

*indigo*

## **After the Interval**

### National Audience Research

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*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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# Contents

<b>Context .....</b>	<b>4</b>
<b>Section 1: Methodology and Sample .....</b>	<b>5</b>
Sample breakdown .....	6
<b>Section 2: Overall findings .....</b>	<b>7</b>
2.1 Missing events during lockdown .....	7
2.2 Booking NOW for Events in the future.....	8
2.3 When will audiences return? .....	9
2.4 Safety and Comfort.....	10
2.5 Reassurances around refunds and exchanges.....	11
2.6 Supporting Cultural Charities.....	12
<b>Section 3. Key metrics compared .....</b>	<b>13</b>
3.1 Week by week .....	13
3.2 By organisation type .....	14
3.3 By region .....	14
3.4 By age.....	15
<b>Appendix 1: About Indigo-Ltd.....</b>	<b>16</b>
<b>Appendix 2: Participating Organisations .....</b>	<b>17</b>

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](http://www.indigo-ltd.com)**

## Section 1: Methodology and Sample

Cultural organisations were invited to send an email to a sample of their recent<sup>1</sup> and frequent<sup>2</sup> 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.

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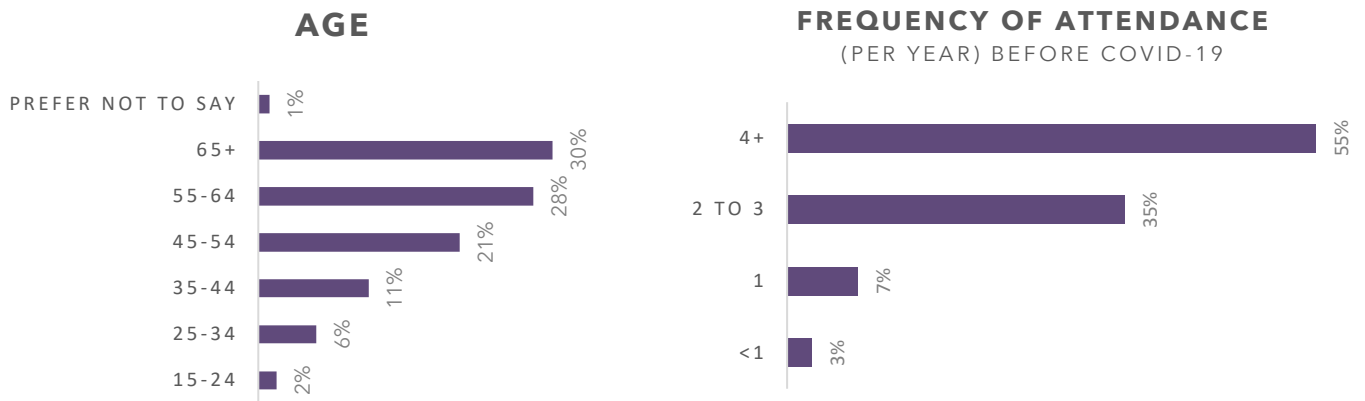
<sup>1</sup> Recent: have attended an event in the last 2 years

<sup>2</sup> 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.

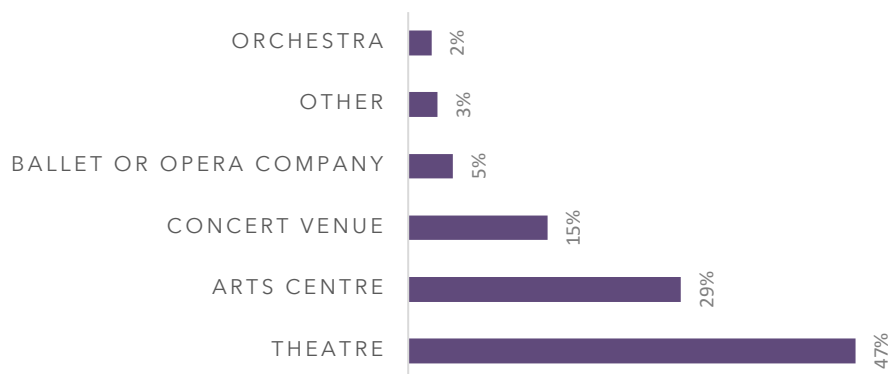


## Responses by region<sup>3</sup>

Region	Percentage
<b>England</b>	<b>78%</b>
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%

<b>Wales</b>	<b>11%</b>
<b>Scotland</b>	<b>8%</b>
<b>Touring</b>	<b>2%</b>
<b>Ireland</b>	<b>1%</b>

## Responses by organisation type



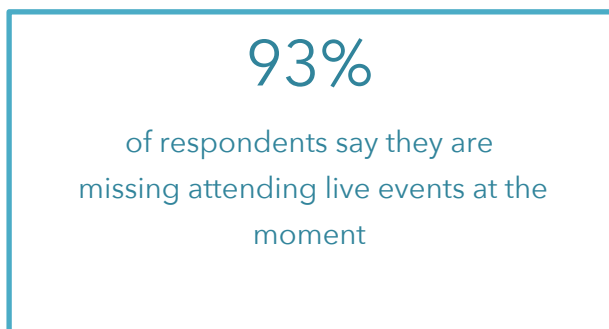
<sup>3</sup> Region = where participating organisation is based and/or primarily operates

## Section 2: Overall findings

### 2.1 Missing events during lockdown

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

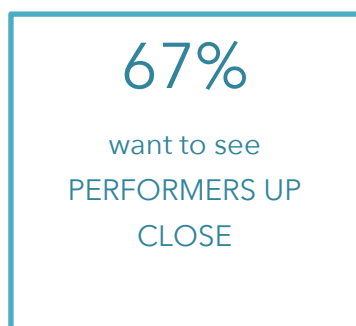
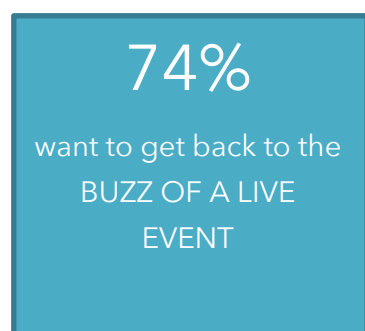
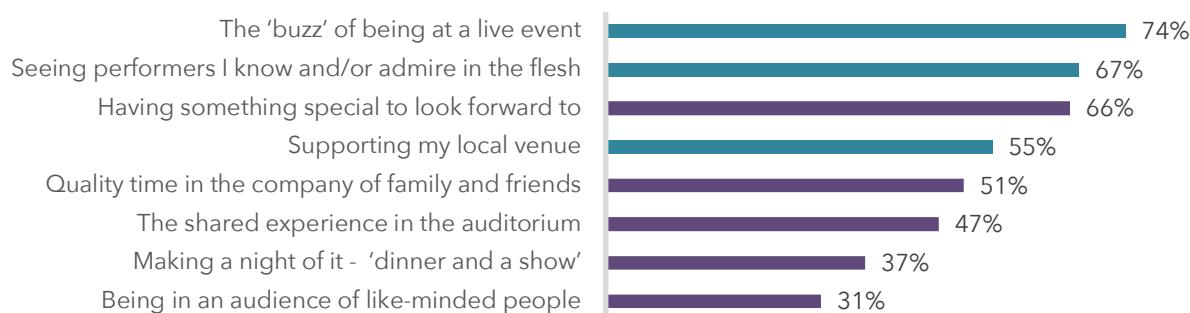
Responses: 86,377



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



## 2.2 Booking NOW for Events in the future

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

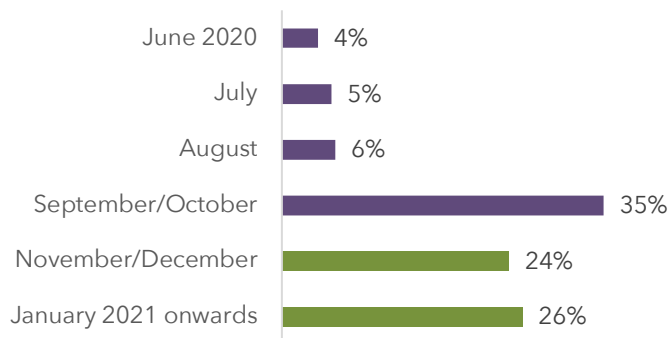
Responses: 84,197

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

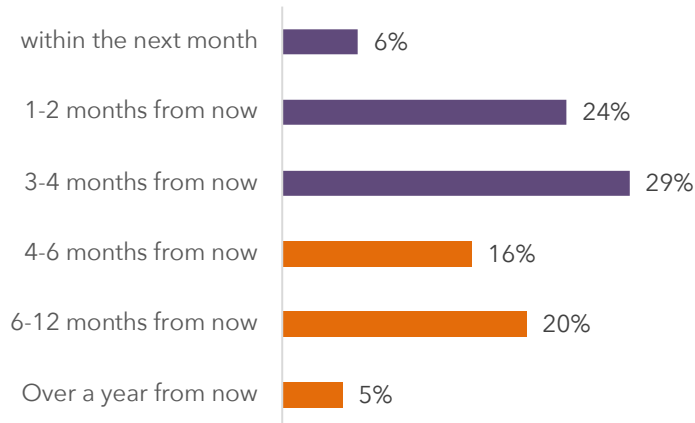


## 2.3 When will audiences return?

**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?

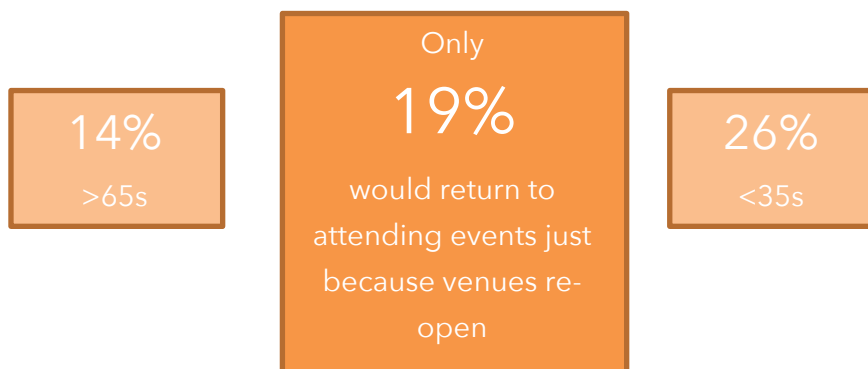
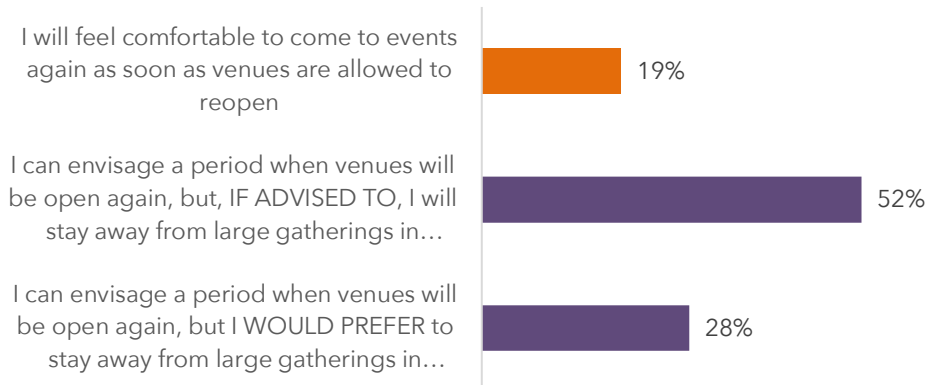
Responses: 68,595

**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



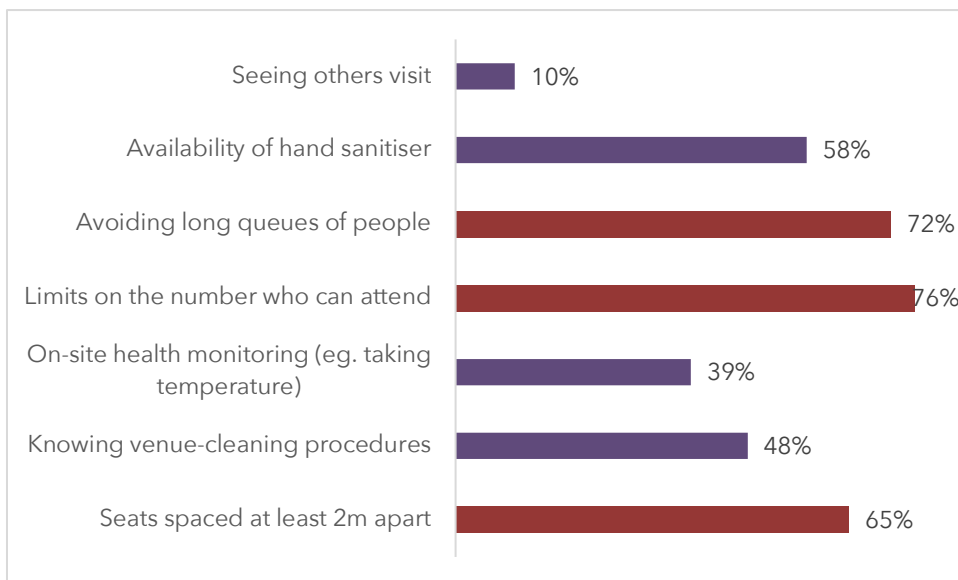
## 2.4 Safety and Comfort

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

Responses: 52,065

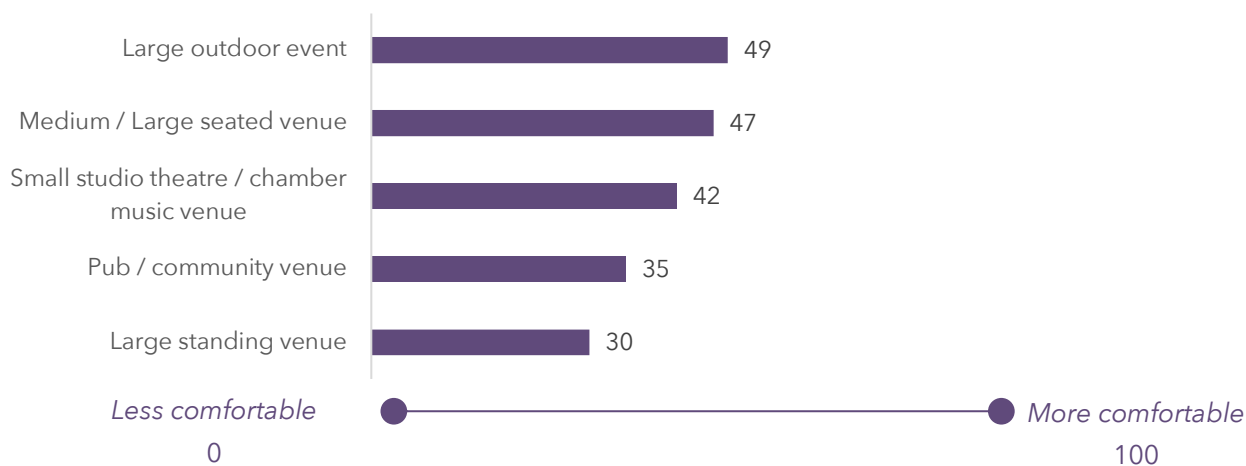
3/4

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



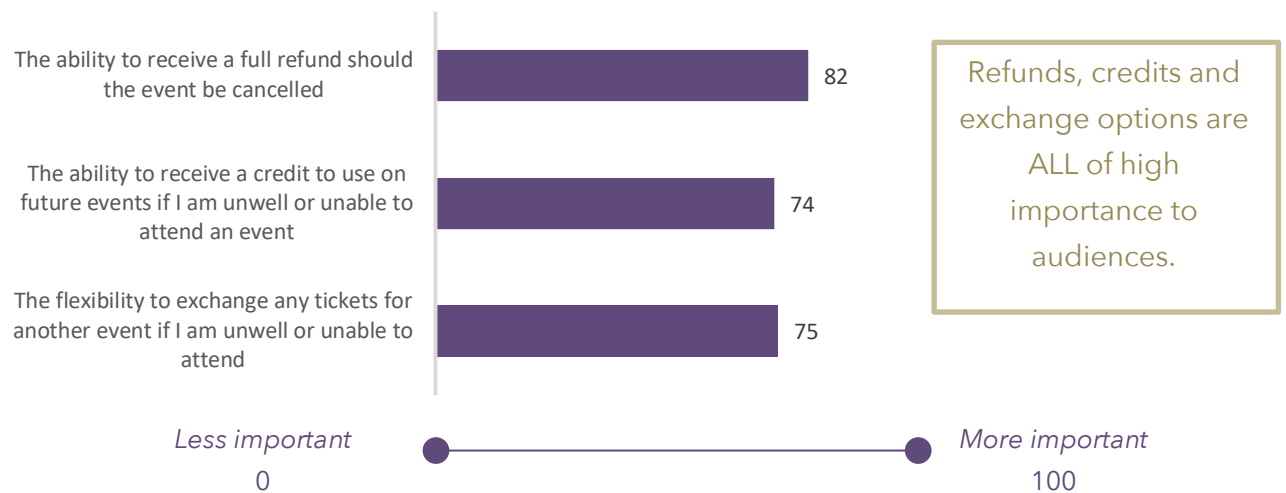
NO type of venue scores highly, but large standing venues are the least attractive

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

## 2.5 Reassurances around refunds and exchanges

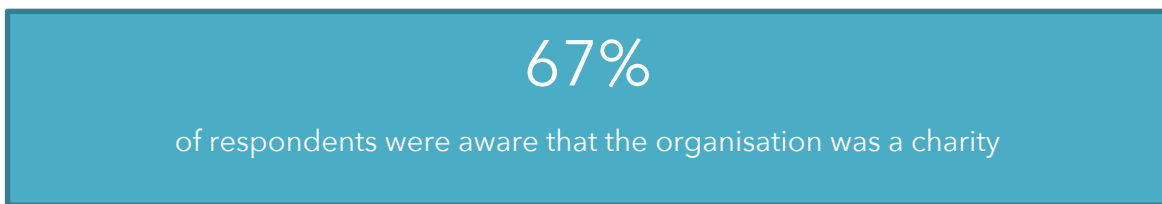
**Q:** Please tell us how important each of the following would be in influencing your decision to book for future events

Responses: 65,638



## 2.6 Supporting Cultural Charities

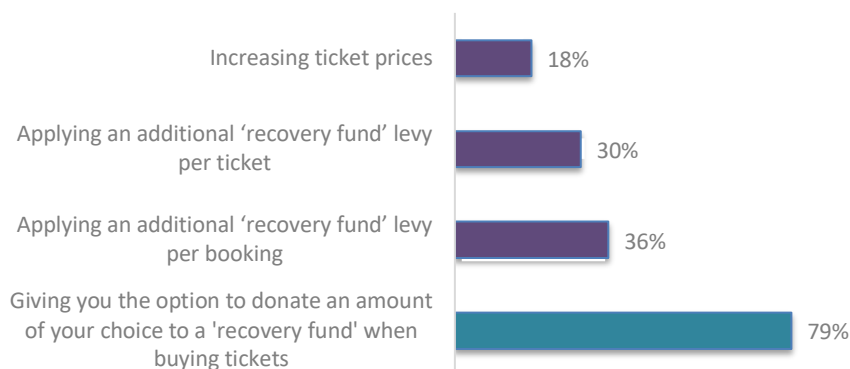
The following questions were only asked on the surveys sent out by Cultural charities.



Responses: 50,232

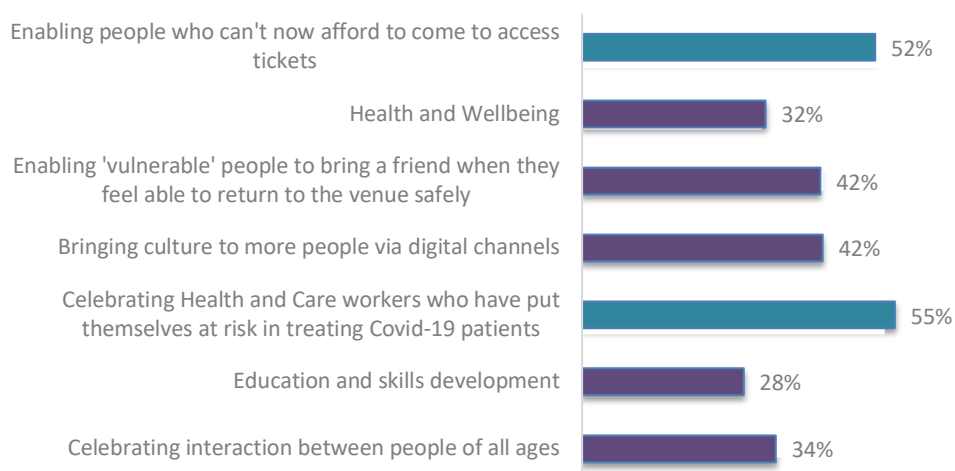
**Q:** When the organisation re-opens, their financial position may be challenging, and so may consider various options to ensure a successful re-opening. Please could you let us know which of these you would feel are most appropriate for cultural charities to consider?

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%

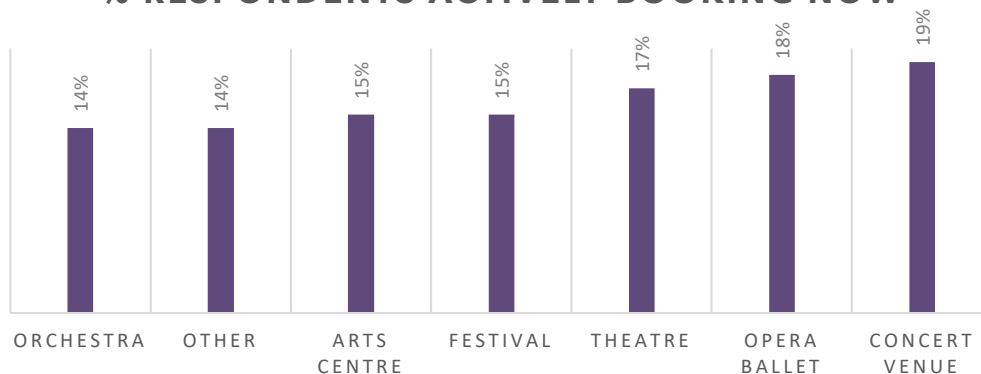
19%

19%

## 3.2 By organisation type

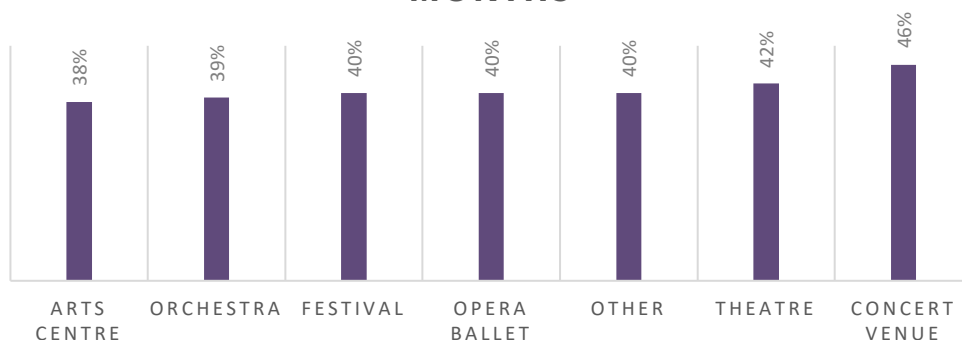
**Orchestras** are the least likely to have respondents booking now

**% RESPONDENTS ACTIVELY BOOKING NOW**



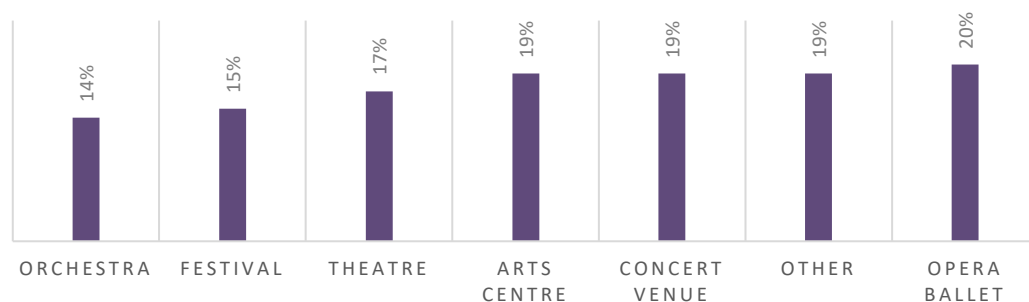
**Concert Venues** and **Theatres** have the highest proportion of respondents who will not consider booking for at least 4 months

**% 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

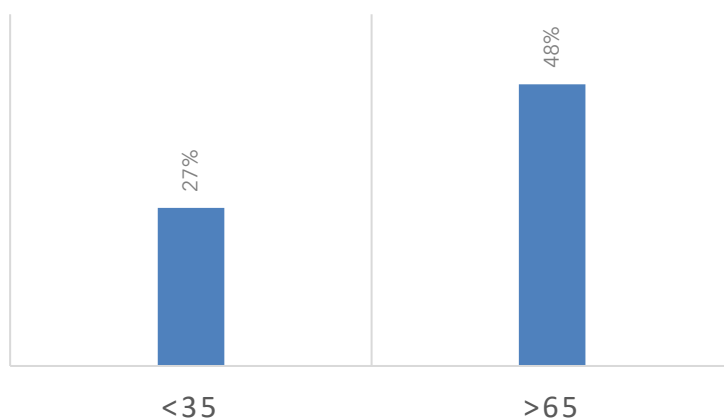
There are currently no significant regional differences in the data but we will continue to monitor this and report further in Wave 2.

### 3.4 By age

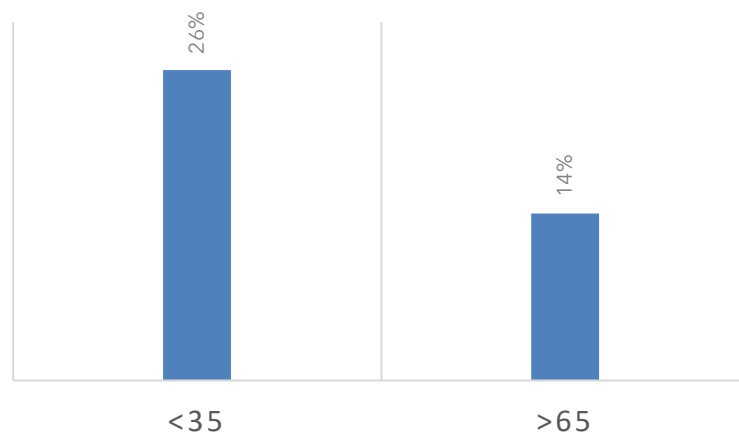
Age plays a significant part in

- 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 1<sup>st</sup>-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

### Ireland (NI and ROI)

Belfast Mela  
Eastside Arts Festival  
Íontas Theatre  
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