



CULTURE
RESTART

Culture Restart
Latest Findings & Digital Focus webinar

23 February 2021

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CULTURE
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Culture Restart audience tracker

Wave 4

January 2021

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Live in 66 minutes

23 February, 14:00

Set reminder

Culture Restart: Latest Findings & Digital Focus

Top chat

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

LEARN MORE

Chris Unitt

Say something...

0/200

HIDE CHAT

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2

Today's speakers

CULTURE
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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

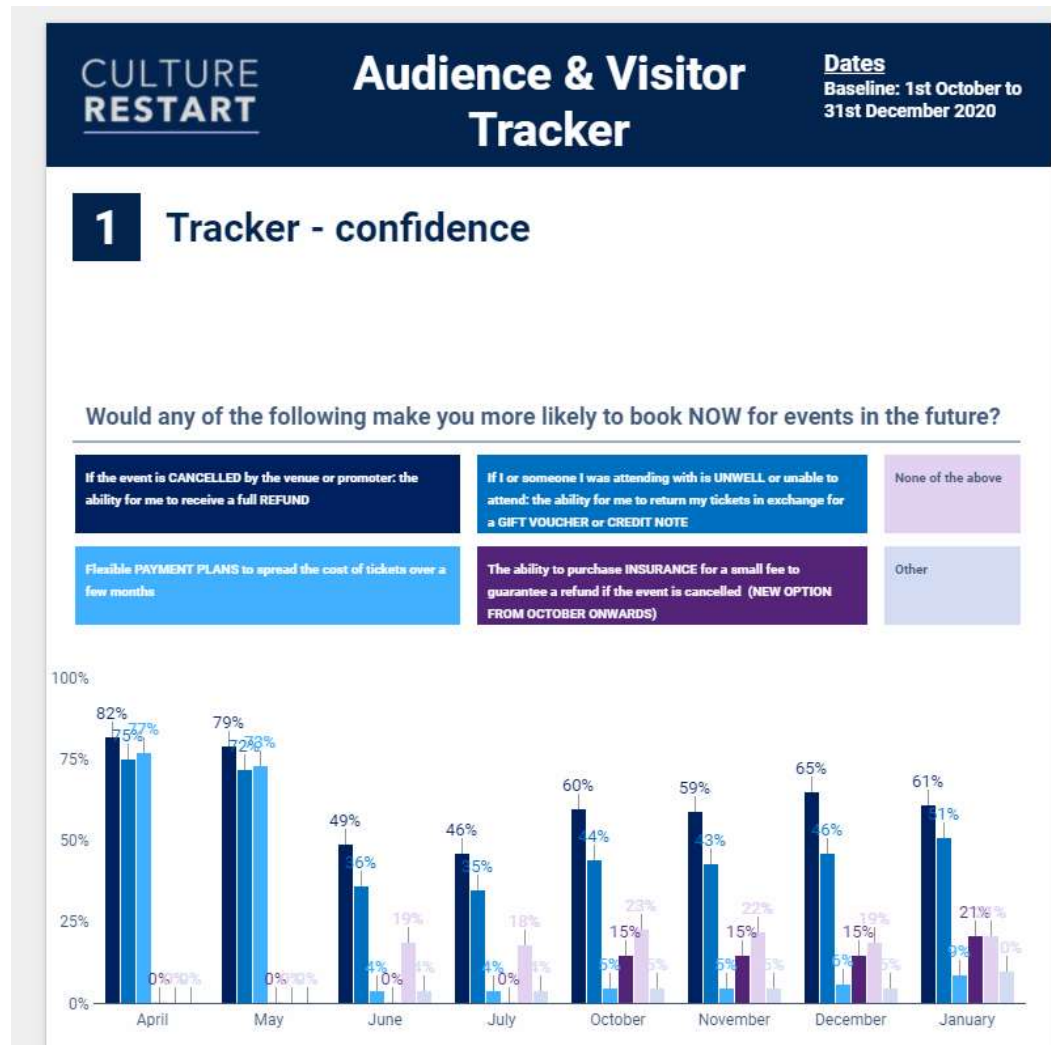
Digital Experience Survey

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

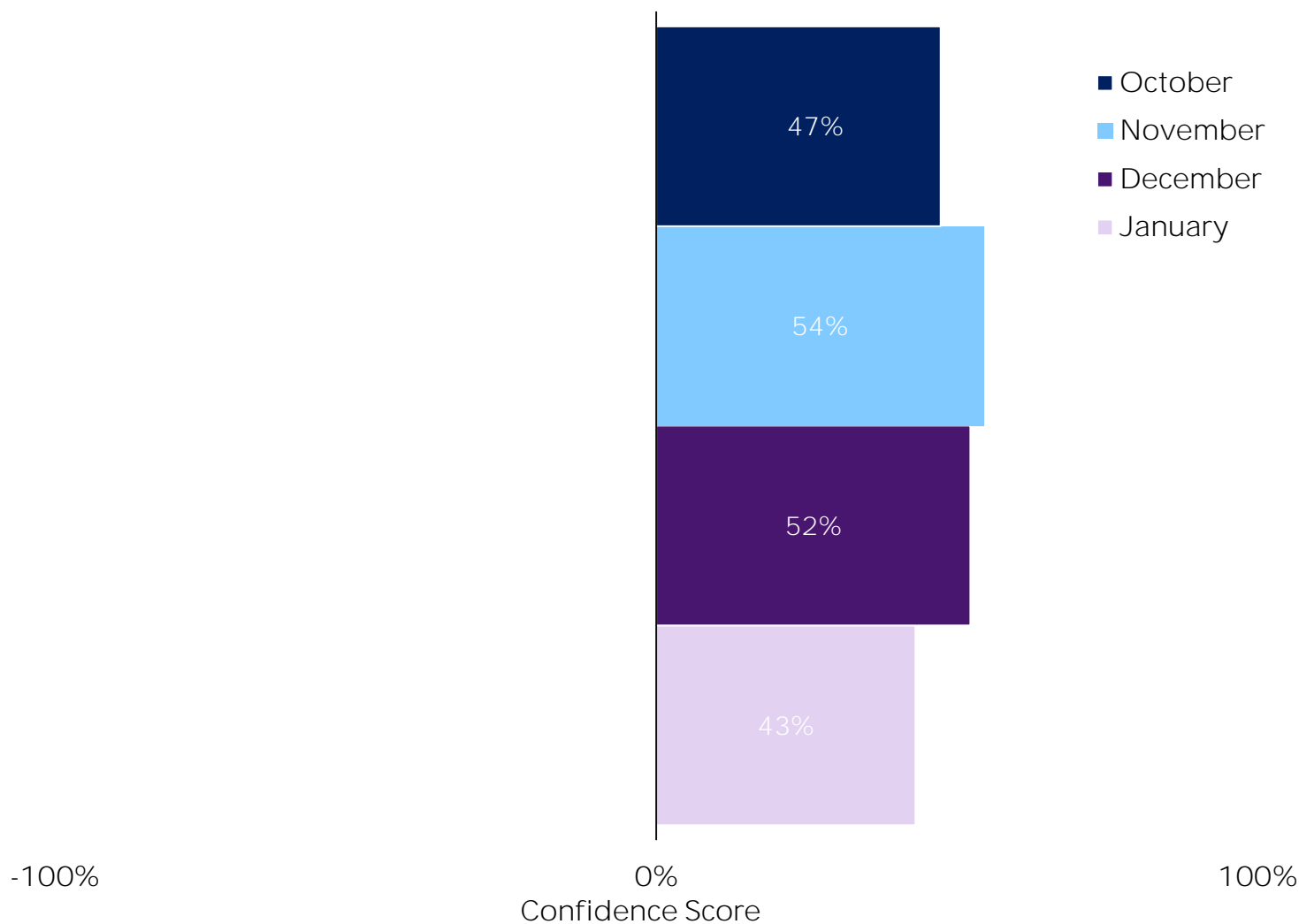
Latest Findings

JAN 2021



Audience confidence levels

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



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

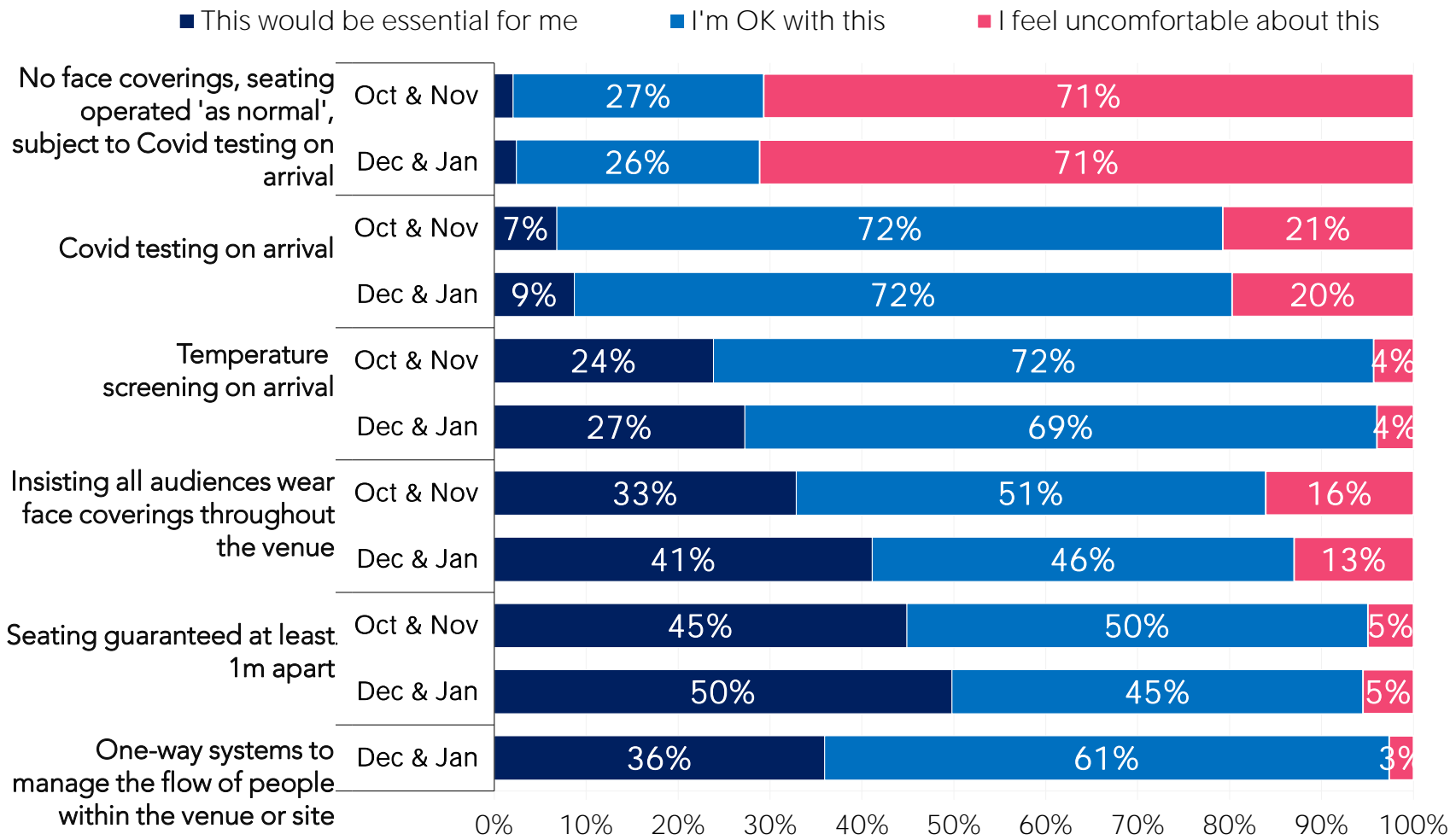
Latest Findings

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

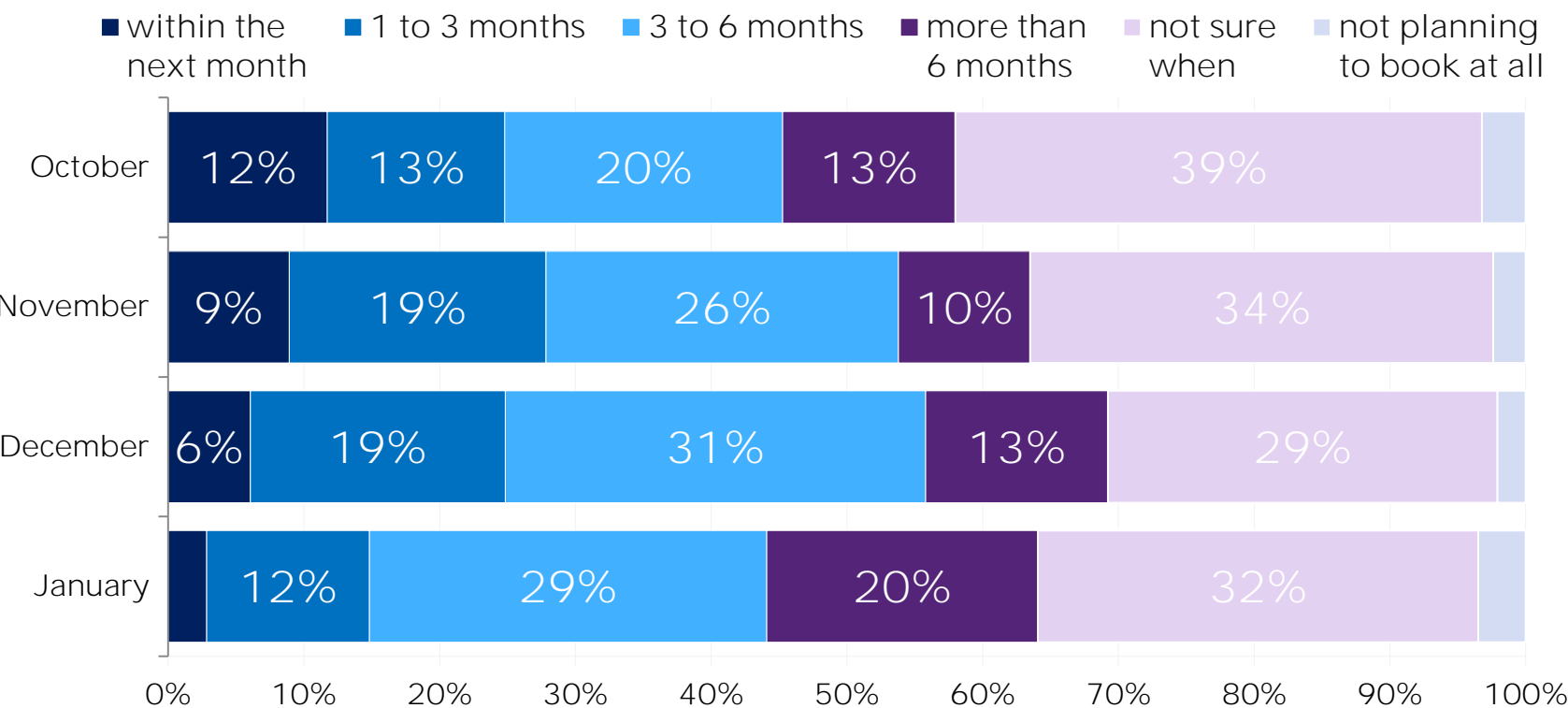
Latest Findings

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

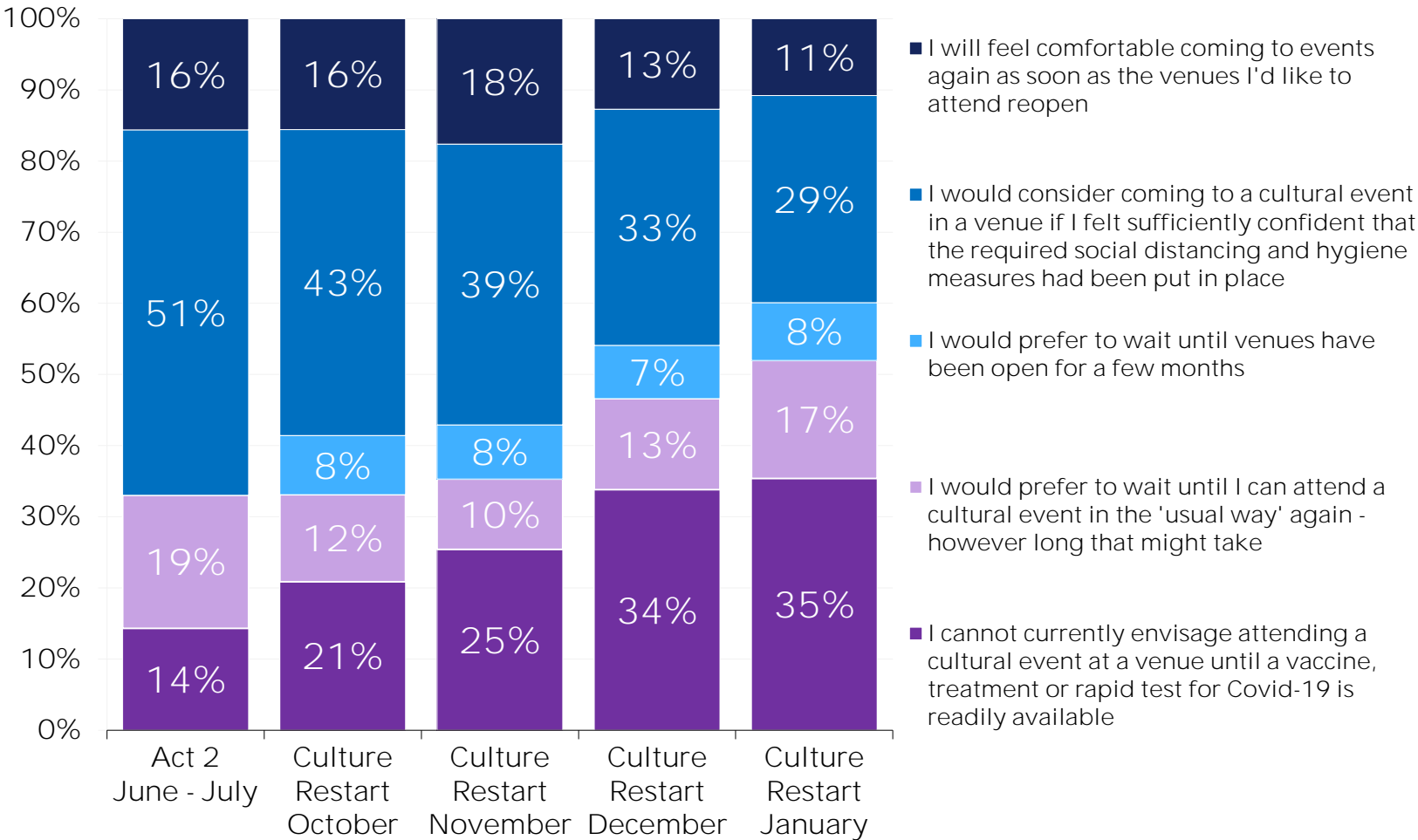
Latest Findings

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.

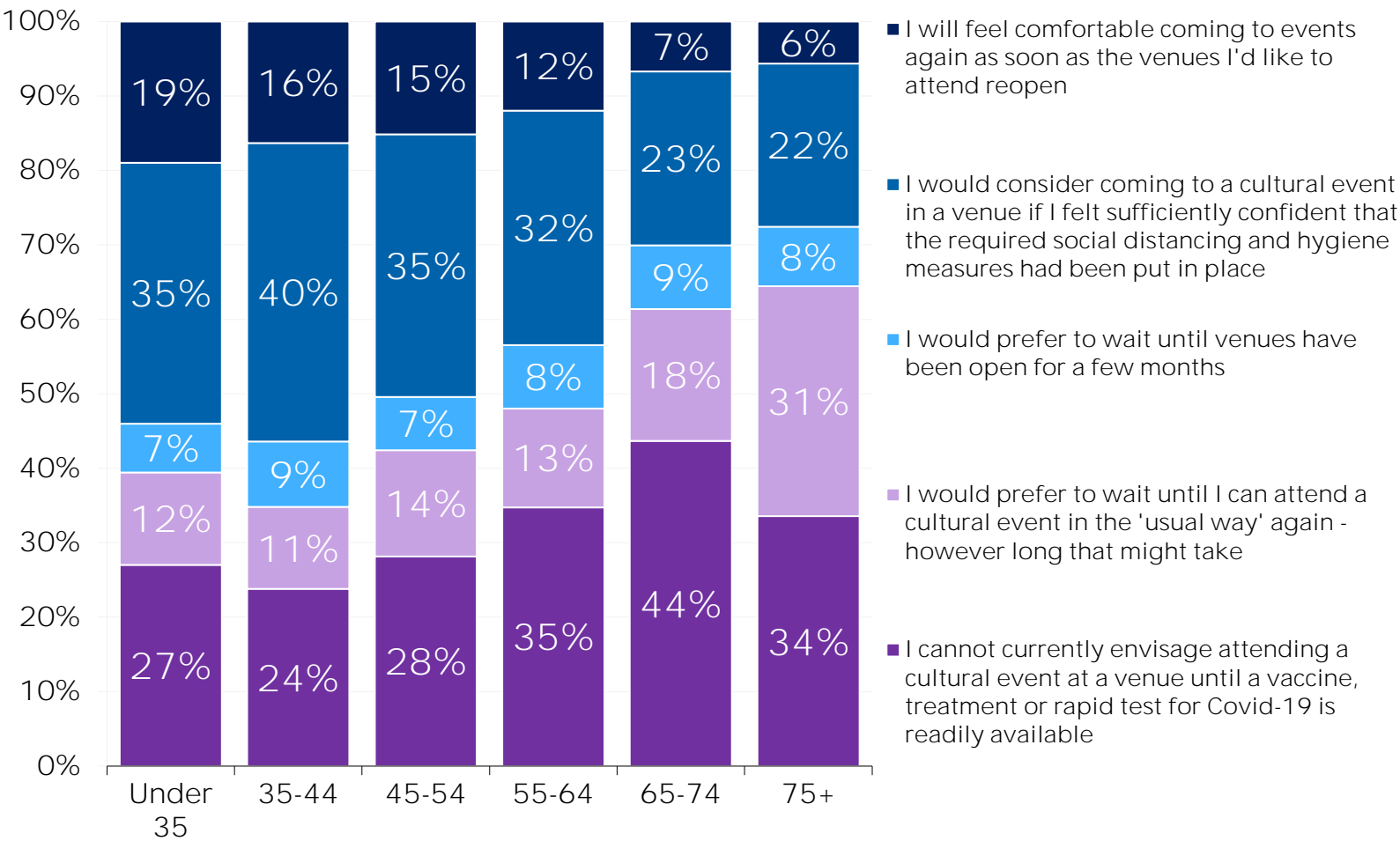


RETURNING TO EVENTS

- 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.

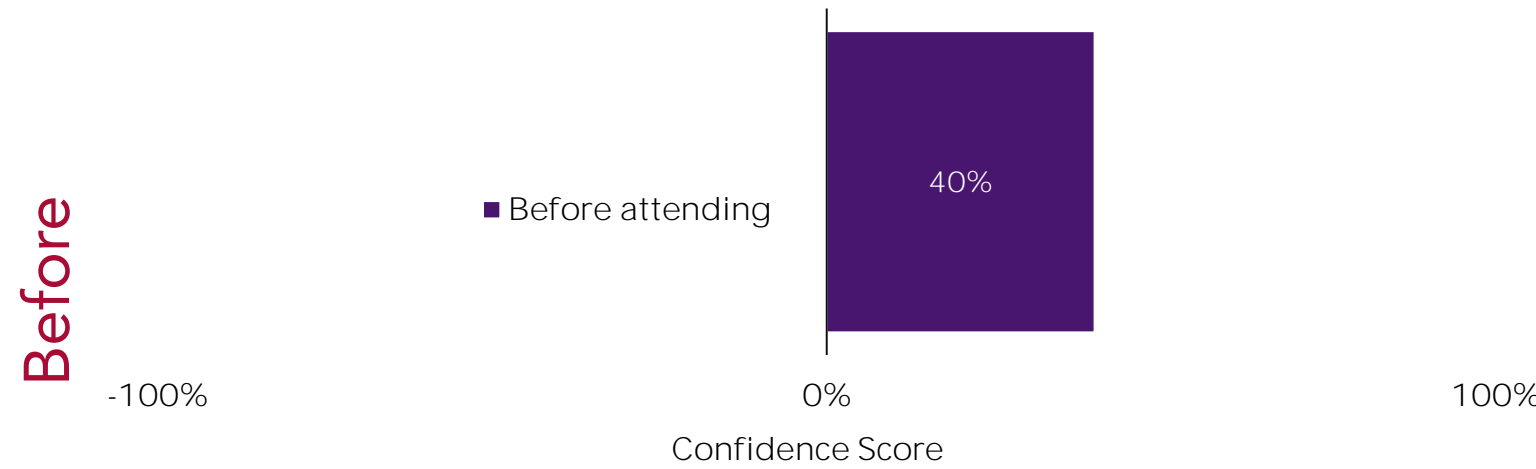


RETURNING TO EVENTS

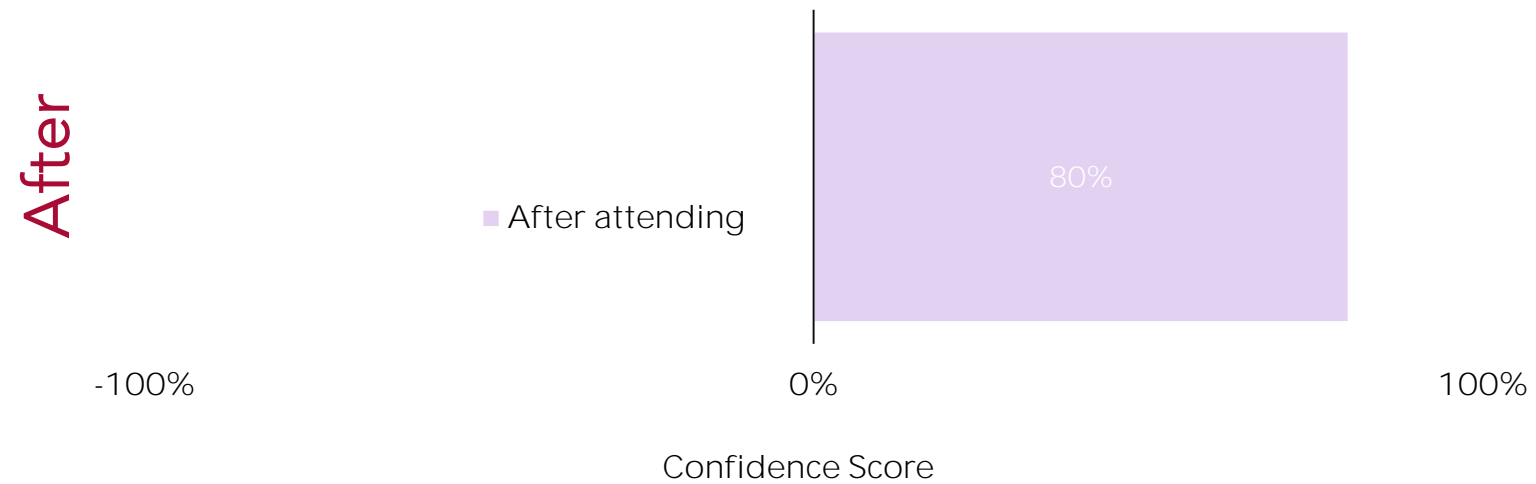
- The proportion waiting for a vaccine increases with age.
- However, 31% of the oldest group (who are most likely to have been vaccinated) now want to wait until they can attend **in the 'usual way'**

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?



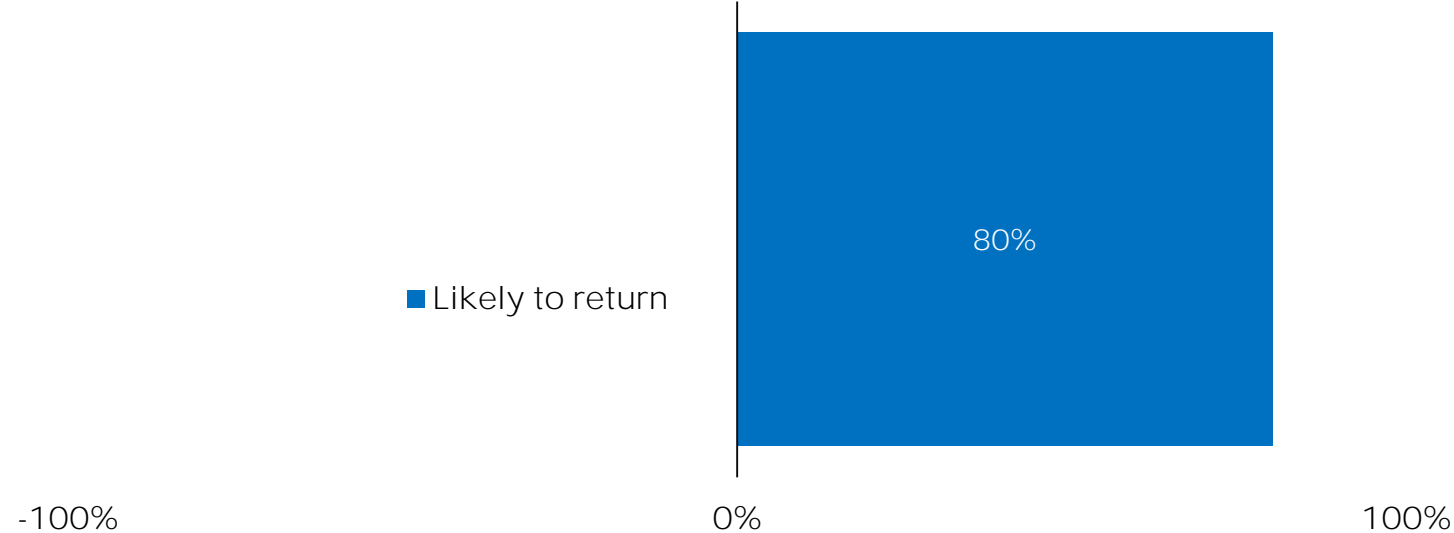
How did you feel immediately after your visit?



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?

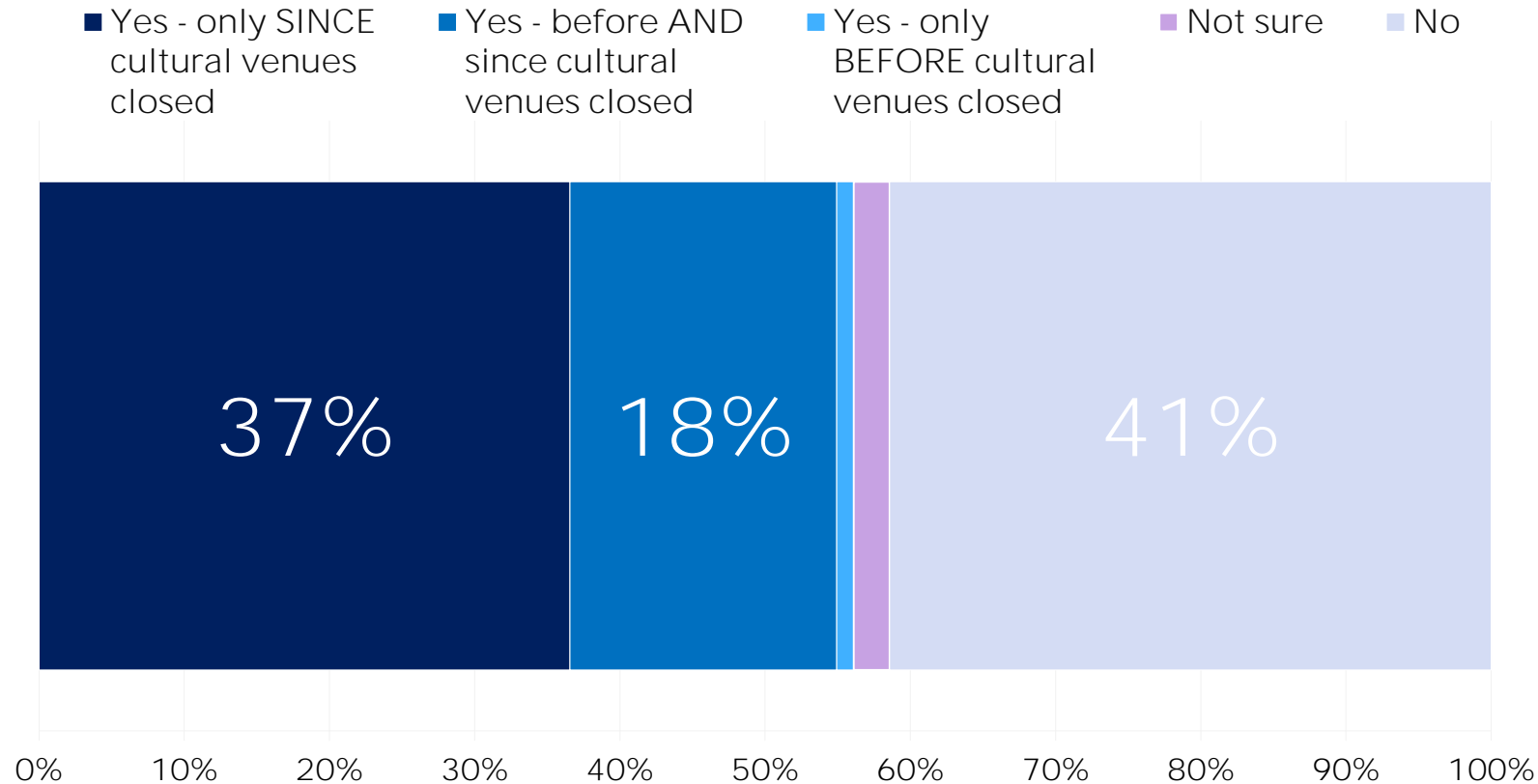


CONFIDENCE

- 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?



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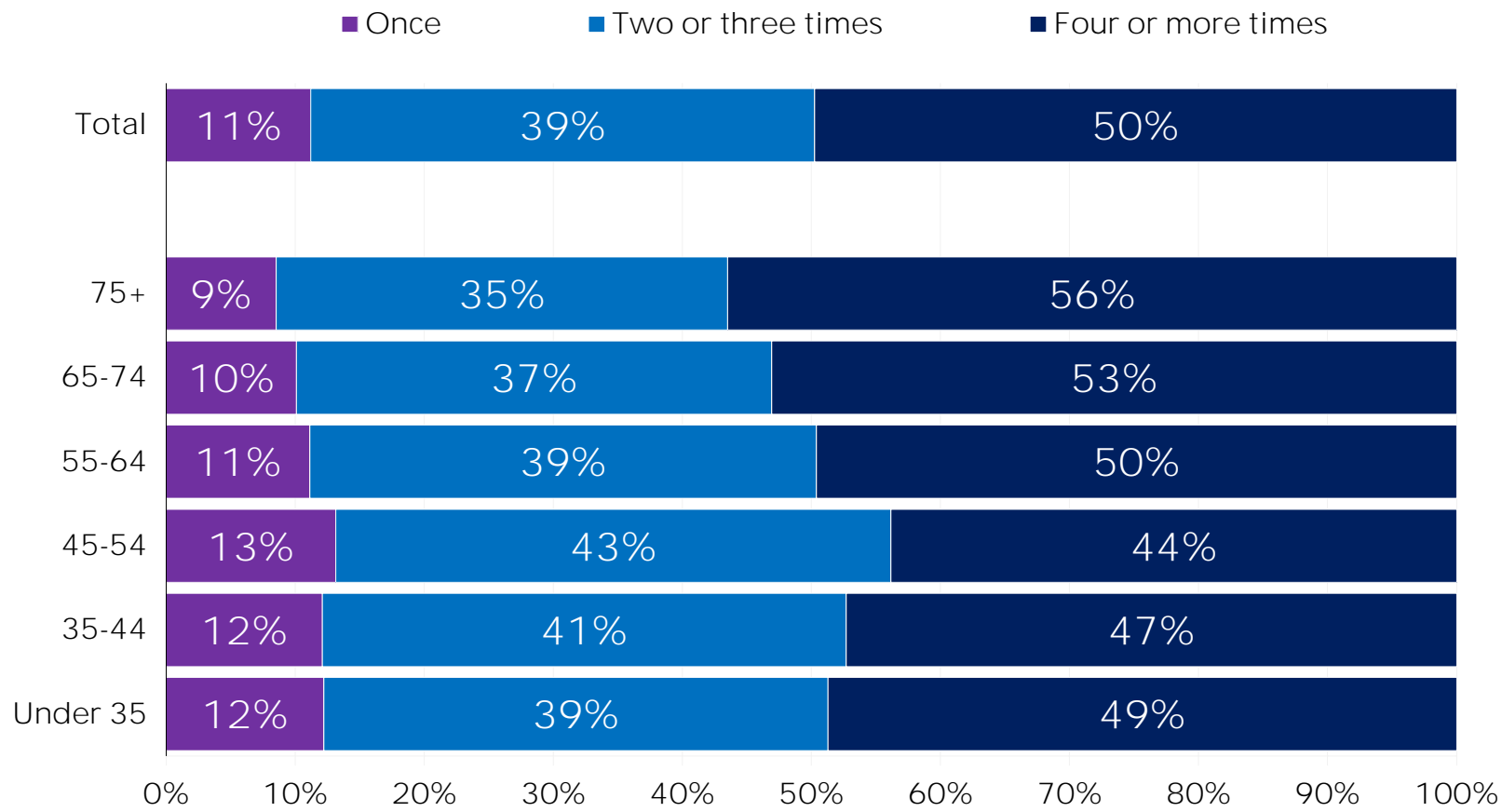


DIGITAL ENGAGEMENT

- 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?

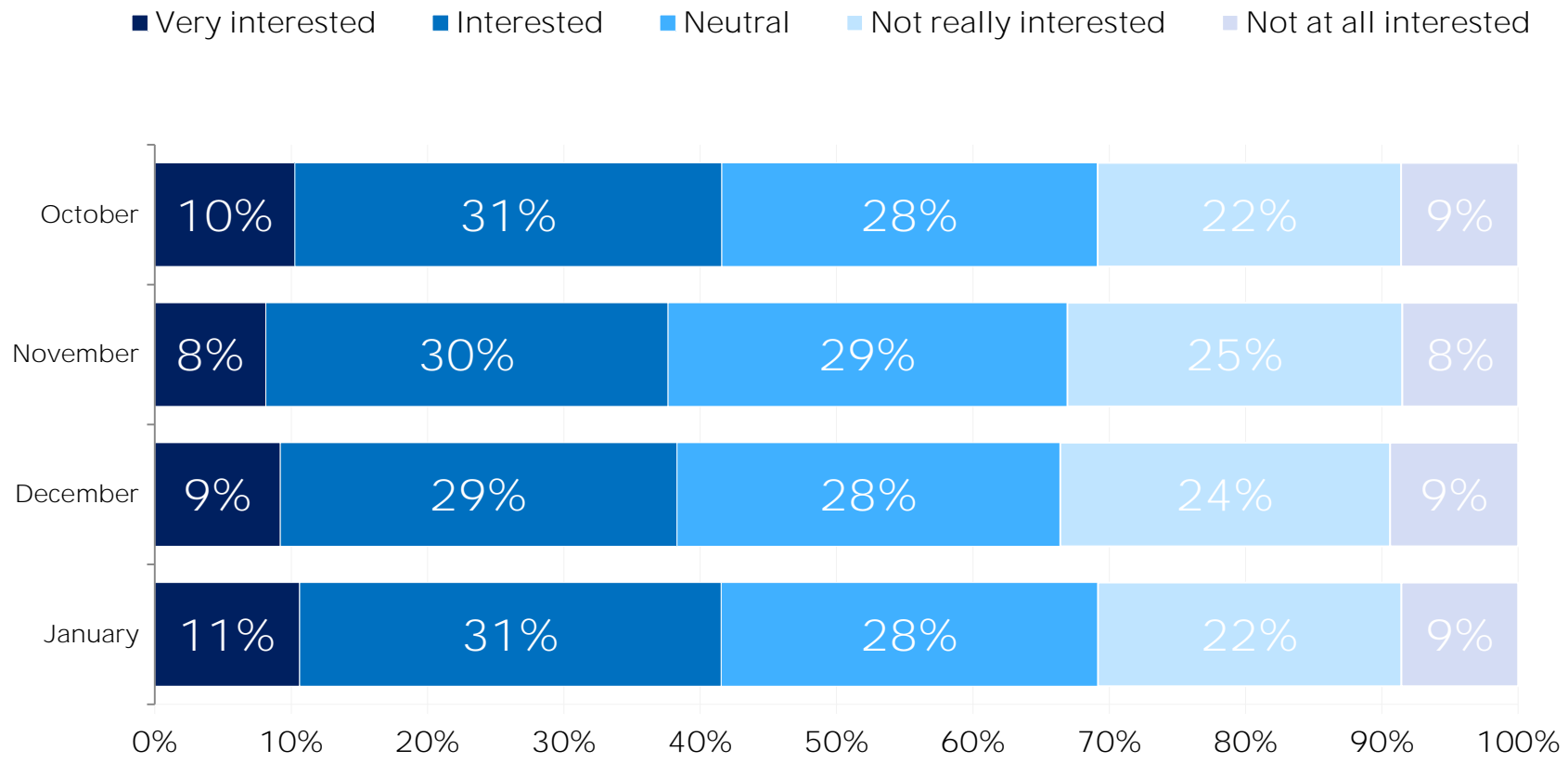


FREQUENCY OF DIGITAL ENGAGEMENT

- 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?

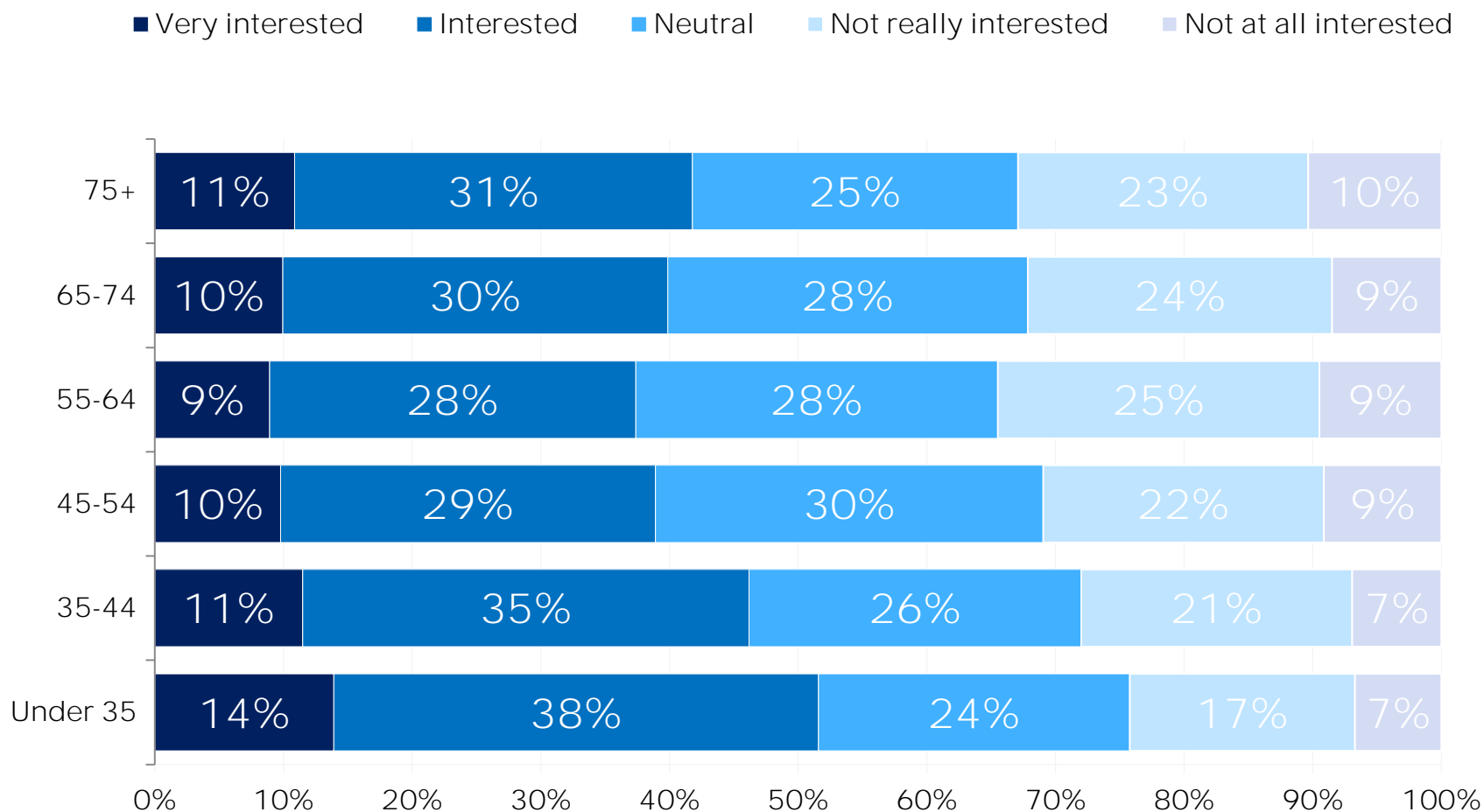


INTEREST IN DIGITAL IN FUTURE

- 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?



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INTEREST IN DIGITAL IN FUTURE

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

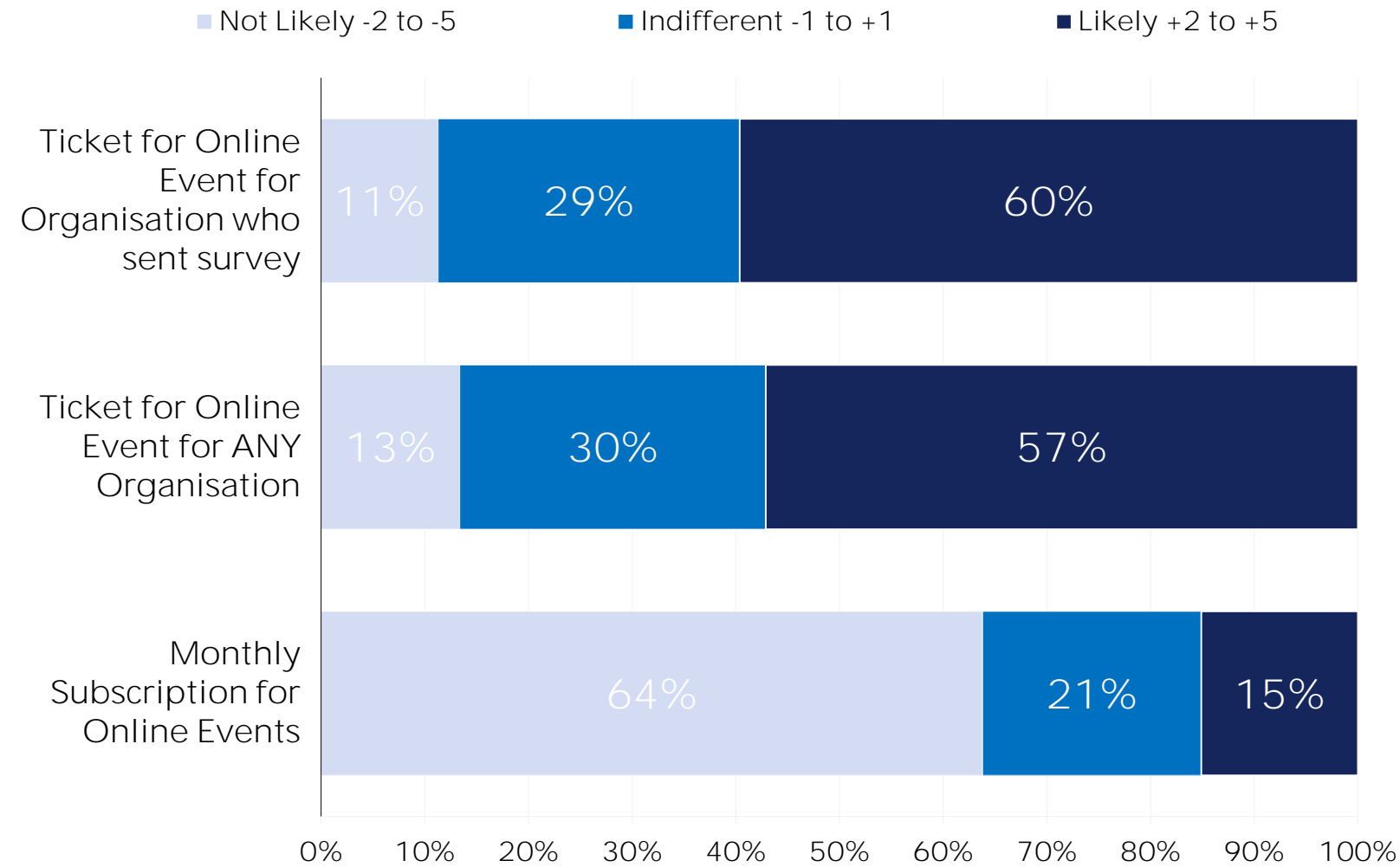
December and January Responses:

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...?

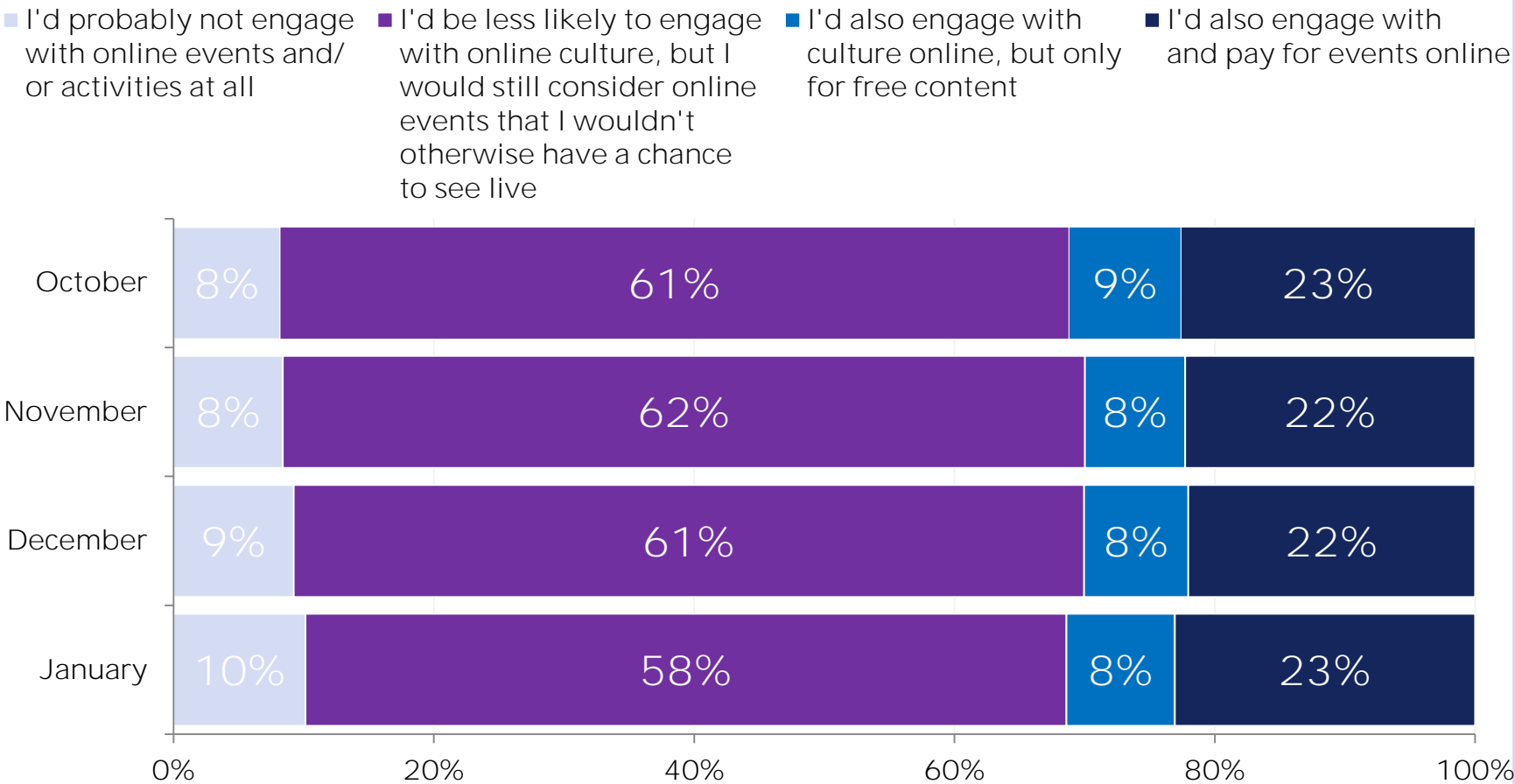


TICKETS FOR DIGITAL EVENTS

- 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?



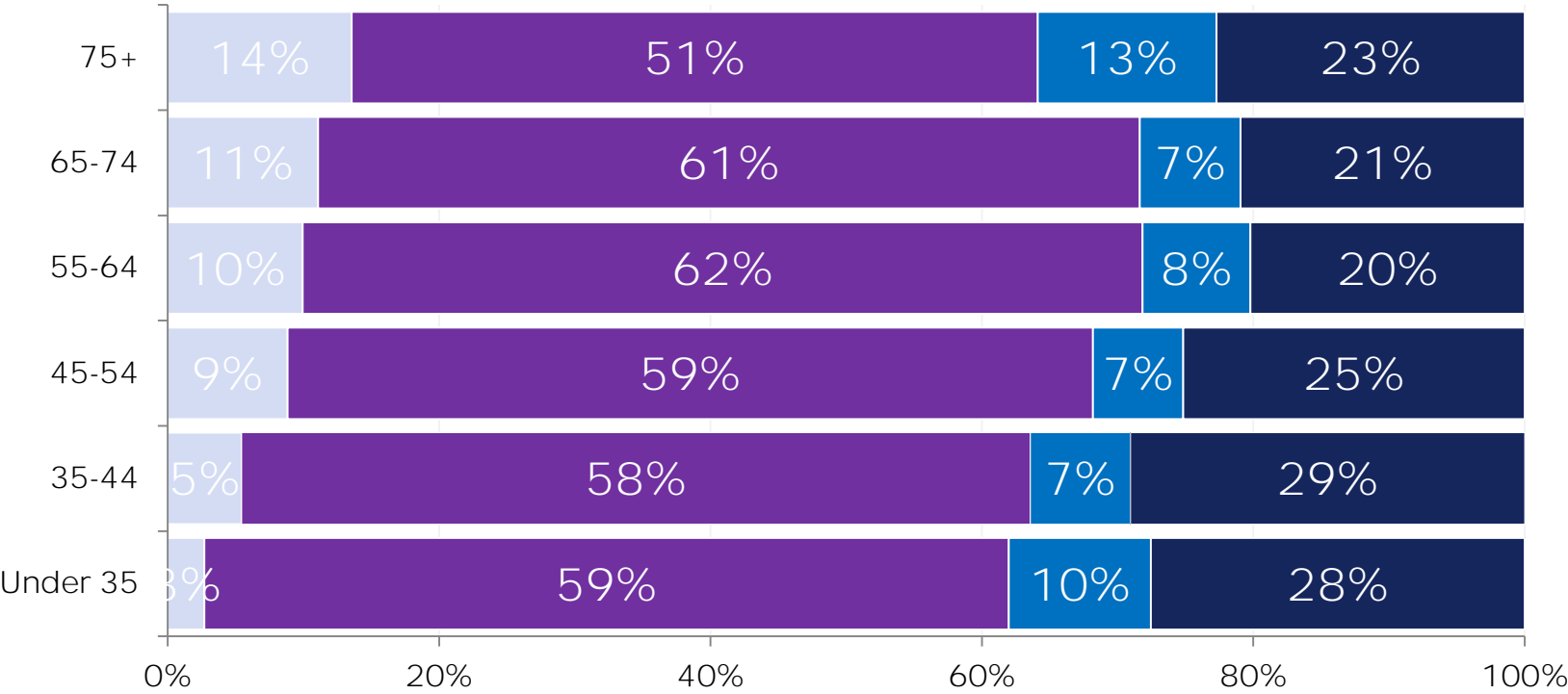
DIGITAL CULTURE VS IN PERSON ATTENDANCE

- 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

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



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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



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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.

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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?



What motivated you to watch or take part?

75%

'Next best' thing to attending or
visiting in person

72%

Supporting the venue/promoter

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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

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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

The screenshot shows a website with a dark background. In the top left corner is a red logo that reads 'ROYAL CO'. In the top right corner is a navigation bar with the links 'WHAT'S ON', 'SUPPORT US', 'PLAYWRITING', and 'MORE ...'. The main heading is 'My White Best Friend (and Other Letters Left Unsaid)' in large white text. Below it, in smaller white text, is 'Co-curated by writer Rachel De-Lahay and director Milli Bhatia'. At the bottom left of the main content area are the links 'Details / Extras / The Company'. A black modal box is overlaid on the right side of the page. It features a yellow circle with the 'BLACK TICKET PROJECT' logo at the top. Below the logo, the text 'Black Ticket Project' is displayed. Underneath that, it says 'Half the tickets for the readings are available for free through the Black Ticket Project.' At the bottom of the modal is a red button with the text 'Find out more'.

ROYAL CO

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

Black Ticket Project

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

[Find out more](#)

[A](#)
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High contrast mode
[Access](#)

Dream
[Story & production](#)
[Cast & credits](#)
[FAQs](#)
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[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

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.

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[Story & production](#)
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[Get ticket](#)

Choose your ticket

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

Audience Plus

Become a fully immersed 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](#)

Value for money 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](#)

Value for money 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](#)

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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+

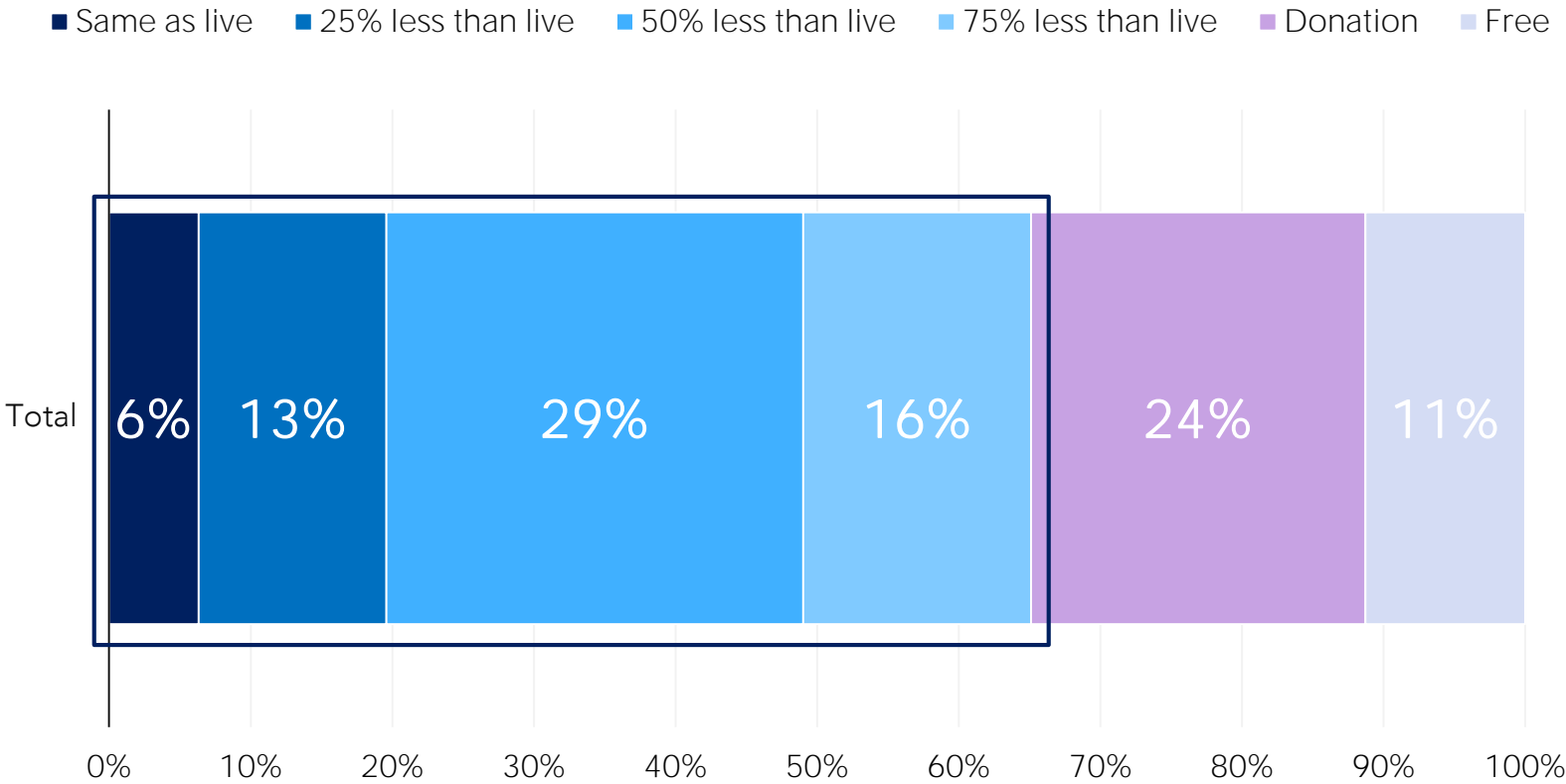
Content warning: *The Picture of Dorian Gray* includes extremely strong language and references to suicide and mental illness that some viewers may find upsetting. If you have been affected by any of the issues in *The Picture of Dorian Gray* [click here](#) for information on organisations that may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

Paying for Digital



64% would pay for digital

How much would you expect to pay for digital experiences?



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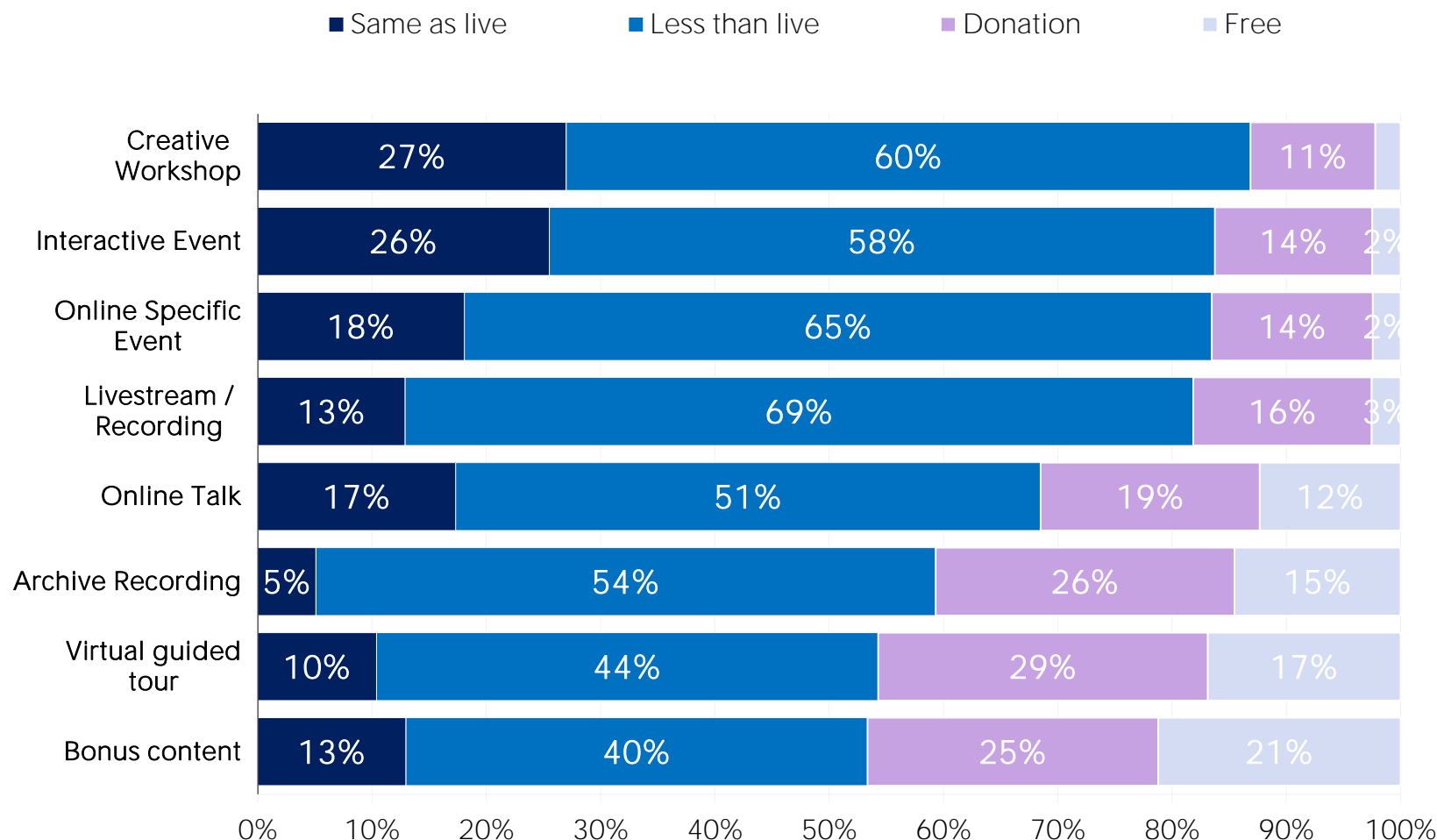
PAYING FOR DIGITAL EVENTS

- 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?

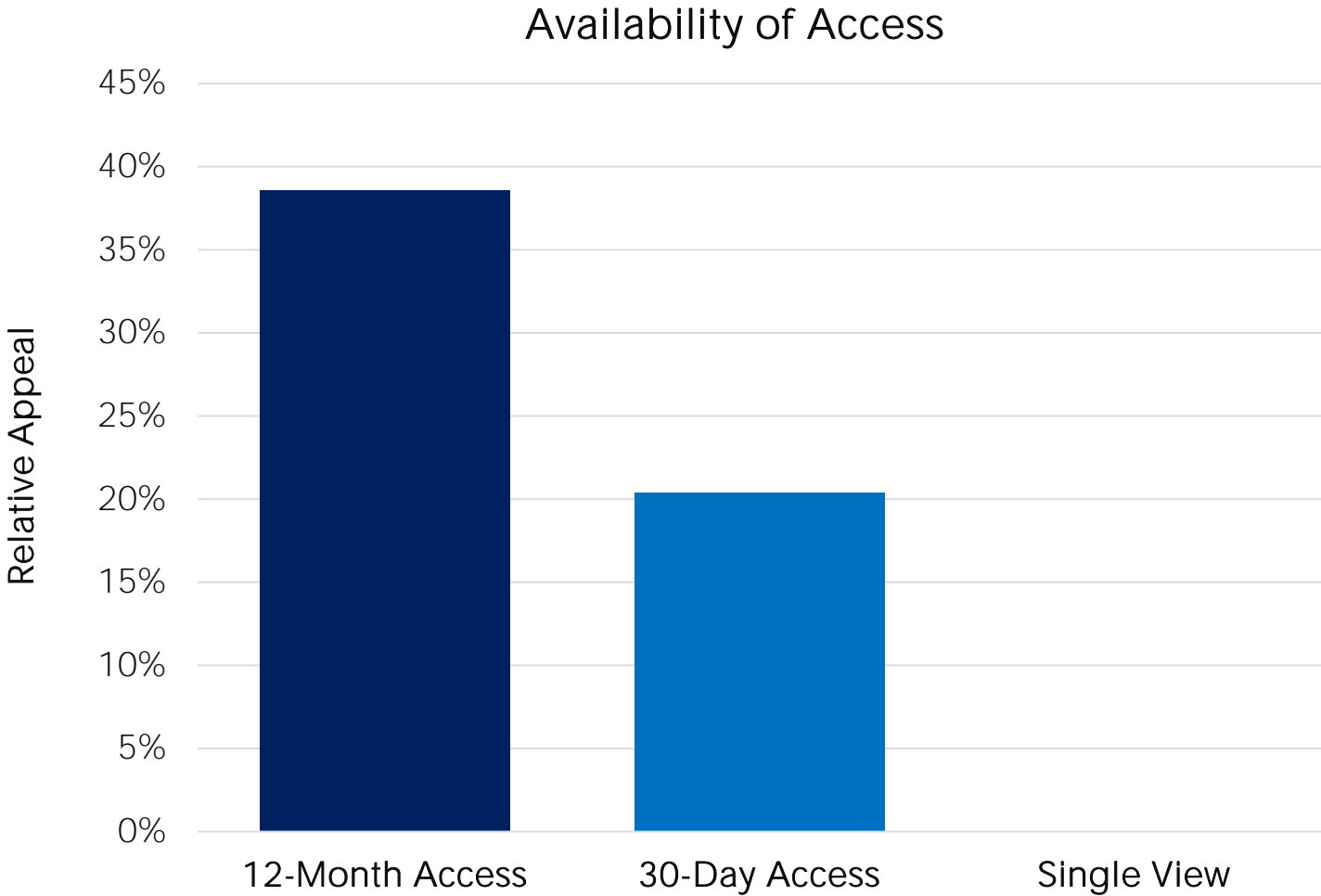


PAYING FOR DIGITAL EVENTS

- 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

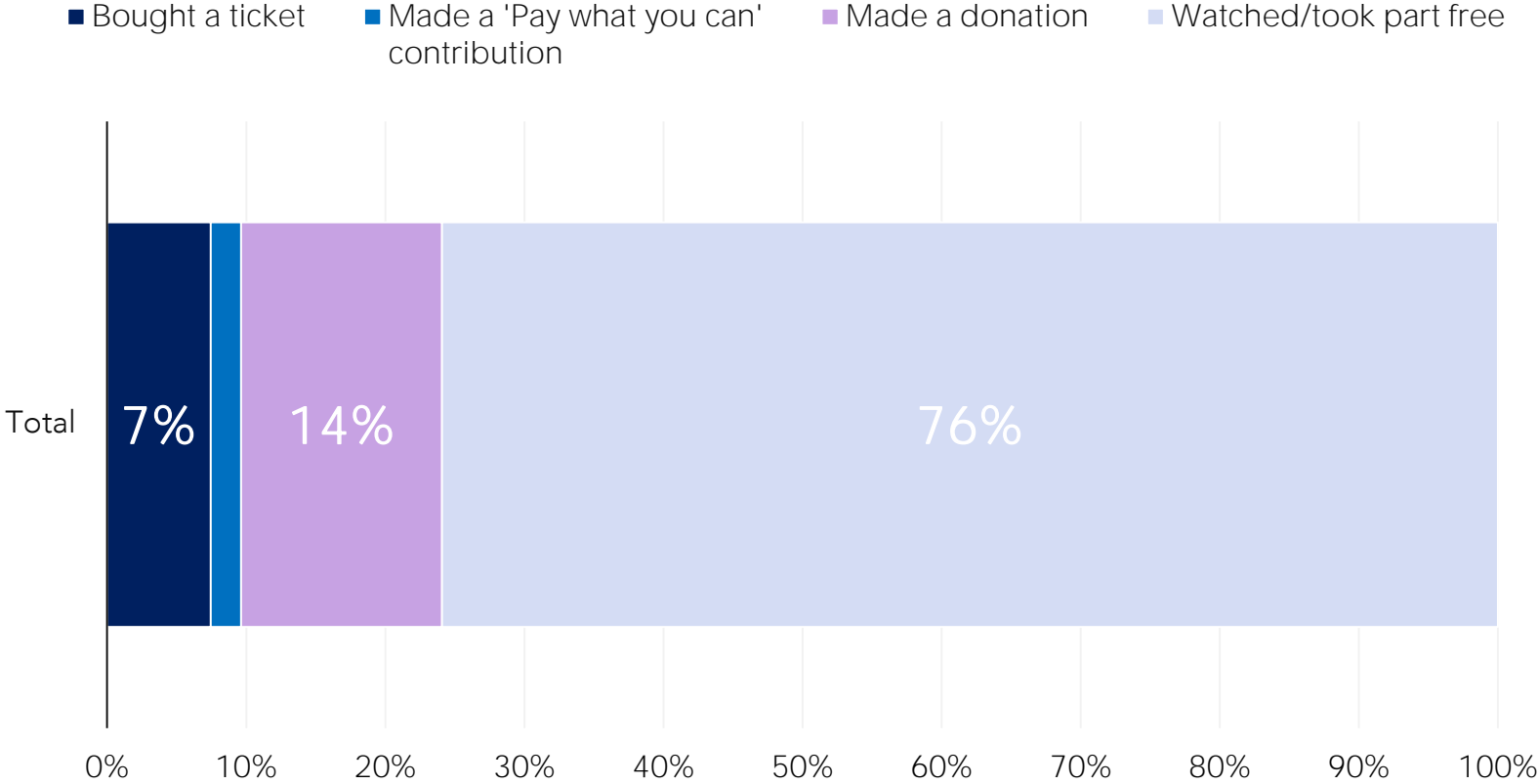
Availability of access to digital is also a key differentiator



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?

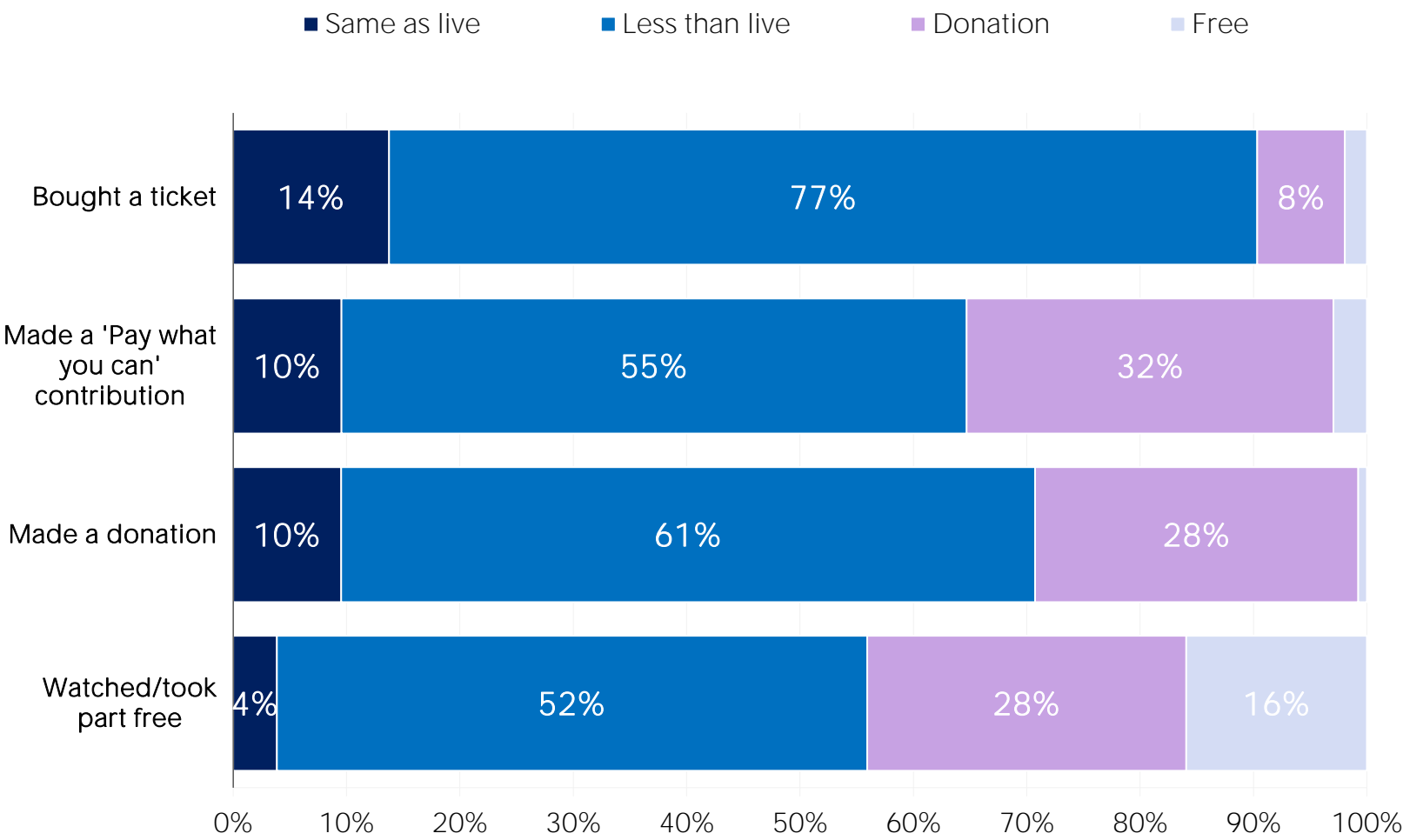


PAYING FOR DIGITAL EVENTS

- 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

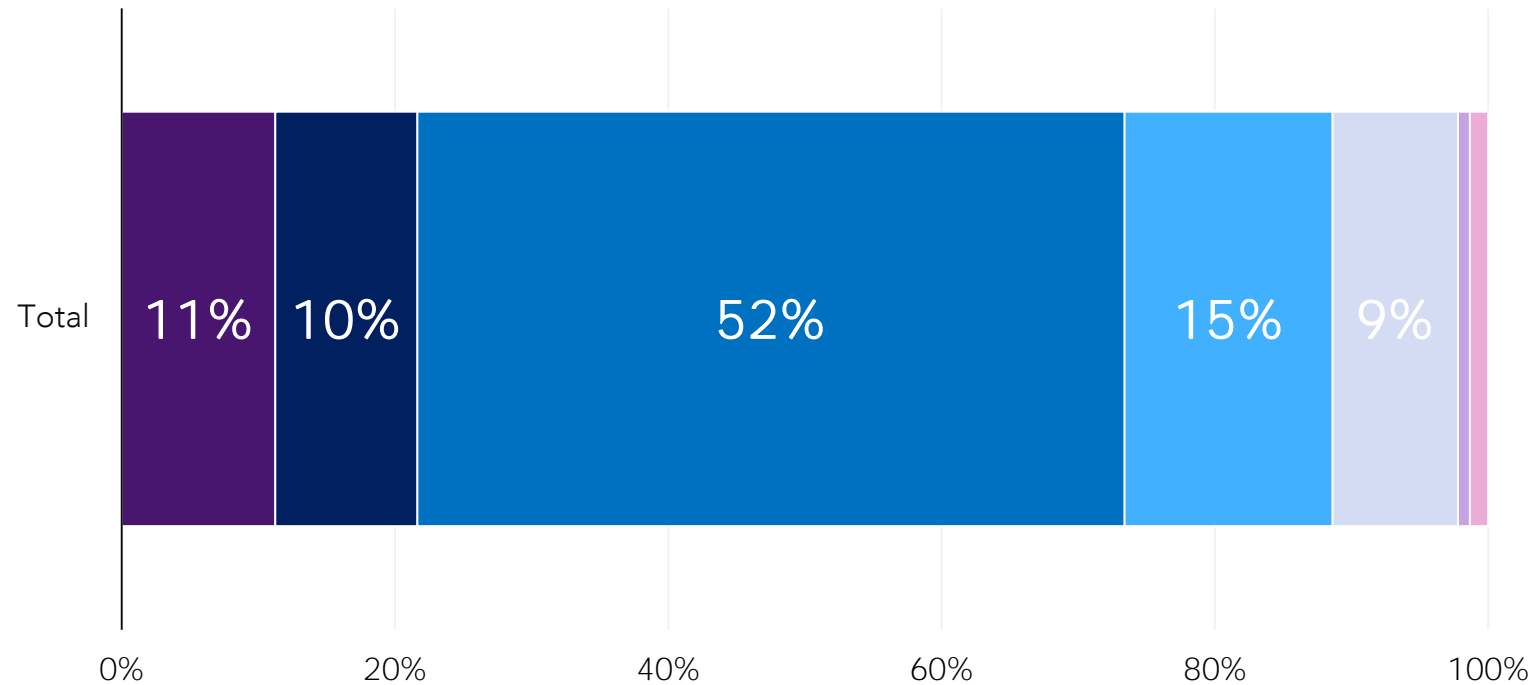
Digital Experience Survey



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



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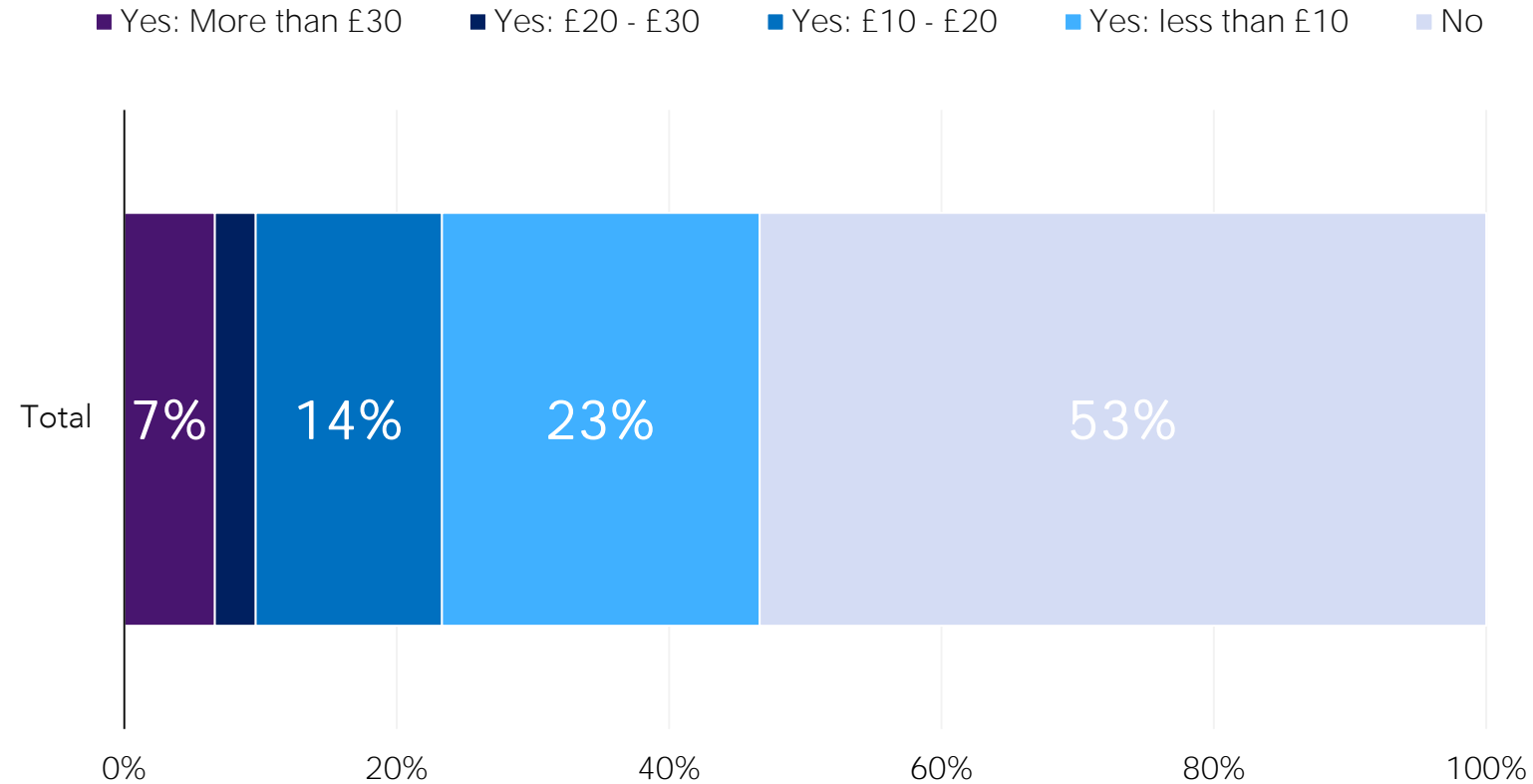


PAYING FOR DIGITAL EVENTS

- 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?



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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



- 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

0 ▼

Video On-Demand: Choose Your Price - \$65.00

0 ▼

Video On-Demand: Choose Your Price - \$40.00

0 ▼

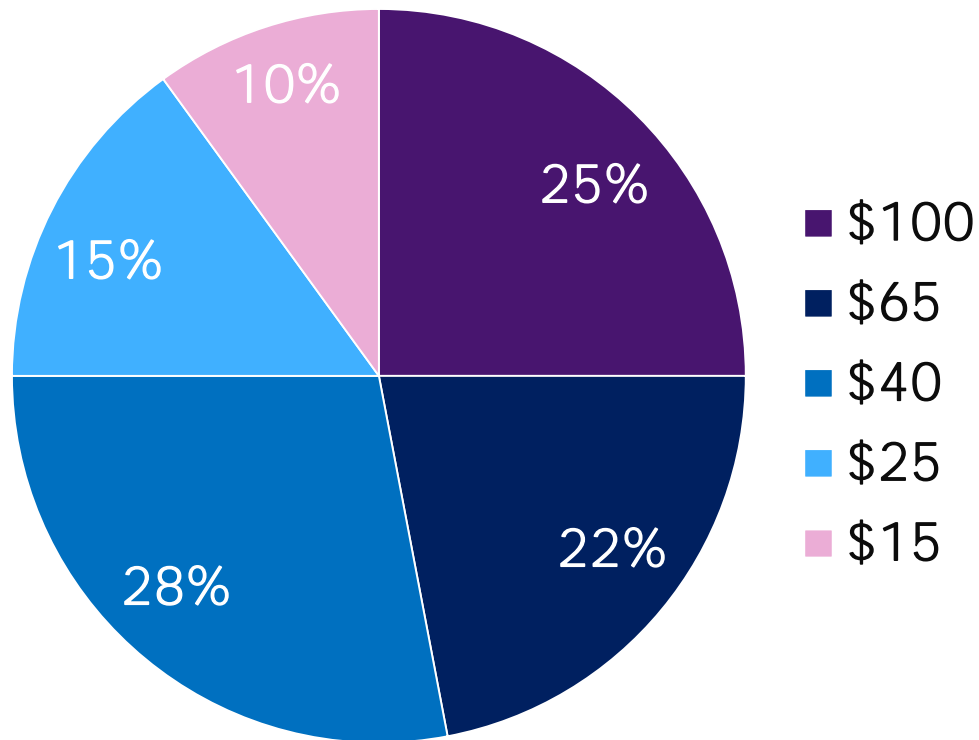
Video On-Demand: Choose Your Price - \$25.00

0 ▼

Video On-Demand: Choose Your Price - \$15.00

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

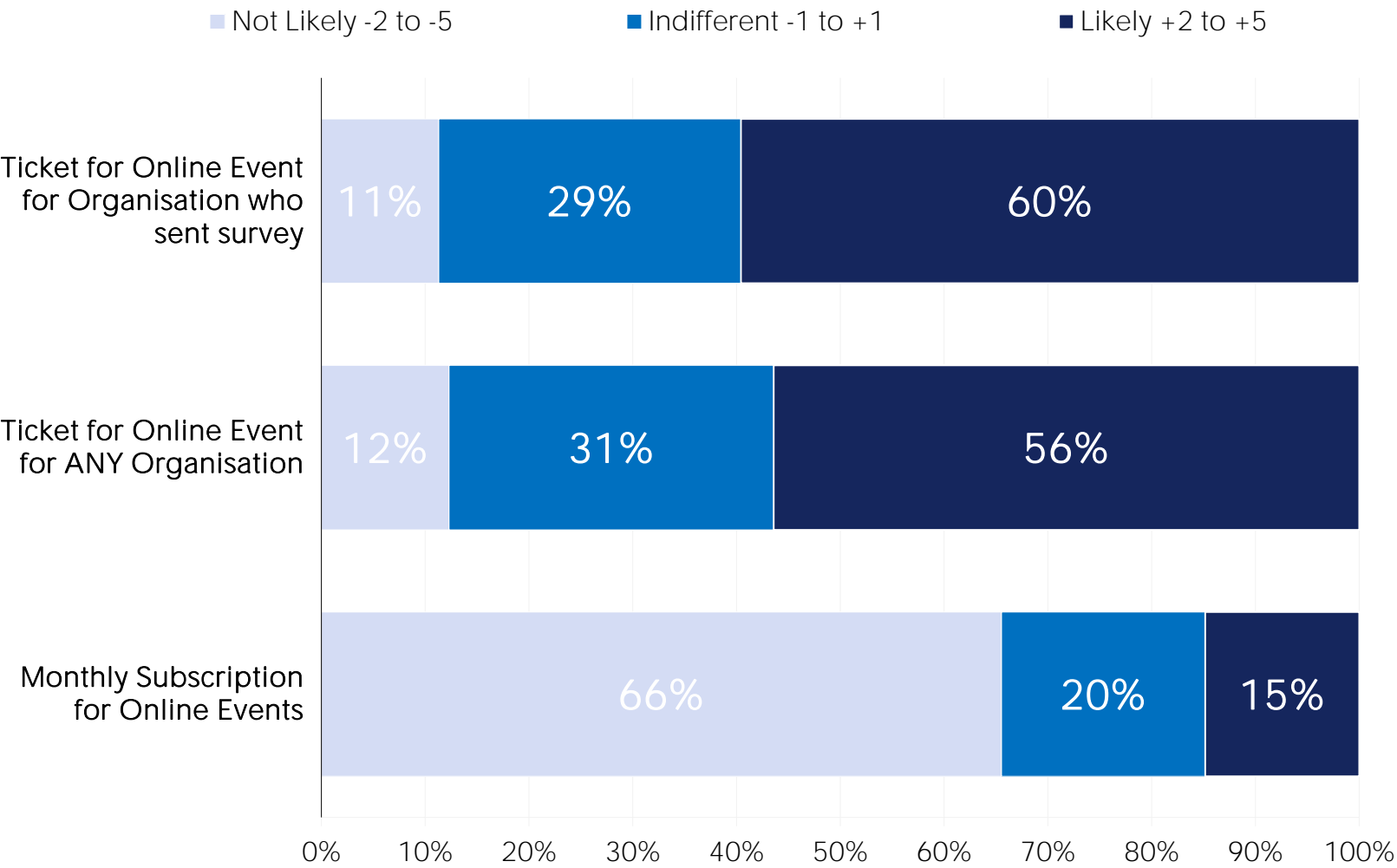
General Public

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.

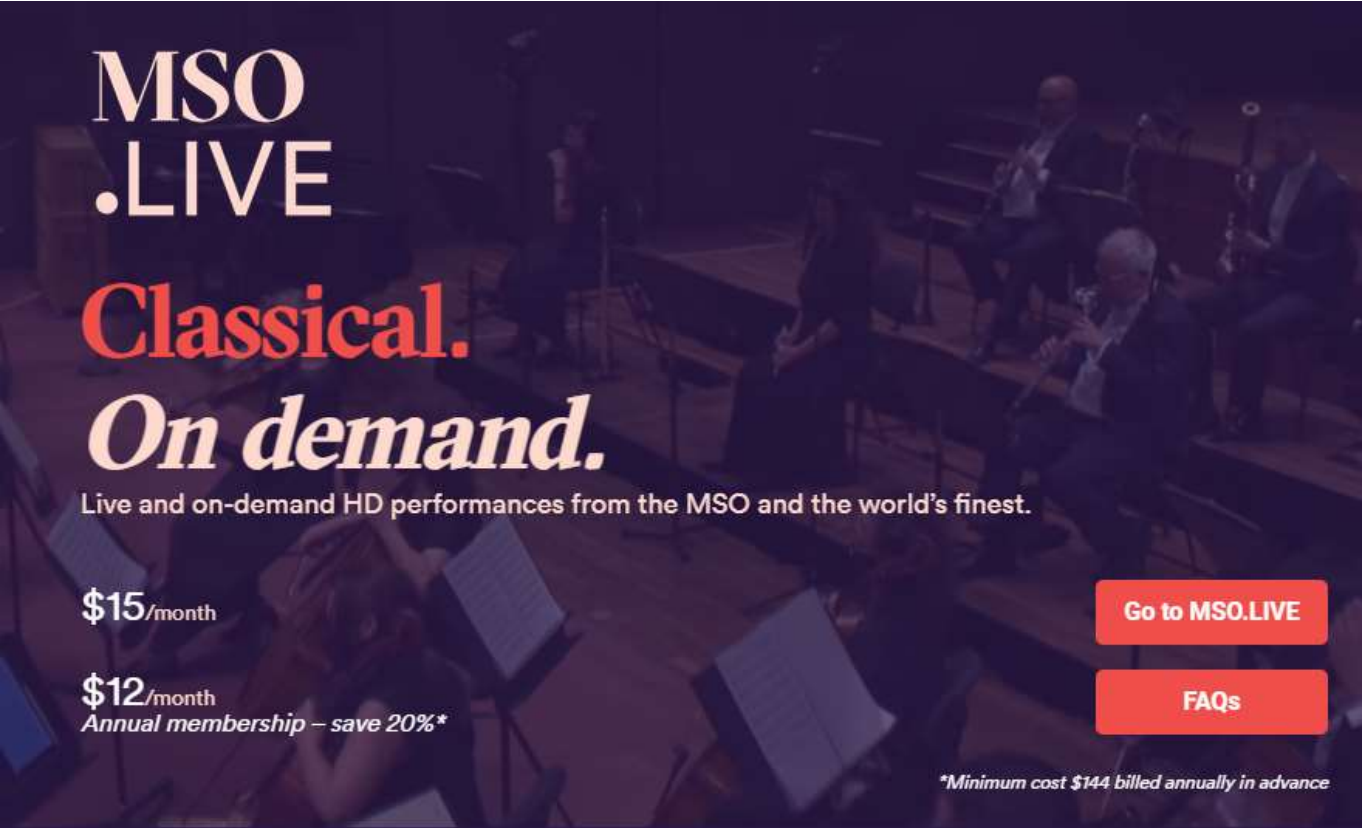
How likely would you be to buy a...?



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

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.

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

Further insights coming soon...

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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

Q&A

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