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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Co-founder and Partner
www.indigo-ltd.com
# Findings At A Glance

## Audience responses (86K)

<table>
<thead>
<tr>
<th>Topic</th>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>During Lockdown</td>
<td>93%</td>
<td>of respondents say they are missing attending live events at the moment</td>
</tr>
<tr>
<td>Booking NOW for events</td>
<td>Only 17%</td>
<td>of respondents are booking for events</td>
</tr>
<tr>
<td>When will Audiences Return?</td>
<td>Only 19%</td>
<td>would return to attending events just because venues re-open</td>
</tr>
<tr>
<td>Safety &amp; Comfort</td>
<td>¾</td>
<td>Would feel safer with some form of social distancing measures</td>
</tr>
</tbody>
</table>

## Organisations (192)

<table>
<thead>
<tr>
<th>Topic</th>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>74%</td>
<td>want to get back to the BUZZ OF A LIVE EVENT</td>
</tr>
<tr>
<td></td>
<td>55%</td>
<td>Look forward to SUPPORTING their LOCAL VENUE</td>
</tr>
<tr>
<td></td>
<td>41%</td>
<td>would not consider booking for events for at least 4 months</td>
</tr>
<tr>
<td></td>
<td>Avoiding queues Limiting attendance numbers Seats spaced &gt;2m apart</td>
<td></td>
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</tbody>
</table>
Context
The UK population went into ‘lockdown’ in response 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\(^1\) and frequent\(^2\) attenders 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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\(^1\) 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.

### Responses by region

<table>
<thead>
<tr>
<th>Region</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>78%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>7%</td>
</tr>
<tr>
<td>East</td>
<td>9%</td>
</tr>
<tr>
<td>London</td>
<td>10%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>5%</td>
</tr>
<tr>
<td>North East</td>
<td>5%</td>
</tr>
<tr>
<td>North</td>
<td>7%</td>
</tr>
<tr>
<td>North West</td>
<td>18%</td>
</tr>
<tr>
<td>South East</td>
<td>4%</td>
</tr>
<tr>
<td>South West</td>
<td>4%</td>
</tr>
<tr>
<td>South</td>
<td>9%</td>
</tr>
<tr>
<td>Wales</td>
<td>11%</td>
</tr>
<tr>
<td>Scotland</td>
<td>8%</td>
</tr>
<tr>
<td>Touring</td>
<td>2%</td>
</tr>
<tr>
<td>Ireland</td>
<td>1%</td>
</tr>
</tbody>
</table>

### Responses by organisation type

<table>
<thead>
<tr>
<th>Organisation Type</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orchestra</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
<tr>
<td>Ballet or Opera Company</td>
<td>5%</td>
</tr>
<tr>
<td>Concert Venue</td>
<td>15%</td>
</tr>
<tr>
<td>Arts Centre</td>
<td>28%</td>
</tr>
<tr>
<td>Theatre</td>
<td>47%</td>
</tr>
</tbody>
</table>

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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

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes - a lot</td>
<td>60%</td>
</tr>
<tr>
<td>Somewhat</td>
<td>33%</td>
</tr>
<tr>
<td>Not really</td>
<td>6%</td>
</tr>
<tr>
<td>Not at all</td>
<td>1%</td>
</tr>
</tbody>
</table>

Q: What are you **most looking forward** to about attending events again in the future?
Responses: 79,042

- The ‘buzz’ of being at a live event: 74%
- Seeing performers I know and/or admire in the flesh: 67%
- Having something special to look forward to: 66%
- Supporting my local venue: 55%
- Quality time in the company of family and friends: 51%
- The shared experience in the auditorium: 47%
- Making a night of it - ‘dinner and a show’: 37%
- Being in an audience of like-minded people: 31%

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

Q: When are the events that you are booking for scheduled to take place?
Responses: 14,015

<table>
<thead>
<tr>
<th>Month</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 2020</td>
<td>4%</td>
</tr>
<tr>
<td>July</td>
<td>5%</td>
</tr>
<tr>
<td>August</td>
<td>6%</td>
</tr>
<tr>
<td>September/October</td>
<td>35%</td>
</tr>
<tr>
<td>November/December</td>
<td>24%</td>
</tr>
<tr>
<td>January 2021 onwards</td>
<td>26%</td>
</tr>
</tbody>
</table>

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*

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>within the next month</td>
<td>6%</td>
</tr>
<tr>
<td>1-2 months from now</td>
<td>24%</td>
</tr>
<tr>
<td>3-4 months from now</td>
<td>29%</td>
</tr>
<tr>
<td>4-6 months from now</td>
<td>16%</td>
</tr>
<tr>
<td>6-12 months from now</td>
<td>20%</td>
</tr>
<tr>
<td>Over a year from now</td>
<td>5%</td>
</tr>
</tbody>
</table>

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*

- I will feel comfortable to come to events again as soon as venues are allowed to reopen: 19%
- I can envisage a period when venues will be open again, but, IF ADVISED TO, I will stay away from large gatherings in…: 52%
- I can envisage a period when venues will be open again, but I WOULD PREFER to stay away from large gatherings in…: 28%

Only 14% >65s would return to attending events just because venues reopen

19% <35s would return to attending events just because venues reopen

26%
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

- Seeing others visit: 10%
- Availability of hand sanitiser: 58%
- Avoiding long queues of people: 72%
- Limits on the number who can attend: 76%
- On-site health monitoring (e.g., taking temperature): 39%
- Knowing venue-cleaning procedures: 48%
- Seats spaced at least 2m apart: 65%

Q: Are there certain types of venues that you would feel happier coming back to before others?  
Responses: 62,952

Large outdoor event: 49
Medium / Large seated venue: 47
Small studio theatre / chamber music venue: 42
Pub / community venue: 35
Large standing venue: 30

Less comfortable

More comfortable

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

- The ability to receive a full refund should the event be cancelled: 82
- The ability to receive a credit to use on future events if I am unwell or unable to attend an event: 74
- The flexibility to exchange any tickets for another event if I am unwell or unable to attend: 75

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: 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**

**79%**
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**

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Support Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increasing ticket prices</td>
<td>18%</td>
</tr>
<tr>
<td>Applying an additional ‘recovery fund’ levy per ticket</td>
<td>30%</td>
</tr>
<tr>
<td>Applying an additional ‘recovery fund’ levy per booking</td>
<td>36%</td>
</tr>
<tr>
<td>Giving you the option to donate an amount of your choice to a ‘recovery fund’ when buying tickets</td>
<td>79%</td>
</tr>
<tr>
<td>Enabling people who can’t now afford to come to access tickets</td>
<td>52%</td>
</tr>
<tr>
<td>Health and Wellbeing</td>
<td>32%</td>
</tr>
<tr>
<td>Enabling ‘vulnerable’ people to bring a friend when they feel able to return to the venue safely</td>
<td>42%</td>
</tr>
<tr>
<td>Bringing culture to more people via digital channels</td>
<td>42%</td>
</tr>
<tr>
<td>Celebrating Health and Care workers who have put themselves at risk in treating Covid-19 patients</td>
<td>55%</td>
</tr>
<tr>
<td>Education and skills development</td>
<td>28%</td>
</tr>
<tr>
<td>Celebrating interaction between people of all ages</td>
<td>34%</td>
</tr>
</tbody>
</table>
Section 3. Key metrics compared

We have compared the following 4 key metrics:
- % of respondents actively booking for events now, and of those
  - % booking for events not before 2021
- Of those NOT actively booking
  - % 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 respondents actively booking now

- WEEK TO 22/4: 17%
- WEEK TO 29/4: 7%
- WEEK TO 6/5: 16%

% of bookers NOT booking for events before 2021

- WEEK TO 22/4: 22%
- WEEK TO 29/4: 26%
- WEEK TO 6/5: 28%

% 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

Concert Venues and Theatres have the highest proportion 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

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
- ImmersivelDN
- intodBodmin
- Jermyrn 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
- Strøde 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
- York Theatre Royal
- Z-arts

**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
- 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
- Óíontas 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