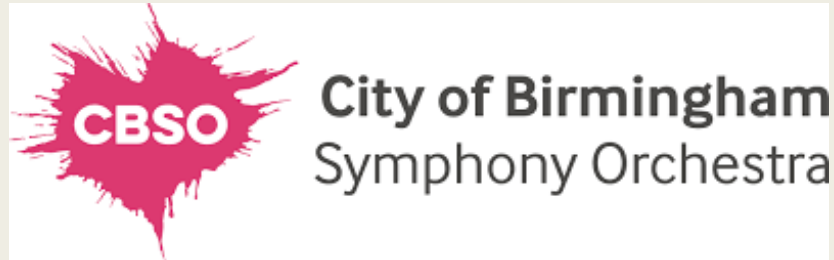


COVID: AFTER THE INTERVAL

Katy Raines – Founder – Indigo-Ltd

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TODAY

What happened to audiences during lockdown?

What do audiences want and expect from us now?

What does that mean for the future?

WHAT HAPPENED DURING LOCKDOWN?



After the Interval /
Act 2 Surveys

In Total

200K

Audience responses

In Total

>500

Cultural Organisations
from across the UK and Ireland

After the Interval – April/May

Act 2 – June/July

During
Loc`kdown

Booking
NOW` for
events

Returning
to events

Safety &
Comfort

Digital
Culture

Outdoor
Culture

Economic
Viability

During
Lockdown

After the Interval

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

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

Responses: 79,042

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

Booking
NOW for
events

After the Interval and Act 2 (April – July)

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

Responses: 84,197

Only

17%

of respondents are
booking for events

Half

of those booking are for
events from NOVEMBER

Returning
to events

After the Interval and Act 2

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: 49,357

70%

would not consider booking for events for **at least 3 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: 49,738

BUT

67%

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

Returning
to events

They don't 'get it'

Act 2

If people can travel on planes and televised football is allowed, it is unfair not to allow theatre.

I'm willing to take a little more risk than the government is likely to allow

The more I want to see a show, the more I will be prepared to take the risk of infection by attending

Just get on with it, hand sanitizer, washing etc. The seats are too crowded in most theatres anyway for people in the 21st century...

I'm willing to try and support any arts venue that is working to safely move towards performances happening.

Safety & Comfort

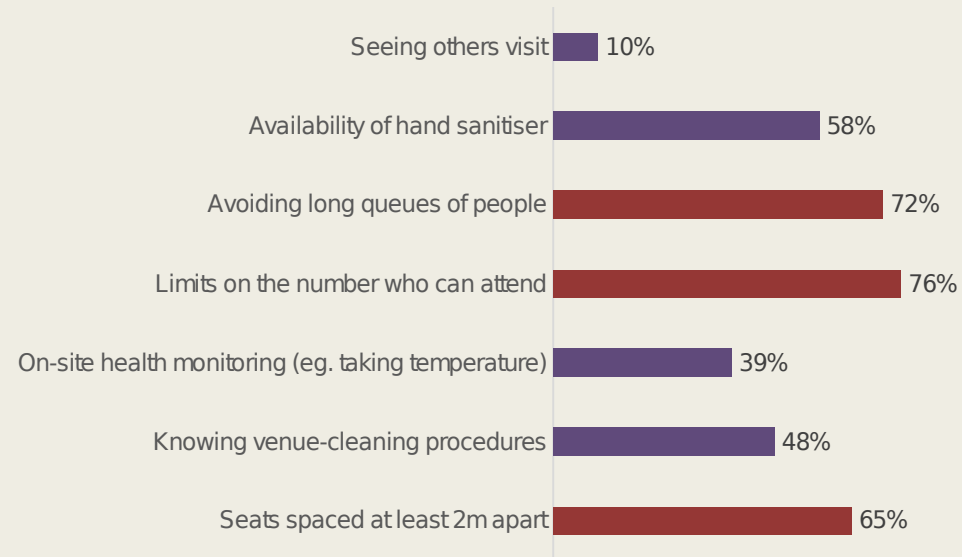
After the Interval

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

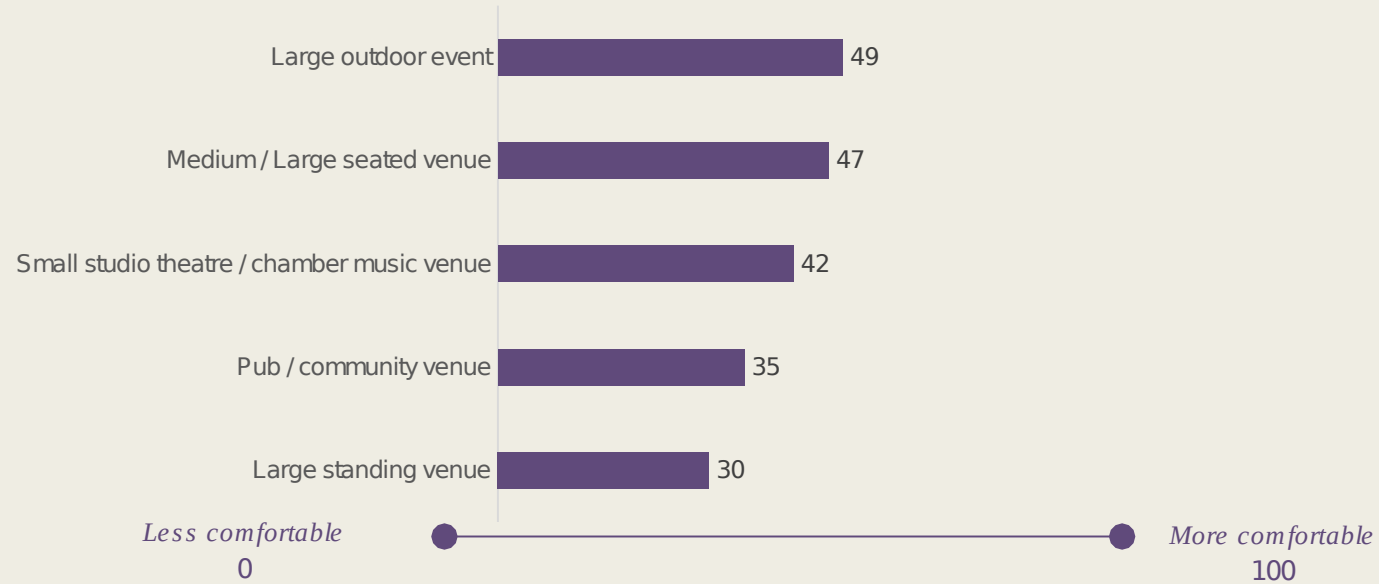


Safety & Comfort

After the Interval

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

Responses: 62,952



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

Responses: 40,510

	MORE	LESS
Performance	Household seated together Limited capacity Socially distanced seats	Daytime performances Unreserved seating
Hygiene	Hand sanitizer Covid-safe Kite Mark	Restrictions to toilet facilities
Avoiding People	Queue Management Scheduled arrival time	Audience wearing masks Public transport

Q: How concerned would you say you are about the financial survival of the organisation who sent you this survey?

Responses: 51,738



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: 51,738



Wanting us to be bold and brave

Act 2

*“We are looking forward to returning to some sort of theatre experience. If this is possible in a **different, creative** way then we welcome it.”*

*“Please be **brave** and test different options.”*

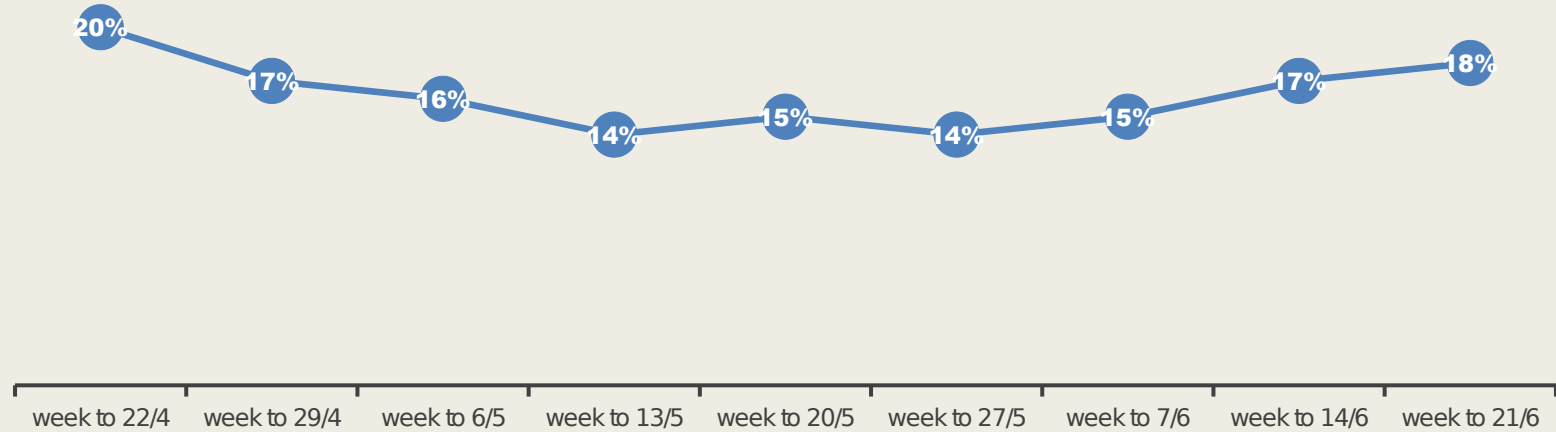
*“I hope theatres will start to show some leadership soon and make performances available in **new** ways (not just online)”*

*“Time to experiment and be **bold.**”*

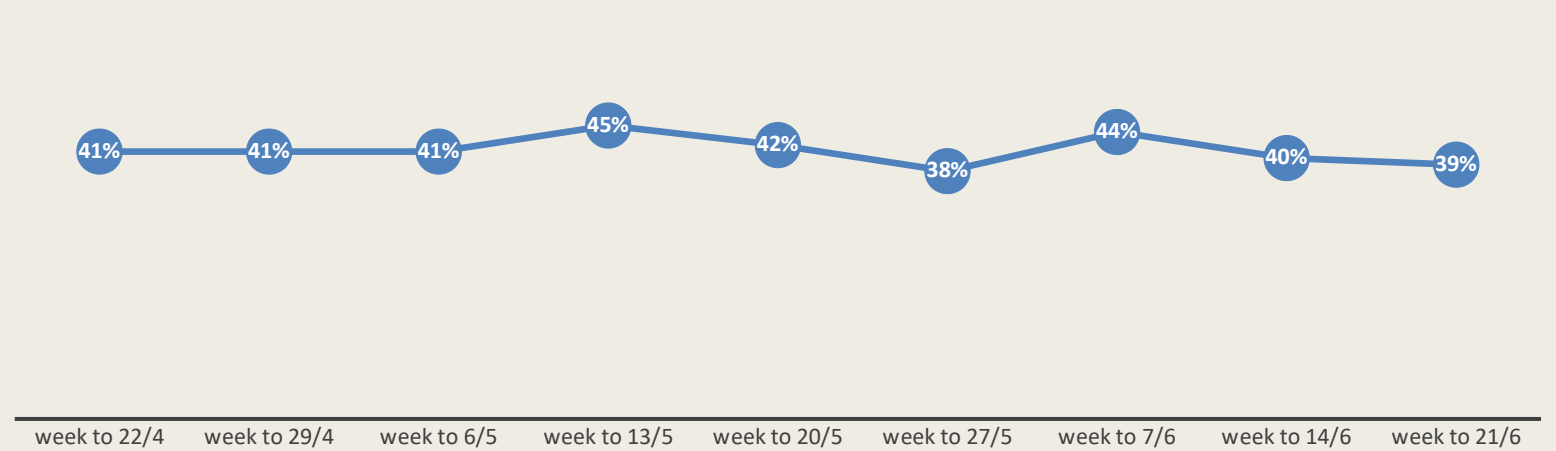
Week
By
week

Act 2

% of respondents actively booking now



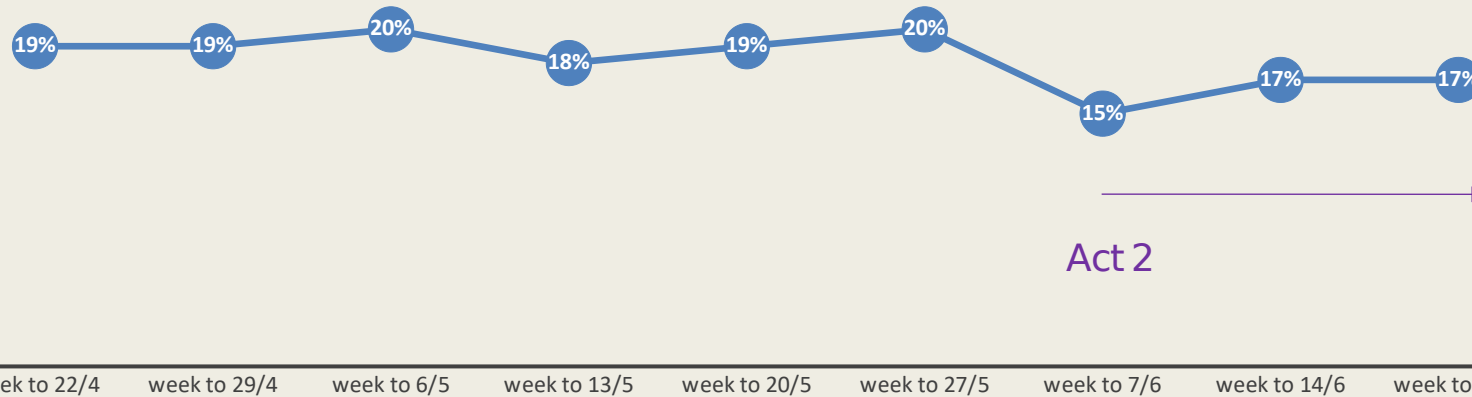
% of bookers NOT booking for at least 4 months



Week
By
week

Act 2

% who will come to events if venues re-open



Confidence about
returning seems to
have dropped

But replaced with a
desire to reattend 'at
a distance'

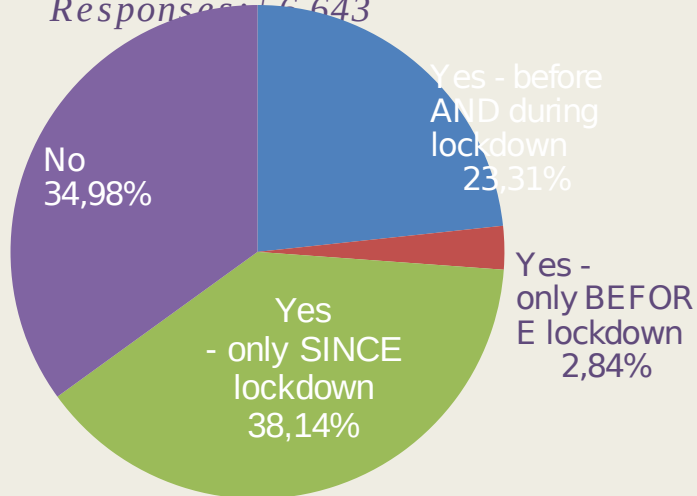
Which all pointed to....

- Venues not re-opening quickly
- Those who did would need major changes to infrastructure
- Audiences needing a lot of convincing

So....what is the answer in the meantime?

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

Responses: 56,643



65%
Have experienced culture online

<1/3
Paid or donated

Q: If you were unable to go to cultural events in a venue would you be interested in engaging with cultural events ONLINE?

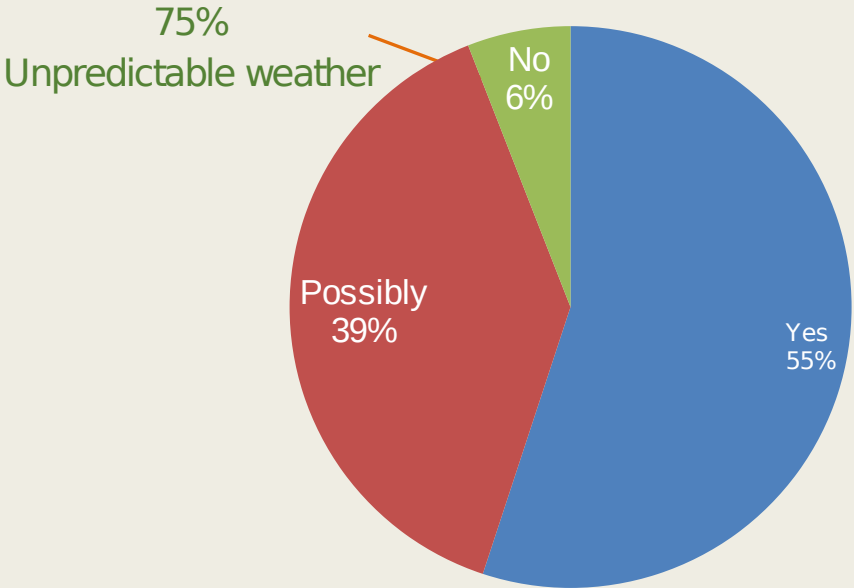
Responses: 56,132

83%

Are interested
in culture online

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?

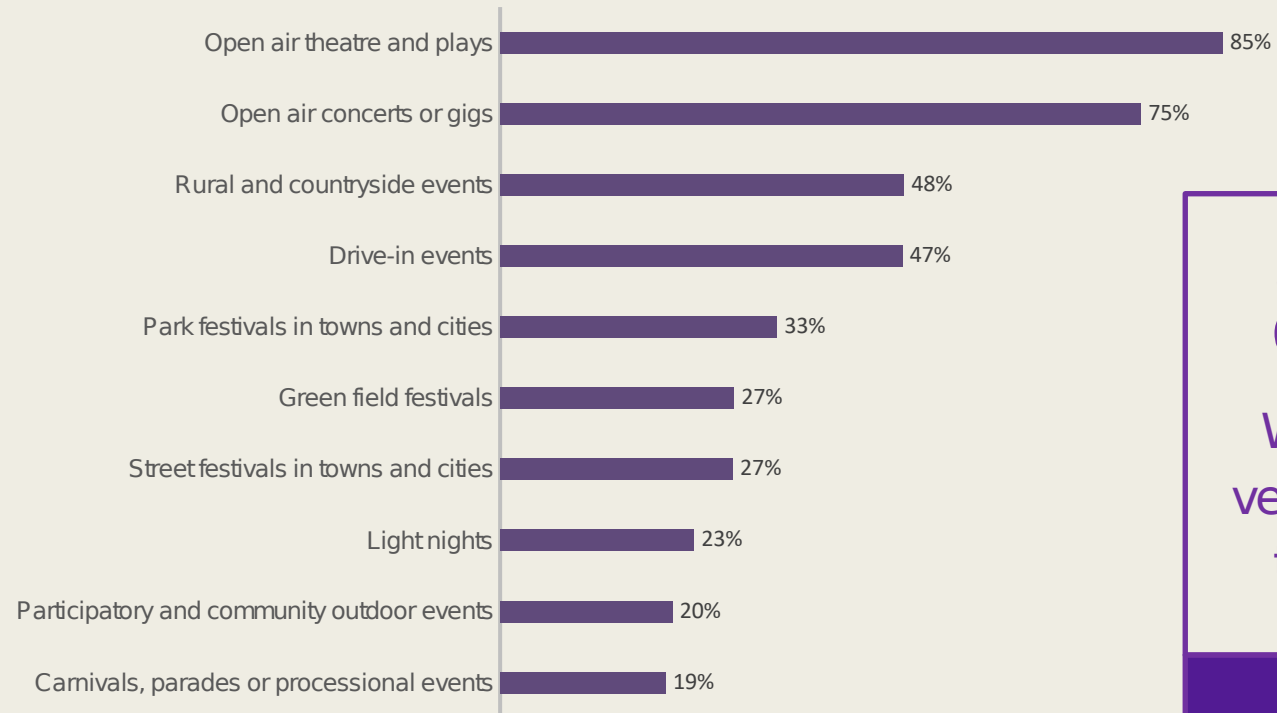
Responses: 53,739



94%
Are interested
in culture
outdoors

Outdoor Culture

Act 2



80%

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

>70%

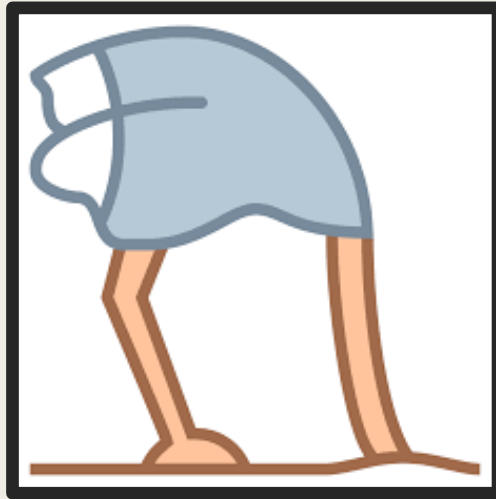
Would pay 'same as live'

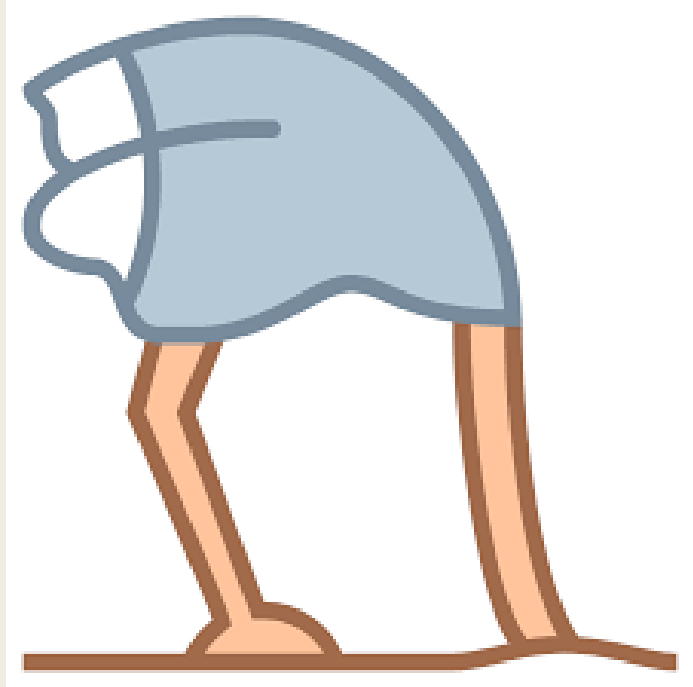
WHAT DO AUDIENCES WANT FROM US?



- What is the future for live (indoor) performances?
- How could other formats be developed that are
 - *Attractive to audiences*
 - *Financially viable*
 - *Sustainable?*

Developing new formats - my observations from the UK





MODE 1: HEAD
IN THE SAND



MODE 2: HOLY GRAIL

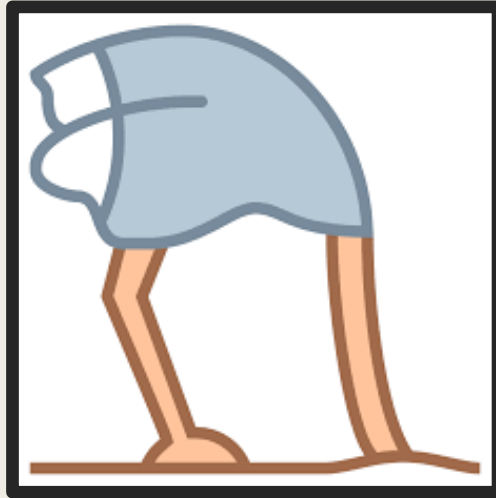


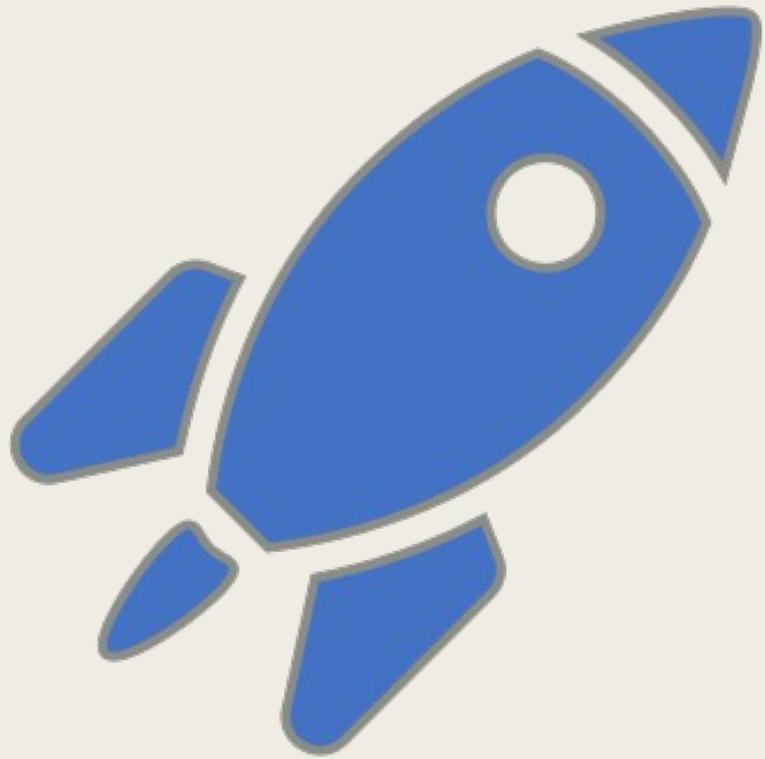
MODE 3: R&D



MODE 4:
DO NOTHING

Risk?





THE
FUTURE?.

..

Different audiences need different things

- Even pre-Covid, we knew we needed to provide different experiences for different people
- IT'S NO DIFFERENT NOW
- What do different audience segments need?

The 4 segments for Culture



New Stuff

Contemporary



Safe &
Established

Classic



Good night out

Mainstream

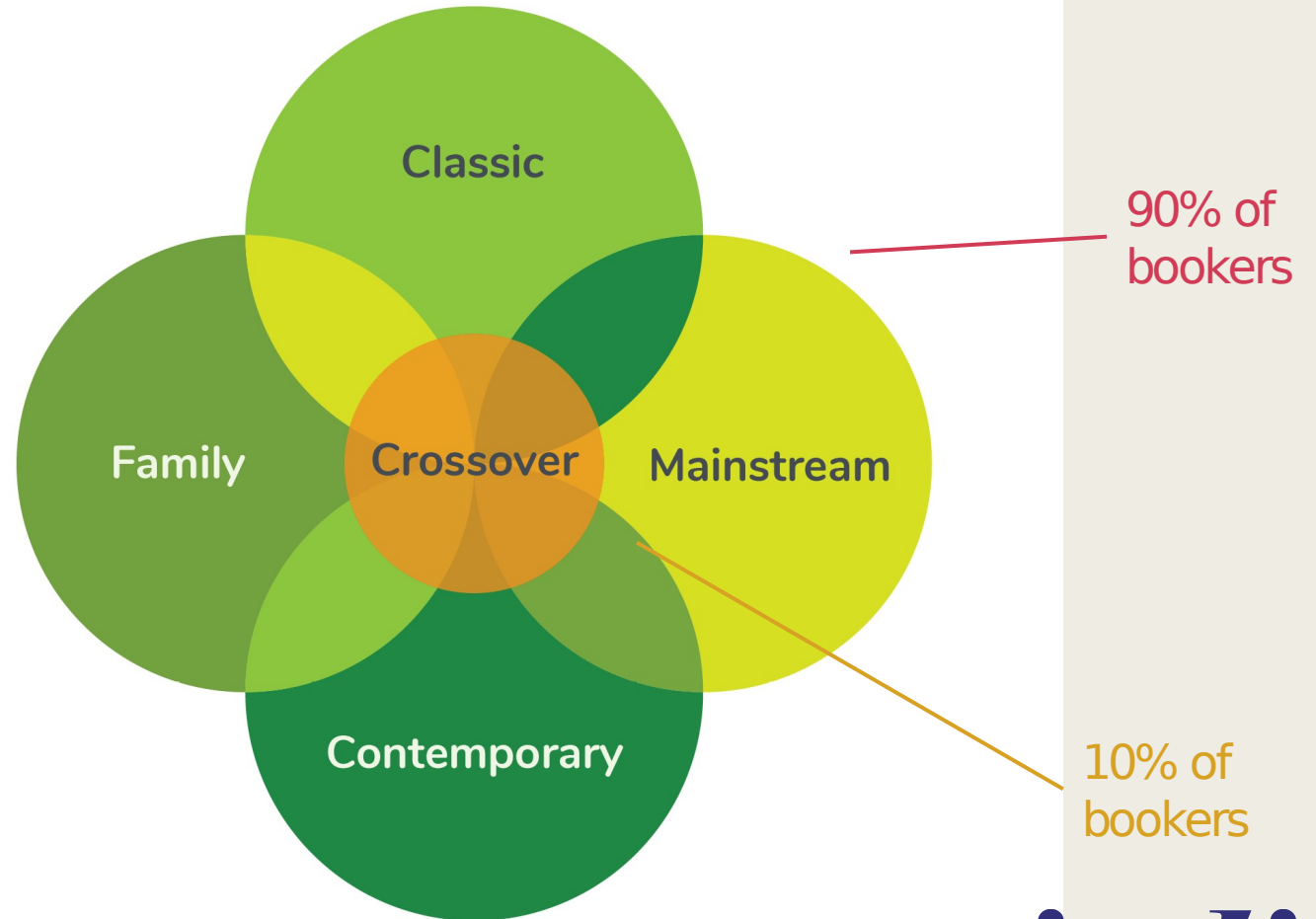


Family

Family

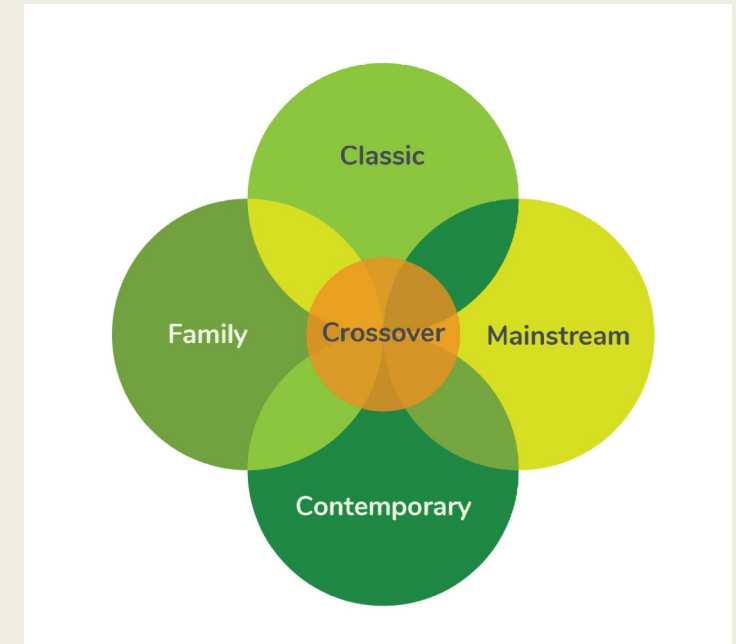
Total Audience™ Segmentation model

Audiences stick to what they know they like



Total Audience™ Segmentation model

- Which would come back to live events soonest?
- Which would embrace online experiences the most?
- What would this all mean for planning re-opening and digital content?



How the audience segments differ based on Indigo research



New Stuff

Contemporary

EXPERIENCE THINGS DIFFERENTLY

Coming back

Return soon

Content / Format

Try new formats
Want you to be brave

Digital

Engage with digital in various formats
Want 'wrap around' experiences

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DONMAR®



RECREATE THE LIVE EXPERIENCE



Safe & Established

Classic

Coming back	Wait and see
Content / Format	Want things to be as close to what they're used to as possible
Digital	Only access digital if 'like' the live experience Will ditch digital once live is back

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SHARE THE EXPERIENCE WITH OTHERS



Good night out

Mainstream

Coming back	Refunds/exchanges important Attend with other households
Content / Format	Need to know it will still be fun! (Attending for <u>social</u> reasons)
Digital	Only engage with digital if live or event-based – social interaction





PARTICIPATE AND INTERACT



Family

Family

Coming back

Reluctant to be in socially distanced seating

Content

Concerned that family content will disappear

Digital

Participation, interaction
Much higher value to this segment

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Examples or thoughts

- Escape room
- Puppet theatre/Little angel?



INSTEAD
OF....





HOW DO I GET
MY ART TO
PEOPLE IF THEY
CAN'T COME TO
A VENUE?

HOW DO I CREATE EXPERIENCES **FOR AUDIENCES** WHO WANT TO...

EXPERIENCE THINGS DIFFERENTLY

RECREATE THE LIVE EXPERIENCE

SHARE THE EXPERIENCE WITH
OTHERS

PARTICIPATE AND INTERACT

Some final thoughts

- Involving audiences in your journey is important
- Be bold – but show them your workings
- Don't lose your personality or identity
- Keep the essence or 'fun' in the brand
- Keep monitoring and listening



THANK YOU

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