**Family Audiences may be first to re-embrace culture… but the last to be considered**

Indigo’s recent *After the Interval* and *Act 2* surveys asked audience members about their attitudes to missing live events during Covid-19, how they were engaging with culture during lockdown and when they anticipated returning to live events in the future.

The [Family Arts Campaign](https://www.familyarts.co.uk) and Indigo have now worked together to look specifically at responses from family audiences – with some revealing results.

Whilst many family audiences had much in common with other regular and frequent culture-goers, there are a few key areas in which they differ significantly, and which may hold some clues for venues, producing organisations, and those creating digital content.

We are pleased to share the headline findings today. For the full findings, join the [Family Arts Campaign webinar](https://www.familyarts.co.uk/training-events), in partnership with the AMA, on Tuesday 13 October at 10.30am. Read on for our five key areas to consider when welcoming back family audiences. 🡪

**1. The panto effect**

* **55%** of family bookings were for events in November or December 2020
* Only **11%** expected the event to be postponed – compared to **24%** of general respondents

It is clear from the data that most of the families in our survey had already booked for Christmas shows, or other events around November and December.

Astonishingly, even in July, 80% of these bookers expected these events to go ahead – albeit with some element of social distancing – but very few expected the shows to be postponed or cancelled.

*“Visiting the theatre at Christmas has become a part of* ***our family tradition****. It would be a shame to lose it.”*

The challenges facing our sector are 1) how do we ensure we are communicating any changes clearly and responsibly for families; and 2) how do we maintain the relationship with these audiences, if our Christmas events are postponed or cancelled?

We know that many family audiences visit our theatres and venues once a year – regularly and religiously – but still only once a year. Although we try to entice them back again to attend further family shows, this can have limited success.

Once these families have broken the habit of coming to panto or the annual Christmas show – probably with grandparents and an extended family group – what will they replace that with this year, and how will we get them back again in the future? More pressingly, what can we offer them in the meantime?

**2. Price sensitivity**

* **32%** of family bookers had seen a reduction in their income due to Covid-19
* Family bookers were more likely than general respondents to book if a refund (**+7%**) or credit note (**+9%**) was available.

The data shows that this audience segment, whilst the least likely to be vulnerable in health terms to Covid-19, is the most affected by a reduction in income as a result of the pandemic.

*“I want to try and support theatres and live events as much as possible because* ***I enjoy these and so does my little boy*** *and I want them to survive but I will need to be careful with money as* ***my partner has no work and our income has dropped*** *at present.”*

Unsurprisingly then, this group is the least likely to have made donations and to place most importance on refunds and exchanges when looking to book tickets for future events. They are however, happy to continue paying full price for activities offered virtually and remotely, with families being more willing than any other segment to pay a similar price for an online experience as a live one.

**3. Indoor social distancing doesn’t work for Family Audiences**

In general, families seem less willing to attend venues with social distancing measures in place – not because of safety concerns, but simply because adhering to set rules could add a further level of ‘stress’ to what they already consider to be quite a palaver.

Trying to ensure that children ‘socially distance’ whilst sitting in seats and then having to queue longer for toilets, is possibly a step too far for a lot of parents.

*“****Keeping them in a seat is hard enough*** *work at the best of times!”*

*“We mostly attend family events with our young children who* ***don't really understand social distancing****. It would be fairly difficult and stressful.”*

Others felt uncomfortable about their children seeing an auditorium of people wearing masks, or being subjected to health checks on arrival. With face masks now being mandatory for visitors to indoor settings, this could prove difficult when welcoming different age-groups into a cultural space.

*“The current system of social distancing and people following you around cleaning is* ***very stressful*** *and therefore I would prefer to wait until the situation settles down rather than having to either* ***subject myself or my child*** *to all of this.”*

***“Masked events would not work*** *for the children who are at the start of their theatre experiences.”*

**4. Digital content for Family Audiences**

* **Less than ½** of family audiences have experienced culture online during lockdown – compared to 62% of general respondents
* However, **75%** are interested in trying it out in future

If families will be reluctant to come back to venues quickly, what about digital content? At first glance it seems that families are less of a market for digital content, with less than half having engaged with online culture, compared with 62% for all respondents.

However, what is clear is that families are looking to fulfil a very different need when it comes to online culture. Whilst fewer had watched a full length production online, almost ½ had taken part in a creative or participatory activity via virtual means.

*“I have really enjoyed watching theatre performances online with my primary aged children. They have enjoyed* ***making tickets and posters*** *beforehand and we have used some of the education packs when available. We have seen plays we would* ***not have been able to afford*** *to go to as a family if at the theatre.”*

Comments illustrate that families value online experiences they can do as a family if they are participatory in nature, and ideally involve some level of recognition or interaction. Innovation, testing, and assuming some sense of trial and error will be crucial in ensuring that organisations and artists maintain that sense of connection that comes from an in-person cultural experience. The Family Arts Campaign recently delivered a [webinar](https://www.familyarts.co.uk/2020/07/webinar-recording-content-thats-engaging-and-accessible-for-families/) discussing important access points to consider when developing digital content for young children and will be producing more resources around this area in future.

*“Online events I think need to be* ***interactive*** *in some way… I am looking for something where there is feedback / presenter is acknowledging me and my presence. That for me is* ***why I would pay*** *for gym classes rather than get free ones or do certain kid’s classes.”*

**5. Families are comfortable outdoors**

* Family bookers are **9%** less likely to have previously attended outdoor arts events than other general respondents
* However, **96%** would be interested in trying outdoor events in future (**2%** more than general respondents)

Family audiences were much more likely than any others to embrace the widest possible range of outdoor arts activity, finding the full range of outdoor styles and formats appealing (unlike more classic audiences, who were looking to replicate their ‘in-venue’ experience as closely as possible).

*“I feel that outdoor events would be* ***great*** *- and I would have* ***total confidence*** *in coming especially for children.”*

Whilst they have concerns about toilet facilities being readily available, families were much less concerned about the British weather or having to stand up for any length of time.

*“I would love to see some* ***outdoor, family-orientated, socially distanced*** *daytime performances in the coming few months, I’d be happy to pay the same as for an indoor performance... we are* ***fed up with screen time****.”*

**A willing and important audience segment at risk of exclusion**

Uniquely, family audiences recognise the sense of urgency in providing cultural experiences for children, whose creative development is vitally important to them.

*“[Children are] missing out on seeing these live performances at a stage of their development when they can gain a great deal of* ***inspiration and enrichment*** *from them”*

*“The cancellation of… live events has been a* ***huge loss to me and my small child*** *- this will never be recovered as she is only 3 and this year we had many plans to attend events regularly that she would appreciate more. I feel extremely sad at this loss.”*

They are worried that family groups won’t be top of the list when organisations are making plans for reopening.

*“Our main concern in returning is that there will be* ***more performances directed at adults****.”*

Cultural organisations have an opportunity to develop interesting and interactive experiences for families, particularly around digital and outdoor activity. The data suggests families are more interested than ever in arts and cultural experiences – they are actively looking for things to do in person and online, and they are prepared to pay.

**Join the webinar**

For the full findings, join the Family Arts Campaign webinar [Welcoming back Families](https://www.familyarts.co.uk/training-events), in partnership with the AMA, on Tuesday 13 October at 10.30am. [Register now](https://www.familyarts.co.uk/training-events).

Download the full [After the Interval and Act 2 survey reports](https://www.indigo-ltd.com/covid-19-after-the-interval-national-audience-survey).

**About *After the Interval* and *Act 2***

Indigo’s *After the Interval* and *Act 2* surveys ran between April and July this year. It asked over 200,000 audience members about their attitudes on missing live events, how they were engaging with culture during lockdown and when they anticipated returning to live events in the future.

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, Indigo encouraged organisations to send the link to a sample of their recent and frequent attenders to build up a picture of engaged cultural audiences. Participating organisations were predominantly theatres and arts centres and also included concert halls, festivals and ballet or opera companies.