After the Interval / Act 2: Scotland Audience Research

Audience views on returning to live cultural events, booking tickets now and in the future, and missing out on events during lockdown.

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Scotland Analysis commissioned by

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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 **After the Interval** 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.

The data was collected between 16 April and 27 May.

A second survey 'After the Interval: **Act Two'** began on 1 June and ran until 15 July.

This report takes a Scotland-only cut of the data, and outlines the key metrics for consideration in Scotland.

Section A: 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.

Responses were limited to 1,000 per organisation. Emails were sent out in waves and responses analysed.

29 cultural organisations in Scotland have participated in After the Interval and Act 2 to date, and these are listed in Appendix 2.

Over the 12 week period over 25K responses from audience members of Scottish organisations were received: 13.5K for After the Interval and 12K for Act 2.

The results have been presented as overall figures for Scotland, as well as being analysed by the following criteria:

Age: comparing Over 65s with under 35s (we have screened out anyone who says they are 'vulnerable' to Covid in order to conclude differences purely by age

Organisation type: these were categorized into:
- Opera, Theatre & Ballet
- Music organisations eg. Concert Halls, Orchestras
- Mixed eg. Arts Centres, Touring

Organisation location:
- Urban
- Rural (this also includes some locations categorized as peri-urban)

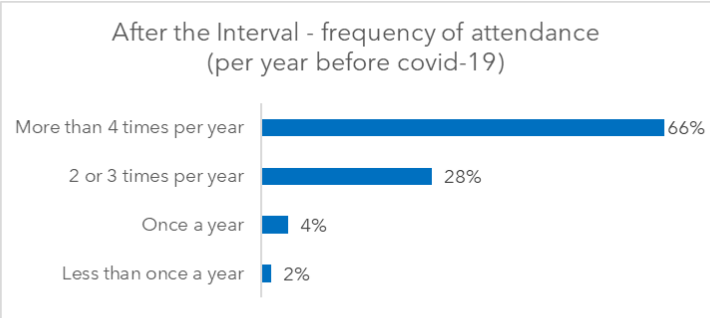
For each of these criteria, we have identified through the report where we found significant differences. Where no comment has been made, it is because the results are broadly similar to the average overall.

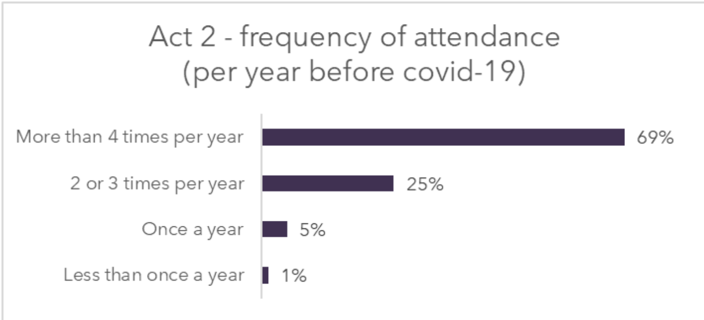
[1] Recent: have attended an event in the last 2 years
[2] Frequent: have attended more than once

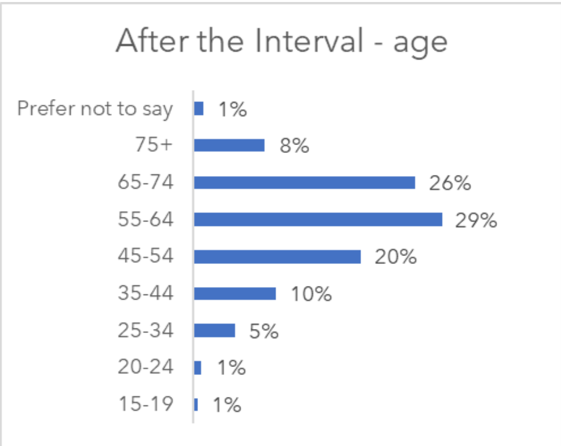
Sample breakdown

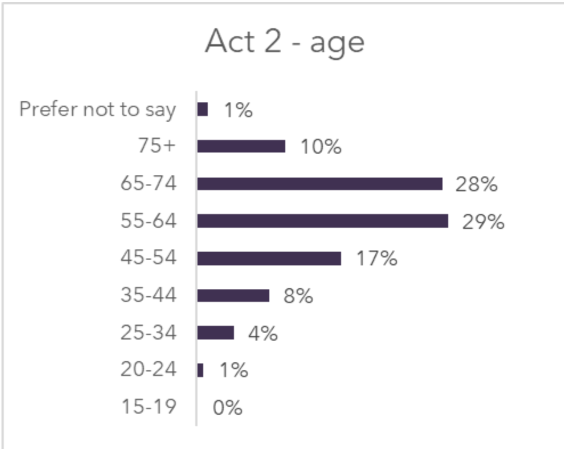
After the Interval: 13,546 / Act 2: 12,003

Respondents in both surveys were representative of an ENGAGED CULTURAL audience with a high frequency of attendance – over 2/3 said they attended 4 or more times per year before Covid-19. These are the people we most wanted to hear from in terms of their likelihood to reattend.

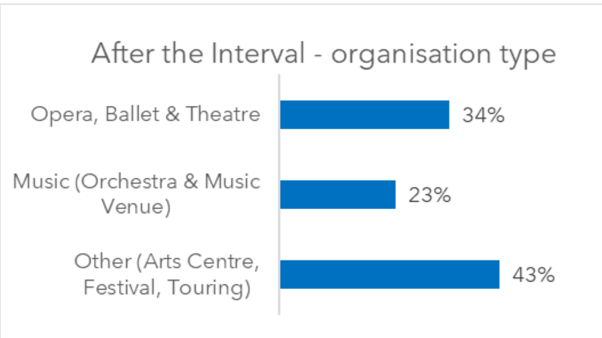


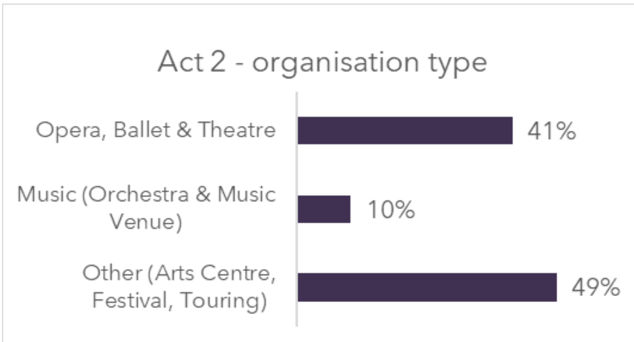




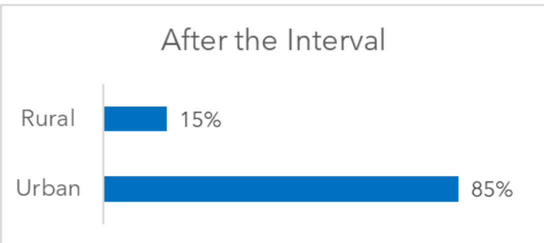


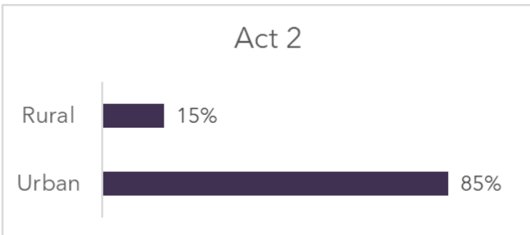
Responses by organisation type





Split of urban and rural responses





Section B: After the Interval findings

1. Missing events during lockdown

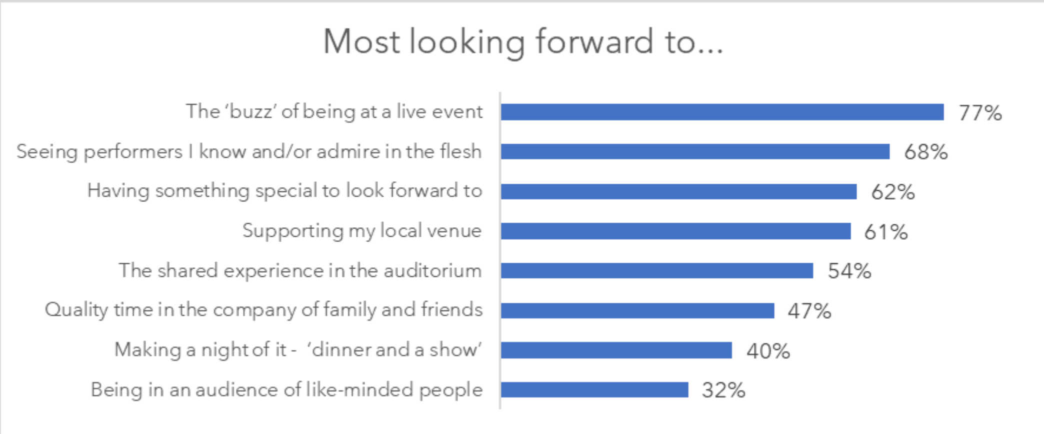
Q: Are you **missing the opportunity** to attend live events at the moment?
Responses: 13,546

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

	Scotland	UK
Yes - a lot	**64%***	**61%**
Somewhat	30%	33%
Not really	5%	6%
Not at all	1%	1%

*This was significantly higher with ***Music*** audiences, at 72%, and significantly lower with ***Rural*** audiences at 54%.

Q: What are you **most looking forward** to about attending events again in the future?
Responses: 12,471



77%
want to get back to the BUZZ OF A LIVE EVENT

68%
want to see PERFORMERS UP CLOSE

61%
want to SUPPORT their LOCAL VENUE

These figures are consistent with findings for the whole of the UK. However, some differences by age, arform and area are:

- ***Under 35s*** were much likely to say they wanted something to look forward to get them out of the house (79%), seeing friends (59%) and 'making a night of it' (54%)
- ***Music*** audiences were much more looking forward to seeing performers up close (76%) and the shared experience in the auditorium (62%).
- ***Rural*** audiences were much more likely to say that they were looking forward to supporting their local venue (72%).

2. Booking NOW for Events in the future

Q: Are you actively booking NOW for events in the future?
Responses: 13,151

Only
16%
of respondents are booking for events

	Scotland	UK
Yes	**16%**	**16%**
No	84%	84%

Q: When are the events that you are booking for scheduled to take place?
Responses: 1,960

Half
of those booking are for events from NOVEMBER

This is consistent with the rest of the UK.

However, there are some interesting differences by age:

	All Scotland	**Age 65+**	**Age <35**
June	3%	3%	4%
July	2%	3%	5%
Aug	4%	3%	5%
Sept-Oct	38%	**45%**	35%
Nov-Dec	21%	16%	11%
Jan onwards	32%	31%	**41%**

Significantly more ***Over 65s*** were booking for events in Sept-Oct, whilst younger people (***Under 35s***) were booking more for Jan onwards.

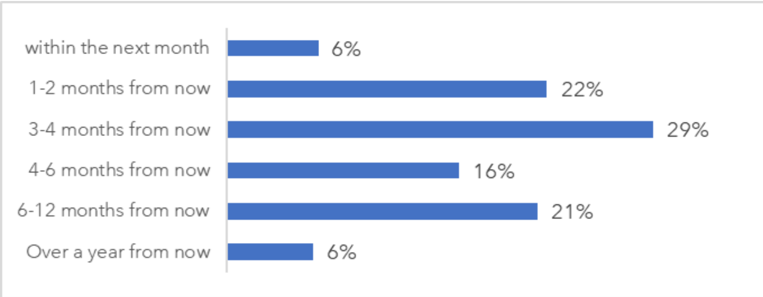
This could of course simply be related to the types of events on sale for those periods, especially as those booking for ***Music*** events were significantly higher (57%) in Sept-Oct.

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: 10,908

43%

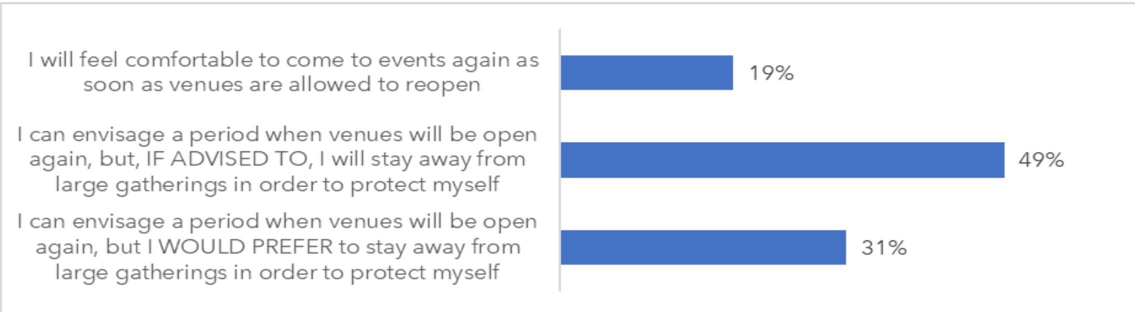
would not consider booking for events for **at least 4 months**



This is entirely consistent with the findings for the UK, but there are again some significant variances by age:

- Younger audiences (**Under 35s**) are more willing to book for events sooner (37% would book within 2 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: 11,044



Only
19%
would return to attending events just because venues re-open

31% would
STAY AWAY
from large gatherings even if venues open

These findings are consistent with the UK picture. However, there are some surprising variances by age:

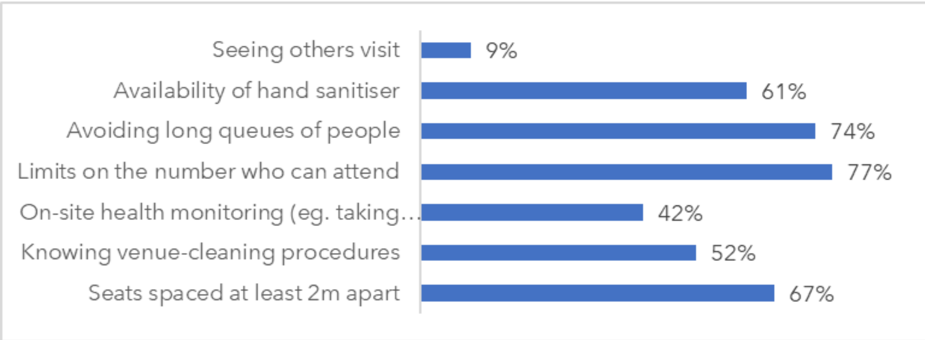
- ***Over 65s*** (excluding those who are vulnerable to Covid) are MORE likely to attend (26%) when they see venues re-open, with fewer (23%) saying they would stay away from large gatherings.

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: 8,300

77%

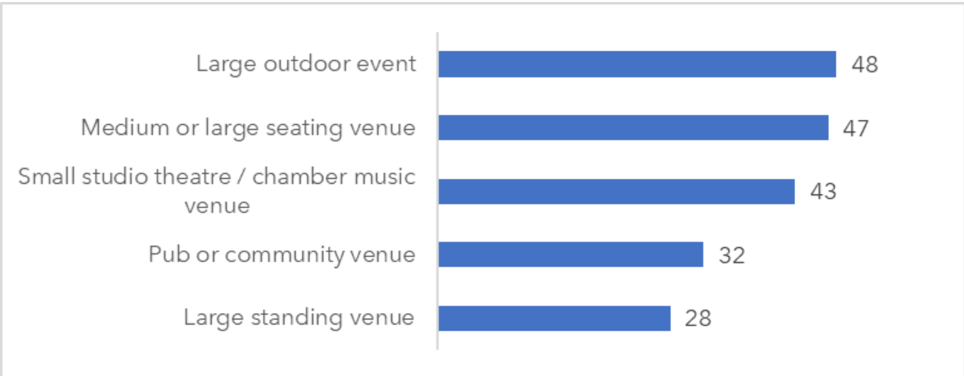
would feel safer with some form of social distancing measures



The overall findings are consistent with the UK picture. Significant differences by age are:

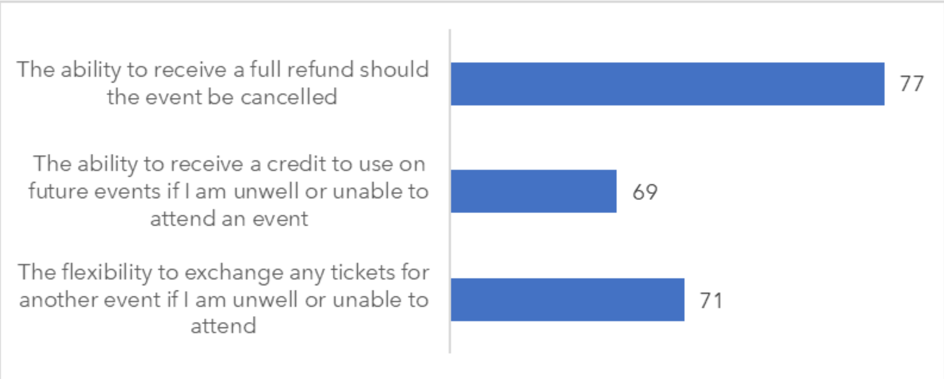
- ***Under 35s*** are more likely to feel confident if they see others visit (15%), and if hand sanitiser is available (72%)

Q: Are there certain **types of venues** that you would feel happier coming back to before others?
Responses: 3,569



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: 10,026



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

There are no significant differences, either by age or artform.

6. Supporting Cultural Charities

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

70%

of respondents were aware that the organisation was a charity*

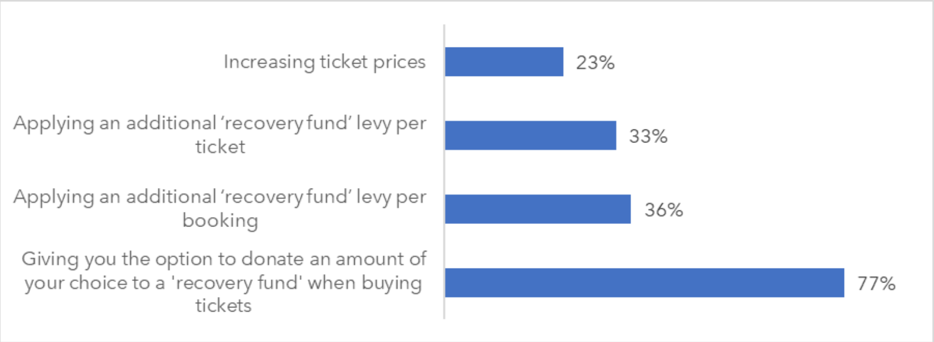
Responses: 11,082

*This is higher than the average for UK cultural charities (66%), although there was no significant difference by age or artform.

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: 10,930

77%

would support a voluntary donation at point of sale*



*Under 35s were MUCH more likely (87%) to support this option

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: 10,440

The 'cause' that most identified with was the ability to enable people who can't now afford to come to access tickets (59%). This was significantly higher in Scotland than for the UK as a whole (52%).

It also appears that ***Under 35s*** were more likely to support schemes around Digital Culture (48%), Education and Skills development (46%) and intergenerational projects (43%).

Section C: Act 2 findings

1. Booking NOW for Events in the future

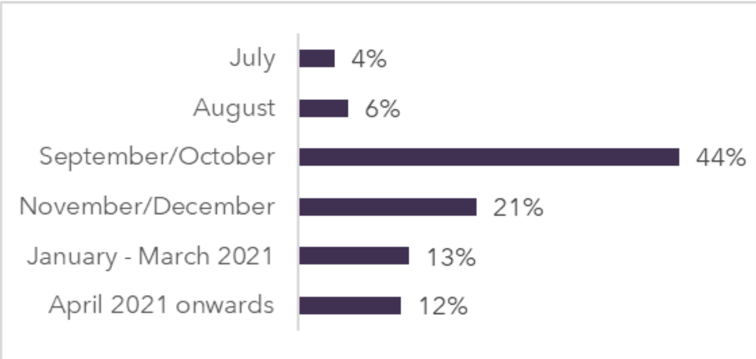
Q: Are you actively booking NOW for events in the future?
Responses: 12,039

Only
19%
of respondents are booking for events

	Scotland	UK
Yes	19%	18%
No	81%	82%

The proportion of respondents actively booking for events is consistent with the UK as a whole. ***Rural*** audiences were much less likely to be booking for events (10%).

Q: When is the first event that you are booking for scheduled to take place?
Responses: 2,096

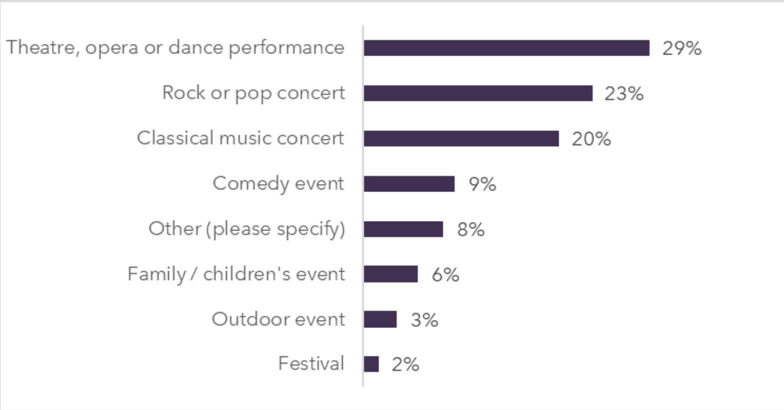


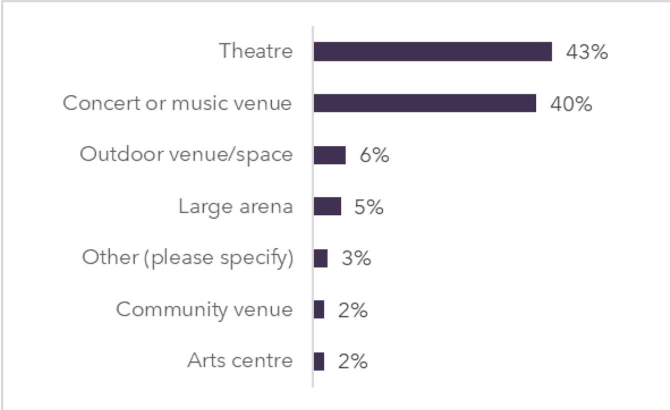
45%
of those booking are for events from NOVEMBER*

Scotland has considerably more people (44%) booking for events in Sept/Oct than the UK as a whole (37%).

These are over-represented in the ***65+*** age bracket (52%) and with ***Music*** audiences (67%).

Q: Which of the following best describes the type of event it is / type of venue where the event will be held? *Responses: 2,094*





Scotland has a higher percentage of respondents who are booking for classical music than the UK average, and fewer theatre bookers:

Type of event	**Scotland**	**UK**
Theatre, opera or dance performance	29%	36%
Classical music concert*	**20%**	10%
Rock or pop concert	23%	25%

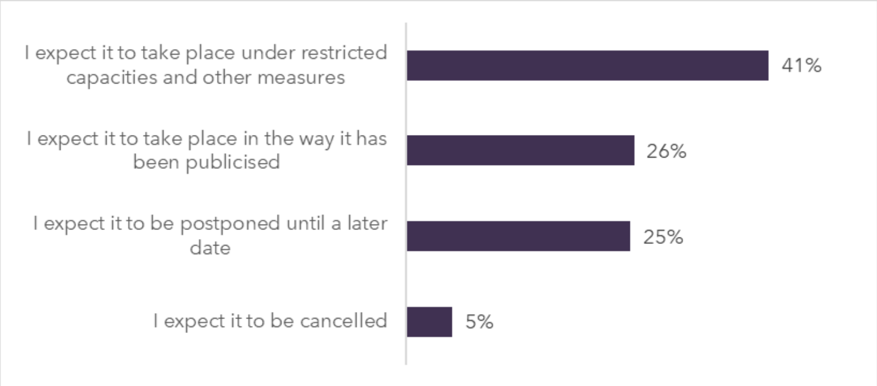
****Rural*** audiences were much less likely to be booking for Classical music (5%), but more likely to be booking for outdoor events (10%) and 'other' (16%), where most listed Folk Music.

This is also reflected in the types of venues respondents are booking for:

Type of venue	**Scotland**	**UK**
Large arena	5%	4%
Outdoor venue/space	6%	7%
Theatre	43%	53%
Concert or music venue	**40%**	27%
Community Venue	2%	2%

Rural audiences were much less likely to be booking for traditional venues such as Concert venues (23%) or Theatres (35%) but more likely to be booking for outdoor (14%) and Community venues (11%).

Q: What is your current expectation regarding this event?
Responses: 2,091



67%
Expect events they have booked for to go ahead

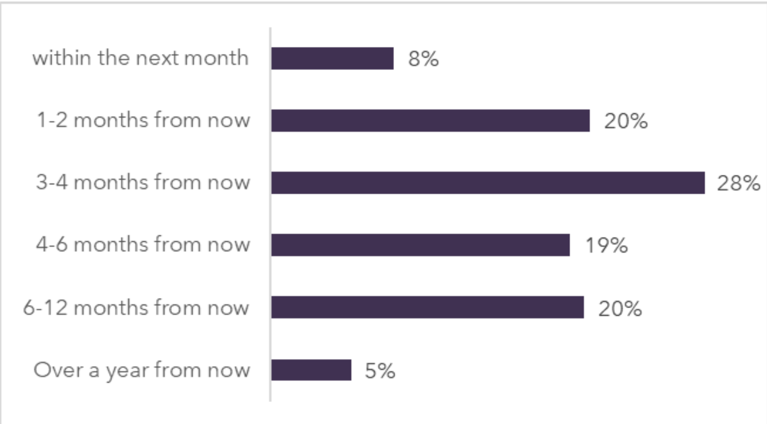
- 41% expect to see restrictions put in place on the events they have booked for
- ***Under 35s*** are more likely to expect the event to go ahead with no restrictions in place (33%) whilst ***over 65s*** are more likely (48%) to expect some form of restrictive measures to be introduced

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: 9,261

72%
would not consider booking for events for **at least 3 months**

This compares with 69% for the UK as a whole



Under 35s are more likely to say they will book within the next 2 months (41%), compared with only 29% of ***Over 65s***.

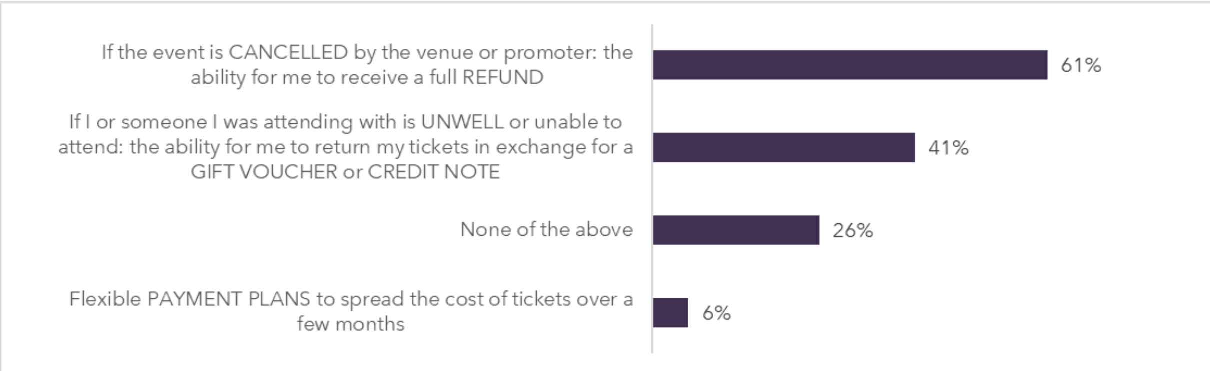
Q: Please tell us which of the following statements best fits how you're currently feeling about coming out to events at a venue again?
Responses: 9,330

ONLY
16%
would come to venues as soon as they can re-open

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

Again, ***Under 35s*** are more likely (24%) to say they would be willing to attend, just because venues re-open

Q: Would any of the following make you more likely to book NOW for events in the future?
Responses: 9,280



Reassurances about refunds and exchanges seem more important to ***Under 35s*** than the average for all respondents

	All Scotland	**Under 35s**
If the event is CANCELLED by the venue or promoter: the ability for me to receive a full REFUND	61%	**74%**
If I or someone I was attending with is UNWELL or unable to attend: the ability for me to return my tickets in exchange for a GIFT VOUCHER or CREDIT NOTE	41%	**54%**
Flexible PAYMENT PLANS to spread the cost of tickets over a few months	6%	**13%**

3. Safety and Comfort

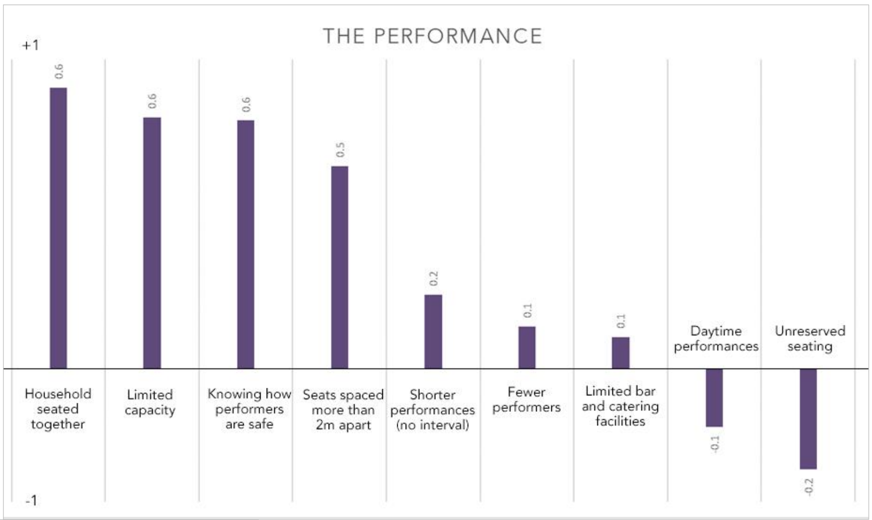
Q: Would the following social distancing measures make you MORE or LESS likely to consider attending a live cultural event?
Responses: 7,919

MORE
Limited numbers, queue management
Households seated together; seats distanced
Hand sanitiser, Covid-safe 'kite-mark'

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

These findings are consistent with those for the UK as a whole

****Rural*** audiences were less bothered about unreserved seating (score of 0) compared with -0.2)

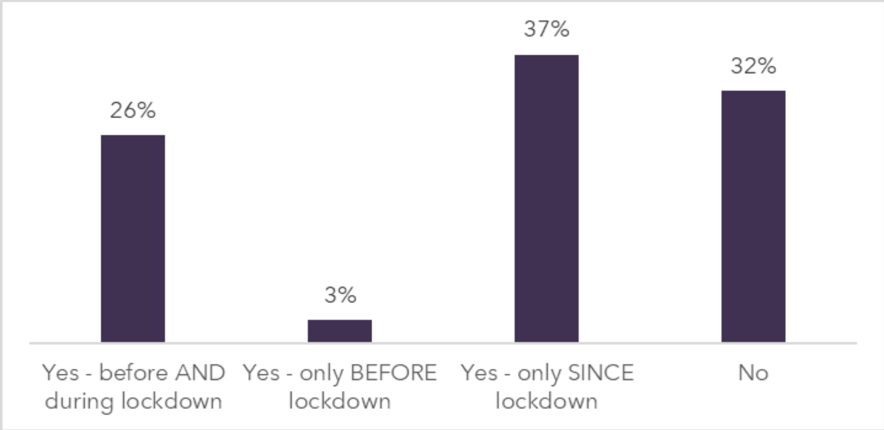


4. Experiencing culture digitally

Q: Have you engaged with any cultural events ONLINE, either before or during the recent lockdown?
Responses: 10,853

66%*
have experienced culture online

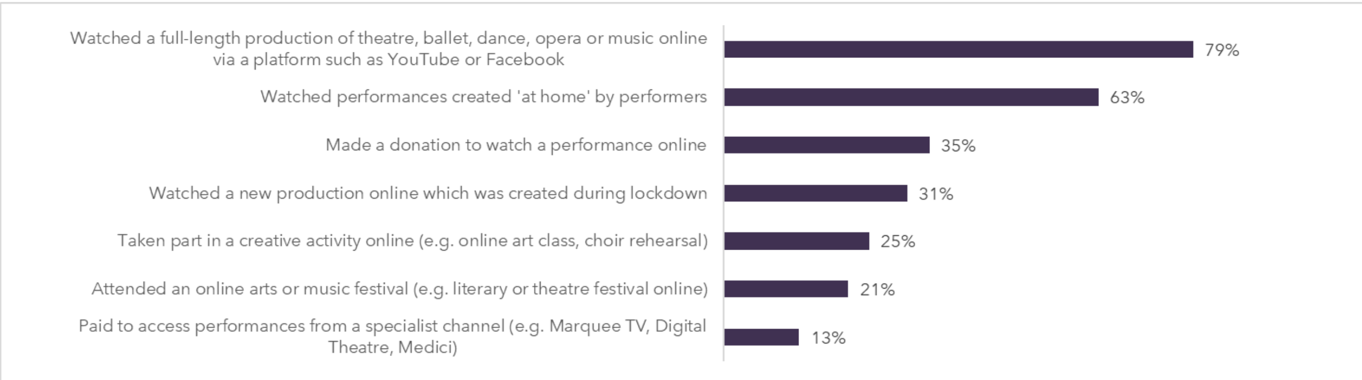
*This compares with 62% for the UK as a whole



More people (37%) have experienced digital culture for the first time since lockdown than had tried it before (29%).

Of those new digital 'attenders' more of the ***Music*** respondents (42%) were new to digital than other artforms. ***Theatre/Opera/Ballet*** respondents were much more likely (40%) to have NOT engaged with digital culture at all.

Q: Which of the following types of online activity have you done during lockdown?
Responses: 6,759

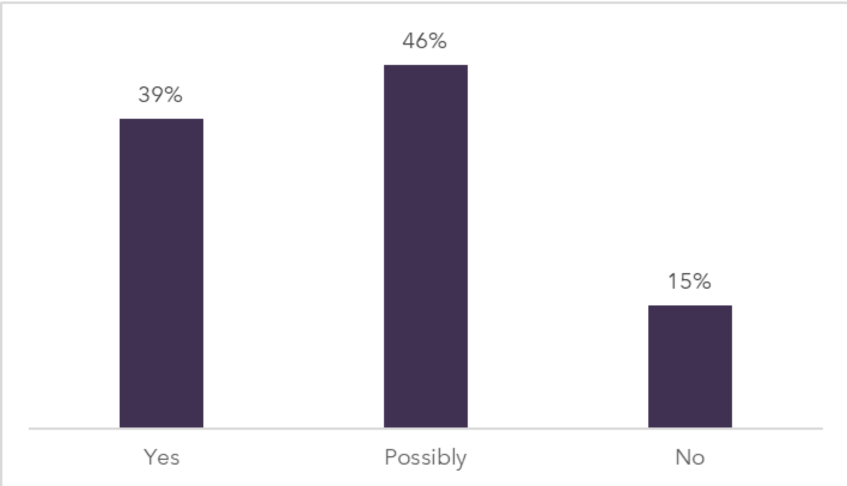


In Scotland the 63% of respondents who have watched performances created 'at home' by performers is significantly higher than the average for the UK (53%).

Under 35s are significantly more likely (36%) to have taken part in a creative activity online (e.g. online art class, choir rehearsal) than the average (25%).

Rural audiences are less likely to have watched a full length production (74%), although this is still high, and more likely to have taken part in a creative activity online (35%).

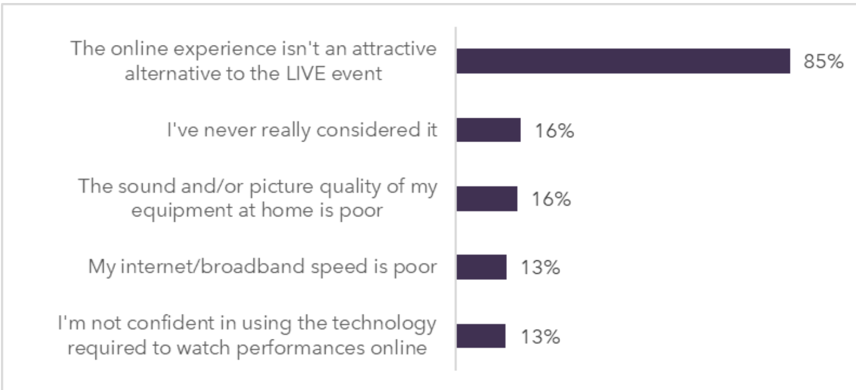
Q: If you were unable to go to cultural events in a venue for the foreseeable future, would you be interested in engaging with cultural events ONLINE?
Responses: 10,741



85%*

are interested in culture online

*compares with 82% for UK

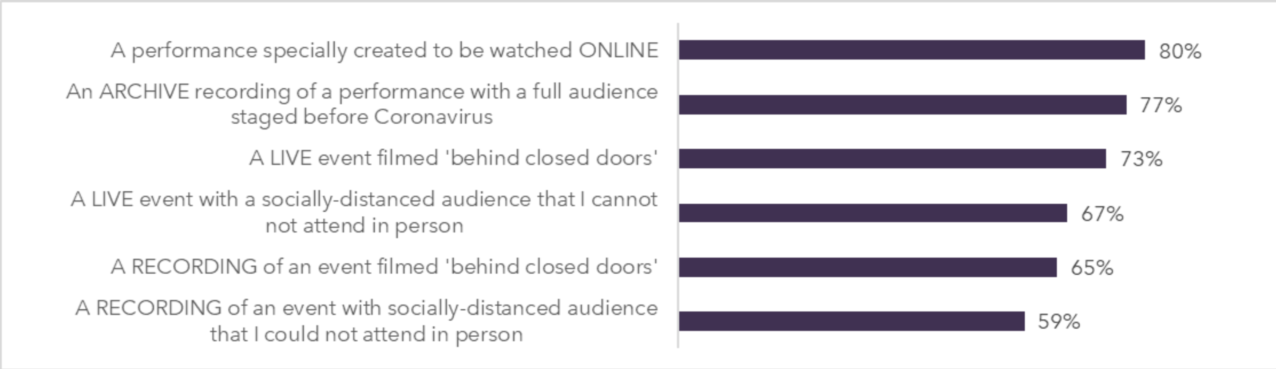


For ***Under 35s*** two barriers to online are significantly higher than for other respondents:

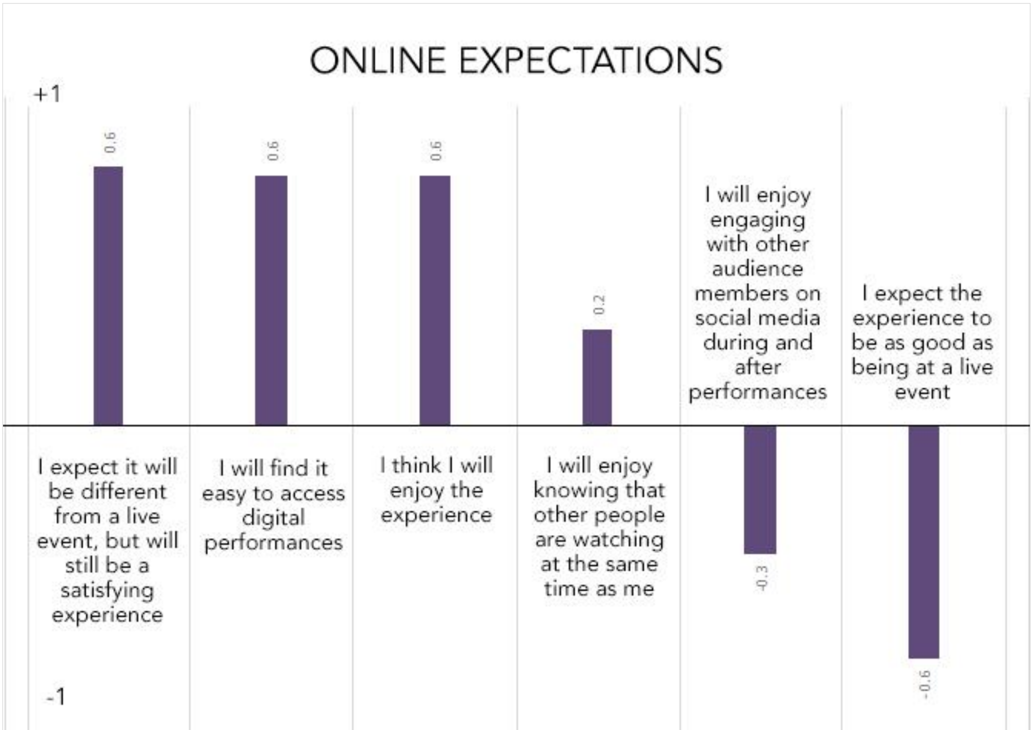
	All Scotland	**Under 35s**
There isn't a good **range** of events to choose from	5%	**11%**
The **quality** of events isn't high enough	8%	**20%**

Whereas for ***Rural*** audiences, internet/broadband connectivity is much higher (22%) than the overall population (13%).

Q: Which of the following might you be interested in engaging with online in the future?
Responses: 8,792



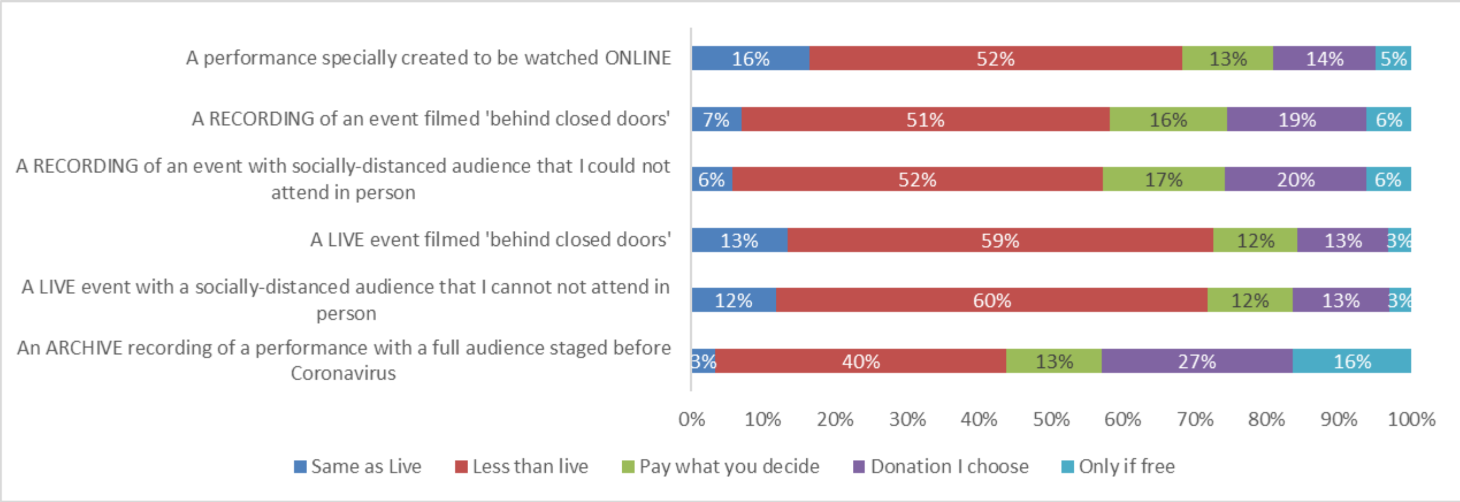
Q To what extent do you agree with the following statements regarding your expectations for online events? *Responses: 8,876*



DIGITAL can be rewarding

but is NOT a replication of a LIVE event

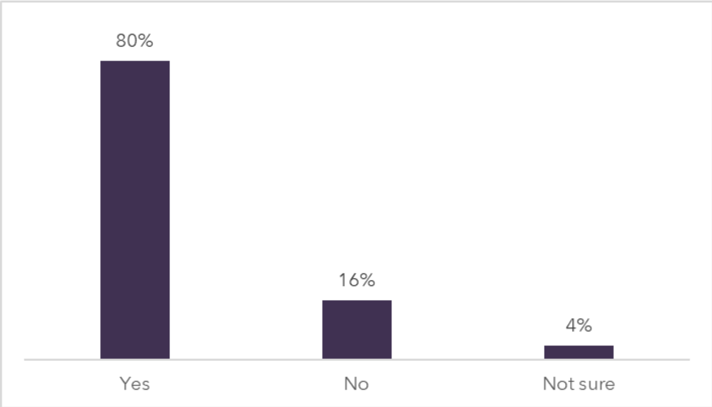
Q For each of the following, please tell us what you would consider spending in order to watch or attend an online cultural event.
Responses: 8,531



Over 3/4 would pay to watch something **new**

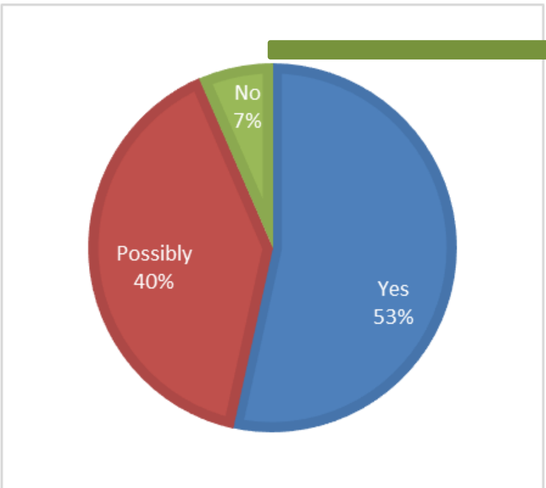
5. Experiencing culture outdoors

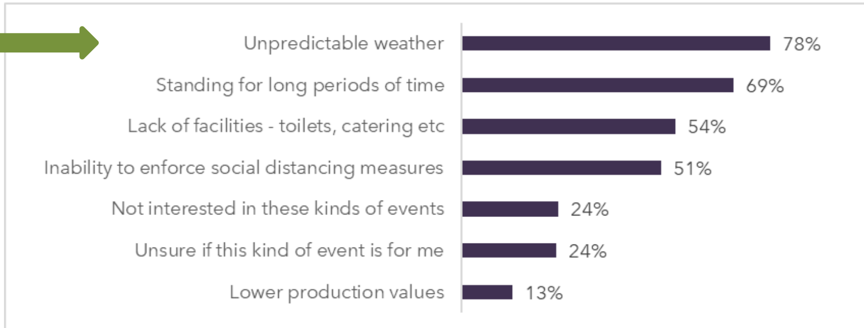
Q: Have you ever attended an outdoor arts event? *Responses: 1,757*



Rural audiences are even more likely to have attended an outdoor event (85%)

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: 1,786*





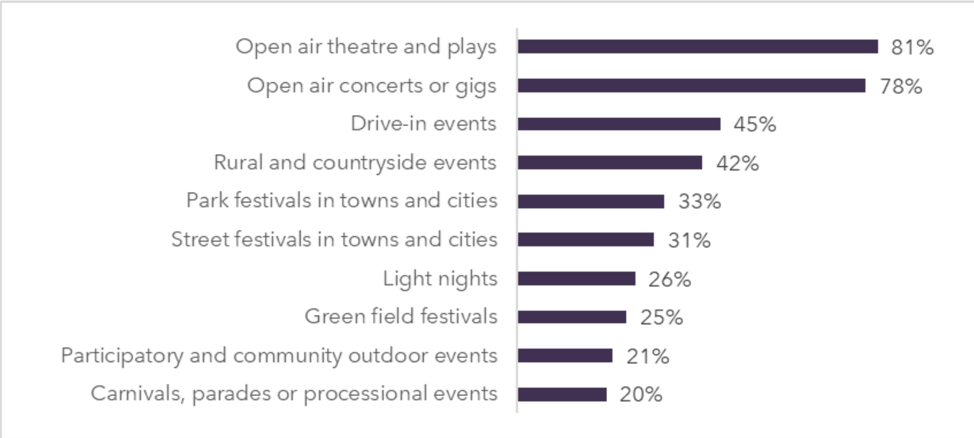
Rural audiences are significantly MORE interested in outdoor events (61%) compared with overall (53%)

As with digital, there are some barriers of particular significance for ***Under 35s***:

	All Scotland	**Under 35s**
Lack of facilities - toilets, catering etc	54%	**64%**
Lower production values	13%	**21%**
Not interested in the kinds of events that happen outdoors	24%	**43%**

Rural audiences are more concerned (58%) about the inability to enforce social distancing measures, but less concerned about lack of facilities (45%) or the kinds of events that happen outdoors (15%).

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: 9,550

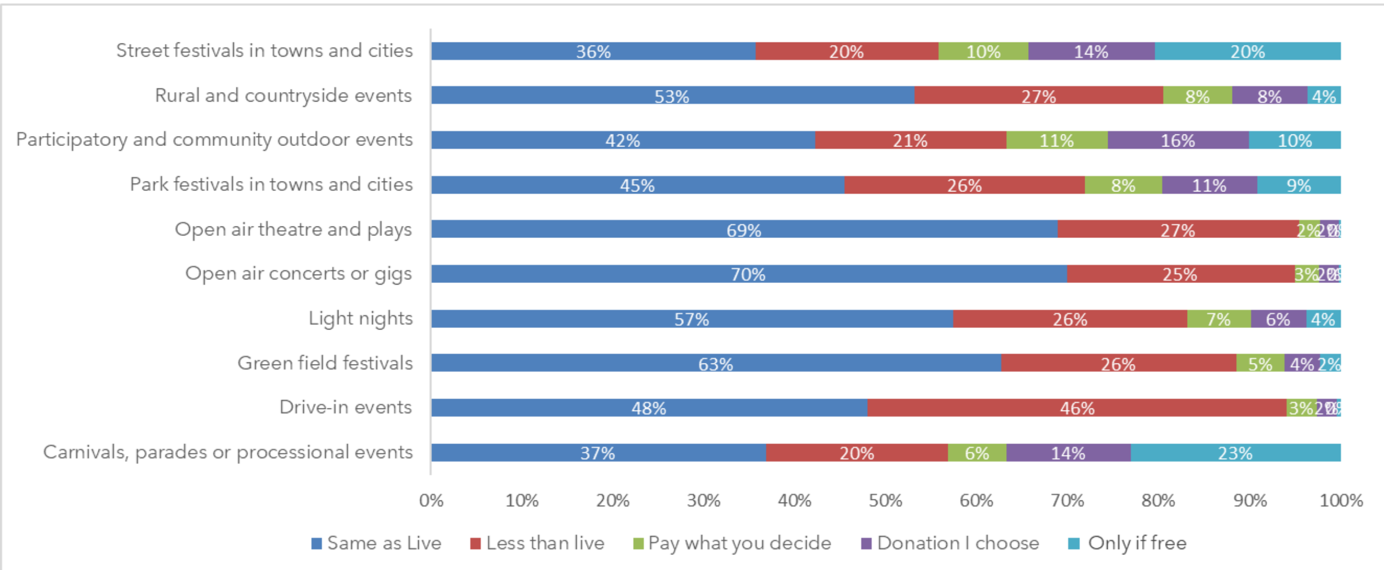


>80%

Want 'outdoor versions' of what they see in a venue

Under 35s were much more likely to be interested in Drive-in events (64%), Light nights (44%), Park festivals (54%) and Green field festivals (40%).
Over 65s were generally much less interested in outdoor events, as were Music respondents.
Rural audiences are significantly more interested in Rural and countryside events (64%) and Participatory and community events (31%).

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: 9,447



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

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: 9,860

Audiences are VERY concerned about the survival of the organisation

Not concerned
0

81

Very concerned
100

[This is the same as UK]

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: 7,542

A lot less than before
0

54

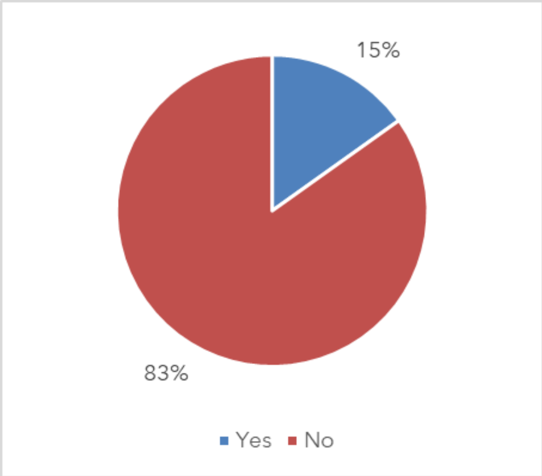
A lot more than before
100

[This is the same as UK]

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

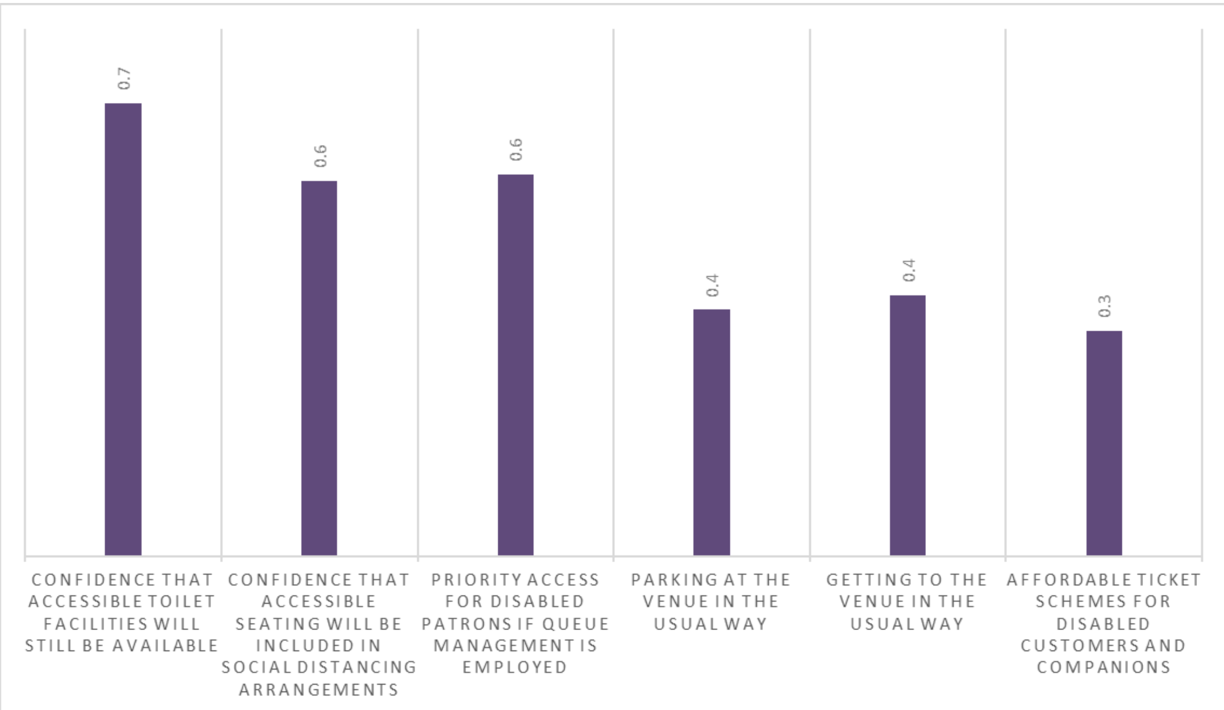
7. Disabled Audiences

Q: Do you identify as a D/deaf or disabled person, or have a long-term health condition?
Responses: 10,054



This is consistent with UK results

Q: Please tell us how important each of the following would be in making a decision when to return to live cultural events
Responses: 1,464



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

Aberdeen Performing Arts
Ayr Gaiety Theatre
Beacon Arts Centre
Byre Theatre
Capital Theatres
Citizens Theatre
Dundee Rep and Scottish Dance Theatre
Eden Court Highlands
Edinburgh Festival Fringe
Edinburgh International Festival
Horsecross Arts – Perth Concert Hall and Perth Theatre
Live Life Aberdeenshire
Lyceum Edinburgh
Lyth Arts Centre
Macrobert Arts Centre
National Theatre of Scotland
North East Arts Touring
OnFife
Pavilion Theatre Glasgow
Rapture Theatre
Royal Conservatoire of Scotland
Royal Scottish National Orchestra
Scottish Chamber Orchestra
Scottish Ensemble
Scottish Opera
SEALL
Summerhall
the Barn
The Brunton
The Swallow Theatre
The Touring Network
Traverse Theatre
Tron Theatre
Universal Hall Promotions
Usher Hall