



*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 2** | 7-27 May 2020

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137K

Audience responses

317

Organisations

During  
Lockdown

94%

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

74%

want to get back to  
the  
BUZZ OF A LIVE  
EVENT

57%

Look forward to  
SUPPORTING  
their LOCAL  
VENUE

Booking  
NOW for  
events

Only  
16%

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

42%

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.

We previously published an interim report 'wave 1' which covered 3 weeks from 16 April – 6 May. This second report now shows findings for **7-27 May**.

A second survey 'After the Interval: **Act Two**' began on 1 June and will run until 13 July.

**We will continue to publish regular updates and observations on the findings of both surveys, 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 (wave 1) and then 7-27 May (wave 2)

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

Over the 6 week period over **137,000** responses from audience members were received: 86,000 in wave 1 and 51,000 in wave 2.

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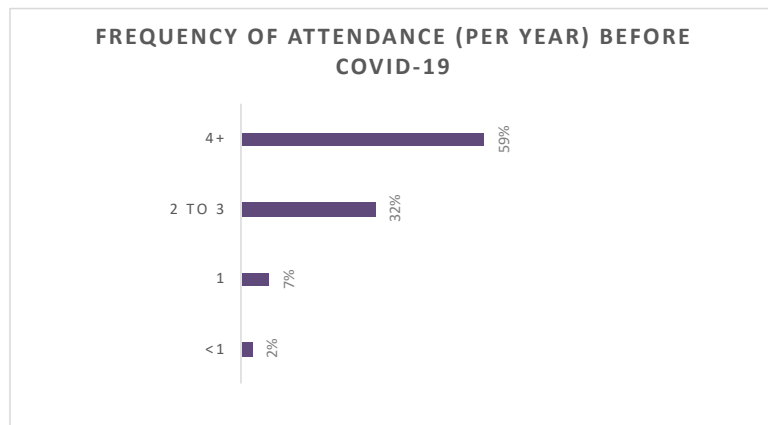
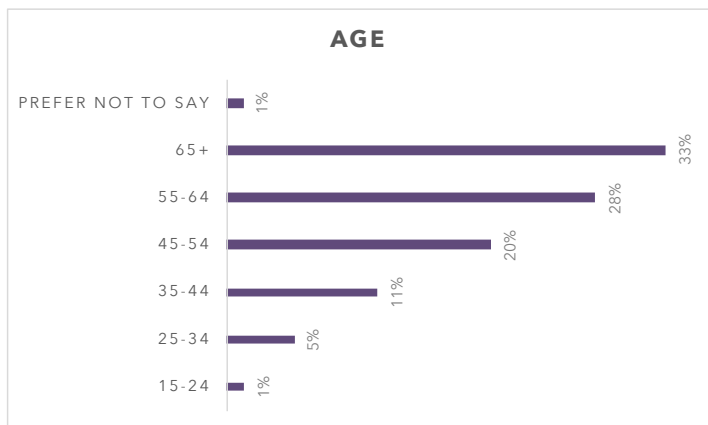
<sup>1</sup> Recent: have attended an event in the last 2 years

<sup>2</sup> Frequent: have attended more than once

## Sample breakdown

### Responses: 50,650 (wave 2)

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.

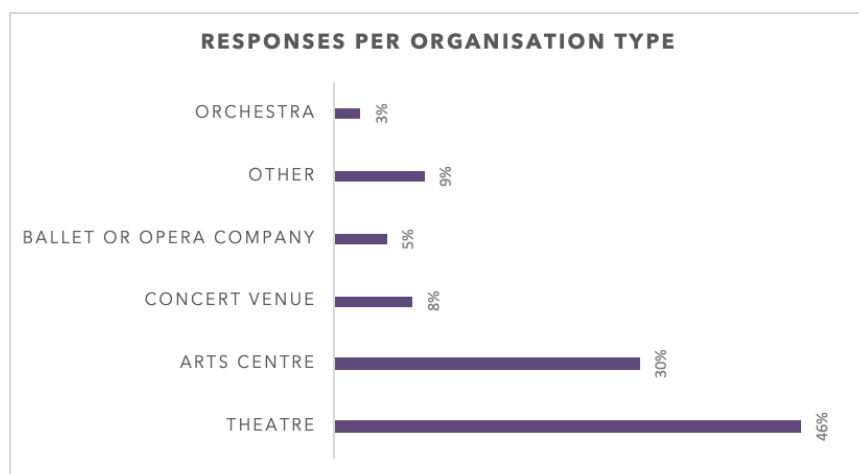


### Responses by region/country<sup>3</sup>

England	74%
East Midlands	7%
East	10%
London	9%
West Midlands	3%
North East	5%
North	6%
North West	14%
South East	5%
South West	6%
South	9%

Wales	8%
Scotland	10%
Touring	2%
Ireland: ROI and NI	6%

### 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: 50,523

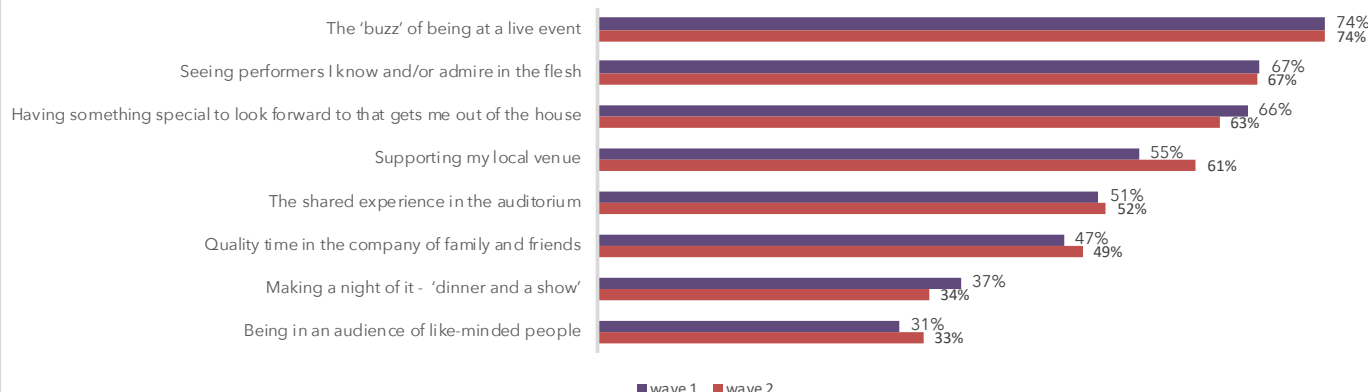
94%

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

	Wave 1	Wave 2
Yes - a lot	<b>60%</b>	<b>62%</b>
Somewhat	33%	32%
Not really	6%	6%
Not at all	1%	1%

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

Responses: 46,360



74%

want to get back to the  
BUZZ OF A LIVE  
EVENT

67%

want to see  
PERFORMERS UP  
CLOSE

61%

want to SUPPORT their  
LOCAL VENUE\*

\*This is significantly higher  
than the 55% in wave 1

## 2.2 Booking NOW for Events in the future

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

Responses: 49,207

Only  
**15%**

of respondents are booking for events

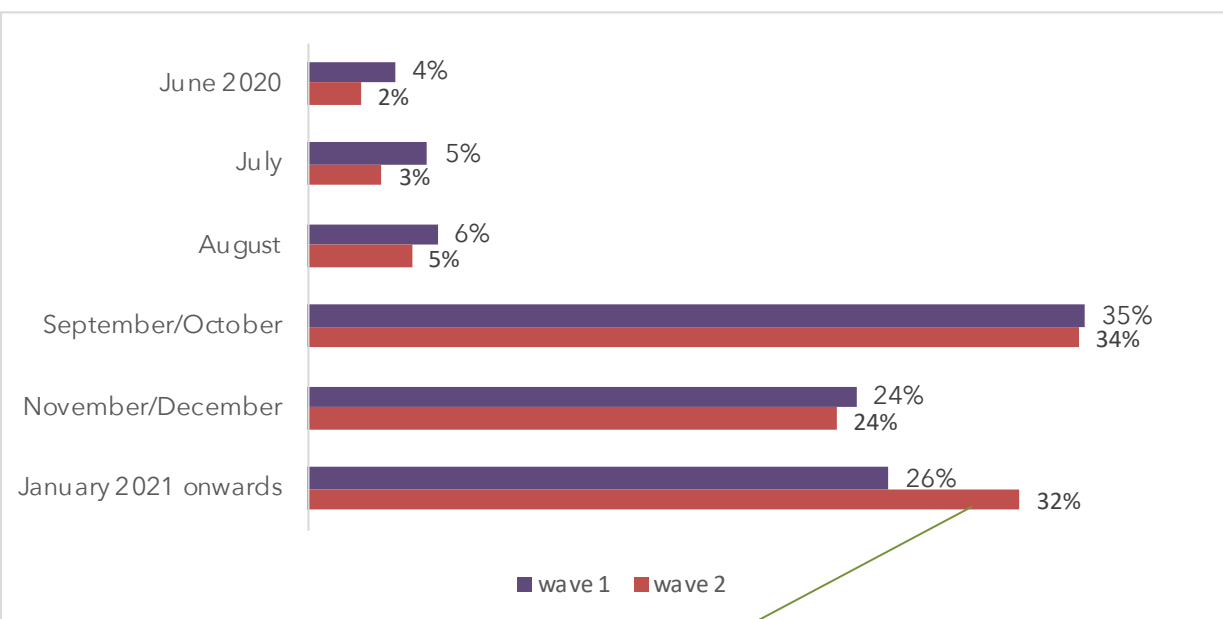
	Wave 1	Wave 2
Yes	<b>17%</b>	<b>15%</b>
No	83%	85%

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

Responses: 7,170

Half

of those booking are for events from  
NOVEMBER



Significant **INCREASE**  
In those only booking events from  
**JANUARY 2021** onwards

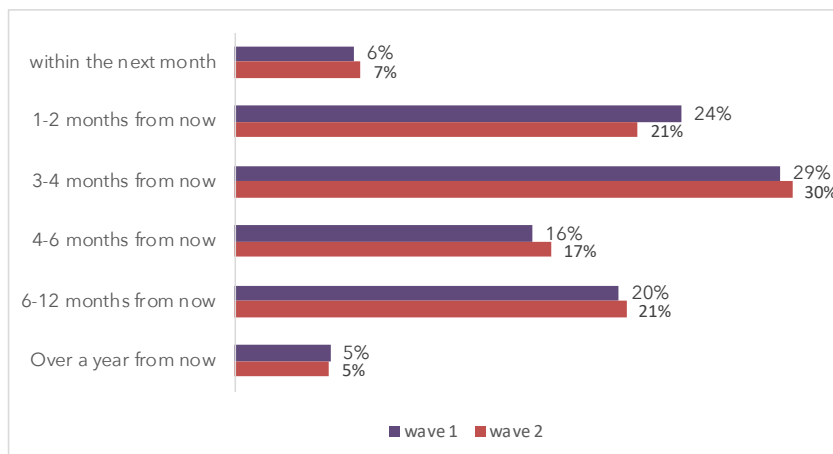


## 2.3 When will audiences return?

**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?

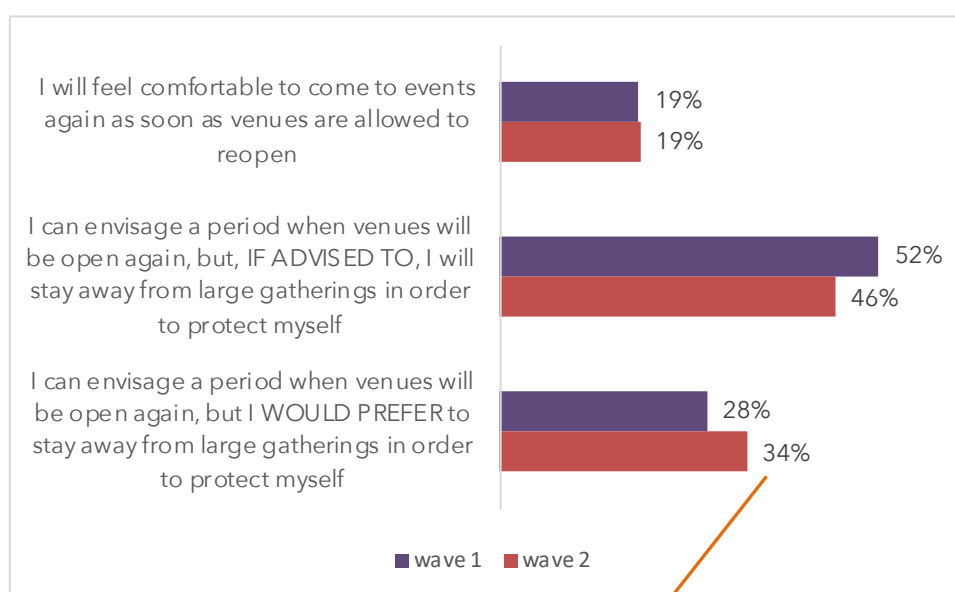
Responses: 41,129

**42%**  
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: 41,452



Only  
**19%**  
would return to  
attending events just  
because venues re-  
open

Significant  
**INCREASE** in  
those wanting to  
**STAY AWAY**  
from large gatherings

## 2.4 Safety and Comfort

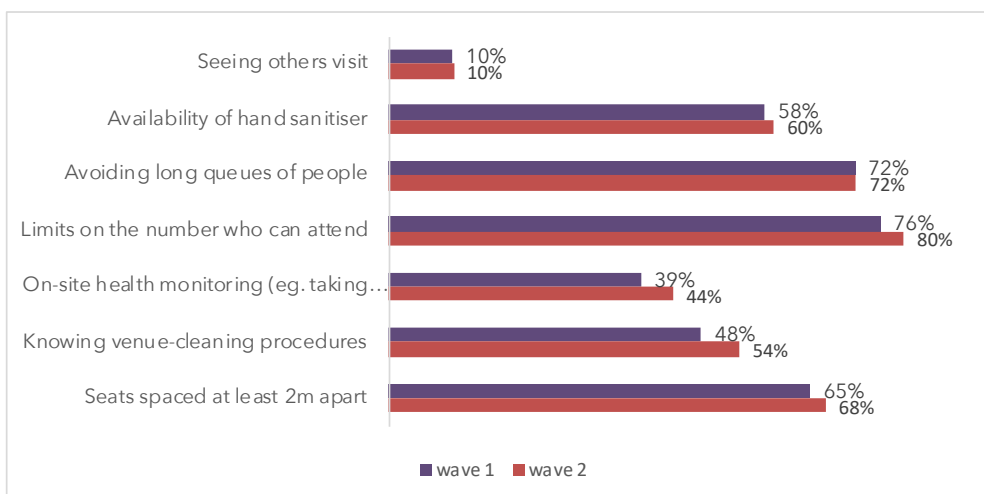
**Q:** Would any of the following help you to feel safe and comfortable going to an event at a venue again?

Responses: 31,623

80%

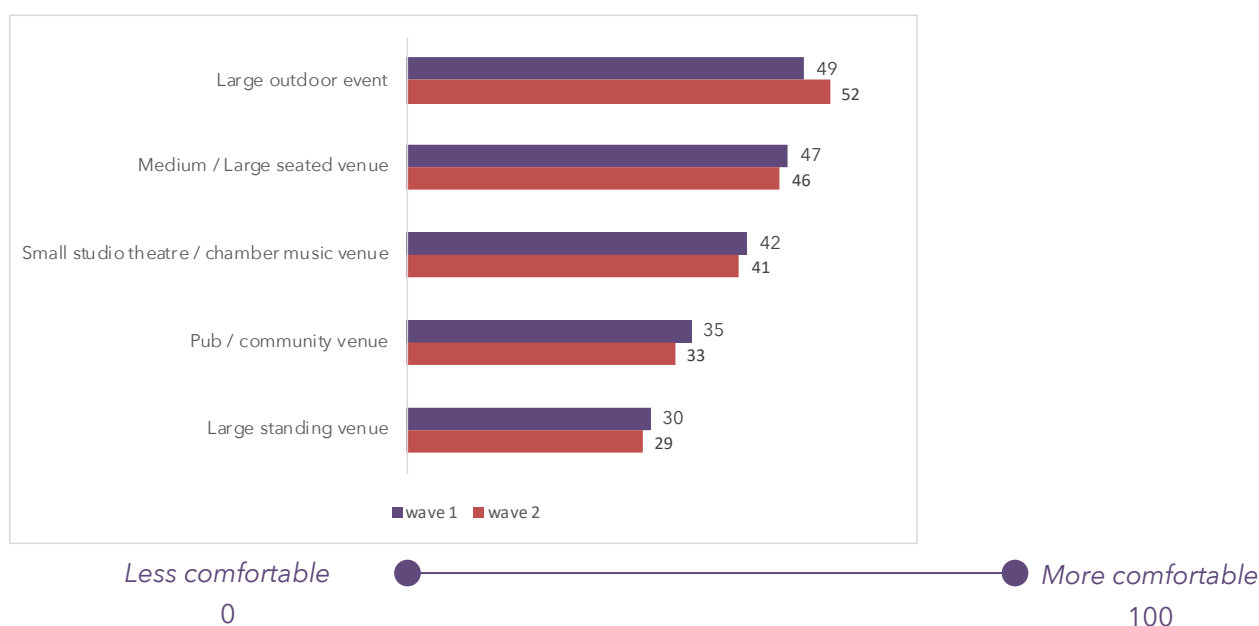
Would feel safer with  
some form of social  
distancing measures

Significant  
**INCREASE** in social  
distancing requirements



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

Responses: 38,306

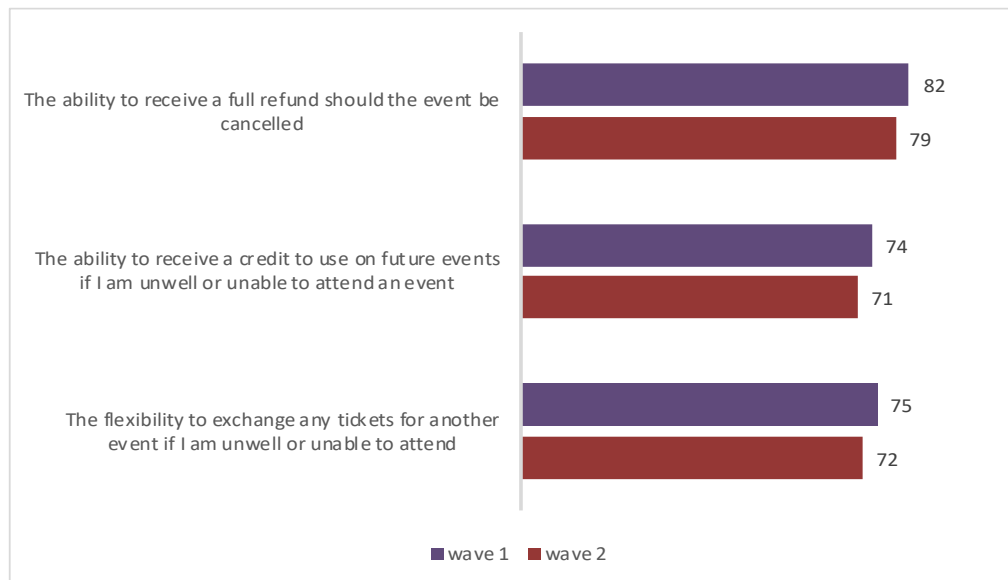


**LARGE OUTDOOR EVENTS**  
have become more attractive in wave 2

## 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: 39,137



Refunds, credits and exchange options are ALL of high importance to audiences.

## 2.6 Supporting Cultural Charities

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

67%

of respondents were aware that the organisation was a charity

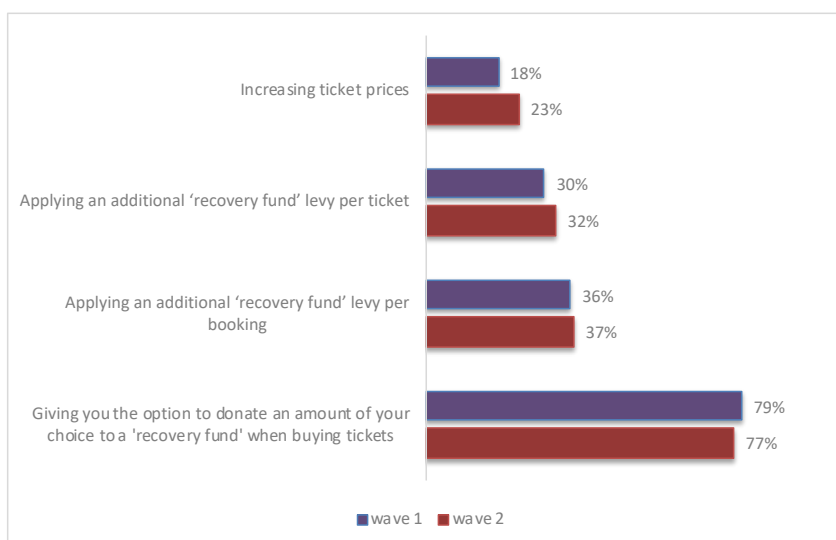
Responses: 34,864

**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: 33,293

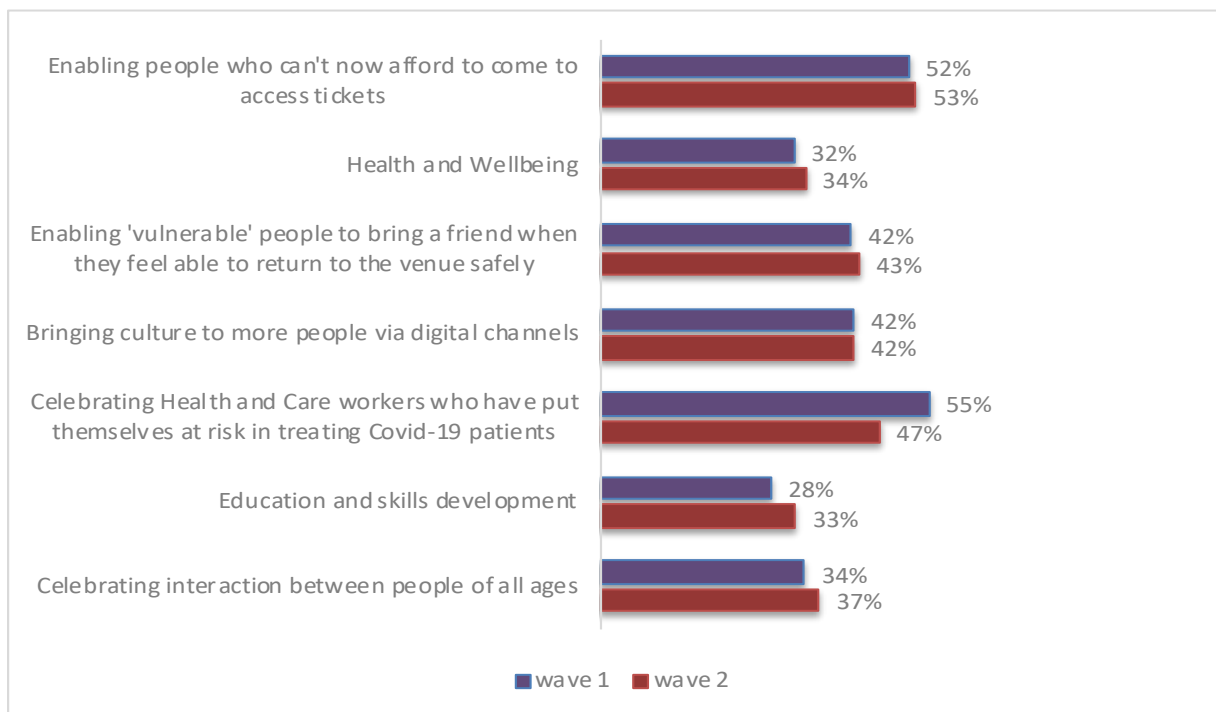
77%

Would support a  
voluntary  
donation at point  
of sale



**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



Further analysis by date, region and organization type is available via our interactive dashboard. For more information visit [www.indigo-ltd.com](http://www.indigo-ltd.com)

COMING SOON  
After the Interval: **Act Two**  
Results available late June 2020

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## 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

a space arts	Theatre	Harrogate International Festivals	Mercury Theatre Colchester
ADC Theatre	Churchill Theatre	Harrogate Theatre	MGSO4 Epsom and Ewell Arts Festival
Alarum Productions	City of Birmingham Symphony Orchestra	Haverhill Arts Centre	Middlesbrough Theatre
Alnwick Playhouse	Clonter Opera Theatre	Hertford Theatre	Middlesbrough Town Hall
Anvil Arts	Cockpit	Highlights Rural Touring	Museum of Comedy
APEX Bury St Edmunds	Colston Hall	HOME Manchester	Music Venue Trust
Arcola	Consett Empire	Hull Theatres	Nevill Holt Opera
Arts at the Old Fire Station	Cornerstone	Hull Truck Theatre	New Theatre Royal Portsmouth
Arts Centre Washington	Courtyard Hereford	Immersive LDN	New Vic Theatre
Artsadmin	Cousin Jack's Theatre Company	intoBodmin	New Writing North
artsdepot	Cranleigh Arts	Ipswich Regent Theatre	Newbury Spring Festival
Ashgate Heritage Arts	Crewe Lyceum	Jermyn Street Theatre	Newcastle Theatre Royal
CIC	Criterion Theatre	King George's Hall	Nonsuch Studios
Babylon ARTS	Curve	Kirkgate Arts	Northern Broadsides Theatre Company
Barbican	DanceEast	Lakeside Arts	Northern Chamber Orchestra
Ashcroft Arts Centre	DanceGRiST	Leeds Grand Theatre & Opera House	Northern Stage
Bath Box Office	Darlington Hippodrome	Leeds International Concert Season	Nottingham Playhouse
BBC Philharmonic	Darwen Library Theatre	Leeds Playhouse	Nuffield Southampton Theatres
Beck Theatre	De Montfort Hall	Leeds Town Hall	Octagon Theatre Bolton
Belgrade Theatre	Derby LIVE	Leicester Square Theatre	Off West End
Birmingham	Derby Theatre	Lichfield Garrick	Oldham Coliseum
Contemporary Music Group	Diverse City	Lighthouse, Poole's Centre for the Arts	Opera Holland Park
Birmingham	Dorking Halls	Lincoln Performing Arts Centre	Opera North
Hippodrome	EM Forster Theatre	Little Angel Theatre	Orchard Theatre
Birmingham Rep	English Folk Expo	Liverpool Everyman and Playhouse	Orchestra of the Swan
Birmingham Royal Ballet	English National Ballet	London International Festival of Theatre LIFT	Oxford Playhouse
Bishop Auckland Town Hall	English National Opera	London International Mime Festival	Palace Theatre Paignton
Blackfriars Theatre and Arts Centre	English Touring Opera	London Mozart Players	Pegasus Theatre
Blackpool Grand Theatre	Ex Cathedra	London Philharmonic Orchestra	Penlee Park Open Air Theatre
Bradford Theatres	Exeter Northcott Theatre	London Short Film Festival	Peoples Theatre Arts Group
Brewery Arts	Family Arts Campaign	London Symphony Orchestra	Philharmonia
Bridgewater Hall	Farnham Maltings	Long Division	Phoenix Theatre
Brighton Dome and Brighton Festival	Festival of Ideas	MAC Birmingham	Pocklington Arts Centre
Bristol Old Vic	Five Star Theatre	Manchester Chamber Concerts Society	Prism Arts
British Youth Music Theatre	Forest Arts Centre	Manchester International Festival	Proteus
Britten Sinfonia	Forest Forge Theatre	Mayflower Southampton	Queen's Hall Arts, Hexham
Camberley Theatre	Fringe TheatreFest	MAYK	Red Ladder Theatre Company
Cambridge Live	Fuel		Regent Centre Christchurch
Camden People's Theatre	Fulham Opera		
Carn to Cove	G Live		
Carriageworks Theatre	Gala		
Chichester Festival	GlassBox Theatre		
	Guildford Shakespeare Company		
	Gulbenkian, University of Kent		
	Hanger Farm Arts Centre		
	Harlow Playhouse		

Ribble Valley International Piano Week Rich Mix Rose Theatre Roses Theatre, Tewkesbury Roundhouse Royal & Derngate Royal Albert Hall Royal Opera House Sadler's Wells Saffron Hall Shakespeare's Globe Sheffield Doc/Fest Sheffield Theatres South Holland Centre Southbank Centre Southend Theatres Southwell Music Festival Spot On Lancashire St Martin-in-the-Fields Stephen Joseph Theatre Starts Arts Centre Stoller Hall Stratford Circus Arts Centre Strode Theatre Take Art Tête à Tête The Albany The Albany Theatre The Assembly Hall Theatre The Atkinson The Capitol Horsham The Factory of Creativity CIO (Hope Mill Theatre) The Guildhall Trust The Hallé The HandleBards The Horton The Lamproom Theatre The Lord Chamberlain's Men The Lowry The Magna Vitae Embassy Theatre The Maltings The Manchester Lit and Phil The Met	The North Wall The Old Market The Old Town Hall The Old Vic The Opera Story The Place The Place Bedford The Point, Eastleigh & The Berry Theatre The Quarry Theatre The Watermill The Witham The Woodville The Y Theatre Theatr Iolo Theatre Royal & Royal Concert Hall Nottingham Theatre Royal Bury St Edmunds Theatre Royal Plymouth Theatre Royal Wakefield Theatre Royal Winchester (Play to the Crowd) Theatre Severn Three Choirs Festival Town Hall Symphony Hall Trebah Amphitheatre Ulverston Coronation Hall Victoria Theatre Halifax Villages in Action Warwick Arts Centre Watford Colosseum Welsh National Opera Wessex Glyndebourne Association West End Centre White Rock Theatre Wiltens Music Hall Wiltshire Creative Wiltshire Music Centre Wise Children Wokingham Festival Wokingham Music Club Wycombe Swan Wyvern Theatre YMCA Theatre, Scarborough York Theatre Royal	Z-arts  <b>Wales</b> Blackwood Miners' Institute Canolfan y Celfyddydau Aberystwyth Arts Centre Carmarthenshire Theatres Congress Theatre Grand Pavilion Porthcawl Gwyn Hall Hijinx New Theatre Cardiff NoFit State Circus Pontardawe Arts Centre Royal Welsh College of Music & Drama St David's Hall Cardiff Swansea Grand Theatre Theatr Clwyd  <b>Scotland</b> Aberdeen Performing Arts Beacon Arts Centre Capital Theatres CatStrand Citizens Theatre Dundee Rep and Scottish Dance Theatre Eden Court Highlands Horsecross Arts - Perth Concert Hall and Perth Theatre Live Life Aberdeenshire Lyceum Edinburgh Lyth Arts Centre Macrobert Arts Centre National Theatre of Scotland North East Arts Touring OnFife Rapture Theatre Royal Conservatoire of Scotland Royal Scottish National Orchestra (RSNO) Scottish Chamber Orchestra Scottish Opera Taliesin Arts Centre	the Barn The Brunton The Byre Theatre The Gaiety Theatre Traverse Theatre Tron Theatre Universal Hall Promotions Usher Hall  <b>Ireland (NI and ROI)</b> Accidental Theatre Ards Arts Centre Belfast Mela Belfast Philharmonic Society City of Derry International Choir Festival Craic Theatre Cultúrlann Mc Adam Ó Fiaich Eastside Arts Festival Glasgowbury Íontas Theatre Island Arts Market Place Theatre Armagh Millennium Forum Open House Festival Peter Corry Productions Portico Smock Alley Theatre Terra Nova Productions The Alley Arts & Conference Centre The Courtyard Theatre The Dock The Everyman The lyric Theatre The MAC The Old Courthouse Theatre The Strand Arts Centre Theatre at the Mill Waterfront Hall and Ulster Hall Young at Art
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