



Missing Audiences

Wave 1 Report

September to October 2021

INSIGHTS
ALLIANCE

supporting cultural recovery

indigo

BAKERRICHARDS

One Further

Survey Overview



RESPONSES

10,834



WAVE 1 (6 WEEKS):

13 September to 25 October



PARTICIPATING ORGANISATIONS

50

Respondent profile



AGE

48% OVER 65

40% 45 TO 64

9% UNDER 45



LOCATION

82% ENGLAND

7% SCOTLAND

3% WALES

8% N. IRELAND

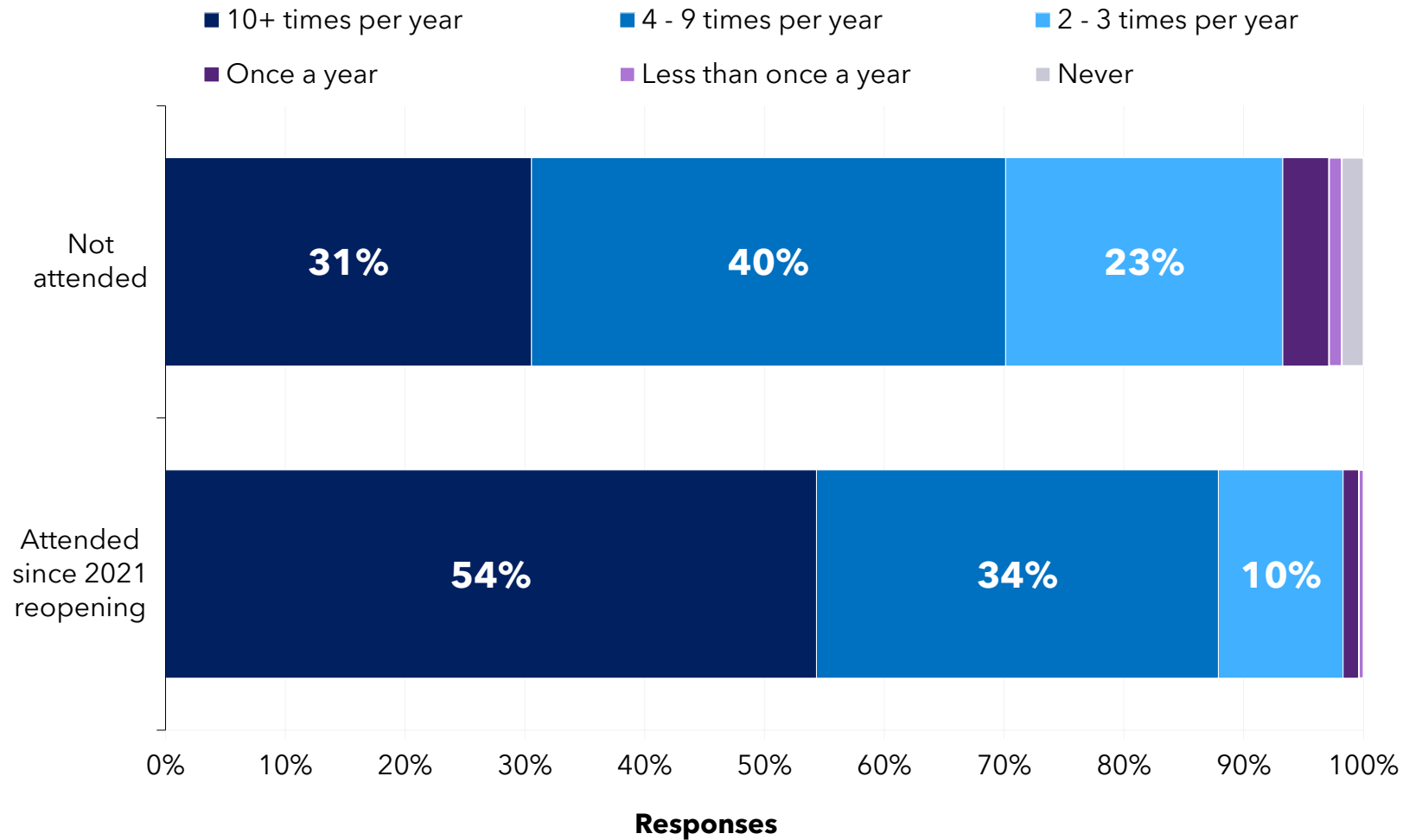


D/deaf OR DISABLED

13% IDENTIFY AS D/deaf OR DISABLED

Pre-Covid attendance

How often would you say that you attended or visited cultural events and venues pre-Covid?

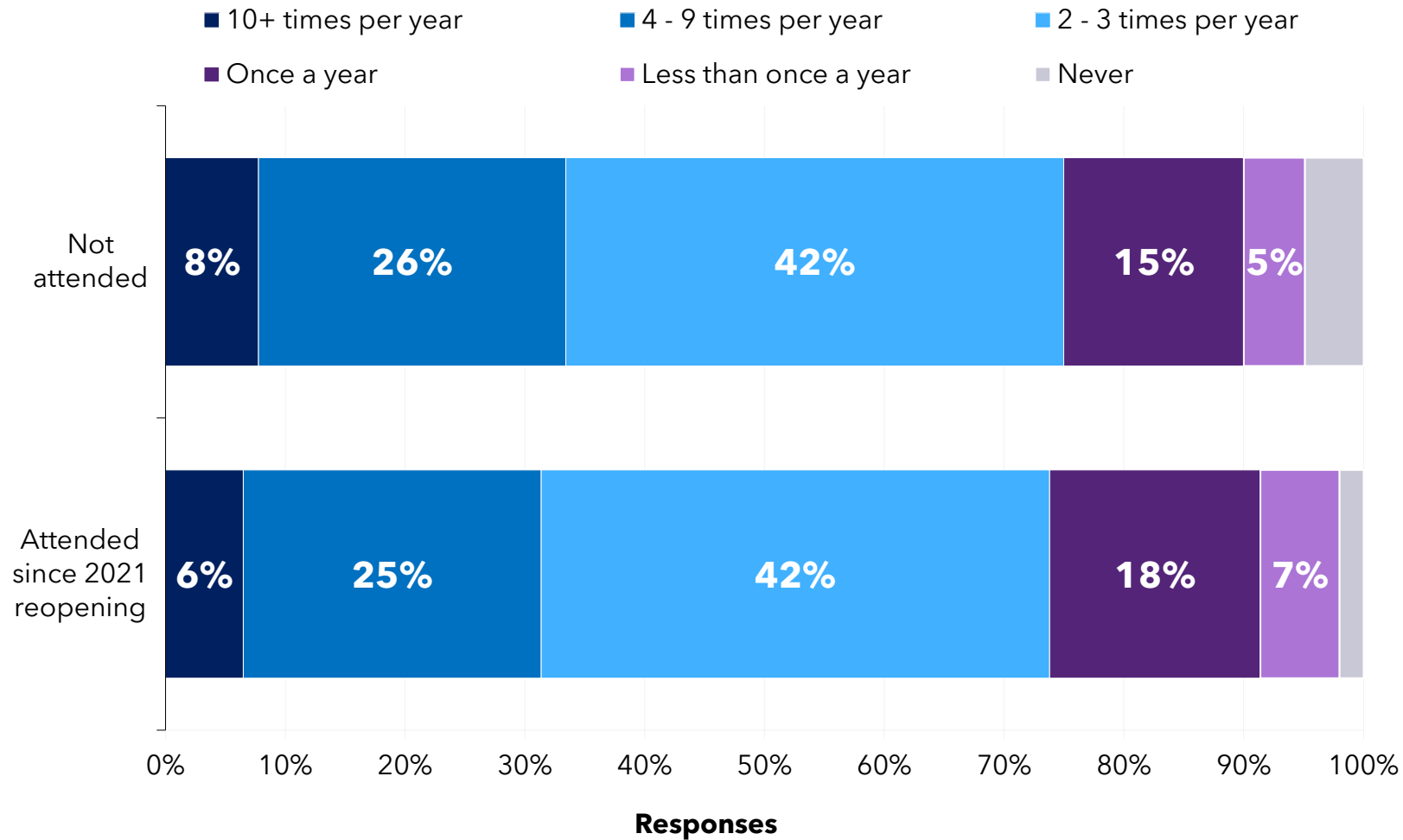


ATTENDANCE

- Respondents who've returned were more frequent attenders, pre-Covid
- But a third of non-returners used to attend 10+ times a year

Wave 1 n = 10,834

How often would you say that you attended or visited the ORGANISATION who sent you this survey pre-Covid?

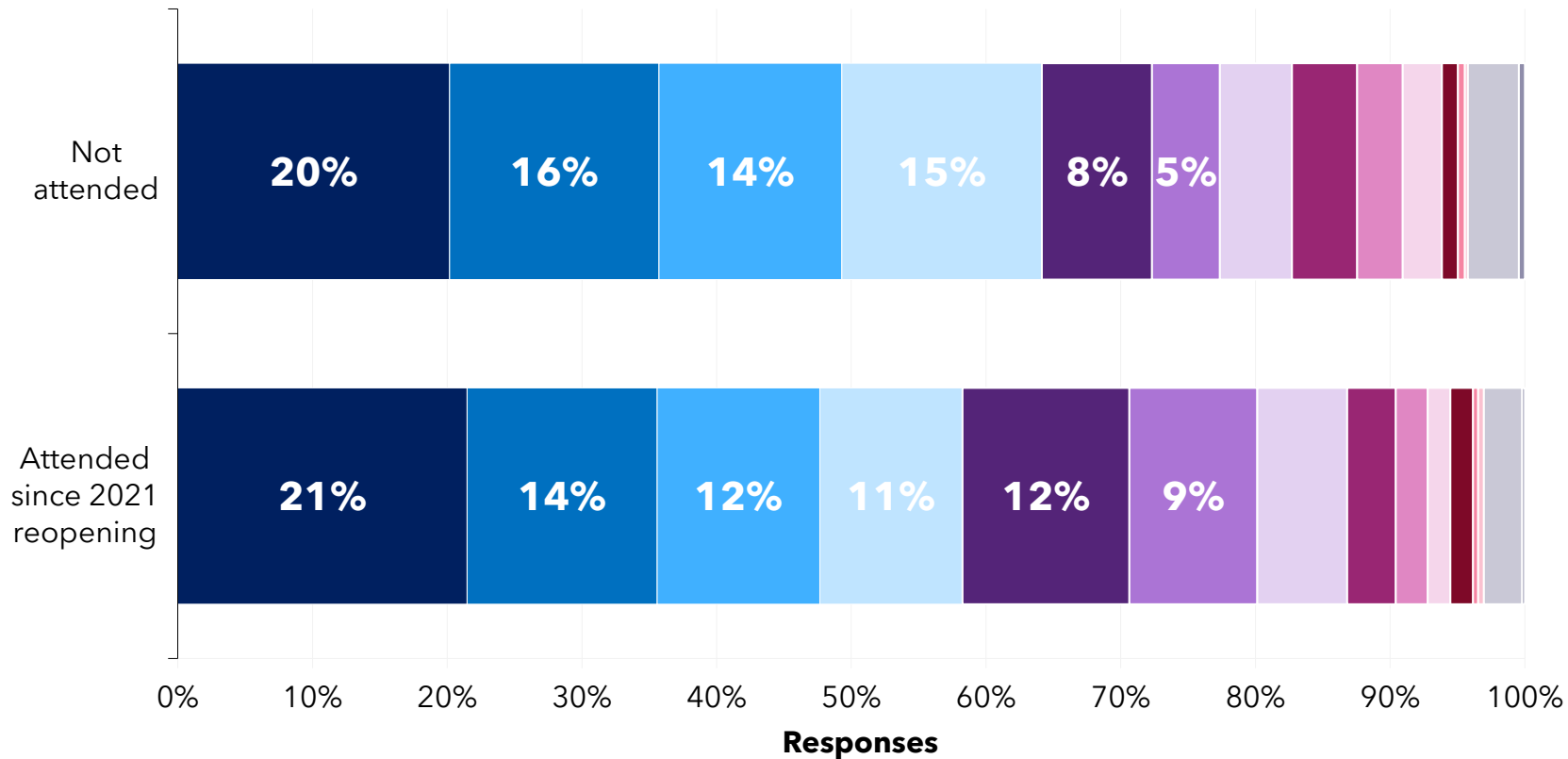
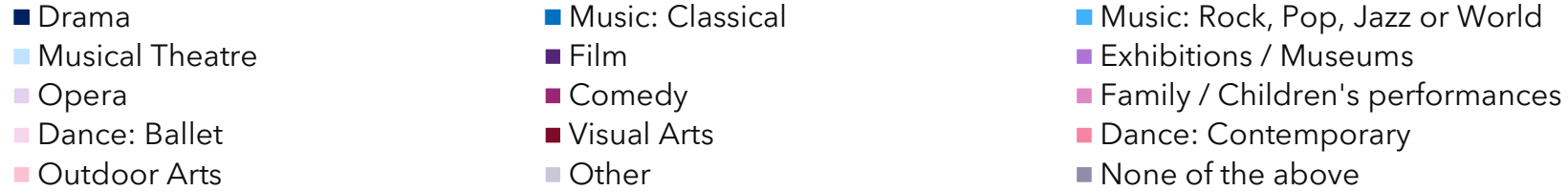


ATTENDANCE

- Both groups were frequent attenders at the surveying organisations

Wave 1 n = 10,801

Which artform did you tend to go to MOST regularly pre-Covid? (please choose only one)

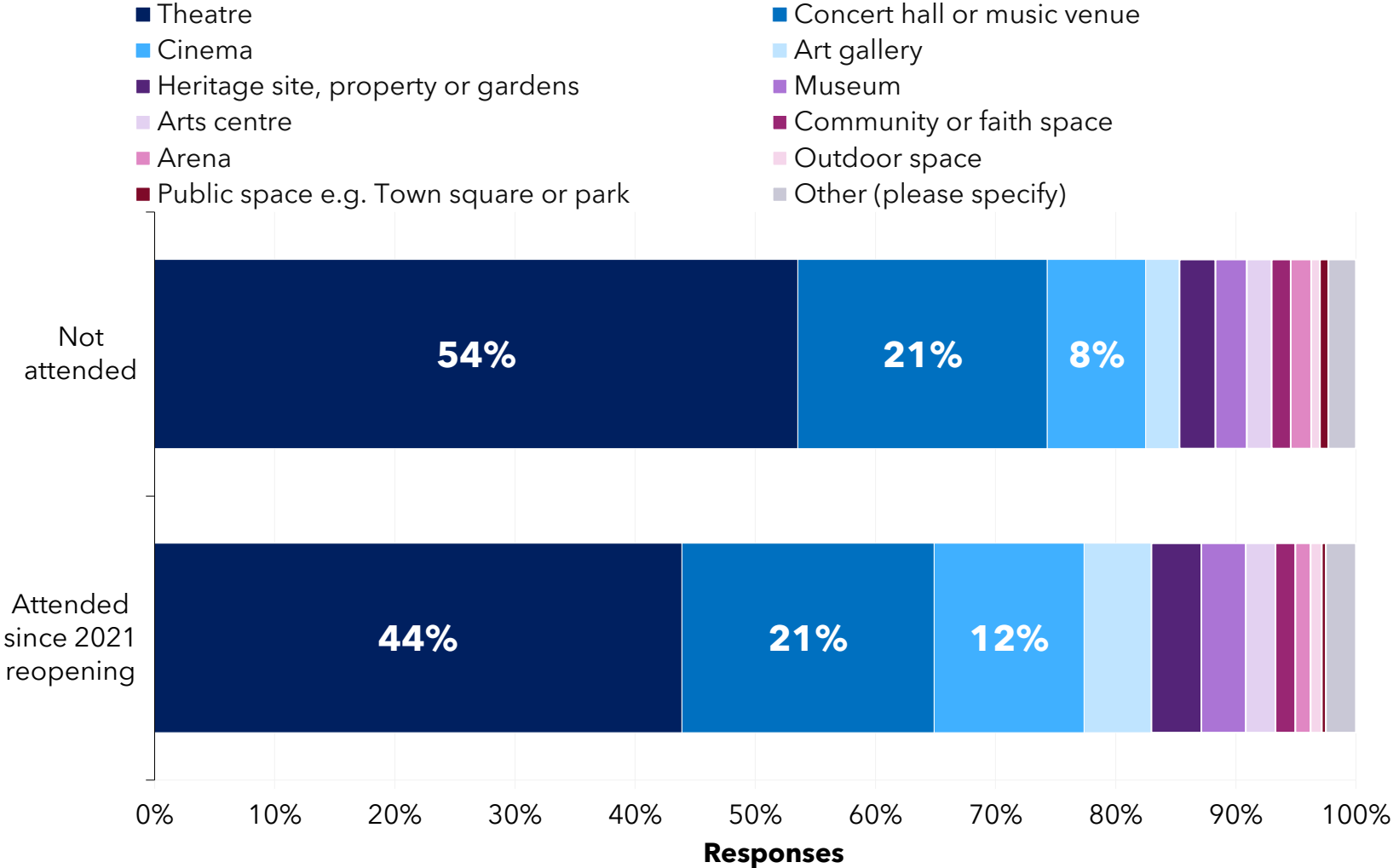


ARTFORM

- Slightly larger Musical Theatre audience among non-returners

Wave 1 n = 10,734

In which type of venue or location did you MOST frequently attend cultural experiences? (please choose only one)



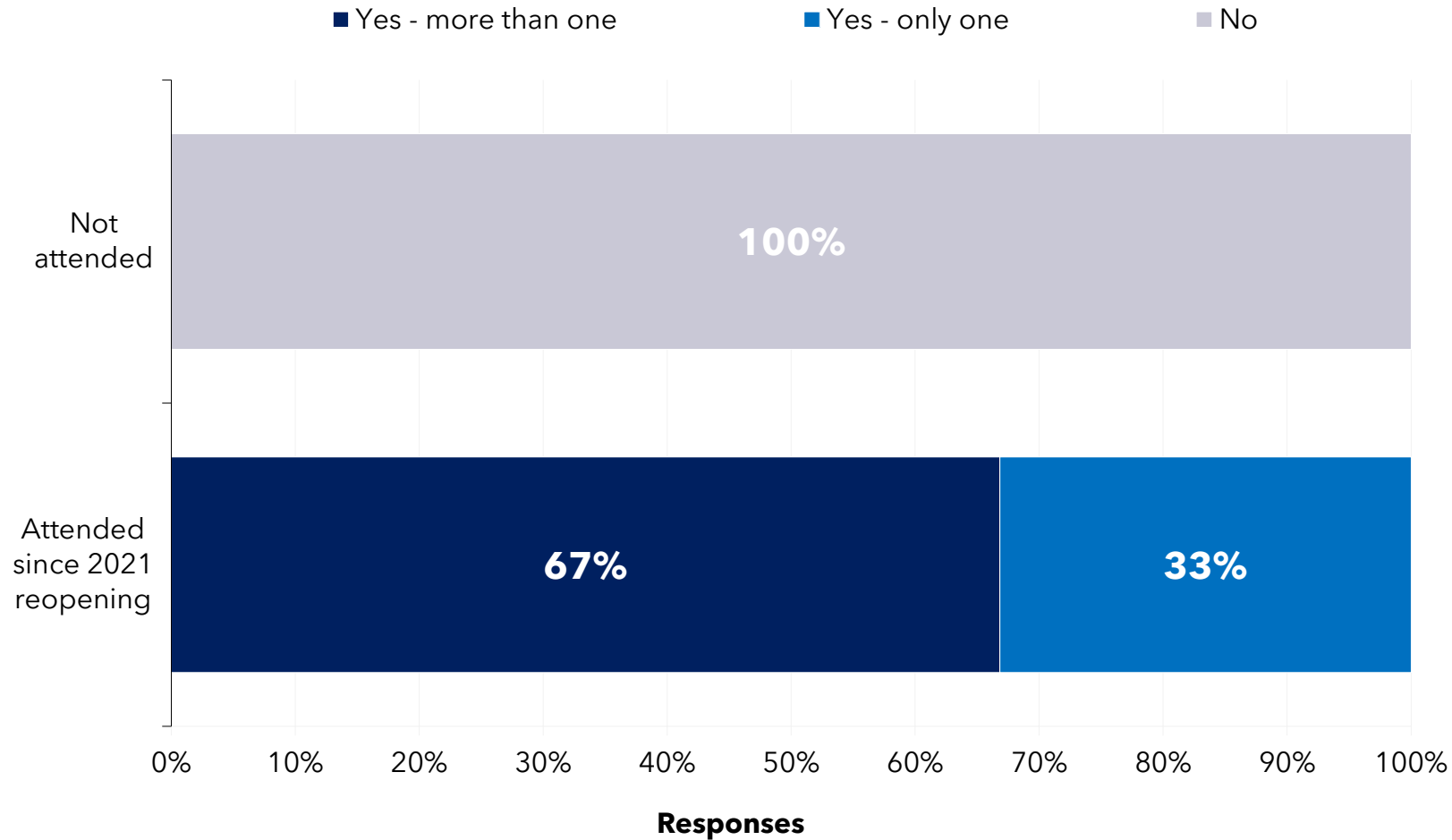
VENUE

- A higher proportion of non-returned attendees attended theatre most frequently pre-Covid

Wave 1 n = 10,719

Post-Covid attendance

Have you attended (in person) any cultural events, activities or venues since venues reopened in 2021?

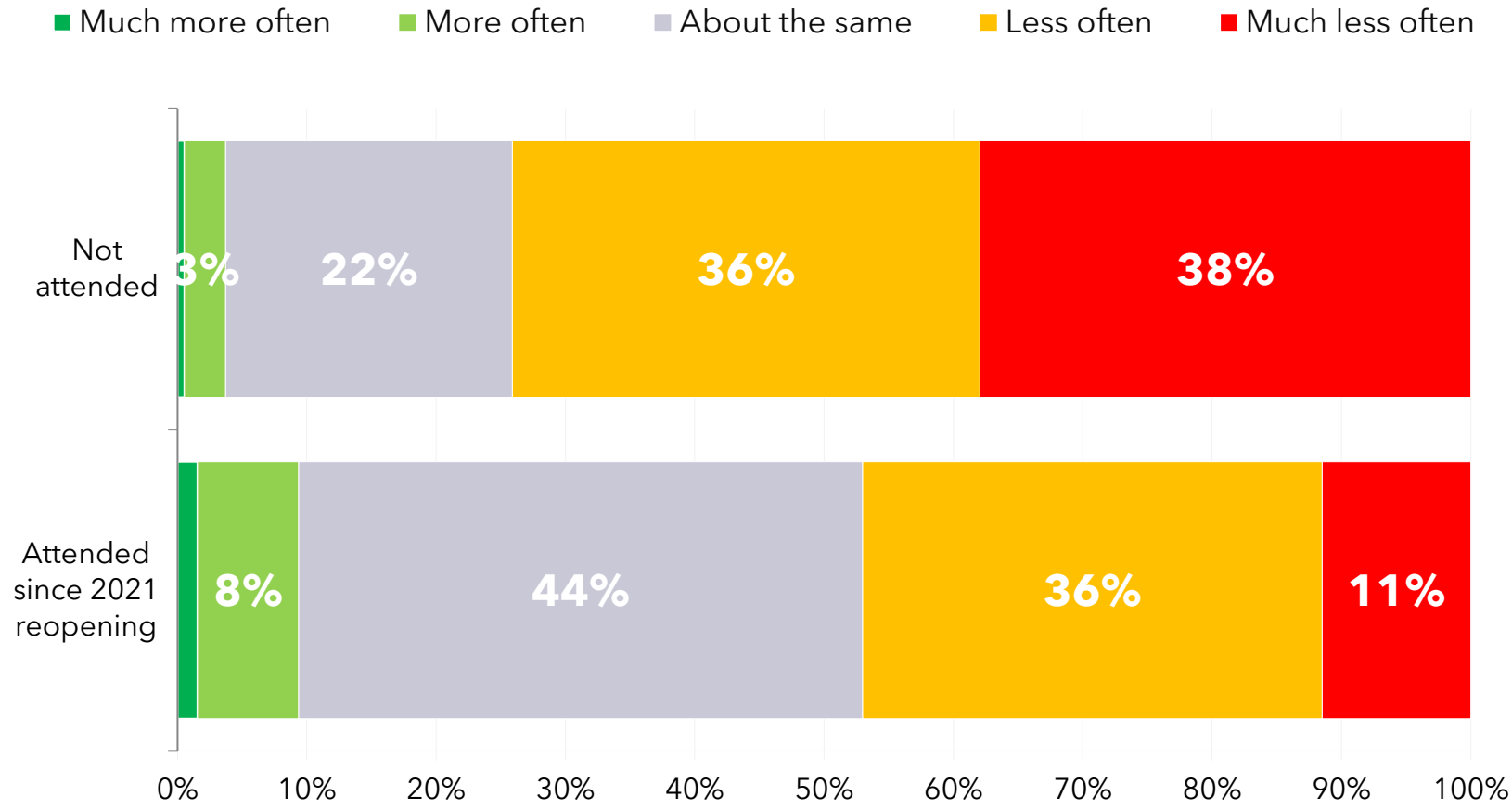


ATTENDANCE

- The segments we'll be showing responses by in this report
- Of those who have returned, a majority have attended more than once

Wave 1 n = 10,834

As things stand today, in the next 12 months do you expect to attend cultural events and venues more or less than pre-Covid?

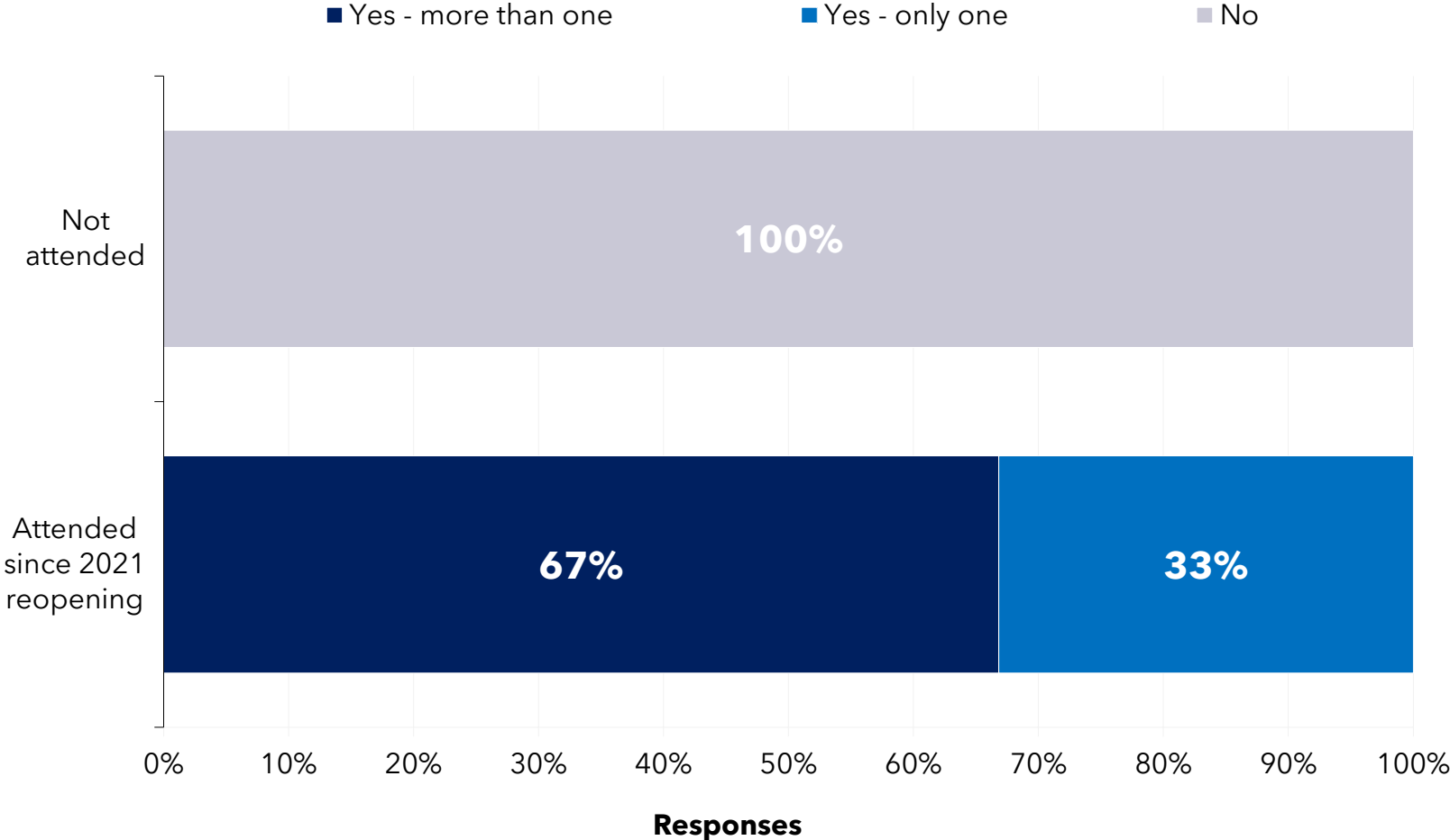


ATTENDANCE

- Non-returners expect to attend less often
- A larger proportion of returners expect to maintain their pre-Covid attendance

Wave 1 n = 10,604

Have you attended (in person) any cultural events, activities or venues since venues reopened in 2021?

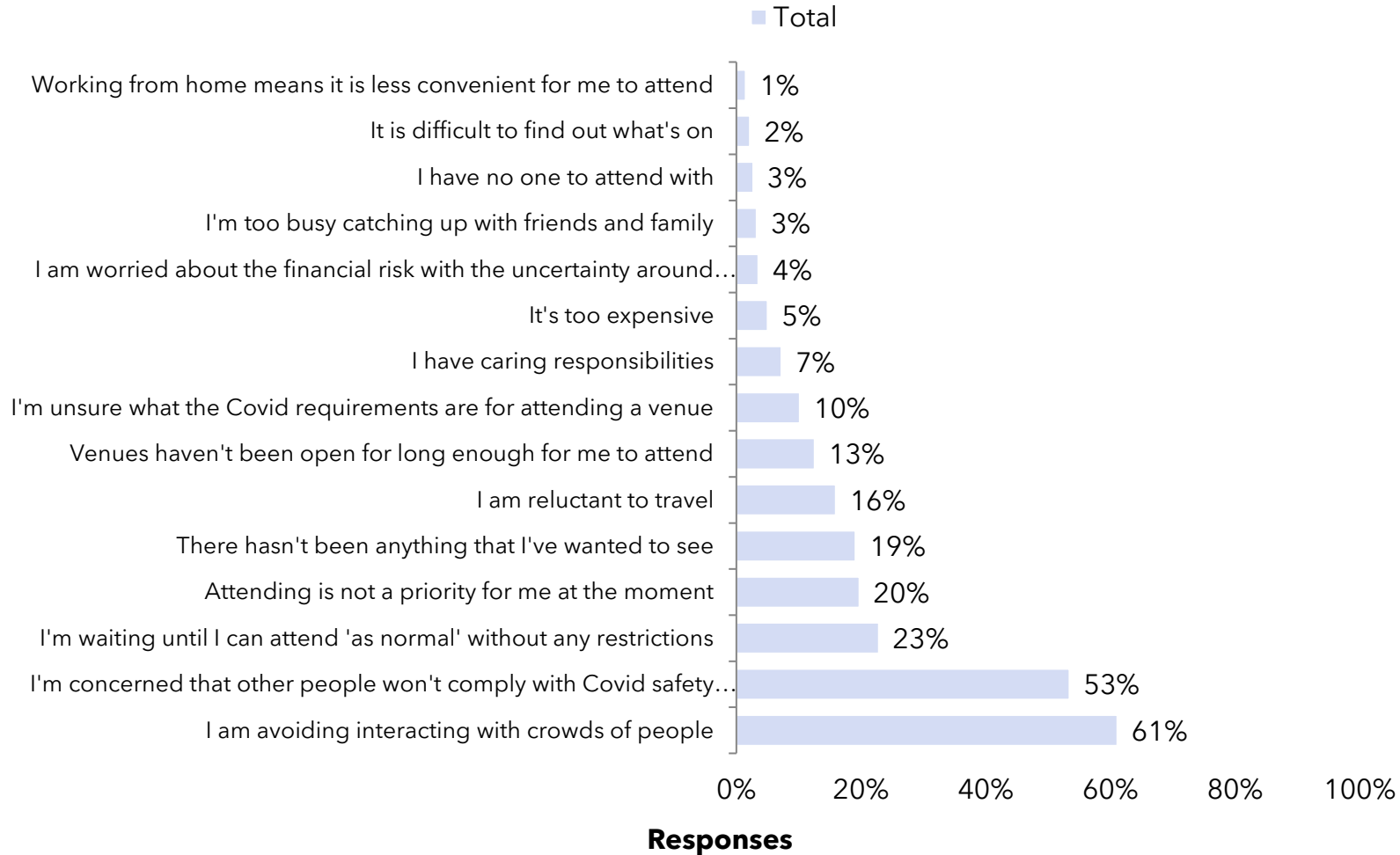


ATTENDANCE

- A majority of returners have attended more than once

Wave 1 n = 10,834

(Those who have not attended anything) Could you tell us which of the following might be reasons for that? (select all that apply)

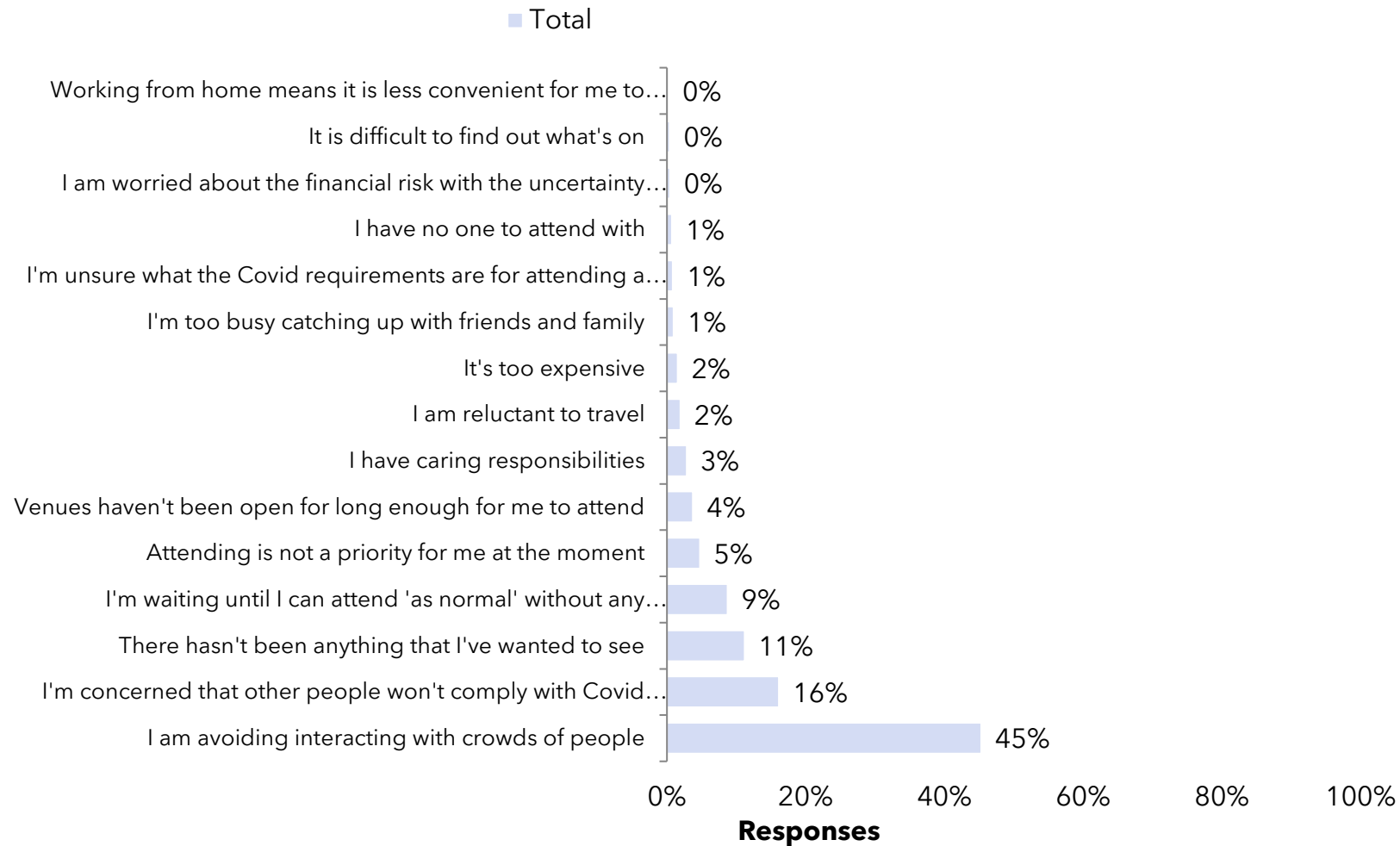


REASONS FOR NOT ATTENDING

- The main reasons for not attending are Covid related: avoiding crowds and concern about other people following the rules
- 23% are waiting until they can attend 'as normal'

Wave 1 n = 4,920

Of the reasons you selected, which ONE would you say has been the biggest reason?

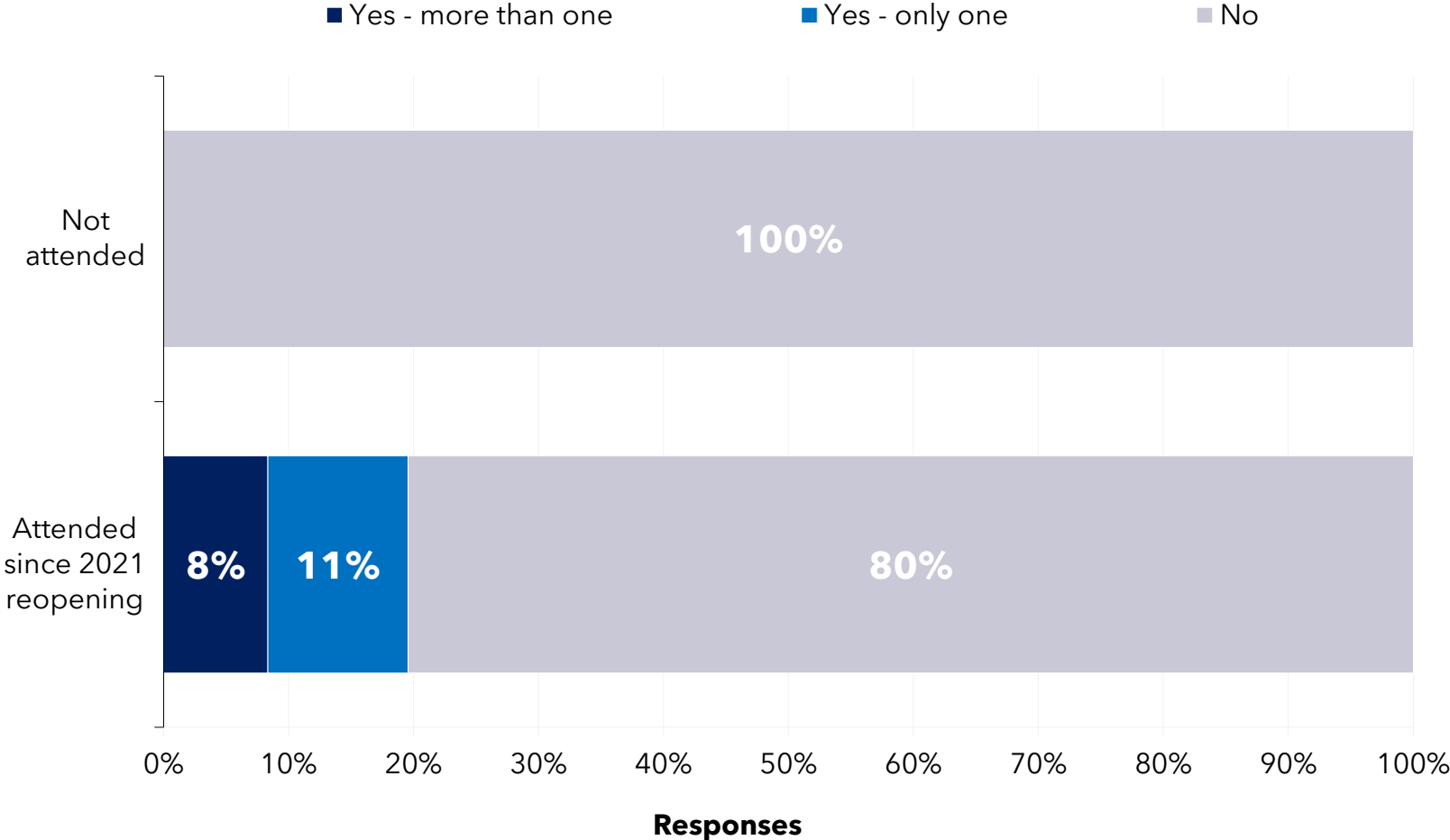


REASONS FOR NOT ATTENDING

- The biggest reason selected by non-returners was avoiding crowds

Wave 1 n = 4,920

Have you attended the ORGANISATION who sent you this survey since Covid?

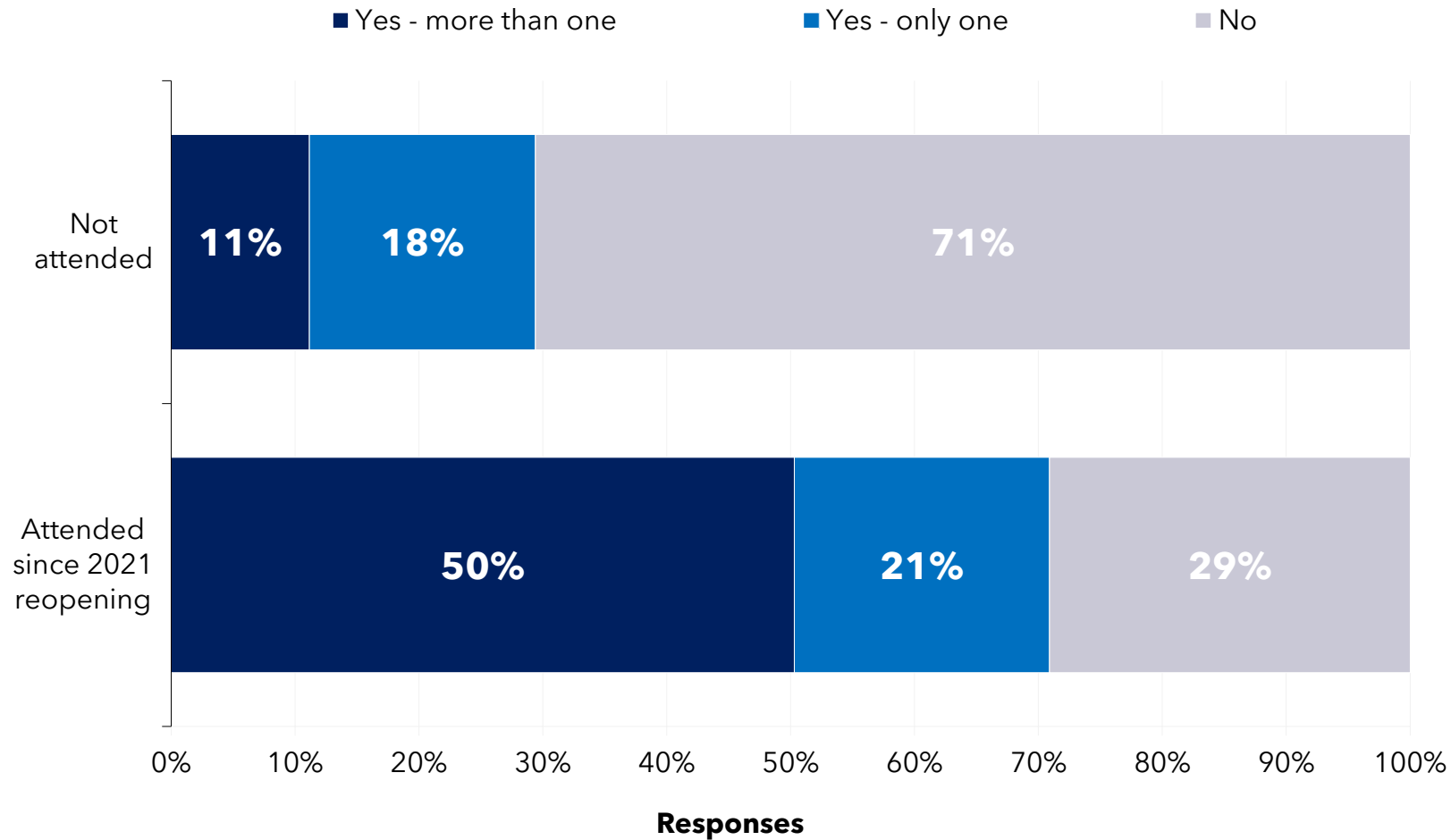


ATTENDANCE

- 20% of returners have attended the surveying organisation

Wave 1 n = 10,834

Have you made bookings for any cultural events in the future (either booked by you or someone you're attending with) or planned any visits to cultural organisations?



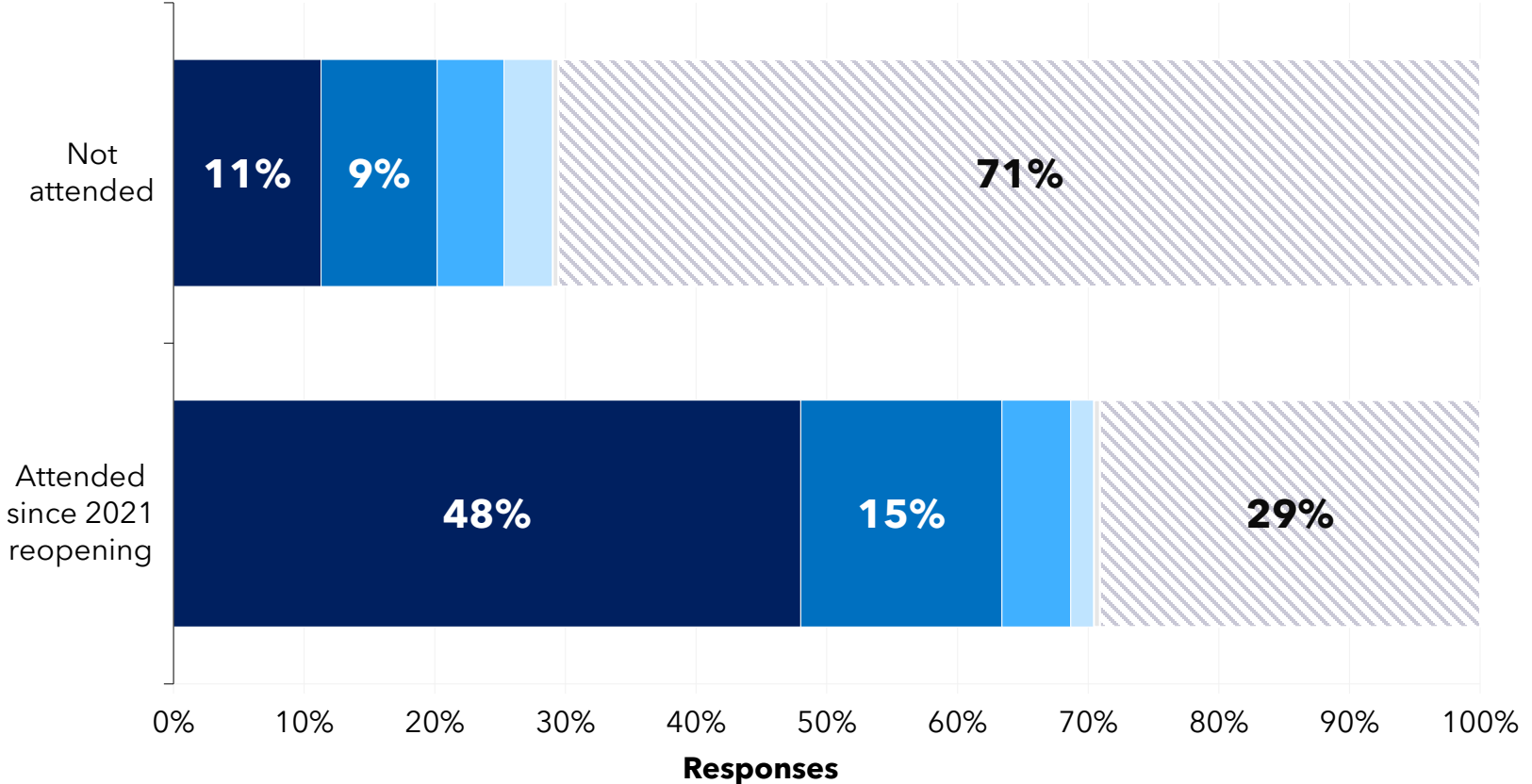
FUTURE BOOKINGS

- 29% of non-returners have a future booking

Wave 1 n = 10,834

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

■ within the next month
 ■ 1 to 3 months
 ■ 3 to 6 months
 ■ more than 6 months
 ■ not sure
 ■ no future booking

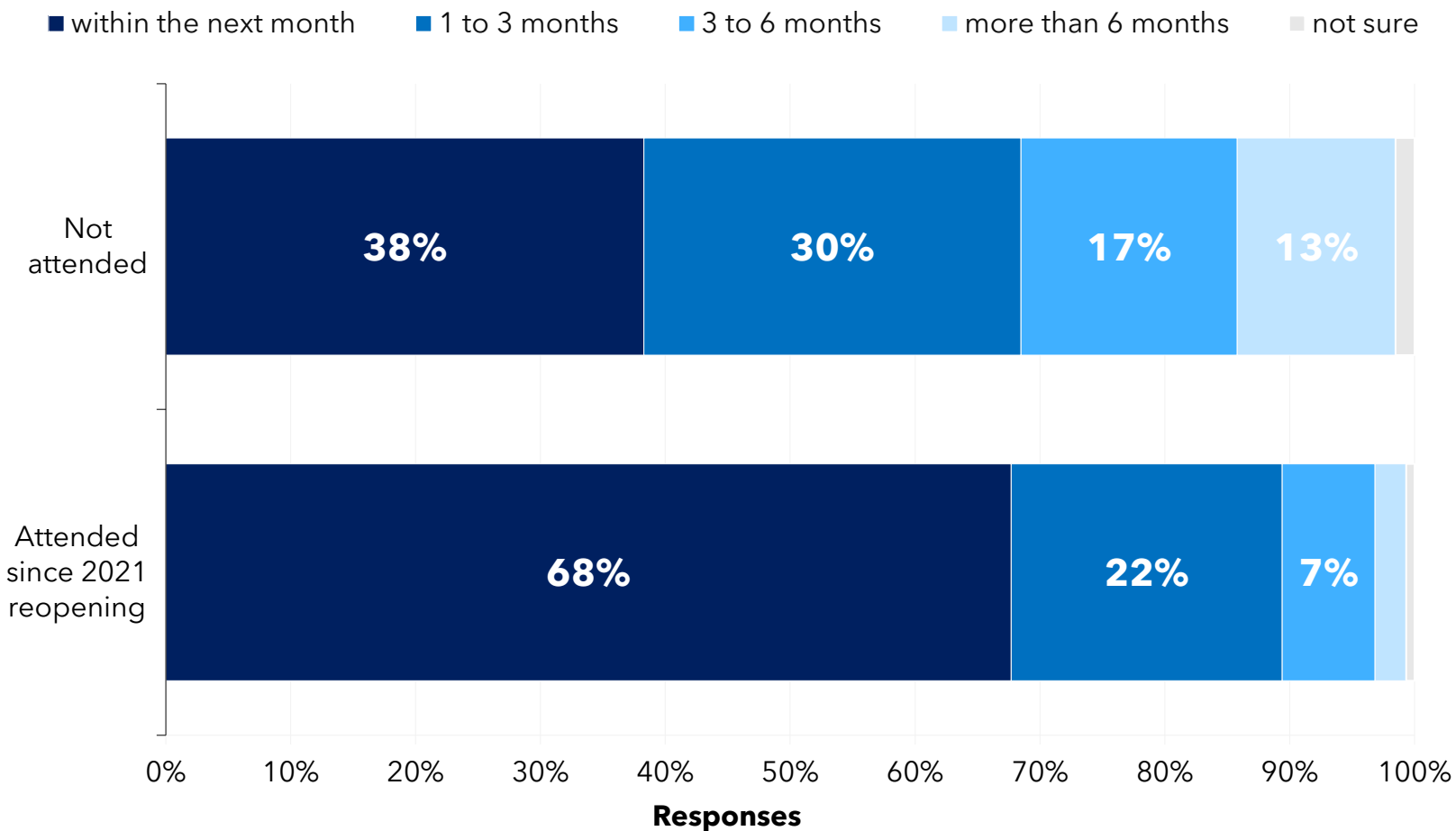


FUTURE BOOKINGS

- Previous returners are planning to attend sooner than those who'll be making their first visit

Wave 1 n = 10,834

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

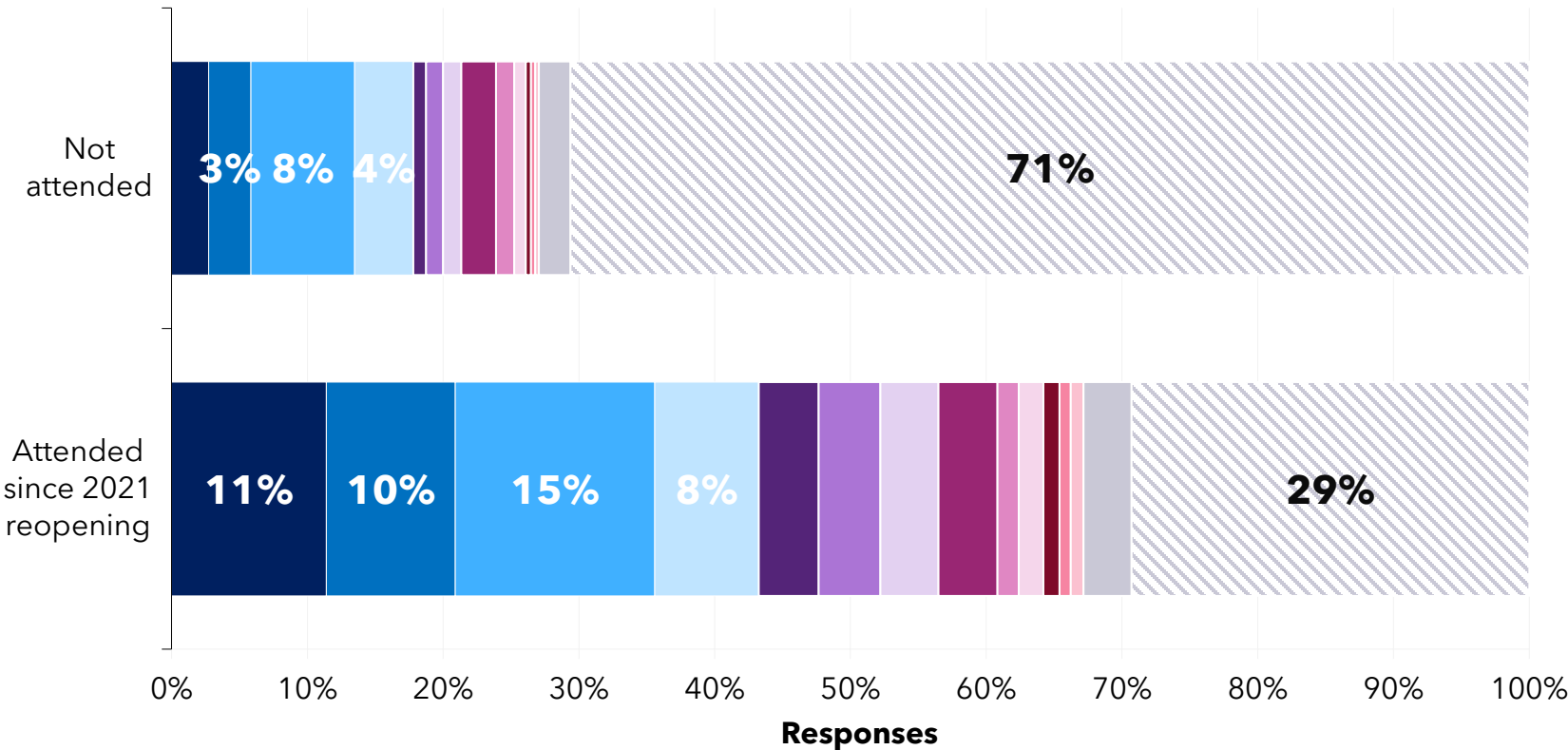


FUTURE BOOKINGS

Wave 1 n = 5,644

What artform or type of visit is it?

- Drama
- Music: Classical
- Music: Rock, Pop, Jazz or World
- Musical Theatre
- Film
- Exhibitions / Museums
- Opera
- Comedy
- Family / Children's performances
- Dance: Ballet
- Visual Arts
- Dance: Contemporary
- Outdoor Arts
- Other
- not booked

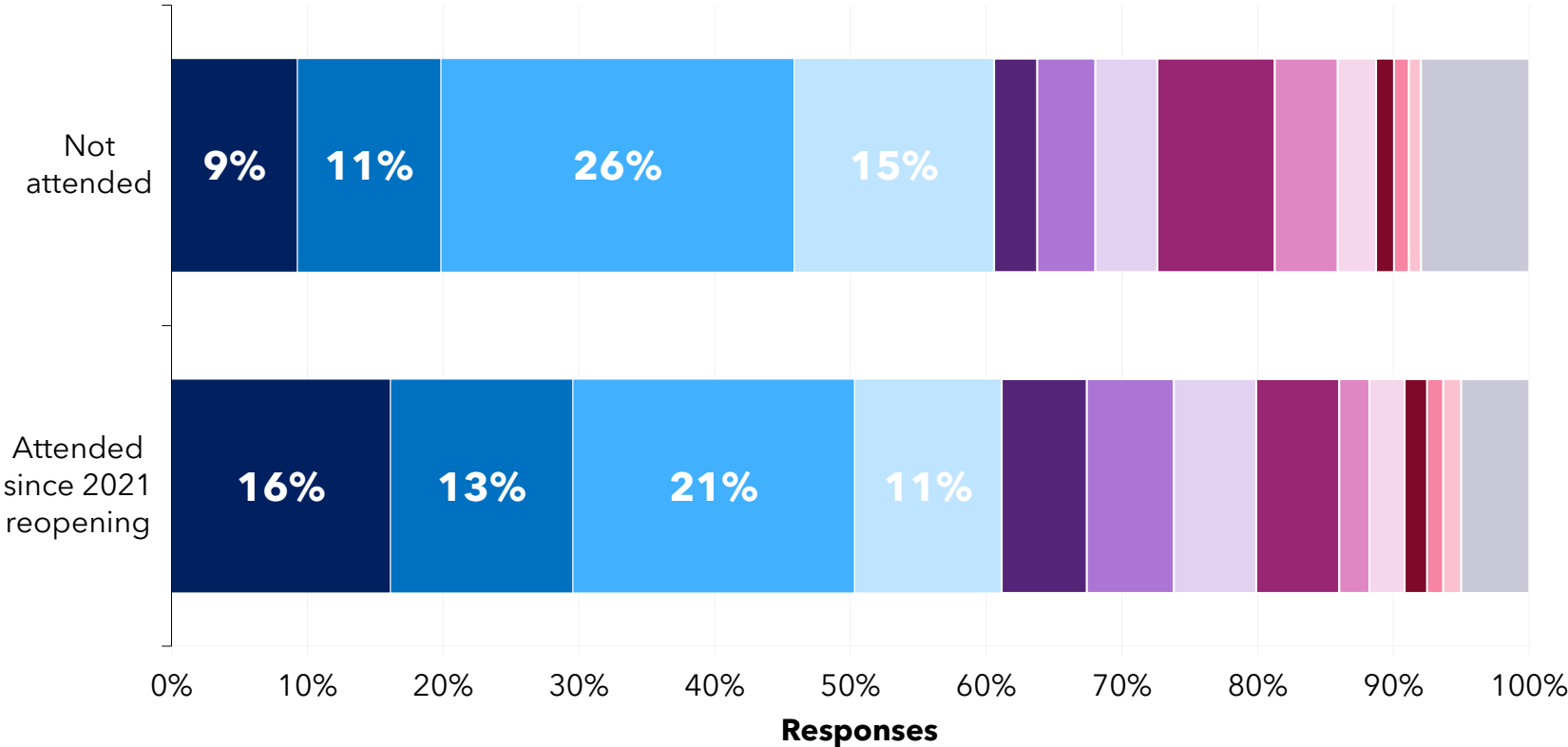


ARTFORM

Wave 1 n = 10,834

What artform or type of visit is it?

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- Family / Children's performances
- Dance: Ballet
- Visual Arts
- Dance: Contemporary
- Outdoor Arts
- Other

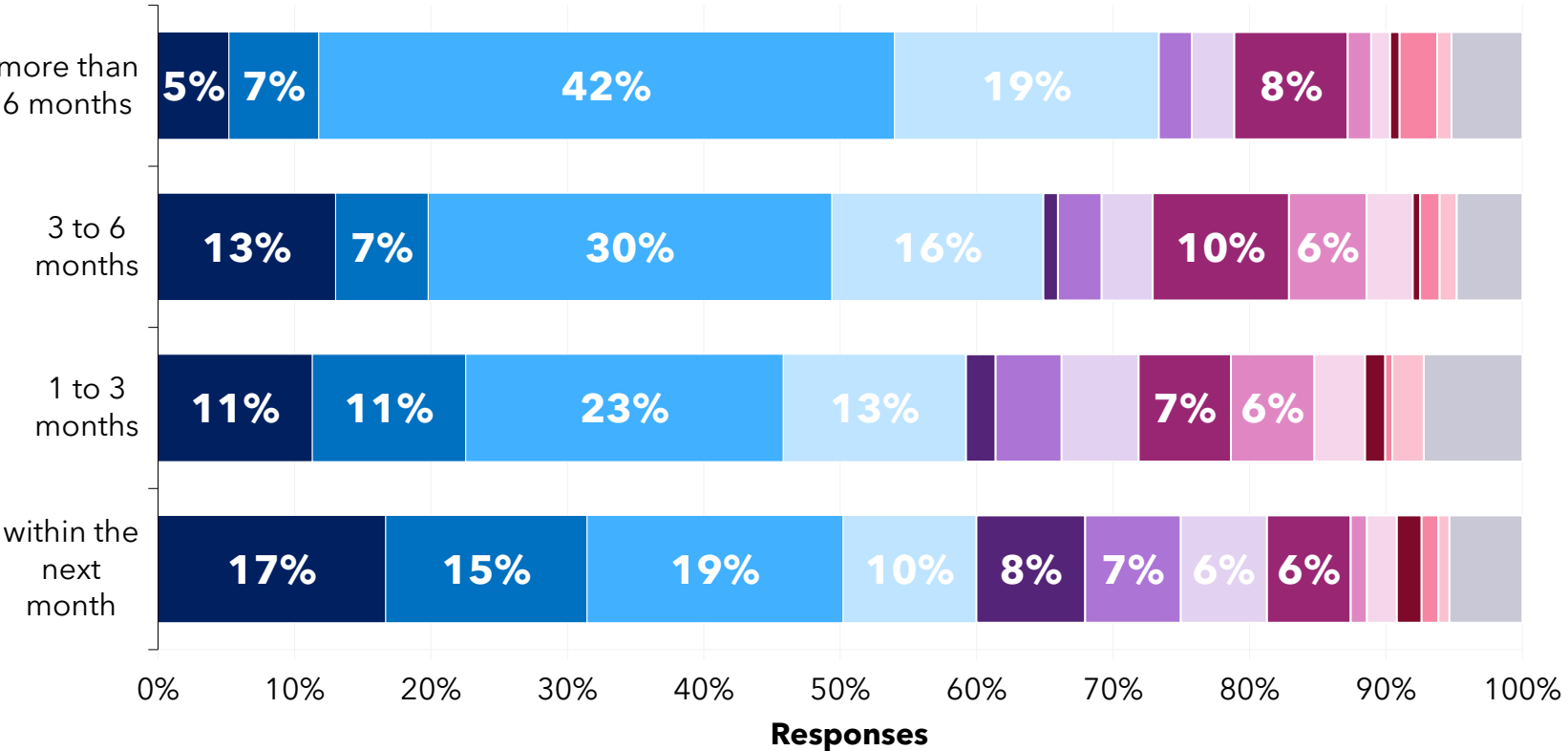


ARTFORM

Wave 1 n = 5,628

Time of next booking vs artform

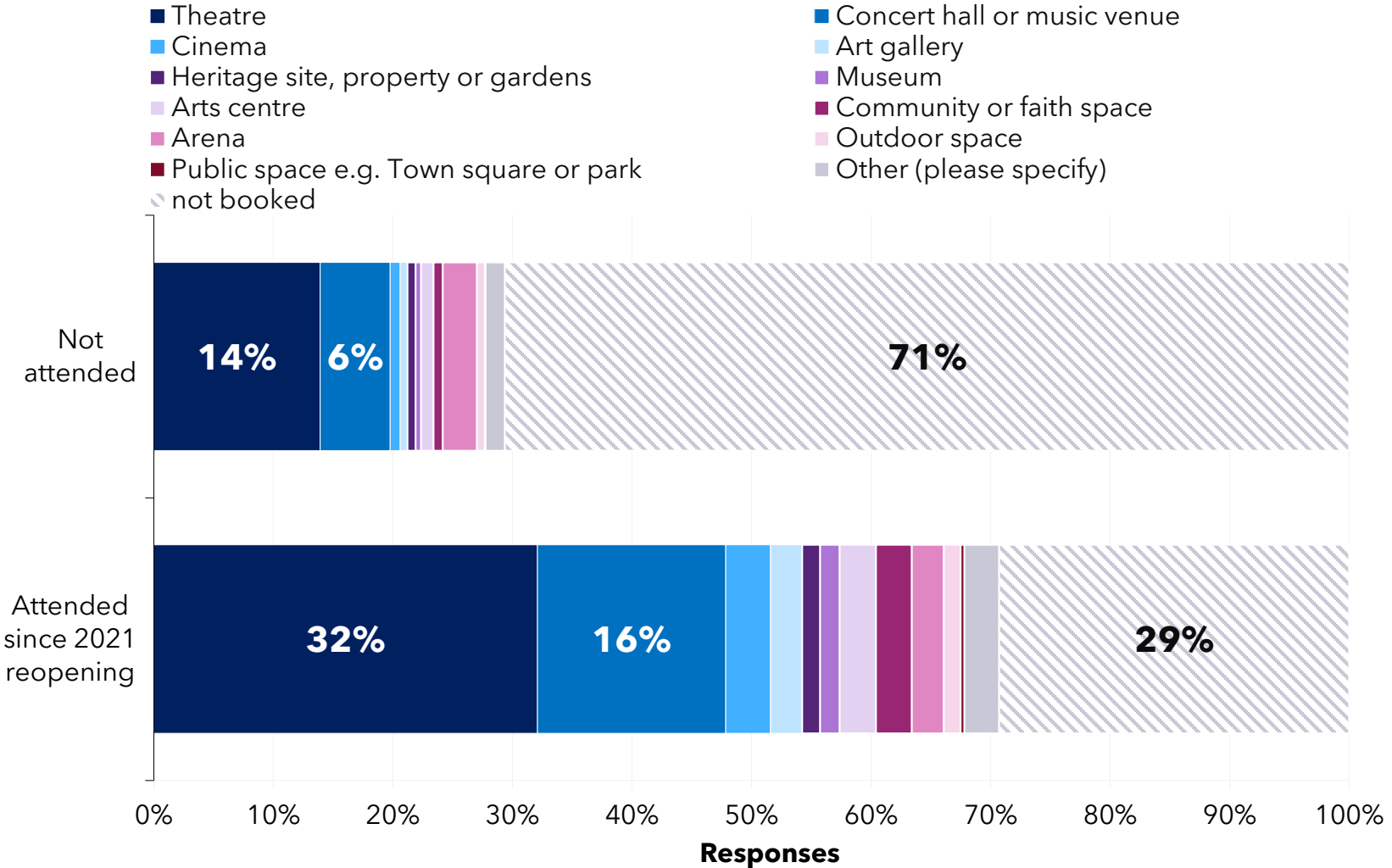
- Drama
- Music: Classical
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- Dance: Contemporary
- Outdoor Arts
- Other



ARTFORM

Next month n = 3,386
 1 to 3 months n = 1,344
 3 to 6 months n = 561
 Over 6 months n = 289

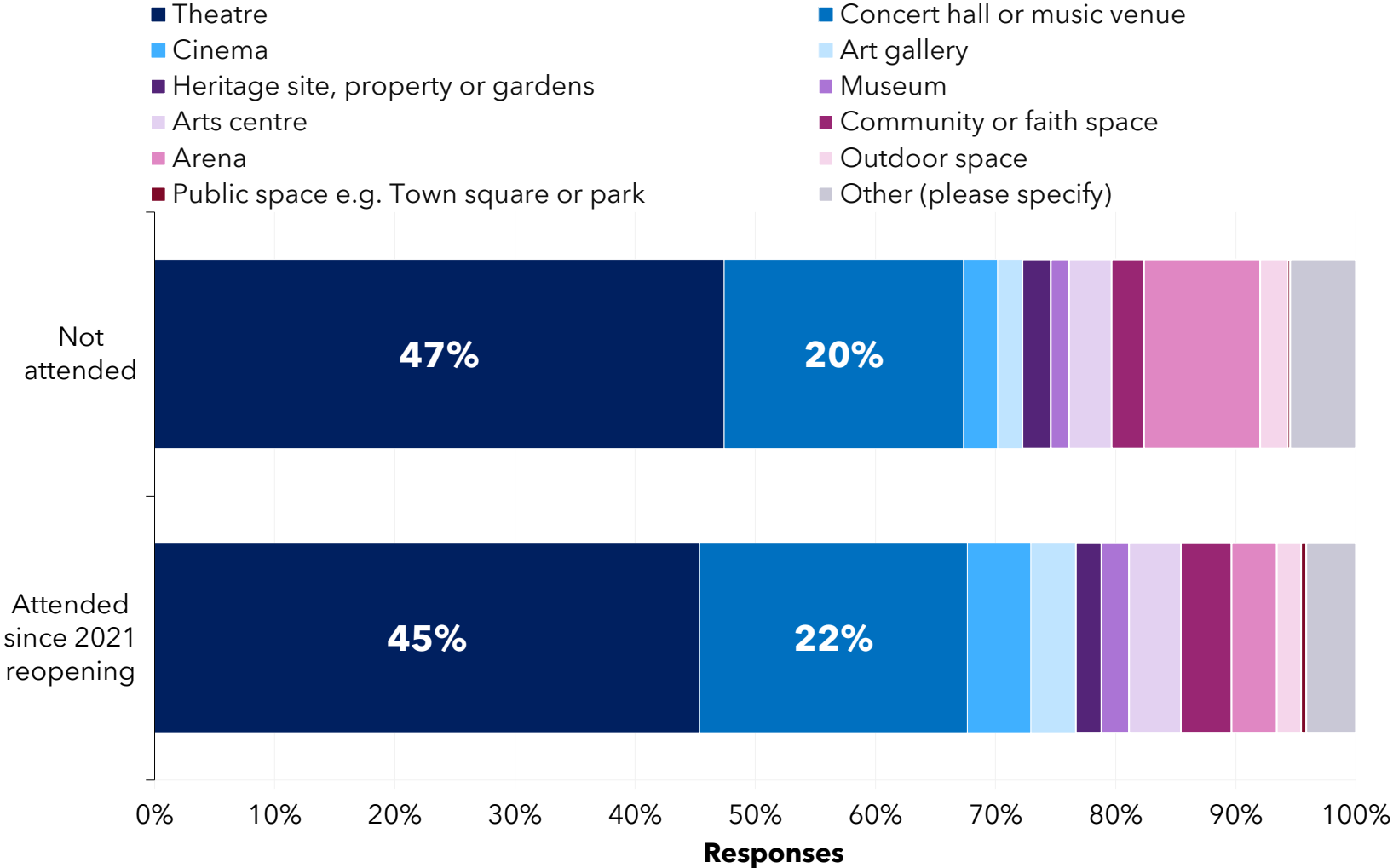
Where is it taking place?



VENUE

Wave 1 n = 10,834

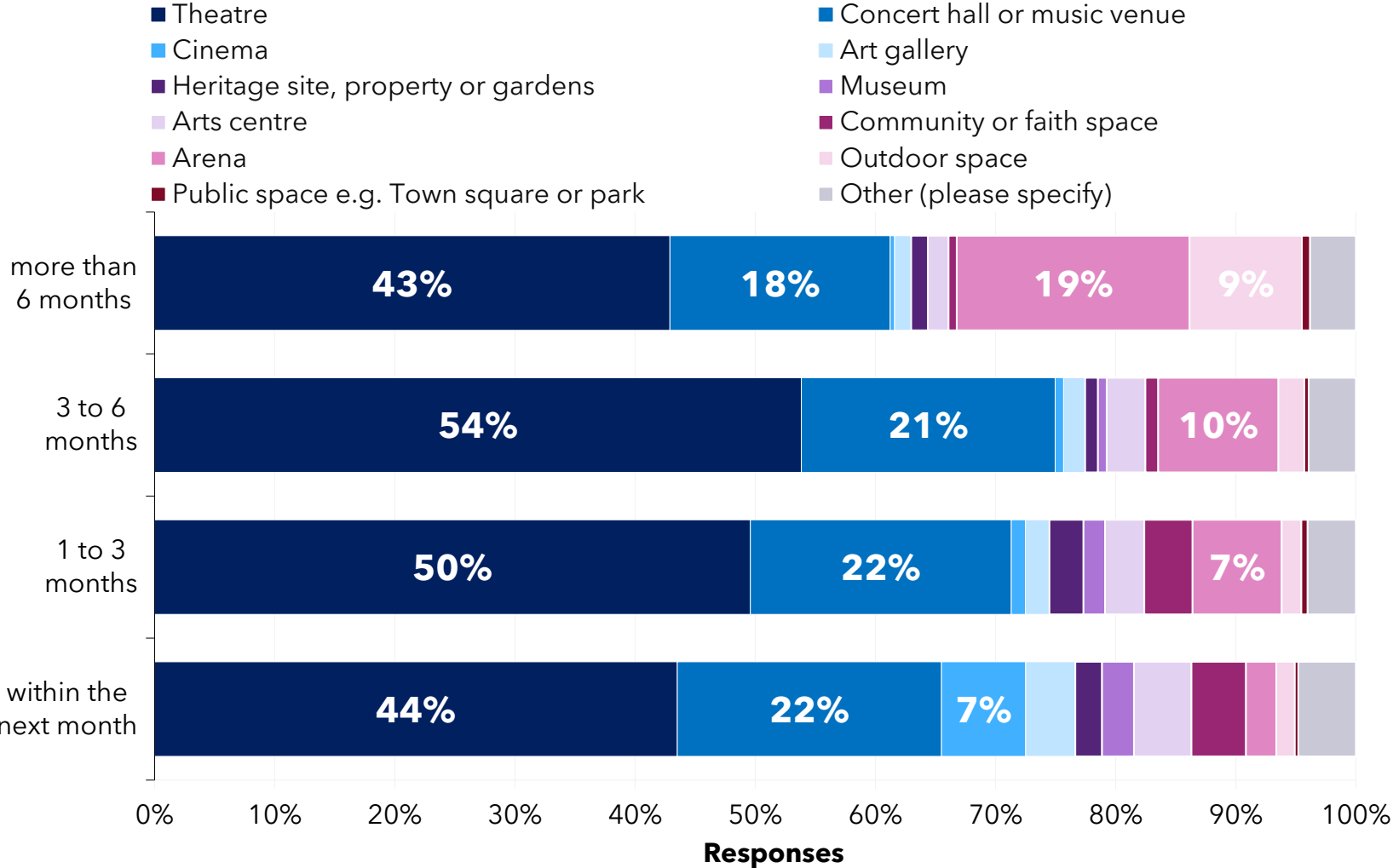
Where is it taking place?



VENUE

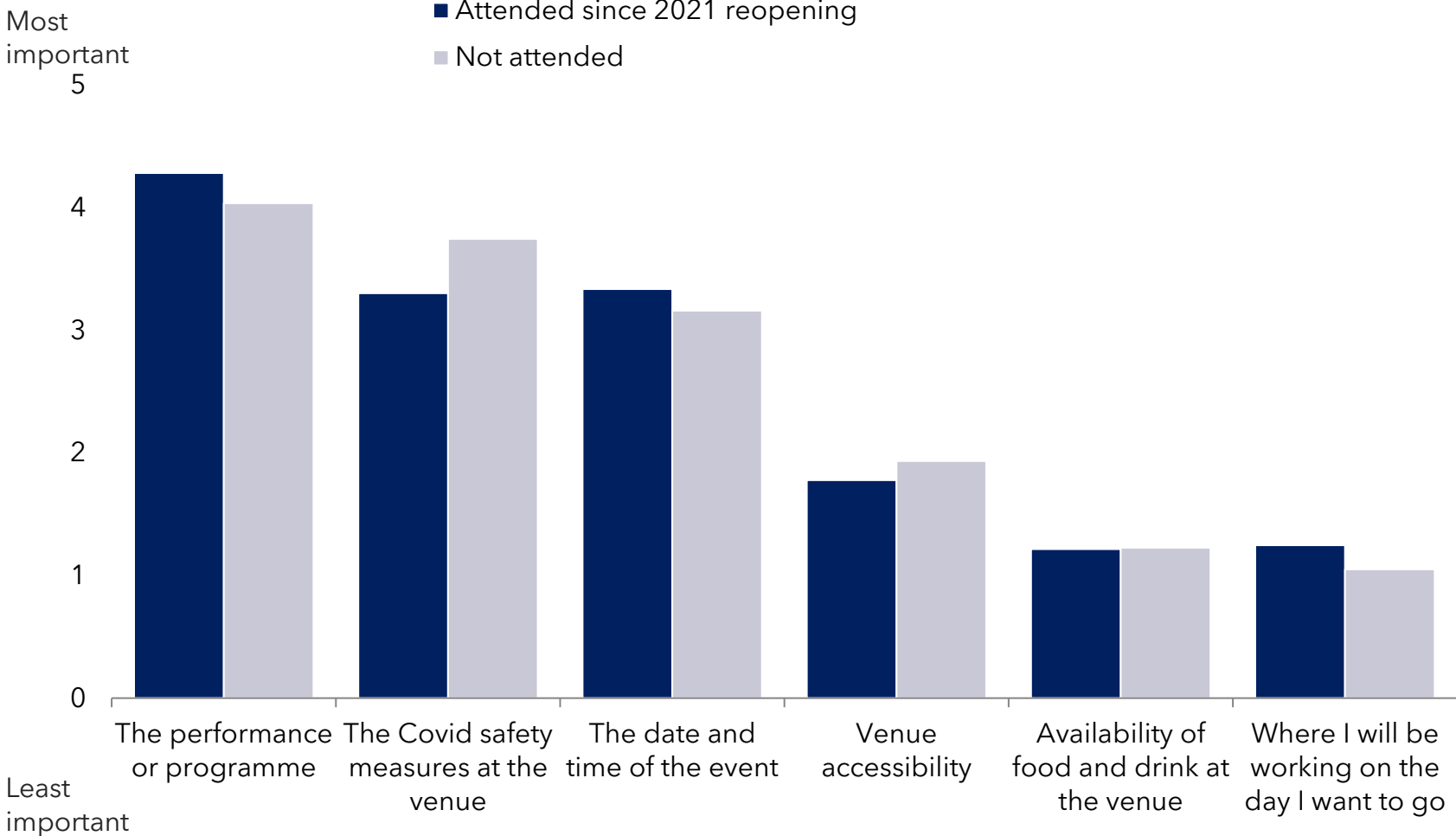

Wave 1 n = 5,628

Time of next booking vs venue



Next month n = 3,388
 1 to 3 months n = 1,345
 3 to 6 months n = 559
 Over 6 months n = 289

If you were considering booking a ticket for a cultural performance today, which of the following would you consider first? (Please rank in order of importance)

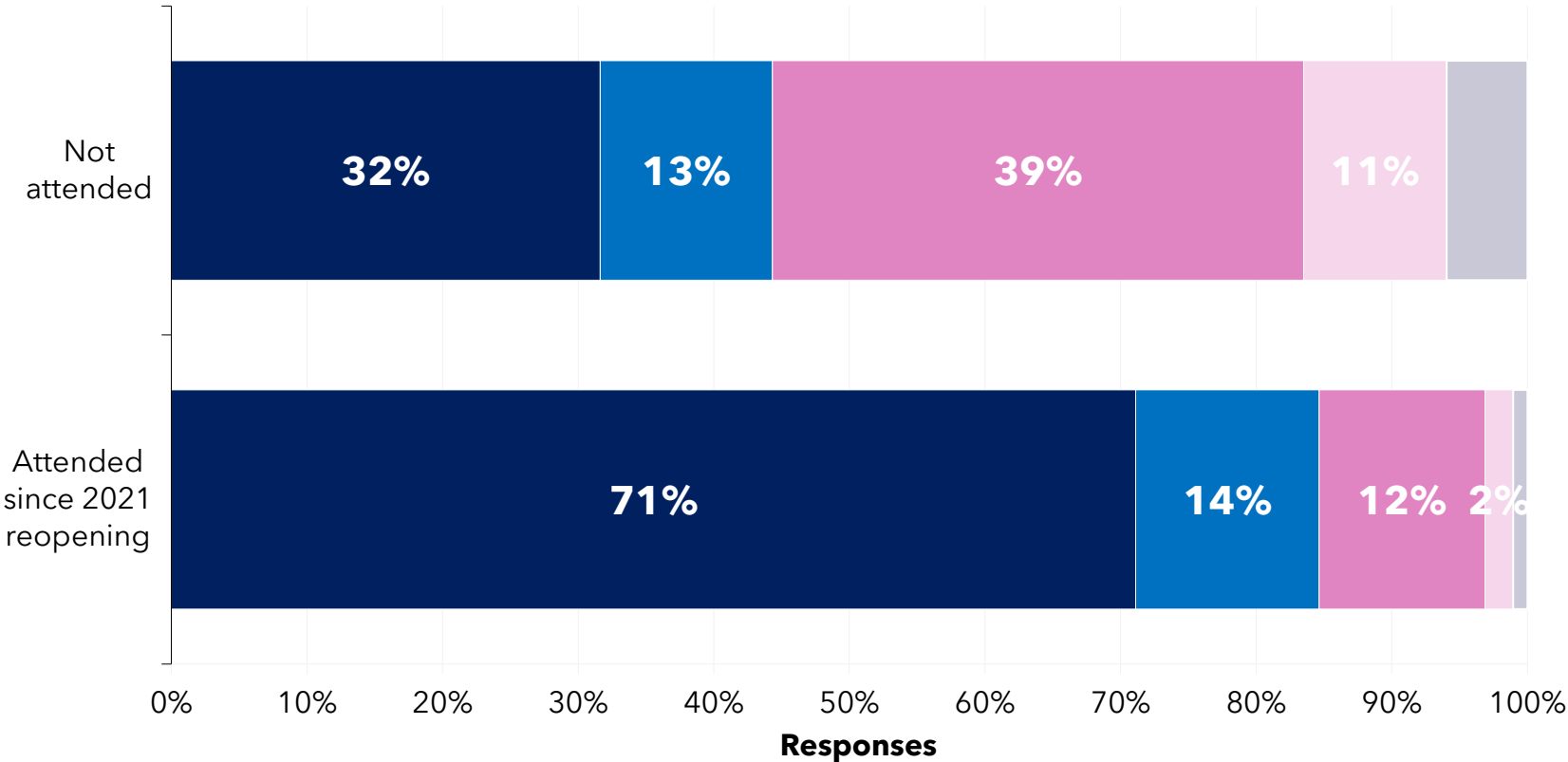



FUTURE BOOKINGS

Wave 1 n = 10,834

If you had to say now how you're feeling about booking or planning a visit, which of the options below would you choose? (please choose only ONE)

- Already Booked
- I'm happy to book or visit now if there's something I want to see
- I'd rather wait until the Covid risk is lower than it is now
- I'd rather wait until I can attend in the way I used to before Covid
- I'm not planning to book or visit at all



FUTURE BOOKINGS

Wave 1 n = 10,834

Venue safety measures

Regardless of government guidance, how would the following measures, if implemented by the venue, affect your likelihood of booking for another event or making a visit as of today?

- Much more likely to attend
- More likely to attend
- Neutral
- Less likely to attend
- Much less likely to attend



SAFETY MEASURES

Wave 1 n = 10,572

Regardless of government guidance, how would the following measures, if implemented by the venue, affect your likelihood of booking for another event or making a visit as of today?

- Much more likely to attend
- More likely to attend
- Neutral
- Less likely to attend
- Much less likely to attend

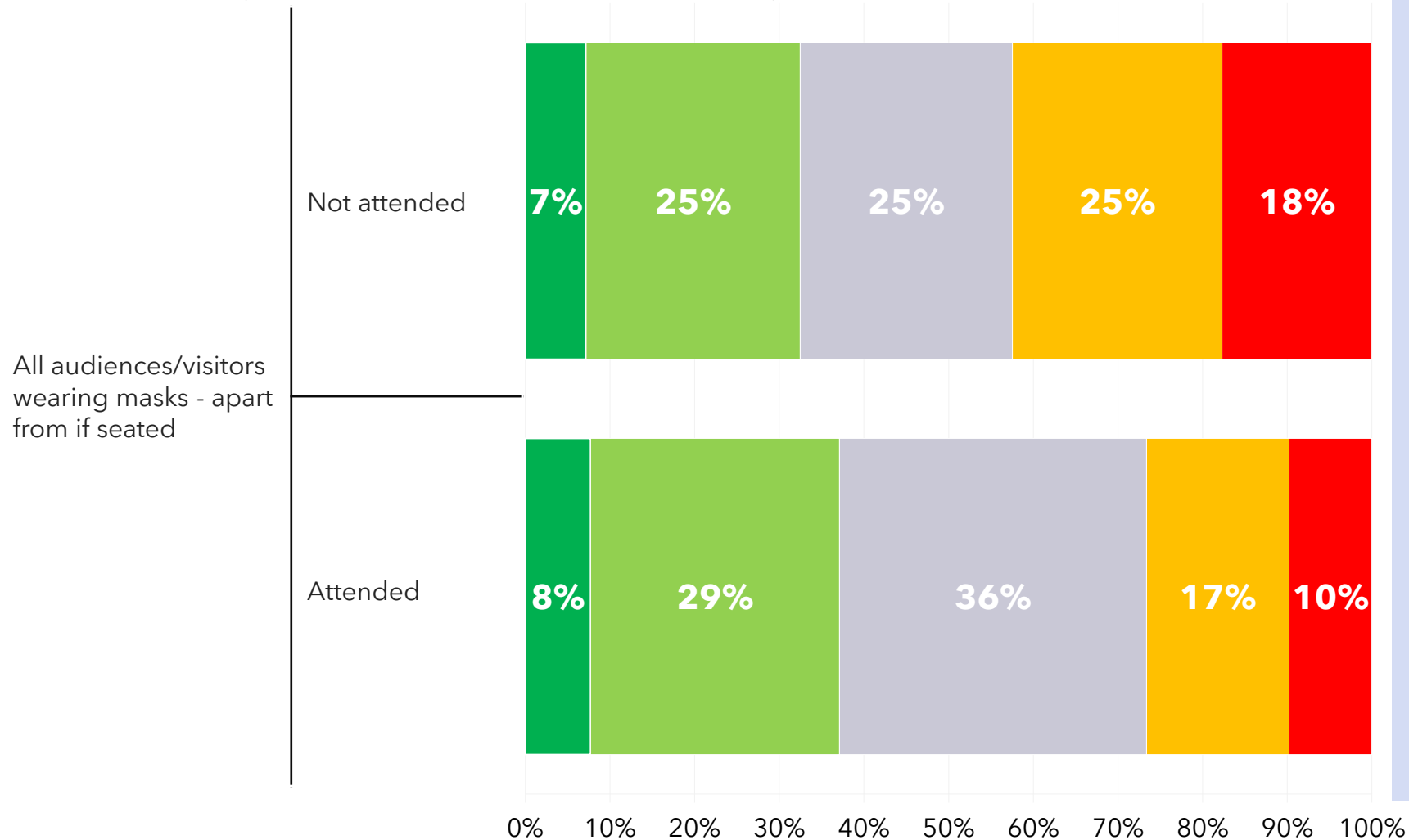



SAFETY MEASURES

Wave 1 n = 10,572

Regardless of government guidance, how would the following measures, if implemented by the venue, affect your likelihood of booking for another event or making a visit as of today?

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- More likely to attend
- Neutral
- Less likely to attend
- Much less likely to attend

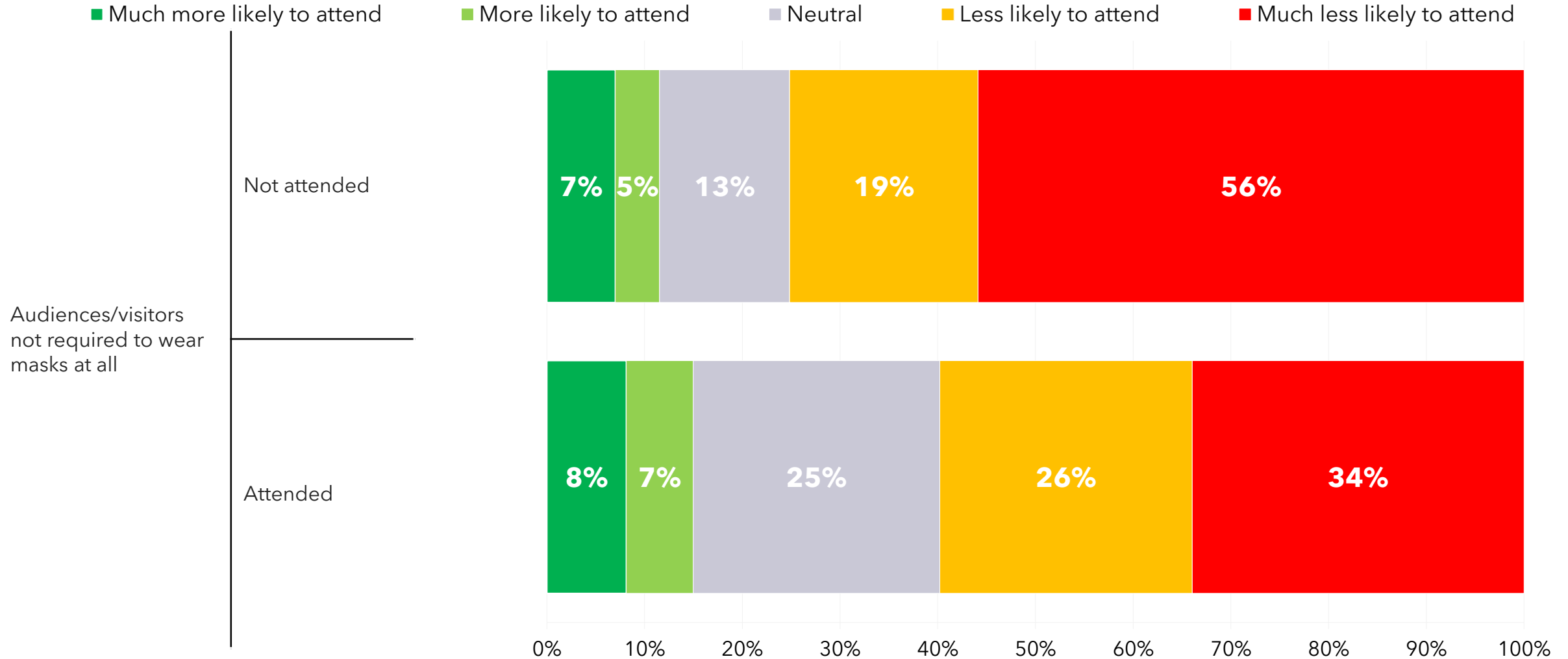




SAFETY MEASURES

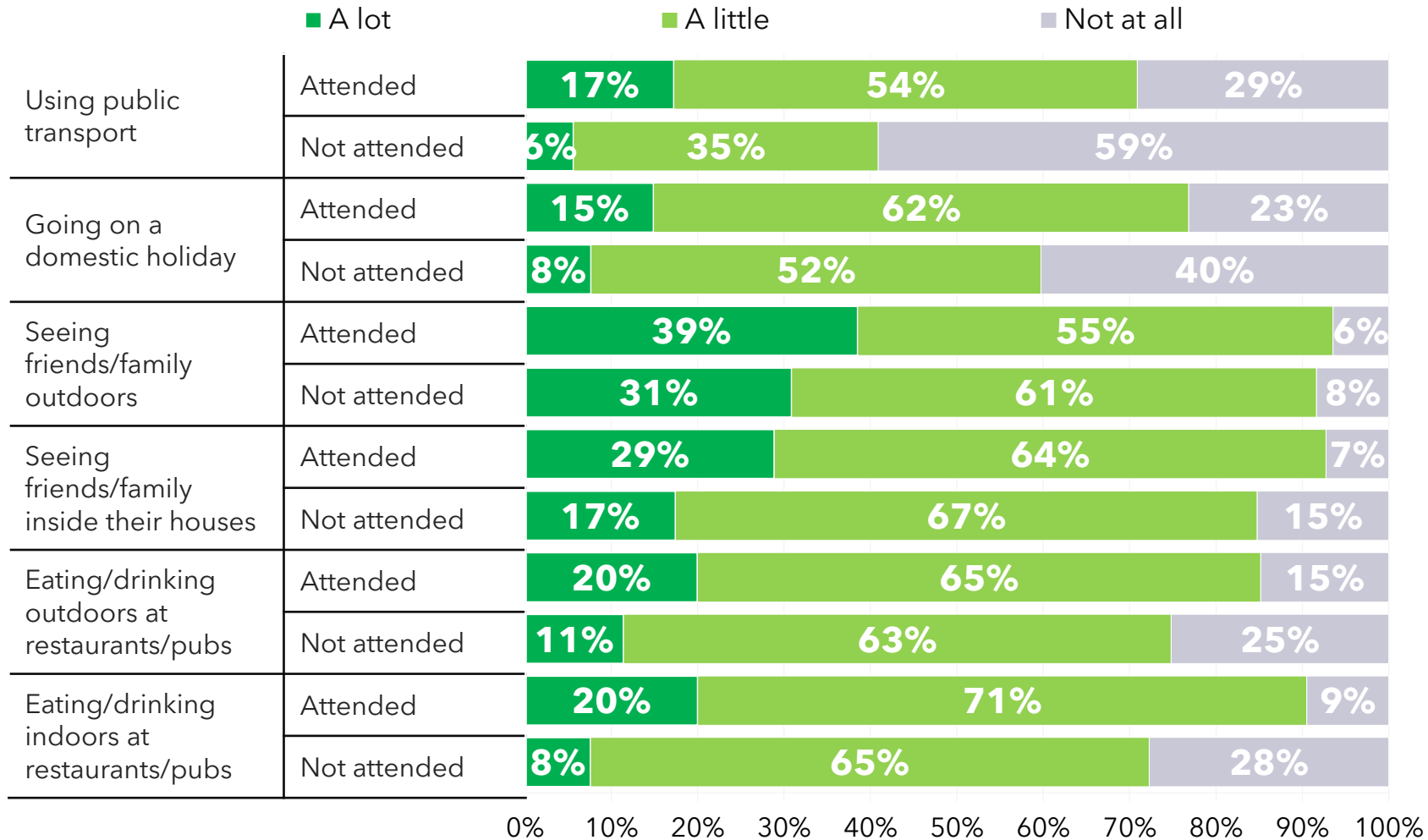
Wave 1 n = 10,572

Regardless of government guidance, how would the following measures, if implemented by the venue, affect your likelihood of booking for another event or making a visit as of today?



Other leisure and social activities

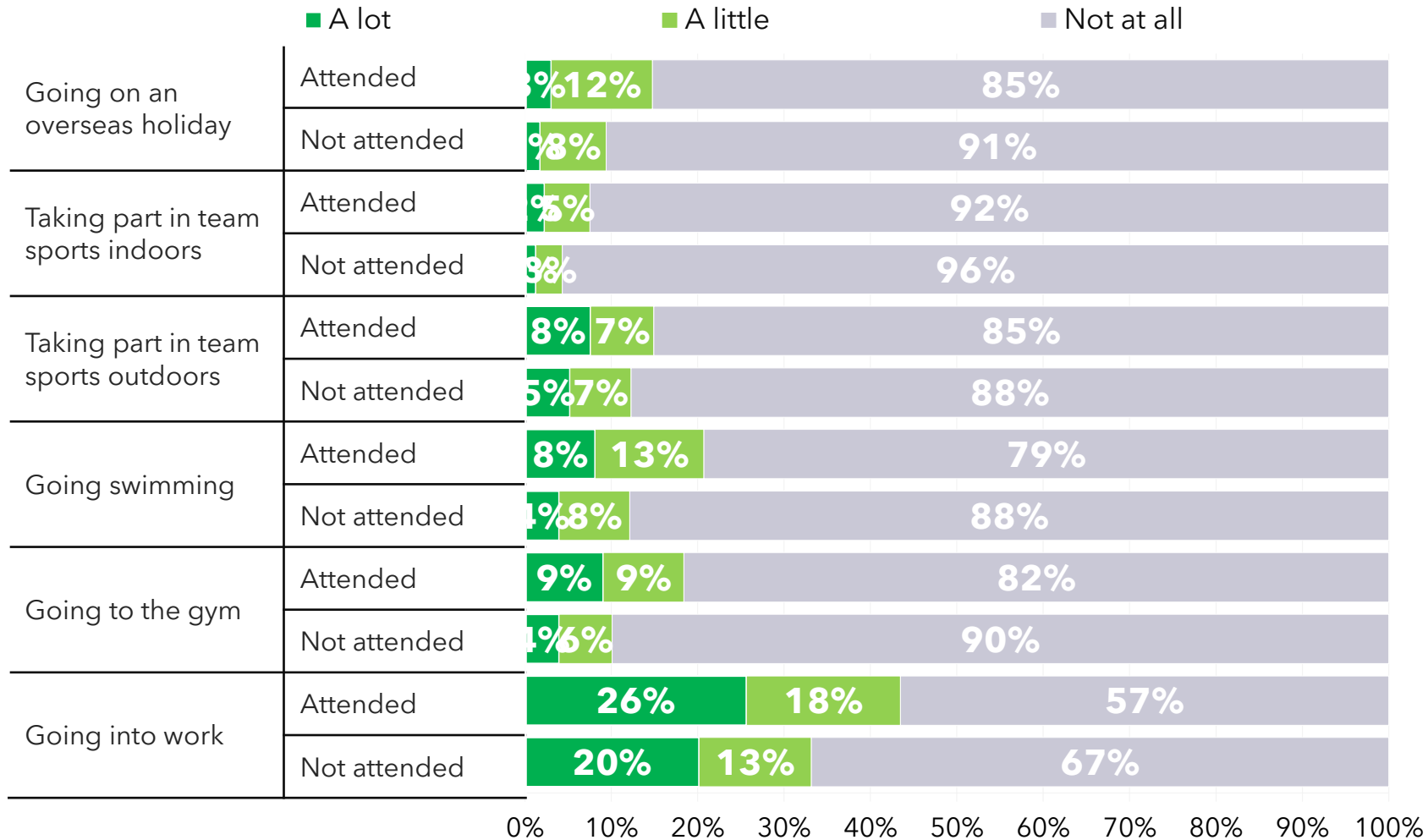
Which of the following have you managed to do in the last few months?



ATTENDANCE

Wave 1 n = 10,724

Which of the following have you managed to do in the last few months?

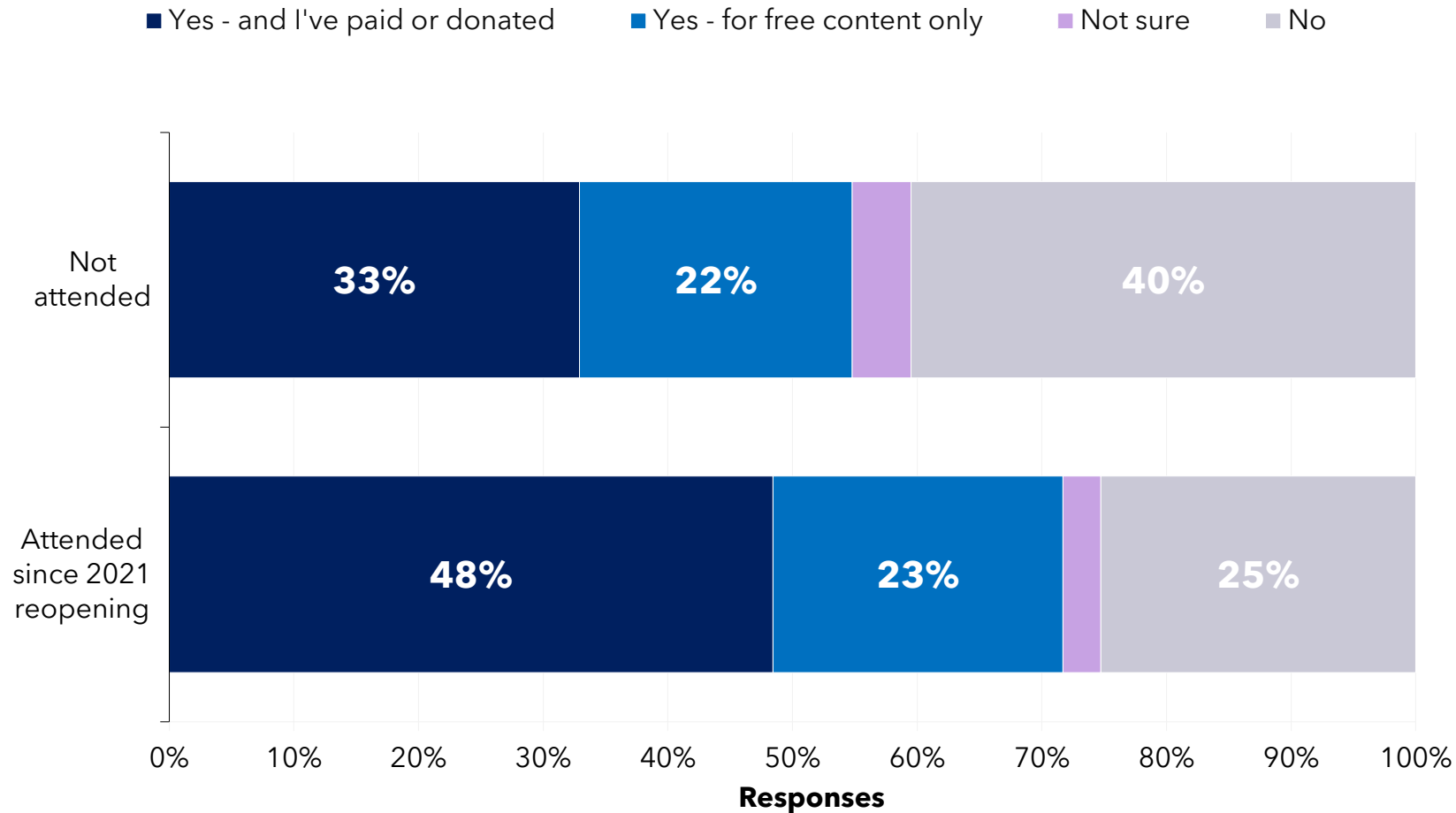


ATTENDANCE

Wave 1 n = 10,724

Online Culture

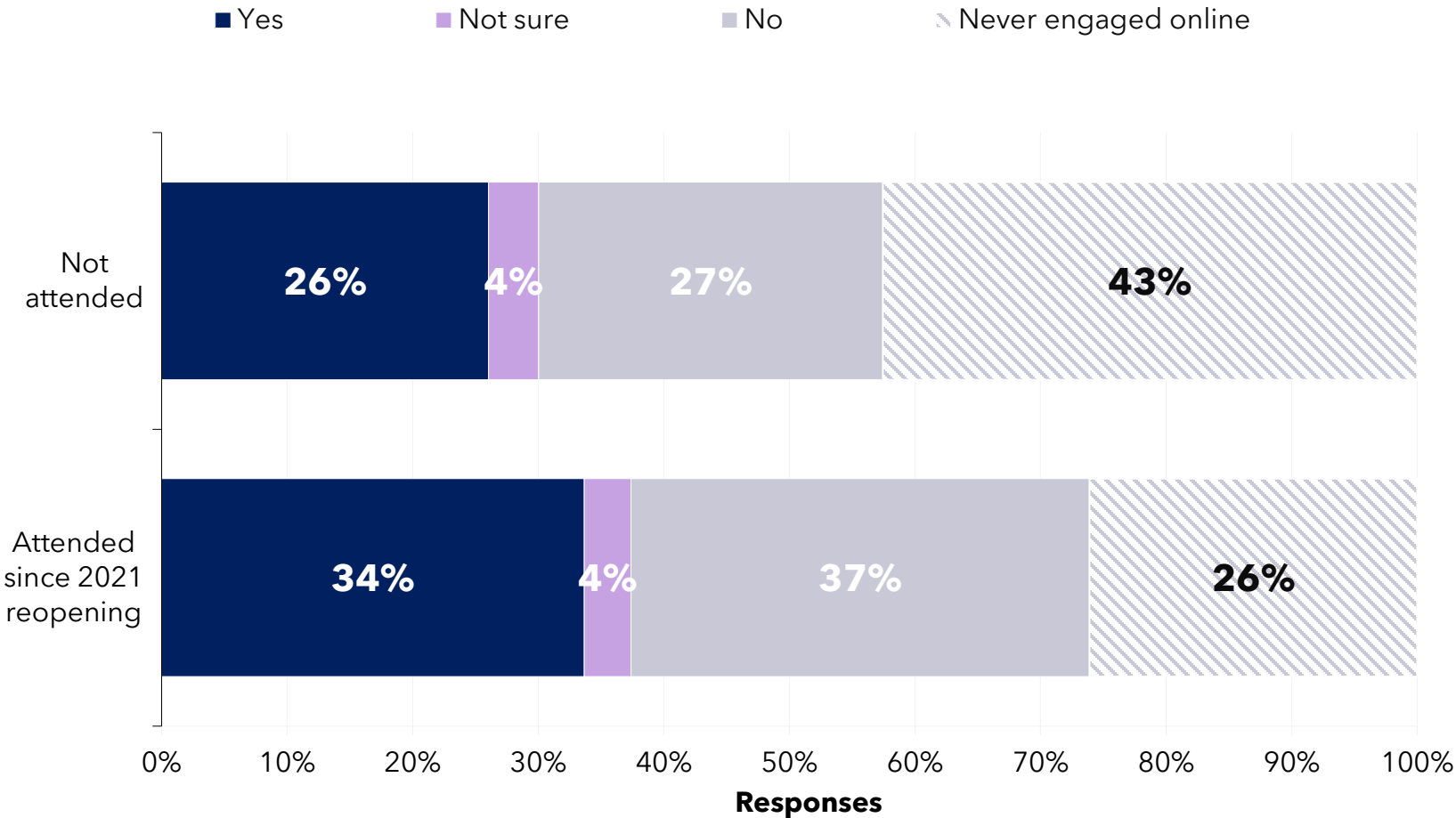
Have you ever engaged with any culture ONLINE?




DIGITAL
ENGAGEMENT

Wave 1 n = 10,834

Have you engaged with culture online since cultural venues reopened in 2021?

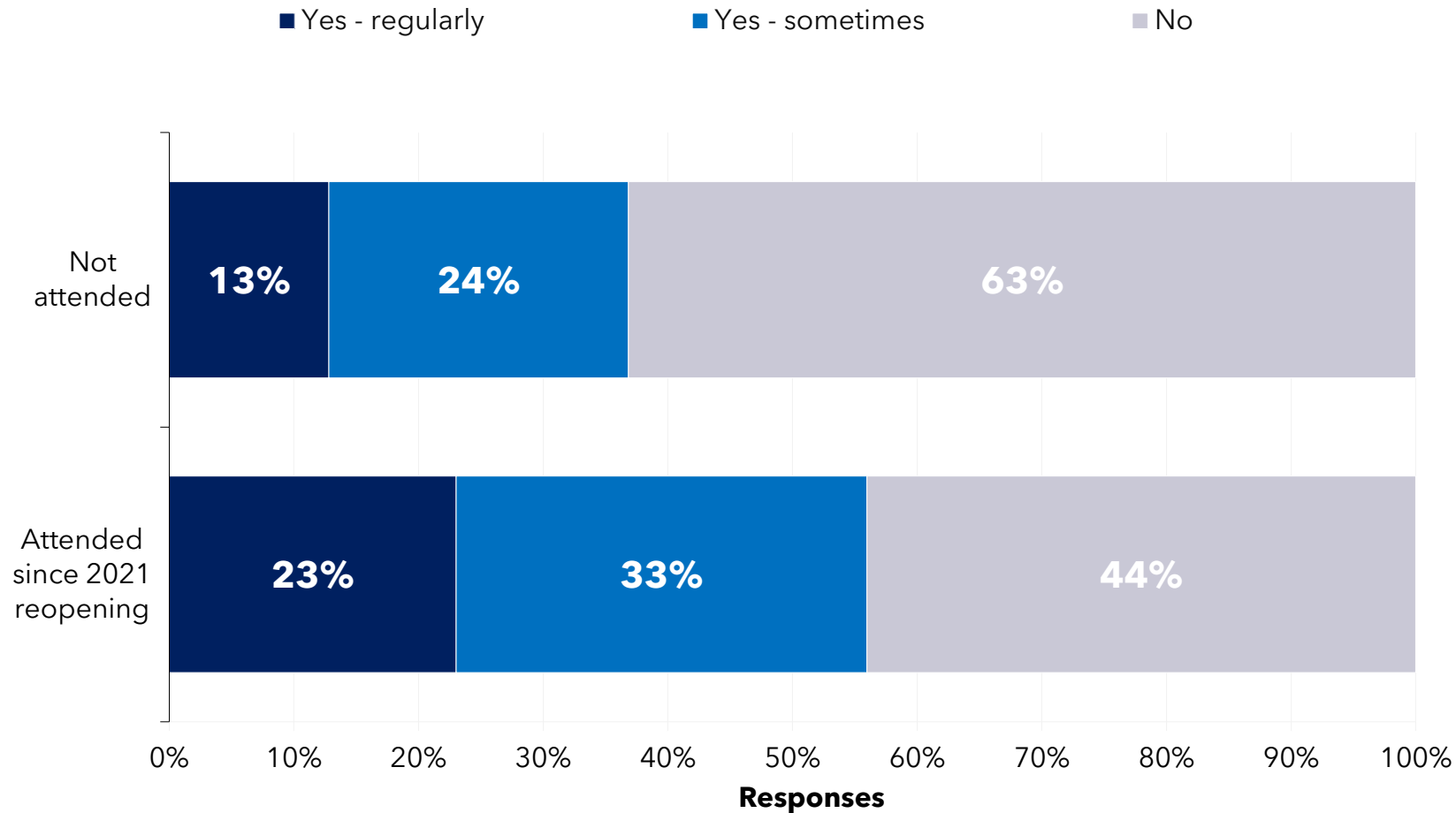



DIGITAL
ENGAGEMENT

Wave 1 n = 10,406

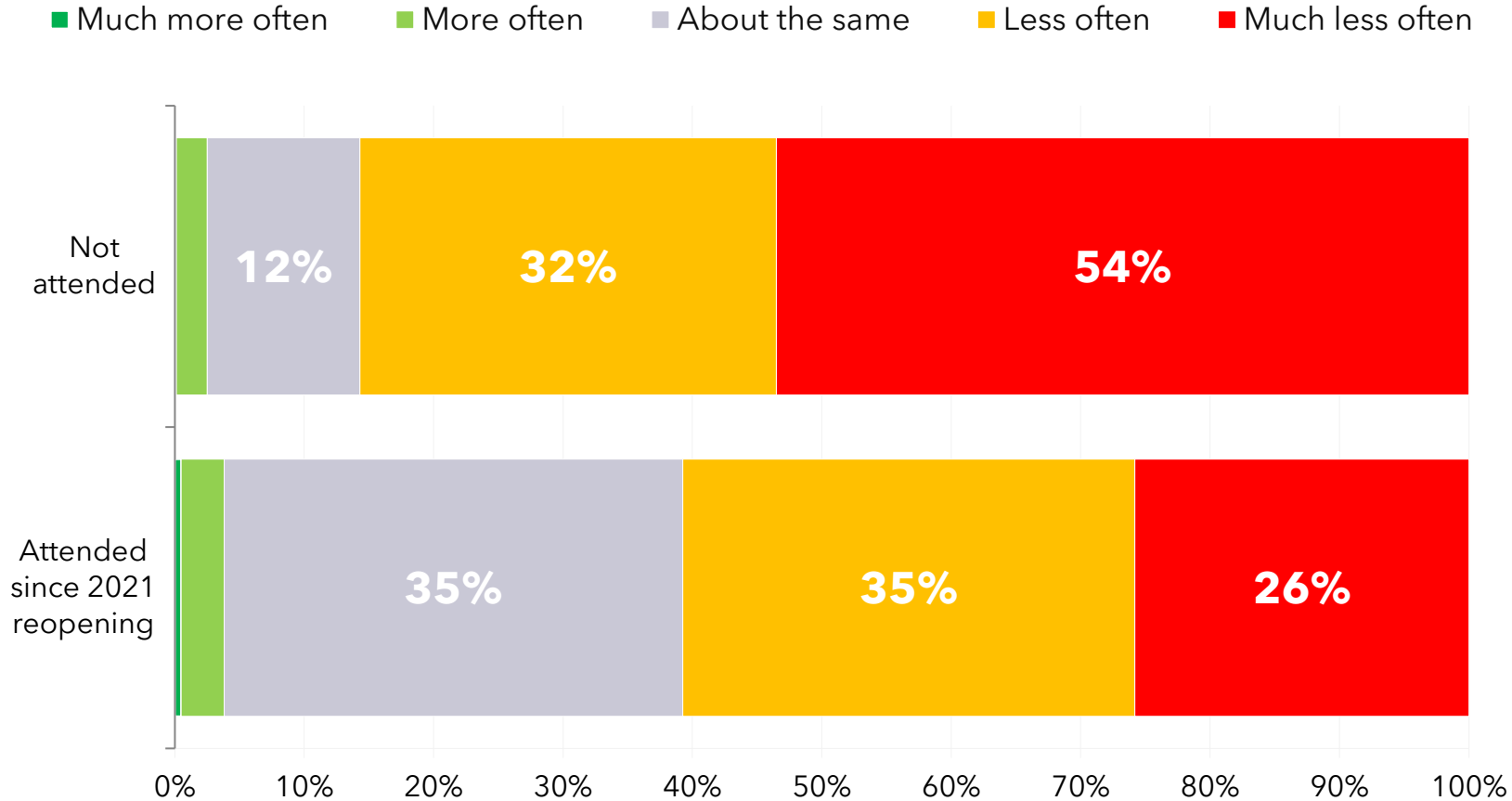
Travel into London

Before Covid, did you regularly travel into central London, either for work or to attend cultural venues?



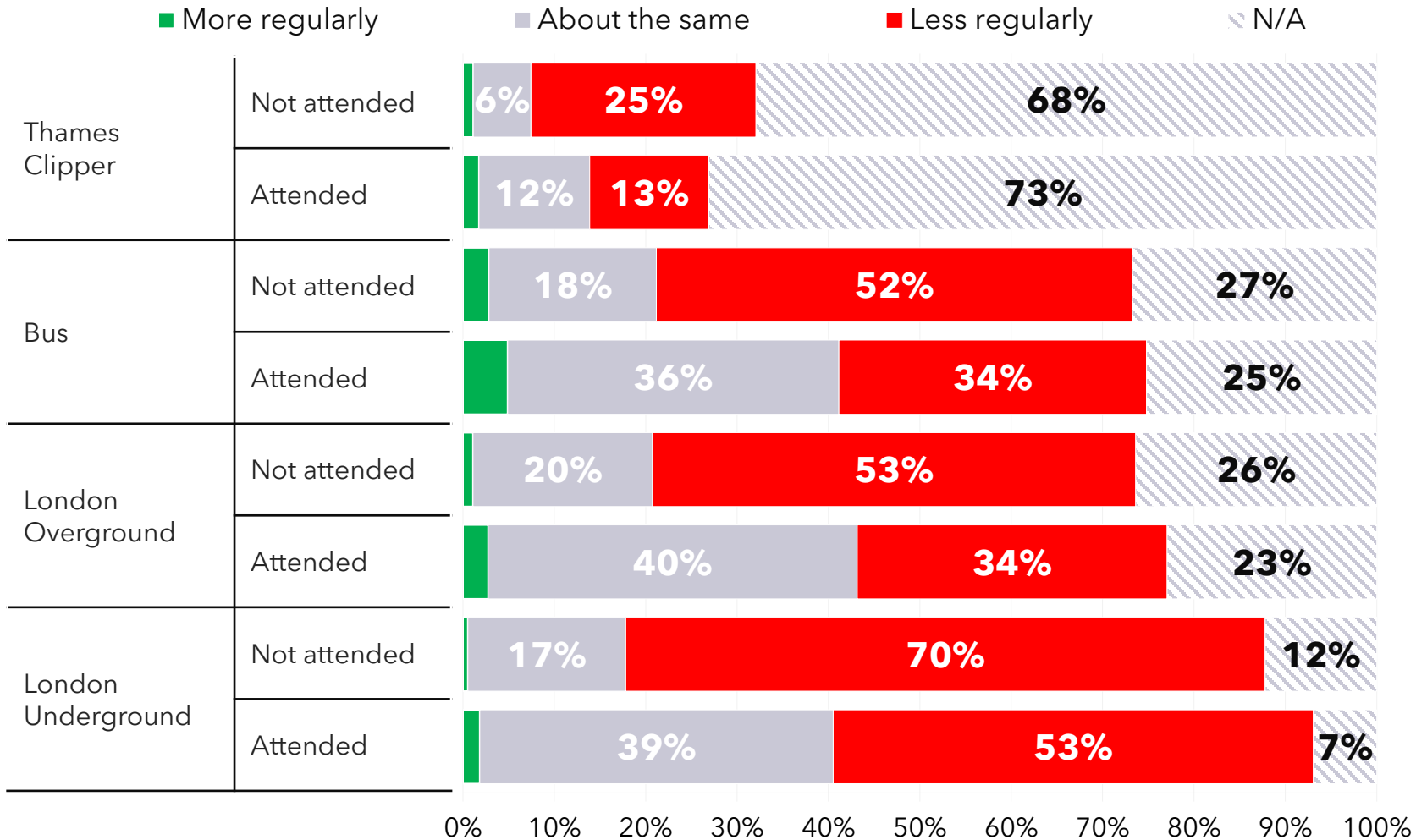
Wave 1 n = 4,614

Of those who did travel into London... In the next 12 months, do you expect to travel into central London more or less regularly than you did before Covid?



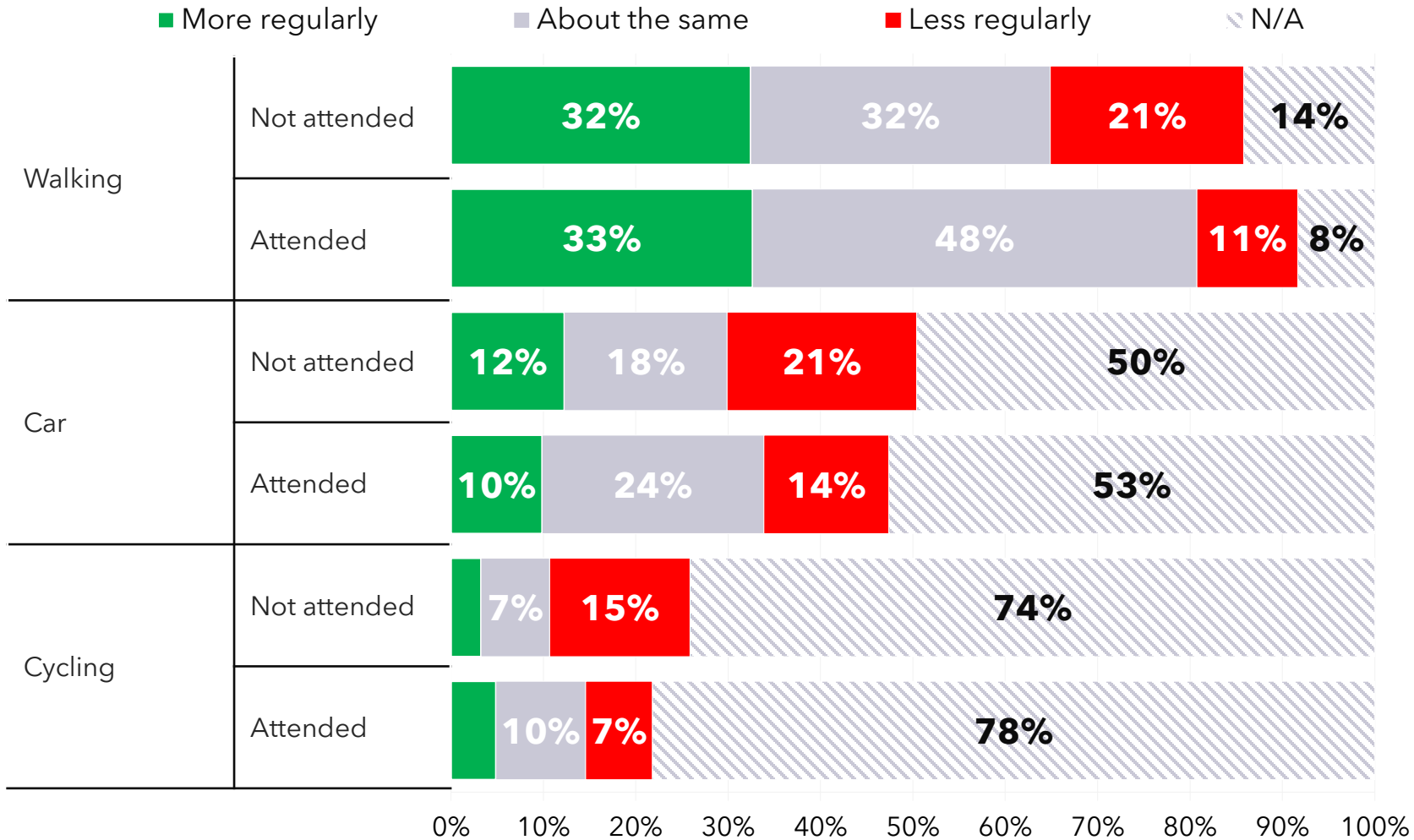
Wave 1 n = 2,169

In the next 12 months, how regularly do you think you will use the following modes of transport in central London compared with pre-Covid?



Wave 1 n = 2,160

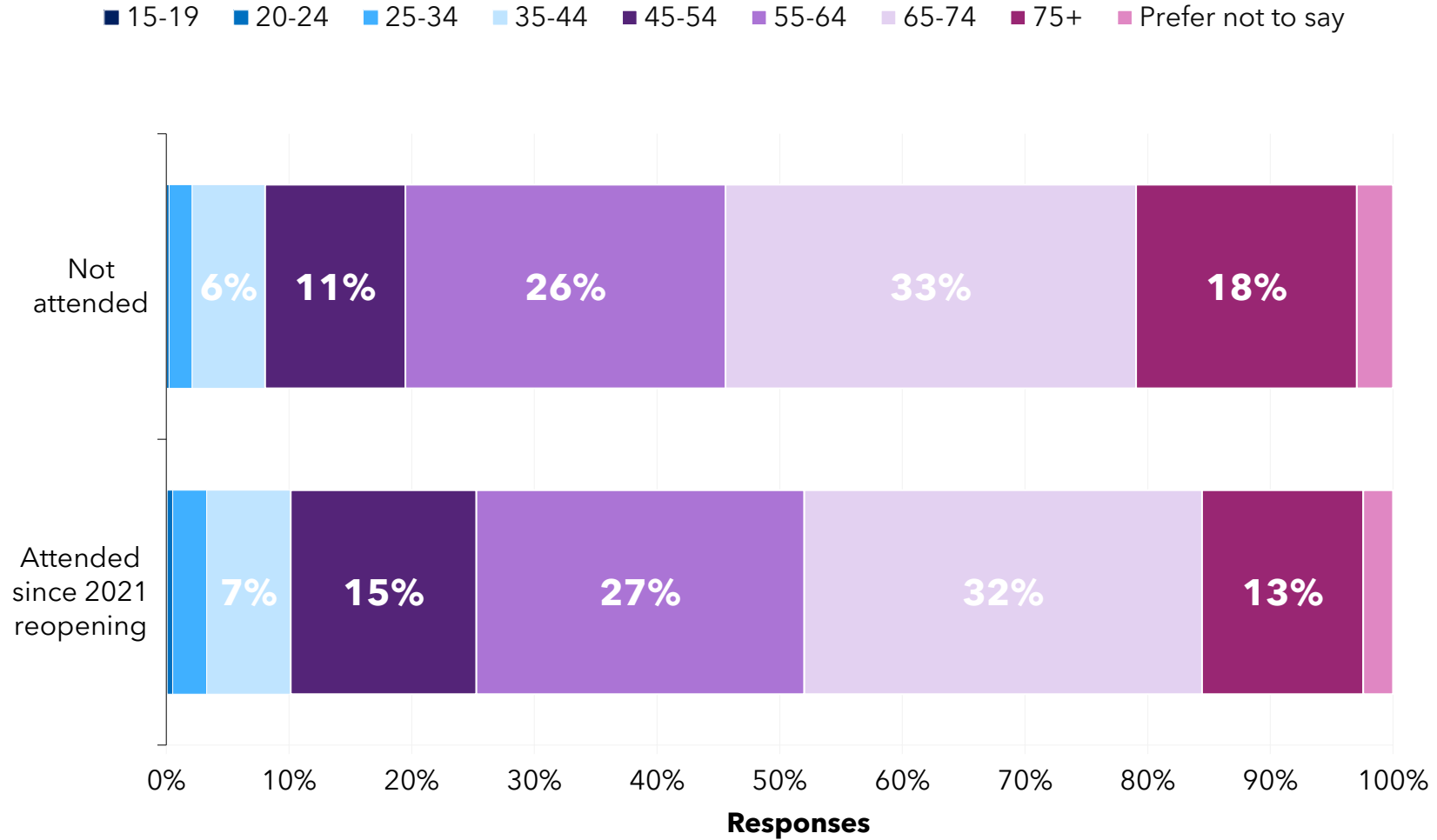
In the next 12 months, how regularly do you think you will use the following modes of transport in central London compared with pre-Covid?



Wave 1 n = 2,160

Demographics

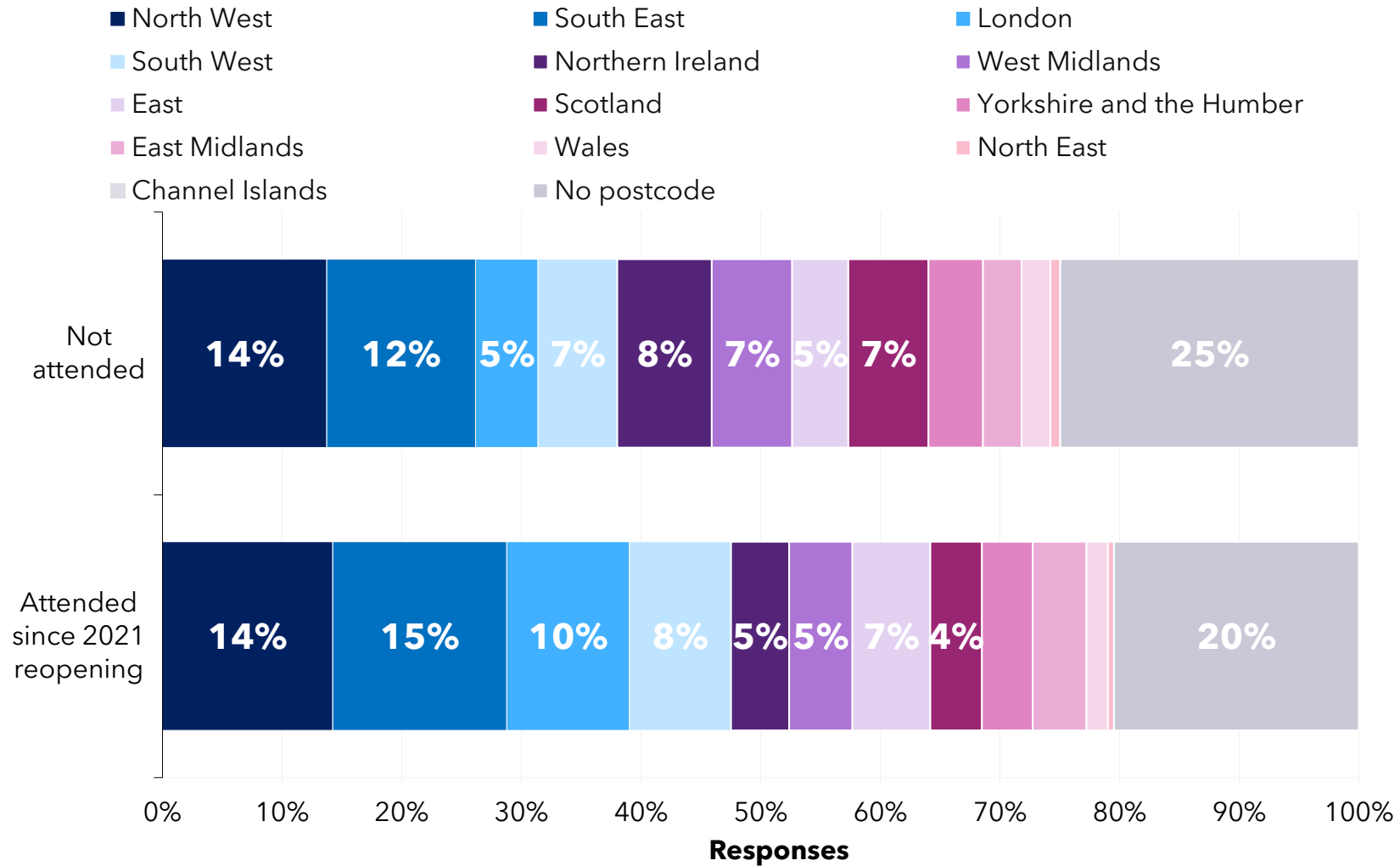
Respondents by age



AGE

Wave 1 n = 10,834

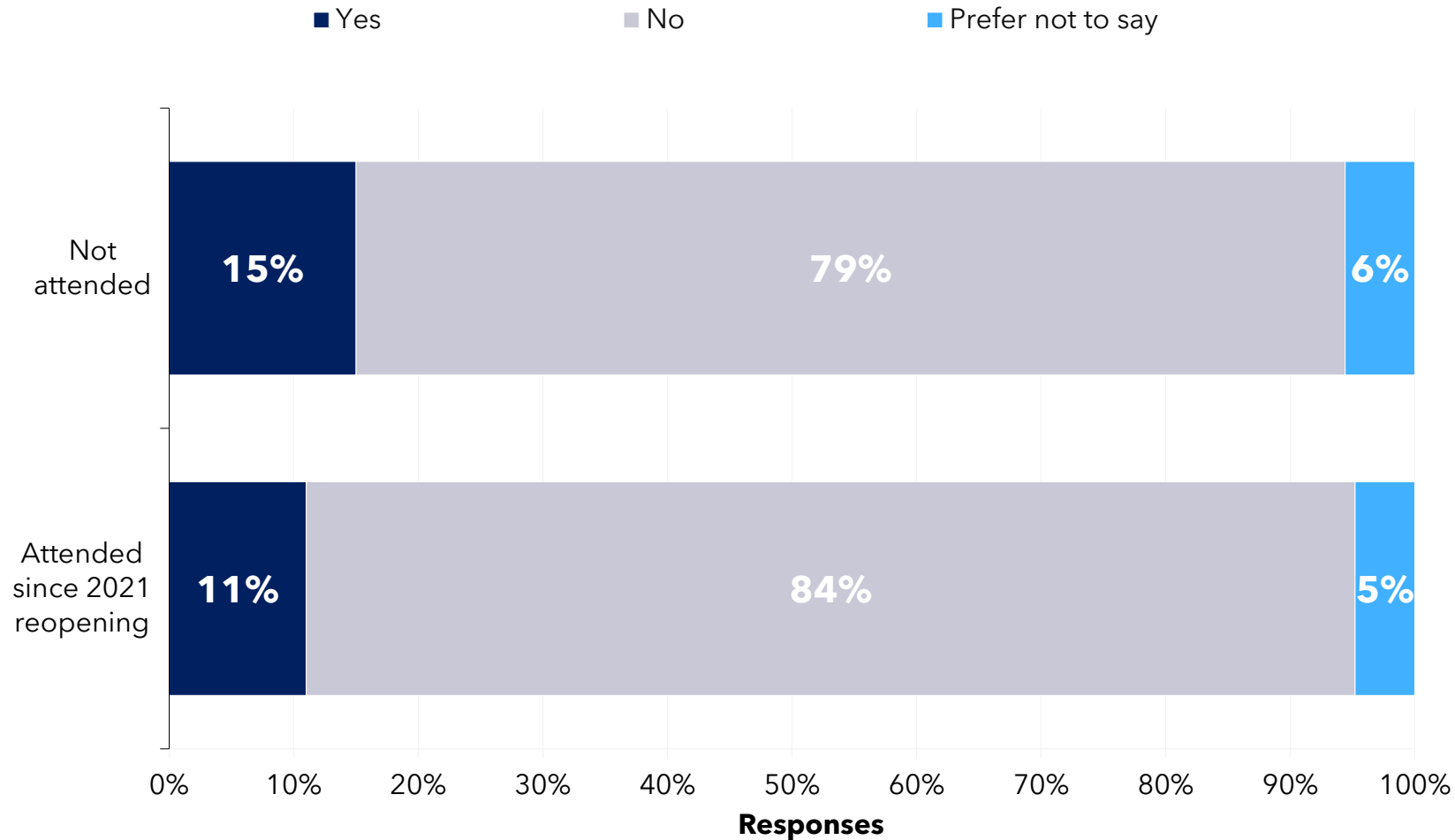
Respondents by region



REGION

Wave 1 n = 10,834

Respondents by D/deaf and disabled

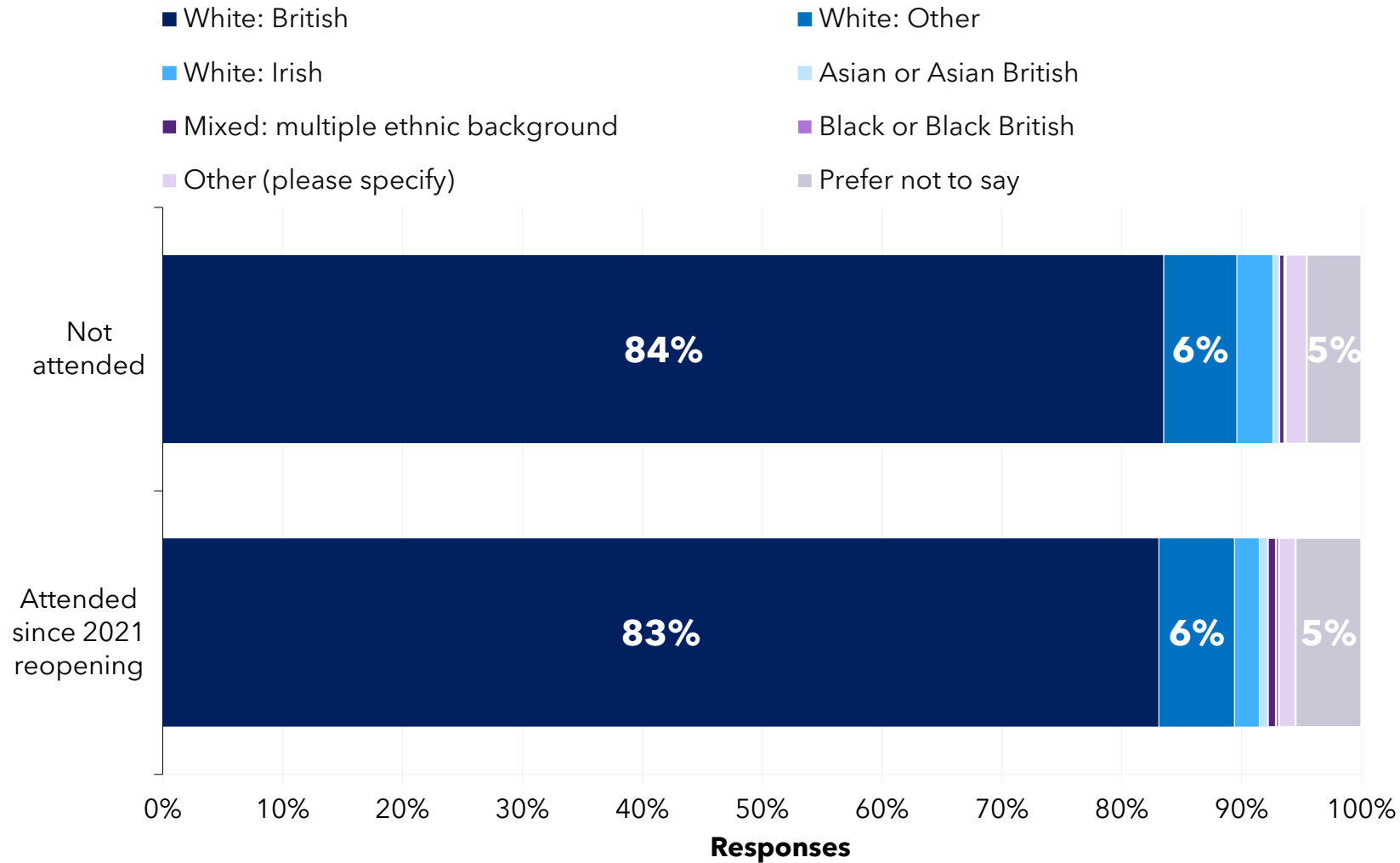


D/deaf or DISABLED

- Slightly more non-returned identify as D/deaf or disabled

Wave 1 n = 10,834

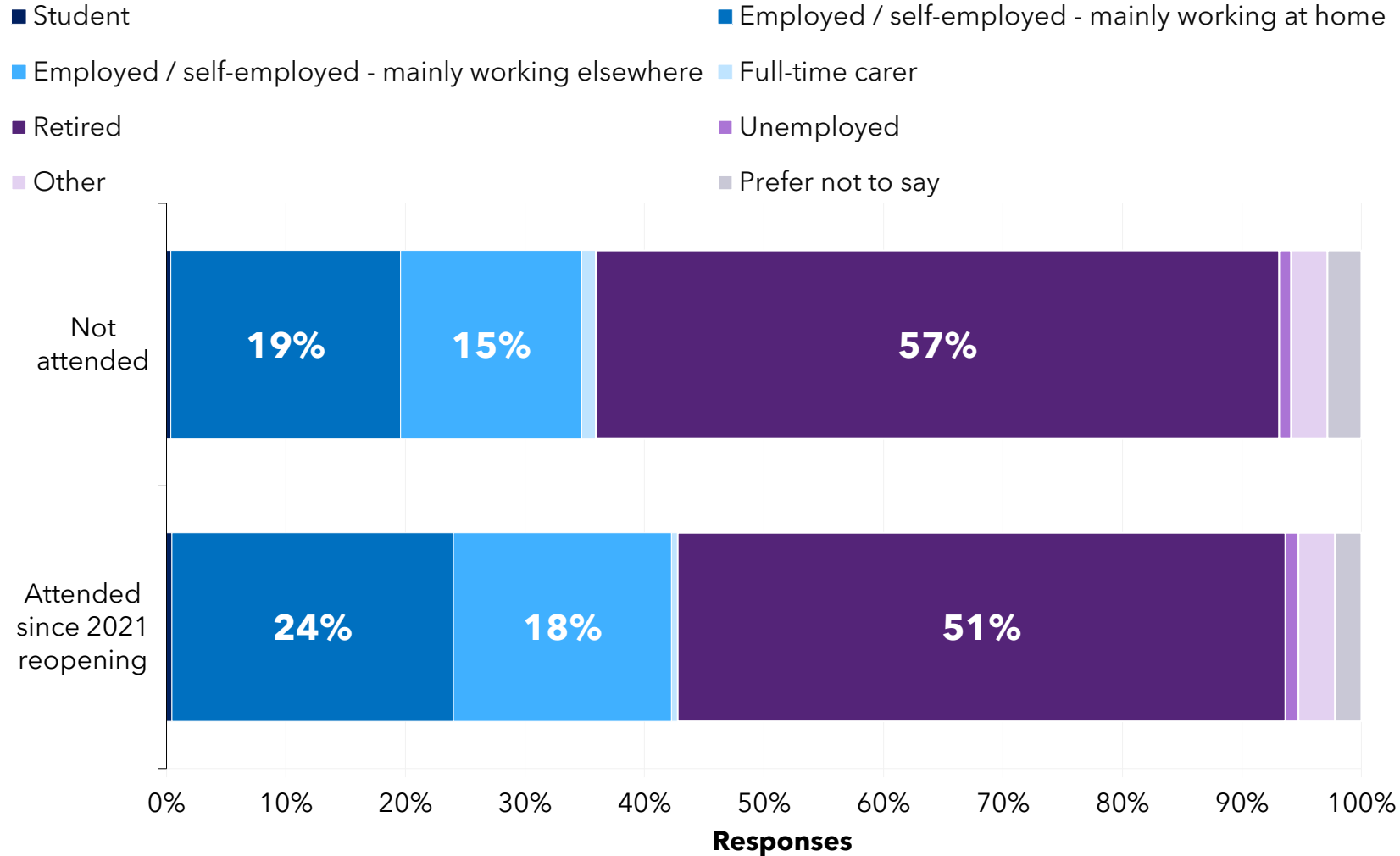
Respondents by ethnicity



ETHNICITY

Wave 1 n = 10,834

Respondents by employment



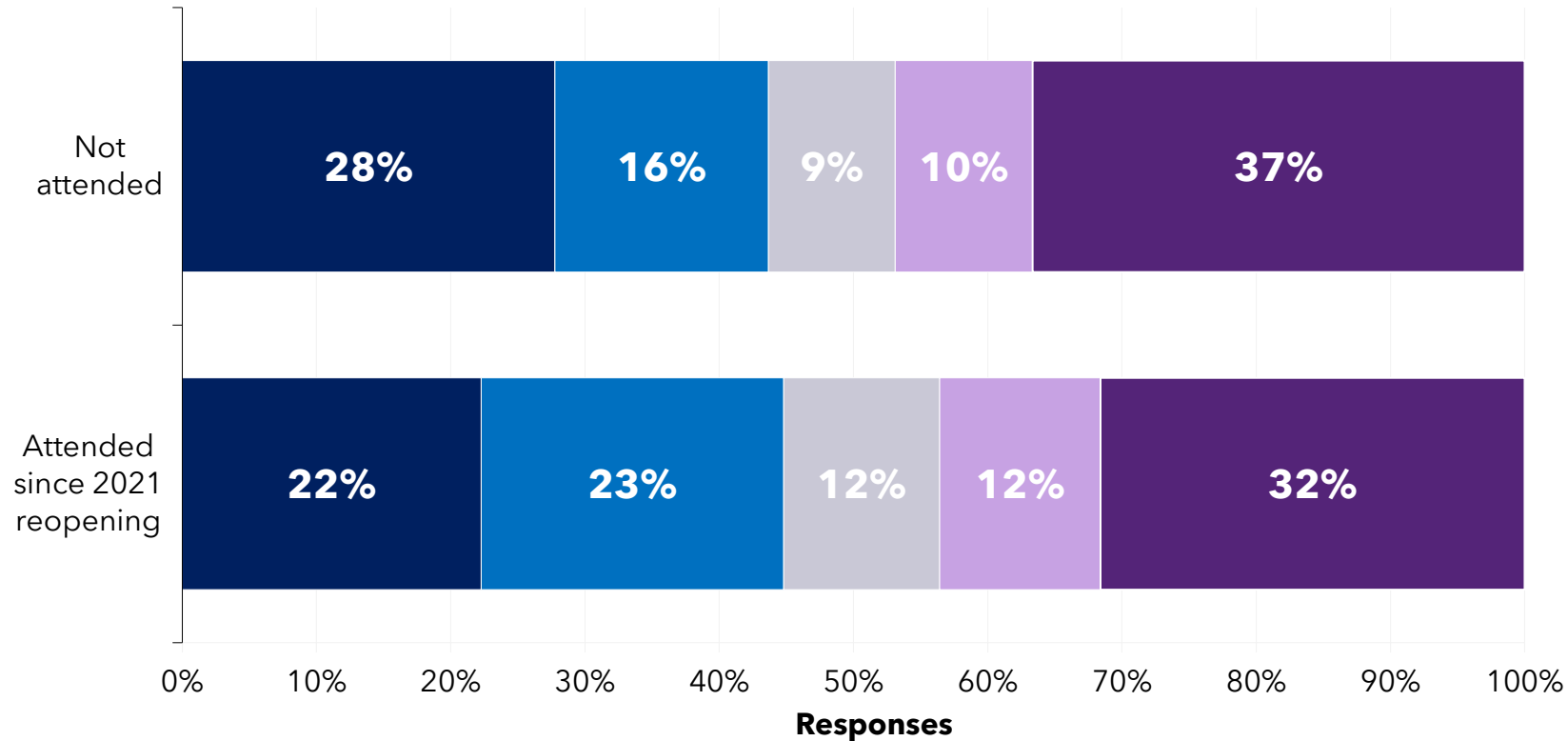
EMPLOYMENT

- Slightly more retired respondents among non-returners

Wave 1 n = 10,834

Respondents by employment

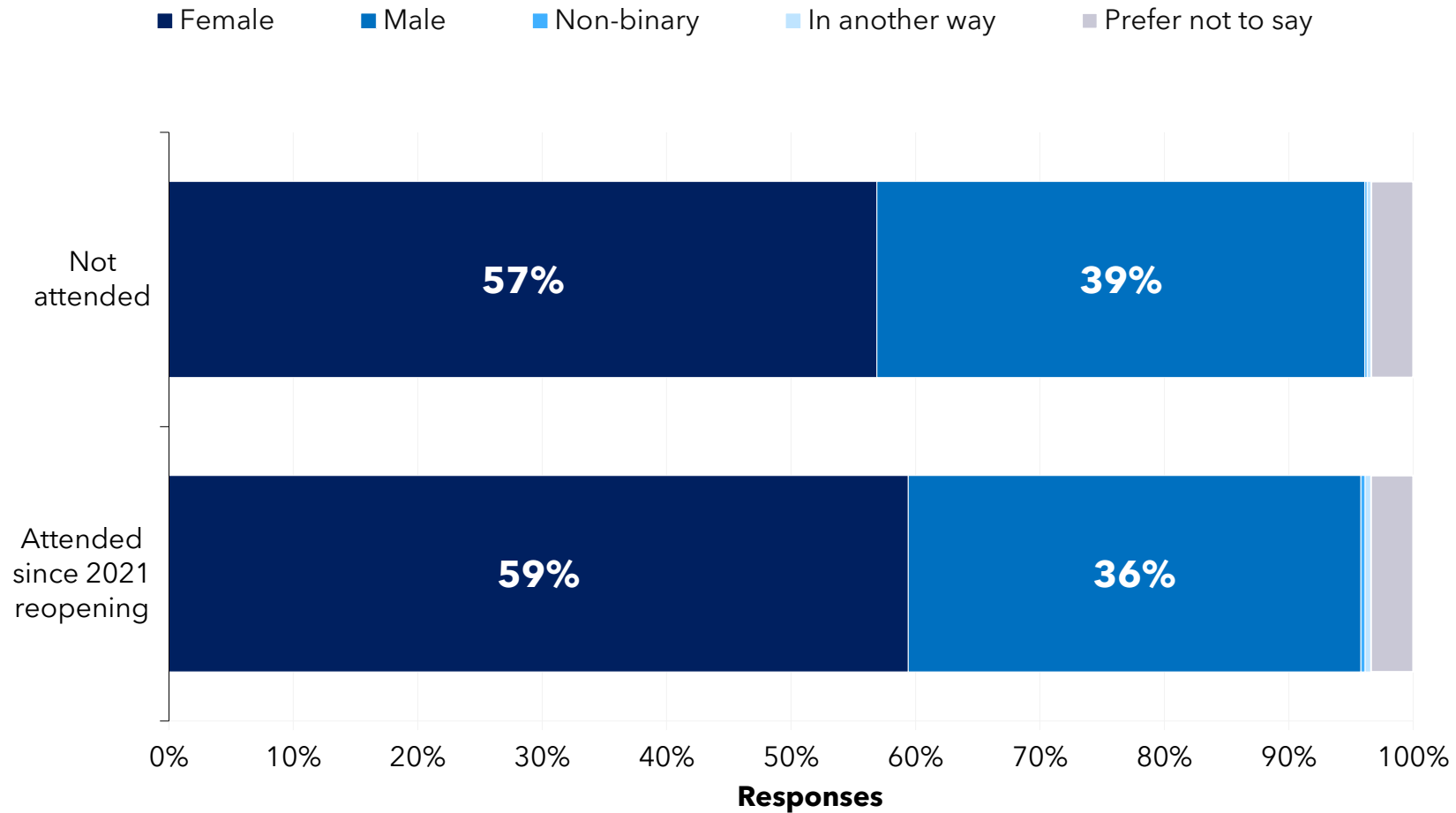
- Fully from home
- Mostly from home
- About half and half
- Mostly in an office / other workplace
- Fully in an office / other workplace



EMPLOYMENT

Wave 1 n = 1,793

Respondents by gender



Wave 1 n = 10,834

Are you
signed up for
Wave 2?

A LARGER DATA SET ENABLES:

- EVER-MORE NATIONALLY REPRESENTATIVE
- GRANULAR SEGMENTATION

EVERY ORGANISATION HAS ACCESS TO ITS OWN LIVE RESPONSES

JOIN TODAY:

indigo-ltd.com/missing