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 2 | 7-27 May 2020

Katy Raines
Co-founder and Partner
www.indigo-ltd.com
Contents

Context ........................................................................................................................................ 4
Section 1: Methodology and Sample ..................................................................................... 5
  Sample breakdown .................................................................................................................. 6
Section 2: Overall findings ..................................................................................................... 7
  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
Appendix 1: About Indigo-Ltd .............................................................................................. 14
Appendix 2: Participating Organisations .............................................................................. 15
**Findings At A Glance**

**137K**

Audience responses

- **During Lockdown**
  - 94% of respondents say they are **missing** attending live events at the moment

- **Booking NOW for events**
  - Only 16% of respondents are booking for events

- **When will Audiences Return?**
  - Only 19% would return to attending events just because venues reopen

- **Safety & Comfort**
  - ¾ Would feel safer with some form of social distancing measures

- **Organisations**
  - 317
  - 74% want to get back to the **BUZZ OF A LIVE EVENT**
  - 57% Look forward to **SUPPORTING** their **LOCAL VENUE**

- **When will Audiences Return?**
  - Only 19% would return to attending events just because venues re-open

- **When will Audiences Return?**
  - Only 19% would return to attending events just because venues re-open

- **Safety & Comfort**
  - ¾ Would feel safer with some form of social distancing measures

- **Avoiding queues**
  - Limiting attendance numbers
  - Seats spaced >2m apart

---

*After the Interval Wave 2 Report June 2020 © Indigo-Ltd*
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
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 (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.

---

\(^1\) Recent: have attended an event in the last 2 years  
\(^2\) 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

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>74%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>7%</td>
</tr>
<tr>
<td>East</td>
<td>10%</td>
</tr>
<tr>
<td>London</td>
<td>9%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>3%</td>
</tr>
<tr>
<td>North East</td>
<td>5%</td>
</tr>
<tr>
<td>North</td>
<td>6%</td>
</tr>
<tr>
<td>North West</td>
<td>14%</td>
</tr>
<tr>
<td>South East</td>
<td>5%</td>
</tr>
<tr>
<td>South West</td>
<td>6%</td>
</tr>
<tr>
<td>South</td>
<td>9%</td>
</tr>
<tr>
<td>Wales</td>
<td>8%</td>
</tr>
<tr>
<td>Scotland</td>
<td>10%</td>
</tr>
<tr>
<td>Touring</td>
<td>2%</td>
</tr>
<tr>
<td>Ireland</td>
<td>6%</td>
</tr>
</tbody>
</table>

### Responses by organisation type

<table>
<thead>
<tr>
<th>Organisation Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orchestra</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
<tr>
<td>Ballet or Opera Company</td>
<td>3%</td>
</tr>
<tr>
<td>Concert Venue</td>
<td>5%</td>
</tr>
<tr>
<td>Arts Centre</td>
<td>30%</td>
</tr>
<tr>
<td>Theatre</td>
<td>46%</td>
</tr>
</tbody>
</table>

---

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: 50,523

94% of respondents say they are missing attending live events at the moment

<table>
<thead>
<tr>
<th></th>
<th>Wave 1</th>
<th>Wave 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes - a lot</td>
<td>60%</td>
<td>62%</td>
</tr>
<tr>
<td>Somewhat</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Not really</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Not at all</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th></th>
<th>Wave 1</th>
<th>Wave 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>No</td>
<td>83%</td>
<td>85%</td>
</tr>
</tbody>
</table>

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

After the Interval Wave 2 Report June 2020 © Indigo-Ltd
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*

- **6%** within the next month
- **24%** 1-2 months from now
- **21%** 3-4 months from now
- **16%** 4-6 months from now
- **20%** 6-12 months from now
- **21%** Over a year from now

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*

- I will feel comfortable to come to events again as soon as venues are allowed to reopen: **19%** (Wave 1) **19%** (Wave 2)
- I can envisage a period when venues will be open again, but, IF ADVISED TO, I will stay away from large gatherings in order to protect myself: **52%** (Wave 1) **46%** (Wave 2)
- I can envisage a period when venues will be open again, but I WOULD PREFER to stay away from large gatherings in order to protect myself: **28%** (Wave 1) **34%** (Wave 2)

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*

- The ability to receive a full refund should the event be cancelled
  - Wave 1: 82%
  - Wave 2: 79%

- The ability to receive a credit to use on future events if I am unwell or unable to attend an event
  - Wave 1: 74%
  - Wave 2: 71%

- The flexibility to exchange any tickets for another event if I am unwell or unable to attend
  - Wave 1: 75%
  - Wave 2: 72%

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

- Enabling people who can't now afford to come to access tickets
  - Health and Wellbeing
  - Enabling 'vulnerable' people to bring a friend when they feel able to return to the venue safely
  - Bringing culture to more people via digital channels
  - Celebrating Health and Care workers who have put themselves at risk in treating Covid-19 patients
  - Education and skills development
  - Celebrating interaction between people of all ages

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
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.
### England

- a space arts
- ADC Theatre
- Alarum Productions
- Alnwick Playhouse
- Anvil Arts
- APEX Bury St Edmunds
- Arcola
- Arts at the Old Fire Station
- Arts Centre Washington
- Artsadmin
- artsdepot
- Ashgate Heritage Arts
- CIC
- Babylon ARTS
- Barbican
- Ashcroft Arts Centre
- Bath Box Office
- 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
- Bradford Theatres
- Brewery Arts
- Bridgewater Hall
- Brighton Dome and Brighton Festival
- Bristol Old Vic
- British Youth Music Theatre
- Britten Sinfonia
- Camberley Theatre
- Cambridge Live
- Camden People’s Theatre
- Carn to Cove
- Carriageworks Theatre
- Chichester Festival
- Churchill Theatre
- City of Birmingham Symphony Orchestra
- Clonter Opera Theatre
- Cockpit
- Colston Hall
- Consett Empire
- Cornerstone
- Courtyard Hereford
- Cousin Jack’s Theatre Company
- Cranleigh Arts
- Crewe Lyceum
- Criterion Theatre
- Curve
- DanceEast
- DanceGRiST
- Darlington Hippodrome
- Darwen Library Theatre
- De Montfort Hall
- Derby LIVE
- Derby Theatre
- Diverse City
- Dorking Halls
- EM Forster Theatre
- English Folk Expo
- English National Ballet
- English National Opera
- English Touring Opera
- Ex Cathedra
- Exeter Northcott Theatre
- Family Arts Campaign
- Farnham Maltings
- Festival of Ideas
- Five Star Theatre
- Forest Arts Centre
- Forest Forge Theatre
- Fringe TheatreFest
- Fuel
- Fulham Opera
- G Live
- Gala
- GlassBox Theatre
- Guildford Shakespeare Company
- Gulbenkian, University of Kent
- Hanger Farm Arts Centre
- Harlow Playhouse
- Harrogate International Festivals
- Harrogate Theatre
- Haverhill Arts Centre
- Hertford Theatre
- Highlights Rural Touring
- HOME Manchester
- Hull Theatres
- Hull Truck Theatre
- ImmersiveLDN
- Ipswich Regent Theatre
- Jermy Street Theatre
- King George’s Hall
- Kirkgate Arts
- Lakeside Arts
- Leeds Grand Theatre & Company
- Leeds International Concert Season
- Leeds Playhouse
- Leeds Town Hall
- Leicester Square Theatre
- Lichfield Garrick
- Lighthouse, Poole’s Centre for the Arts
- Lincoln Performing Arts Centre
- Little Angel Theatre
- Liverpool Everyman and Playhouse
- London International Festival of Theatre LIFT
- London International Mime Festival
- London Mozart Players
- London Philharmonic Orchestra
- London Short Film Festival
- London Symphony Orchestra
- Long Division
- MAC Birmingham
- Manchester Chamber
- Concerts Society
- Manchester International Festival
- Mayflower Southampton
- MAYK
- Mercury Theatre
- Colchester
- MGS04 Epsom and Ewell Arts Festival
- Middlesbrough Theatre
- Middlesbrough Town Hall
- Museum of Comedy
- Music Venue Trust
- Nevill Holt Opera
- New Theatre Royal Portsmouth
- New Vic Theatre
- New Writing North
- Newbury Spring Festival
- Newcastle Theatre Royal
- Nonsuch Studios
- Northern Broadsides Theatre Company
- Northern Chamber Orchestra
- Northern Stage
- Nottingham Playhouse
- Nuffield Southampton Theatres
- Octagon Theatre Bolton
- Off West End
- Oldham Coliseum
- Opera Holland Park
- Opera North
- Orchard Theatre
- Orchestra of the Swan
- Oxford Playhouse
- Palace Theatre Paimnton
- Pegasus Theatre
- Penlee Park Open Air Theatre
- Peoples Theatre Arts Group
- Philharmonia
- Phoenix Theatre
- Pocklington Arts Centre
- Prism Arts
- Proteus
- Queen’s Hall Arts, Hexham
- Red Ladder Theatre Company
- Regent Centre
- Christchurch
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
Sterts 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)
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
Wiltons Music Hall
Wiltshire Creative
Wiltshire Music Centre
Wise Children
Wokingham Festival
Wokingham Music Club
Wycombe Swan
Wyvern Theatre
Yardley, YMCA Theatre
York Theatre Royal
Z-arts

Wales
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

Scotland
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
Lyeum 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

Ireland (NI and ROI)
Accidental Theatre
Ards Arts Centre
Belfast Mela
Belfast Philharmonic Society
City of Derry International Choir Festival
Crac Theatre
Cultúrlann Mc Adam Ó Fiach
Eastside Arts Festival
Glasgowbury
Iontas 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