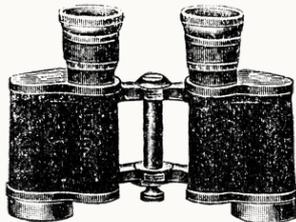




indigo

Family Audiences

from: Act 2
National Audience Survey
July 2020



indigo-ltd.com
familyarts.co.uk

Act 2 overview

258

participating
organisations

103k

audience
responses

2,449

respondents selected
Family or children's work
as their principal artform
interest

2.5%

of total responses

Act 2 overview

Respondents were asked questions in the following key areas:

Booking
now for
events

Returning
to events

Safety and
comfort

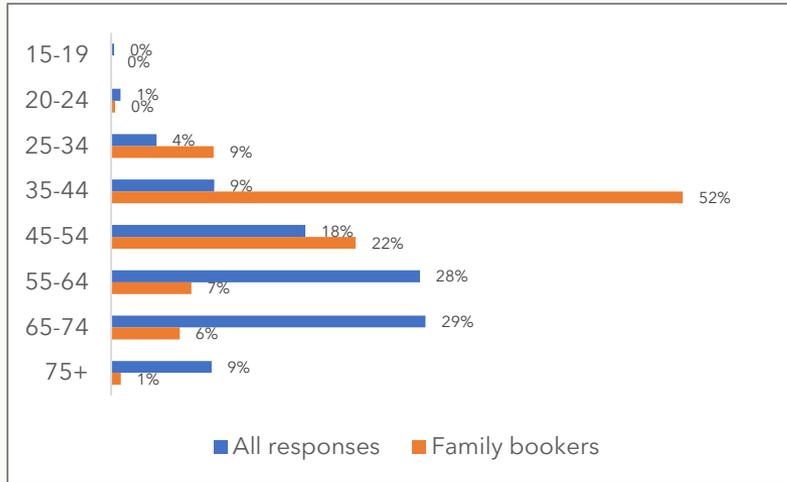
Digital
culture

Outdoor
culture

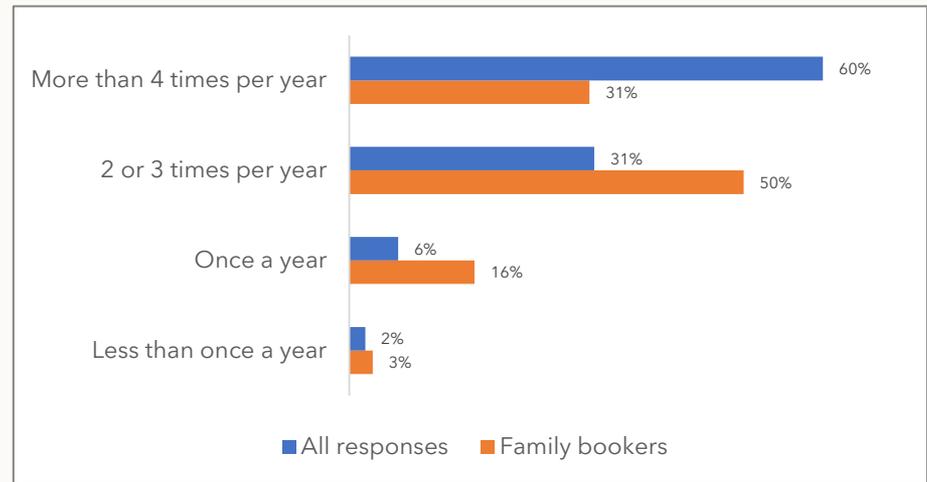
Economic
viability

Demographics of Family bookers

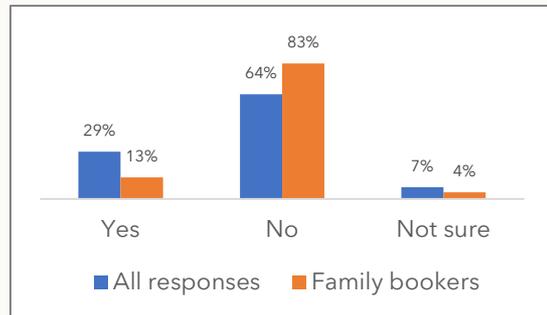
Age



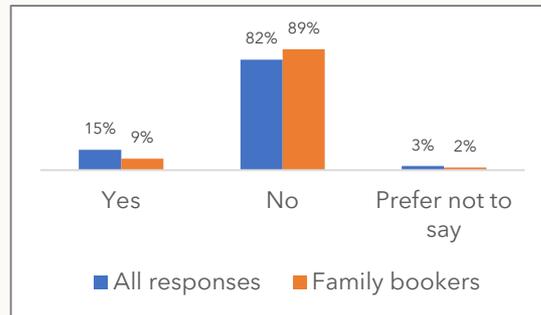
Frequency of attendance



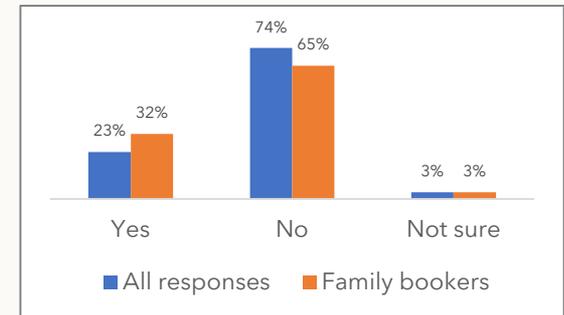
Vulnerability to Covid-19



D/deaf or disability



Income reduction due to Covid-19



Act 2

Booking now for events

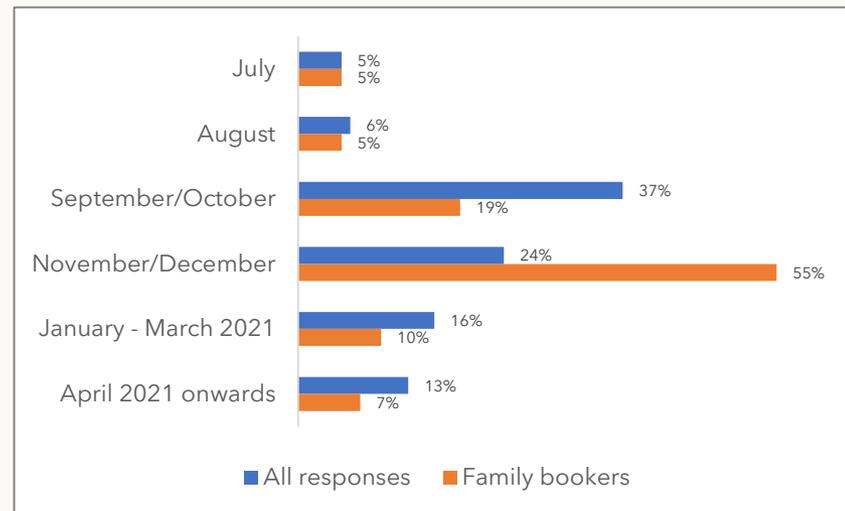
Q: Are you actively booking NOW for events in the future?

Q: When is the first event that you are booking for scheduled to take place?

19%

of Family bookers are booking NOW for events in the future

This figure is **18%** for general responses



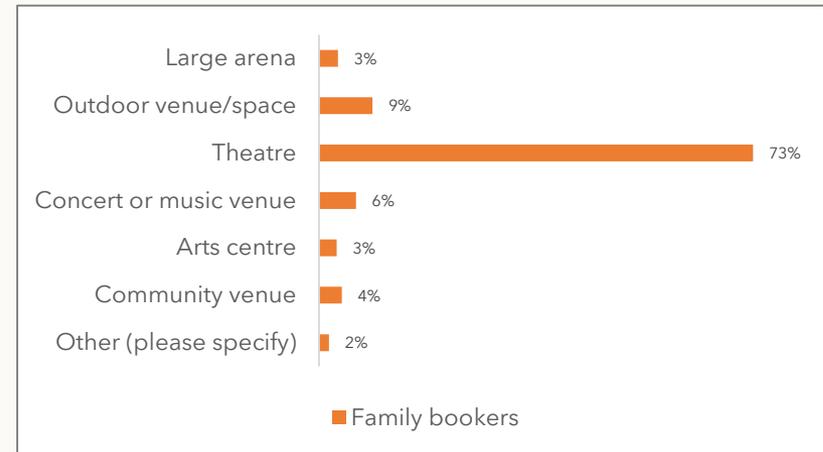
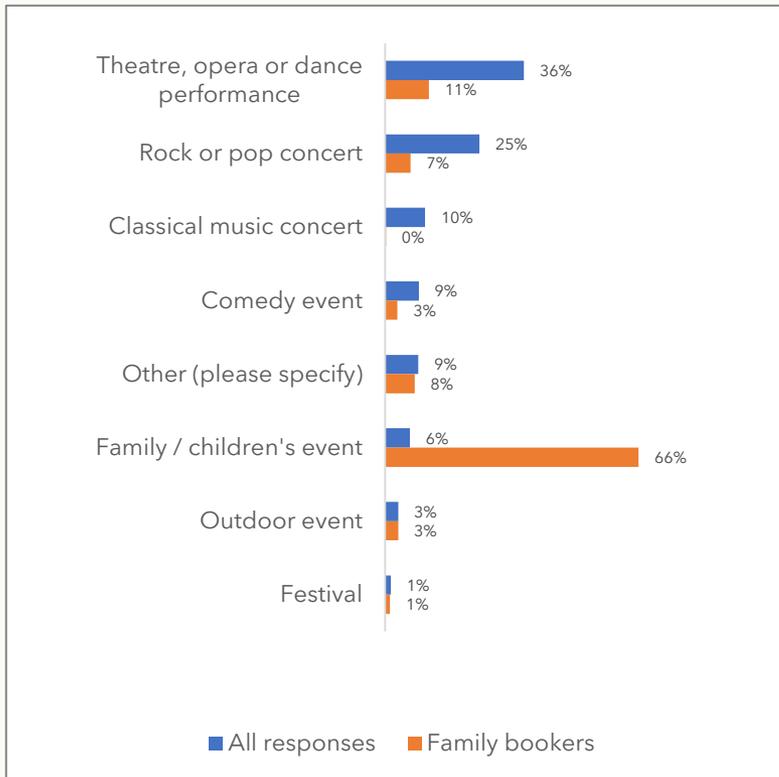
Family bookers are **much more likely** to be booking for events taking place in November or December.

Booking now for events

Q: Which of the following best describes the type of event it is?

Act 2

Q: Which of the following best describes the type of venue where the event will be held?

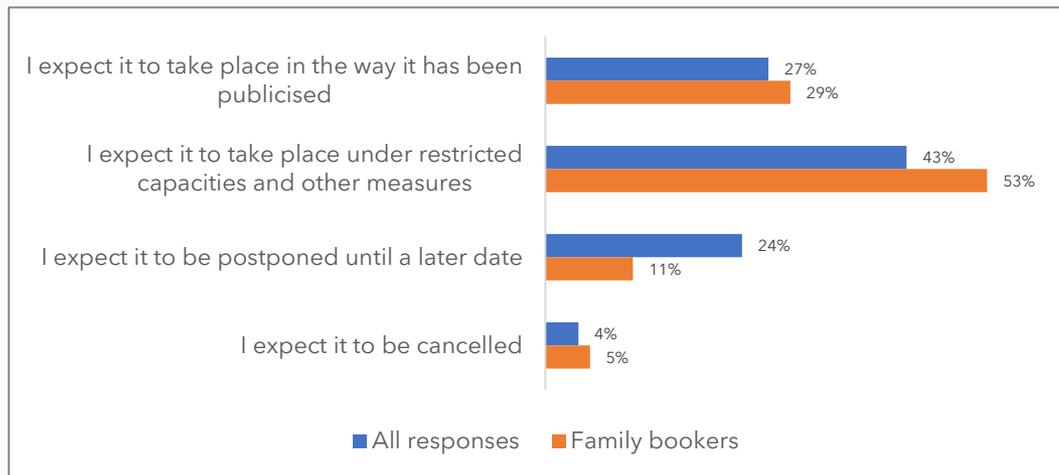


They are booking for **family events** scheduled to take place generally in **theatres**

Booking
now for
events

Q: What is your current expectation regarding this event?

Act 2



Family bookers do not expect the event they have booked for to be postponed - perhaps because it is a **seasonal event**

Over
50%
expect some
restrictions

Only
11%
expect events to
be postponed

Booking
now for
events

Family bookers comments

Act 2

"Visiting the theatre at Christmas has become a part of **our family tradition**. It would be a shame to lose it."

"We'll be **so disappointed** if we can't bring the children to the pantomime at Christmas - it's likely they won't be able to come as a school again and **it's a highlight of our Christmas**."

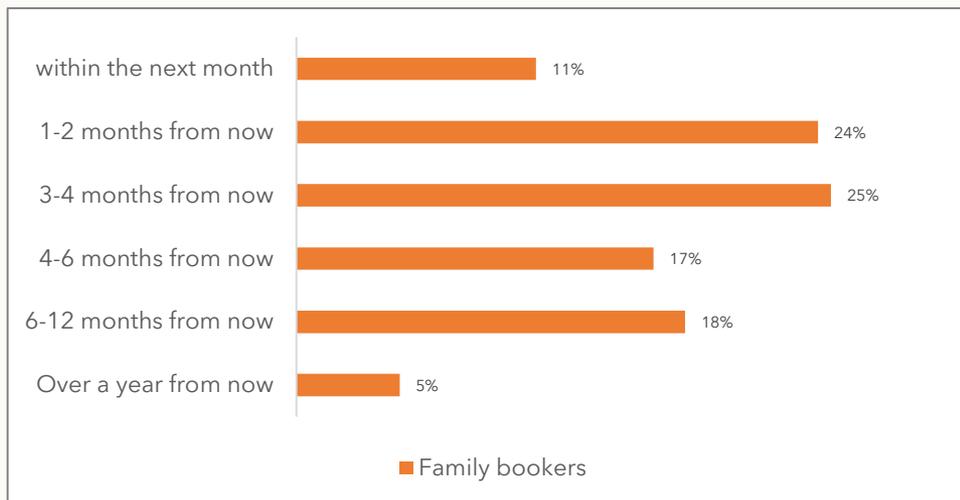
"I am **really hoping** the Christmas show will go ahead this year."

"I've booked for the pantomime for 10 of my family our annual treat but one of our group is vulnerable and then there's the older members to consider. So **unless we are going to be safe** from infection the show must be **cancelled**."

Act 2

Booking now for events

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?



65%
would not book for
at least 3 months

This is similar to the overall response (69%)

Returning to events

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



ONLY

16%

would return to attending events just because venues re-open

BUT

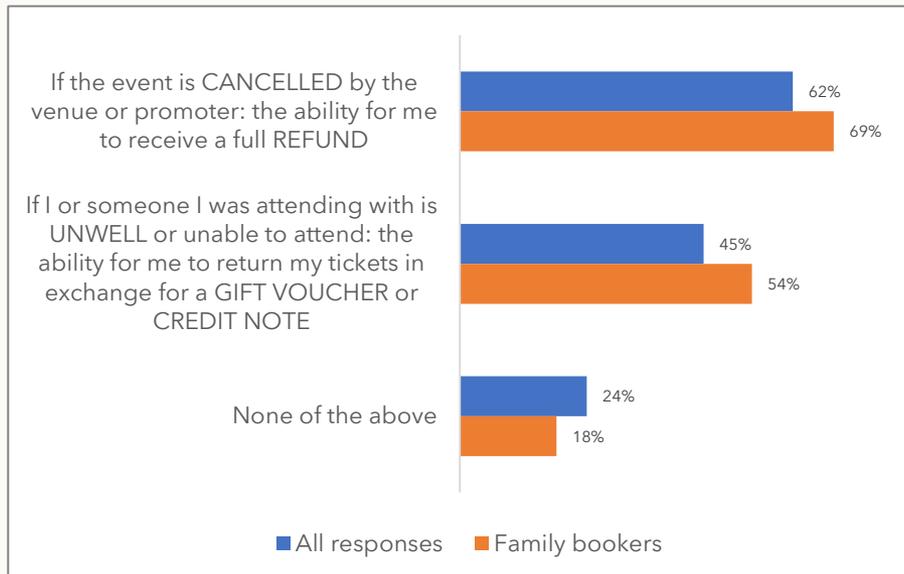
67%

would consider attending if venues reopened with social distancing

These are similar to the figures of overall respondents (15% and 66%)

Returning to events

Q: Would any of the following make you more likely to book NOW for events in the future?



Family bookers are **more likely** to book if:

- a **refund** would be available if the event was cancelled
- a **credit note** would be available if they could no longer attend

Safety and comfort

Q: Would the following social distancing measures make you MORE or LESS likely to consider attending a live cultural event?

Act 2

Responses for each of the measures were put on a scale of -1 (much less likely) to +1 (much more likely). There were a number of variances in the Family booker data:

Performance	Family bookers were more likely (0.0 compared to -0.1) to consider attending daytime performances Having the ability to buy tickets as a household was even more important (0.9 compared to 0.7)
Hygiene	No major variances - restrictions on toilet facilities made Family bookers slightly less likely to consider attending (-0.3 compared to -0.2)
Avoiding contact	Family bookers were less comfortable with all audience members being required to wear masks (0.0 compared to 0.2) Family bookers were slightly less keen to see on site health monitoring e.g. temperature taking (0.3 compared to 0.4)

Safety and
comfort

Family Booker comments

Act 2

“With children the main issue is access to **toilets** and using **public transport** to get to the venue.”

“I often attend this venue with my children so making sure **toilets** are available is important!”

“We mostly attend family events with our young children who **don't really understand social distancing**. It would be fairly difficult and stressful.”

“**Masked events would not work** for the children who are at the start of their theatre experiences.”

“The current system of social distancing and people following you around cleaning is **very stressful** and therefore I would prefer to wait until the situation settles down rather than having to either **subject myself or my child** to all of this.”

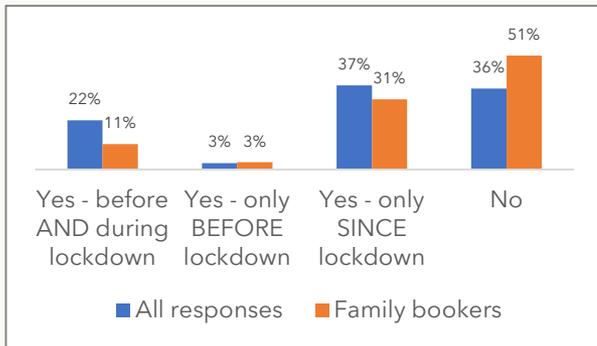
“**Keeping them in a seat** is hard enough work at the best of times!”

Digital culture

Act 2

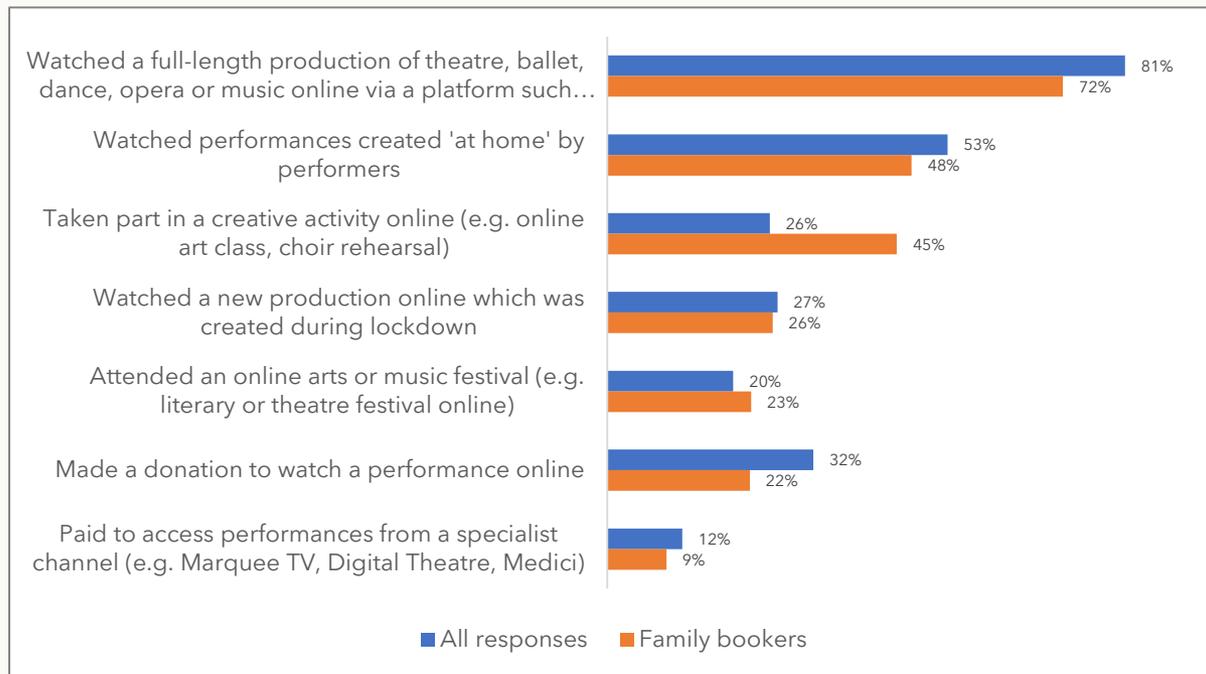
Q: Have you engaged with any cultural events ONLINE, either before or during the recent lockdown?

Q: Which of the following types of online activity have you done during lockdown?



LESS THAN
1/2
have experienced culture online

This is lower than the general response which was **62%**

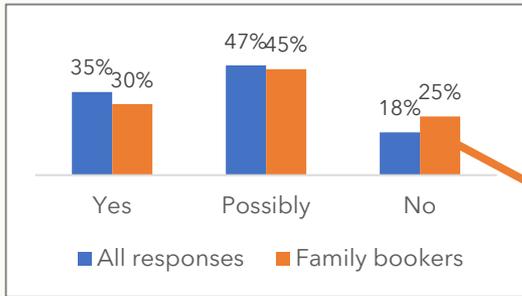


Family bookers are **less likely** to have watched a full-length production or made a donation, but **more likely** to have taken part in a creative activity online

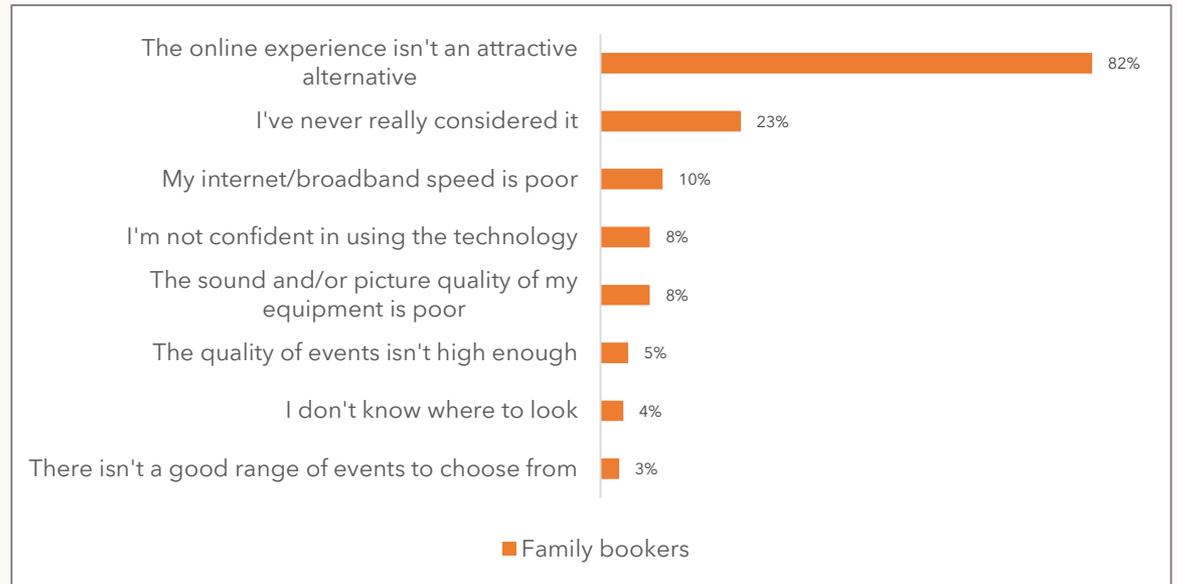
Digital culture

Q: If you were unable to go to cultural events in a venue for the foreseeable future, would you be interested in engaging with cultural events ONLINE?

Act 2



Q: Which of the following reasons explains why you are NOT interested in engaging with cultural events online or digitally?



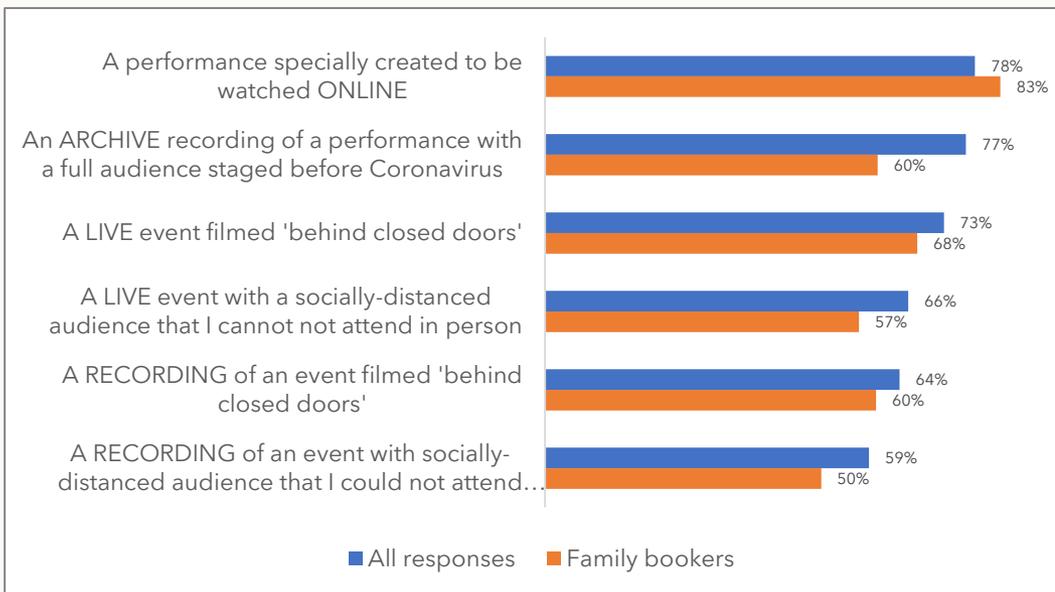
75%
are interested in culture online

Digital culture

Q: Which of the following might you be interested in engaging with online in the future?

Act 2

Q: To what extent do you agree with the following statements regarding your expectations for online events?



Family bookers are MORE INTERESTED in performances specially created to be watched online

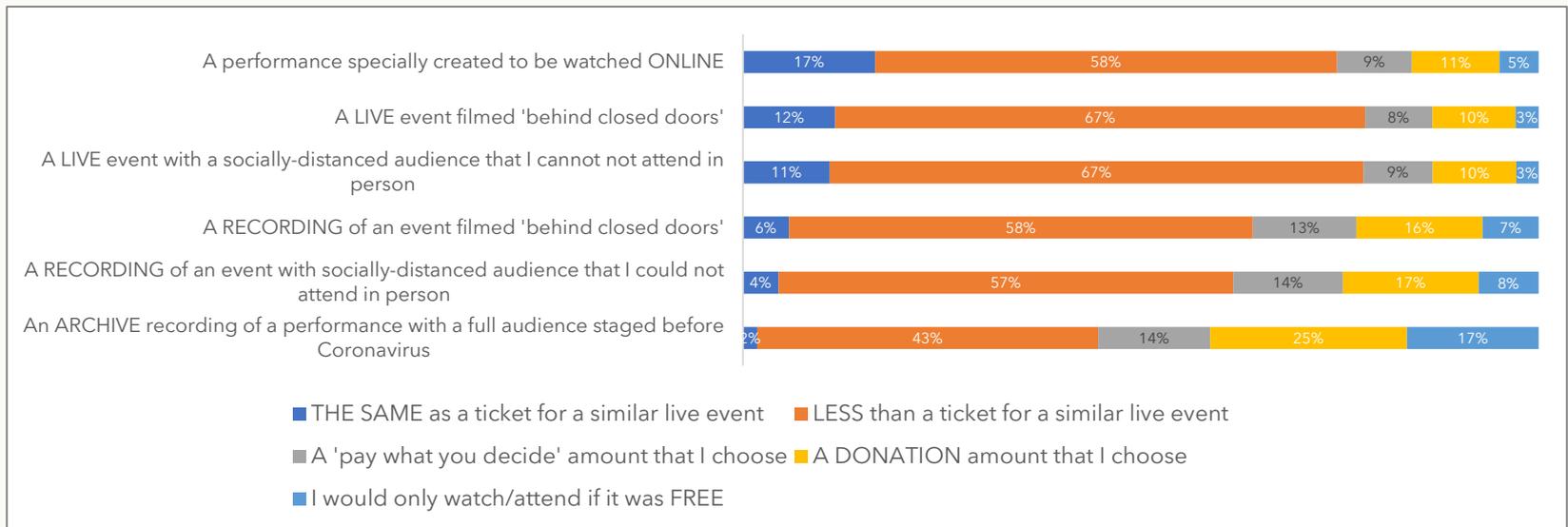
Although less interested in most of the types of events, family bookers have slightly **more positive expectations** than general respondents, and more likely to agree with the statements:

- 'I will find it easy to access digital performances'
- 'I will enjoy knowing that other people are watching at the same time as me'
- 'I expect it will be different from a live event, but will still be a satisfying experience'

Digital culture

Act 2

Q: For each of the following, please tell us what you would consider spending in order to watch or attend an online cultural event.



Family bookers are **more likely** to pay 'THE SAME AS LIVE' for performances specially created to be watched online.

They are **less likely** overall to consider the DONATION option.

"For those with young families online opportunities are **vital** to be able to continue to **engage with arts**"

"We really enjoyed it as a family it really **kept our spirits up** and I think there is scope to continue **blended theatre** with online and in person performances."

"I have really enjoyed watching theatre performances online with my primary aged children. They have enjoyed **making tickets and posters** beforehand and we have used some of the education packs when available. We have seen plays we would **not have been able to afford** to go to as a family if at the theatre."

"Online events I think need to be **interactive** in some way... I am looking for something where there is feedback / presenter is acknowledging me and my presence. That for me is **why I would pay** for gym classes rather than get free ones or do certain kids classes."

"I think **I will struggle** to get my children to **engage** with them in the same way they would as a live performance"

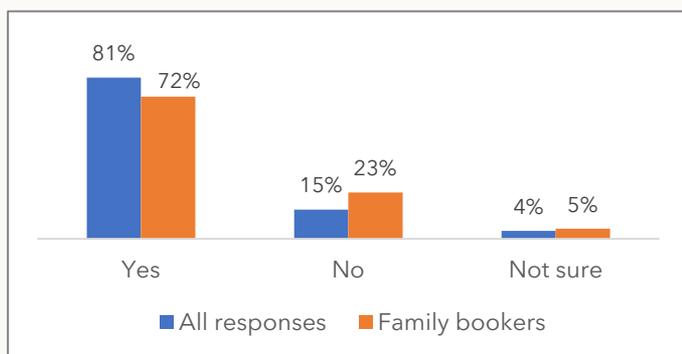
"Keeping kids engaged with a screen is **really HARD** to do."

Outdoor culture

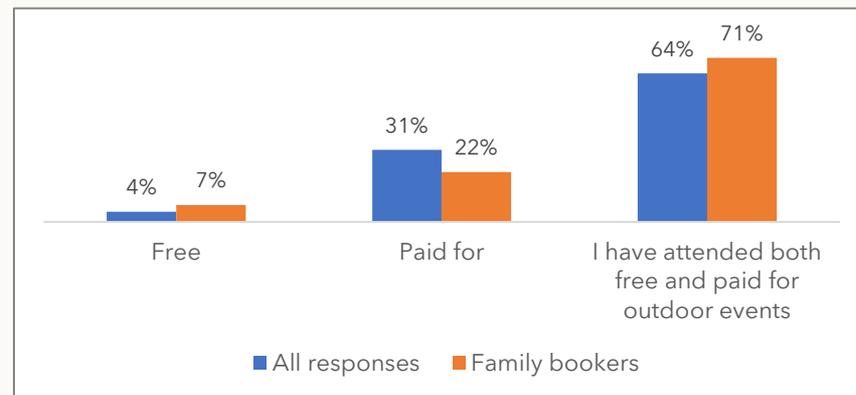
Q: Have you ever attended an outdoor arts event?

Q: What type of outdoor events have you attended?

Act 2



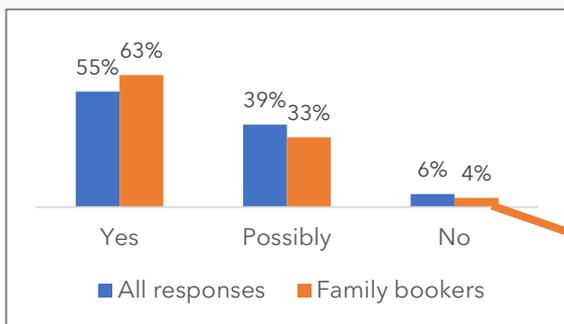
Family bookers are **slightly less likely** to have previously attended an outdoor arts events



They are also **less likely** to have only been to paid events

Outdoor culture

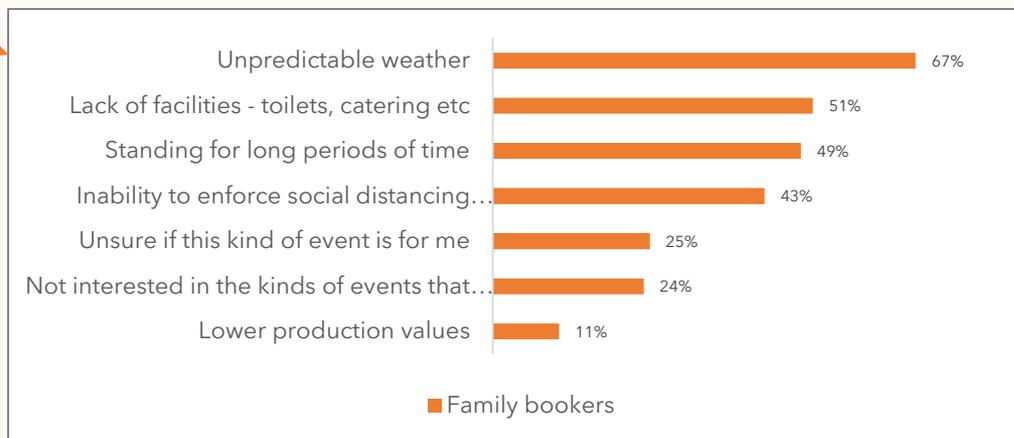
Q: If you were unable to go to cultural events in a venue for the foreseeable future, might you be interested in trying out events taking place OUTDOORS?



96%
are interested in culture outdoors

This is **even higher** than the general response (94%)

Q: Which of the following reasons explain why you are NOT interested in engaging with outdoor events?

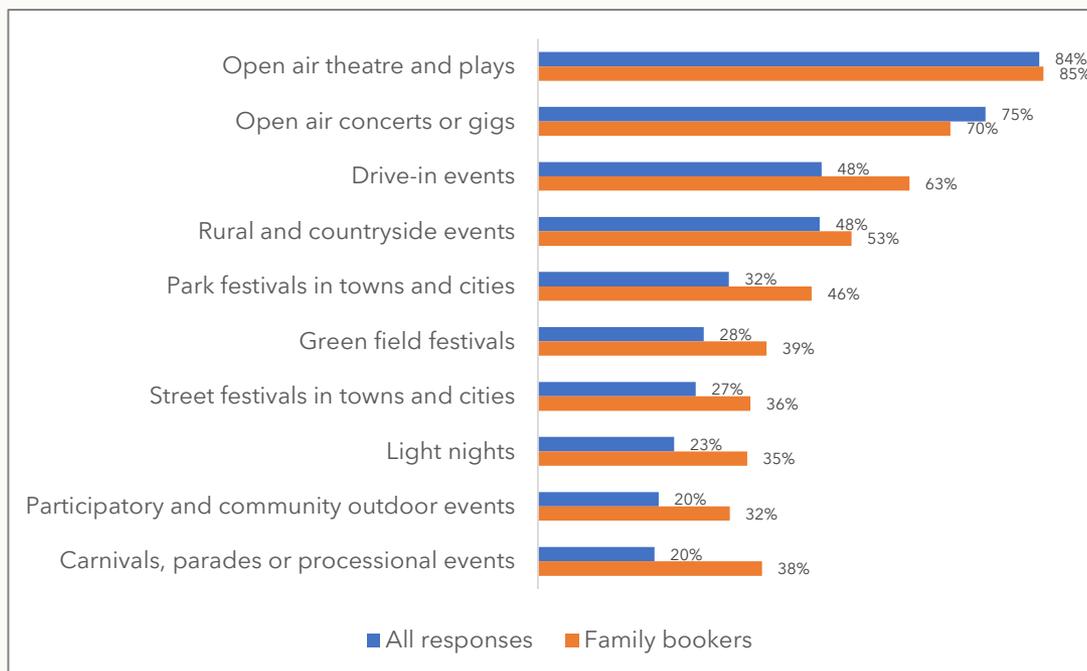


Needing to **stand for long periods** of time is much less of an issue for Family bookers (49%) than general respondents (65%)

Outdoor culture

Q: If you felt confident that the appropriate social distancing measures were in place, which of the following types of outdoor events would you be most interested in attending?

Act 2

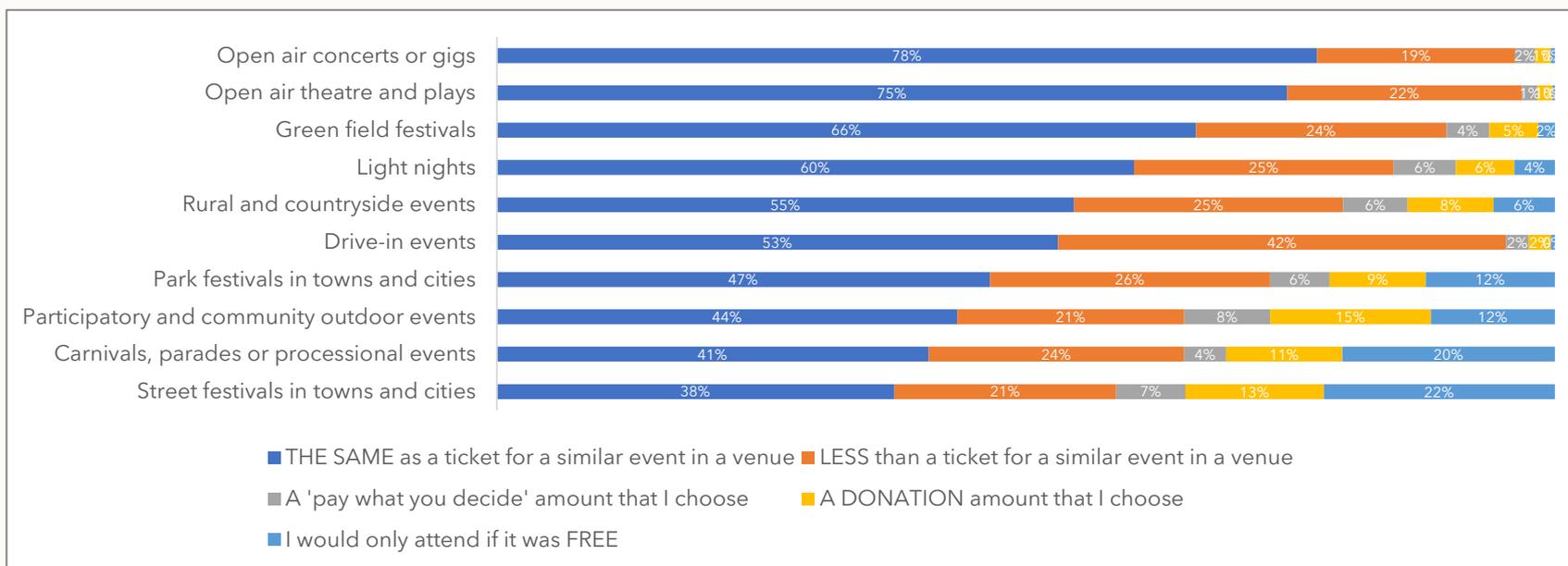


Family bookers are more interested in attending a **wide variety** of outdoor events – and are keen to try events which are not just an ‘outdoor version’ of what they could see in a venue (plays, concerts)

Outdoor culture

Q: For each of the following, please tell us what you would consider spending in order to attend an outdoor event.

Act 2



For all types of outdoor events, **a higher % of family bookers** compared to general respondents would consider spending **THE SAME** as they would for a similar event in a venue.

Outdoor culture

Family Booker comments

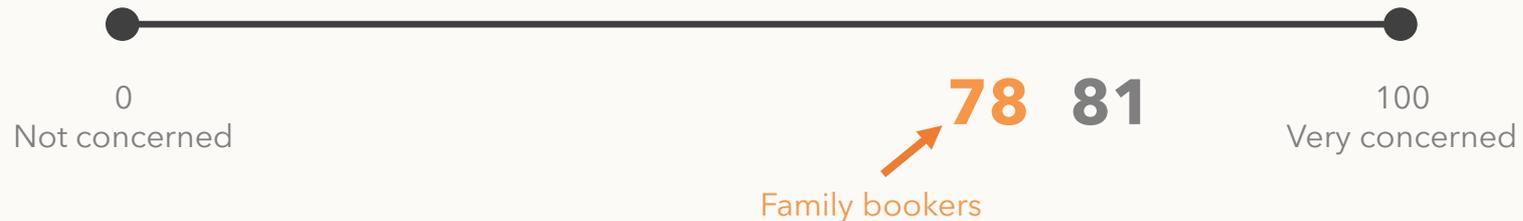
"I feel that outdoor events would be **great** - and I would have **total confidence** in coming especially for children."

"I would love to see some **outdoor, family-orientated, socially distanced** daytime performances in the coming few months, I'd be happy to pay the same as for an indoor performance... we are **fed up with screen time.**"

"I **really enjoy outdoor** theatre/concerts with a picnic (great with young children too as it is **more informal** and more freedom for the kiddies)."

"Have been put off outside theatre because of **unpredictable weather**, so don't usually go to them, wouldn't want it to be raining heavily."

Q: How concerned would you say you are about the financial survival of the organisation who sent you this survey?



Q: How much do you think you will be able to spend on cultural events once they can happen again 'as normal'?



Economic
viability

Family Booker comments

Act 2

“I wish I could do more to support the arts at the moment, but the current situation has **adversely affected my family's financial situation** and I have to be very cautious about money at the moment.”

“I want to try and support theatres and live events as much as possible because **I enjoy these and so does my little boy** and I want them to survive but I will need to be careful with money as **my partner has no work and our income has dropped** at present.”

Comments from Family bookers

Many comments were about the **importance of creative experiences** for families and sadness about missing out on this:

"I'm keen to build **family memories** with my primary aged kids on days out."

"I am sad that my children are **missing out** on amazing shows and performances."

"[Children] are also missing out the most as they will be missing out on seeing these live performances at a stage of their development when they can gain a great deal of **inspiration and enrichment** from them"

"I want my daughter to be able to come back to taking part in events **as soon as it is safe.**"

"The cancellation of... live events has been a **huge loss to me and my small child** - this will never be recovered as she is only 3 and this year we had many plans to attend events regularly that she would appreciate more. I feel extremely sad at this loss."

Comments from Family bookers

People also **expressed concern** about the potential **negative impact** on the Family Arts sector:

"I haven't come across any events being advertised **specifically for children** this summer and there are usually lots."

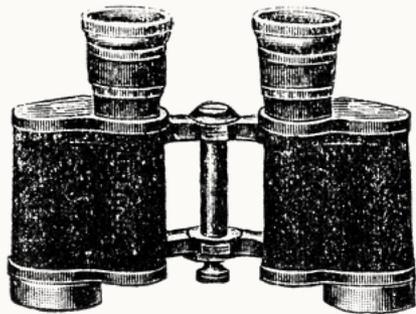
"Our main concern in returning is that there will be **more performances directed at adults.**"

"I hope there is **investment in the sector** not just in terms of ticket sales but how it could be galvanised to **work with the education sector.**"

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