



## **Act 2**

### National Audience Research

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*Audience views on booking tickets now, returning to live cultural events with social distancing, and experiencing culture in different formats.*

**Wave 2** | 22 June - 15 July 2020

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103K

Audience responses

Booking  
NOW for  
events

Only  
18%

of respondents are  
booking for events

Returning  
to events

66%

would consider attending  
events if venues re-opened  
with social distancing

Safety &  
Comfort



Covid-safe 'kite mark'  
Households seated together  
Limited numbers  
Seat spacing



Masks for audiences  
Unallocated seating  
Restricted facilities  
Public transport

Digital  
Culture

84%

interested in culture online

> 1/2

would pay for it

Outdoor  
Culture

94%

Are interested in culture  
outdoors

> 3/4

would pay for it

Economic  
Viability

81%

Concern for survival of  
cultural organisations

Audiences expect to  
spend 4% more on  
culture

258

Organisations

> Half

of those booking are for events  
from NOVEMBER

69%

would not consider booking for  
events for **at least 3 months**

## Context

Following the UK lockdown on 23 March, Indigo ran a survey called 'After the Interval', from 16 April - 27 May, to help cultural organisations understand audience views on missing cultural events and returning to venues.

On 23 May the UK Government announced the return of some pupils to school on 1 June, but many cultural organisations involved in live performances were still unclear as to how and when venues could re-open, and how customer sentiment might change as society started to emerge from lockdown. Many were planning for a long closure, and considering creating content digitally, or outdoors. Others were planning to open when allowed, with social distancing in place.

There was therefore a need to understand the audience's views on coming back to venues who could open with social distancing, and also their appetite for consuming content digitally or outdoors, where that was not possible.

**Indigo** developed Act 2 in consultation with many of the organisations previously involved in After the Interval, and taking feedback on numerous webinars and facilitated online meetings. The survey was offered free to organisations in the UK.

Indigo provided 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.

We previously published an interim report 'wave 1' which covered 3 weeks from 1-21 June. This second report now shows findings for 22 June - 15 July.

**All results and reports for *After the Interval* and Act 2 are available on [www.indigo-ltd.com](http://www.indigo-ltd.com)**



Cyngor Celfyddydau Cymru  
Arts Council of Wales

With thanks to the Arts Council of Wales for funding the Welsh translation of Act 2.

*After the Interval* is also being operated in Italy with our partners [Il Rosetti](#), and *After the Interval* and Act 2 in Ireland (ROI and NI) by our partners [Thrive](#).

**We will continue to publish regular updates and observations on the findings of both surveys, as well as opportunities to get involved with future projects. 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 2,000-4,000 of their audience members inviting them to complete the survey via a link provided. Where possible, we encouraged organisations to send it to a sample of their recent and frequent attenders to build up a picture of engaged cultural audiences.

Responses were limited to 1,000 per organisation. Emails were sent out in waves and responses collected from 22 June - 15 July (3 weeks).

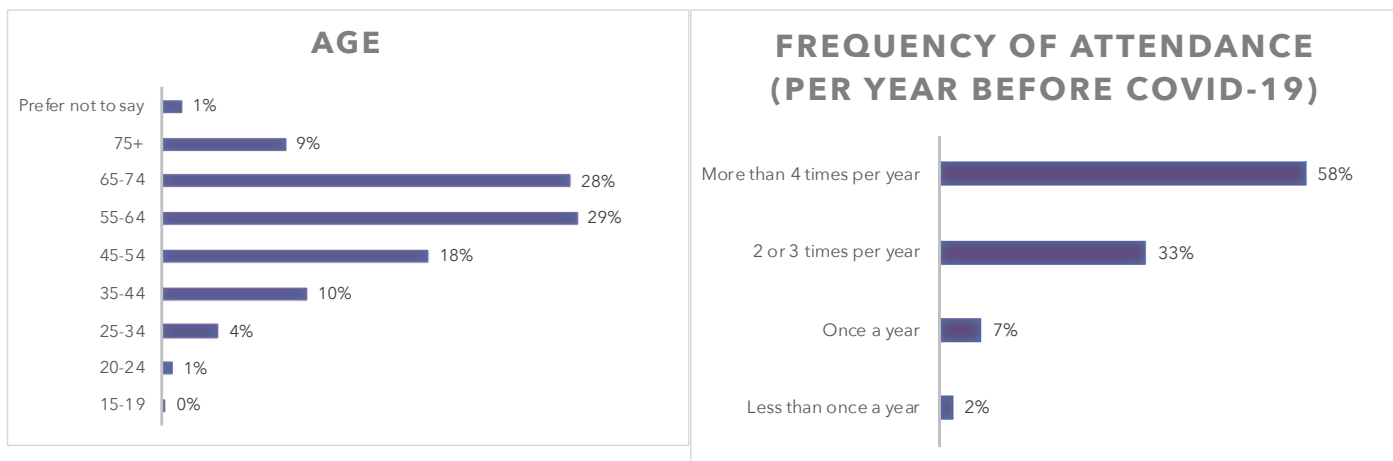
258 cultural organisations have participated in Act 2 to date, and these are listed in Appendix 2.

Over the 3-week period over 41,000 responses from audience members were received, and over 100,000 in total for the full 6 weeks.

## Sample breakdown

Responses: 40,787 (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.

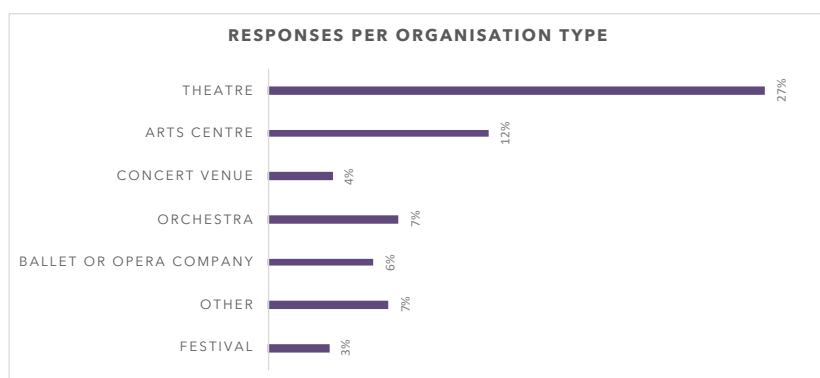


## Responses by region/country<sup>1</sup>

Region/Country	Percentage
<b>England</b>	<b>80%</b>
East Midlands	5%
East	10%
London	14%
West Midlands	10%
North East	5%
North	6%
North West	11%
South East	1%
South West	9%
South	10%

<b>Wales</b>	<b>7%</b>
<b>Scotland</b>	<b>13%</b>

## Responses by organisation type



<sup>1</sup> Region/Country = where participating organisation is based and/or primarily operates

## Section 2: Overall findings

### 2.1 Booking NOW for Events in the future

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

Responses: 40,895

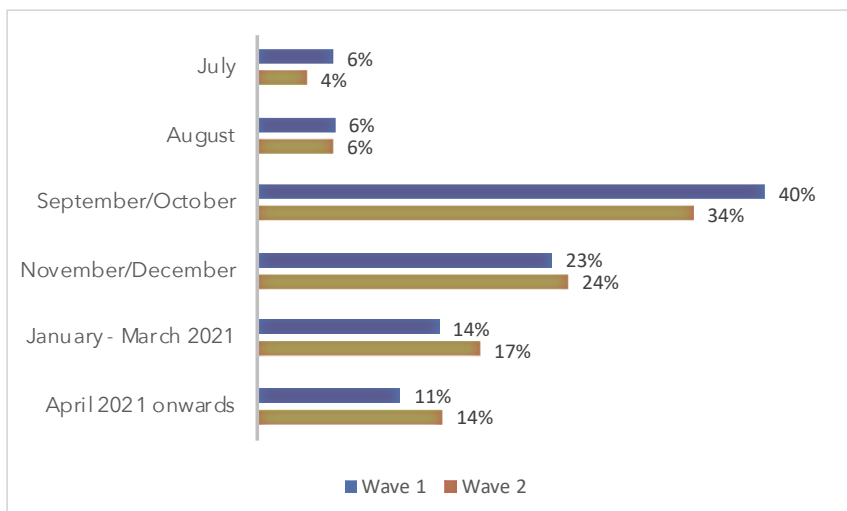
Only  
**20%**  
of respondents are booking for events

	Wave 1	Wave 2
Yes	17%	20%
No	83%	80%

There is a slight increase in the proportion of people actively booking tickets for future events.

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

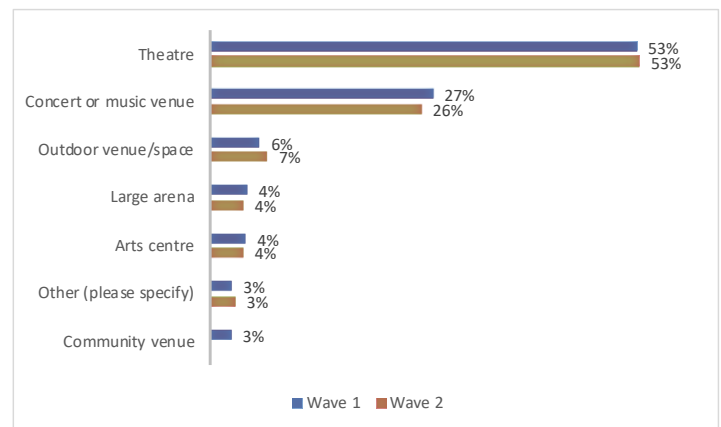
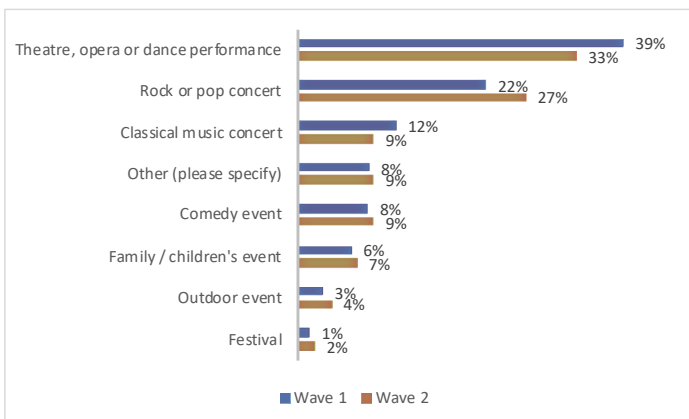
Responses: 7,489



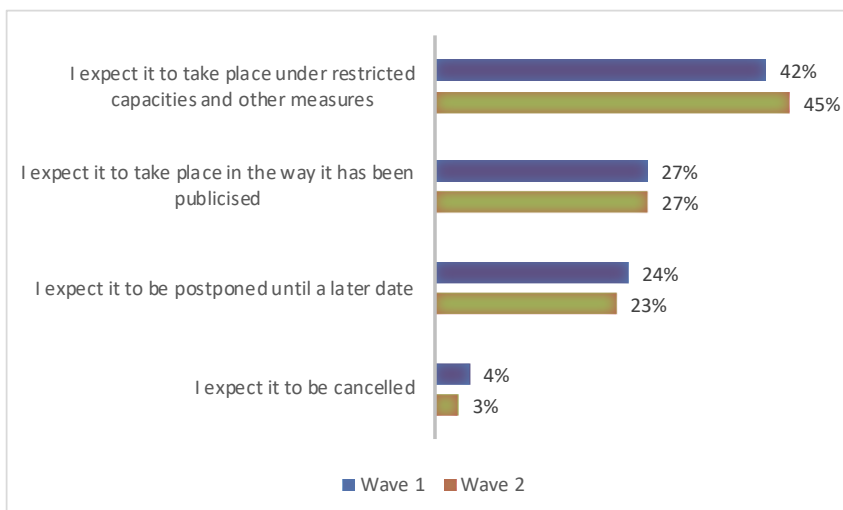
**> Half**  
of those booking are for events  
from NOVEMBER

Significantly fewer bookings are for events before November than in the first 3 weeks of the survey.

**Q:** Which of the following best describes the type of event it is / type of venue where the event will be held? Responses: 7,514



**Q:** What is your current expectation regarding this event? Responses: 7,494



**72%**  
Expect events they have booked for to go ahead

Slightly more people expect to see restrictions put in place on the events they have booked for



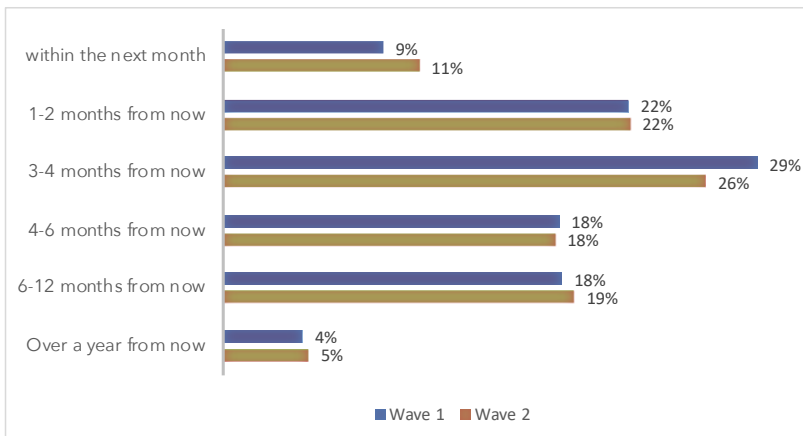
## 2.2 When and how will audiences return?

**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: 31,256

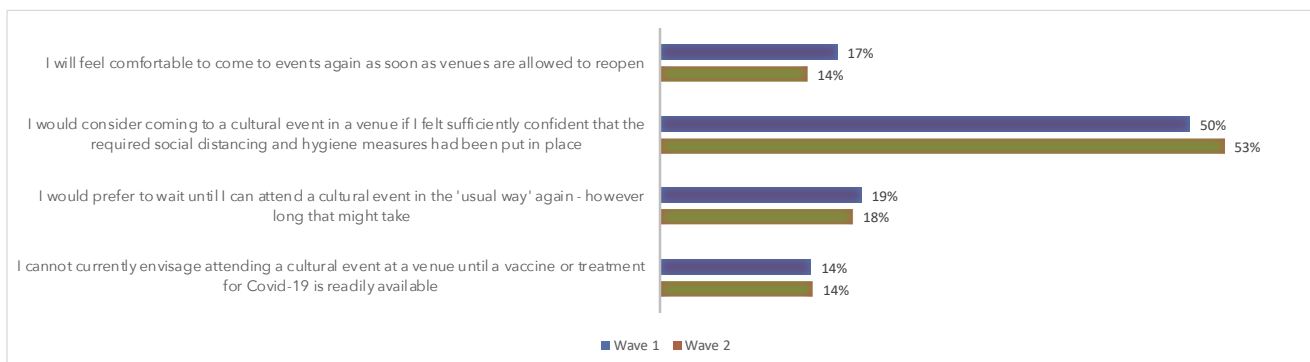
**67%**  
would not consider booking for events  
for **at least 3 months**

There is a small increase in the proportion willing to book within a month



**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?

Responses: 31,490



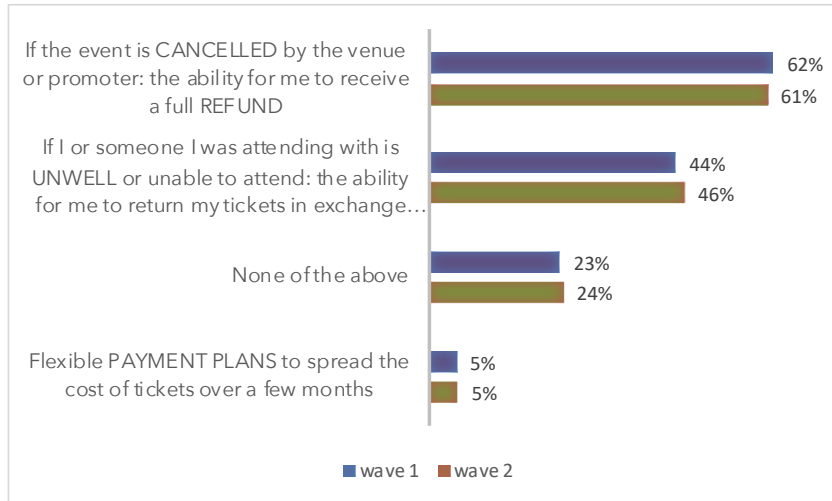
**ONLY**  
**14%**  
would come to venues as soon as  
they can re-open

**BUT**  
**67%**  
would consider attending events if  
venues re-opened with social  
distancing

[This has decreased in the last 3 weeks]

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

Responses: 49,508



## 2.3 Safety and Comfort

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

Responses: 27,300

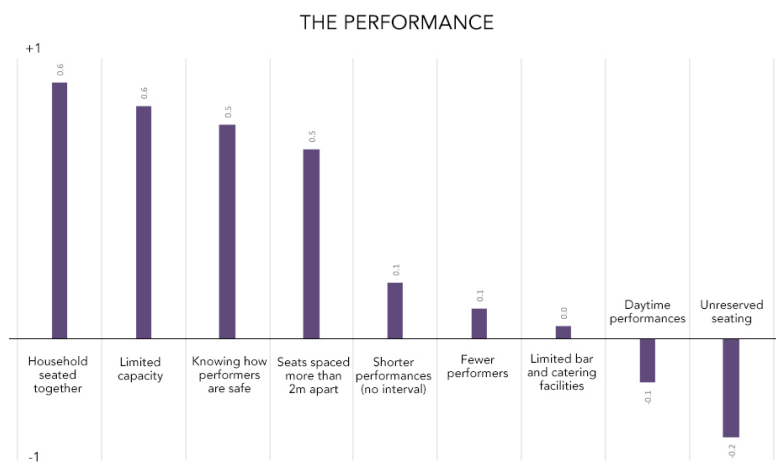
### MORE

Limited numbers, scheduled arrival  
Households seated together; seats distanced  
Hand sanitiser, Covid-safe 'kite-mark'

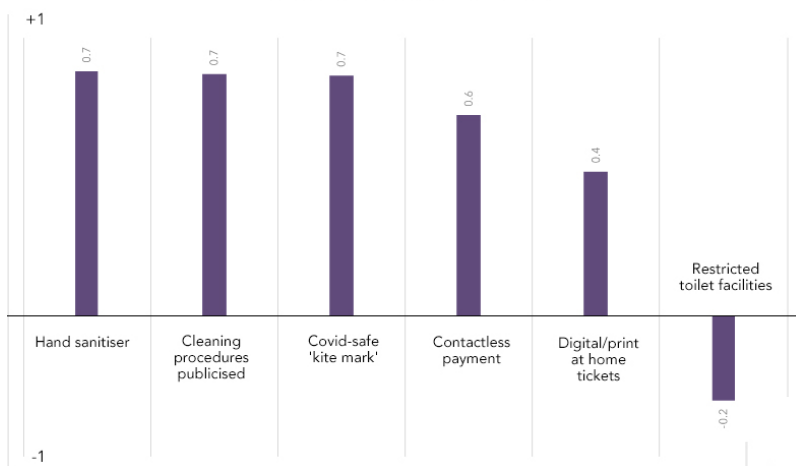
### LESS

Audiences wearing masks, public transport  
Daytime performances, unreserved seating  
Toilet facilities restricted

There have been NO significant changes between wave 1 and wave 2 in these findings

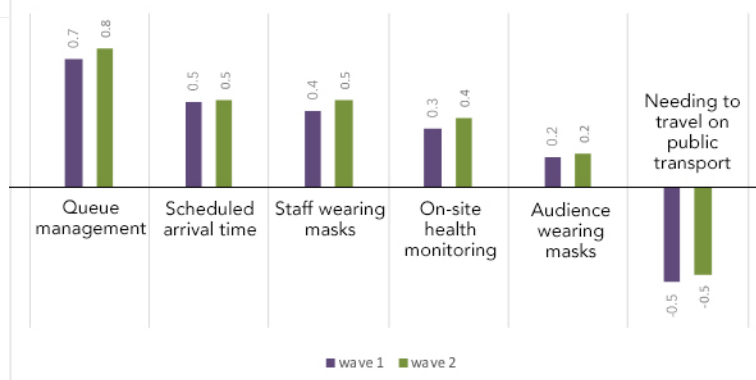


### HYGIENE AND CLEANING



Audiences are becoming slightly more likely to look for queue management, masks and on-site monitoring.

### AVOIDING CONTACT WITH PEOPLE

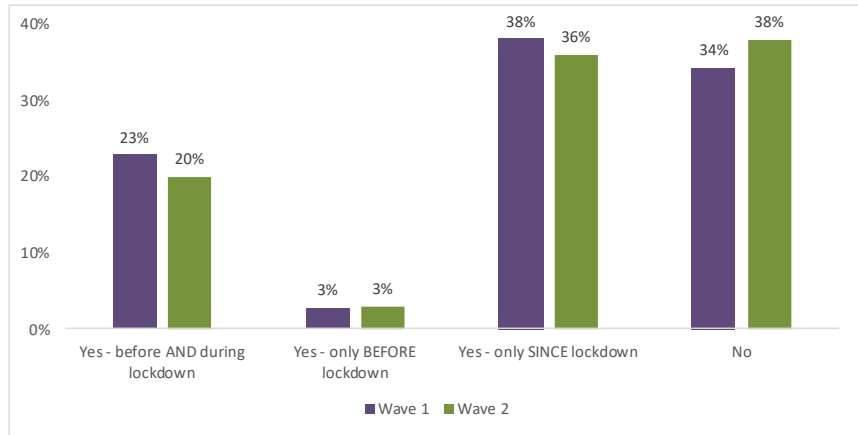


## 2.4 Experiencing culture digitally

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

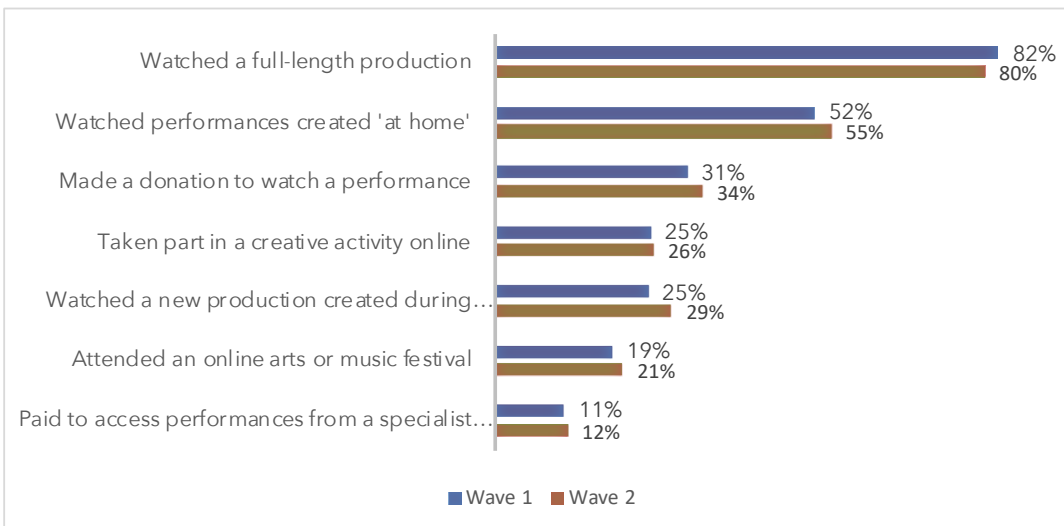
Responses: 37,290

**62%**  
Have already experienced culture online



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

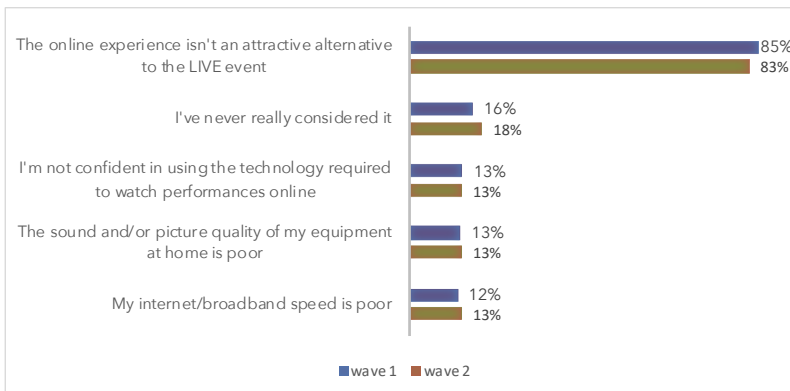
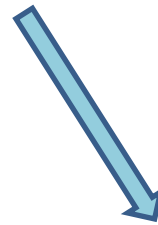
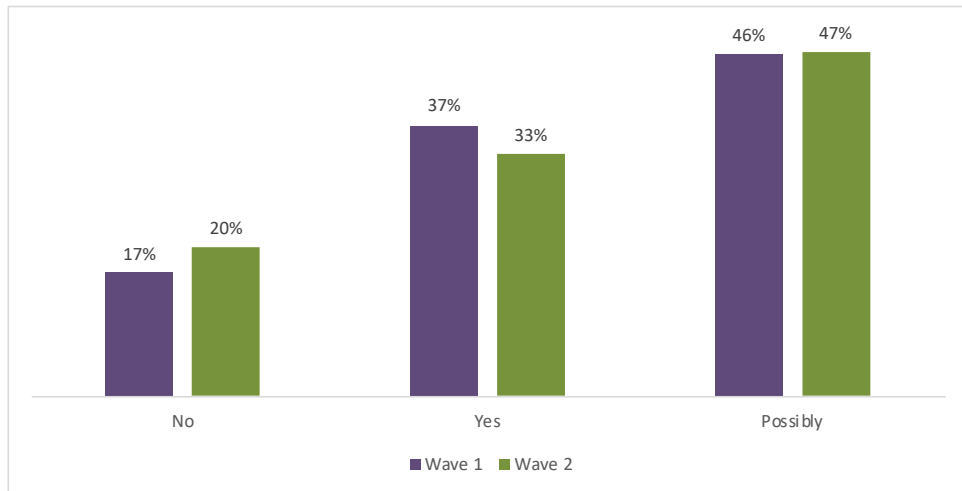
Responses: 20,852



**80%**  
Watched a full-length production

**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?

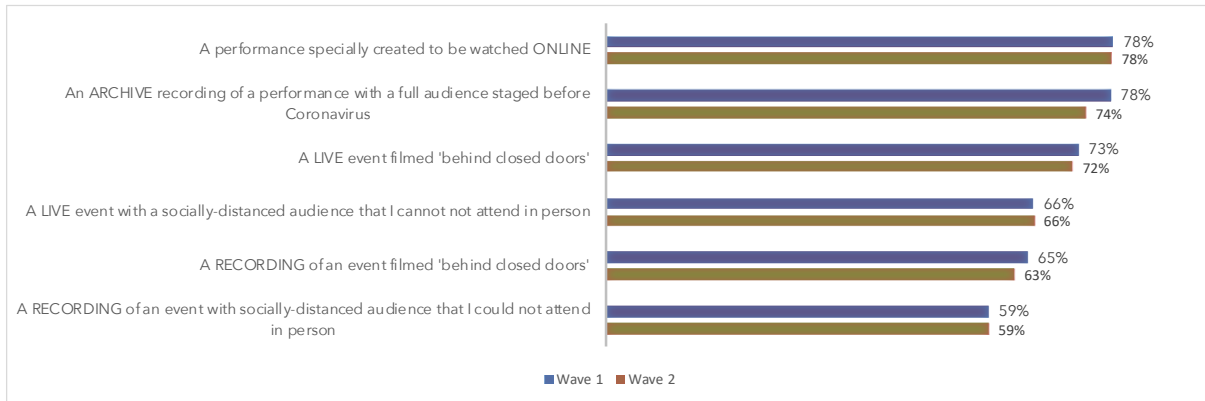
Responses: 36,990



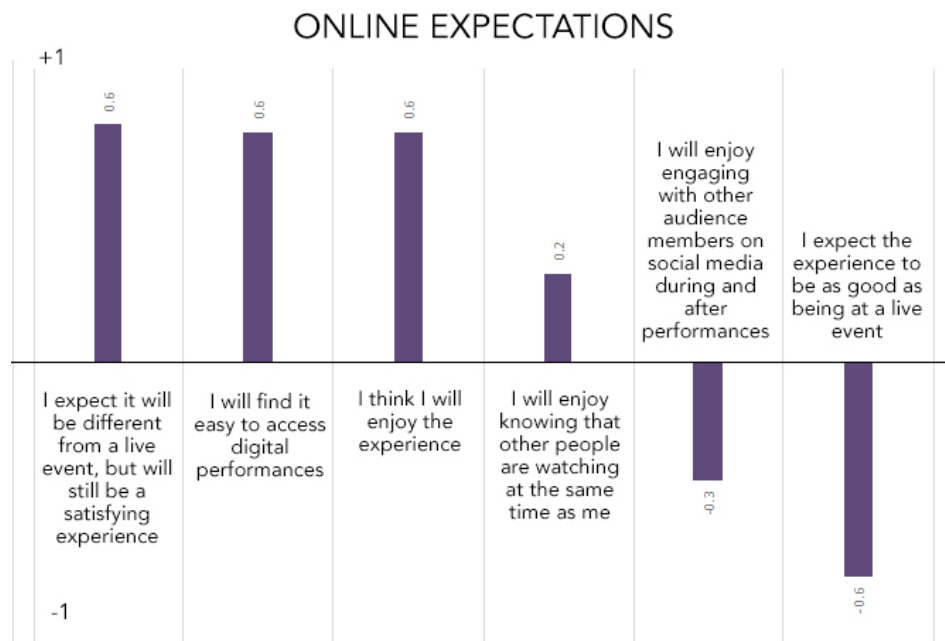
**80%**  
Are interested in culture online

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

Responses: 28,409



**Q:** To what extent do you agree with the following statements regarding your expectations for online events? Responses: 28,765

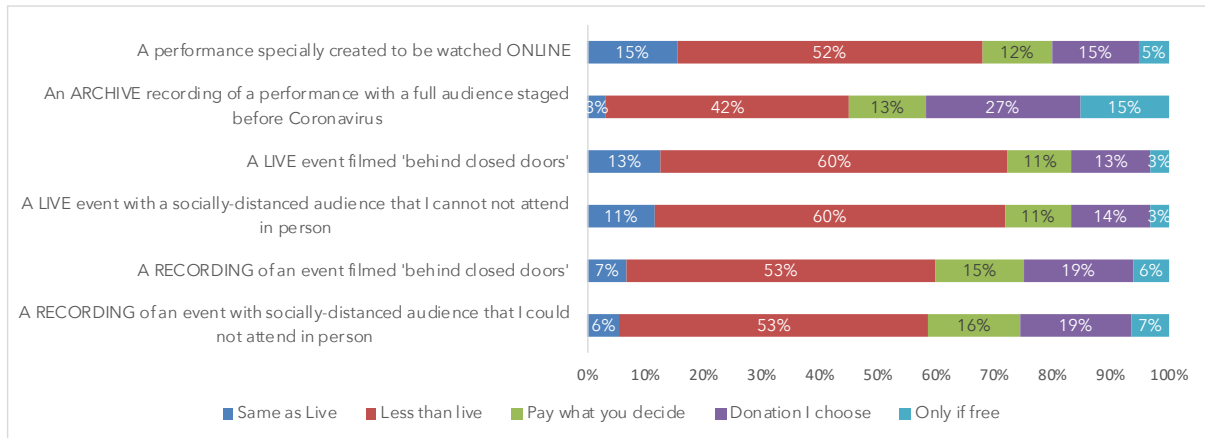


DIGITAL  
can be  
rewarding  
but is NOT a  
replication of a  
LIVE event

These figures were identical for wave 1 and wave 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.

Responses: 43,881



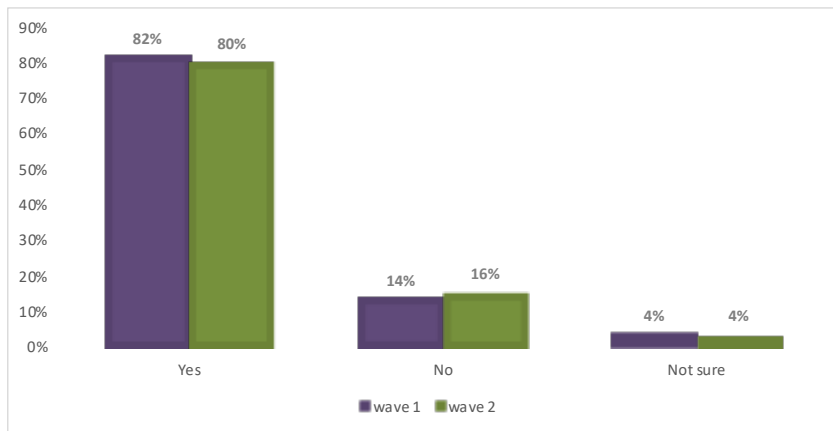
These findings are not significantly different from Wave 1. (See wave 1 report for full details)

Over 2/3 would pay to watch something **new**

## 2.5 Experiencing culture outdoors

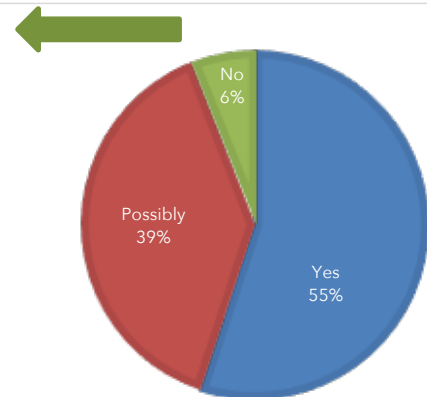
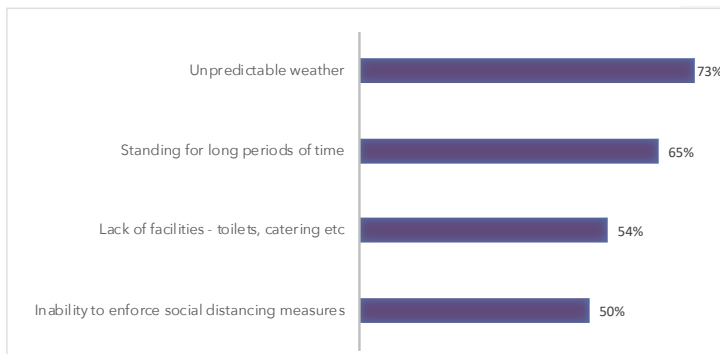
**Q:** Have you ever attended an outdoor arts event?

Responses: 35,373



**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 OUTDOORS?

Responses: 35,256

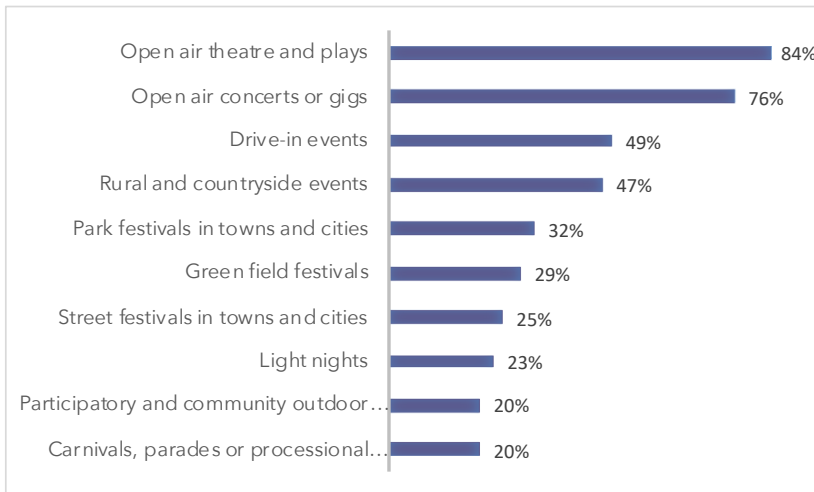


These figures are almost identical to wave 1



**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?

Responses: 32,926

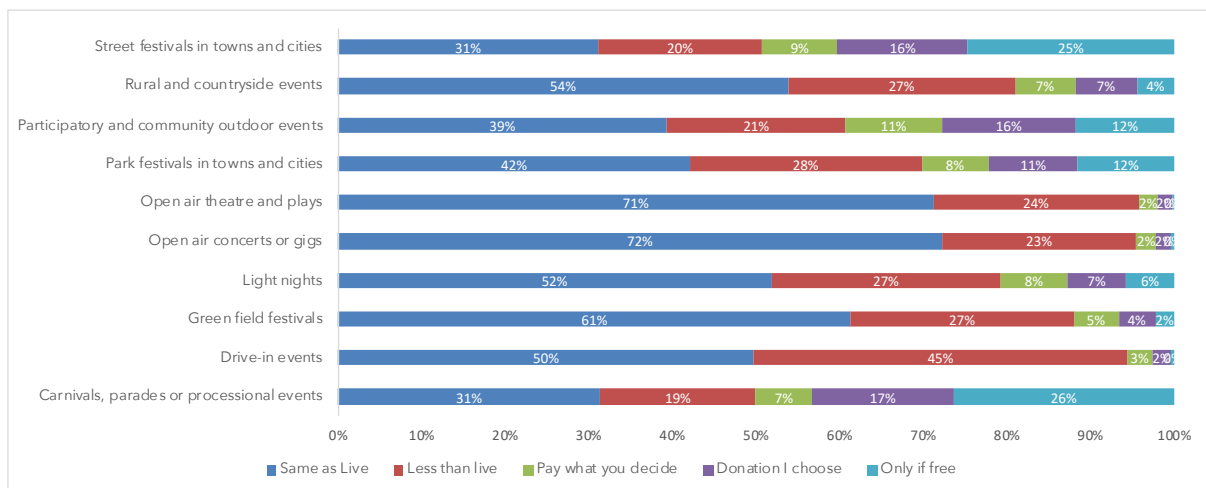


**>80%**  
Want 'outdoor versions' of what they see in a venue

This is not significantly different from wave 1.

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

Responses: 32,540



These findings are not significantly different from Wave 1. (See wave 1 report for full details)

There is much more of an appetite to pay 'the same as live' for outdoor events than digital

## 2.6 Economic Viability

**Q:** How concerned would you say you are about the financial survival of the organisation who sent you this survey? (scale 0-100)

Responses: 33,880

Audiences are VERY concerned about the survival of the organisation



**Q:** How much do you think you will be able to spend on cultural events once they can happen again 'as normal'? (scale 0-100)

Responses: 25,534



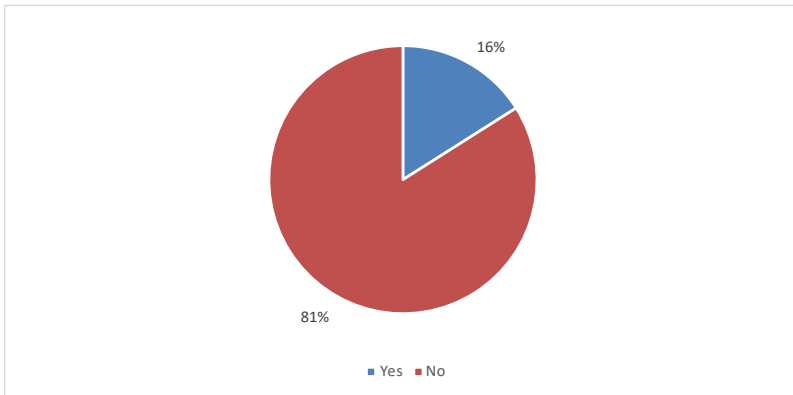
Audiences will be able to spend a little (4%) more on cultural events in the future

[This is the same as wave 1]

## 2.7 Disabled Audiences

**Q:** Do you identify as a D/deaf or disabled person, or have a long-term health condition?

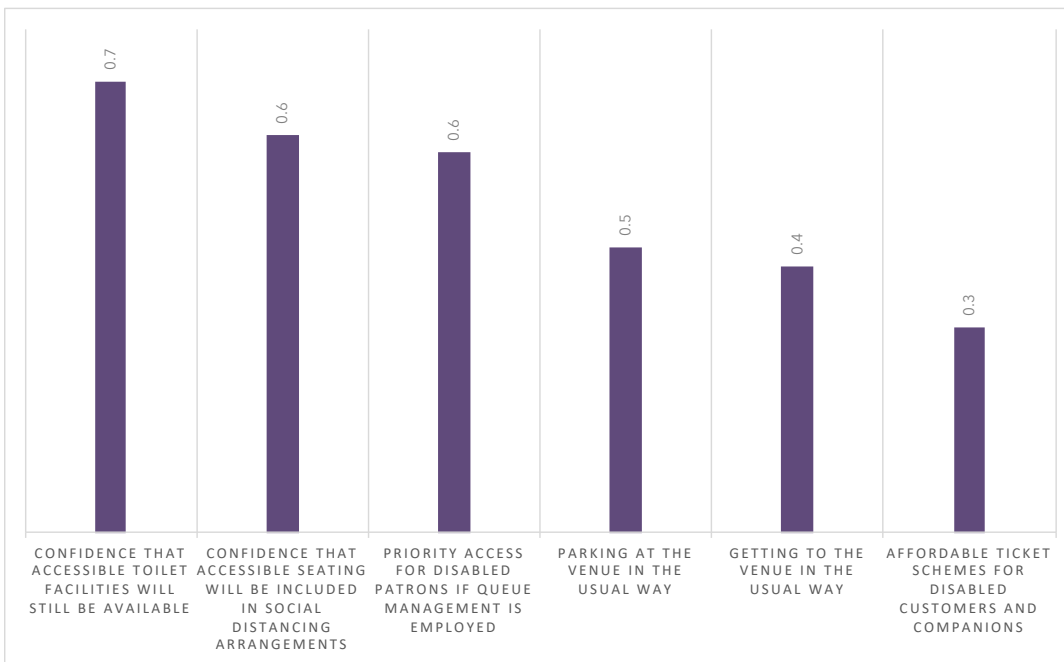
Responses: 34,582



This is not significantly different from wave 1

**Q:** Please tell us how important each of the following would be in making a decision when to return to live cultural events

Responses: 5,290

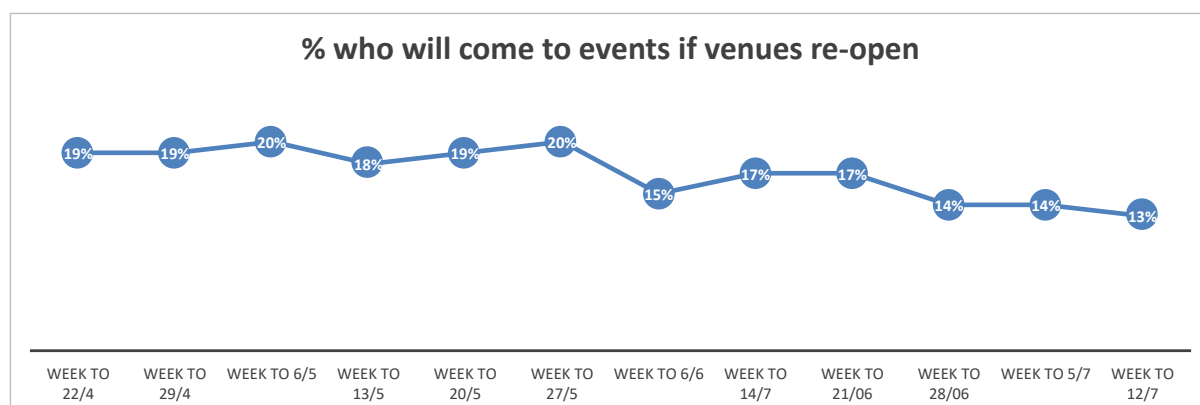
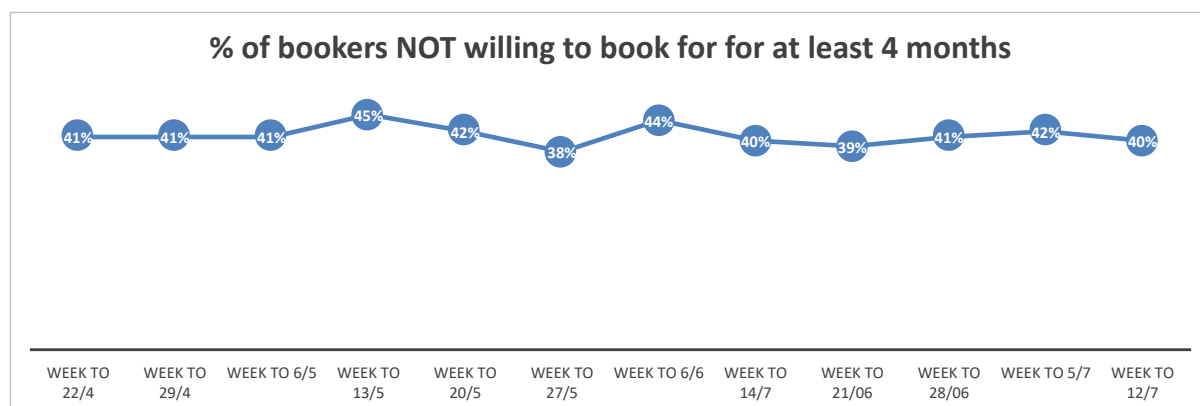
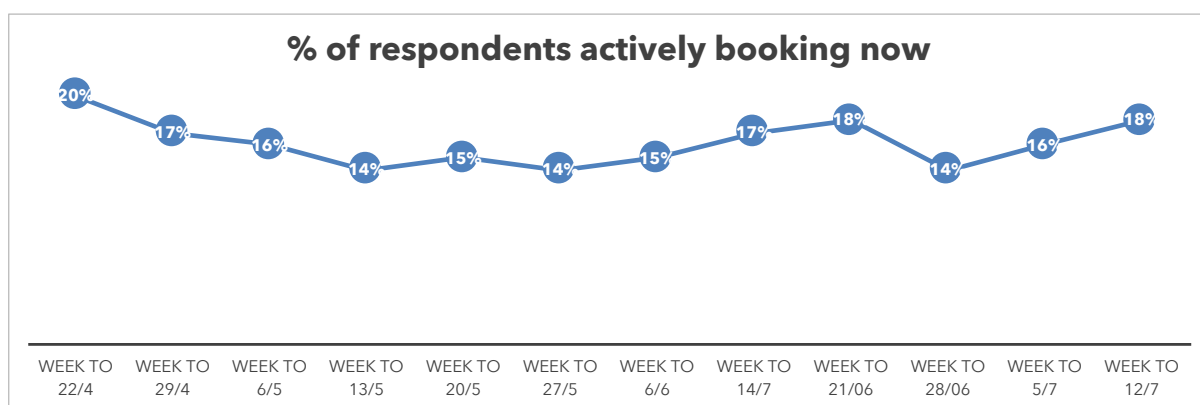


[This is identical to wave 1]

## Section 3. Key metrics compared week by week

The following 3 key metrics have been included in both After the Interval and Act 2, and are therefore possible to compare across 12 weeks to 15 July:

- **% of respondents actively booking** for events now, and of those
  - o **% booking for events not before 2021**
- Of those NOT actively booking
  - o **% 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



## 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

<b>England</b>	Hertford Theatre	Science Gallery London	Turner Sims Southampton
a space arts	Hexham Book Festival	Slapstick Festival	UCL Culture
ADC Theatre	Highlights Rural Touring	Southbank Centre	Victoria Theatre Halifax
Alnwick Playhouse	HOME	Spot On Lancashire	Villages in Action
AMATA, Falmouth University	Hull Theatres	St John's Smith Square	What Next? East London
Arts In Rural Gloucestershire	Hull Truck Theatre	St Martin-in-the-Fields	Wigmore Hall
Artsadmin	Ipswich Regent Theatre	Stamford Arts Centre	WildWorks
artsdepot	Jacksons Lane	Stephen Joseph Theatre	Wiltshire Creative
Artsreach	Jersey Arts Centre	Strode Theatre	Wokingham Music Club
Assembly Hall	Jumped Up Theatre	Sulgrave Manor Trust	YMCA Theatre Scarborough
Attenborough Centre for the Creative Arts	Junction Goole	Sunderland Culture Arts Centre	York Concerts
b-side CIC	Kenton Theatre	Washington	
Barbican Centre	Kings Theatre Portsmouth	Take Art	<b>Scotland</b>
Bath Box Office	Kirkgate Arts	Tetbury Music Festival	Aberdeen Performing Arts
Bath Festivals	Kneehigh	Tete a Tete Productions	Ayr Gaiety Partnership
Birmingham Contemporary Music Group	Lakeside Arts, University of Nottingham	The Albany	Byre Theatre
Birmingham Literature Festival	Leeds Playhouse	The Albany Theatre	Capital Theatres
Blackheath Halls	Leicester Square Theatre	The Apex	Cranleigh Arts
Blaize	Lichfield Garrick Theatre	The Atkinson	Edinburgh Festival Fringe
Bournemouth Symphony Orchestra	LIFT	The Boo	Edinburgh International Festival
Bradford Theatres	Lighthouse, Poole's Centre for the Arts	The Brewhouse Theatre & Arts Centre	Hanger Farm Arts Centre
Brighton Dome and Brighton Festival	Lincoln Arts Trust Limited	The Bridgewater Hall	Horsecross Arts - Perth Concert Hall and Perth Theatre
Bristol Cultural Development Partnership	Little Angel Theatre	The Core Theatre Solihull	Live Life Aberdeenshire
Bristol Old Vic	London Musical Theatre Orchestra	The Corn Hall, Diss	Lyth Arts Centre LTD
Britten Pears Arts	London Philharmonic Orchestra	The Courtyard	Macrobert Arts Centre
Britten Sinfonia	London Symphony Orchestra	The Crescent Theatre	Pavilion Theatre Glasgow
Calstock Arts	Louth Riverhead Theatre	The Factory of Creativity (Hope Mill Theatre)	Royal Scottish National Orchestra
Camberley Theatre	Manchester Camerata	The Fisher Theatre	Scottish Chamber Orchestra
Cambridge Junction	Manchester International Festival	The Forum	Scottish Ensemble
Cambridge Music Festival	Marina Theatre Lowestoft	the forum theatre Barrow-in-Furness, Cumbria	Scottish Opera
Carn to Cove	Mayflower Theatre	The Guildhall Trust	Scottish Society of Playwrights
Carnegie Theatre & Arts Centre	MGSO4 Epsom & Ewell Arts Festival	The Hallé	SEALL
Cast	Middlesbrough Theatre	The HandleBards	Summerhall
Castleford Phoenix Theatre	Middlesbrough Town Hall	The Headgate Theatre	the Barn
CBSO	Midlands Arts Centre	The Horton	The Brunton
Cheshire Rural Touring Arts	Minack Theatre	The Lamproom Theatre	The Swallow Theatre
Chichester Festival Theatre	Miracle Theatre	The Lord Chamberlain's Men	The Touring Network
Chipping Norton Theatre	Museum of Comedy	The Lowry	Traverse Theatre
Cornerstone	Nevill Holt Opera	The Maddermarket Theatre	Tron Theatre
Cornish Riviera Box Office	New Vic Theatre	The Magna Vitae Embassy Theatre	Universal Hall Promotions
Criterion Theatre	New Writing North	The Maltings	Usher Hall
Darlington Hippodrome	Newcastle Theatre Royal	The Manchester Lit & Phil	<b>Wales</b>
Dash Arts	Nonsuch Studios	The Met	Borough Theatre Abergavenny
De Montfort Hall	Northern Stage	The North Wall	Canolfan Ucheldre Centre
Derby LIVE	Norwich Puppet Theatre	The Old Market	Canolfan y Celfyddydau
Eastern Angles Theatre Company	Nottingham Playhouse	The Old Vic	Aberystwyth Arts Centre
Ellipsis Entertainment Ltd	Nuneaton Arts Council	The Place	Carnegie House
EM Forster Theatre Tonbridge School	Octagon Theatre Bolton	The Point, Eastleigh & The Berry Theatre	Grand Pavilion, Porthcawl
Empire Consett	Oldham Coliseum Theatre	The Princess Theatre and Arts Centre	Hijinx
English National Ballet	Opera North	The Rose Theatre	Memo Arts Centre
English National Opera	Orchestra of the Swan	The Royal Shakespeare Company	National Theatre Wales
English Symphony Orchestra	Oxford Playhouse	The Sixteen Ltd	New Theatre Cardiff
English Touring Opera	Painswick Music Society	The Stoller Hall	NoFit State Circus
Ex Cathedra	Paraorchestra	The Wardrobe Theatre	Pontardawe Arts Centre
Farnham Maltings	Penlee Park Open Air Theatre	The Watermill Theatre	Royal Welsh College of Music & Drama
Gala Theatre and Cinema	Peoples Theatre	The Woodville	Sherman Theatre
Grand Theatre	Philharmonia Orchestra	Theatre Royal & Royal Concert Hall Nottingham	St David's Hall
Guildford Shakespeare Company Trust Ltd	Pocklington Arts Centre	Theatre Royal Bury St Edmunds	Swansea Grand Theatre
Guildhall Arts Centre	Poplar Union	Theatre Royal Plymouth	Taliesin Arts Centre
Guildhall School of Music & Drama	Queen's Hall Arts, Hexham	Theatre Royal Stratford East	The Gwyn Hall Theatre
Gulbenkian	Red Ladder Theatre Company	Theatre Royal Wakefield	The Princess Royal Theatre
Hackney Empire	Ribble Valley International Piano Week	Theatre Royal Winchester (Play to the Crowd)	Theatr Brycheiniog
Hall For Cornwall	Rotherham Theatres	Theatre Royal Wokingham	Theatr Clwyd
Harlow Playhouse	Royal Albert Hall	Three Choirs Festival	Theatrau Sir Gâr / Carmarthenshire Theatres
Haverhill Arts Centre	Royal Liverpool Philharmonic	Trinity Orchestra	Torch Theatre
	Royal Opera House		Venue Cymru
	Sadler's Wells		Welsh National Opera