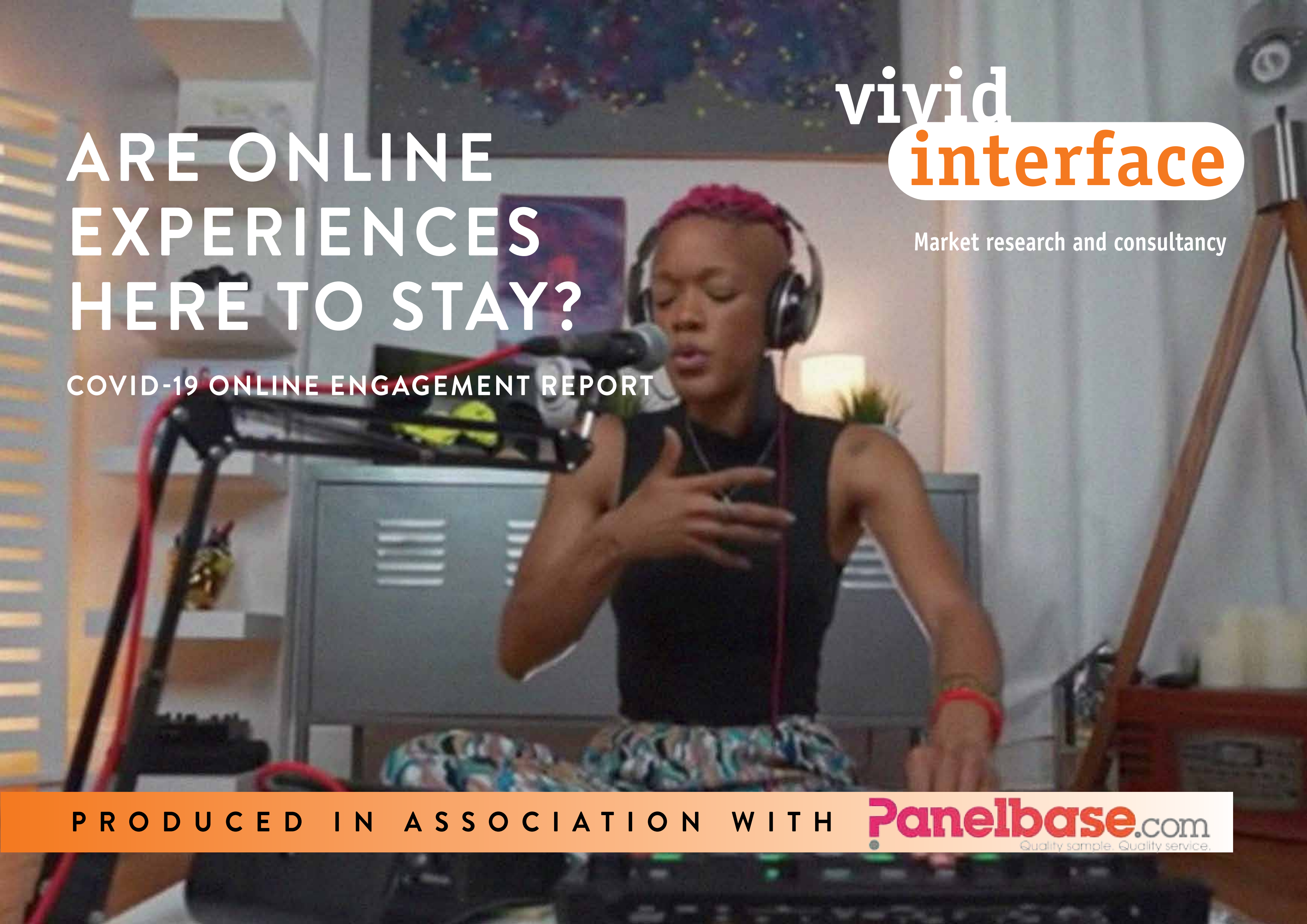


ARE ONLINE EXPERIENCES HERE TO STAY?

vivid interface

Market research and consultancy

COVID-19 ONLINE ENGAGEMENT REPORT

PRODUCED IN ASSOCIATION WITH Panelbase.com

Quality sample. Quality service.

COVID-19 ONLINE ENGAGEMENT REPORT

This is the third in a series of COVID-19 reports from Vivid Interface, looking at the visitor attraction sector both in terms of consumer sentiment and organisational resilience.

Our second Consumer Sentiment Report focused on what previous visitors to attractions, cultural organisations and the arts expected to do over the coming months and when, or if, they are likely to return.

The study revealed an extraordinary growth in online consumption in terms of cultural experiences, media viewing and health and wellbeing. This is not surprising given a newly released Ofcom report showed that on average people were spending 25% of their day online during lockdown.

The report examines the growth in online experiences and internet use during lockdown and how big shifts in behavior are likely to stay with us and keep evolving.

In this report we ask:

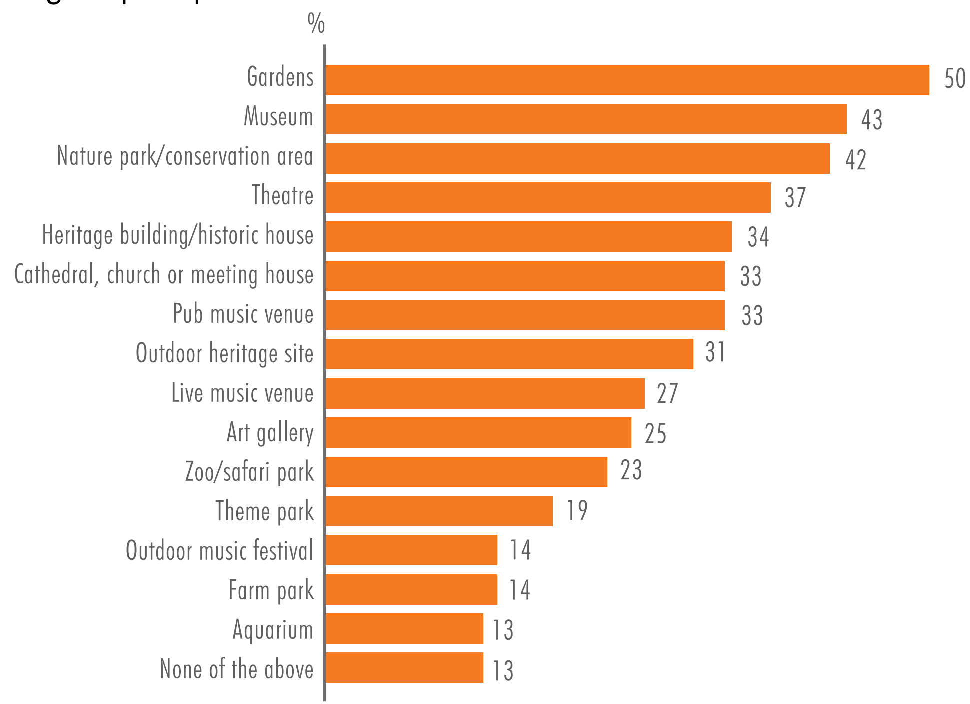
- What content and experiences have people been engaging with online during lockdown?
- What will they continue to engage with once lockdown is lifted?
- Will people be prepared to pay for these online experiences?

The research was conducted over June 6/7th 2020, and therefore the mindset of consumers was very much still in lockdown but with gardens and outdoor experiences starting to open up.

THE SAMPLE

Our sample of 1019 respondents are active paying visitors who had visited at least one of the following attractions in the previous 18 months. They represent around 53% of the UK population. Therefore as an easy rule of thumb we can say that the percentages in the charts apply to half of the 18 + population across the UK - approximately 26.5 million people.

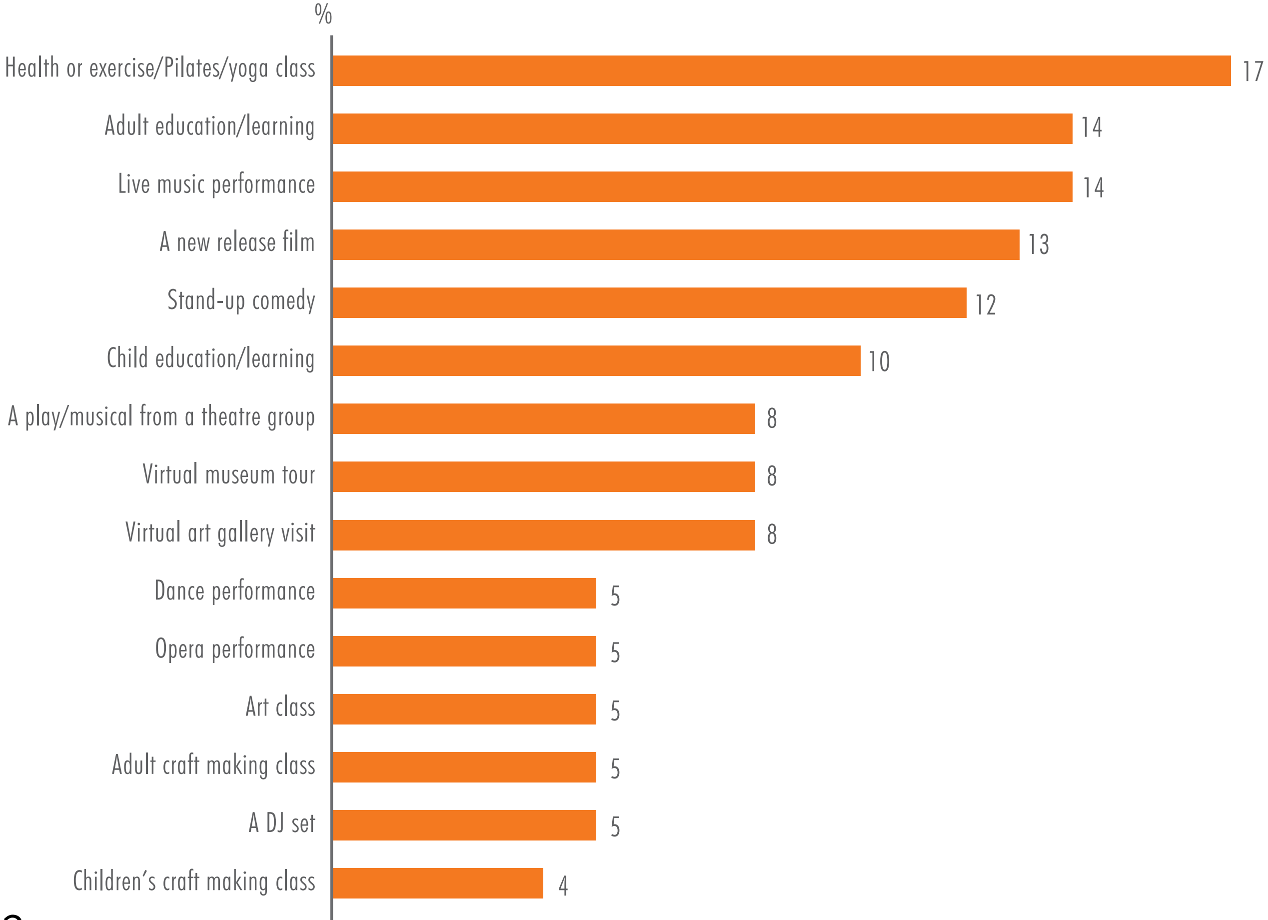
Which of these have you visited in the last 18 months?



WHAT PEOPLE HAVE BEEN WATCHING OR PARTICIPATING IN DURING LOCKDOWN

Firstly, we look at what our sample of active visitors have been watching or participating in during lockdown. We asked:

Which of these have you watched or participated in online before and during lockdown?



Turning percentages into people

We can look at the example of a virtual museum tour to translate the percentages in the chart to real people. We have 8% of the 26.5 million active people who say they have participated in a virtual museum tour online during lockdown. This equates to 2.1 million people in the general population.

Demographic Variations - watching or participating in during lockdown

Age Variations

55+ are less likely to watch health or exercise classes than 18-25 (13% vs 26%).

18-25 age group were much more likely to watch Adult education/learning (30%).

Gender Variations

Women were more likely to watch Health or exercise/pilates/yoga class than men (26% vs 10%).

Life stage Variations

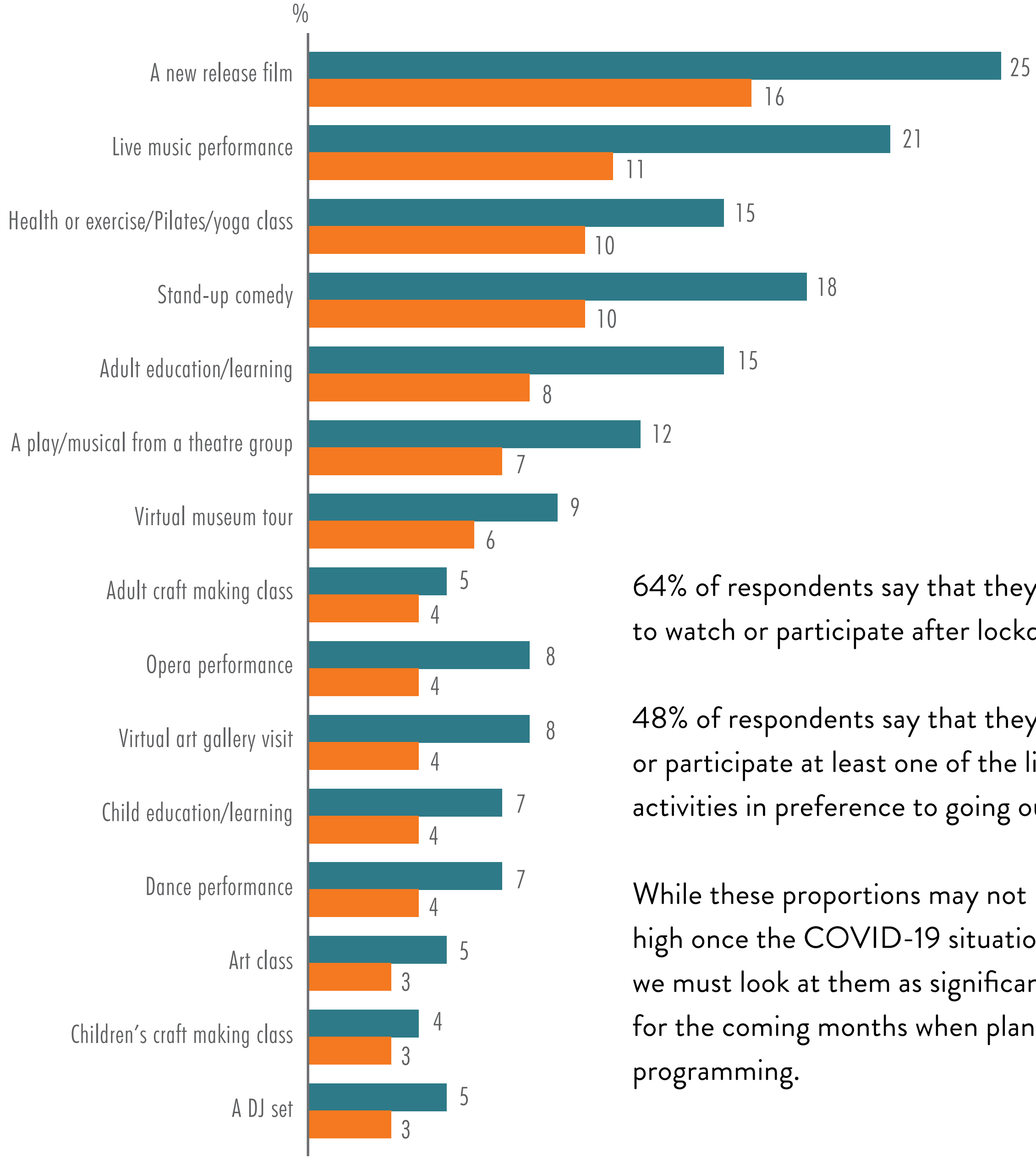
Those with children under 16 were more likely to watch Children education/learning (35%).

EXPECTED ONLINE BEHAVIOUR AFTER REOPENING

If we look at the chart to the right, we can compare those who would continue to watch or participate in an online experience after lockdown and those who would prefer to do so in preference to going out.

Which of these would you expect to WATCH or PARTICIPATE in online even after venues and attractions have reopened?

Which of these do you expect to do online IN PREFERENCE to going out to a venue/gallery/performance venue/learning space when they reopen after lockdown?



64% of respondents say that they will continue to watch or participate after lockdown lifted.

48% of respondents say that they will watch or participate at least one of the listed online activities in preference to going out for them.

While these proportions may not remain as high once the COVID-19 situation eases, we must look at them as significant now and for the coming months when planning and programming.

For 'A play from a theatre group' we can see 12% say they will continue to watch online and 7% to continue to watch online in preference to going out, equating to a minimum 3.3 million and 1.8m people respectively.

We can see that watching a live music performance is popular with 21% of our active respondents stating that they expect to continue to watch online, and 11% saying this in preference to visiting a live music venue. This equates to a minimum estimate of 5.6m people wanting to watch live music performances at home, and a minimum estimate of 2.9 million in preference to going out to venues. We can add to this people in the community who do not currently go out to live music performances but who may want to watch them online.

Clearly this may change over time but streaming live music performances looks like it may be a significant opportunity for some.

We can look at variations by age, gender and life stage for what respondents wanted to watch online after lockdown. There were no significant variations for what respondents wanted to watch online *in preference* to going out.

Demographic Variations - Continue to watch or participate in online experiences after lockdown

Age variations:

55+ were less likely to engage online at all than other age groups and they are less likely to continue to watch or participate than all other age groups for all online activities listed. However, there are five activities they will watch or participate in significantly more than average:

Live music performance	12%
A new release film	9%
A play or musical	8%
Adult education/learning	8%
Health or exercise	8%

26 to 35 age group are more likely than other age groups to expect to continue to watch or participate in:

Stand-up comedy	28%
Children's craft making	10%
Art Class	10%

Gender variations

There are significant gender differences. Men are more likely to continue to watch live music performances and standup comedy and women are more likely to watch or participate in health or exercise:

	Men	Women
Live music performance	19%	11%
Stand-up comedy	18%	13%
Health or exercise	10%	19%

Life stage variations

The main variations for life stages are amongst those from a family including children under 16 compared to independent adults. The chart shows what families with children under 16 are more likely to watch or participate in:

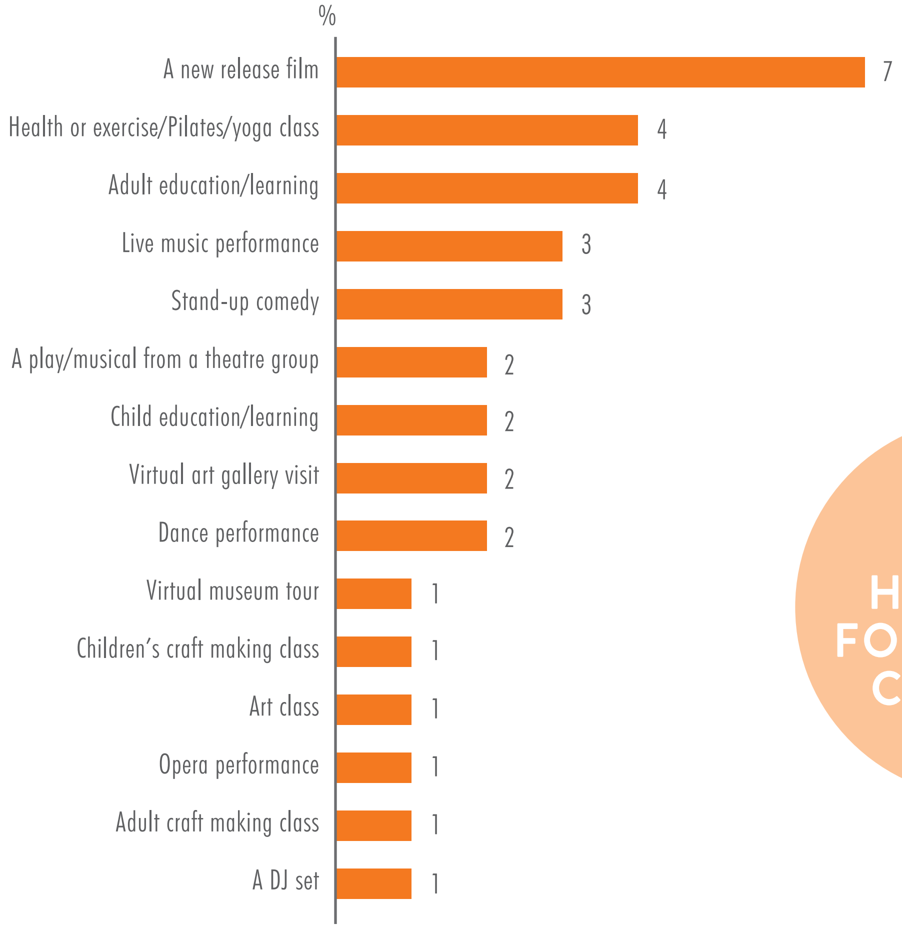
Child education and learning	23%
Children's craft making class	12%
Art class	10%
Dance performance	10%
DJ set	8%

WHAT HAVE PEOPLE *PAID* TO WATCH ONLINE DURING LOCKDOWN

21% of the respondents had paid for online content or experiences during lockdown. Using our model we can see that 4% of our sample said that they had paid for Adult education/learning and this equates to a minimum of 1.04m people in the UK paying to engage with adult education/learning, and 0.52m paying for a theatrical performance.

You could look at this chart in one of two ways. On the one hand these numbers might appear small, and in many ways they are. On the other hand it could be viewed as a significant emerging market in its early stages. Much depends on the offer and developing online experiences that can't easily be replicated in person. It is also important to remember that our survey spoke only with people who had been to visitor attractions or cultural venues in the previous 18 months before COVID-19.

Which of these have you PAID to VIEW/PARTICIPATE in during lockdown? Please tick all that apply



21%
HAD PAID FOR ONLINE CONTENT

Our next report in the Covid-19 Consumer Sentiment series looks at pricing scope and price elasticity for online engagement. To receive this report please email:
max@vivid-interface.com.

This survey was conducted by Vivid Interface in conjunction with Panelbase and using Snapsurveys Software.

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