vulnerable disabled group attended events with friends pre-COVID.

### **Vulnerable disabled audience members are more interested in the best seats, rather than the cheapest seats**

In answer to the question on how much they would typically pay to attend a cultural event, **30%** of vulnerable disabled audiences answered 'Yes' to "I usually buy best available tickets regardless of price" compared to only **25%** of non-disabled/vulnerable audiences. Non-disabled/vulnerable people were more likely to select "I usually search around for the best value tickets." However, since COVID, many people in both groups have had changes to their circumstances and reduced income, impacting their ability to purchase tickets now and in the future.

# Current behaviour

## Vulnerable disabled audiences are less likely to have attended events since March 2020

In answer to the question “Have you attended (in person) any cultural events, activities or venues since some cultural organisations began to re-open?” **86%** of vulnerable disabled audiences said ‘No’ compared to **73%** of non-disabled/vulnerable audiences.

The most common reasons vulnerable disabled audiences gave for not having attended events were **desire to avoid crowds** – with **75%** selecting this option compared to **48%** of non-disabled/vulnerable audiences – and **reluctance to travel** to events at **29%** compared to **17%**. Although there was a period of relaxation in 2020 when some cultural organisations in the UK opened, mostly for outdoor events, the data suggests that the majority of vulnerable disabled audiences **remained in a state of lockdown**. With **25%** of vulnerable disabled audiences saying there had been a **lack of opportunities to attend**, arts organisations may not have been prioritising the delivery of accessible performances during the pandemic – something we need to do better at as a sector generally and be mindful of as venues reopen in 2021.

In terms of what people are attending, the most popular types of events that vulnerable disabled audiences have attended are cinema/film, heritage site/property/gardens and classical music. Having said that, of the vulnerable disabled respondents who attended events, only **35%** had attended cinema/film, compared with **45%** of non-disabled/vulnerable people.

## Vulnerable disabled audiences are continuing to support the arts, including philanthropically, where they can

Many members of community have been conscious of the massive financial impact the pandemic has had on the arts industry. Vulnerable disabled audiences are no more likely than non-disabled/vulnerable audiences to have had their income reduced as a result of COVID-19, and interestingly, this group has in fact been **more likely to set up regular giving** to arts/cultural organisations during this time (**7%** of vulnerable disabled respondents, compared to **5%** of non-disabled/vulnerable respondents).

Everyone’s circumstances are of course different. Whilst one disabled audience member said they were “happy to continue donating to a selection of arts organisations”, another said “I don’t have the money to buy tickets or donate just now.”

# Planning to return to events

## Vulnerable disabled audiences are more cautious around booking

Vulnerable disabled audiences are **more cautious about booking for future events**. In answer to the question “Have you booked for any cultural events or activities SINCE venues closed in March that you haven't yet attended?”, **76%** of vulnerable disabled audiences said ‘No’ compared to only **66%** of non-disabled/vulnerable audiences.

Vulnerable disabled audiences feel more compelled to book when there is **the ability to return tickets** (59%), **exchange tickets** (39%) or **purchase ticket insurance** (23%). Again, the desire to avoid crowds and reluctance to travel have more heavily influence vulnerable disabled audiences’ decisions not to book events for the future, than compared with the influence this has on non-disabled/vulnerable people’s decision making.

## Booking events may be some way off yet for many vulnerable disabled audience members

When asked when they might feel ready to start booking for events, **only 3%** of vulnerable disabled respondents who hadn’t yet booked said they would feel ready to book events in the next month, compared to **13%** of non-disabled/vulnerable respondents, with **5% not planning to book at all** (compared to 2% of non-disabled/vulnerable audiences responding this way). **42%** of vulnerable disabled audiences said they weren’t sure when they will book an event again, compared with only **30%** of non-disabled/vulnerable audiences.

When asked which statement best fit how they were feeling about returning, **40%** of vulnerable disabled audiences chose “I cannot currently envisage attending a cultural event at a venue until a vaccine, treatment or rapid test for COVID-19 is readily available”, compared to only **16%** of non-disabled/vulnerable audiences who responded this way. The majority of the non-disabled/vulnerable group chose “I would consider coming to a cultural event in a venue if I felt sufficiently confident that the required social distancing and hygiene measures had been put in place.”

*“I am looking forward to visiting the museums and art gallery but will not be going until 6 weeks after I have been given the first dose of the vaccine. I will not buy theatre tickets for shows in 2021.”*

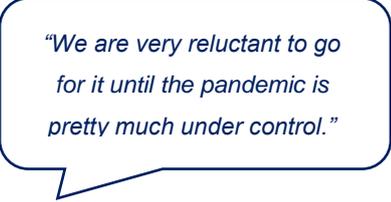
*“We are really looking forward to attending live events in the future once mass vaccination is well underway. One of us is in the shielded group therefore we would need to feel very comfortable with the safety measures in place and confident that the organisation responsible will ensure that these are complied with. We appreciate that this will take a while for our confidence to grow particularly with indoor events.”*

# Future attendance

## Vulnerable disabled audiences are anticipating attending events less often than pre-COVID

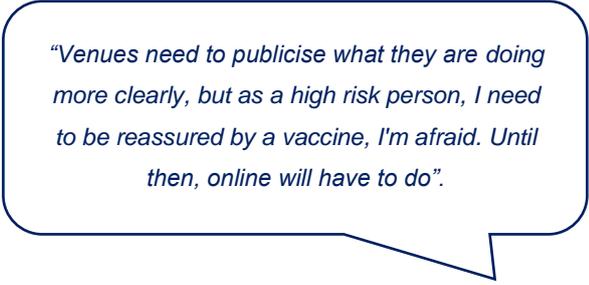
While the majority of survey respondents in both groups thought that they would attend live events about the same amount as they did pre-COVID (once they felt comfortable/safe to return), vulnerable disabled audiences were **more likely** than non-disabled audiences to indicate that they **would attend events less often** than they were pre-COVID (**13%** compared to **9%**). In terms of expenditure on events, both groups plan to spend about the same on events in the future.

Age also plays a factor here, with one 89 year old vulnerable disabled respondent saying:



*"We are very reluctant to go for it until the pandemic is pretty much under control."*

Another vulnerable disabled respondent highlighted the **importance of safety measures**, saying:



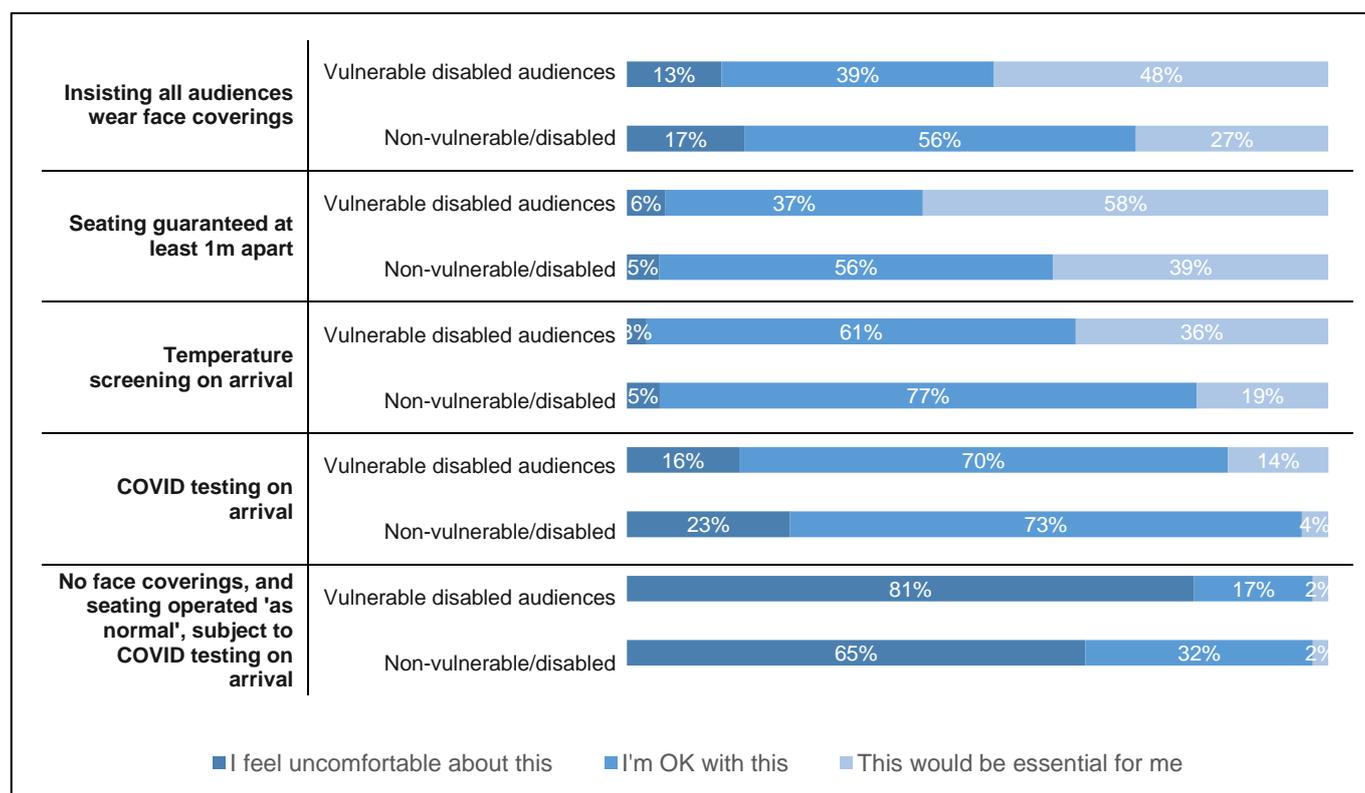
*"Venues need to publicise what they are doing more clearly, but as a high risk person, I need to be reassured by a vaccine, I'm afraid. Until then, online will have to do".*

## Safety and hygiene measures are even more important to vulnerable disabled audiences

Respondents were asked to say how they felt about certain health and safety measures being considered or implemented by cultural audiences. The responses showed that vulnerable disabled audiences were **much more likely** than their non-disabled/vulnerable counterparts to say that particular measures being in place were **essential for their return**, including **face coverings (48%** of vulnerable disabled audiences said this was essential compared to **27%** of non-disabled/vulnerable), **socially distanced seating (58%** compared to **39%**) and **temperature checks on arrival (36%** compared to **19%**).

While the majority of respondents in both groups were uncomfortable with the idea of attending a cultural event with no restrictions in place subject to COVID testing on arrival, this was particularly true of vulnerable disabled audience members, with **81%** of them saying "I feel uncomfortable about this" compared to **65%** of non-disabled/vulnerable respondents.

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



# Online arts experiences

## Vulnerable disabled audiences have a longer history with engaging in the arts online

Vulnerable disabled audiences were **more likely to have engaged with digital arts content** before and since cultural venues closed (**20%** compared to **17%**), whereas non-disabled/vulnerable audiences were more likely to have only engaged this way since venues closed (**37%** compared to **30%**). Of those who had engaged online, the majority of respondents in both groups had done so **4+ times** since March 2020 (**57%** of the vulnerable disabled group and **48%** of the non-disabled/vulnerable group).

## Online talks and virtual gallery/museum tours are popular amongst vulnerable disabled audiences

For both groups, the most common online engagements included **events specifically created to be viewed online, livestreams** and **archive recordings/footage**. Vulnerable disabled audiences were more likely to have viewed online talks/lectures (**46%** compared to **40%**) and virtual guided tours of museums/galleries (**28%** compared to **19%**).

In terms of the future, **41%** of vulnerable disabled audiences say they **are interested or very interested** in engaging in digital content in the future, with particular interest in performances or events specifically created to be watched online (**72%**), livestreams (**68%**) and archive recordings.

## Online arts experiences will continue to be important into the future, however inequalities in accessing online content do exist

As we re-build and work towards recovery, it is important to vulnerable disabled audiences that we **don't lose the online access to arts and culture** that we have seen develop and grow during the pandemic.

Even once we are comfortably back to attending live performances in person, **25%** of vulnerable disabled people have said "I'd also engage with and pay for events online" and **57%** said "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".

Viewing content online **removes potential barriers** created by issues such as inaccessible venues or transport options. One vulnerable disabled audience member explained:

*“As a wheelchair user with various disabilities my cultural world has opened up since COVID and the online opportunities offered. It will be terrible if we go back to a world where many events were not available to me because of physical access barriers. We need to look for a new way of operating where a variety of opportunities are available to all.”*

Having said that, we need to be mindful to the **range of barriers that people can face** to accessing artistic content online. For the vulnerable disabled group, key barriers included confidence using technology (with **22%**, compared to **8%** of non-disabled/vulnerable audiences, experiencing this issue), sound/picture quality on home equipment and of course internet/broadband access and speed. This is illustrated by these quotes from disabled audience members:

*“My success in attending an online event has been very uncertain, particularly those that are live streamed and/or interactive because I am sight impaired, and perhaps not fully confident in my IT skills. It can be very frustrating.”*

*“I use hearing aids and find it difficult to hear a lot of online stuff.”*

*“I have very unreliable broadband at home which limits my engagement with digital culture.”*

*“I would like to learn how to access performances online. Not everyone is internet savvy.”*

## An international comparison

Versions of these sorts of surveys have taken place in several other parts of the world over the last 12 months. In Australia, a research agency specialising in culture, creativity and community called [Patternmakers](#), has delivered several phases of the 'COVID-19 Audience Outlook Monitor' (in partnership with WolfBrown). In November 2020, they released a '[Disability Fact Sheet](#)'<sup>1</sup> around the Phase 3 data from their Audience Outlook Monitor. It's interesting to see the similarities and differences between the research in Australia and the research in the UK, when it comes to disabled audiences. The current response to COVID-19 is different in the two countries, with much of the UK currently in lockdown and restrictions much more relaxed in Australia (with only limited restrictions in place and many venues open at the end of 2020). The wording of the questions reflects these differences, making direct comparisons difficult.

Despite being a smaller country, the Australian survey had a similar number of respondents (12,147 responses, compared with 11,833 Culture Restart responses), however a much smaller percentage of disabled respondents (657 or 5% compared with 1,981 and 14%). The Australian survey only asked about whether someone identified as disabled, and not whether they identified as vulnerable.

In Australia in September 2020, when the research was carried out, audiences with disability are expressing slightly more caution attending venues, compared to those without disability. Attitudinally, the proportion of audience members who feel 'ready to attend' cultural events (26%) is slightly smaller than the national average (29%). Australian audiences with disability are most favourable to digital arts and culture programs, where they can watch from home (47% ranked this as their first preference).

The largest proportion of Australian audiences with disability are returning to museums and galleries (12%) and cinemas (11%), which are the most common types of facilities to be open consistently. Slightly fewer attended a live performance (8%) or a lecture, artist talk or workshop (8%).

Similarly in the UK, during a period of lockdown relaxation when some audience members returned to in-person cultural events, the most common types of venues and activities that vulnerable disabled audiences have attended were cinema (35% of those who returned), art galleries (34% of those who returned) and heritage site/property/gardens (34% of those who returned).

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<sup>1</sup> Disability Fact Sheet – COVID19 Audience Outlook Monitor, Patternmakers, (Australia, November 2020). Accessed [here](#).

Interestingly, in Australia, audiences with disability are more likely to be making plans to attend an event, of some kind, in future. Almost half (48%) report that they made plans within the fortnight before data collection, slightly higher than audiences without disability (44%). However in the UK, the majority (42%) of vulnerable disabled audiences have said they are not sure when they will be ready to start booking events again. This is of course also a reflection of the current state of the virus and cultural activities currently available in each location. In Australia, audiences with disability are booking with shorter lead times than audiences without disability (54% are booking less than one month out, compared to 51% of audiences without disability).

Disabled audiences in both countries are engaging in online content. In Australia, online engagement in arts and cultural activities is higher among audiences with disability (80%) compared to those without disability (70%). Digital streaming is the most preferred option for audiences with disability with 47% of them selecting live streamed digital program as their most preferred option. 51% of UK vulnerable disabled audiences have engaged in digital content since the start of the pandemic. In addition to questions relating to audience attendance at live or digital events, the Australian survey also enquired about people's interest in creatively engaging online (e.g. through workshops, classes, lessons etc). At home in Australia, creative participation in arts and cultural activities is slightly more common among audiences with disability, compared to audiences without disability.

In both countries, disabled audiences are slightly less optimistic about returning to events long-term. In Australia, audiences with disability showed slightly less optimism about returning to events long-term, with 27% saying they expect to attend less than before, 65% saying they will attend the same amount and 7% saying they will attend more than before. This seems to be less of an issue in the UK, with 13% of vulnerable disabled audiences saying they will attend less often than before, 75% about the same and 12% more often.

For more information about the Australian research, please see the COVID-19 Audience Outlook Monitor [here](#).

## What next?

So what does all this mean for arts industry as a whole, as we work towards recovery? And how do we ensure we build back better for everyone?

It's going to take a while until we see both disabled and vulnerable audiences flock back to live events in venues, and seeing them do so in the numbers we've seen in the past will be unlikely for some time. There is a clear demand for continued digital content, even once live events fully return.

However, as Andrew Miller said some months back – “I would suggest significant inducements be prepared to re-engage disabled audiences”<sup>2</sup> – we're going to need a plan.

Luckily, [#WeShallNotBeRemoved](#) (a recently formed UK Disability Arts Alliance consisting of over 400 members), in partnership with Ramps on the Moon, Attitude Is Everything, Paraorchestra and What Next?, has developed and shared [7 Principles to Ensure an Inclusive Recovery](#), a new guide for the arts and entertainment sectors to support disability inclusion and to ensure Deaf, neurodiverse and disabled people are not discriminated against as creative work begins again and venues re-open.

**It is hoped that all arts and cultural organisations use this information to work towards an inclusive and accessible recovery for everyone.**

## Latest findings

The Culture Restart Audience & Visitor Tracker has been ongoing since October 2020, with results being released in waves. For the latest results visit [indigo-ltd.com/blog](https://www.indigo-ltd.com/blog) or browse the data in the [interactive dashboard](#) which has the ability to filter by criteria including disabled or vulnerable status.

The Culture Restart Toolkit is free to use, and cultural organisations in England, Scotland and Wales can join at any time. For more information visit [www.indigo-ltd.com/culture-restart-toolkit](https://www.indigo-ltd.com/culture-restart-toolkit)

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<sup>2</sup> Andrew Miller, “Slump in disabled audiences’ confidence presents major problem for the arts sector” 3 July 2020. Accessed at <https://www.indigo-ltd.com/blog/act-2-confidence-of-disabled-audiences>

# About us

## **Morwenna Collett**

Morwenna Collett is a disabled musician and arts consultant, specialising in diversity, access and inclusion. Based in Sydney, Australia, she has held leadership roles at the Australia Council for the Arts and Accessible Arts and has worked with a wide range of organisations across all art forms.

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## **About Indigo Ltd**

Katy Raines is regarded as one of the UK's leading consultants on CRM and Segmentation for the Arts, and as such has developed and led research and implementation programmes for large and middle scale organizations throughout the UK. She has a particular passion for using audience data to effect change, and drive an audience-led approach to marketing for any arts organisation.

## **About Baker Richards**

Baker Richards is a leading international provider of consulting services and software for the cultural sector. Areas of expertise include admissions pricing, segmentation, memberships, subscriptions and donations, sales forecasting and primary research. Based in Cambridge, since early 2020 the company has been employee-owned.

## **About One Further**

One Further is a digital analytics and user research consultancy based around London and working internationally. One Further's CEO and founder Chris Unitt is co-chair of the Museum Computer Network's Data & Insights Group, and is often invited to write and speak about digital analytics and user experience. He's spoken at events for the Arts Marketing Association, Museums Association, Ticketing Professionals Conference, Spektrix, and MuseumNext.