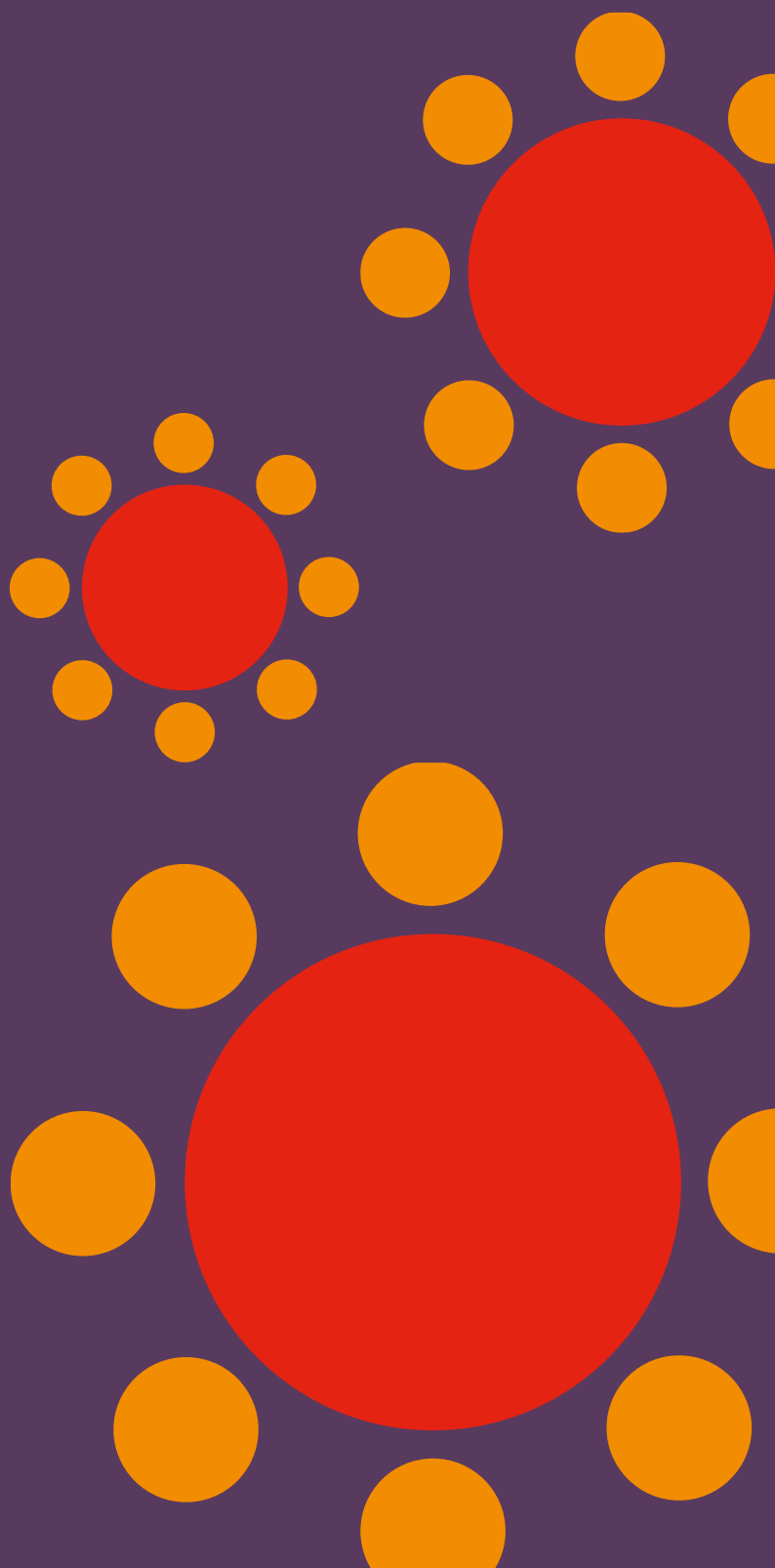


The impact of Covid-19
On Fundraising,
Marketing & Audience
Development
for Arts, Culture
and Heritage
Organisations



arts
fundraising &
philanthropy



This paper summarises research undertaken since March 2020 on the impact of Covid-19 on the Fundraising, Marketing and Audience Development strategies of Arts, Culture and Heritage organisations. It aims to bring together research into one place to support teams developing new strategies.



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IMPACT OF COVID-19 ON FUNDRAISING FOR ARTS, CULTURE & HERITAGE ORGANISATIONS

UK

Coronavirus: 42% of creative businesses have lost all income

Date: 6 April 2020

Context: The Creative Industries Federation collated data to support an open letter to the government calling for urgent grant support for creative businesses and charities that “fall between the gaps” for the existing financial support.

Methodology: A survey of 2,000 creative businesses and individuals.

Research Findings:

- 42% of creative organisations estimate that their income has decreased by 100% since the outbreak
- 63% of creative organisations predict a decrease in annual turnover of more than 50% by the end of 2020
- 1 in 7 creative organisations believe they can last less than 4 weeks on existing reserves
- 45% of creative organisations do not understand the Coronavirus Business Interruption Loan Scheme (CBILS)

[Link to the full research](#)

Covid-19 Impact Survey

Date: 17 April 2020

Context: a-n, the Artists Information Company, conducted a survey to understand the impact of Covid-19 on artists’ livelihoods and creative practices.

Methodology: a survey of 4,070 visual arts practitioners and curators over five days in March 2020, 94% of which were a-n members.

Research Findings:

- Over 60% of respondents were anticipating a reduction in income of over 50% in 2020, with 96% of respondents forecasting some income reduction in this year. 93% forecast a negative impact on income in the longer term
- 65% of respondents anticipated an impact on their access to studio space



- 82% have had upcoming work cancelled, and 59% of respondents have cancelled their own upcoming works
- The most dramatic reduction in income (over 76%) is expected within craft (39% of respondents) and performance (43% of respondents)

[Link to the full research](#)

Survey of Covid-19 effects on the Heritage Sector

Date: Unknown

Context: designed by Historic England to complement the survey conducted by the National Lottery Heritage Fund (which specifically targeted funding recipients) in order to show the full picture of the heritage sector.

Methodology: A survey which received 803 responses from a range of organisational types. 70% of respondents were from organisations with less than 10 employees.

Research Findings:

- 76% of respondents report lost business in the short term
- 58% had postponed or cancelled income-generating events
- 39% had furloughed staff at the time of the survey, but only 5% had terminated contracts
- 31% of businesses have incurred additional costs to cope with social distancing

[Link to the full research](#)

Covid-19 impact – Museum sector research findings

Date: 29 May 2020

Context: ArtFund commissioned research to find out how it could best support as many museums as possible through this period. Cultural Consultants Wafer Hadley surveyed arts professionals about the impact of the Covid-19 crisis on their work and organisations, what they needed in terms of funding and support, and how ArtFund could best help.

Methodology: 400 responses from two surveys (one for museum directors, one for museum professionals), 22 in-depth interviews, and two focus groups.

Research Findings:

Four clear areas emerged in terms of what should be the focus of sector support:

- The future of collections and exhibition programming
- Adaptable digital skills and infrastructure



- How to encourage visitors to return once museums re-open
- How to support an expert workforce through a period of continued uncertainty

Other findings in the report include:

- 85% of directors are concerned about the ability to attract visitors back
- Finding ways to generate income through online activities is an area of interest
- 68% of staff and 77% of directors were interested online training to meet gaps in expertise
- Networks and providing a sense of belonging are more important than ever - 70% of staff would find funding for networks extremely helpful

[Link to the full research](#)

The projected economic impact of Covid-19 on the UK creative industries

Date: 17 June 2020

Context: Creative Industries Federation commissioned research from Oxford Economics to survey the economic effect of the crisis on the creative industries. The UK's creative sector was previously growing at five times the rate of the wider economy, employing over 2 million people and contributing £111.7 billion to the economy. This economic impact report estimates the effect of Covid-19 across creative and cultural sectors in the UK.

Methodology: A survey completed by over 2,000 creative organisations and freelancers, combined with financial modelling by Oxford Economics.

Research findings:

- The creative sector will be hit twice as hard as the wider economy in 2020, with a projected GVA shortfall of £29 billion. This breaks down as follows:
 - Music, performing and visual arts projected to lose £11 billion in revenue (-54%)
 - The music industry is projected to lose at least £3 billion in GVA (-50%)
 - Theatre projected to lose £3 billion in revenue (-61%)
 - Crafts could lose £513 million in revenue (-53%)
 - Museums and galleries could lose £743 million in revenue (-9%)
- 119,000 permanent creative workers will be made redundant by the end of 2020
- Of the GVA shortfall of £29 billion, the majority is projected to take place in London (51%)
- Turnover for arts, cultural and heritage organisations could drop to £2.0 billion over 2020 as a result of cancelled performances. This estimate only takes into account current cancellations and does not account for the reluctance of audiences to return to venues



[Link to the full research](#)

The impact of Covid-19 on culture, leisure, tourism and sport (CLTS)

Date: July 2020

Context: research conducted by the Local Government Association to understand challenges faced by the sector and allow councils to tailor support.

Methodology: a series of interviews with senior council officers for culture and leisure between April and June 2020.

Research findings:

- Councils will have to review their budgets over the summer and very difficult decisions are likely to be made that could impact on non-statutory services such as CLTS
- If councils do have to reduce CLTS provision there was a concern that those who are the most vulnerable in communities would be more adversely affected as they would not be able to access other CLTS provision
- It is likely that there will be an economic slowdown following the pandemic and this could impact in terms of (i) consumers having less disposable income to engage in leisure, cultural and heritage pursuits and (ii) big business no longer sponsoring the arts and culture

[Link to the full research](#)

INTERNATIONAL

Covid-19 and the arts

Date: 1 April 2020

Context: the Greater Philadelphia Cultural Alliance surveyed its member organisations, receiving 120 responses from charities in the arts and cultural sectors.

Methodology: analysis of 120 survey responses, from organisations with income between \$50,000 and \$10million.

Research Findings:

- 62% of organizations have been given more flexibility – extended deadlines for completion, ability to repurpose project grants for operating costs, etc.
- 30% of organizations have received new grants or donations
- 50% of organizations have been contacted by or reached out to funders but have not been offered specific financial relief as yet
- 75% have lost significant earned revenue (refunded tickets, loss of admission/ticket sales, concession/gift shop sales, rentals, etc.)



- 51% cancelled fundraising events
- 42% cannot conduct contributed revenue campaigns (annual fund, major gift solicitations, sponsorships, etc.)
- 25% have lost investment/endowment income

[Link to the full research](#)

Economic impact of Coronavirus on the arts and culture sector

Date: Accessed 22 October 2020

Context: Americans for the Arts created this dashboard to capture Covid-19 related economic impact on the arts and cultural organisation.

Methodology: an ongoing survey of artists, arts organisations and arts agencies. To date, this survey has received 19,161 responses.

Research Findings:

- 37% expect to make temporary or permanent reductions in staff
- 73% of organisations have increased their online presence
- 46% have used their financial reserves
- 89% of organisations have been delivering artistic content in order to raise community spirits and morale during social distancing
- 30% of employees have volunteered time to Coronavirus mitigation efforts
- 66% state reduced philanthropic giving as a major financial concern for the organisation

[Link to the full research](#)



IMPACT OF COVID-19 ON MARKETING FOR ARTS, CULTURE & HERITAGE ORGANISATIONS

UK

N.B. Due to a lack of research on arts marketing post Covid-19, charity sector wide research reports have been included in this section.

Giving from a distance: Covid-19 Insight Report

Date: April 2020

Context: *Open* collated research from its clients and networks to understand the impact of Covid-19 and the opportunities available to charities in this new context.

Methodology: collating research from Media Lab, BCG and other client data.

Research Findings:

- Falling media costs and high response rates offer a unique fundraising opportunity
- 20% increase in active Facebook users
- Up to 66% discounts on premium TV spots (coupled with significant rise in daytime viewers)
- 3x rise in response to DRTV ads vs BAU (international development charity)
- Up to 30% increase in radio listeners of selected stations

[Link to the full research](#)

How is Covid-19 changing charity communications?

Date: 11 May 2020

Context: A CharityComms and Media Trust survey on how charities are using digital communications during COVID-19, as traditional face-to-face communication (whether at events, via out-of-home advertising or on the street) has become impossible during the COVID-19 pandemic.

Methodology: 219 charity representatives were surveyed on how they are communicating. 70% of respondents were from small charities (turnover less than £1million).

Research Findings:

- Email is the most favoured communications channel, used by 86.3% of charities
- Websites are another highly popular communication method, mentioned by 81.7 per cent of charities
- Less than 40% of the charities surveyed are using social media



- April saw an 80% increase in volunteer communications experts registering on CharityComms to share their skills and expertise with charities
- Almost all charities surveyed (97%) would like to access pro-bono or volunteer communications support

[Link to the full research](#)

Facing a fundraising squeeze, charities turn to TV ads

Date: 22 May 2020

Context: research prepared for Digiday shows many charitable organizations have increasingly turned to TV to continue getting their message out there.

Methodology: An analysis of iSpot.tv data.

Research Findings:

- Healthcare non-profits increased TV ad impressions to 5.63 billion from April through May 17, 2020. That figure was up 155% on the same period in 2019
- Social issues organizations increased impressions by 132% over the same period to 2.3 billion

[Link to the full research](#)

INTERNATIONAL

Survey on the impact of the Covid-19 situation on museums in Europe

Date: 3 April 2020

Context: The Network of European Museums (NEMO) published initial results of survey on the impact of the Covid-19 crisis on museums in Europe.

Methodology: Over 650 museums from 41 countries have so far responded to the survey. The survey was completed by museums from all 27 EU member states, from 9 member states of the Council of Europe, and incorporated feedback from museums in the USA, Philippines, Malaysia, French Polynesia and Iran.

Research findings:

- 92% of museums are closed. The average reported weekly revenue loss in the European museum sector was 80%
- More than 60% of the museums have increased their online presence, while only 13.4% have increased their budget for online activities



- 40% of the museums that responded to the survey have noticed increased online visits. Of those, 41% note an increase of visits up to 20% per week on their website, and 38% note an increase of up to 50%
- Most museums are using social media more than before, working with hashtags and featuring individual objects to their audiences. Virtual tours and online exhibitions have increased.

[Link to the full research](#)



IMPACT OF COVID-19 ON AUDIENCE DEVELOPMENT

UK

ScotInform Cultural Survey

Date: Launched 12 May 2020 and ongoing

Context: Designed by ScotInform and distributed by the cultural sector, the aim of the ScotInform Cultural Survey is to understand how audiences were engaging with cultural organisations before lockdown, how this has changed during lockdown, and what we might expect as lockdown restrictions are eased.

Methodology: 5,031 responses from residents of Scotland, covering every local authority area. The data is split into five separate reports, one each for museums, galleries, gardens, theatres and wildlife attractions.

Research findings:

- 78% of respondents had engaged with museums online via social media or their websites in the past, but during lockdown the figure declined to 59%. For galleries, the figure also fell from 67% to 55%
- In the year before lockdown, 48% of museum visitors had made charitable donations to a cultural organisation (30% to a museum). During lockdown, only 28% had done so (7% to a museum)
- 74% of respondents said that online engagement made them 'look forward to going back'
- 16% of theatre attendees had donated to a theatre in the year before lockdown, a percentage which has remained steady since March
- 94% of respondents said that if safety measures were in place, they would like to see exhibitions – events scored 56%

[Link to the full research](#)

Understanding changes to the way that we consume culture at home during Covid-19

Date: 20 May 2020

Context: A study conducted by the Creative Industries Policy and Evidence Centre (PEC) in partnership with the Intellectual Property Office (IPO) and research agency, AudienceNet. By following a cohort of adults over a 6-week period starting from 9th April, researchers aimed to understand the impact that the crisis is having on the creative industries, including theatre, music, film, TV, video games and publishing.

Methodology: Survey of 1,000 representative adults.



Research Findings:

- 50% of respondents had watched filmed performances or looked at art online in the first week of the study, with 20% having started each activity since the outbreak of Covid-19
- 19% of the sample watched filmed performances weekly in week 2 of the study, decreasing to 13% by week 5
- 25% of people who accessed online content during lockdown have done so for the first time
- 38% of people increased their creation of content, with 17% taking it up for the first time
- The consumption gap for streaming TV programmes between class (social grades of ABC1 and C2DE) increased from 6% to 11% during the study
- All artforms studies saw an increase in the proportions accessing them compared to 2019 levels

[Link to the full research](#)

After the Interval

Date: 27 May 2020

Context: Research conducted by Indigo investigates how people are feeling about missing live events, how they feel about returning to live events and if they are making bookings.

Methodology: Cultural organisations (137 participated) were invited to send an email survey to a sample of their recent and frequent attenders. Of this cohort, 137,000 arts audiences responded. 81% of respondents were aged 45+; 59% of audiences attended live events more than 4 times per year before Covid-19. 46% of respondents were from theatre audiences. There was no data available on gender or ethnicity.

Research Findings:

The most current information available (Wave 2, 7 May – 27 May) found that:

- 94% of respondents felt they were missing live events
- 74% wanted to get back to the buzz of a live event
- 57% 'look forward to supporting their local venue'
- Only 16% of respondents were booking events, and half of these were for after November 2020
- Only 19% would return just because venues re-open
- 42% would not consider booking events for at least four months *[until Autumn 2020]*
- 75% of respondents would feel safer with social distancing measures, such as avoiding queues, limiting attendance, and seats spaced at least 2m apart

[Link to the full research](#)



ALVA Attractions Recovery Tracker (The Association of Leading Visitor Attractions)

Date: 9–12 June 2020

Context: Research by the Association of Leading Visitor Attractions (ALVA) aimed to find out how people are feeling about visiting attractions, so as to build trust and confidence among the attractions visiting public, to help the attractions 'sector get back on its feet quickly and make a sustainable recovery.

Methodology: This is the third wave of online research by ALVA, which tracks responses by 1,065 people, representative of the UK-wide 'attractions-visiting public'.

Research Findings:

- 10% of the attractions-visiting market – an estimated 4m adults – have already made a visit after re-opening, mainly to country parks (3.0m) but also to gardens (1.5m). This survey was conducted a week after the reopening of the first outdoor venues (gardens) in England on 1st June 2020
- Since the second wave of ALVA research (13 – 18 May), there was a significant uptick in visitor confidence, with the biggest changes in those wanting to return to sites as soon as possible seen in zoos and safari parks (+13%), country parks (+16%) and gardens (+10%)
- Half of the attraction visiting market claim they will visit somewhere as soon as the opportunity arises (or have visited already). This rises to 64% among frequent attraction visitors (those who visit more than eight times a year)
- 82% of respondents expect to feel more uncomfortable than usual at indoor venues
- 48% of respondents expect to feel more uncomfortable than usual at outdoor venues
- Areas marked as generating high anxiety and having high use by respondents are (i) toilets and (ii) indoor seating at cafés / restaurants.
- The measures that would make audiences most comfortable about visiting are:
 - Distancing measures in queues and around site
 - Limiting number of visitors on site at one time
 - Staff making sure visitors follow distancing

[Link to the full research](#)

After the Interval (Act Two)

Date: 15 July 2020

Context: This research conducted by Indigo investigates how people are feeling about missing live events, how they feel about returning to live events and if they are making bookings. Act Two acts as a follow up to the original After the Interval report.



Methodology: Cultural organisations (258 participated) were invited to send an email survey to a sample of their recent and frequent attenders. Of this cohort, 103,000 arts audiences responded.

Research Findings:

- 18% are booking for events, and more than 50% of these bookings are for events from October
- 66% would consider attending events if venues reopened with social distancing
- 69% would not consider booking for events for at least 3 months
- 84% are interested in culture online, and just over 50% would pay for it
- 94% are interested in culture outdoors, and more than 75% would pay for it
- 81% were concerned about the survival of cultural organisations
- Audiences expect to spend 4% more on culture

[Link to the full research](#)

Audience research group – insight highlights

Date: 23 July 2020

Context: Society Of London Theatre/UK Theatre developed this paper in order to inform the theatre sector’s efforts to reopen.

Methodology: collating consumer sentiment and behaviour evidence from over 25 authoritative research sources.

Research Findings:

- Only 20% will reopen to theatre when it reopens
- 50% will consider booking when it is perceived to be safe
- 46% of theatre-goers feel concerned about their finances, with 54% of 25–49 year olds worried about their finances
- 93% of theatre goers are missing the theatre
- 3% more of the UK population has expressed an intention to look for places of cultural interest post-lockdown, as compared to pre-crisis levels
- 68% of those new to home-working want to continue, boosting localism

[Link to the full research](#)

Creative Scotland – Covid-19 Population Survey

Date: August 2020

Context: 56 Degree Insight were commissioned by Creative Scotland to look at attitudes to arts participation and attendance across multiple waves of research from July 2020 – January 2021. This report summarises findings from the first wave (completed August 2020)



Methodology: online survey with 1,033 participants making up a representative sample of the Scottish population.

Research Findings:

- 57% of the population missed cultural activity during lockdown
- 96% of the population engaged in cultural activity at home during lockdown (listening to music, watching films and reading for pleasure were the most popular forms of cultural activity)
- 21% reported watching arts performances online, and 10% went on online tours of museums or galleries
- Only 20% of these said they would be willing to pay for online cultural activities in the future. Willingness to pay was highest for those who had attended online activities for children or remote learning sessions
- Demand for all cultural activity has reduced since the Covid-19 outbreak, for example a net reduction of 5% for visiting a historic place and 26% for attending a live music event
- 15% of the population would be more likely to attend venues if a form of accreditation for safety standards was in place
- Approximately a quarter of the population would be more likely to attend with social distancing (physical distancing 24%, new seating configurations 23%, reduced audience numbers 23%)
- 25% of the population said they would attend cultural events more often than pre-Covid levels should a vaccine be found or the virus be eradicated

[Link to the full research](#)

Covid-19 Cultural Participation Monitor

Date: November 2020

Context: The Audience Agency commissioned Dynata to carry out a population survey online, with quotas based on age, sex, ethnicity, region and Audience Spectrum segment.

Methodology: 6,055 survey responses were received in the first wave, collected from late October to early November, 2020.

Research Findings:

- 80% of respondents have seen a change to their amount of time or money
- 40% of respondents have seen change to both (e.g. 19% more time less money, 12% more time more money)
- 33% had watched an online performance or event since March
- Above average engagement in London, South East, West Midlands and East of England. Lowest engagement with online performances in North East
- Respondents from Black, Asian and Mixed-ethnic backgrounds were around 80-90% more likely to engage than those from white backgrounds



- Of those who accessed digital content, 17% paid a set ticket price, 19% made a donation / contribution, and 11% said it was part of a paid membership
- Going forwards, having a clear refund policy in case of cancellation (89% marked as very or quite important) and providing information on safety measures (85%) were the most important factors in deciding to attend events again

[Link to the full research](#)

INTERNATIONAL

Post-pandemic, which cultural entity types are people more likely to revisit?

Date: 25 March 2020

Context: A survey conducted by IMPACTS Experience looking at when people are planning their next visit to cultural organisations, put together to help cultural executives understand the likely duration that the current COVID-19 outbreak will impact their visitors' planning cycles, to inform their marketing strategies.

Methodology: Survey of 2,299 US adults who profile as active visitors to cultural enterprise. Responses are given on a scale of 1 to 100, where 1 means "a significant decrease in likelihood of visiting," a response of 50 means "the same" or "no change in likelihood of visiting," and a response of 100 means a "significant increase in likelihood of visiting".

Research Findings:

- Respondents reported an increase in likelihood of visiting outdoor activities (public parks (59), zoo (55), and public beach (53)). An increase was also reported for aquariums (53) and for museums (52).
- Data indicated a decrease in likelihood of attending concert halls (37), other performing arts – including theatre and dance – (36), and cinema (35).

[Link to the full research](#)

Audience outlook monitor

Date: June 2020

Context: This attitudinal study was launched by WolfBrown as an international collaboration between top researchers, funders, service organisations, and hundreds of cultural organisations who want to make informed decisions about programming and audience development.

Methodology: Longitudinal tracking study with 22 global study partners, 584 participating organisations, and 255,190 survey responses so far.

Research Findings:



- Percentages of audiences and visitors who say they've watched any digital broadcasts or other digital content offered by an organisation (once or more than once) range from a low of 13% to a high of 29%
- Between 15% and 20% strongly agree with the statement "Once I buy a ticket to a live performance, I'd like to have the choice of attending in-person or watching a live stream at home." another 25% somewhat agree with the statement
- 40% of loyal audiences are open to the live stream option, and seem willing to pay for it

[Link to the full research](#)

Culture Track – Culture and Community in a Time of Crisis

Date: 7 July 2020

Context: Culture Track is a national survey of audiences that has been conducted since 2001. This survey and report are a special addition to support audience engagement during and following Covid-19.

Methodology: Survey of 124,000 audience members from 653 cultural organisations across the US.

Research Findings:

- 54% of respondents want more connection with other people in their life, and 54% want more fun
- In the absence of cultural activities, 65% of respondents miss spending quality time with family or friends most, 53% miss having fun most, and 39% miss relaxing or feeling less stressed most
- 81% of respondents reported doing something creative during the pandemic
 - 62% cooking or baking something new
 - 37% singing
 - 27% making something by hand (Craft)
 - 20% painting / drawing (art)
- 53% have participated in one or more cultural activities
 - Most popular: pre-Covid recorded performances and live-stream performances
 - Most valuable: online activities for kids, and online classes and workshops
- 13% have paid for access to the digital cultural content that they used
- Many respondents using online cultural offerings had not physically visited the same kind of cultural organisations in the past year
- Cultural centre, 74% non-visitors
- Natural history museums, 57% non-visitors
- Theatre, 55% non-visitors



- 69% of respondents had done little to no planning for future arts and culture experiences
- 53% of respondents want cultural organisations to help communities laugh and relax during the crisis
- 49% of respondents want cultural organisations to help communities stay connected during the crisis
- Organisations control 6 / 10 of the factors that will influence the decision to return to factor (percentage who selected):
 - Increased cleaning (54%), reduced admission levels (46%), enforcement of masks for visitors (43%), enforcement of masks for staff (31%), health screening prior to entry (29%), organisation deciding to reopen (19%)
 - Out of organisational control: vaccine availability (50%), government announcement that return is safe (41%), widespread immunity testing (40%), others attending (14%)
- 96% of respondents identify that arts and cultural organisations can help communities during Covid-19, but only 1 in 3 identified organisations helping communities during the current crisis

[Link to the full research](#)



IMPACT OF COVID-19 ON THE WIDER CHARITY SECTOR

UK

Coronavirus Impact Survey

Date: 30 March 2020

Context: A survey conducted by the Institute of Fundraising in partnership with the Charity Finance Group and National Council for Voluntary Organisations, collating data from over 500 charities on the impact of the crisis on their organisations. The data in the survey was analysed by PwC and the results reflect the urgent new situation charities face as they re-forecast their income and take steps to respond to the huge challenges they face.

Methodology: A survey of 1,100 organisations (26% with turnover less than £100k, 39% with turnover between £100,000 and £1million, 35% with turnover over £1million)

Research Findings:

- Charities are expecting, on average, a decline in voluntary income of 48% against budget
- Charities expect a decrease in total income of 31% against their total income from the previous year
- 91% have or expect to have their cash flow disrupted, with 62% indicating that these would result in reduced charitable activity, 42% saying it would leave them with a reduced ability/inability to cover payroll and 34% with a reduced ability/inability to cover utility bills/mortgage payments.
- 83% say that the most important thing for their organisation's resilience/sustainability over the coming 3-6 months is access to emergency grant funding
- 53% say they want a reduction of bills and liabilities such as VAT or rent
- Only 19% said that access to free or low-cost loans or overdraft facilities would best enable/empower their organisation to play a role. This was the least popular available option from respondents who think their organisation could play/is playing a role in responding to the current situation

[Link to the full research](#)

How do charities adapt to the impact of Covid-19?

Date: 13 May 2020

Context: Research by Opinium looking at public attitudes to charities and current charitable behaviour, and what charities can do to encourage public support going forwards.

Methodology: Survey of the general public – further methodology and sample size unpublished.



Research Findings:

In the month before the survey:

- 23% of respondents gave one off or occasional donations
- 12% donated to a fundraiser
- 10% set up regular donations
- 8% lent their voice online or offline

Of those who had supported a charity in the month before the survey:

- 37% donated to Coronavirus emergency funds
- 51% donated to causes they have previously supported
- 28% gave to a new cause that is unrelated to the pandemic

During the lockdown:

- 33% of respondents donated money to charity more than usual (50% no change, 9% less than usual)
- 22% of respondents lent their voice online or offline more than usual (38% no change, 6% less than usual)

[Link to the full research](#)

Legacy foresight

Date: 15 June 2020

Context: Legacy Foresight are the UK's leading analysts of the legacy and in-memory sectors, and regularly forecast changes to legacy income in the UK.

Methodology: not publicly available.

Research Findings:

- Legacy income is expected to decrease by between 4% and 23% this year
- Legacy income is expected to grow by between 9% and 13% over the five-year period up to 2024.
- Over the next five years UK charities are expected to receive 1.2% to 1.6% more bequests than they otherwise would have done if the Covid-19 pandemic had not occurred

[Link to the full research](#)

Impact on the charity sector during coronavirus

Date: 18 June 2020

Context: Research was conducted by the Institute of Fundraising, NCVO, and Charity Finance Group, with support from PwC. This research follows the Coronavirus Impact Survey which was conducted in March 2020.



Methodology: A survey was carried out from 30th April to 25th May 2020. Number of responses varied by question, with the maximum number of responses for a question being 234. 38% of respondents had turnover less than £100k, 38% had turnover between £100,000 and £1million, 25% had turnover over £1million.

Research Findings:

- On average charities received 29% less income than they budgeted for in the period between 23 March – 12 May 2020
- Trading income was 72% lower than expected
- Voluntary income was 14% lower than expected
- Income from grants from trusts and foundations was 29% higher than expected
- Income from government in the form of grants and contracts was 51% higher than expected
- 84% of charities reported a decrease in their total income during lockdown
- 15% of charities reported an increase or a significant increase in their total income during lockdown

[Link to the full research](#)

YouGov profile data

Date: 4 August 2020

Context: Civil Society drew data from YouGov profiles to understand how Covid-19 has affected individual giving.

Methodology: Survey of YouGov panellists across the UK.

Research Findings:

- 21% of a sample of 83,000 people said they had donated to charity in the past three months
- 48% of donors were aged over 55 (only 38% of the population is in this age bracket)
- 51% of donors gave money as a one-off compared to 43% as a regular donation
- 11% gave ad hoc donations as well as regular contributions

[Link to the full research](#)

The impact of Covid-19 on individual giving

Date: May 2020

Context: Woods Validata sought to use data to understand how Covid-19 has impacted individual giving over the first three months of the Covid-19 pandemic in the UK.



Methodology: In total the data used includes a total of 18 clients, 34 campaigns, involving 2,955,000 mailing volume plus digital and press channels.

Research Findings:

- There has been a 25% increase in actual versus predicted responses to cash campaigns
- Emergency appeals are outperforming forecasted expectations by 40%
- Credit card payments are up 28%
- Online payments are up 286% compared to 2019
- Regular Giving cancellations saw a spike in Feb and March but are now stabilising

[Link to the full research](#)



Emerging themes

From these research reports, the following themes emerge in designing new strategy across fundraising, marketing and audience development:

1. **Relevance and urgency:** in the context of fundraising, arts and cultural organisations must position themselves as vital to supporting communities through the Covid-19 crisis, whether through artistic activity or repurposing resources to aid the frontline efforts. Showing supporters how your organisation is doing urgent work in the community is the foundation for leveraging support at this time.

Key reports: (i) Culture Track – Culture and Community in a Time of Crisis; (ii) How do charities adapt to the impact of Covid-19?; (iii) ScotInform Cultural Survey.

2. **Safety first:** when it comes to marketing and audience development, messaging around safety measures and precautions will be as important as artistic messaging in coming months. Several studies on audience attitudes have shown that there are factors within an organisations power that will make audiences return more quickly, so it is important for safety measures to be established and clearly articulated to increase the pool of those happy to return to cultural venues.

Key reports: (i) Creative Scotland – Covid-19 Population Survey; (ii) ALVA Attractions Recovery Tracker; (iii) Culture Track – Culture and Community in a Time of Crisis.

3. **Community is central:** for all three disciplines, arts organisations' role in their local community and local audiences will be the most important in seeing success going forwards. This is true in multiple ways – if desire to return to culture uplifts prior to audiences feeling comfortable on public transport, local arts venues may be chosen more than usual. As individuals continue to work from home, again, audiences may choose not to travel into city centres to see work when there is work being delivered locally. Using messaging that supports this localised perspective across fundraising and marketing will engage new donors and audiences.

Key reports: (i) Culture Track – Culture and Community in a Time of Crisis; (ii) After The Interval; (iii) Audience Research Group – Insight Highlights.

4. **Digital is more important than ever:** whilst this may not be a surprise, digital methods of fundraising, marketing and reaching audiences are more important than ever whilst Covid-19 restrictions are in place and will likely remain so long into the future. This has been evidenced by reports showing the increase in donations made through digital methods, the uptick in audiences accessing content digitally, and in those using digital methods for marketing and engagement.

Key reports: (i) Understanding Changes To The Way That We Consume Culture At Home During COVID-19; (ii) After the Interval (Act Two); (iii) Giving From a Distance: Covid-19 Insight Report



- 5. Digital earned income models need development:** contrary to (4), several pieces of research show that whilst significant numbers of the population are accessing culture digitally, less would be happy to pay for this engagement. As organisations and as a sector, work must be done to establish valuable digital offers with viable earned income models.

Key reports: (i) *After the Interval (Act Two)*; (ii) *Creative Scotland – Covid-19 Population Survey*; (iii) *Audience Outlook Monitor*.

