

indigo

After the Interval

National Audience Research

Audience views on returning to live cultural events, booking tickets now and in the future, and missing out on events during lockdown.

Wave 1 | 16 April - 6 May 2020

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86K

Audience responses

192

Organisations

During
Lockdown

93%

of respondents say they are **missing** attending live events at the moment

74%

want to get back to the **BUZZ OF A LIVE EVENT**

55%

Look forward to **SUPPORTING** their **LOCAL VENUE**

Booking
NOW for
events

Only
17%

of respondents are booking for events

Half

of those booking are for events from **NOVEMBER**

When will
Audiences
Return?

Only
19%

would return to attending events just because venues re-open

41%

would not consider booking for events for **at least 4 months**

Safety &
Comfort

3/4

Would feel safer with some form of social distancing measures

Avoiding queues
Limiting attendance numbers
Seats spaced >2m apart

Context

The UK population went into 'lockdown' in response to the Coronavirus pandemic on 23 March, and at the point audiences started to receive and respond to this survey, they already had experienced 3½ weeks of staying at home. No cultural venues were open during this period, and most had announced cancellation of events until at least the end of May, and some beyond.

Many organisations were having to make quick decisions about if and how to cancel performances, and whether or not to put Autumn and 2021 seasons on sale. Typically, the March/April period would coincide with many organisations announcing their full 20/21 seasons of work, scheduled to run from September 2020, and so data about what audiences' perceptions of returning to events was urgently needed.

Indigo developed and offered the survey free to all UK and Ireland cultural organisations, to provide the sector with the information they needed as quickly as possible. Additionally, Indigo offered to provide each participating organisation with its own results in real time whilst also aggregating the data into a large national data set for wider sharing amongst the sector.

Cultural charities had the option to ask additional questions related to how audiences might consider supporting them financially when they re-open.

Participating organisations have had access to weekly reports of the national data, and this report now aims to aggregate and summarise the total findings after 3 weeks, as Wave 1.

We will continue to publish regular updates and observations on the findings as they develop, further organisations join the project, and more audiences respond. These will be available on www.indigo-ltd.com

Section 1: Methodology and Sample

Cultural organisations were invited to send an email to a sample of their recent¹ and frequent² attendees inviting them to complete the survey via a link provided. 10 organisations also posted a survey link on their social media sites.

Responses were limited to 1,000 per organisation. Emails were sent out in waves and responses analysed for response collected from 16 April - 6 May (3 weeks).

192 cultural organisations have participated in After the Interval to date, and these are listed in Appendix 2.

Over the 3 week period over 86,000 responses from audience members were received.

¹ Recent: have attended an event in the last 2 years

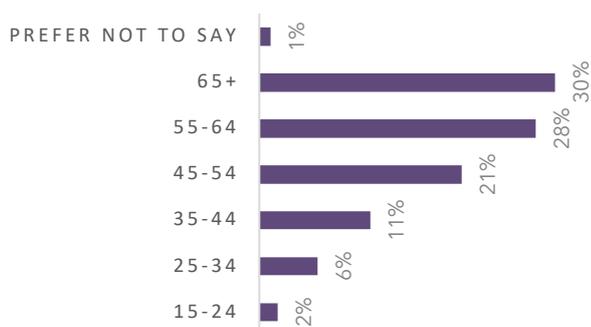
² Frequent: have attended more than once

Sample breakdown

Responses: 86,524 (wave 1)

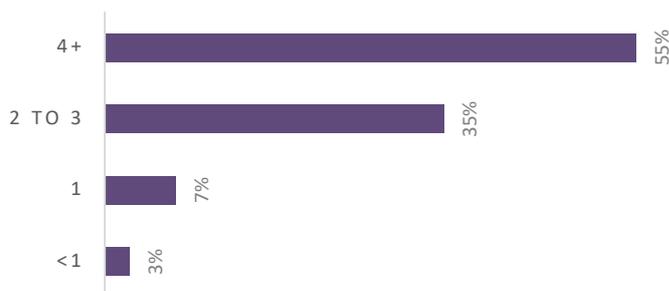
Respondents were representative of an ENGAGED CULTURAL audience with a high frequency of attendance. These are the people we most wanted to hear from in terms of their likelihood to reattend.

AGE



FREQUENCY OF ATTENDANCE

(PER YEAR) BEFORE COVID-19

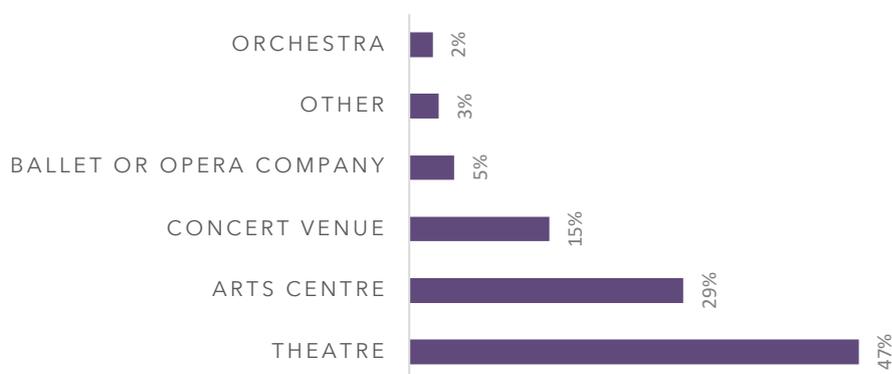


Responses by region/country³

Region/Country	Percentage
England	78%
East Midlands	7%
East	9%
London	10%
West Midlands	5%
North East	5%
North	7%
North West	18%
South East	4%
South West	4%
South	9%

Wales	11%
Scotland	8%
Touring	2%
N Ireland	1%

Responses by organisation type



³ Region = where participating organisation is based and/or primarily operates

Section 2: Overall findings

2.1 Missing events during lockdown

Q: Are you **missing the opportunity** to attend live events at the moment?

Responses: 86,377

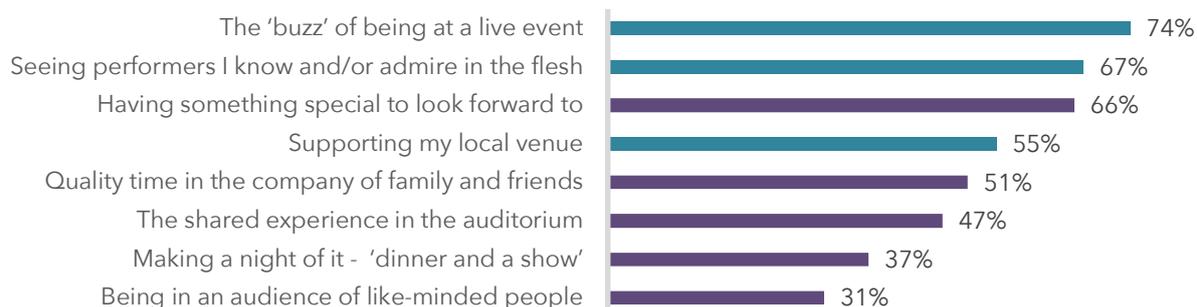
93%

of respondents say they are missing attending live events at the moment

Yes - a lot	60%
Somewhat	33%
Not really	6%
Not at all	1%

Q: What are you **most looking forward** to about attending events again in the future?

Responses: 79,042



74%

want to get back to the BUZZ OF A LIVE EVENT

67%

want to see PERFORMERS UP CLOSE

55%

want to SUPPORT their LOCAL VENUE

2.2 Booking NOW for Events in the future

Q: Are you actively booking NOW for events in the future?

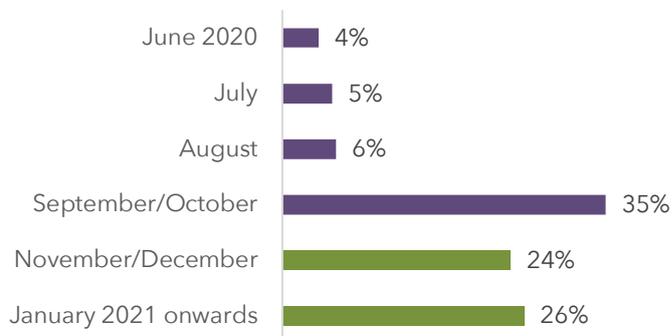
Responses: 84,197

Only
17%
of respondents are booking for events

Yes	17%
No	83%

Q: When are the events that you are booking for scheduled to take place?

Responses: 14,015



Half
of those booking are for events from
NOVEMBER

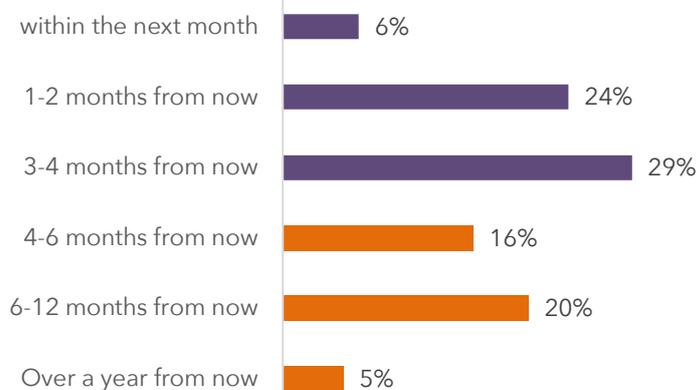
2.3 When will audiences return?

Q: 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?

Responses: 68,595

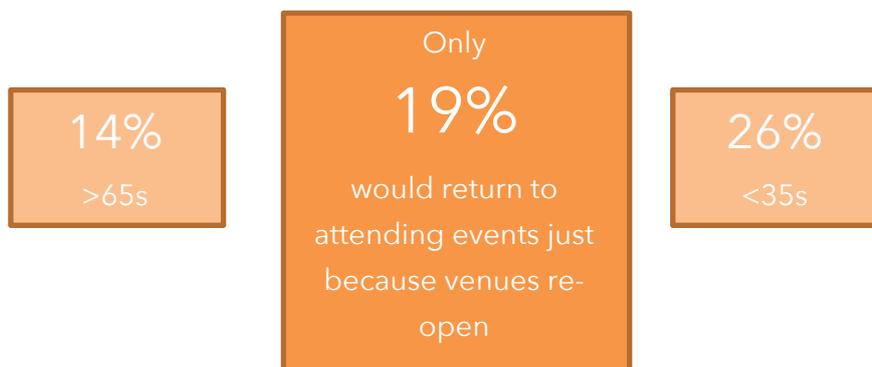
41%

would not consider booking for events for **at least 4 months**



Q: Which of the following statements best fits how you're currently feeling about the possibility of coming out to events at a venue again?

Responses: 69,251



2.4 Safety and Comfort

Q: Would any of the following help you to feel safe and comfortable going to an event at a venue again?

Responses: 52,065

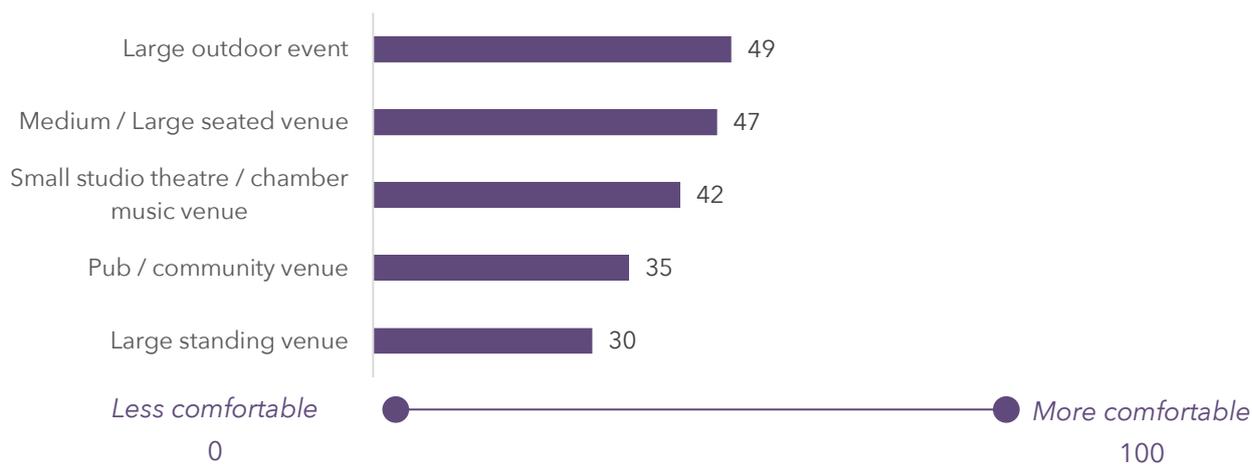
3/4

Would feel safer with some form of social distancing measures



Q: Are there certain **types of venues** that you would feel happier coming back to before others?

Responses: 62,952



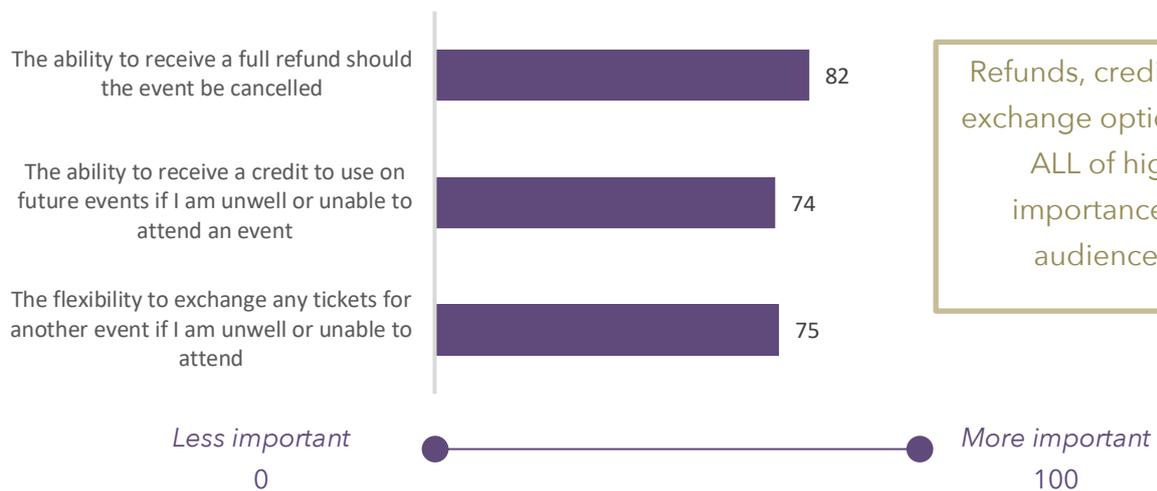
NO type of venue scores highly, but large standing venues are the least attractive

All of these (except large standing venue) scored over 50 for <25s

2.5 Reassurances around refunds and exchanges

Q: Please tell us how important each of the following would be in influencing your decision to book for future events

Responses: 65,638



2.6 Supporting Cultural Charities

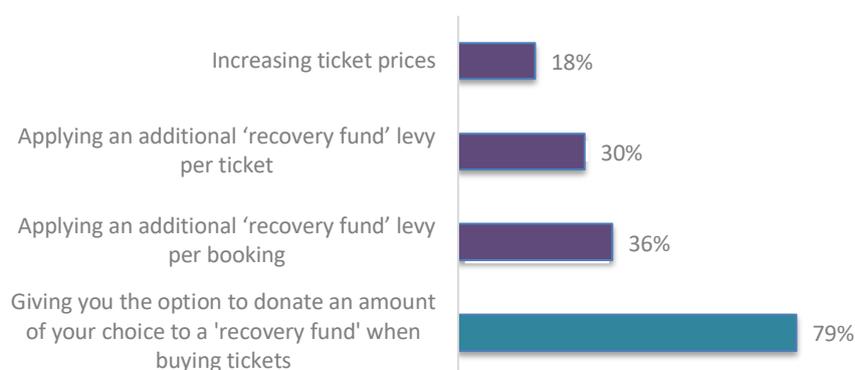
The following questions were only asked on the surveys sent out by Cultural charities.



Responses: 50,232

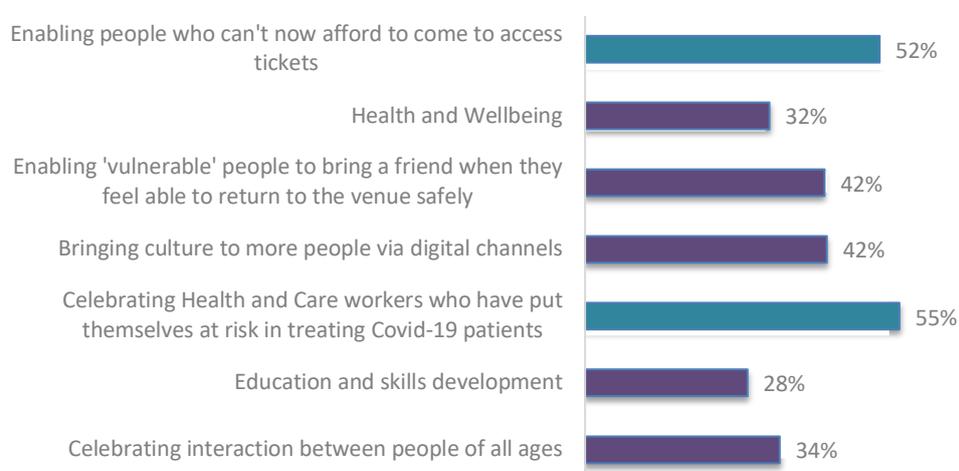
Q: When the organisation re-opens, their financial position may be challenging, and so may consider various options to ensure a successful re-opening. Please could you let us know which of these you would feel are most appropriate for cultural charities to consider?

Responses: 49,539



Q: We're aware that there will be many in our community whose lives have been devastated by the effects of Covid-19 and cultural organisations will want to play a part in their recovery. Which of the following **initiatives** would you feel most affinity with supporting, if you were financially able?

Responses: 47,133



Section 3. Key metrics compared

We have compared the following 4 key metrics:

- **% of respondents actively booking** for events now, and of those
 - o **% booking for events not before 2021**
- Of those NOT actively booking
 - o **% of those who believe they will NOT book for at least 4 months**
- **% of respondents who say they would feel comfortable coming back to events** just because the venue has re-opened

3.1 Week by week

% of those currently booking is falling

% of respondents actively booking now



WEEK TO 22/4

WEEK TO 29/4

WEEK TO 6/5

Those who are booking are doing so for events further off

% of bookers NOT booking for events before 2021



WEEK TO 22/4

WEEK TO 29/4

WEEK TO 6/5

Lack of confidence about returning remains unchanged

% who will come to events if venues re-open



19%

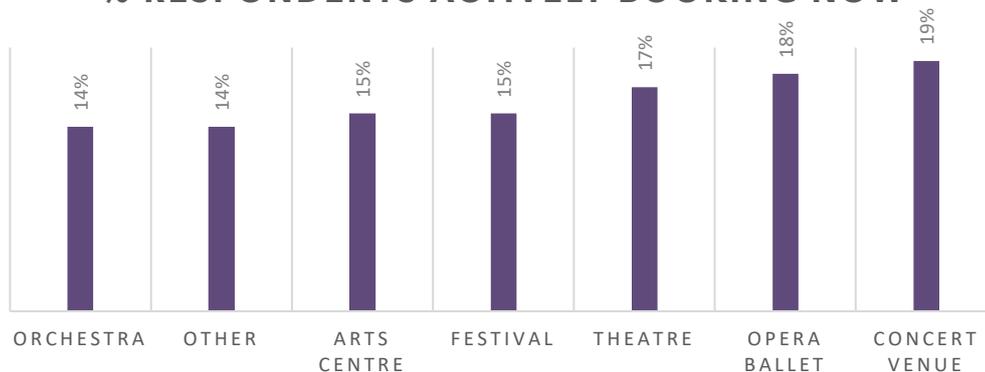
19%

19%

3.2 By organisation type

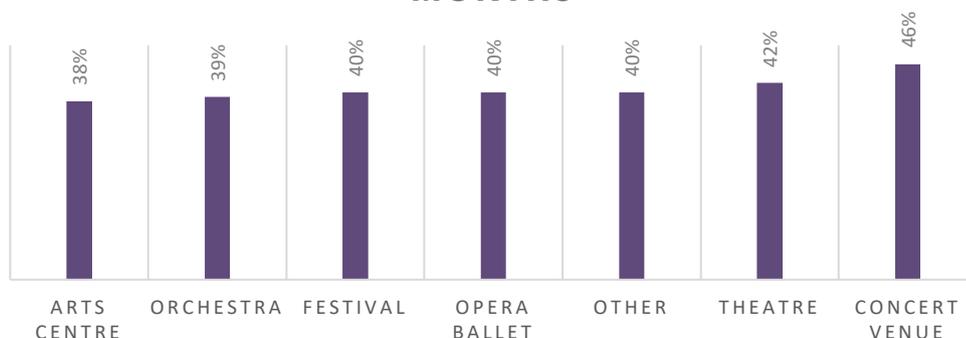
Orchestras are the least likely to have respondents booking now

% RESPONDENTS ACTIVELY BOOKING NOW



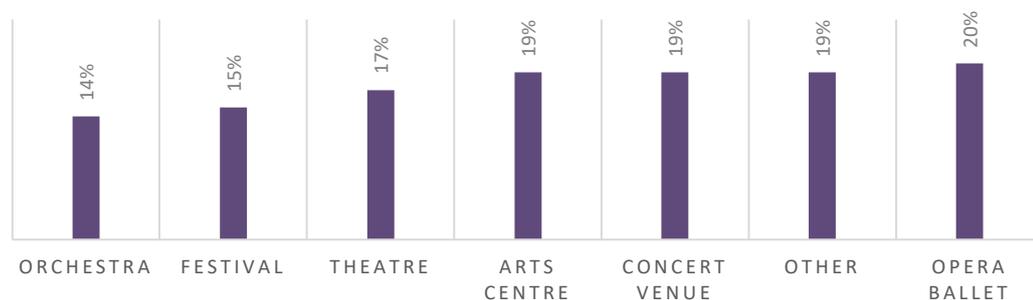
Concert Venues and **Theatres** have the highest proportion of respondents who will not consider booking for at least 4 months

% OF RESPONDENTS WHO WILL NOT CONSIDER BOOKING FOR AT LEAST 4 MONTHS



Orchestras and **Festival** respondents are the most nervous about simply coming back to venues

% WHO WILL COME TO EVENTS IF VENUES RE-OPEN



3.3 By region

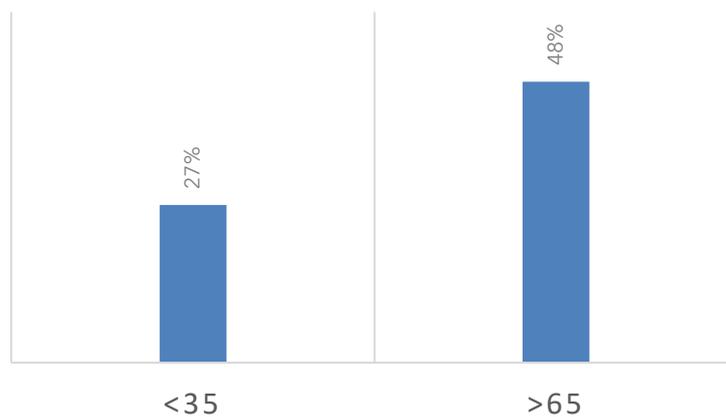
There are currently no significant regional differences in the data but we will continue to monitor this and report further in Wave 2.

3.4 By age

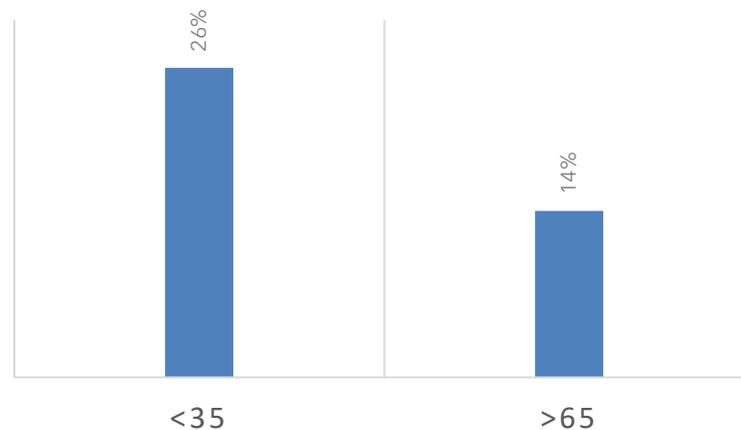
Age plays a significant part in

- WHEN people consider they will be willing to book again and
- HOW they feel about returning to venues

Almost half of over 65s say it will be **at least 4 months** before they think they will consider booking, compared with only 27% of under 35s.



Only 14% of over 65s say that **venues just re-opening** would make them feel comfortable about returning, compared with 26% of under 35s.



Appendix 1: About Indigo-Ltd

Indigo Ltd is a specialist consultancy working in the Arts, Heritage and Cultural sectors. We specialise in projects involving marketing, audience development, branding, research and consultation, strategic planning, fundraising and organisational development.

Founded in 2007, Indigo's partners and associates spent their earlier careers as marketing and fundraising practitioners from cultural organisations, and are regularly embedded in cultural charities to develop their professional practise.

Katy Raines, the author of this survey, is founding partner of Indigo, and regarded as one of the UK's leading consultants on data-driven marketing for Cultural Organisations. She has developed and led research and implementation programmes for large and middle scale organizations throughout the UK and Europe. She has a particular passion for CRM and segmentation, and in using data to effect change and drive an audience-led approach for any cultural organisation.

Her current clients include The Lowry, MAC Belfast, Warwick Arts Centre, National Museums Liverpool, Shakespeare's Birthplace Trust and Coventry City of Culture 2021. Prior to becoming a consultant in 2006 she held a number of senior marketing roles in large scale venues, holds a Music degree from Cambridge University and a 1st-class MBA from Durham University.

Appendix 2: Participating Organisations

England and Wales

ADC Theatre
Alarum Productions
Anvil Arts
APEX Bury St Edmunds
Arcola Theatre
Artsadmin
artsdepot
Ashcroft Arts Centre
Barbican
BBC Philharmonic
Beck Theatre
Belgrade Theatre
Birmingham Contemporary Music Group
Birmingham Hippodrome
Birmingham Rep
Birmingham Royal Ballet
Bishop Auckland Town Hall
Blackfriars Theatre and Arts Centre
Blackpool Grand Theatre
Blackwood Miners' Institute
Bradford Theatres
Bridgewater Hall
Bristol Old Vic
British Youth Music Theatre
Britten Sinfonia
Camberley Theatre
Cambridge Live
Carmarthenshire Theatres
Carn to Cove
Chichester Festival Theatre
Churchill Theatre
City of Birmingham Symphony Orchestra
Cockpit
Colston Hall
Congress Theatre
Consett Empire
Courtyard Hereford
Crewe Lyceum
Curve
Darlington Hippodrome
De Montfort Hall
Derby LIVE
Derby Theatre
Diverse City
Dorking Halls
English National Opera
English Touring Opera
Ex Cathedra
Farnham Maltings
Five Star Theatre
Forest Arts Centre
Fuel
Fulham Opera
G Live
Gala
GlassBox Theatre
Grand Pavilion Porthcawl
Guildford Shakespeare Company
Gwyn Hall
Harrogate Theatre
Highlights Rural Touring
HOME Manchester
Hull Truck Theatre
Immersive|LDN
intoBodmin
Jermyn Street Theatre
Kirkgate Arts
Lakeside Arts
Leeds Grand Theatre & Opera House
Leeds Playhouse
Leicester Square Theatre
Lichfield Garrick
Lighthouse, Poole
Little Angel Theatre
Liverpool Everyman and Playhouse
London International Festival of Theatre LIFT
London International Mime Festival
London Mozart Players
London Philharmonic Orchestra
MAC Birmingham
Mayflower Southampton
Museum of Comedy
Music Venue Trust
Nevill Holt Opera
New Theatre Cardiff
New Vic Theatre
New Writing North
Newbury Spring Festival
Newcastle Theatre Royal
Nonsuch Studios
Northern Stage
Nottingham Playhouse
Octagon Theatre Bolton
Off West End
Oldham Coliseum
Opera Holland Park
Opera North
Orchard Theatre
Orchestra of the Swan
Peoples Theatre Arts Group
Philharmonia
Phoenix Theatre
Pontardawe Arts Centre
Red Ladder Theatre Company
Roundhouse
Royal & Derngate
Royal Albert Hall
Sadler's Wells
Saffron Hall
Shakespeare's Globe
Sheffield Doc/Fest
South Holland Centre
Southbank Centre
Southend Theatres
St David's Hall Cardiff
St Martin-in-the-Fields
Stephen Joseph Theatre

Stratford Circus Arts Centre
Strode Theatre
Swansea Grand Theatre
Taliesin Arts Centre
The Albany
The Assembly Hall Theatre
The Capitol Horsham
The Factory of Creativity
CIO (Hope Mill Theatre)
The Hallé
The Lowry
The Met
The Old Vic
The Place
The Place Bedford
The Point, Eastleigh & The Berry Theatre
The Watermill
The Witham
The Woodville
The Y Theatre
Theatre Royal & Royal Concert Hall Nottingham
Theatre Royal Plymouth
Theatre Royal Wakefield
Theatre Royal Winchester (Play to the Crowd)
Theatre Severn
Three Choirs Festival
Universal Hall Promotions
Villages in Action
Warwick Arts Centre
Watford Colosseum
Welsh National Opera
Wessex Glyndebourne Association
West End Centre
White Rock Theatre
Wiltons Music Hall
Wokingham Festival
Wokingham Music Club
Wycombe Swan
Wyvern Theatre
YMCA Theatre, Scarborough
York Theatre Royal
Z-arts

Scottish Opera
Taliesin Arts Centre
The Brunton
The Byre Theatre
The Gaiety Theatre
Traverse Theatre
Tron Theatre
Universal Hall Promotions

N Ireland

Belfast Mela
Eastside Arts Festival
Island Arts
Market Place Theatre Armagh
Open House Festival
Peter Corry Productions
Portico
Smock Alley Theatre
The Alley Arts & Conference Centre
The Courtyard Theatre
The Lyric Theatre
The MAC
The Old Courthouse Theatre
The Strand Arts Centre
Theatre at the Mill

Scotland

Aberdeen Performing Arts
Beacon Arts Centre
Dundee Rep and Scottish Dance Theatre
Eden Court Highlands
Horsecross Arts - Perth Concert Hall and Perth Theatre
Live Life Aberdeenshire
Lyceum Edinburgh
North East Arts Touring
Royal Scottish National Orchestra (RSNO)
Scottish Chamber Orchestra