



## After the Interval survey

### Insights from Act 2

Weeks 1-6

August 2020





## How was the research conducted?

The survey is in partnership between Thrive and Katy Raines of Indigo Ltd. The survey was sent out between 15<sup>th</sup> June and 26<sup>th</sup> July, and collected over 4,800 responses.

The data covers 21 cultural organisations, including 14 from Northern Ireland and 7 from the Republic of Ireland. While Northern Ireland and the Republic of Ireland are different areas with different lockdown processes and policies, there is not a significant difference between the two datasets. As a result, we have reported the findings in total among NI and ROI audiences.

Organisations are welcome to quote data from this survey, however we ask that you credit the After the Interval Survey, a partnership between Thrive and Indigo Ltd.

# Results from Act 2

## Weeks 1-6

Are people actively booking  
tickets for events?



84%

of audiences of NI and ROI venues  
are not currently booking for events

Of the 16% who are currently booking, when are the events happening, and what are they booking for?

# While a small minority are booking for summer events, most are booking for events September or later

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

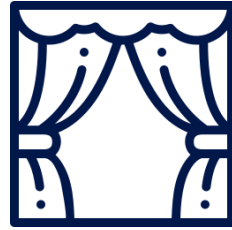


Which of the following best describes the type of event it is?



28%

Rock or pop  
concert



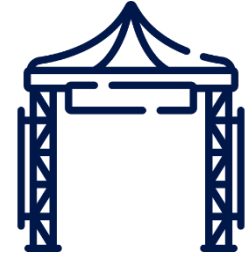
21%

Theatre, opera  
or dance  
performance



16%

Comedy event



10%

Outdoor event

Additional items mentioned:

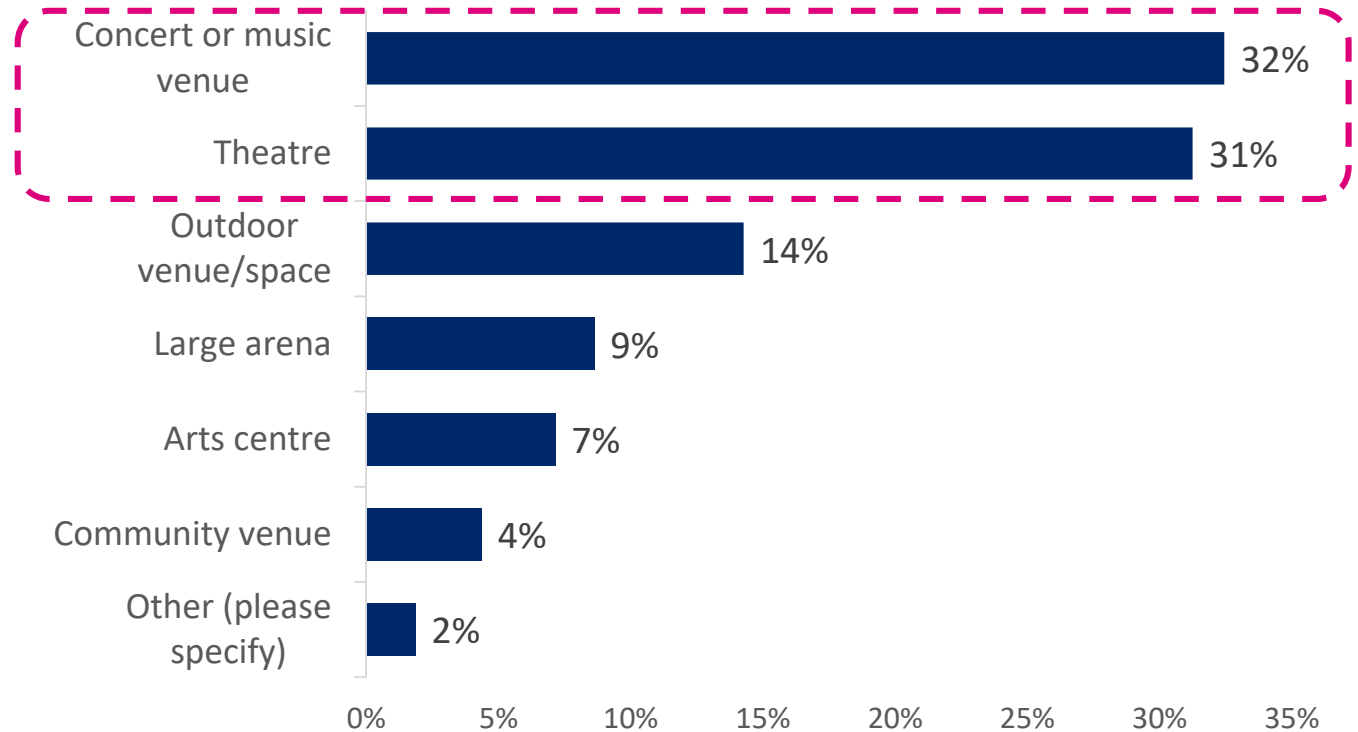
- Classical music concert (7%)
- Family/children's event (5%)
- Festival (1%)
- Other (11%)



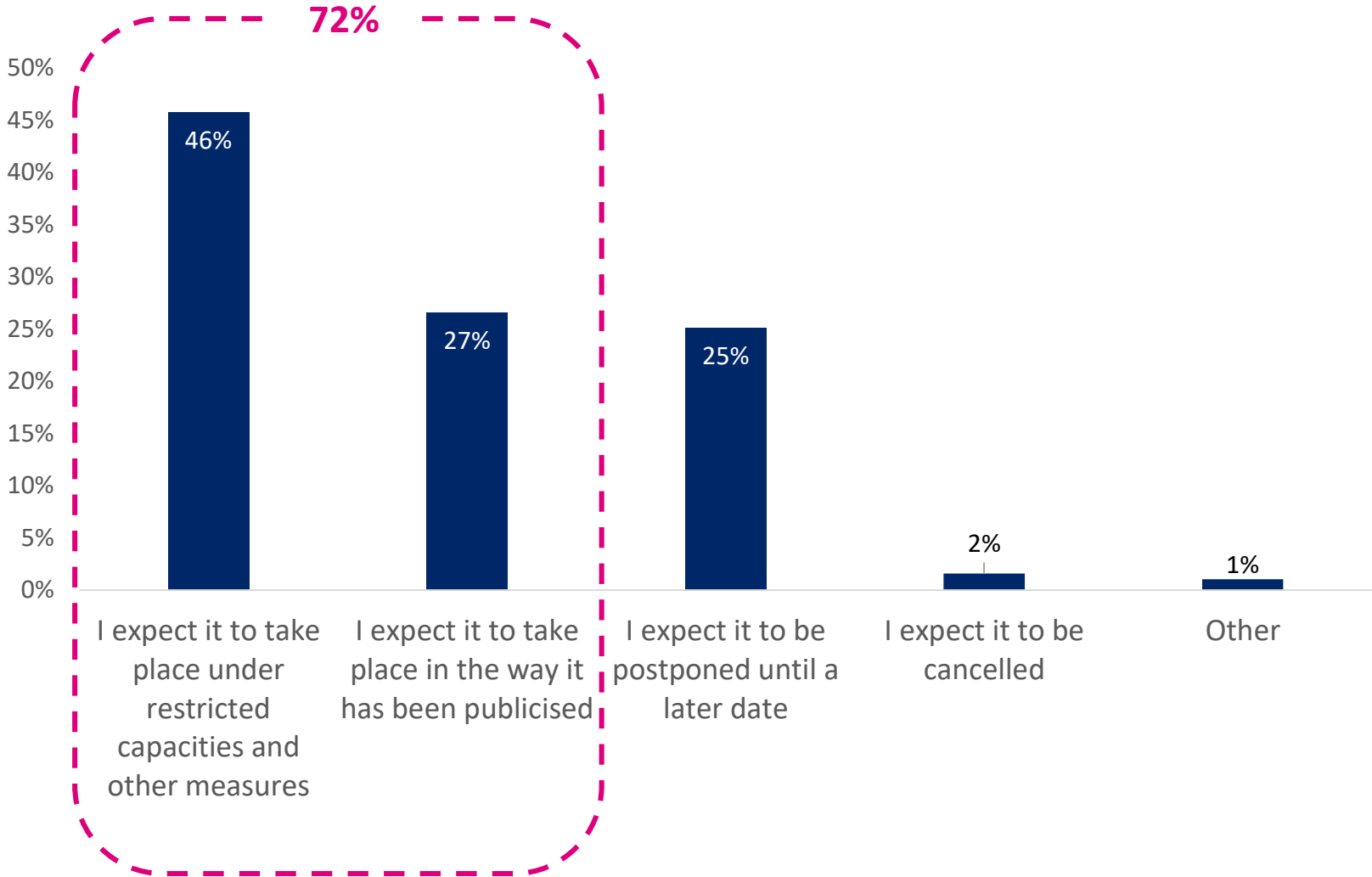
# Of the different types of venues, audiences are most likely to be booking for theatres or music venues



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



What is your current expectation regarding this event?

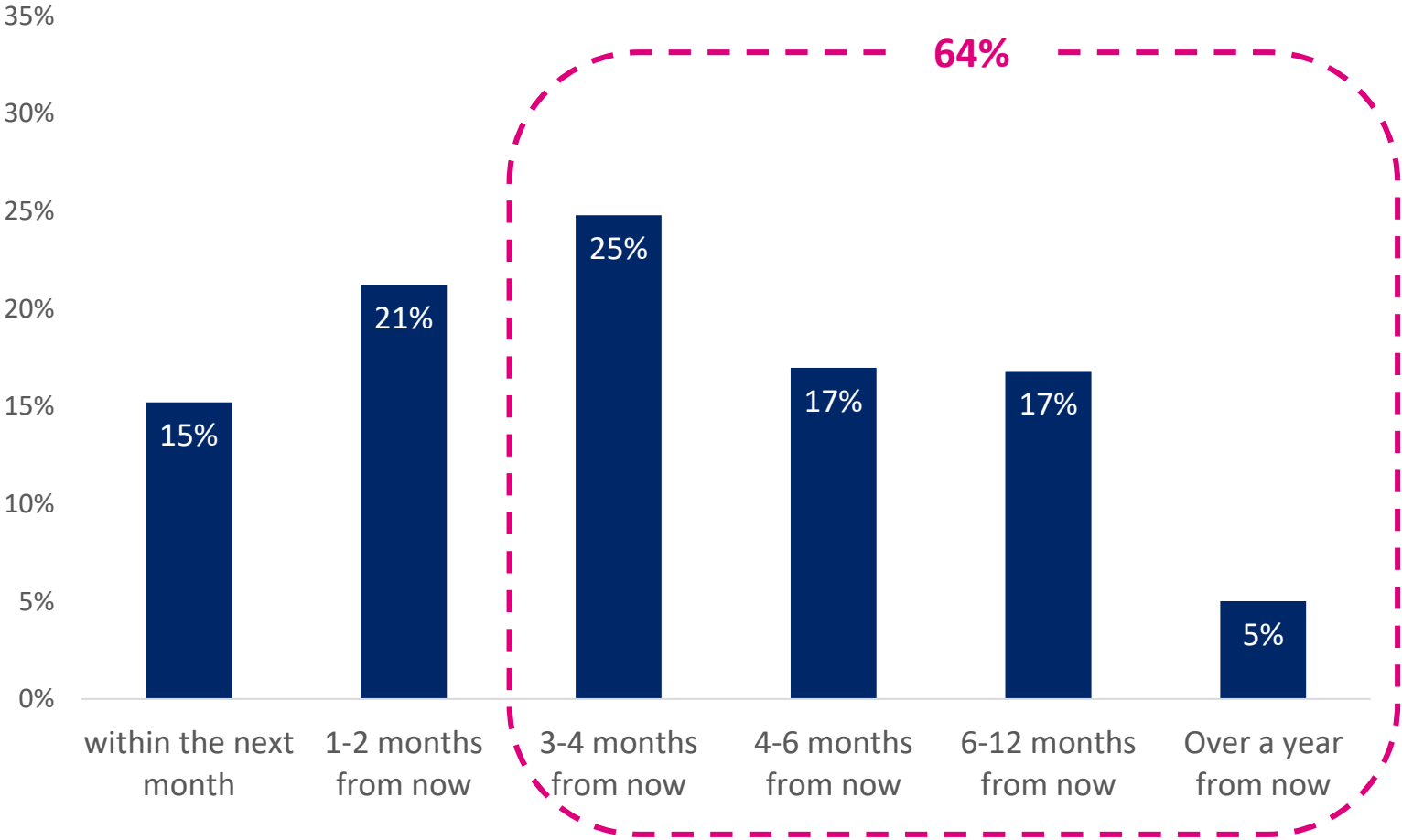


72% of people who are currently booking expect the events to go ahead.

Nearly half (46%) expect the events to happen with restrictions in place.

What about the audiences who  
aren't booking events yet?

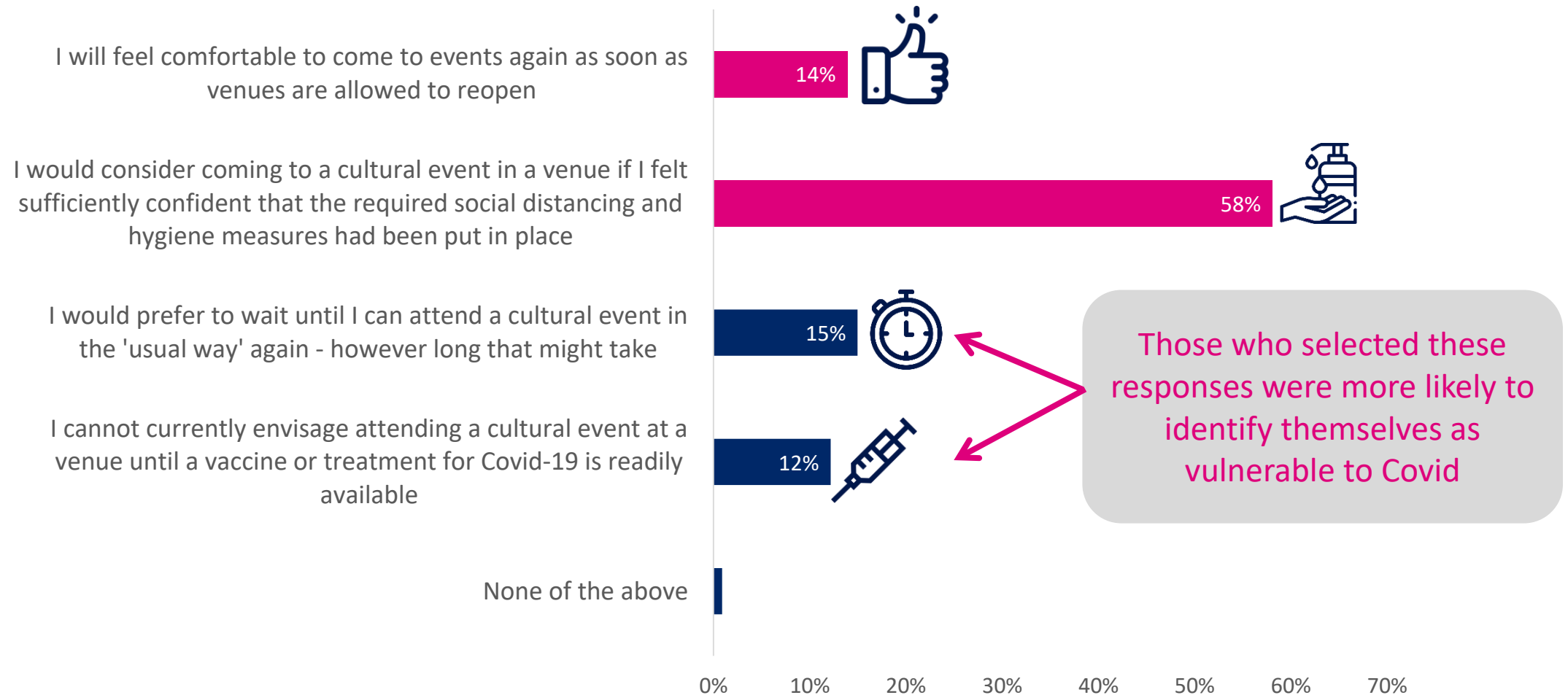
If you had to say now when you think you'll be ready to start BOOKING for events again, which of the options below would you choose?



Most audiences won't feel ready to book until at least 3 months from now

# Nearly three quarters of audiences would consider attending events if venues reopened with social distancing

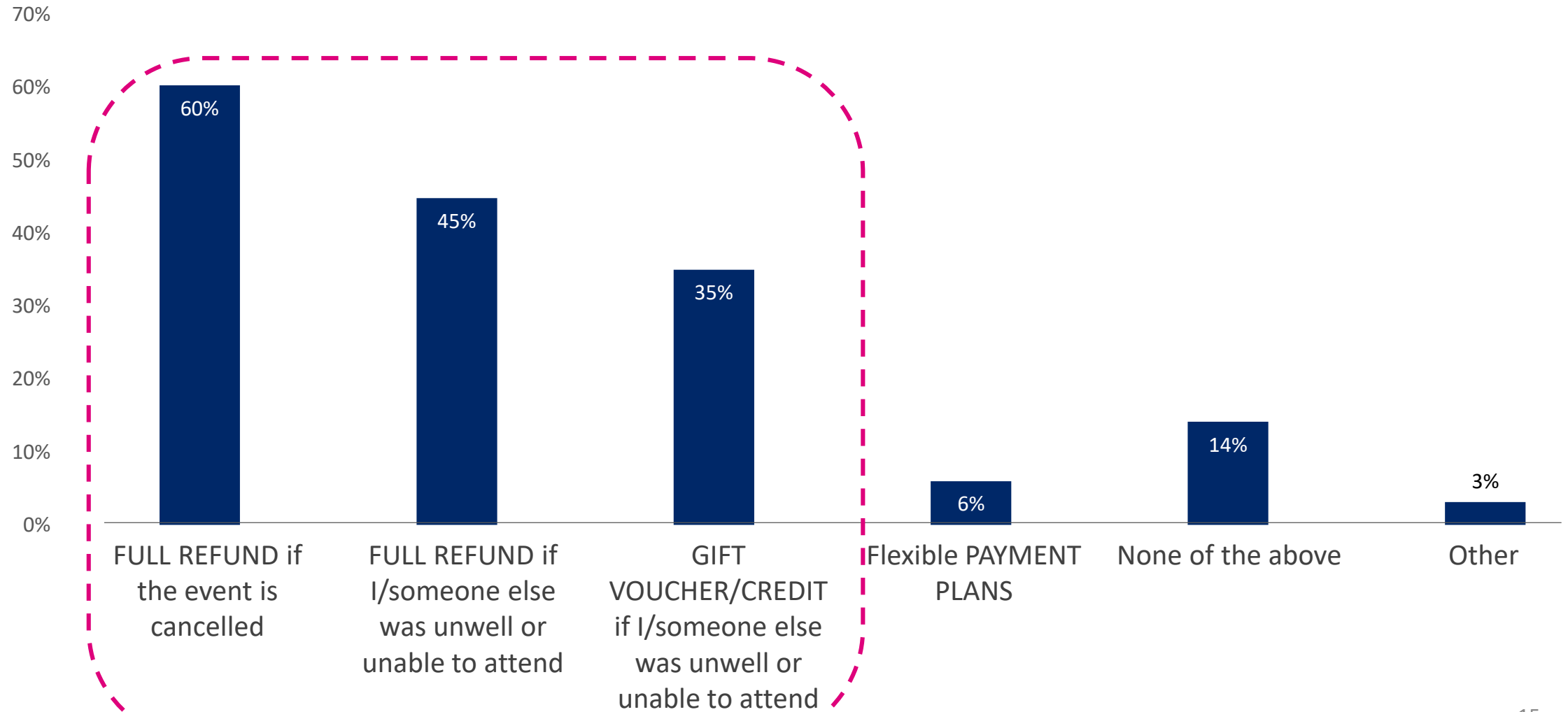
Please tell us which of the following statements best fits how you're currently feeling about coming out to events at a venue again



What will help audiences to feel more comfortable attending live events again?

# More than one third of audiences prefer a full refund or credit in the event of a cancellation or if they were unable to attend

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



## About the performance:



Audiences want **MORE** of this:



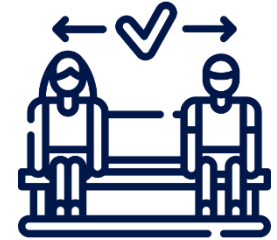
Buy tickets as a  
'household'



Limits on  
attendance



Knowing how performers/  
artists are being kept safe



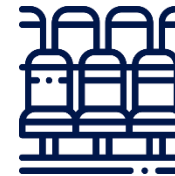
Seats spaced  
2m apart



Audiences want **LESS** of this:



Daytime  
performances



Unreserved  
seating



Avoiding contact with people:



Audiences want **MORE** of this:



Queue management



Scheduled arrival times



Staff wearing masks



Audiences want **LESS** of this:



Needing to take public transport to the event

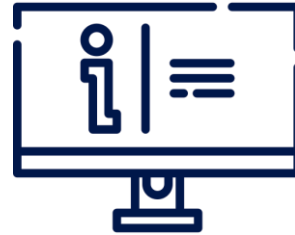
# Hygiene:



Audiences want **MORE** of this:



Availability of hand sanitiser



Seeing venue cleaning procedures



A 'kite mark' for venues who adhere to a clear set of standards

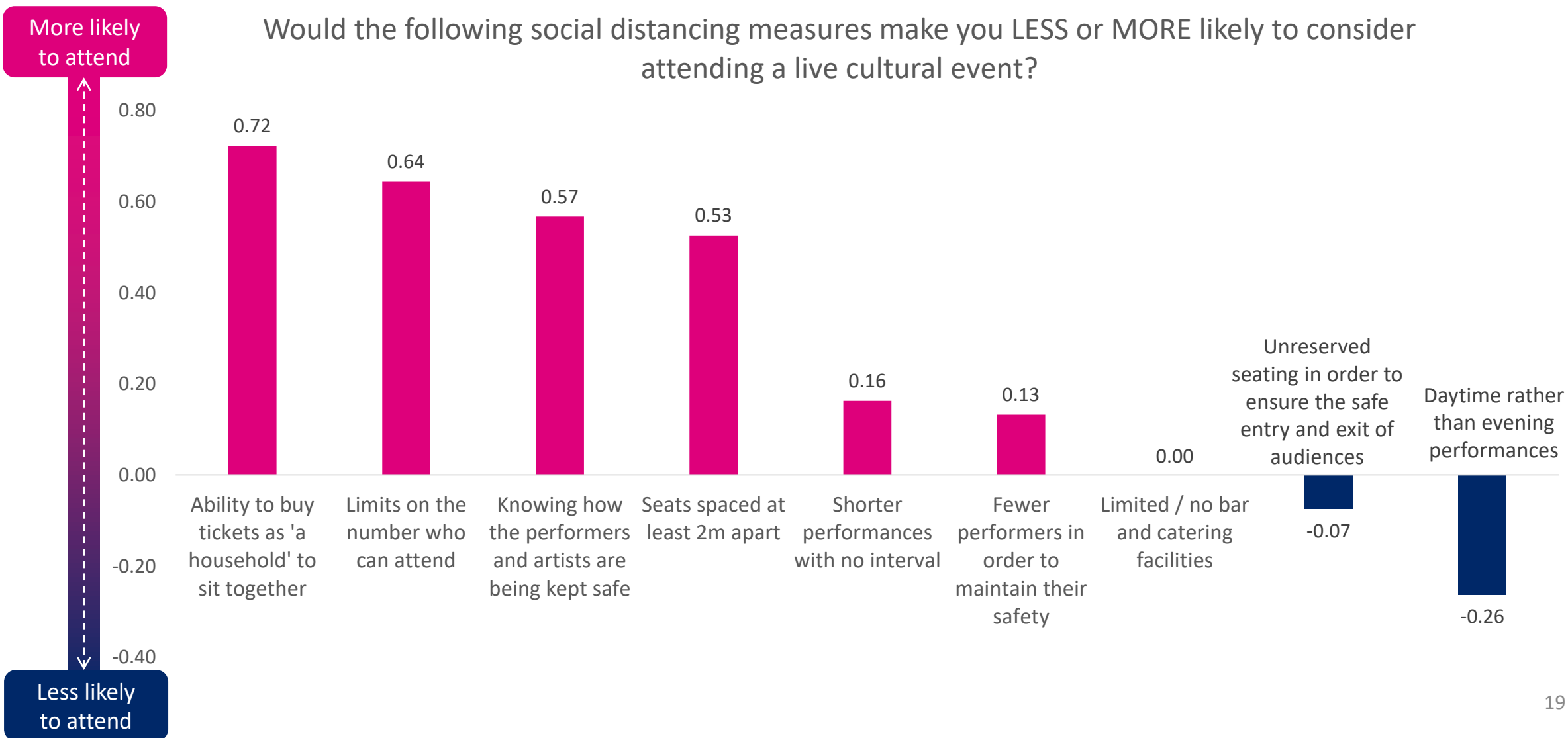


Audiences want **LESS** of this:

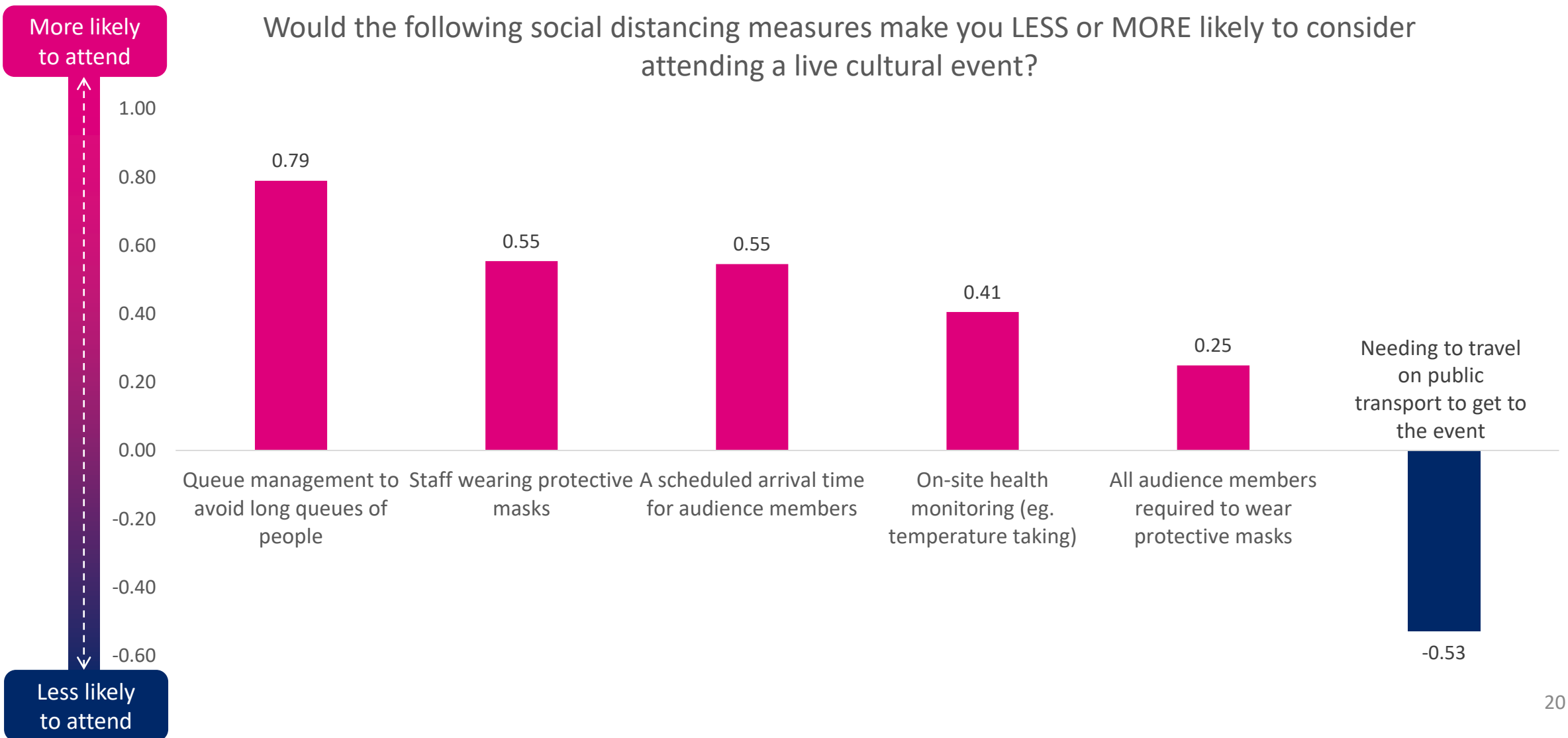


Restrictions on toilet facilities

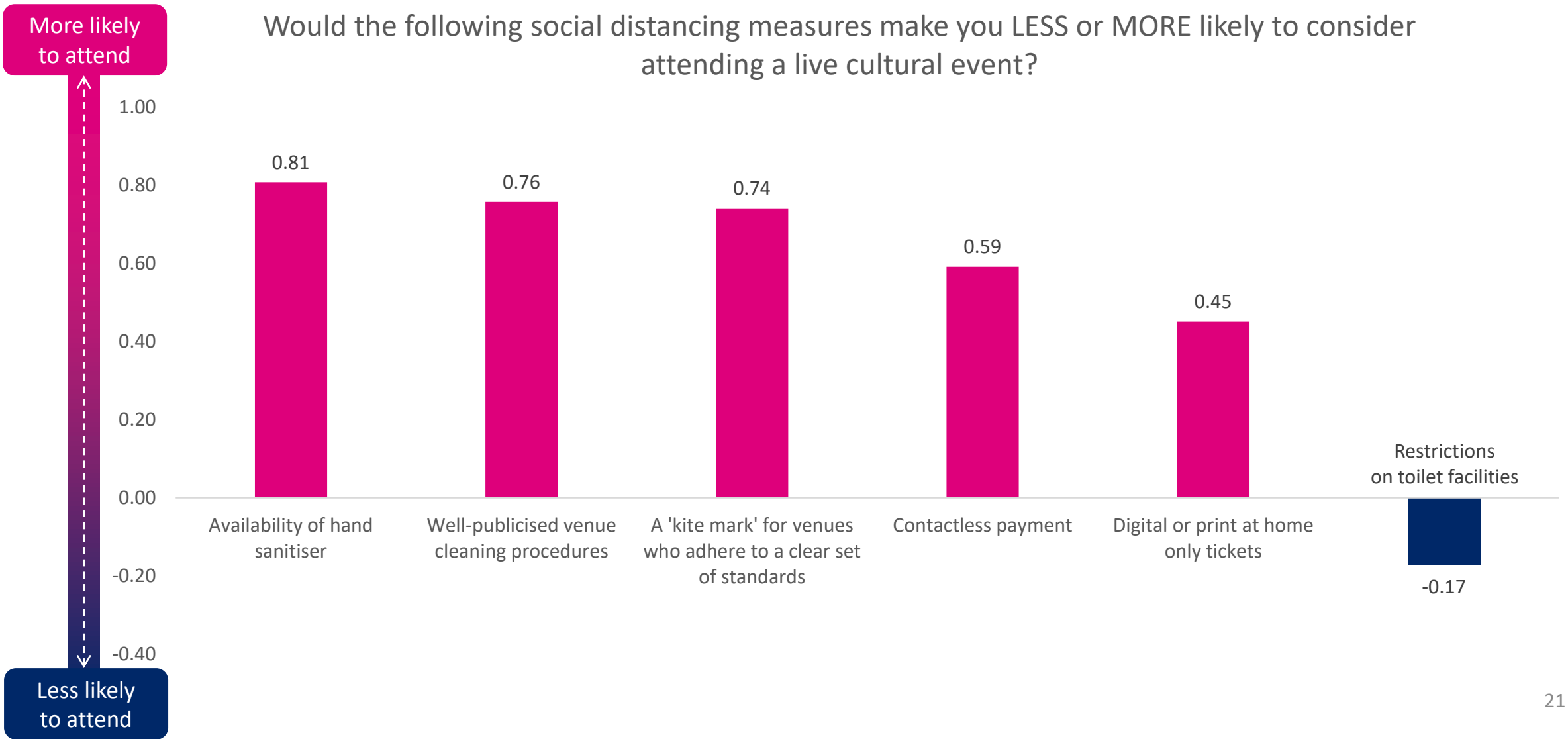
# About the performance:



# Avoiding contact with people:

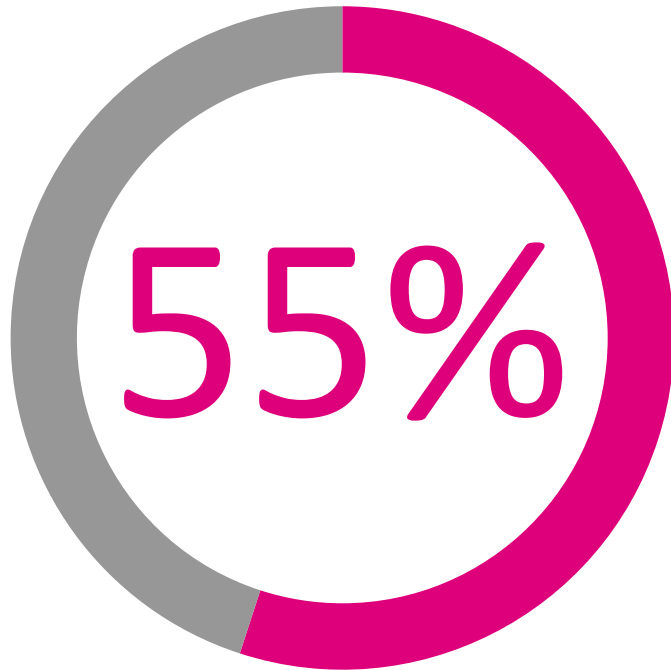


# Hygiene:



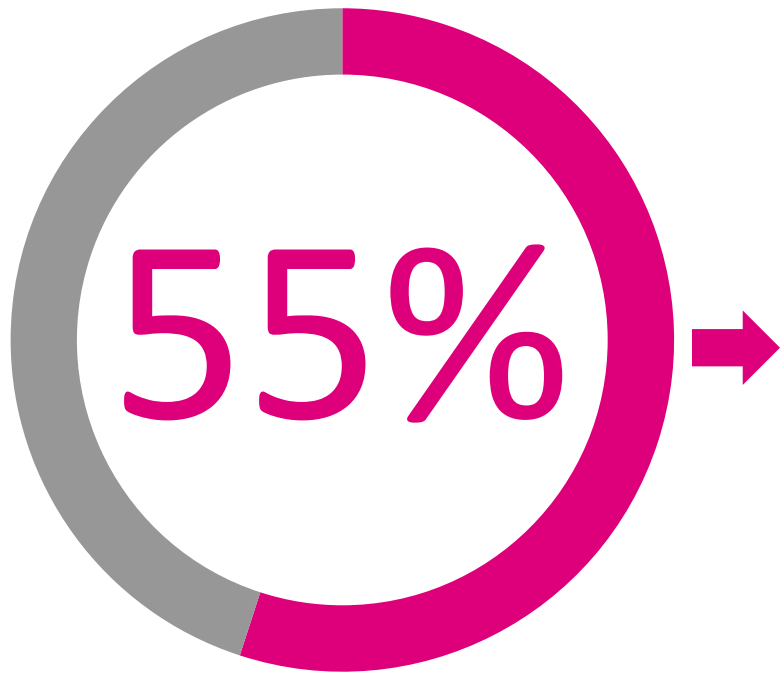
Are audiences engaging with cultural events online?

YES

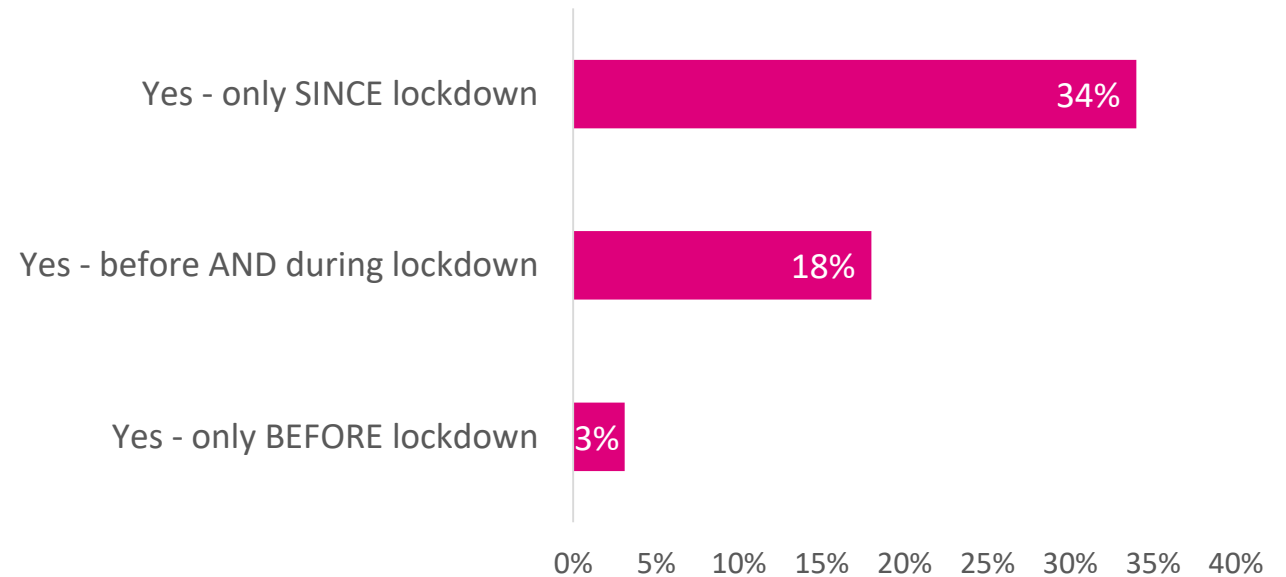


of audiences of NI and ROI venues  
have engaged with cultural events online

# One third are new digital audiences, having only engaged with online events since the lockdown started



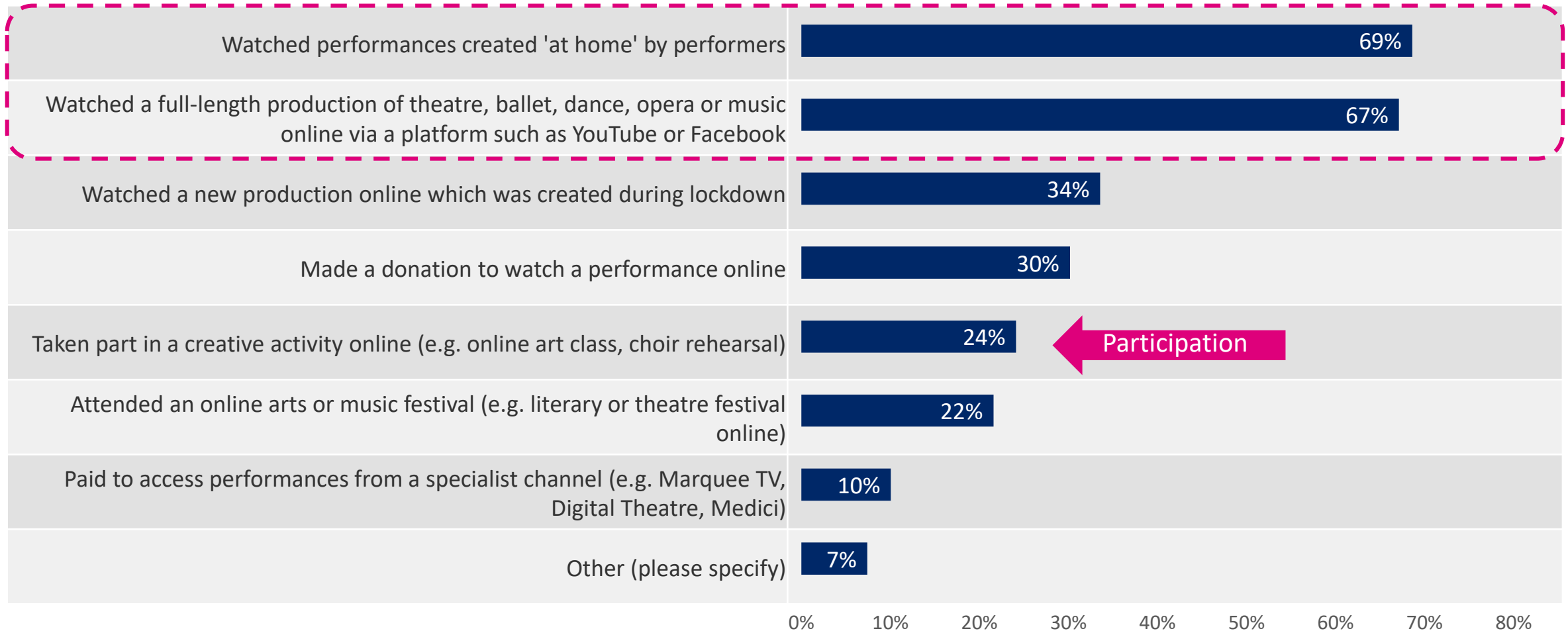
Have you engaged with any cultural events ONLINE, either before or during the recent lockdown?





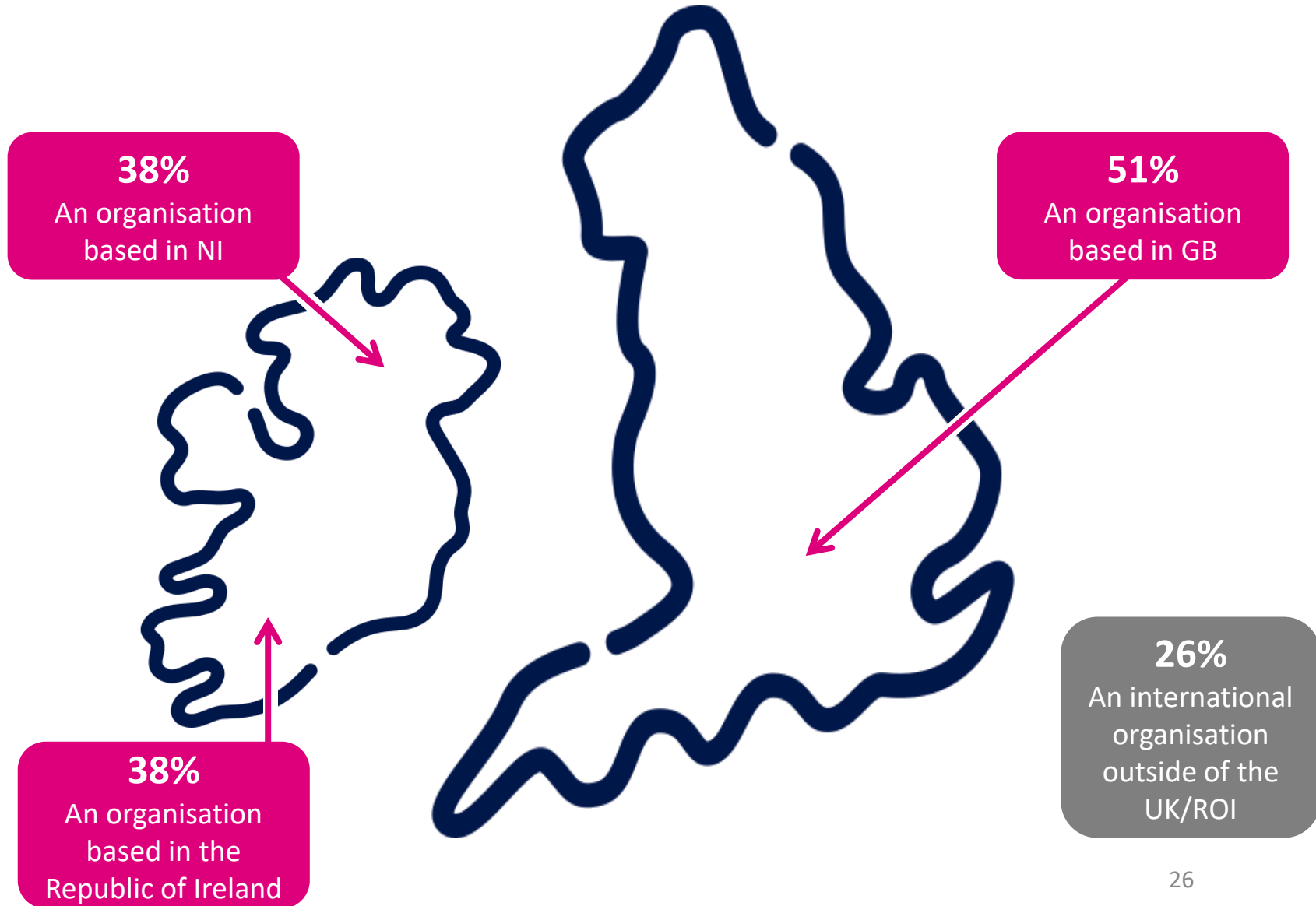
# Two-thirds of audiences have either watched full-length productions, or performances created at home

Which of the following types of online activity have you done during lockdown? (Please tick all that apply)



0% 10% 20% 30% 40% 50% 60% 70% 80%

Were any of these online activities produced by the following types of organisations? (Please tick all that apply)

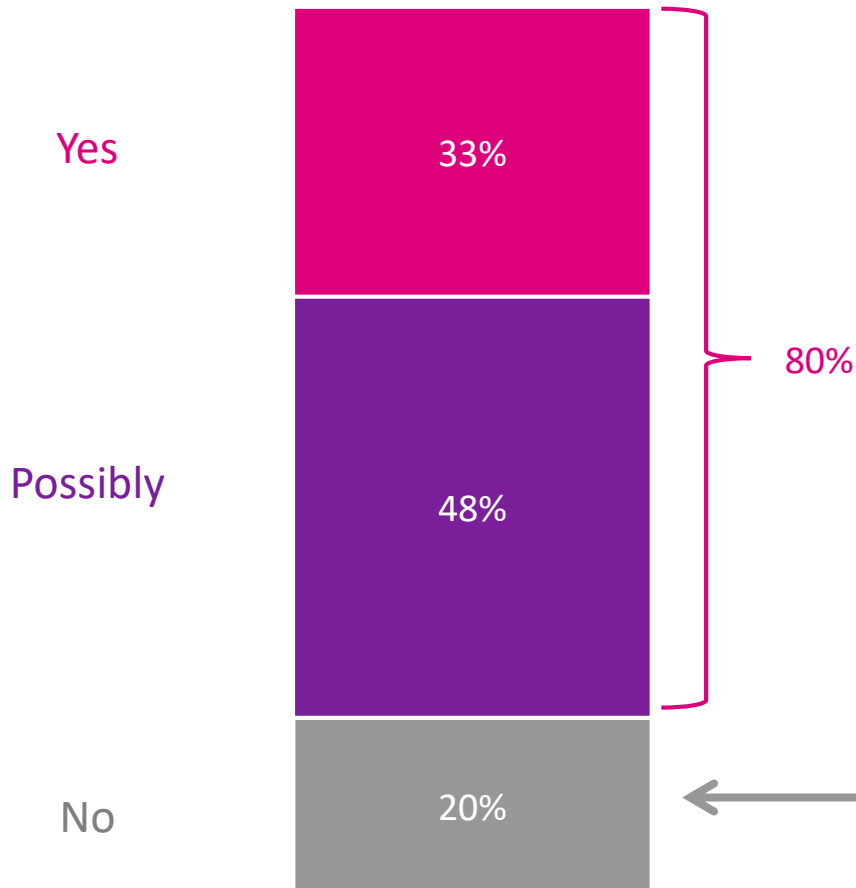


Audiences consumed online content from local, GB, ROI and international cultural providers, showing the opportunity online offers, but it's also a crowded marketplace

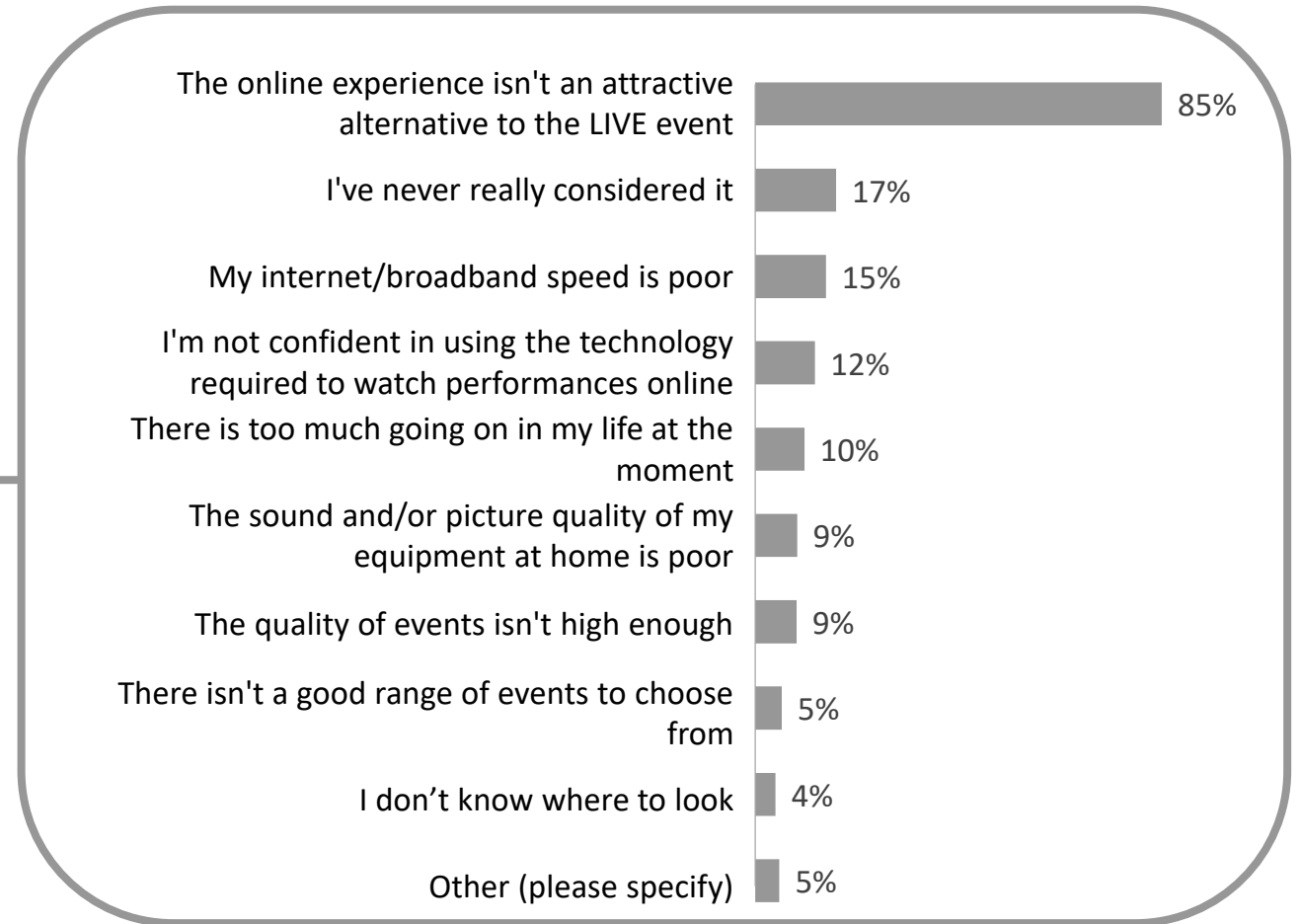
Would audiences be interested in  
engaging with cultural events online in  
the future?

8-in-10 respondents would be interested in engaging with cultural events online. Of those who aren't interested, the vast majority say they are simply not an attractive alternative to live events.

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?

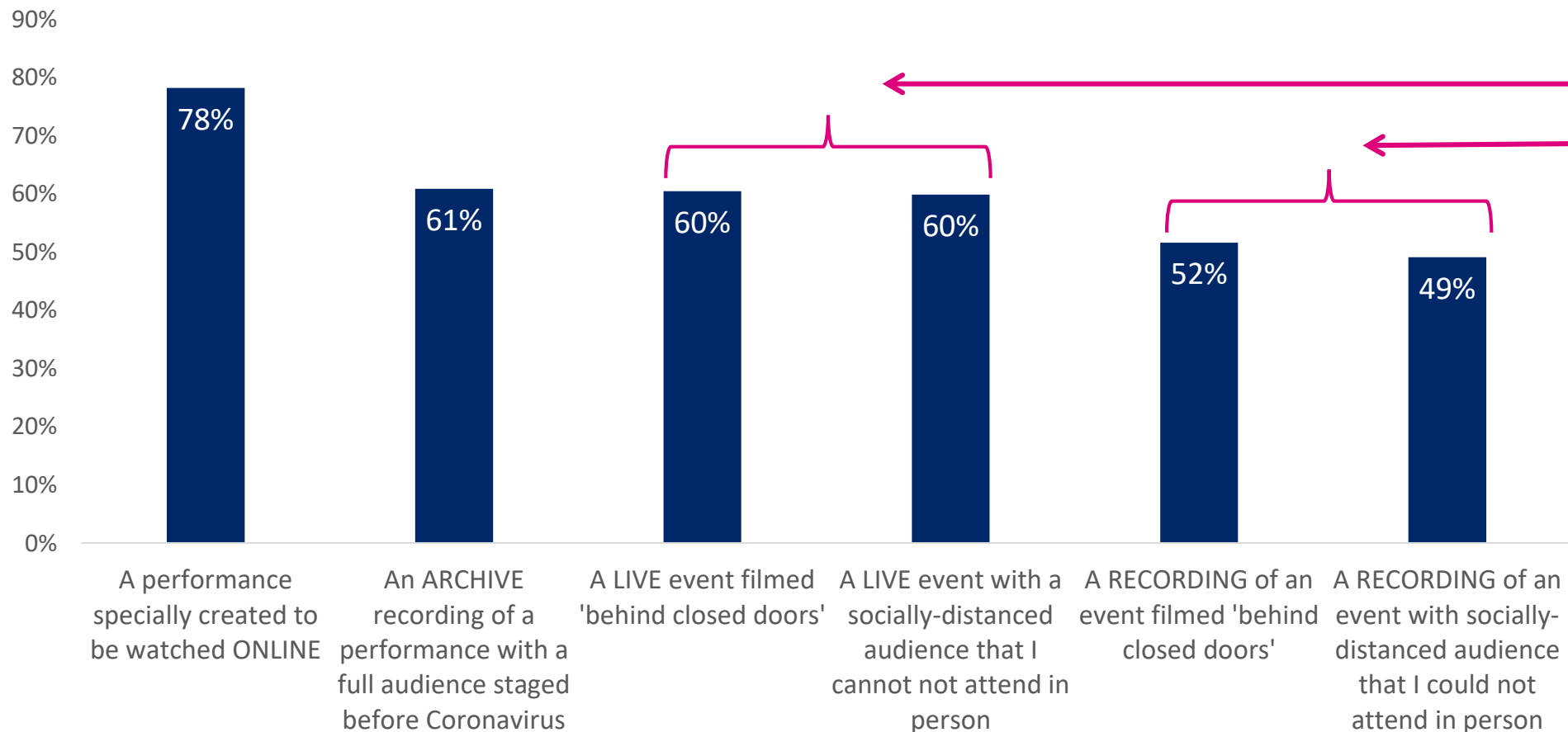


Why are you NOT interested in engaging with cultural events online or digitally?



Most are interested in watching a performance specifically created to be watched online. Audiences were less interested in recordings and archived events.

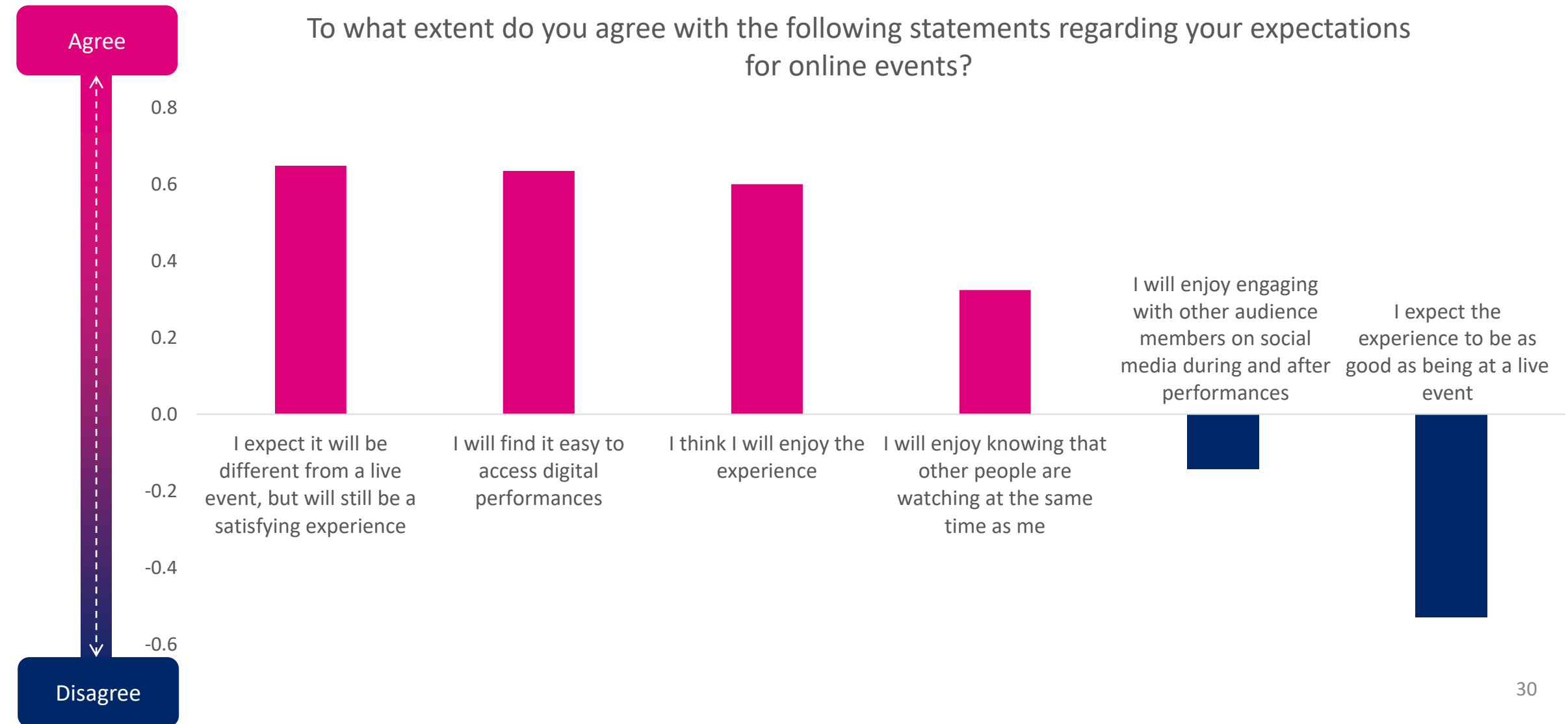
Which of the following might you be interested in engaging with online in the future? (tick all that apply)



There is little difference between wanting to watch certain types of events online **in general**, compared to wanting to watch them **because they can't attend**.

This means that their interest in watching the event online is based on the **type of content**, not on it being a **substitute** for attending a live event.

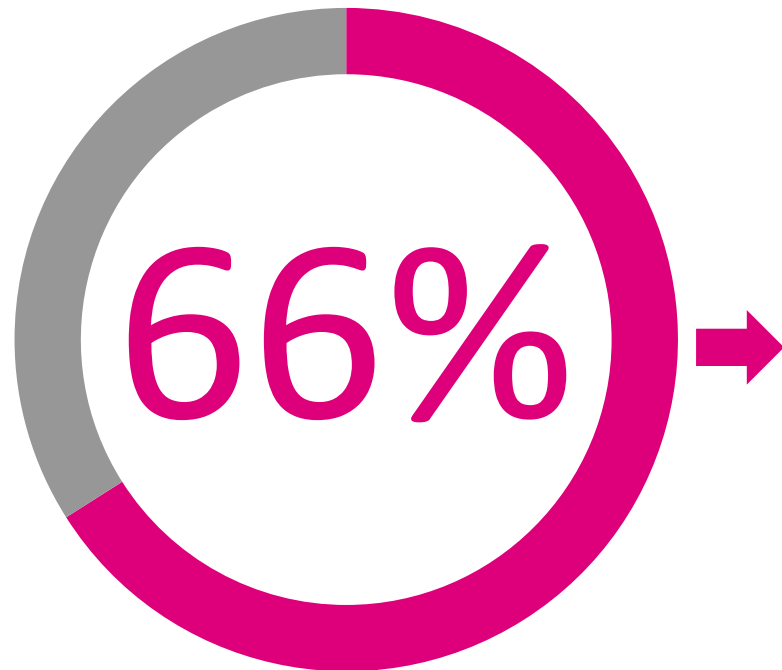
# The expectation is that while online events will be different and still a satisfying experience, it won't be as good as a live event



Would audiences be willing to pay  
for cultural events online?

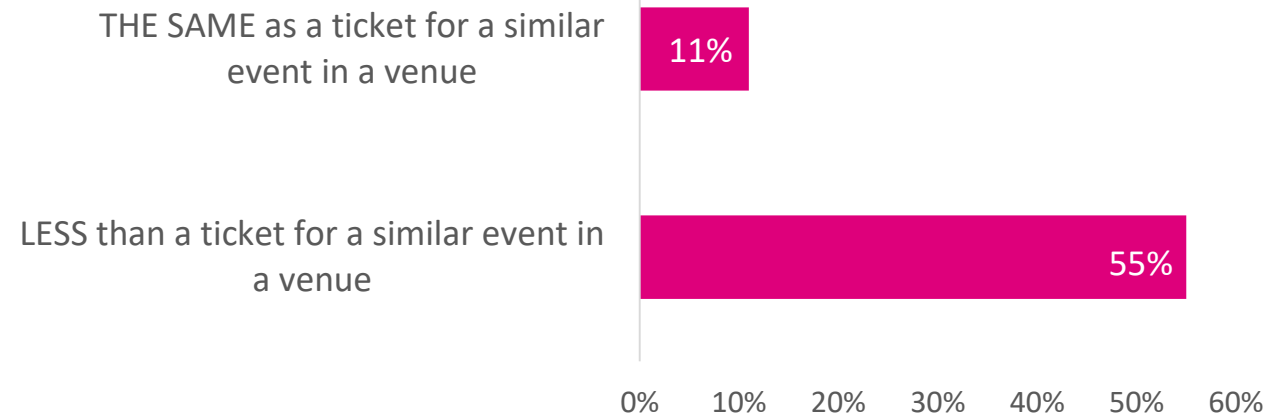
# Yes – 66% of audiences would be willing to pay for a cultural event online

% willing to pay for an online event:



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

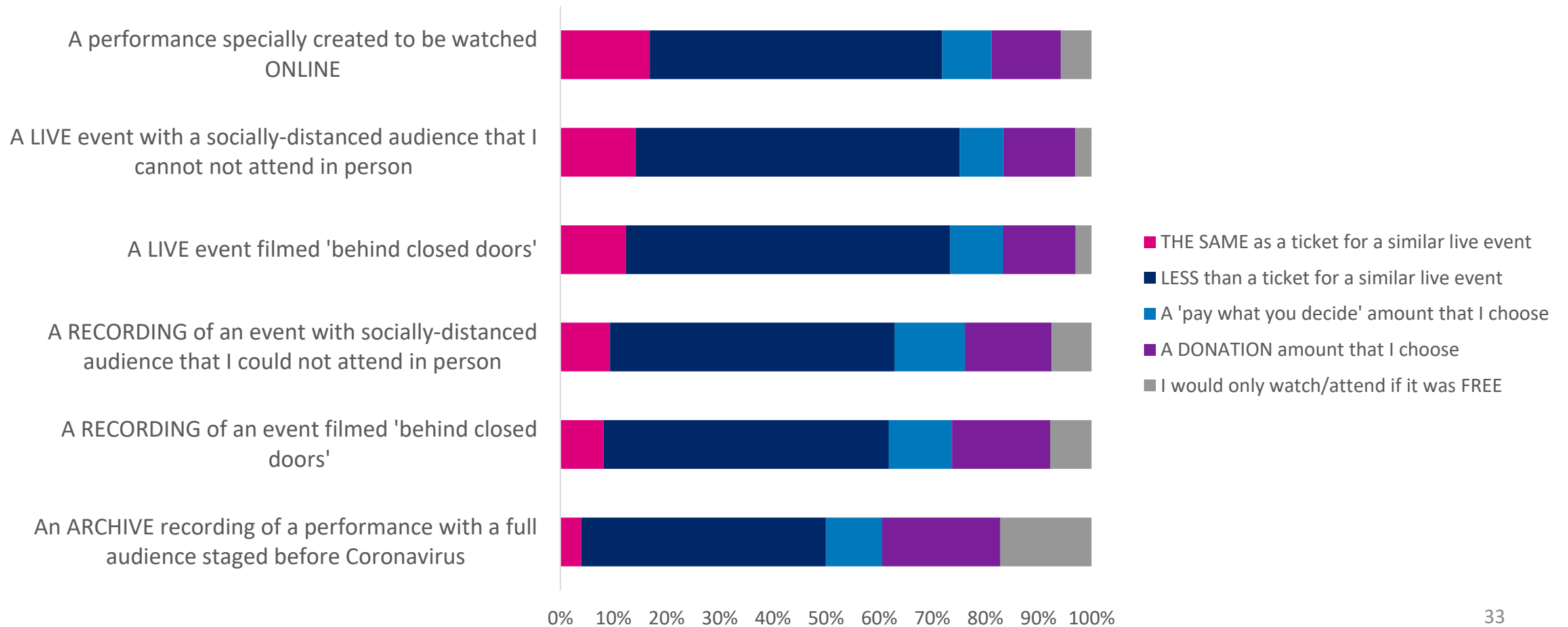
**(Average across the different types of online events)**





# While a small percent of people would pay the same as a ticket for a live event, the majority of audiences would prefer to pay **less** for online content, regardless of the type of content listed

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



Have audiences attended outdoor  
arts events in the past?

Yes – more than 8 in 10 people have attended an outdoor arts event in the past



**82%**

Have attended an  
outdoor arts event in  
the past



Of those who have  
attended in the past,

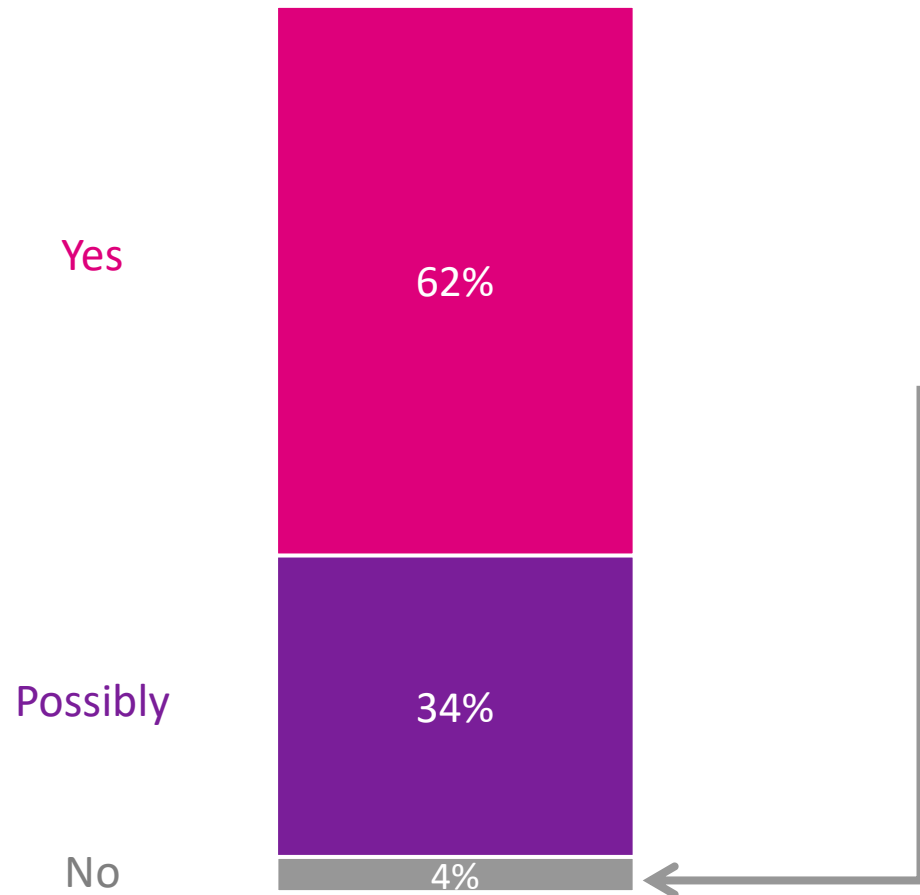
**77%**

have attended both free  
and paid for events

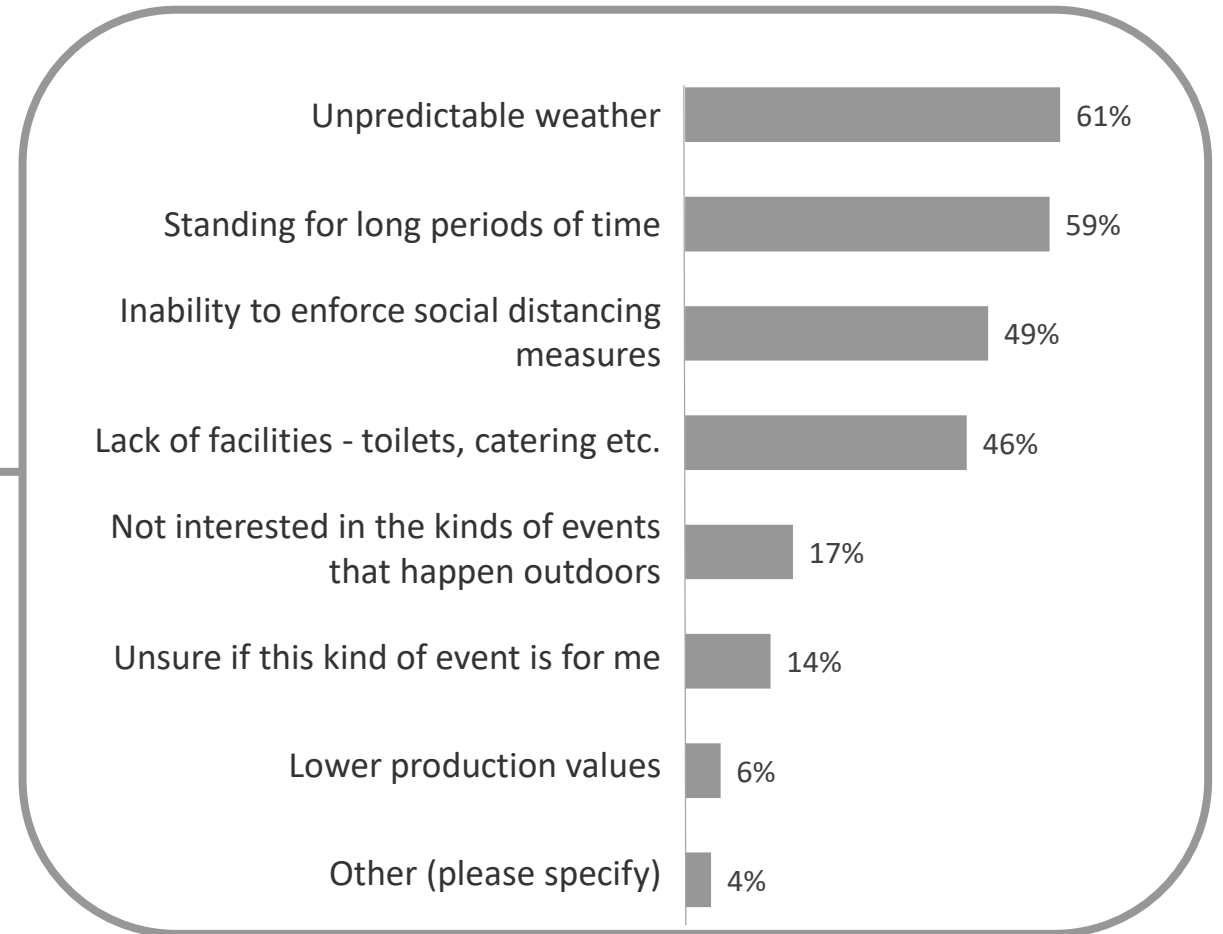
Would audiences be interested in  
engaging with cultural events  
**outdoors?**


Most audiences would be open to attending cultural events outdoors. Of those not interested in attending outdoor events, most say it's due to the weather or being required to stand. Almost half also cited the inability to enforce social distancing measures and lack of facilities as barriers to engagement.

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?



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

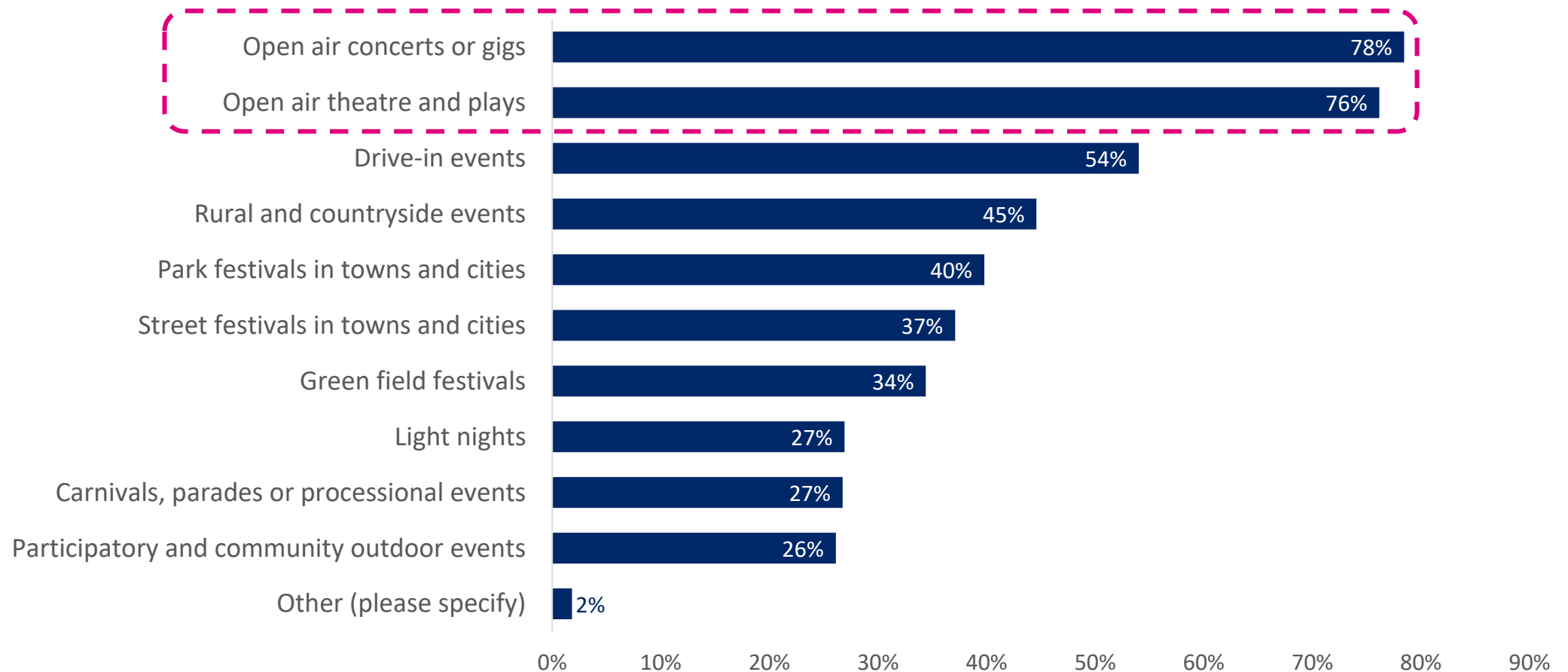


A large crowd of people at an outdoor event, with many arms raised in the air. The scene is illuminated by warm, orange-toned stage lights, creating a bokeh effect in the background. The crowd is dense, and the overall atmosphere is energetic and festive.

Over three-quarters of audiences would be interested in attending the same things they see indoors, outdoors

# Over 75% of audiences would be interested in attending plays or concerts/gigs outdoors

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?

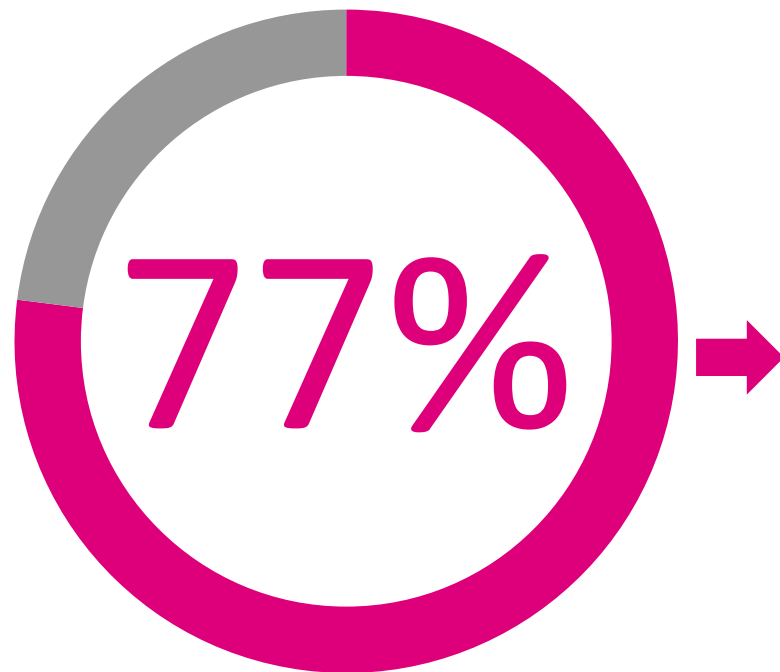


Would audiences be willing to pay  
for cultural events outdoors?



# Yes – more than $\frac{3}{4}$ of audiences would be willing to pay for an outdoor event

% willing to pay for an outdoor event:



Comparison with  
**online events:**

66%

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

(Average across the different types of outdoor events)

THE SAME as a ticket for a similar event in a venue

53%

LESS than a ticket for a similar event in a venue

24%

0% 10% 20% 30% 40% 50% 60%

Comparison with  
**online events:**

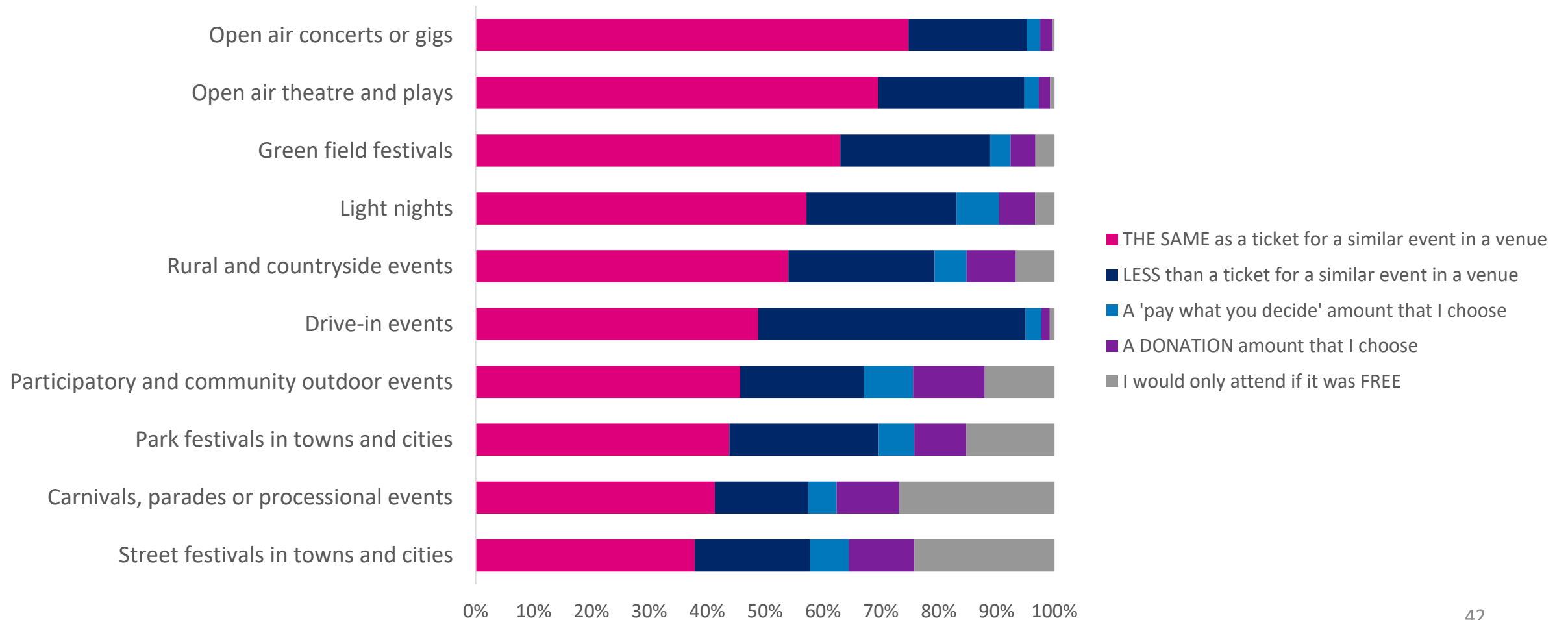
11%

55%

Audiences are nearly **5 times** more likely to pay a similar price for an **outdoor** cultural event compared to an **online** event. This suggests that people are willing to pay similar prices for a similar type of live experience.

# More than **two-thirds** of audiences would pay the same price as a ticket for a similar indoor event, for a concert or play

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

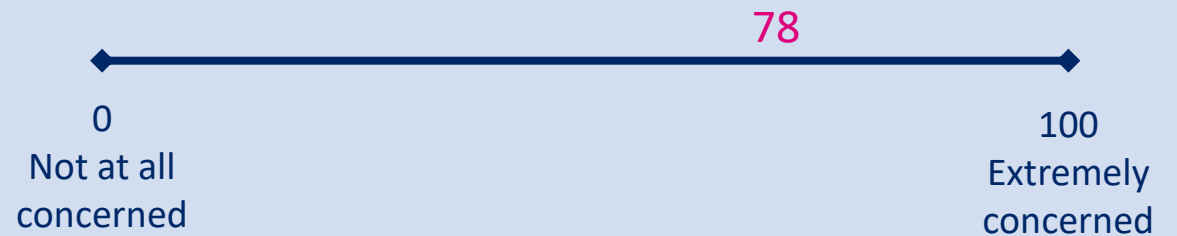


What do audiences think about  
the future of cultural  
organisations?

# Audiences are very concerned about the financial survival of cultural organisations



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



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



This is positive considering a quarter of audiences had their income reduced as a result of Coronavirus

We also asked audiences if they had anything else to tell us about the topic of coming back to events. Their responses continue to show the love they have for the cultural sector, and their appreciation for its contribution to our wellbeing.

“I miss the theatre and culturally events hugely. I am aware of the current hardship and challenges posed for the artists and associated venues. I want to help support the arts whatever way I can during this difficult time.”

“We need the arts in our lives, so some method will have to be found.”



“Very enthusiastic. Arts are key to emotional and mental well being of individuals and areas.”

“It will help with one’s overall wellbeing along with the families and its a very important outlet for us.”

“Nothing compares to live performances and the survival and success of live music and theatre is vital to a cultured society”

## Audiences also voiced their support of different formats

“I hope to return to events...but **am happy to try alternatives** while considered necessary.”

“I would be more likely to try a wider range of performance/events if I could see them online. **It would encourage me to be more adventurous-** the cost of activities inhibits experimentation.”

“**I am very happy to try out events in different formats.** Regarding payment I generally **ticked less** than for a normal event **except where it was live**. But there a different prices for seats and I think it should only be for the cheapest type of seat...”



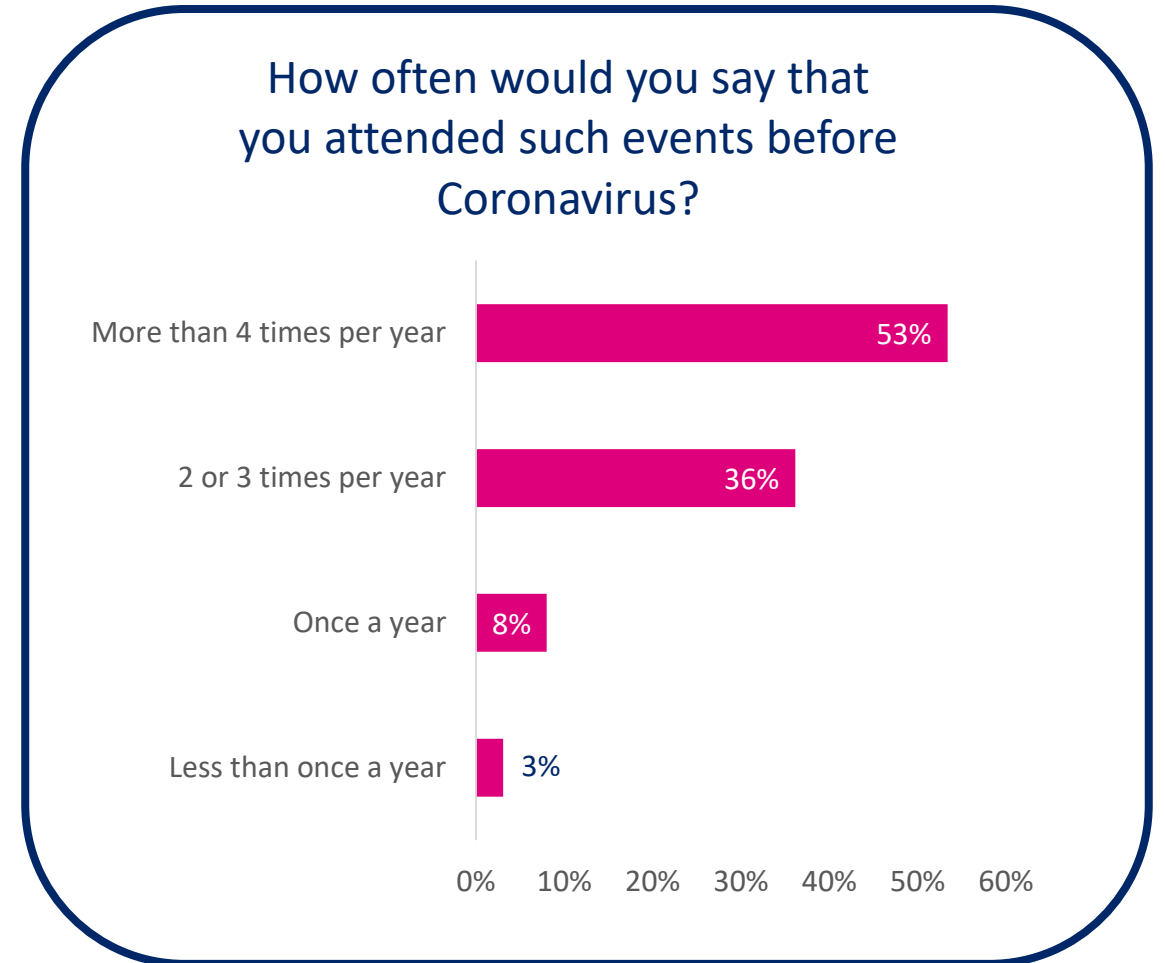
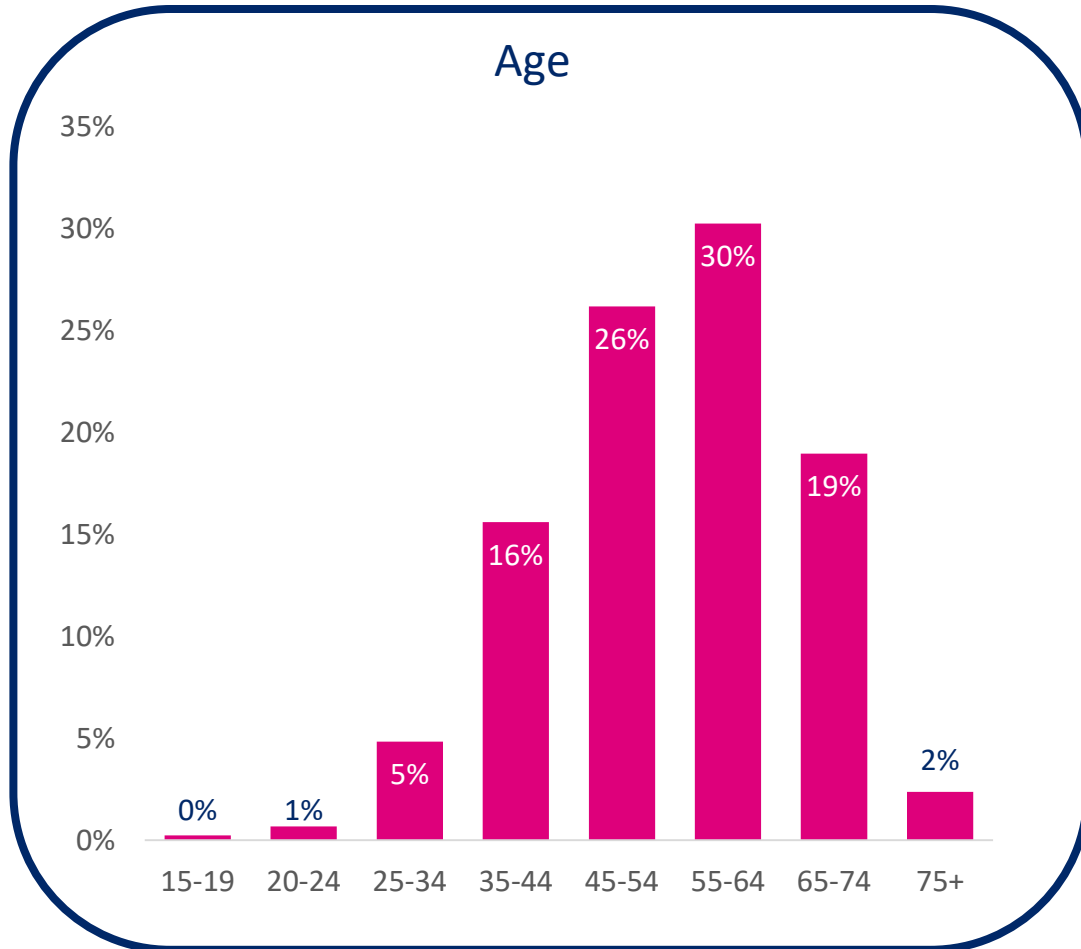
“Am missing going to events, but would have to be happy with safety before attending, thus **keen on outdoor type events.**”

“Online events are something I would consider for a **short performance** only. I would prefer to go to a venue, either indoors or outdoors.”

“I was interested in online events previously but they were not available at that time and now they are but **I would prefer a mix** because the online doesn't suit every event eg certain instrumental events. Mentioning theatre in particular, **going to the theatre is the whole point, it's so special,** different from cinema...”

What do our attenders look like?

More than half of cultural audiences responding to the survey are aged 55+. Respondents were also more likely to be very engaged, having attended live cultural events more than four times in the past year.





While 16% have a disability, nearly twice as many people consider themselves vulnerable to Covid

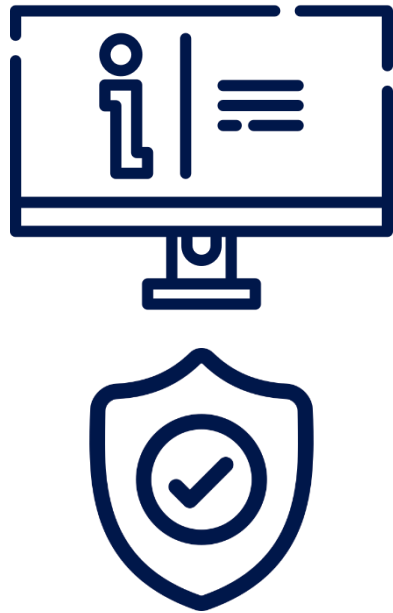


There were some similarities in the responses among disabled and vulnerable audiences:

- They attend live cultural events **less often** than the average attender
- They are less likely to have engaged with cultural events online or outdoors
- Approximately 50% of both groups **would still consider attending live cultural events** if they were confident that social distancing and hygiene measures were put in place

**This is positive -**  
it means they **WILL** attend,  
but may have specific needs  
that organisations will need  
to be mindful of

Vulnerable attenders are more likely to want:



- **More information and assurances regarding hygiene.** They are more likely to want hand sanitiser available, and want to see information on cleaning procedures and a kite mark.
- They are more keen that staff and audiences wear **masks**
- They are also more likely to belong to an older age group (65-74)

Disabled attenders are more likely to want:



- **Refunds** if they or someone in their party were unwell/unable to attend
- **No restrictions** on toilet facilities

Disabled audiences were asked specifics about what was most important to them when returning to live cultural events.

Here are their top answers:



**Priority access for disabled patrons if a queue management system is employed**

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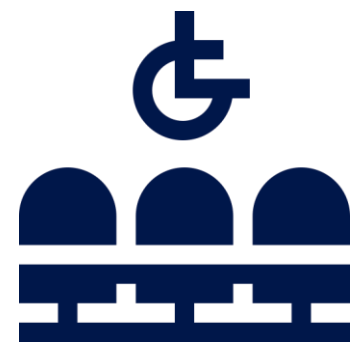
Some audiences have difficulty standing/walking for long periods of time. This includes the elderly, those with mobility issues, and those with ASD



**Confidence that accessible toilet facilities will still be available**

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“Toileting facilities are an essential, not a luxury”



**Confidence that accessible seating will be included in social distancing arrangements**

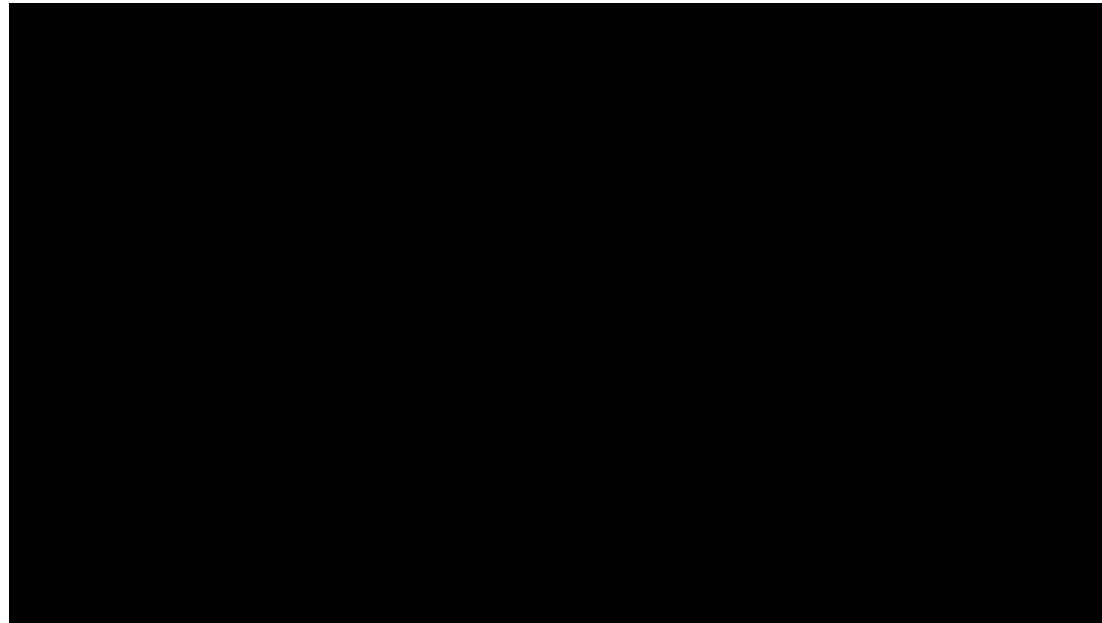
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This includes catering to different needs – remember that not all disabilities are visible

Key messages

## Key messages:

- People are open to returning to live events but not yet
- Public health still a major issue for our audiences
- Increasing importance of:
  - 1.) Communications – what have we been doing, what are we working on and then clear communication when we re-open. Example:  
<https://www.youtube.com/watch?v=RtKEp4qwSq8&feature=youtu.be>



- 2.) Keep talking to audiences – what would you like thrive to help you look at next

# wewillthrive.co.uk

For queries about this project, please contact  
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