



*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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# Contents

<b>Context .....</b>	<b>4</b>
<b>Section 1: Methodology and Sample .....</b>	<b>5</b>
Sample breakdown .....	6
<b>Section 2: Overall findings .....</b>	<b>7</b>
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
<b>Appendix 1: About Indigo-Ltd.....</b>	<b>14</b>
<b>Appendix 2: Participating Organisations .....</b>	<b>15</b>

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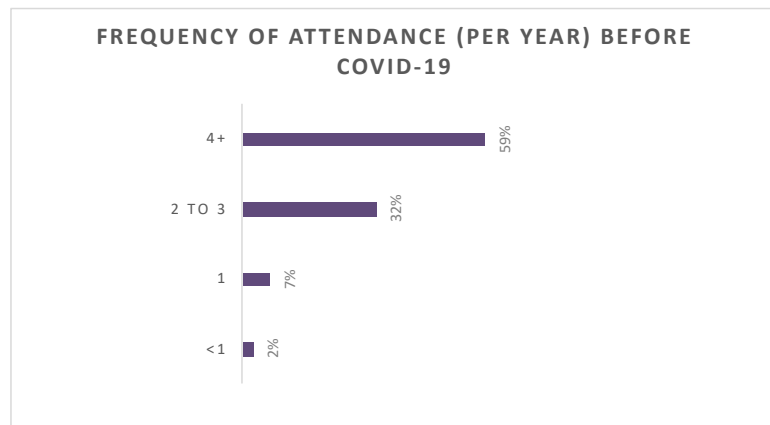
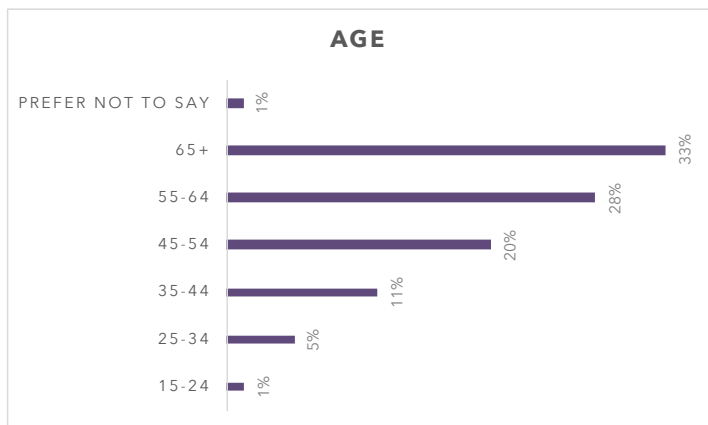
<sup>1</sup> Recent: have attended an event in the last 2 years

<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.

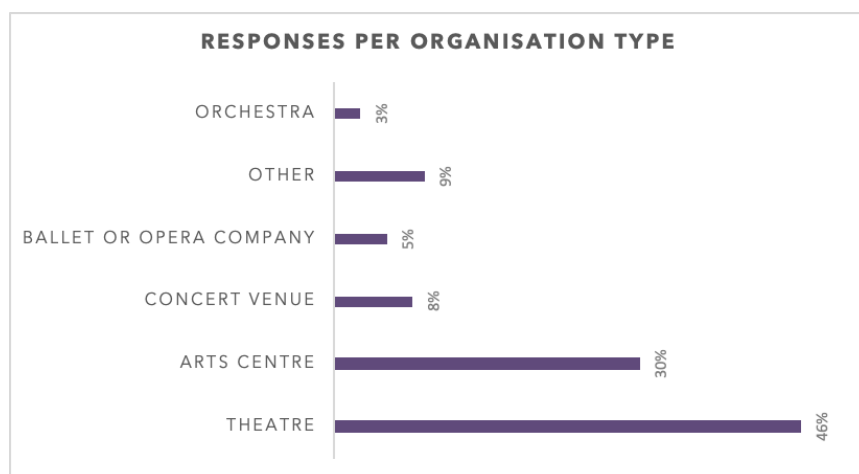


## Responses by region<sup>3</sup>

Region	Percentage
<b>England</b>	<b>74%</b>
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%

<b>Wales</b>	<b>8%</b>
<b>Scotland</b>	<b>10%</b>
<b>Touring</b>	<b>2%</b>
<b>Ireland</b>	<b>6%</b>

## 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?**

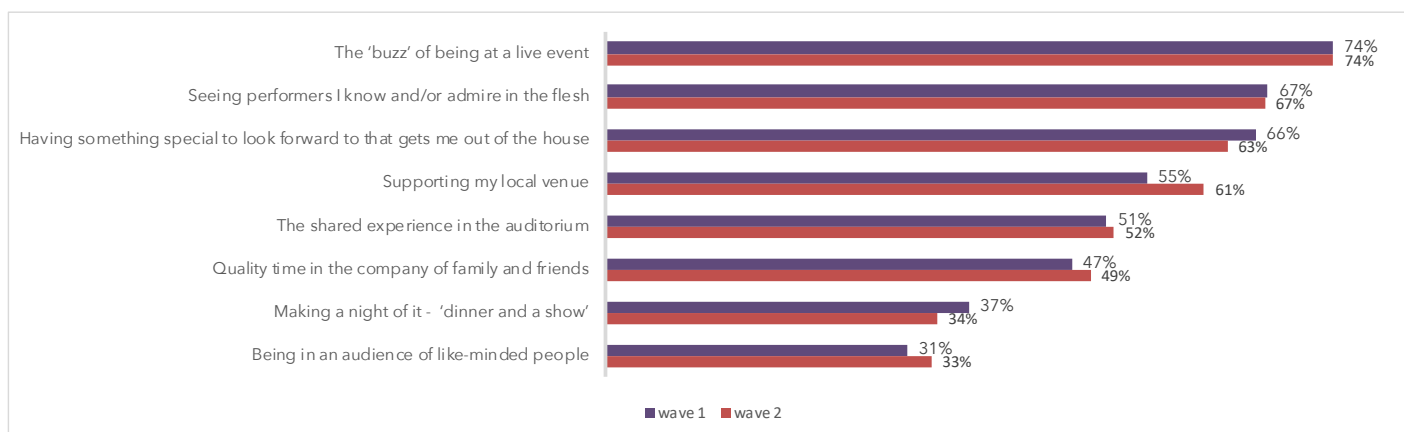
Responses: 50,523

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

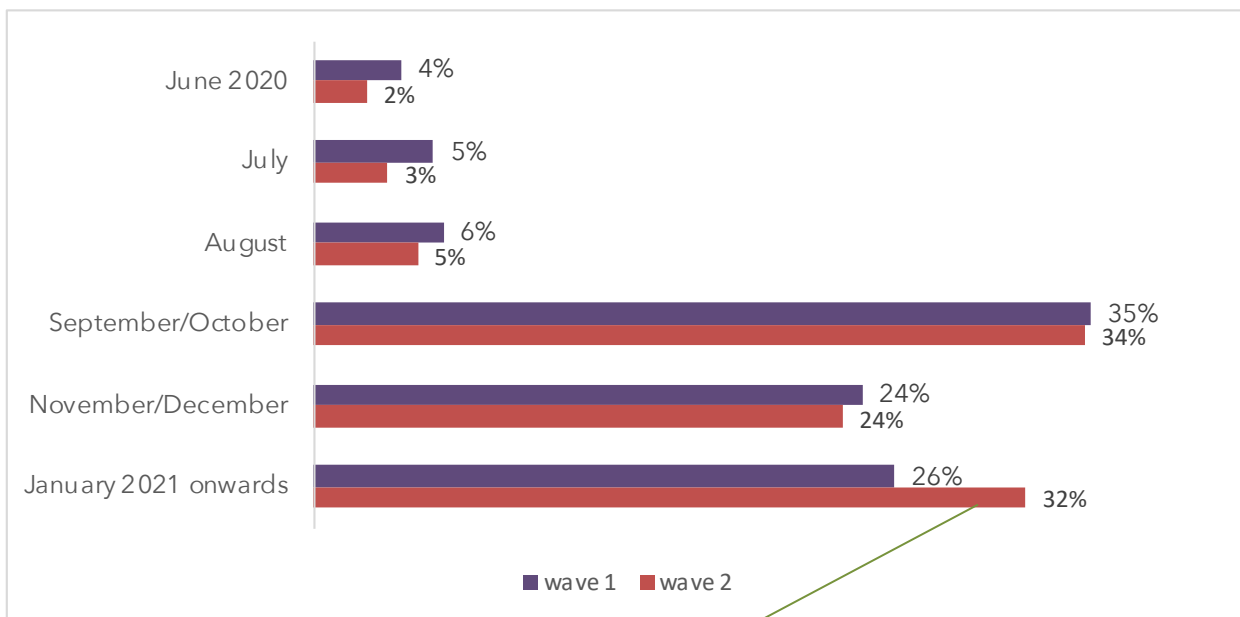
Only  
**15%**  
of respondents are booking for events

	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

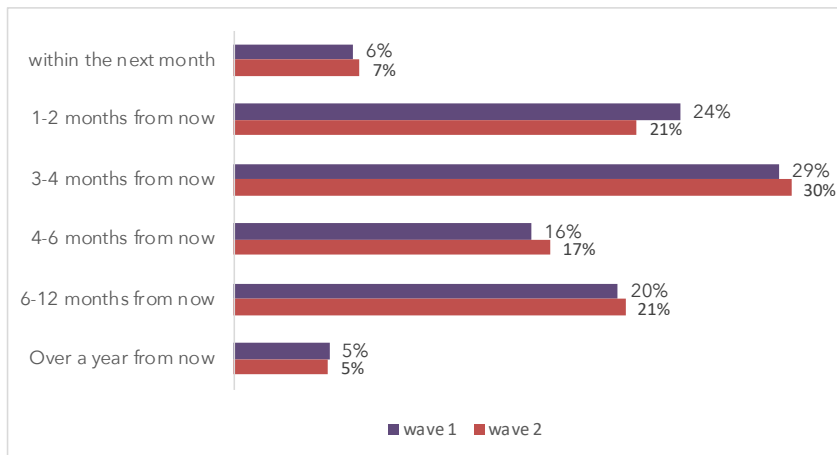


## 2.3 When will audiences return?

**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?

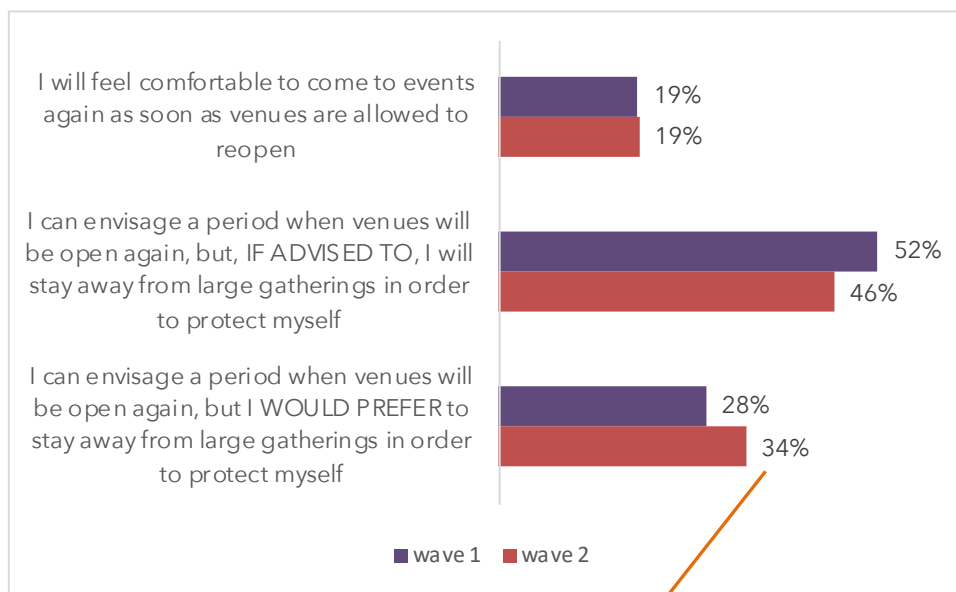
Responses: 41,129

**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

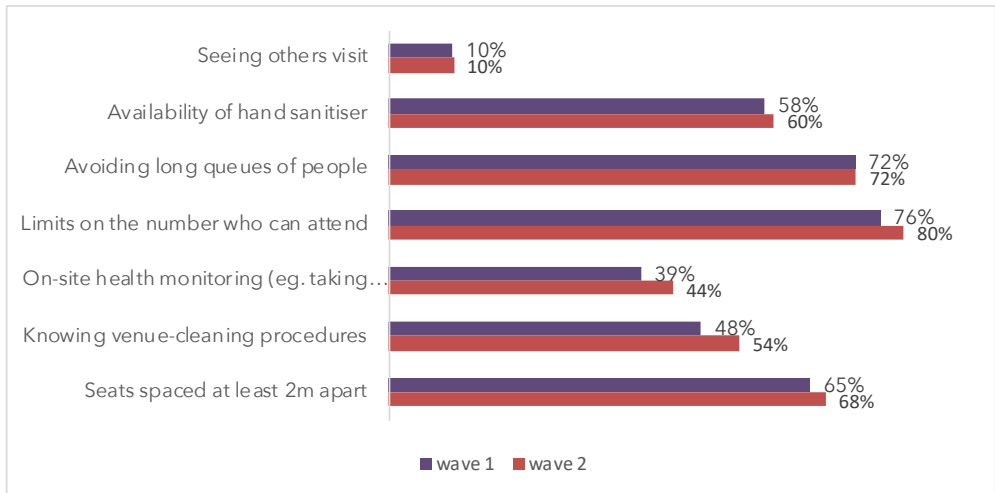
**Q:** Would any of the following help you to feel safe and comfortable going to an event at a venue again?

Responses: 31,623

80%

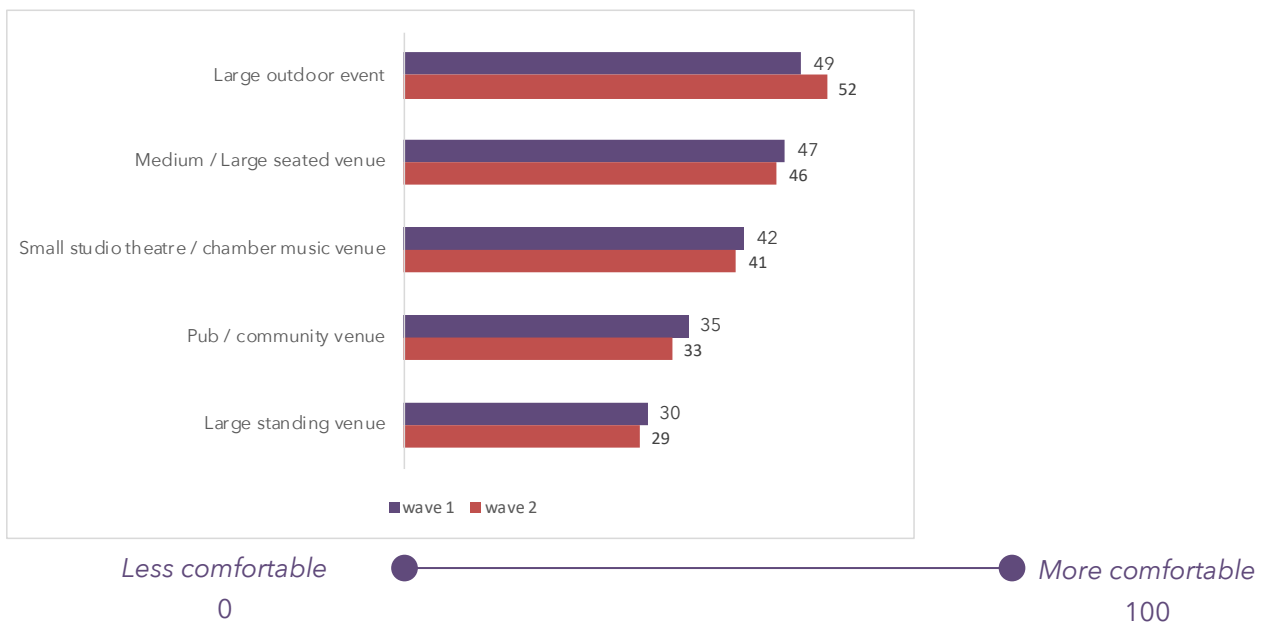
Would feel safer with some form of social distancing measures

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

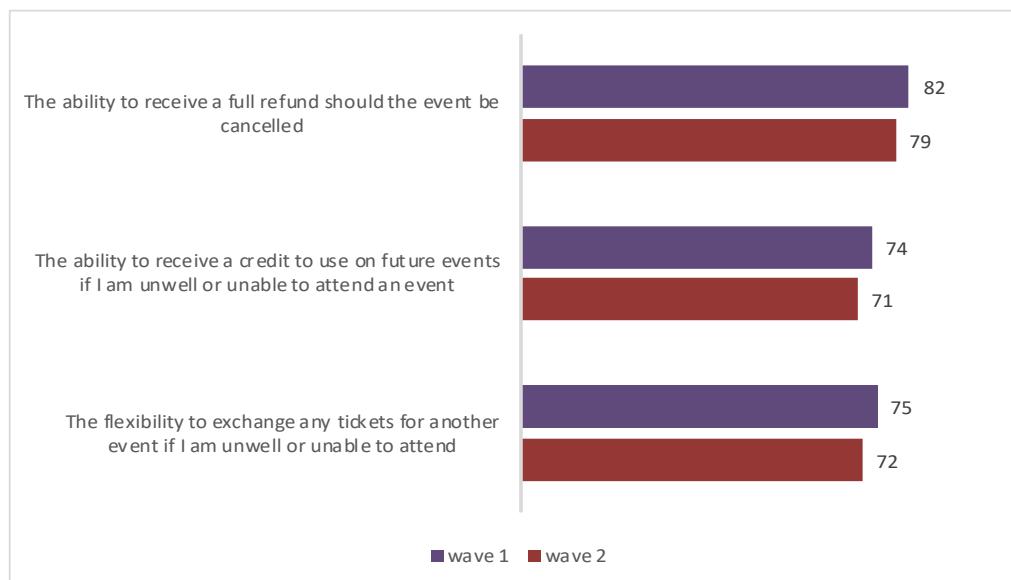


**LARGE OUTDOOR EVENTS**  
have become more attractive in wave 2

## 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

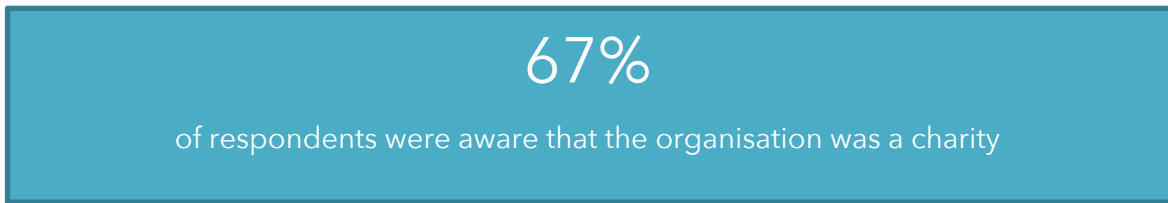
Responses: 39,137



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

## 2.6 Supporting Cultural Charities

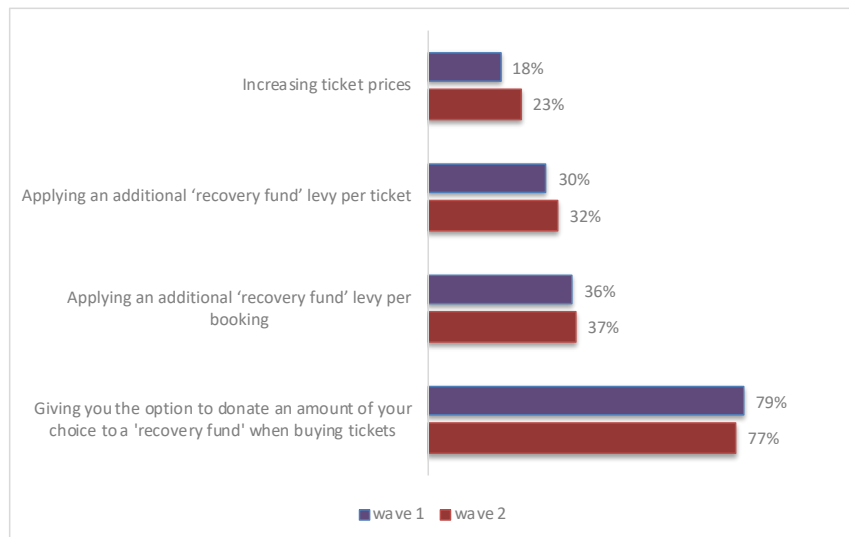
The following questions were only asked on the surveys sent out by Cultural charities.



Responses: 34,864

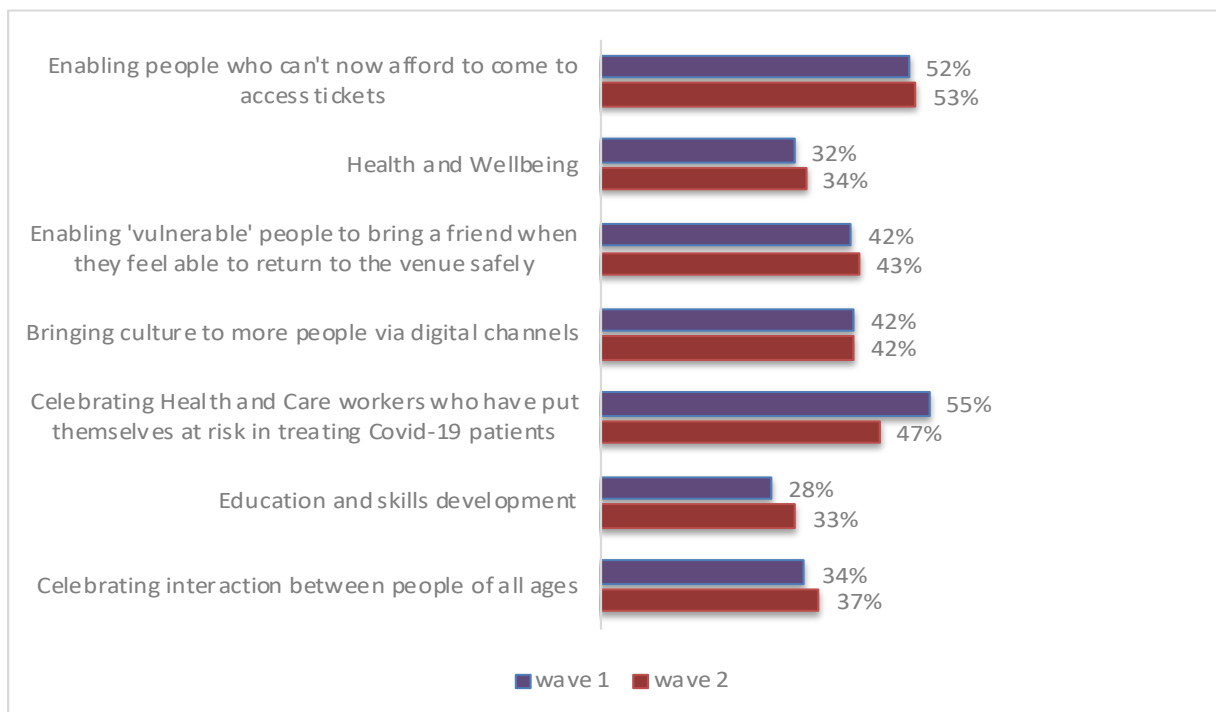
**Q:** When the organisation re-opens, their financial position may be challenging, and so may consider various options to ensure a successful re-opening. Please could you let us know which of these you would feel are most appropriate for cultural charities to consider?

Responses: 33,293



**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



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

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