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Making everyone's day brighter

CULTURE VULTURES

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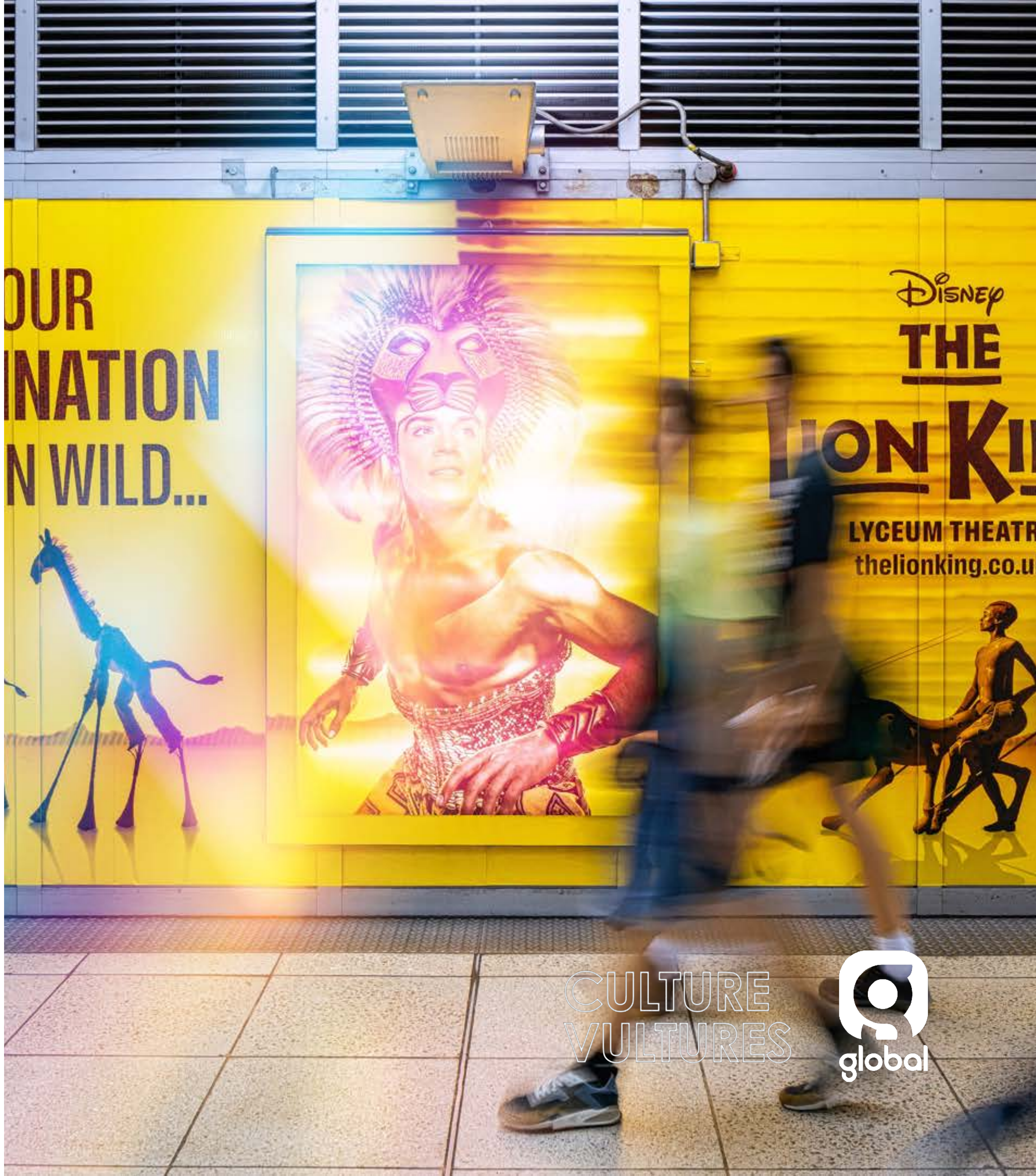

1. INTRODUCTION

INTRODUCTION

Putting industry insights centre stage with brand new outdoor and audio research on the arts sector.

This year's study delves into the intricate dynamics of the market, scrutinising its stability in the wake of escalating living costs.

This report offers a comprehensive overview of consumer behaviour within the arts sphere, shedding light on key considerations for brands and advertisers engaging with these audiences.

Discover what nuances matter and explore how Global can play a pivotal role in connecting with and captivating these discerning audiences.

2. METHODOLOGY

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METHODOLOGY

APPROACH 1	**Desk Research** Mintel reports utilised for market research Global's Audience Insider dashboard tool to gauge consumer behaviour trends
APPROACH 2	**Quantitative Research** Global's Culture Vulture 2024 Survey in mid-December 2023 Nationally representative sample of 1200 respondents Consistent with the previous Culture Vultures 2023 survey (sample and questionnaire)

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3. INDUSTRY OVERVIEW

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WHAT DID WE LEARN FROM PREVIOUS RESEARCH?

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The previous Culture Vultures' research highlighted the anticipated return of the arts and explored the extent to which the arts sector had recovered from the pandemic, considering the impact of the rising cost of living.

WHAT DID WE LEARN FROM LAST YEAR'S RESEARCH?

ARTS & ATTRACTIONS ARE A PRIORITY FOR CONSUMERS	Despite economic challenges, 41% of visitors still prioritised arts and attractions, with 24% visiting more frequently than before the pandemic.
SEIZE THE DAY	The data also emphasised that, post-pandemic, the arts were not only for enjoyment but were a fundamental part of our way of life. 71% of respondents in the UK considered doing what made them happy more important than ever, indicating a focus on prioritising joy and making up for lost time in their cultural experiences.
ACTING SMARTER AND RESEARCHING FOR LONGER	Visitors were then planning and saving more, with only 5% opting for spontaneous trips, reflecting a 68% decrease year-over-year.

WHAT'S CHANGED IN 2024?

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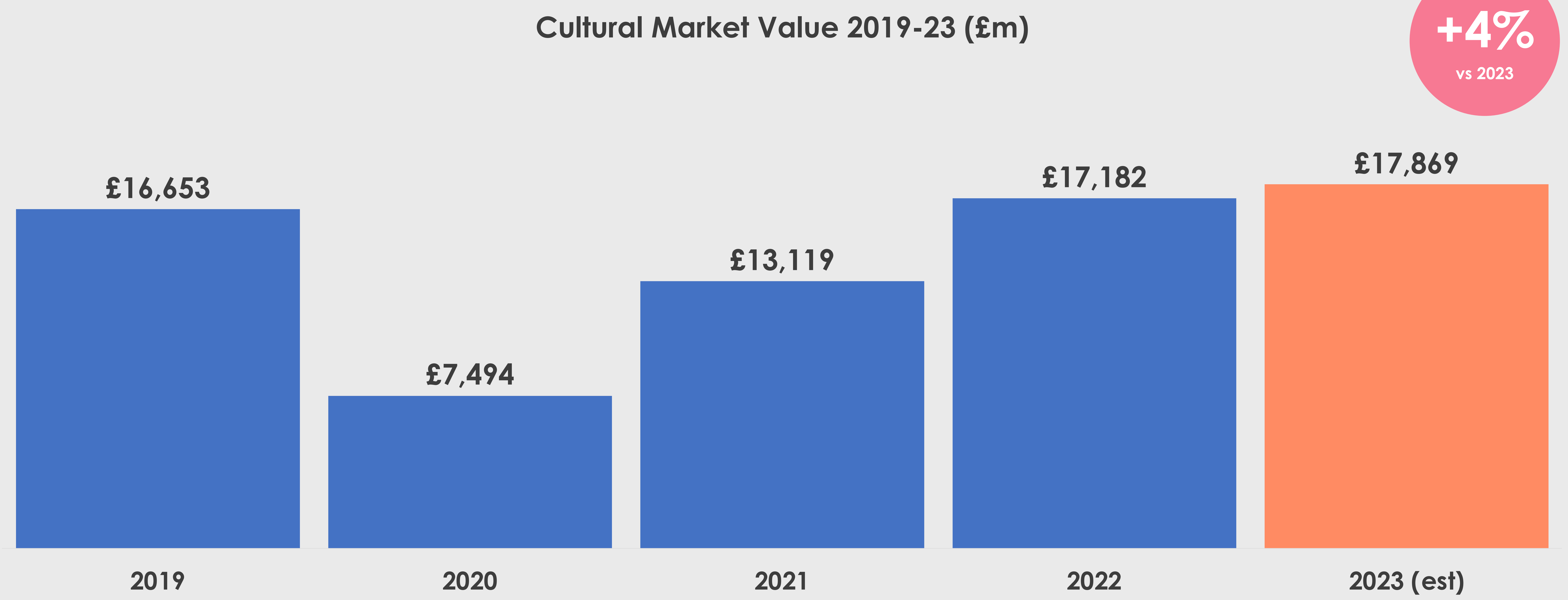
CONSUMER SPENDING IS EXPECTED TO HAVE RISEN BY 4%



Source: Mintel 2024

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-1%
vs 2023

90%

of the UK visited at least one venue in the last 12 months

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0%

vs 2023

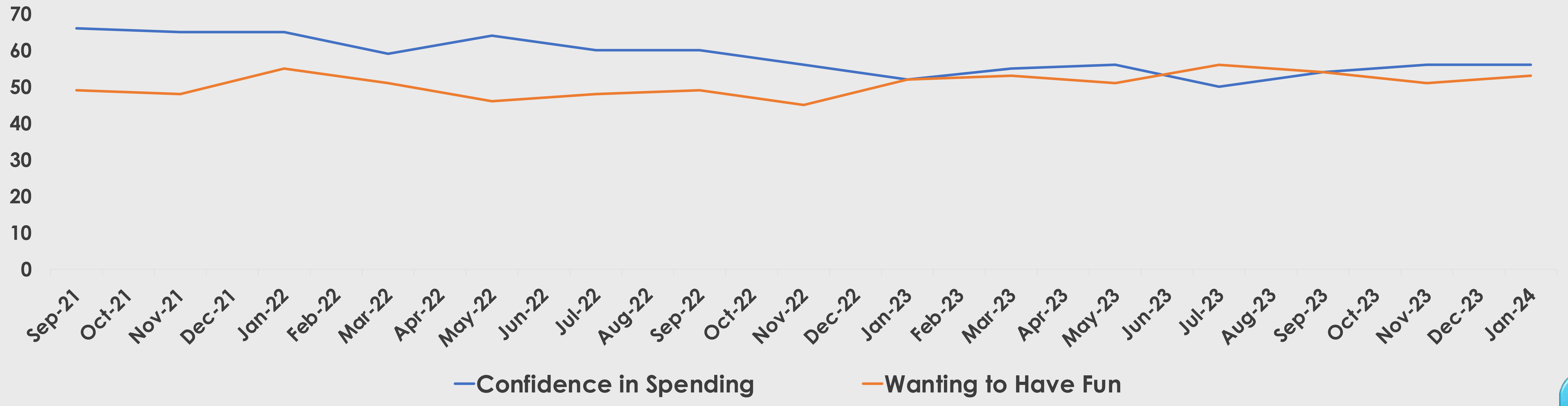
41%

consider arts & attractions to be a priority this year

Source: Culture Vultures 2024

THERE IS STABILITY IN POSITIVITY & SPENDING..

Confidence in spending has seen very little fluctuation, moving from 52% in January 2023 to 56% in 2024. The desire for fun has also remained stable, ranging from 51% to 56% over the same period.



Source: Audience Insider 2024

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Source: Culture Vultures 2024

-2%

vs 2023

7%

of people booked a visit less than a week before their visit took place

..BUT CONSUMERS ARE STILL TREADING CAREFULLY

People are still focused on finding cheaper prices, attending free events (29%), and comparing costs (40%), with 33% opting to stay local or travel less.

-1%
vs 2023

37%

spend more time looking at cheaper prices

-5%
vs 2023

29%

attending more free events

+1%
vs 2023

40%

comparing prices

+4%
vs 2023

33%

staying local or travelling less

Source: Culture Vultures 2024

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HOW HAVE THINGS CHANGED vs LAST YEAR?

ARTS & ATTRACTIONS ARE A PRIORITY FOR CONSUMERS	Art and attraction continue to play a pivotal role in the lives of individuals, as evidenced by a staggering 90% of UK residents having visited at least once in the past year. Impressively, 41% of people consider arts and attractions a top priority. These statistics hold steady when compared to the previous year, indicating a consistent trend in attitudes and behaviours based on the findings from the preceding years.
SEIZE THE DAY	The enduring prioritisation of arts and attractions, coupled with a sustained and pervasive trend of individuals across the UK actively seeking enjoyment, signifies that the 'seize the day' mentality observed in last year's research remains steadfast.
ACTING SMARTER AND RESEARCHING FOR LONGER	A noteworthy 7% of individuals scheduled their visits within a week of the actual event, revealing a consistent pattern of decreased spontaneity in booking. This trend underscores a preference for planning experiences well in advance, allowing individuals to save time and optimize their schedules more effectively. In-depth research also indicates that consumers continue to prioritise budget considerations, with a substantial 29% seeking free events and 40% actively comparing costs.

4. VENUES & ATTRACTIONS

THEATRE VENUES

Understanding audiences who visited theatre venues in the UK last year.

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OVERVIEW

63% Visit theatres each year
same % as previous 2023 survey

62% Visit theatres to attend a musical

35% Attend at least once every 2 months
2% decrease from previous 2023 survey

Source: Culture Vultures 2024

KEY DEMOGRAPHICS

58%

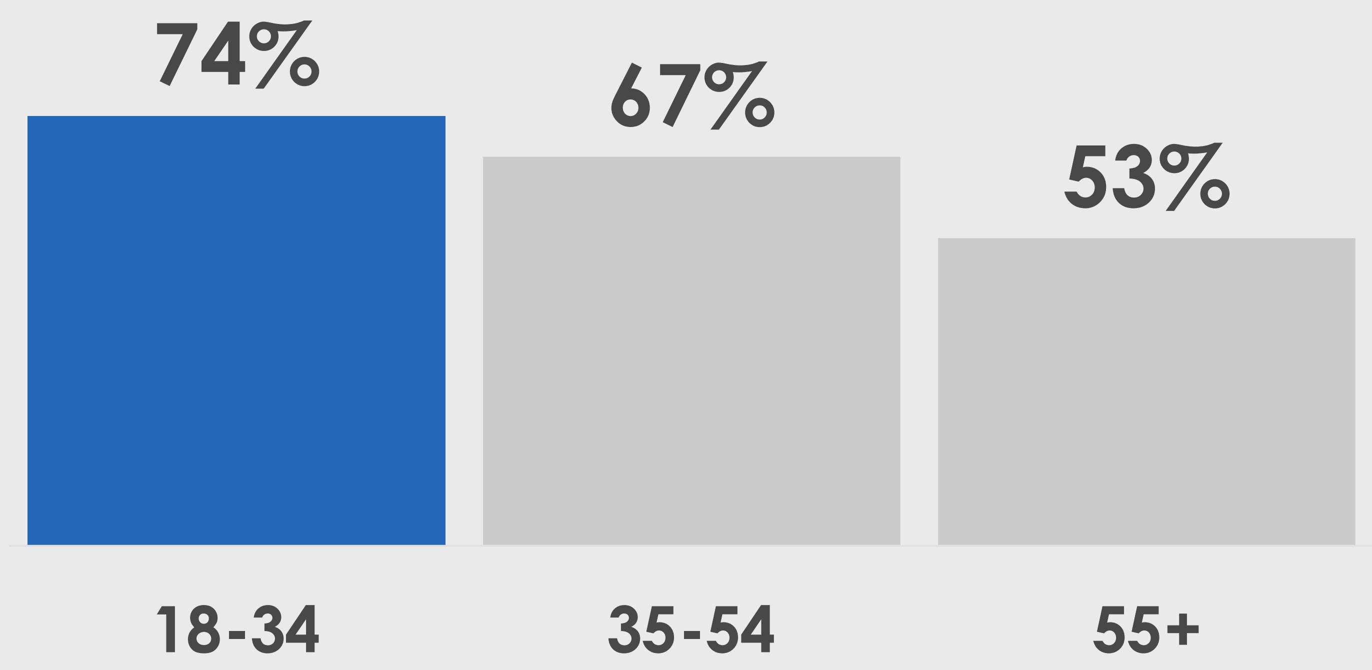
of males visited a theatre venue

67%

of females visited a theatre venue

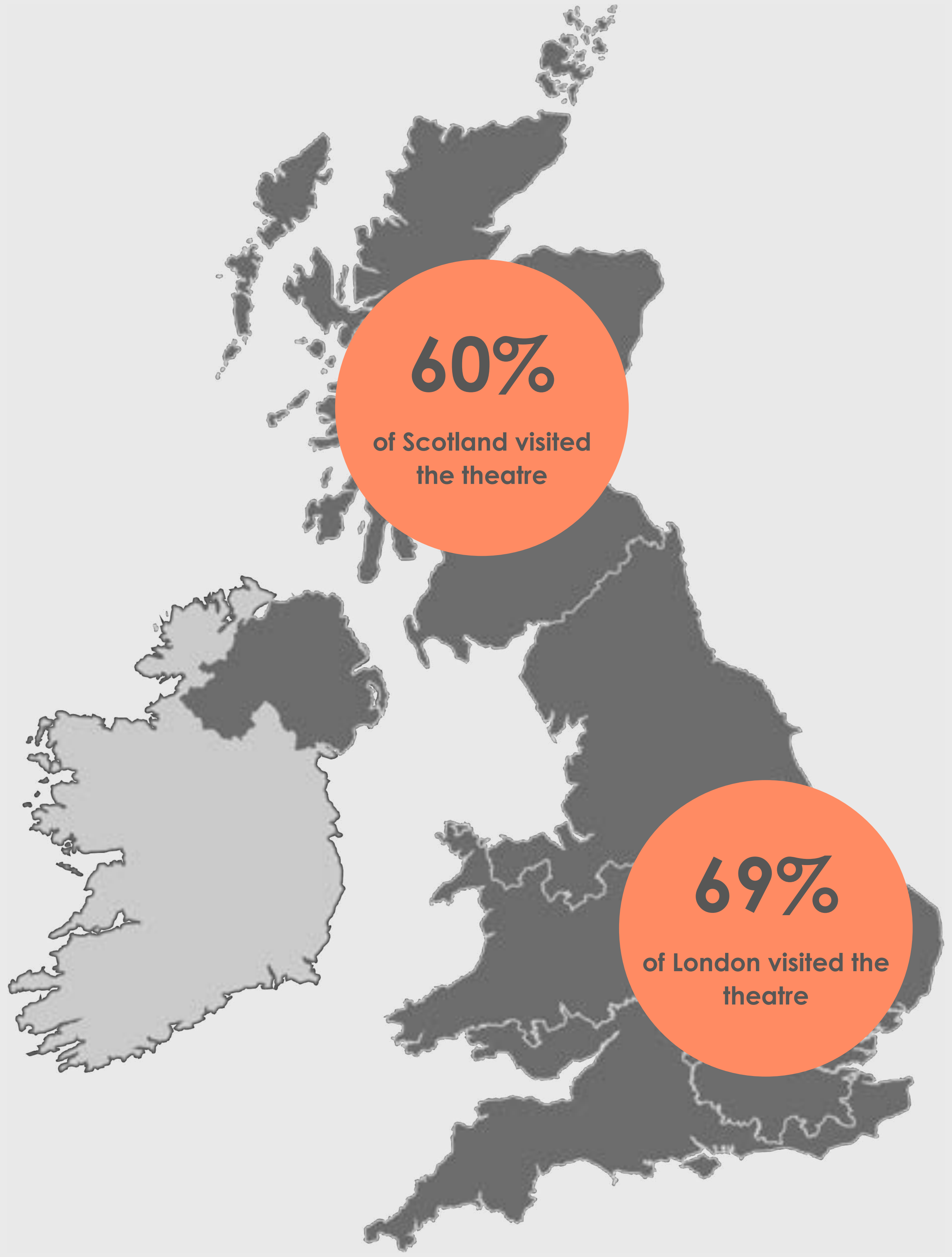
69%

of ABC1s visited a theatre venue



49%

visited a theatre venue with their partner



Source: Culture Vultures 2024

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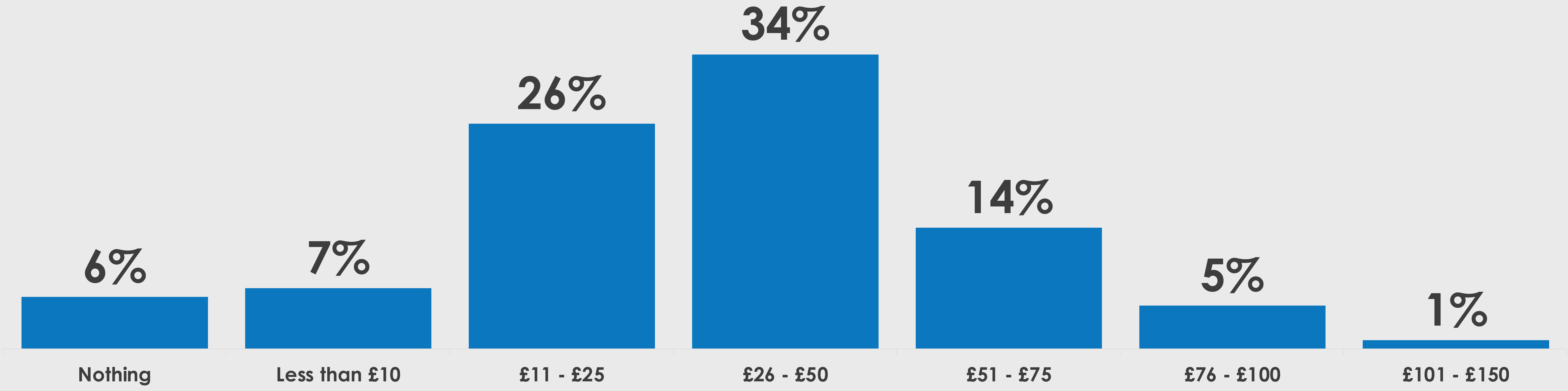
COST EXPECTATIONS

There is a range of price expectations range when attending theatre venues from **6%** of theatre goers expecting to pay nothing, to majority expecting mid-range prices



Source: Culture Vultures 2024

Source: Culture Vultures 2024

THEATRE TOKENS

24% of people are familiar with theatre token

71% of people who know about theatre tokens, have used them to purchase tickets

45% of people who know about theatre tokens, having purchased them as a gift for someone else

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WHY GLOBAL?

Audio

78%
of Capital XTRA listeners attended a theatre last year

87%
of Radio X listeners attended a theatre last year

Outdoor

90%
of LU users attended a theatre last year

67%
of road users attended a theatre last year

Source: Culture Vultures 2024

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MUSEUM VENUES

Understanding audiences who visited museum venues in the UK last year.

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OVERVIEW

70% Visit museums each year

1% increase vs. 2023 survey

81% of people with kids visit museums a least once a year

37% Attend at least once every 2 months

4% increase vs. 2023 survey

Source: Culture Vultures 2024

KEY DEMOGRAPHICS

68%

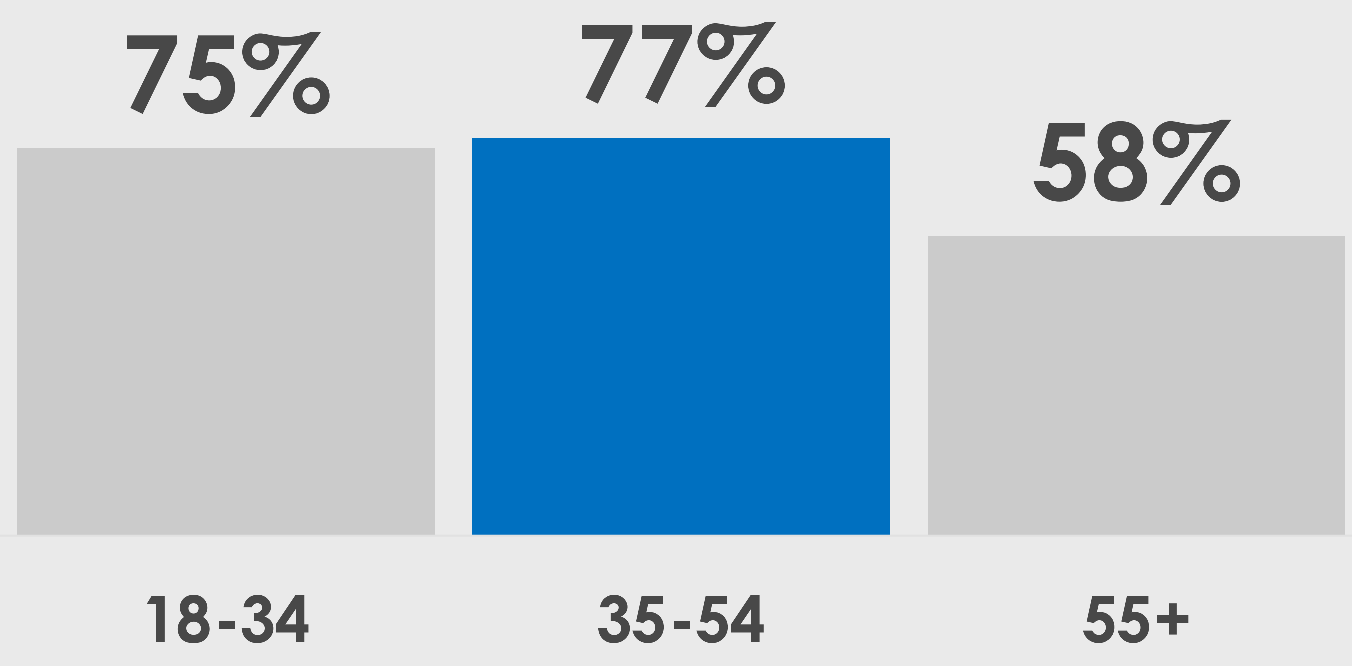
of males visited a musuem

69%

of females visited a museum

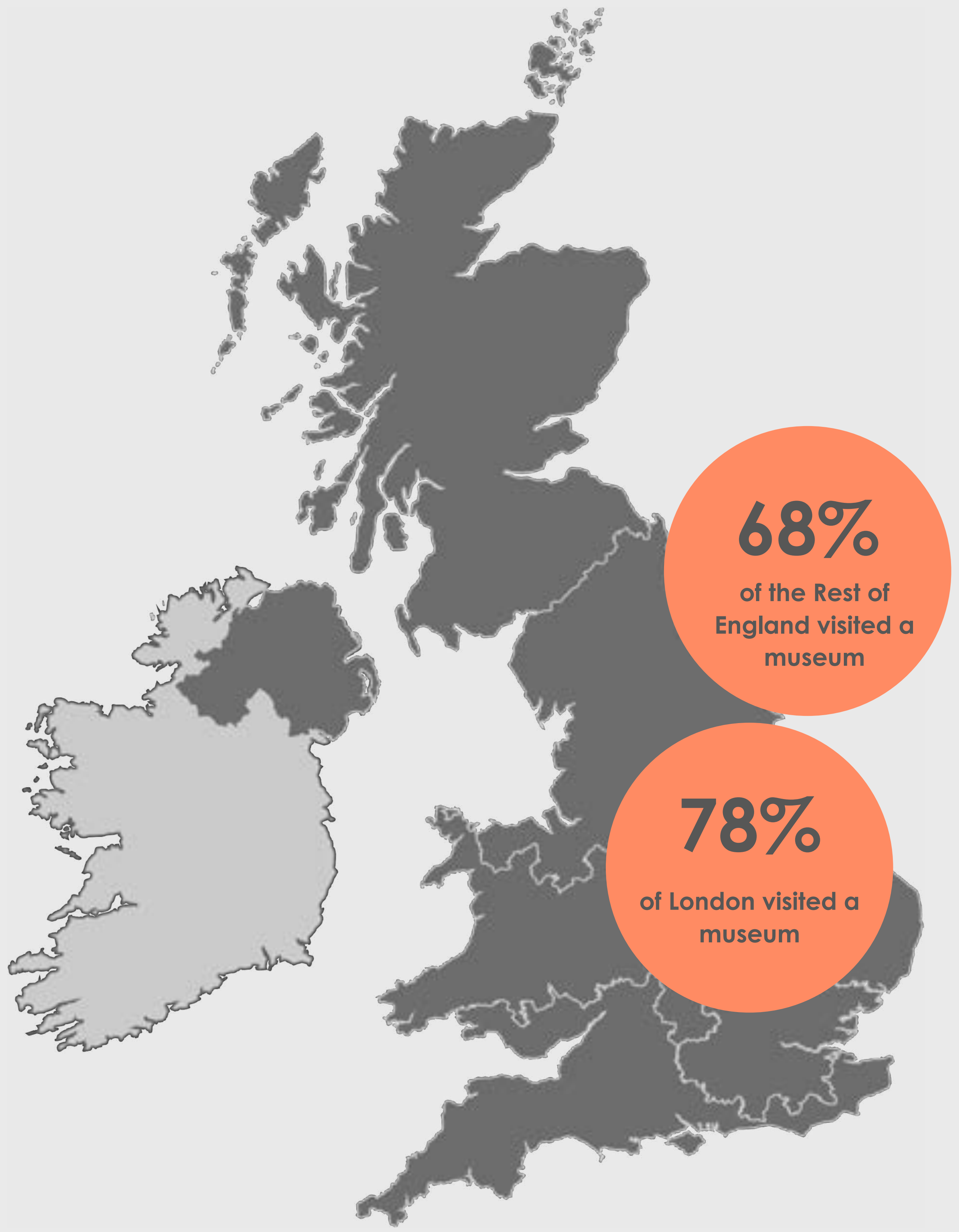
79%

of ABC1s visited a museum



44%

visited a museum with their partner



Source: Culture Vultures 2024

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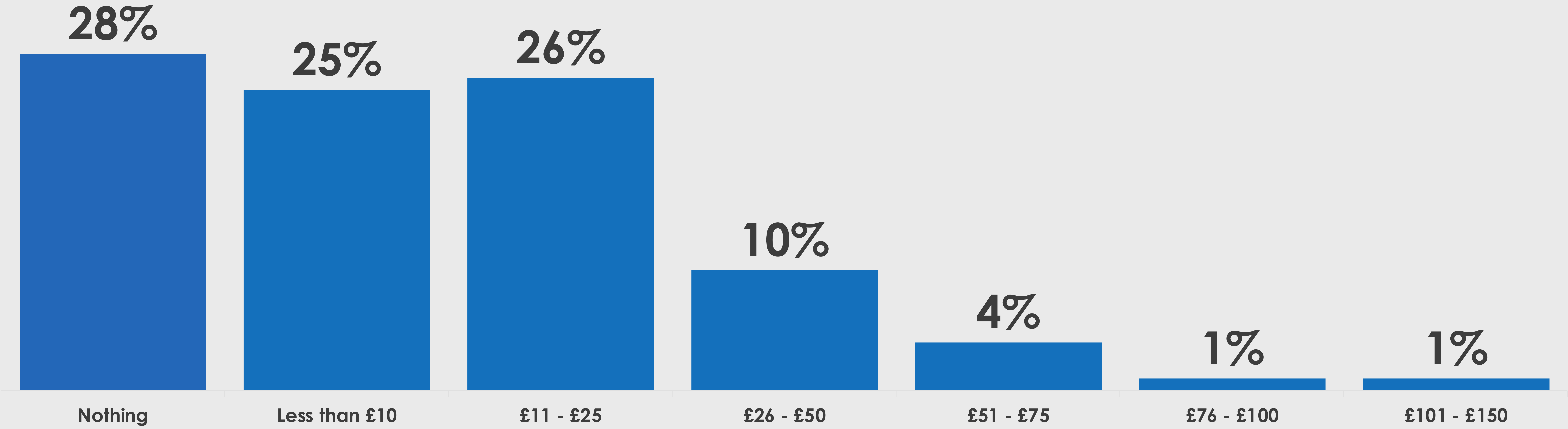
COST EXPECTATIONS

75% of museum visitors expect to spend less than **£25**, with a notable **28%** expecting free entry.



Source: Culture Vultures 2024

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KEY STATEMENTS

"A museum's connection to social or political causes influences my decision to visit"

49% Agree

"A museum collaborating with artists, performers, and other cultural partners makes me more likely to go"

59% Agree

"The way a museum uses social media and engages online affects my choice to attend"

46% Agree

"A museum actively discussing cultural topics or issues is something I think about when deciding to visit"

59% Agree

"The appearance of a museum is a consideration for me when deciding to visit (e.g the decor)"

61% Agree

"A loyalty programme, offering rewards for frequent visits, would influence my choice to visit"

51% Agree

Source: Culture Vultures 2024

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WHY GLOBAL?

Audio

LBC

85%

of LBC listeners attended a museum last year

RADIO X

93%

of Radio X listeners attended a museum last year

Outdoor

92%

of LU users attended a museum last year

72%

of road users attended a museum last year

Source: Culture Vultures 2024

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ART GALLERIES

Understanding audiences who visited art galleries in the UK last year.

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OVERVIEW

56% Visit art galleries each year

5% increase vs. 2023 survey

41% Visited The National Art Gallery

37% Attend at least once every 2 months

6% increase vs. 2023 survey

Source: Culture Vultures 2024

KEY DEMOGRAPHICS

54%

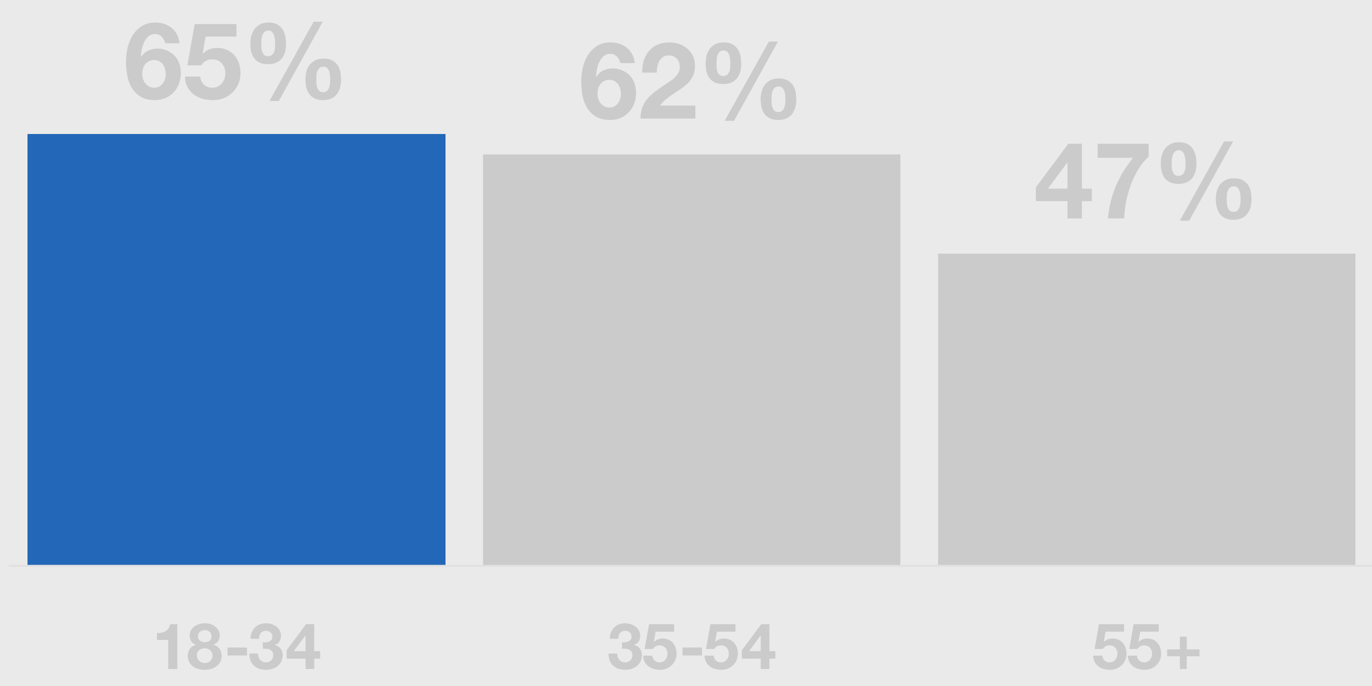
of males visited an art gallery

58%

of females visited an art gallery

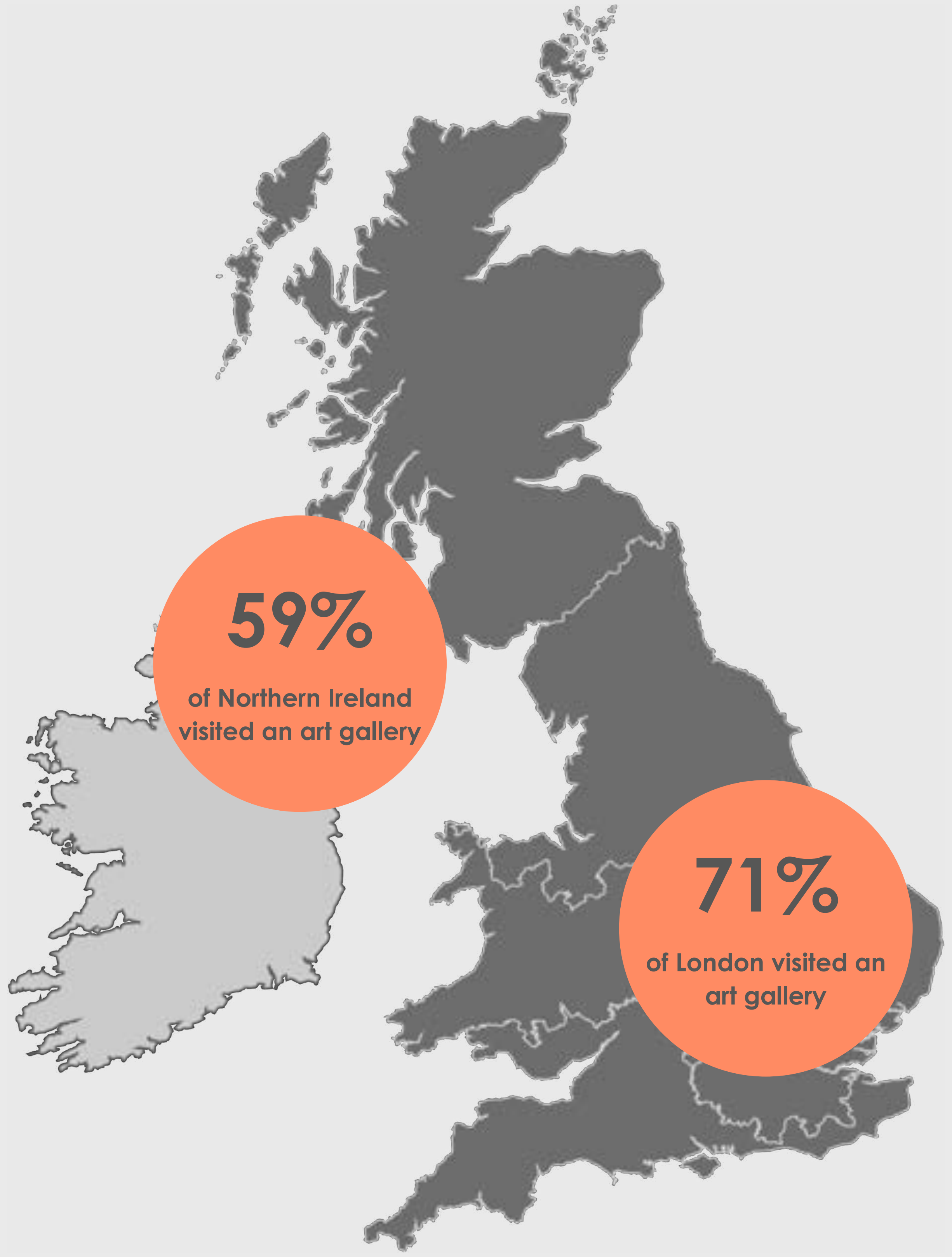
65%

of ABC1s visited an art gallery



40%

visited an art gallery with their partner



Source: Culture Vultures 2024

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COST EXPECTATIONS

A significant number of visitors don't expect to for gallery trips, and only 36% expect to pay more than £10.

Source: Culture Vultures 2024

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WHY GLOBAL?

Audio

79%
of Capital XTRA listeners attended an art gallery last year

82%
of Radio X listeners attended an art gallery last year

Outdoor

87%
of LU users attended an art gallery last year

58%
of road users attended an art gallery last year

Source: Culture Vultures 2024

ATTRACTIONS

Understanding audiences who visited attractions in the UK last year.

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OVERVIEW

63% Visit attractions each year

3% increase vs. 2023 survey

77% of people with kids visit an attraction each year

35% Attend at least once every 2 months

4% increase vs. 2023 survey

Source: Culture Vultures 2024

KEY DEMOGRAPHICS

61%

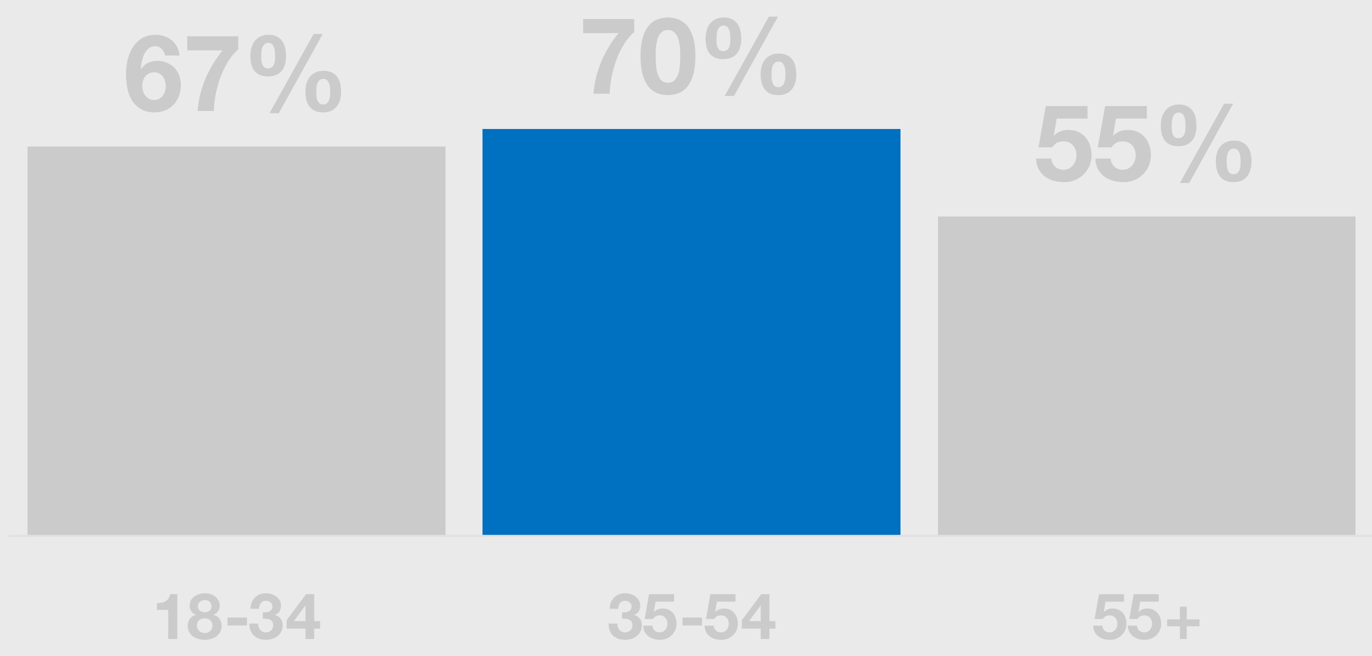
of males visited an attraction

65%

of females visited an attraction

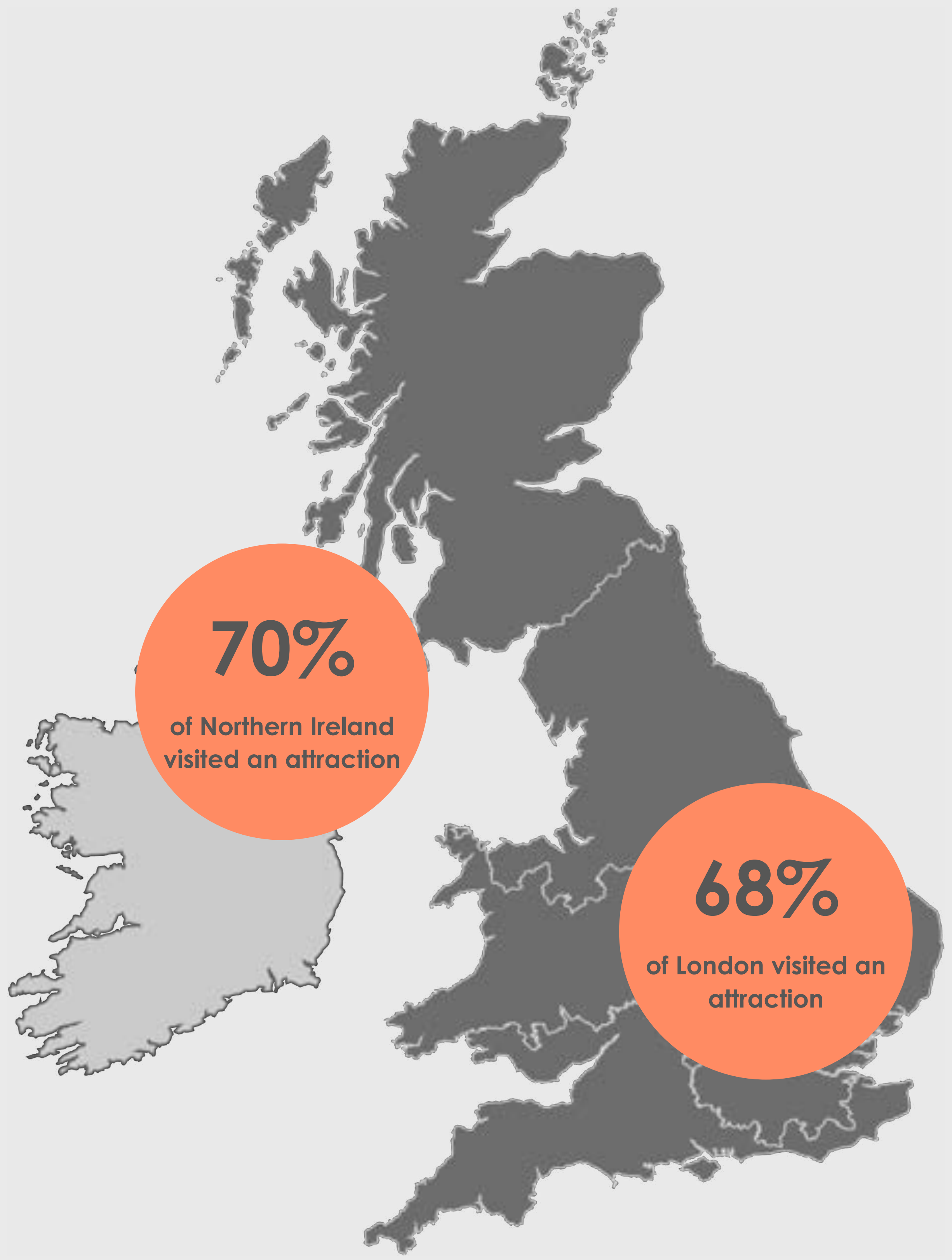
74%

of ABC1s visited an attraction



43%

visited an attraction with their partner



Source: Culture Vultures 2024

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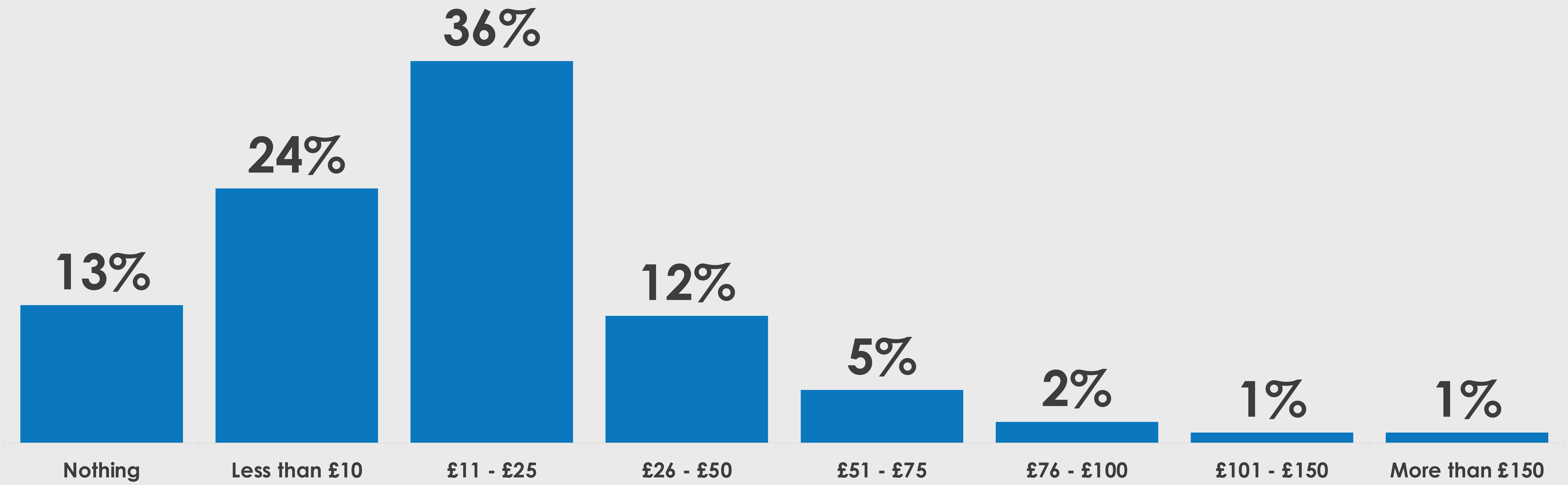
COST EXPECTATIONS

Most attraction visitors expect mid-range prices, but **13%** expect free entry.



Source: Culture Vultures 2024

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WHY GLOBAL?

Audio

82%

of LBC listeners attended an attraction last year

88%

of Radio X listeners attended an attraction last year

Outdoor

86%

of LU users attended an attraction last year

67%

of road users attended an attraction last year

Source: Culture Vultures 2024

IMMERSIVE EXPERIENCES

Understanding audiences who visited an immersive experience in the UK last year.

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OVERVIEW

37% Visit an immersive experience each year

4% increase vs. 2023 survey

59% of people with kids visit an immersive experience each year

19% Attend at least once every 2 months

6% increase vs. 2023 survey

Source: Culture Vultures 2024

KEY DEMOGRAPHICS

37%

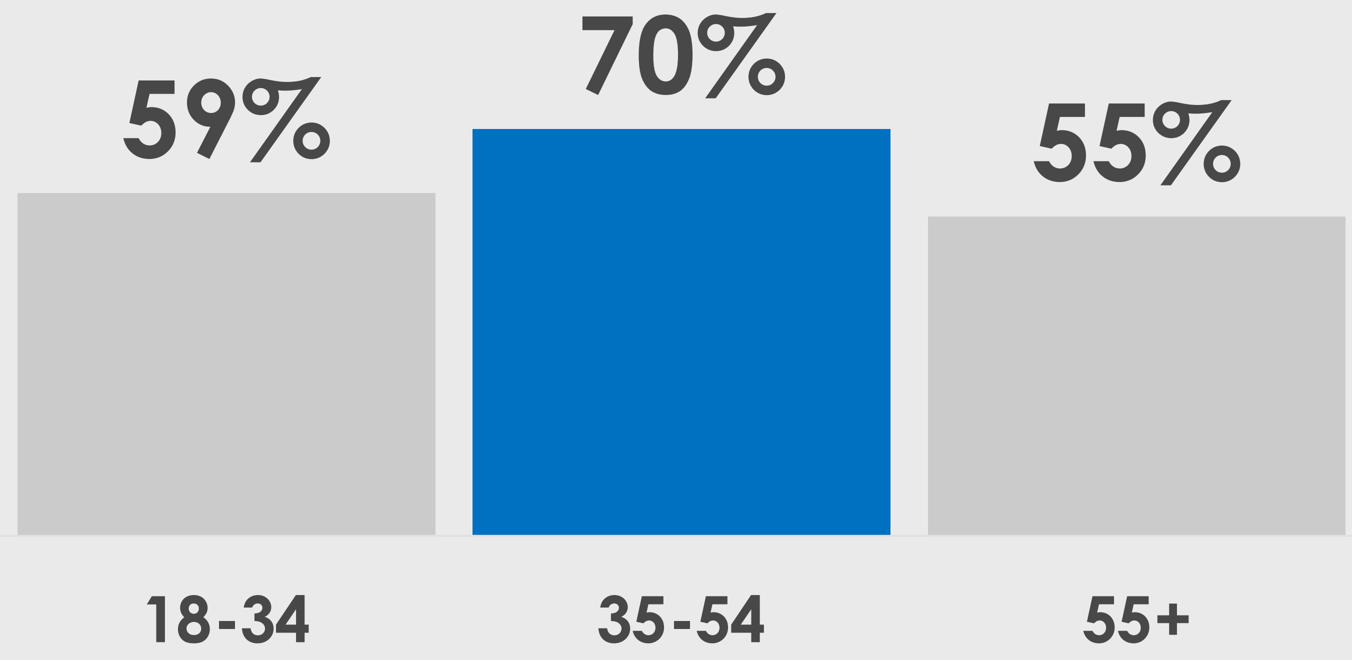
of males visited an immersive experience

39%

of females visited an immersive experience

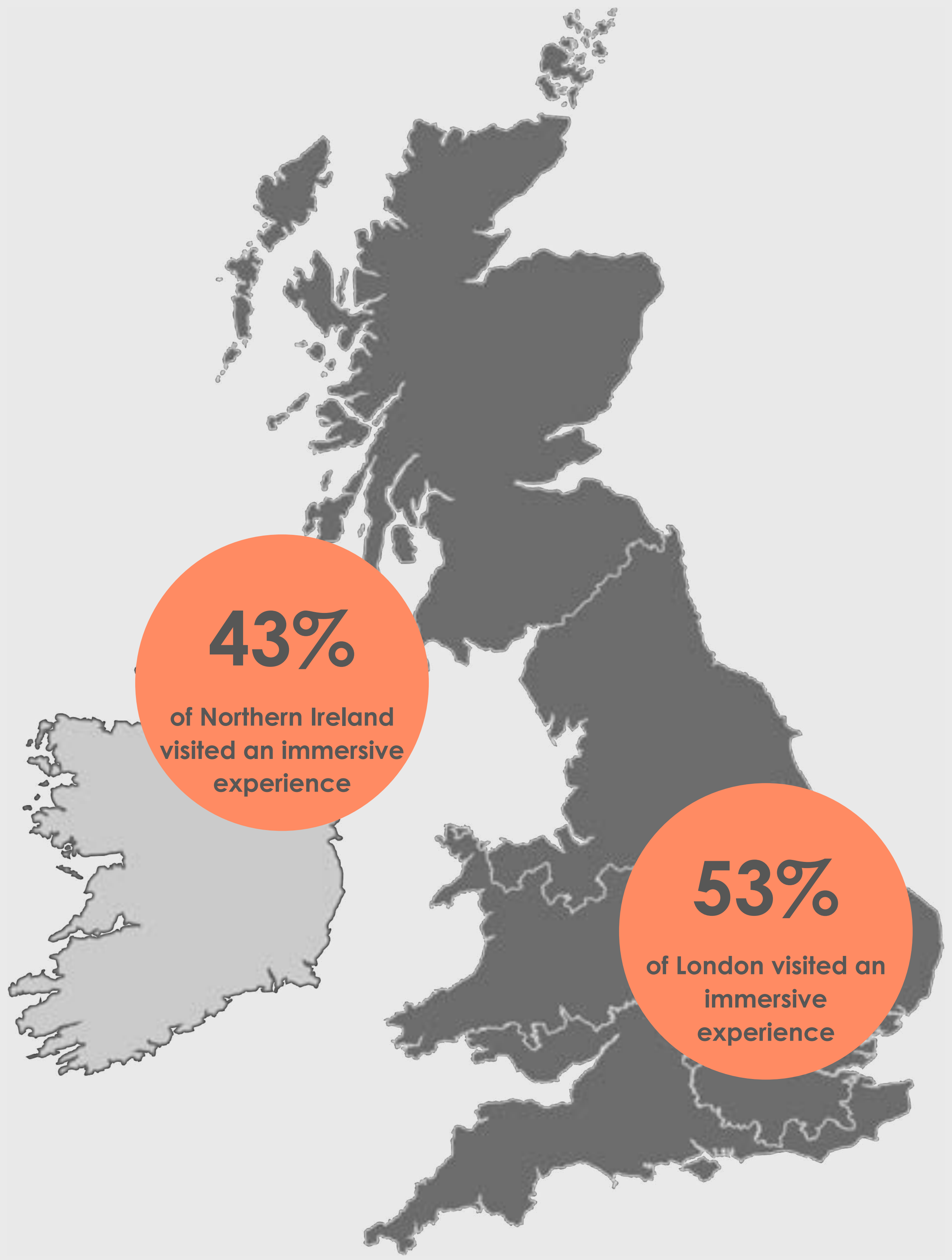
47%

of ABC1s visited an immersive experience



25%

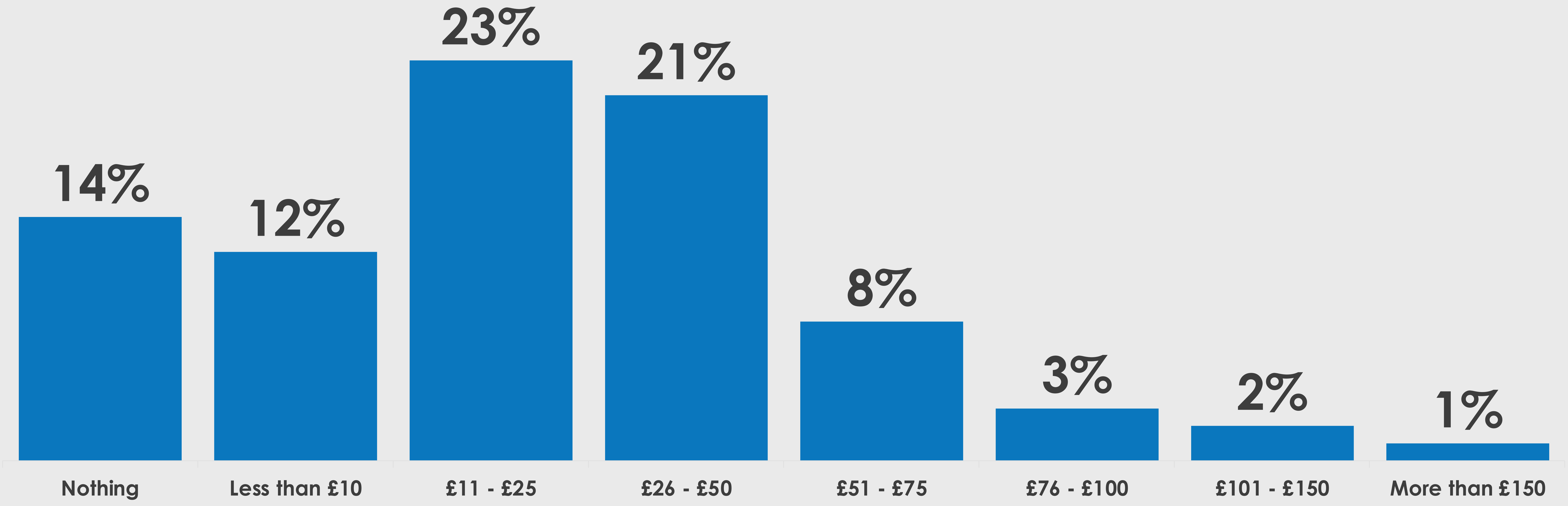
visited an immersive experience with their partner



Source: Culture Vultures 2024

COST EXPECTATIONS

14% of immersive experience visitors expect to pay more than **£50**.



Source: Culture Vultures 2024

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WHY GLOBAL?

Audio

74%

of Capital XTRA listeners attended an immersive experience last year

77%

of Radio X listeners attended an immersive experience last year

Outdoor

77%

of LU users attended an immersive experience last year

41%

of road users attended an immersive experience last year

Source: Culture Vultures 2024

MUSIC FESTIVAL AND CONCERTS

Understanding audiences who visited a music festivals and/or concerts in the UK last year.

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OVERVIEW

61% Visit Music Festivals and/ or Concerts each year

1% increase vs. 2023 survey

71% of ABC1s attend music festivals and/or concerts each year

31% Attend at least once every 2 months

2% increase vs. 2023 survey

Source: Culture Vultures 2024

KEY DEMOGRAPHICS

58%

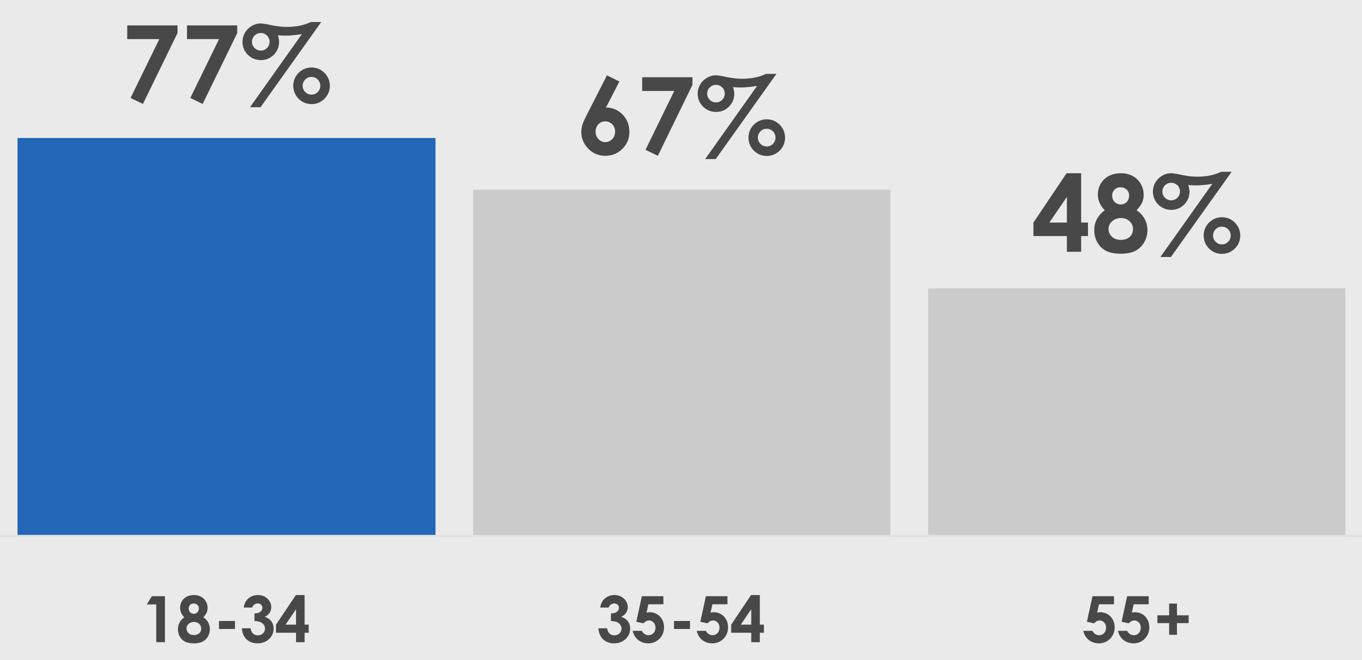
of males visited a music festival and/or concert

65%

of females visited a music festival and/or concert

71%

of ABC1s visited a music festival and/or concert



39%

visited a music festival and/or concert with their friends

Source: Culture Vultures 2024

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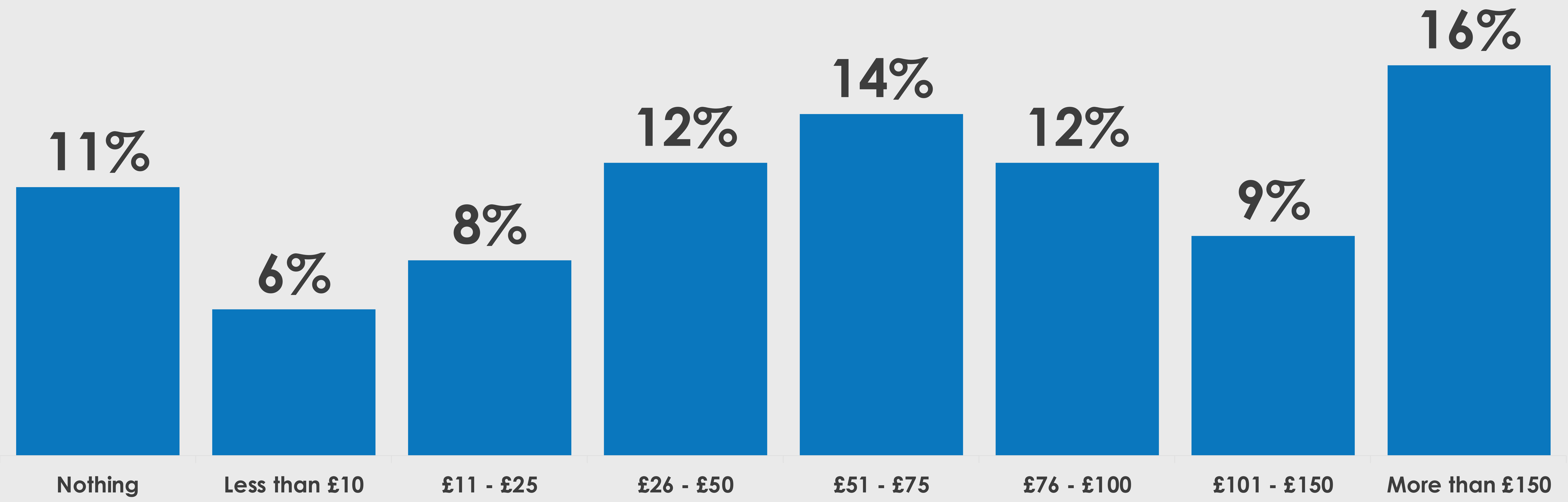
COST EXPECTATIONS

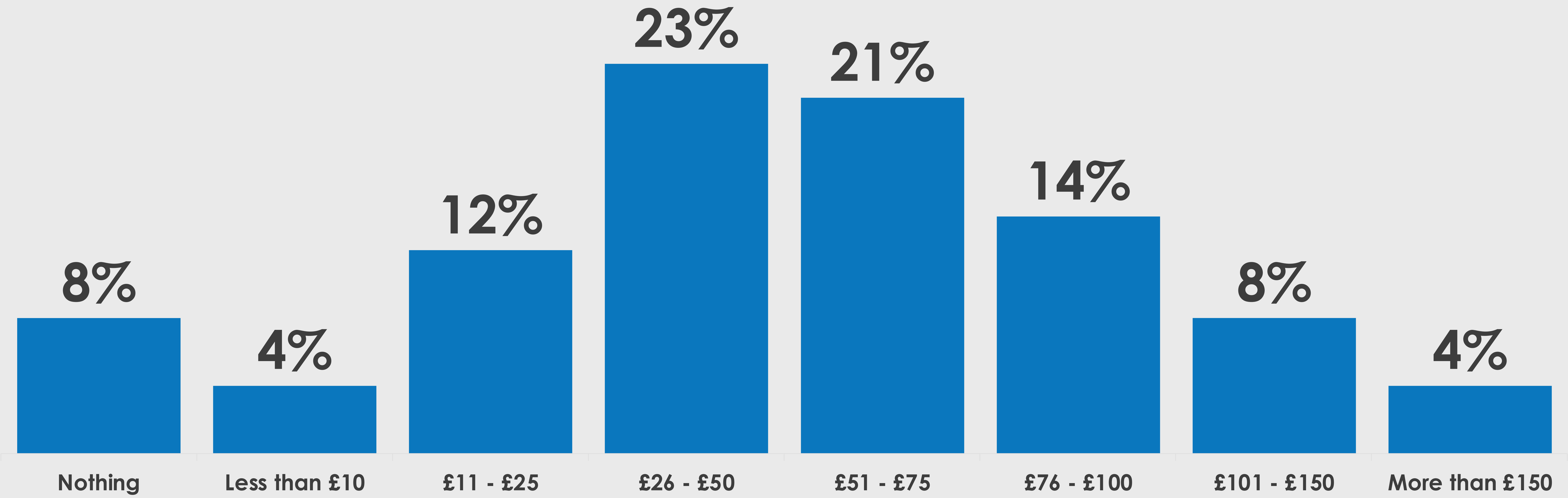
Music festival attenders have a more balanced price range expectation, with the highest figure across all attractions for £100+ at **25%**



Source: Culture Vultures 2024

COST EXPECTATIONS

Music concert attenders have a balanced price range expectation, although they're more likely to expect mid-range pricing.



Source: Culture Vultures 2024

WHY GLOBAL?

Audio

85%

of LBC listeners attended visited a music festival and/or concert last year

90%

of Radio X listeners attended a music festival and/or concert last year

Outdoor

87%

of LU users attended a music festival and/or concert last year

65%

of road users attended a music festival and/or concert last year

Source: Culture Vultures 2024

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ANY QUESTIONS?

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