

house network: Annual Members' Survey

Results and analysis
July 2023

About Indigo



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Indigo Ltd is an award-winning research and insight company working primarily in the arts, culture and heritage sector. We pride ourselves on our collaborative, consultative and pragmatic approach, providing sensible solutions which give our clients the confidence to move forwards.

We specialise in projects involving research and evaluation, marketing, audience development, branding, strategic planning and organisational development. We have recently delivered sector-wide projects including being the lead evaluator of the Birmingham 2022 Festival. Indigo Share, our collective approach to audience insight, offers a flexible and affordable range of audience research products and builds on our large-scale collaborative research during Covid including *After the Interval, Act 2* and *Missing Audiences*.

Find out more: indigo-ltd.com

Survey overview

- Survey ran **22 June – 4 July 2023**
- Sent to **152** house network contacts
- **45** responses (40 complete, 5 partial)
- **29%** of contacts took responded

Question areas

- About the organisation
- Programming
- Audiences
- Support and development for artists and community arts groups
- Engaging with house network
- Staff and training needs
- Plans and policies

KEY FINDINGS, NEEDS AND OPPORTUNITIES



Key programming differences between 2022 and 2023

The main **differences between 2022 and 2023** are:

- Lead times for programming decisions **are now shorter**
- Organisations are **more reliant on using tried and tested relationships with artists**, as well as continuing to see live performances (is this about reducing risk?)
- Programming of comedy, outdoor work, workshops and dance **have all increased**, whilst film has decreased.

*Less appetite for **very serious subjects**, seems like less risk is taken by audiences (care with what they spend on) - comedy and light-hearted subjects popular*

*We are **having to include more commercial shows** in order to balance out budgets as theatre, dance and circus are harder to sell and often make a loss. We see audiences playing it safe in their choices,*

Programming

- The barriers to programming other things are largely **financial risk (44%)** and not being **confident in finding an audience (36%)**.
- There is no difference overall in the number of days/weeks programmed BUT, those who have decreased their output say this is because of **low sales (58%), lack of audience demand (50%) or lack of funding (50%)**
- Over half the respondents are programming international work, largely in order to diversify their audiences or stage work by audiences from different backgrounds (**81%** cite these as the main reasons for programming this work)

*We have been doing a bit **less of the 'one night only'** studio scale theatre stuff, **and investing more** in slightly **bigger scale theatre sitting** in the space for longer and building more engagement around it - so less of it (and doing more one of comedy/music events around these). Still similar in terms of programming family work.*

*We have **always** programmed work seen as **'difficult' or risky** - our issue is that our NPO agreement **does not cover programming** so that work has to be affordable for us.*

Audiences

- In 2021 **43%** said they had an **audience development plan**, reducing to **37%** in **2022**, and is now **45%**. However, $\frac{1}{2}$ of these plans were developed more than a year ago.
- The focus of these plans is **mostly on growing the audience overall** and attracting new attendees. There is the least focus on developing volunteering or feeling more connected to audiences.
- All feel that they are **fully or partially delivering their audience development plans**, and over $\frac{1}{2}$ say they have seen an increase in new audiences as a result.
- Of those who don't have one, the main reasons are that they currently working on one (**41%**) or they don't have capacity to produce one (41%). There are no comparisons for this with 2022.

*People are booking later, lots more **single tickets** being sold, more **local audiences** (people travelling less for performances)*

*Our **surveys have really helped us to better understand** their feelings and needs - unfortunately working with Audience Agency across the NPO decision period has meant that **we've lost access to all of the written feedback** that audiences gave us to the surveys - so now all we have is the raw data.*

Support and development for artists and community arts groups

- Only **5%** of respondents **were not offering any support to artists or artists groups**, and where the support was offered it was most likely to be in the form of free or subsidised space for rehearsals and events.
- Fewer are supporting productions financially, offering residencies or production support - but significantly more are offering training.
- Intentions for the future show a concerning trend in terms of **working with local artists**: in 2021 **87%** of respondents planned to do this, reducing to **82%** in 2022, but now **67%** in 2023.
- Only $\frac{1}{3}$ of respondents have a strategy for supporting artists and practitioners (new question), and those who haven't cite lack of funding or staff as the main reasons.

*[house can help with] **Introductions to artists and groups.** The lack of funding and support in the surrounding area has meant many are moving away.*

*We have **good relationships** [with artists] **but lack funding to offer any monetary support**, which is what artists really need. I have no idea how house could help with that, however.*

Engaging with house

- The **email newsletter** continues to be the main source of communication that members engage with (**89%**), with slightly fewer citing direct communication or the website. Social media potentially looks weaker, but hard to compare as questions are different this year.
- The main benefit to members is the way in which House **connects them with the wider industry (78%)**. The proportion of respondents saying that House helps them programme a more varied and diverse range of work has reduced significantly.
- In terms of what members want from House in the future, **programming recommendations** is still the highest (**69%**) followed by **training** (webinars, staff training) and help in **developing plans** around **anti-racism and sustainability**.

Recommendations for programming is always helpful, especially when people have been able to see the shows.

[house could provide] Insight on industry trends, innovations and approaches

Engaging with house (comments)

cluster meetings could include meetings with venues based on scale/operational context - we would benefit from meeting with other small scale/independent venues in the area. meeting with mid-scale school-based/LA-run venues isn't super helpful in our context as we don't understand each other.

*I would also like to see more focus on **programming** within these meetings - professional touring performance (particularly theatre/drama) is really struggling post-Covid, especially for Receiving House venues - it would be useful for us to acknowledge this and discuss if there's a shared approach to this type of problem (especially at a small-scale/development level) - **many of us aren't in a position to build touring partnerships** like the major regional touring venues (Cambridge Arts/Bath TR/etc) - but i bet that we're all considering how **we could develop more work in house** and look to take that work to similar sized venues within the region (i know we are)*

***Wider staff training** in areas that are emerging as issues -e.g in **communicating trigger warnings** or content to audiences without putting them off! **More networking** between venues and opportunity to share programming of shows regionally.*

*Better **marketing assets** is key to this. There are some amazing shows out there which won't sell because their marketing is terrible and audiences will only take a risk if they can see it's worth it*

Staff and training needs

- **71%** of respondents have **more than 10 volunteers** working with their organisation (up from **67% in 2022**).
- The average FTE numbers for marketing have fallen by **20%** with an average of **1.9** FTEs in marketing (compared with **2.4** in 2022). Organisations have also seen a fall in the number of Programming staff (**1.4** in 2023 compared with **1.8** in 2022).
- Respondents reflect **more stability** in their expectations around staff changes, with **61%** expecting staff levels to **remain the same** (this was only **39%** in 2022).
- Staff training needs have increased in terms of staff health and wellbeing (**61%** compared with **47%**), but there is still a need for training in environmental sustainability (**63%**), audience development (**55%**) and EDI (**55%**).

*[Staff turnover being an issue] It never used to be, but after COVID this seems to have **become an issue to find staff who want to commit at the salary** we can offer*

***Production staff have been difficult to source** since the pandemic, many team members have left due to the difficult financial environment and uncertain future in the arts*

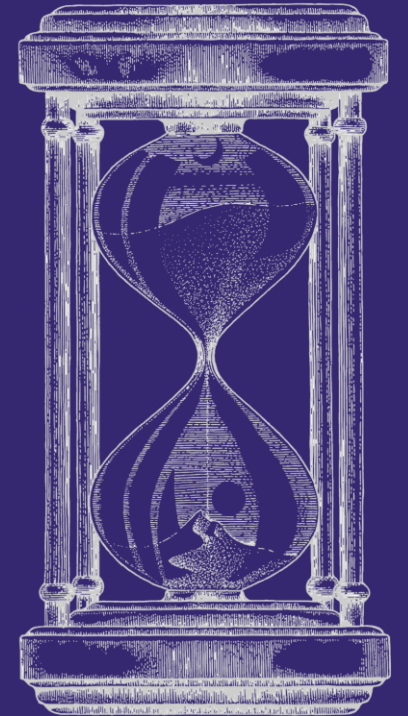
Plans and Policies

- EDI - $\frac{3}{4}$ of organisations have an EDI policy (consistent with 2022 (**76%**) and 2021 (**79%**))
- Environmental Sustainability - only **51%** of respondents had a plan in place, and this has reduced from **60%** in 2022.

Funding and Financial Resilience

- The main difference in funding is from local councils / economic partnerships: in **2022 73% had funding** from these sources, but in 2023 **this has reduced to 56%**.

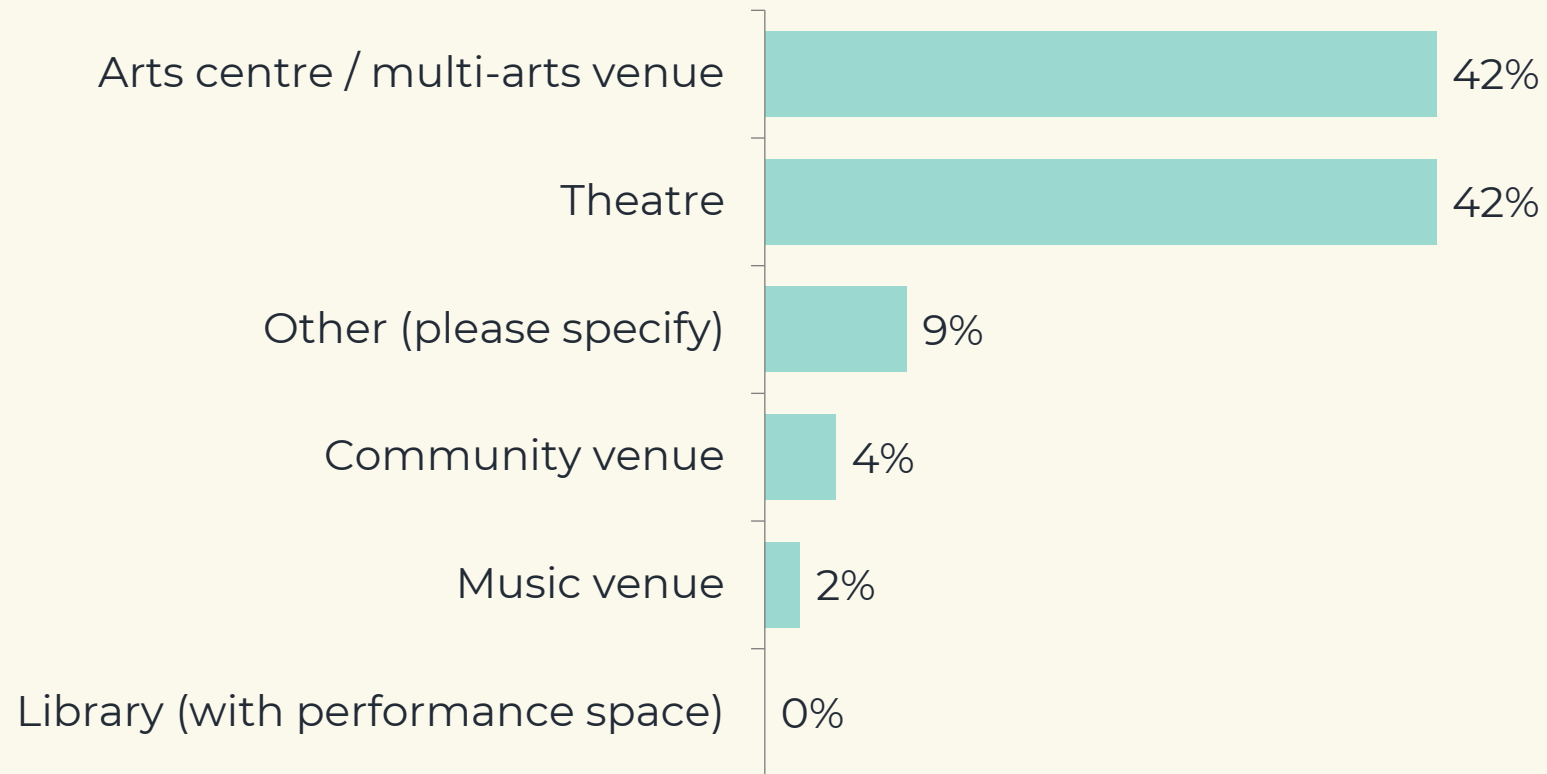
FULL RESULTS



About your organisation

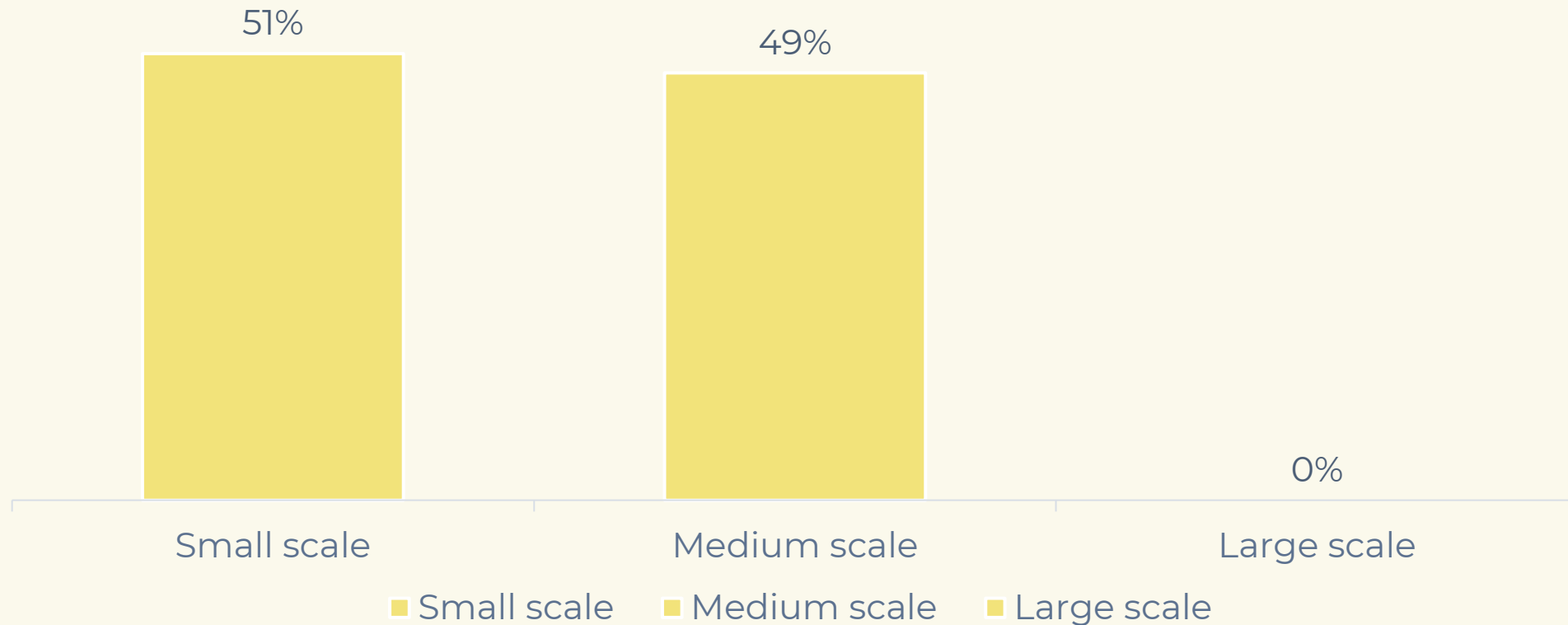
Which of these options best describes your organisation?

Answered: 45 Skipped: 0



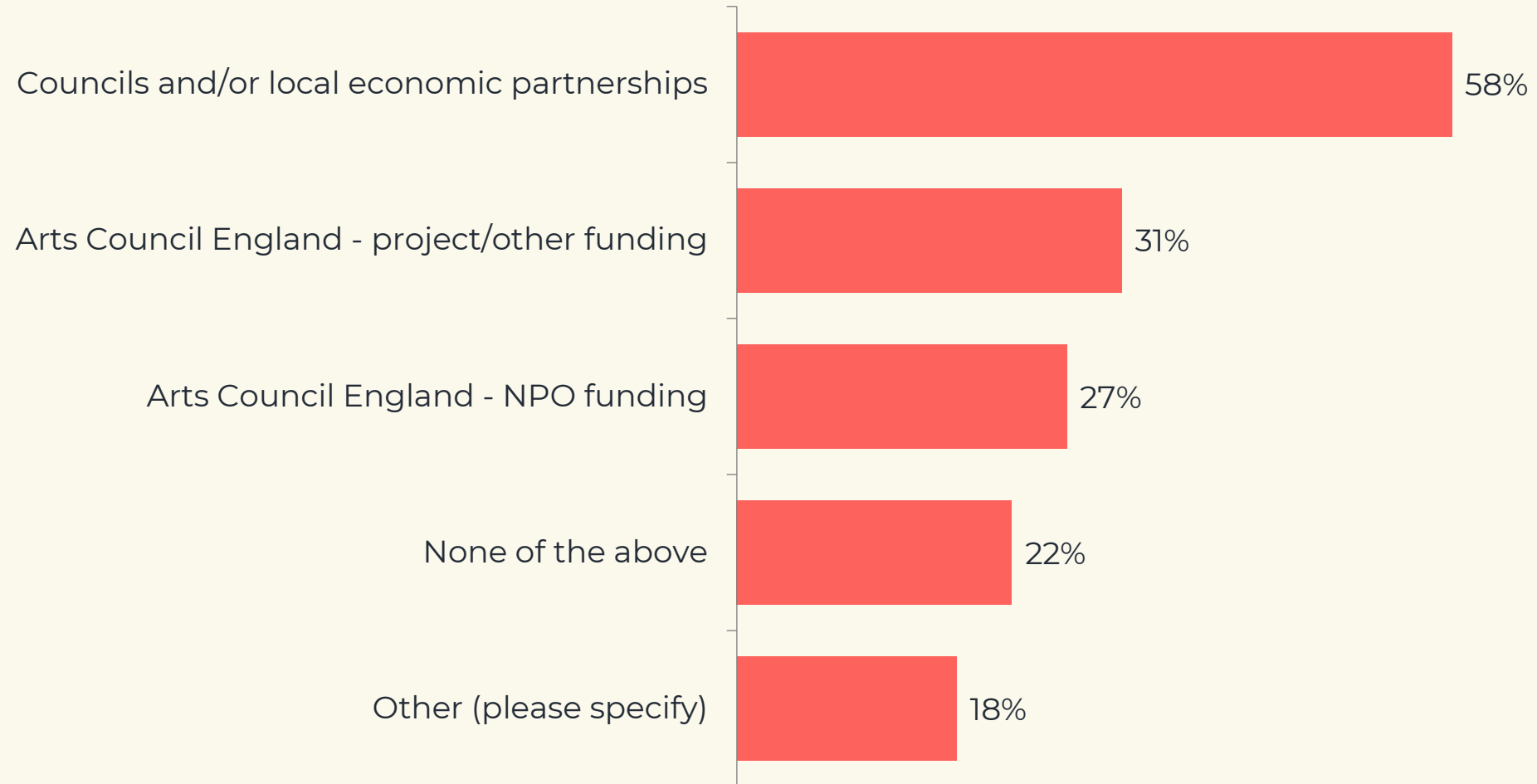
Which of the following best describes the size of your organisation?

Answered: 45 Skipped: 0



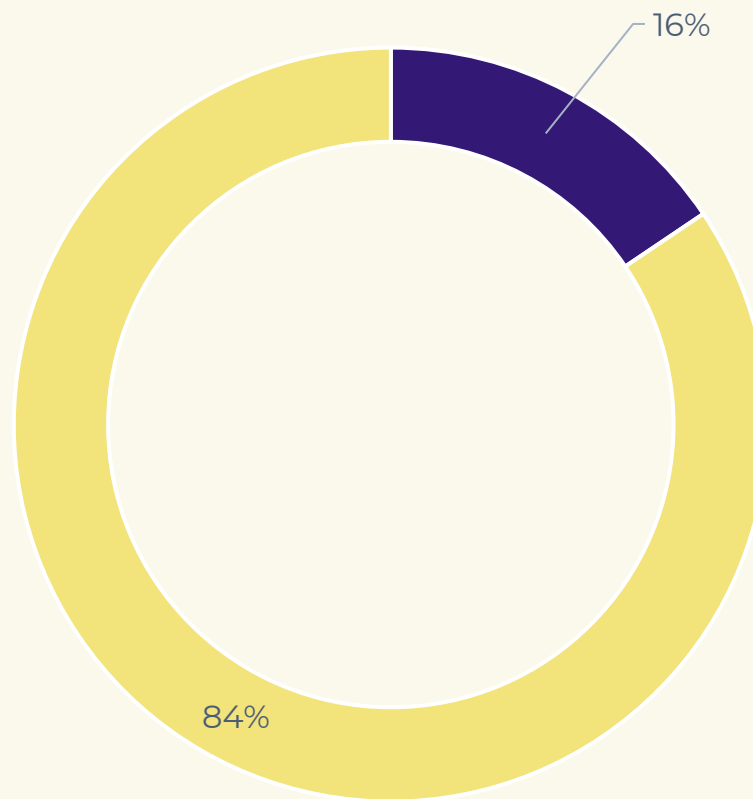
Do you receive funding from any of the following sources?

Answered: 45 Skipped: 0



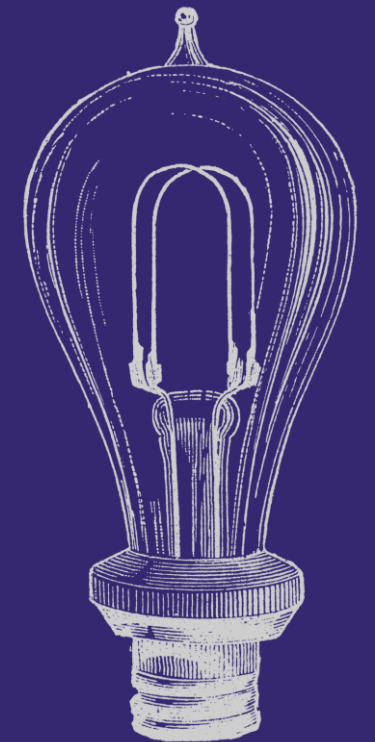
Is your venue on a campus or part of an educational institution e.g. a school or university?

Answered: 45 Skipped: 0



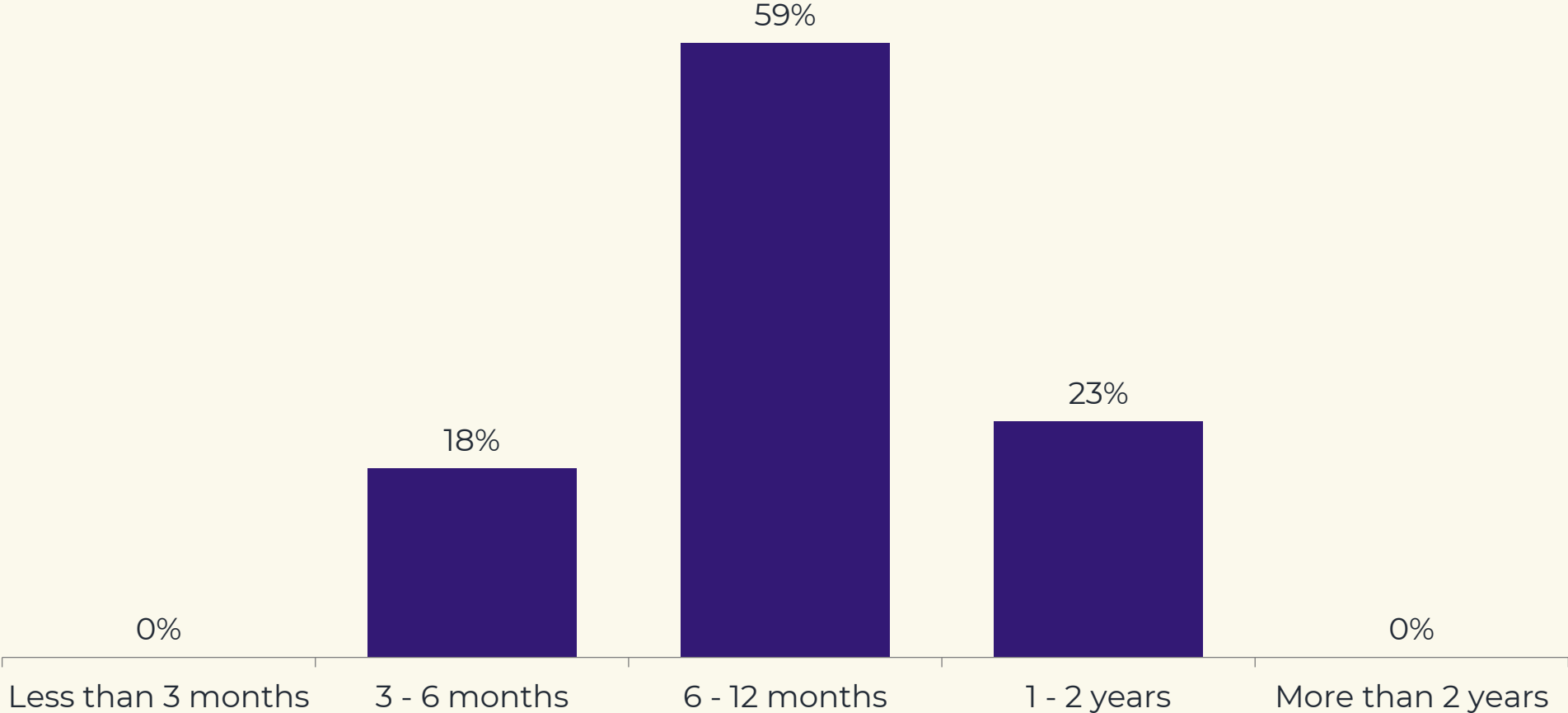
■ Yes ■ No

Programming



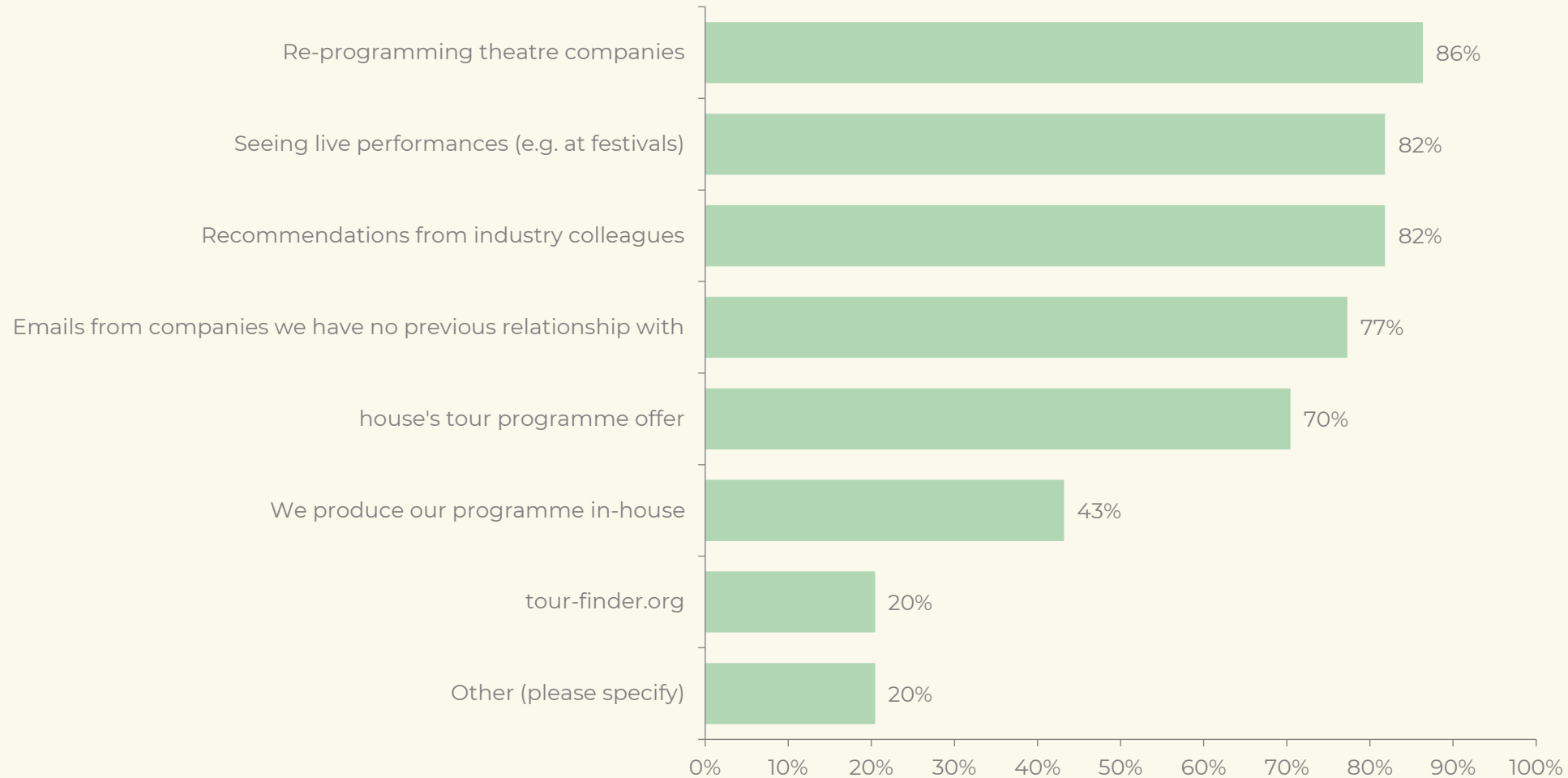
How far in advance do you tend to book your programme?

Answered: 44 Skipped: 1



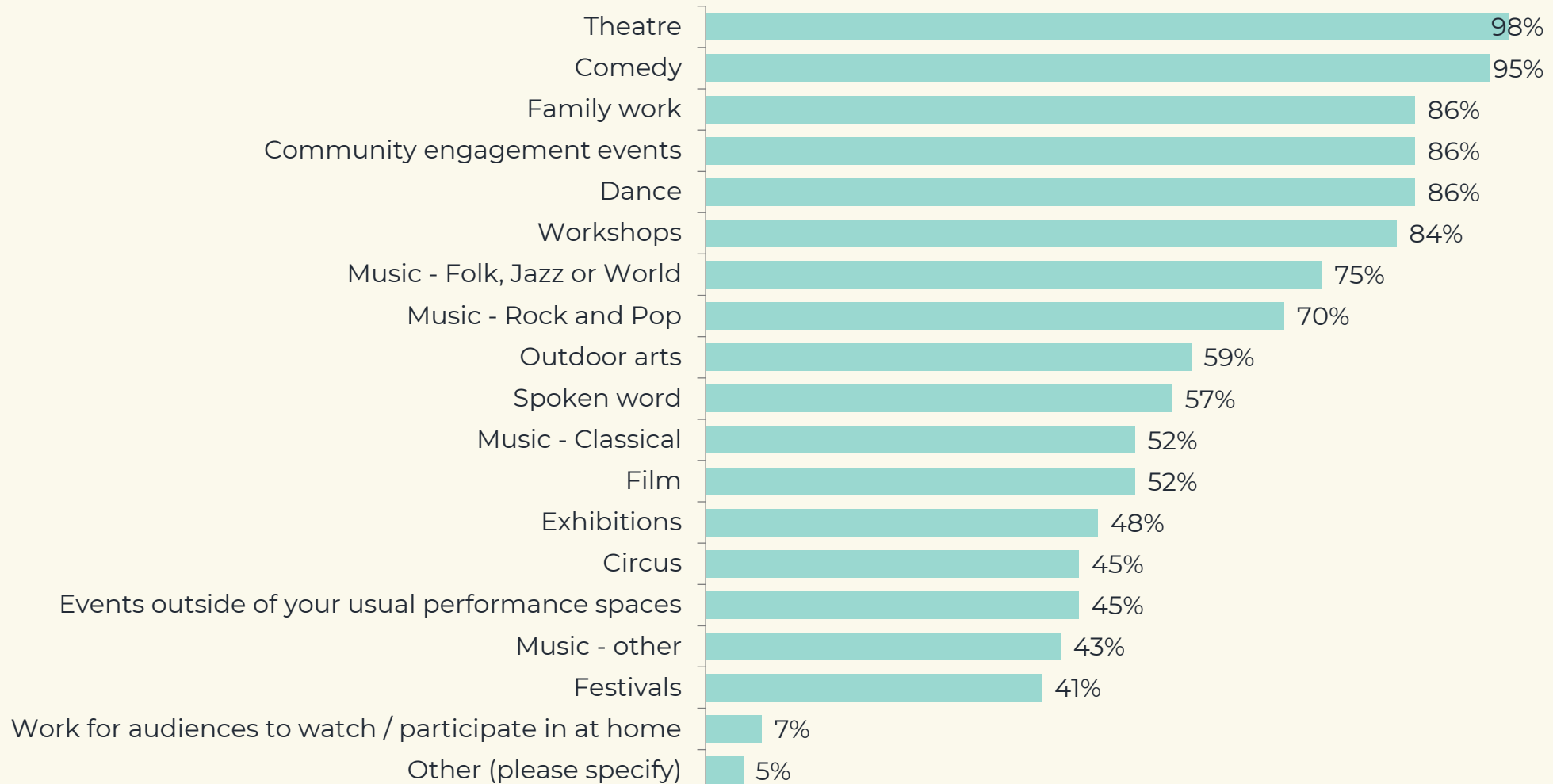
How do you tend to source your programme?

Answered: 44 Skipped: 1



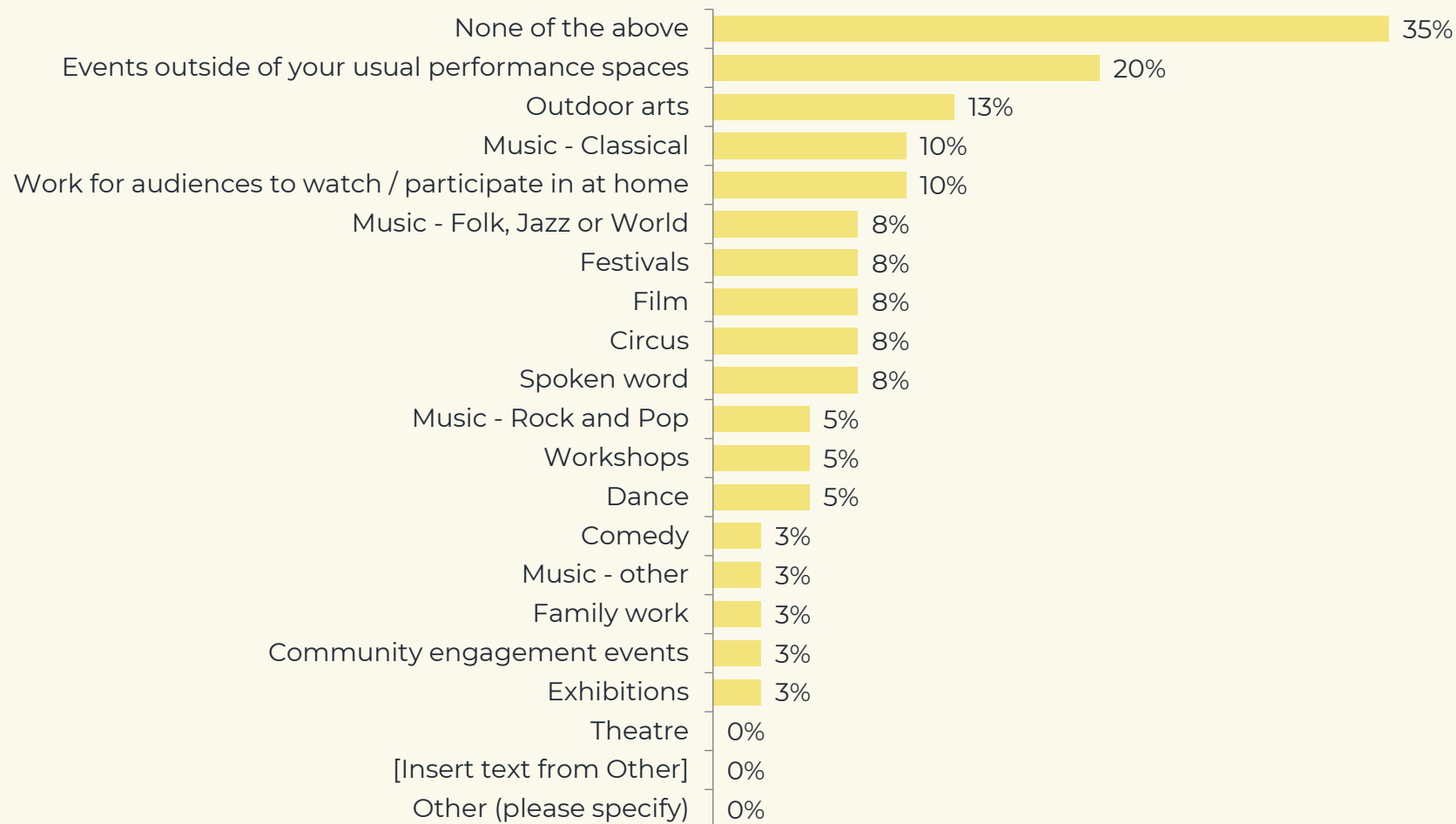
What type of work do you produce or programme?

Answered: 44 Skipped: 1



Of the types of work you are NOT currently producing or programming, do you plan to produce or programme any of these IN THE FUTURE?

Answered: 40 Skipped: 5



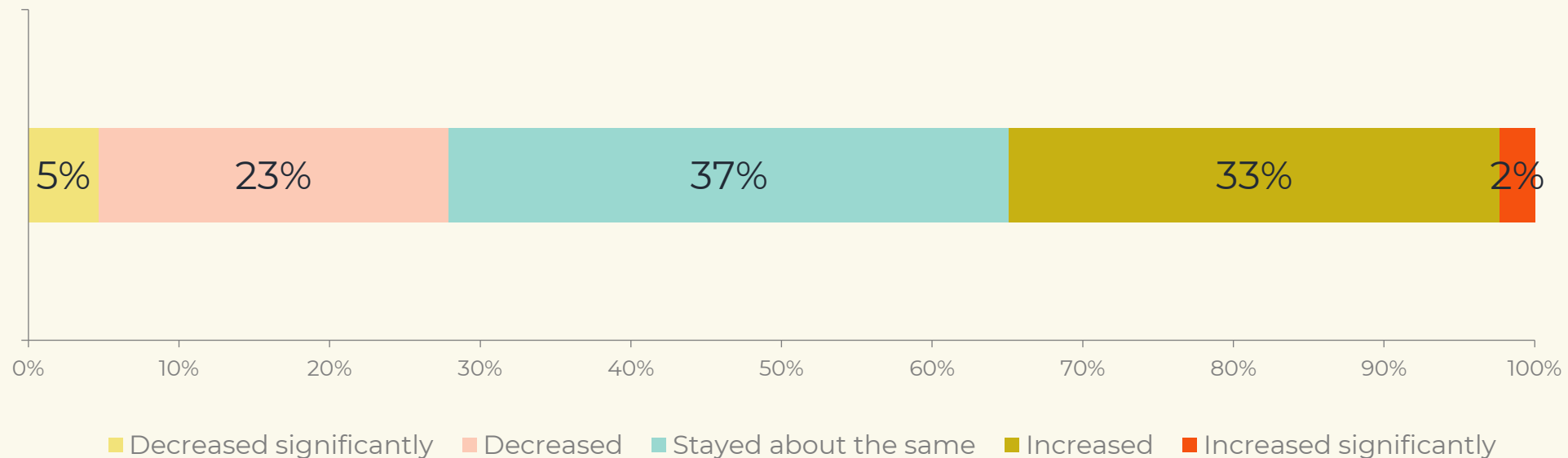
Is there anything in particular stopping you from programming these types of work now?

Answered: 41 Skipped: 4



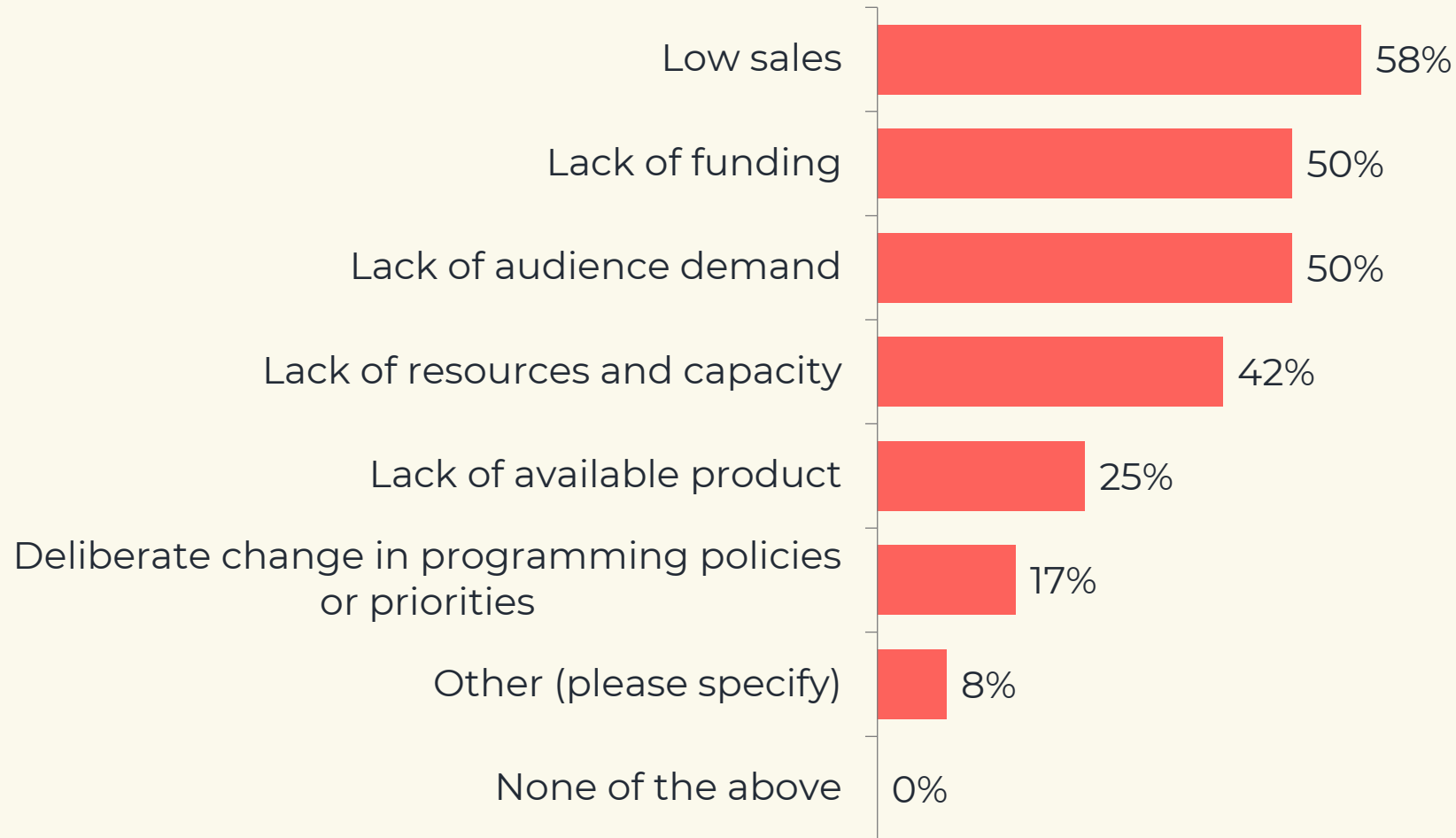
Compared to 2019/20, would you say the number of days or weeks you are programming live performances across the year has increased or decreased?

Answered: 43 Skipped: 2



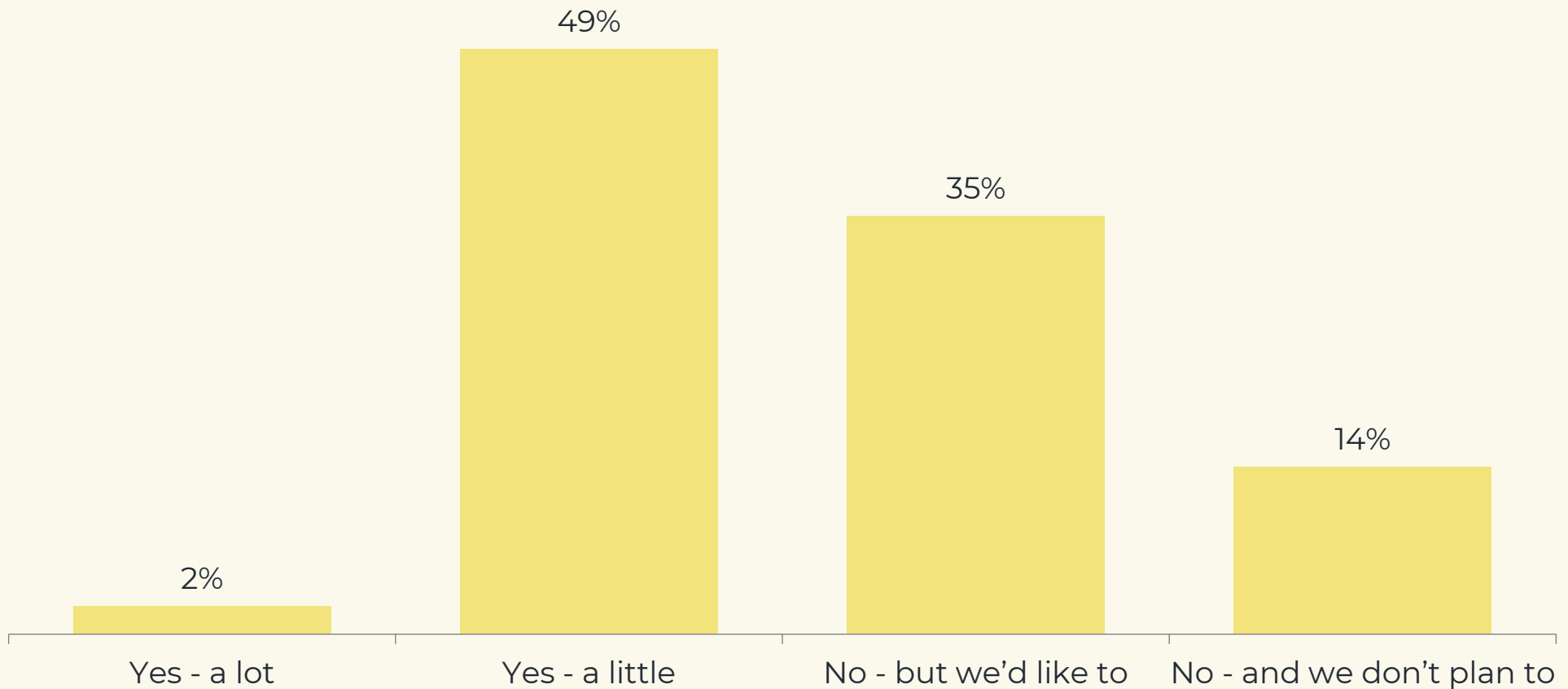
Are any of the following reasons for why your programming has decreased?

Answered: 12 Skipped: 33



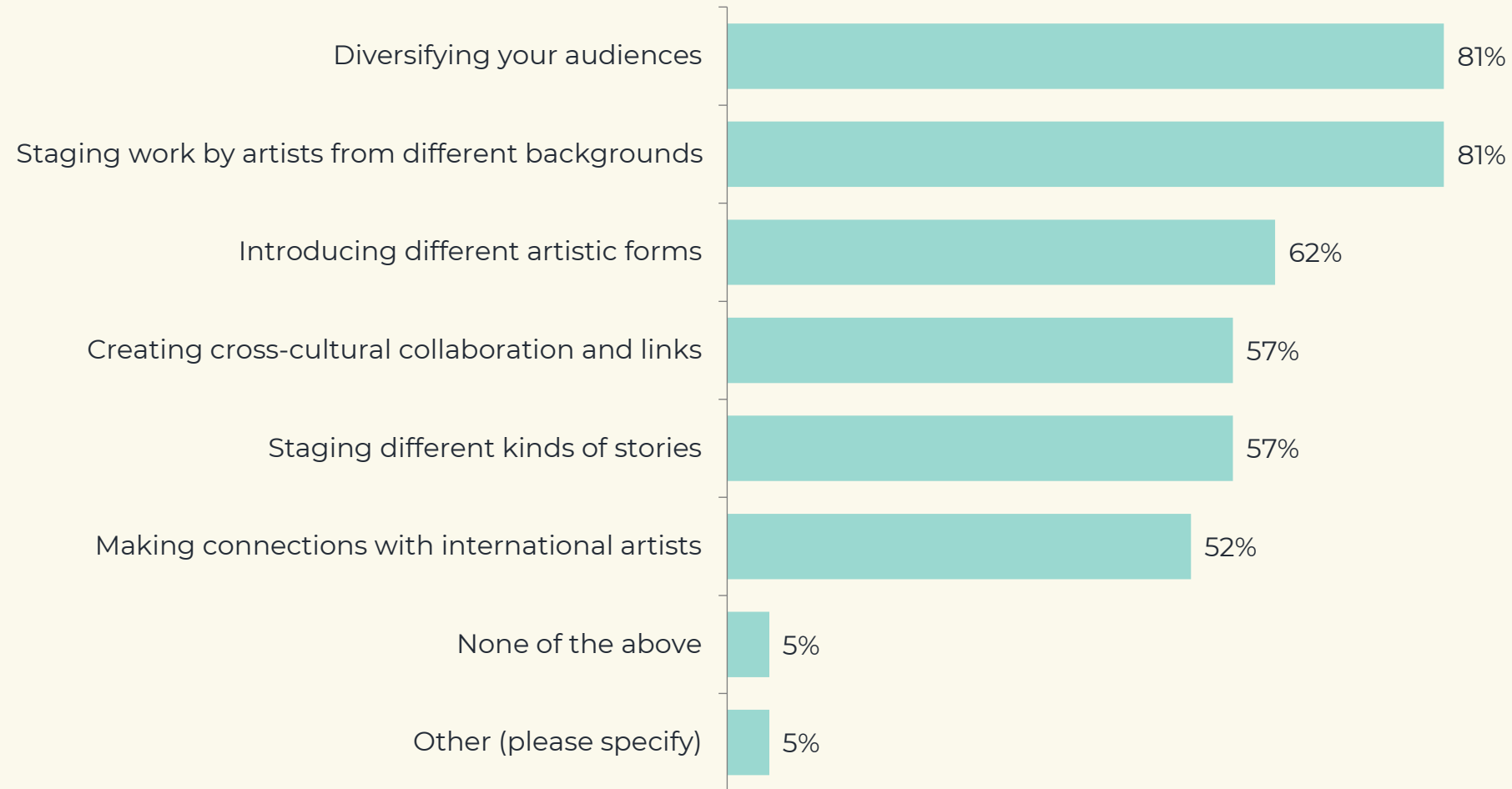
Do you programme international work at your organisation?

Answered: 43 Skipped: 2

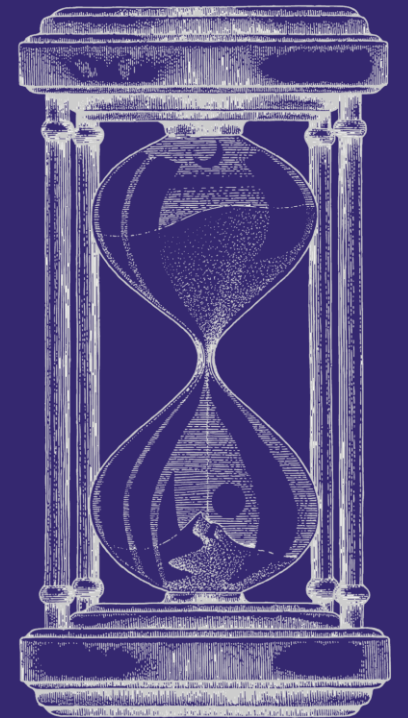


Which of the following are important to you when programming international work?

Answered: 21 Skipped: 24

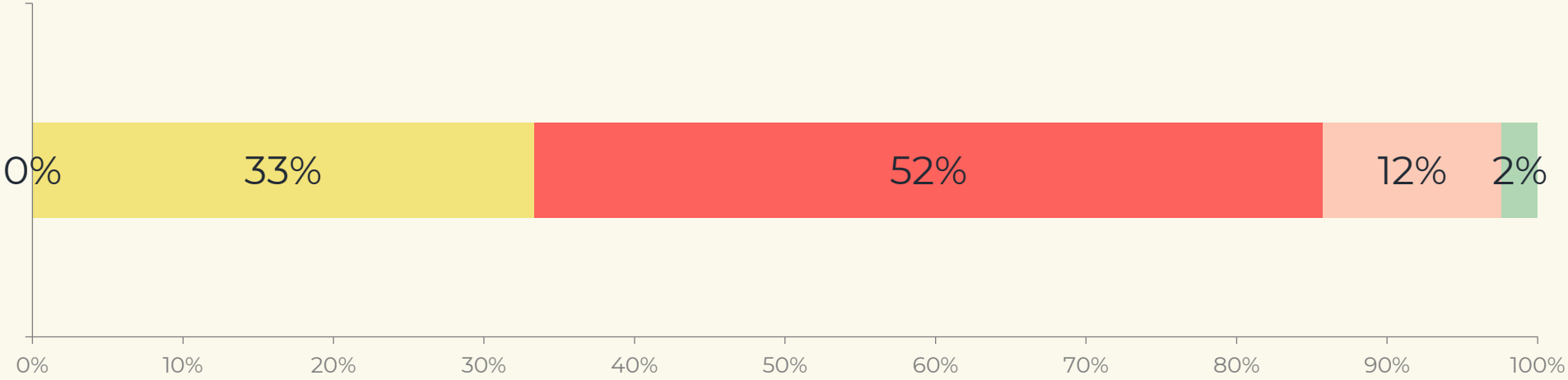


Audiences



Approximately what was the average % attendance for live performances (e.g. theatre, dance, circus) at your venue over the last year (as a percentage of your capacity)?

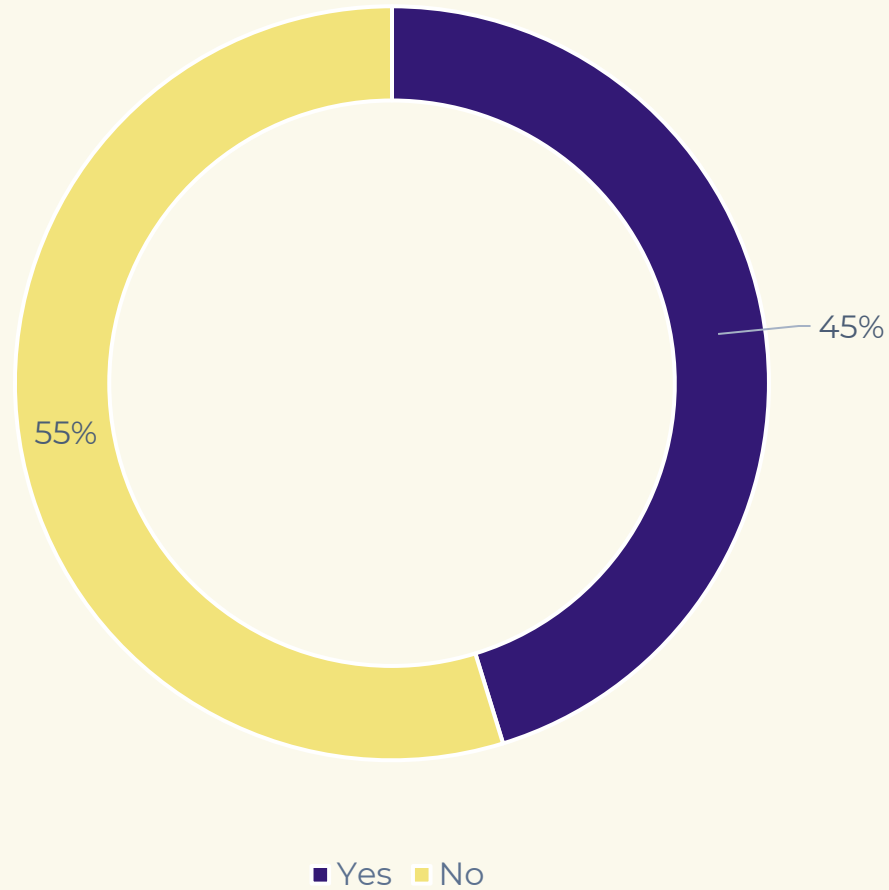
Answered: 42 Skipped: 3



■ Less than 25% ■ 25 - 50% ■ 51 - 75% ■ More than 75% ■ Not sure

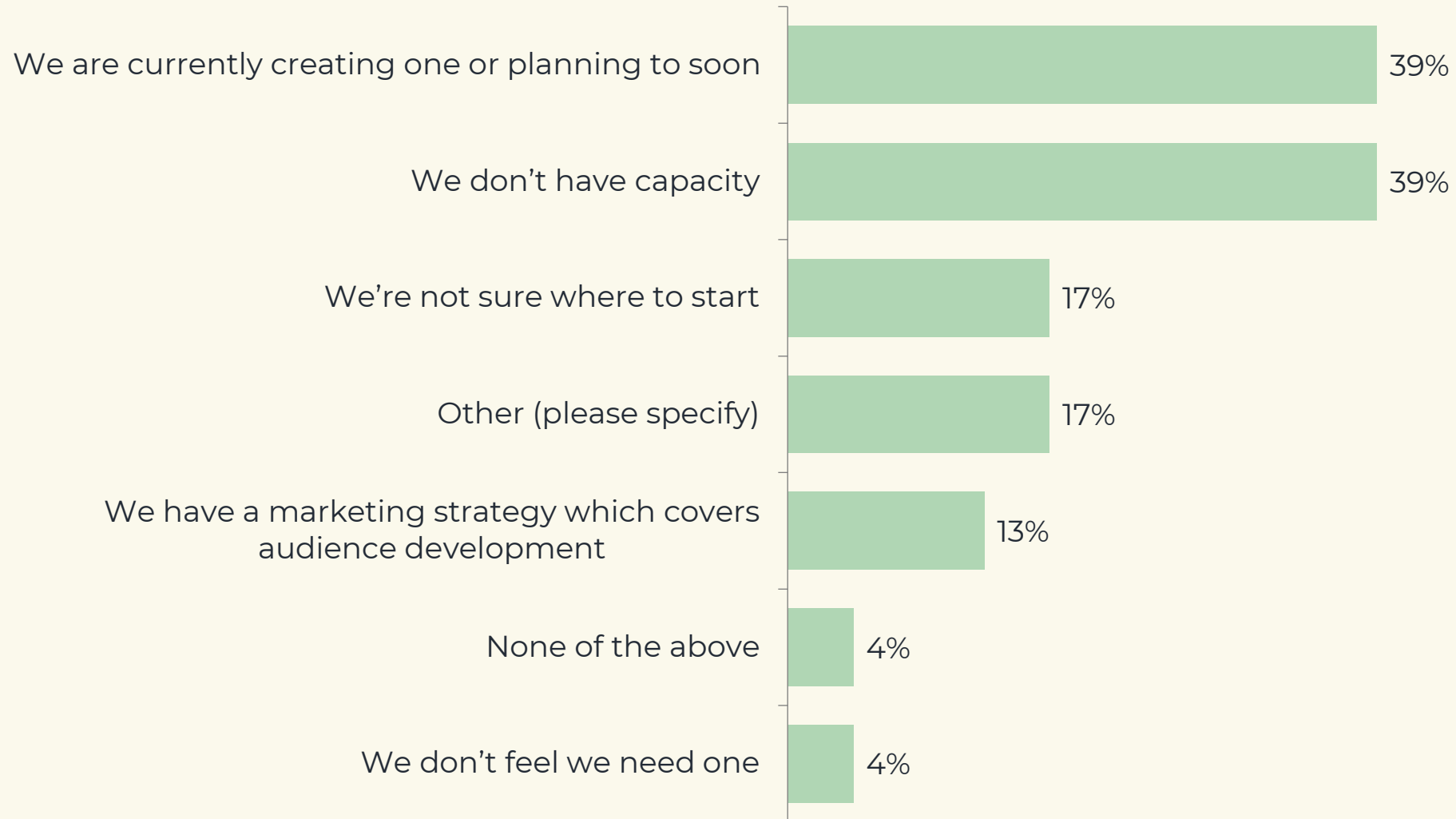
Does your organisation have an audience development plan?

Answered: 42 Skipped: 3



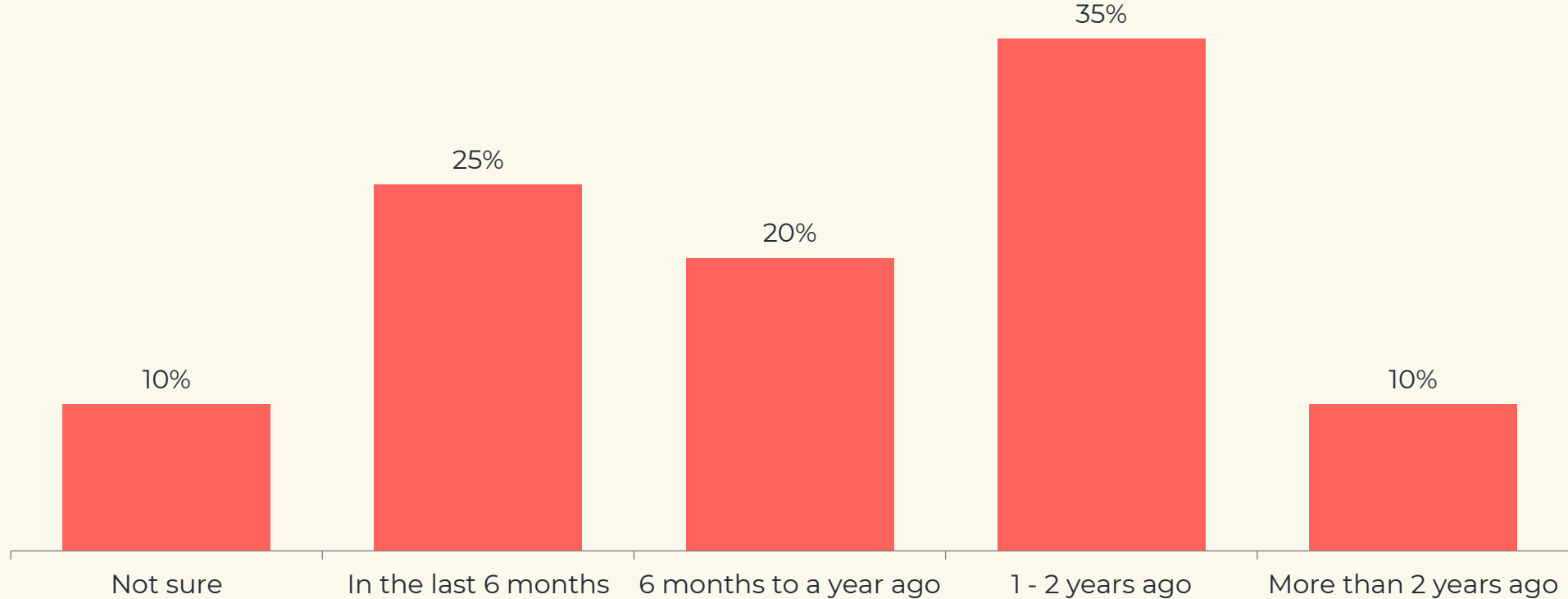
Why do you not have an audience development plan?

Answered: 23 Skipped: 22



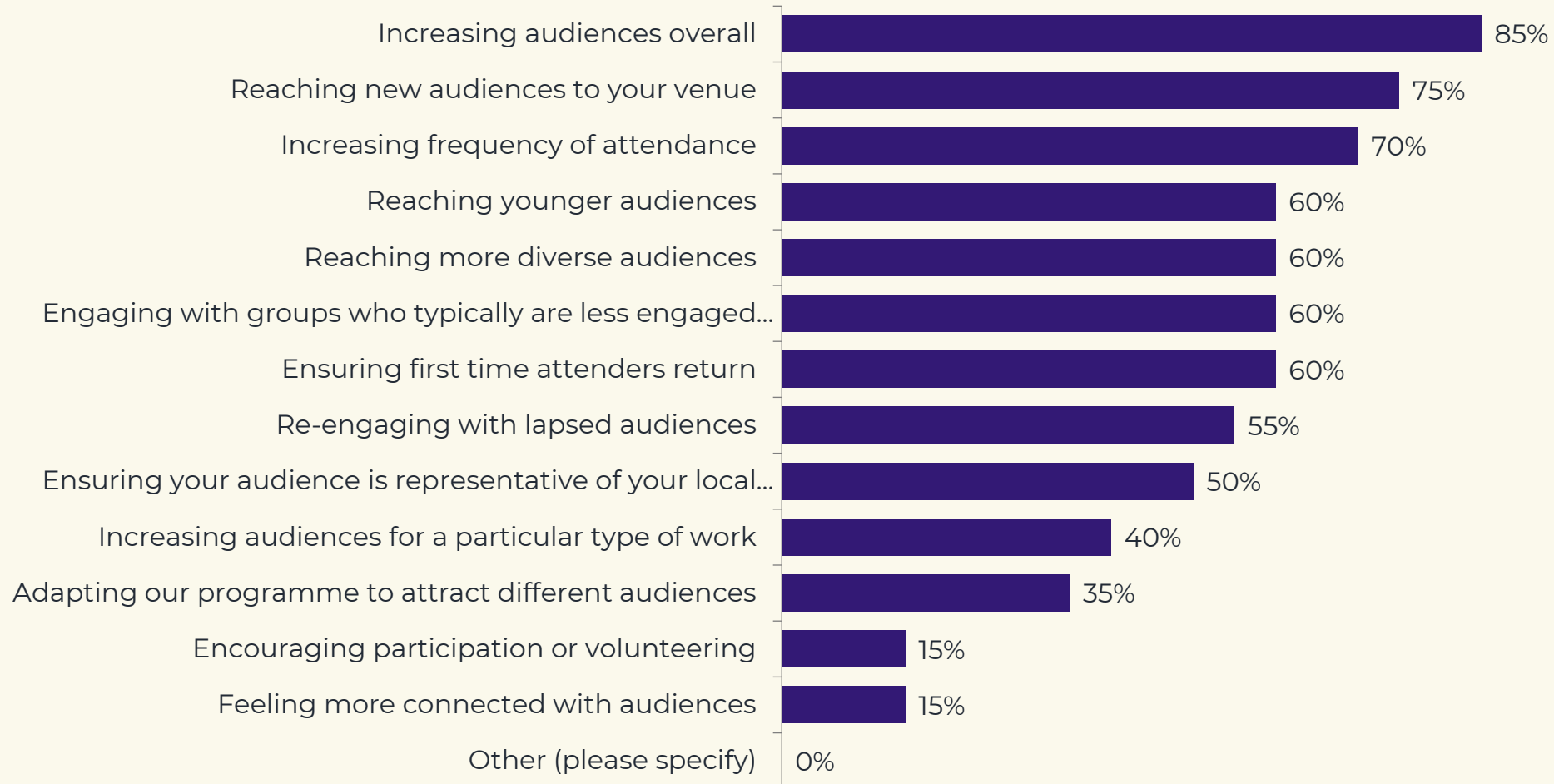
When was your audience development plan created or updated?

Answered: 20 Skipped: 25



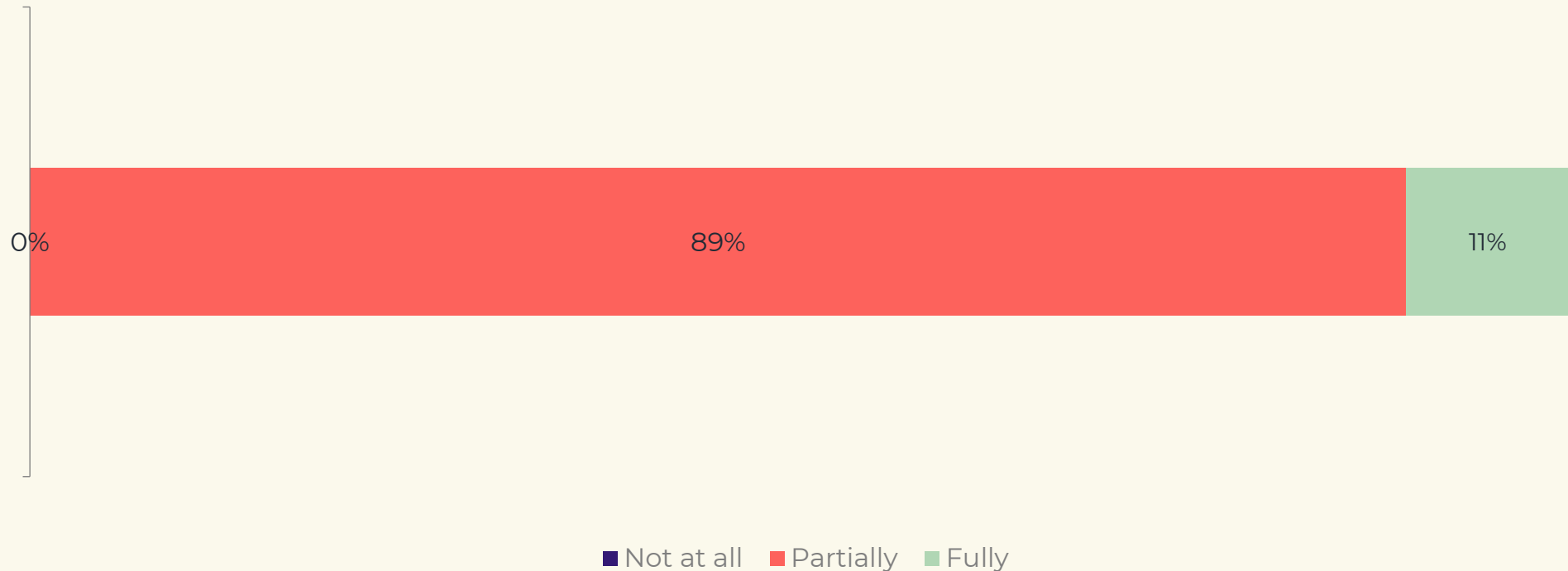
Which of the following, if any, does your audience development plan focus on?

Answered: 20 Skipped: 25



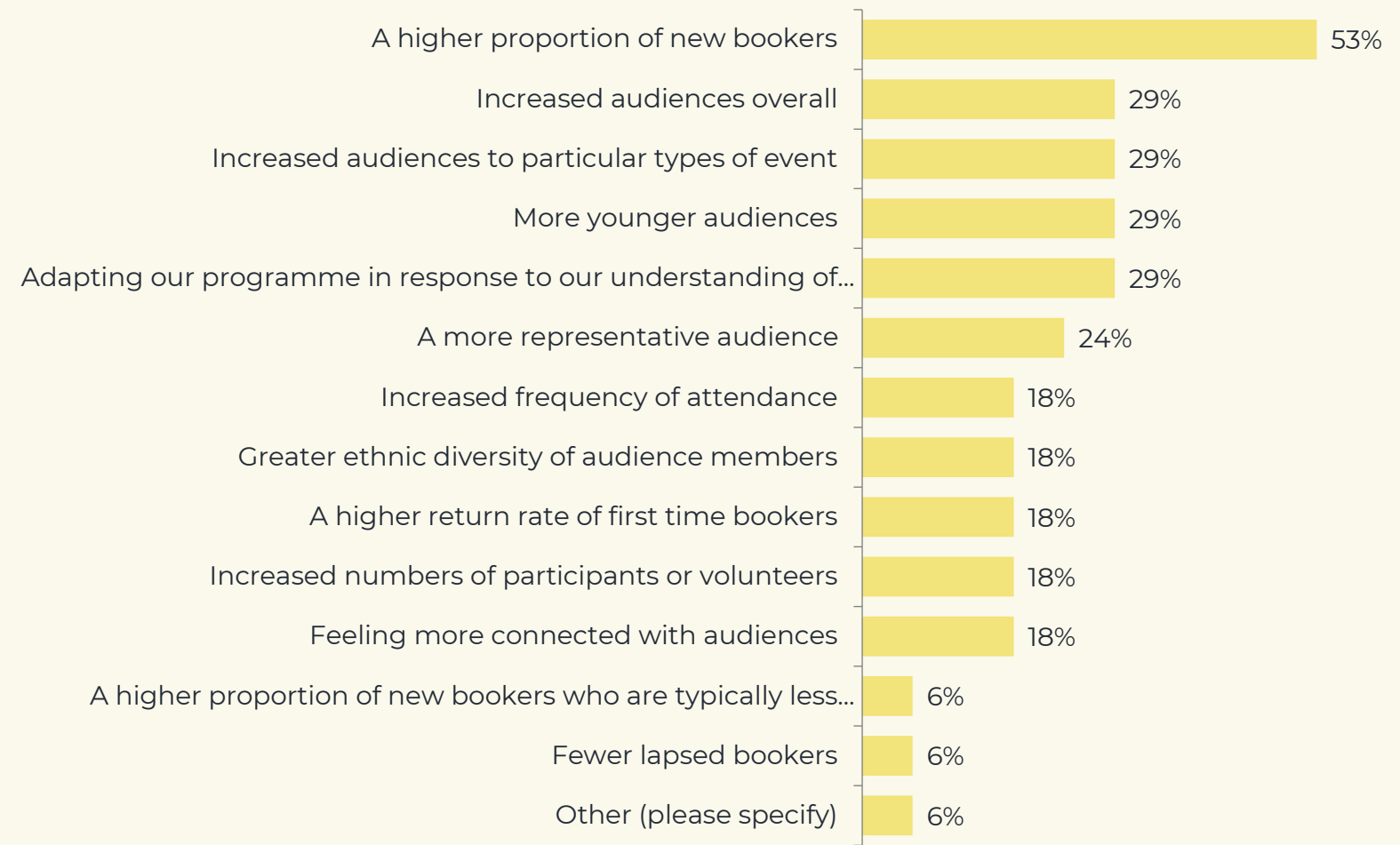
To what extent would you say you're actively implementing your audience development plan?

Answered: 19 Skipped: 26

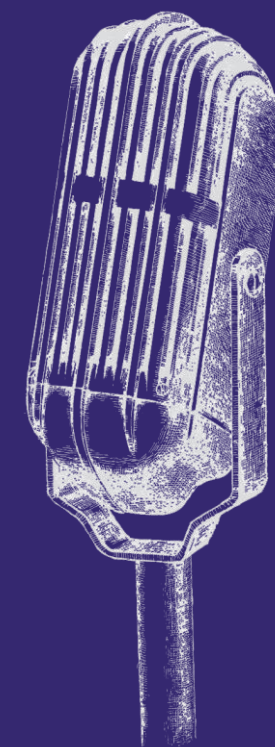


Have you seen any particular change or success as a result of your audience development activity?

Answered: 17 Skipped: 28



Support and development for artists and community arts groups



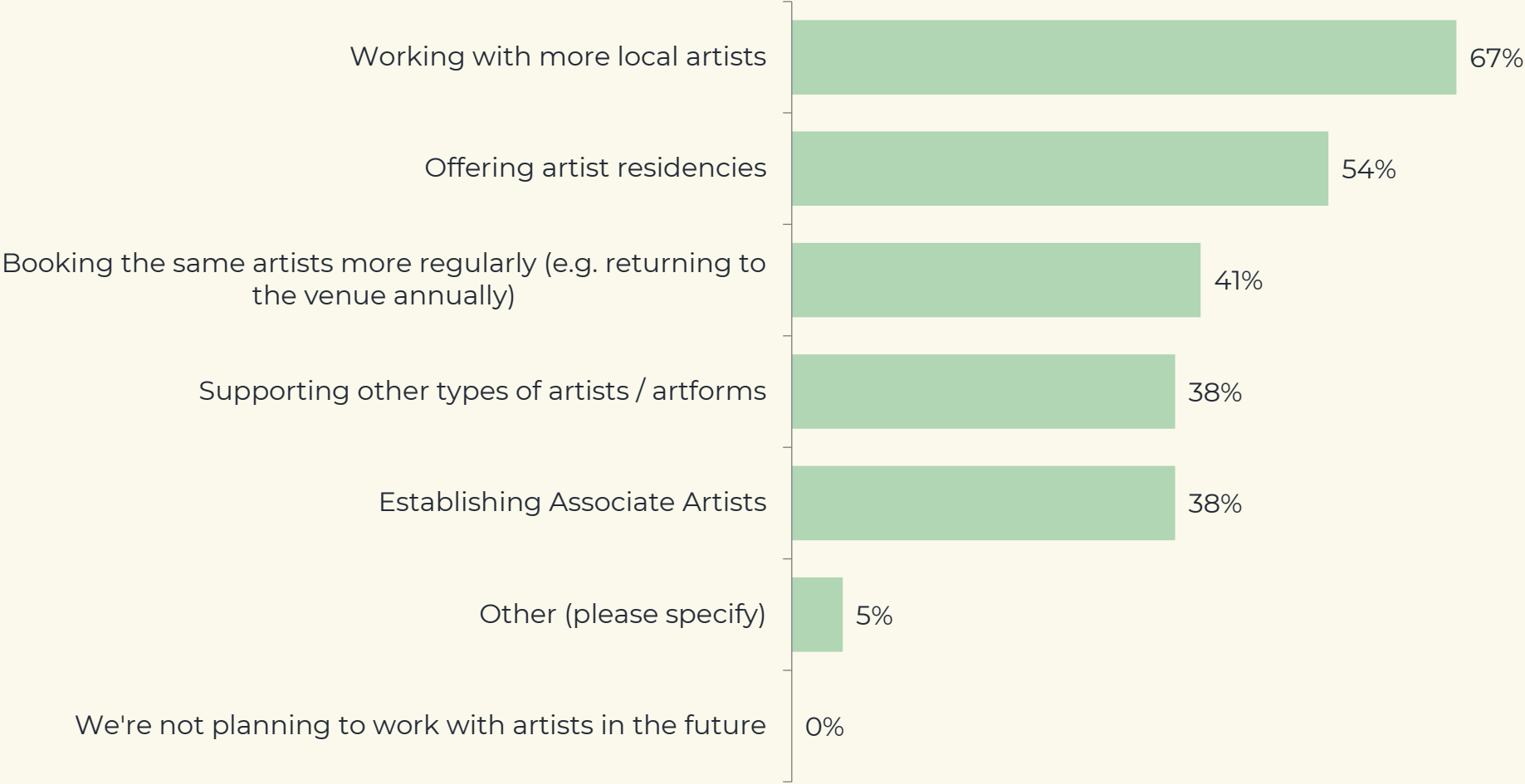
Do you currently work with artists or local community groups in any of the following ways?

Answered: 41 Skipped: 4



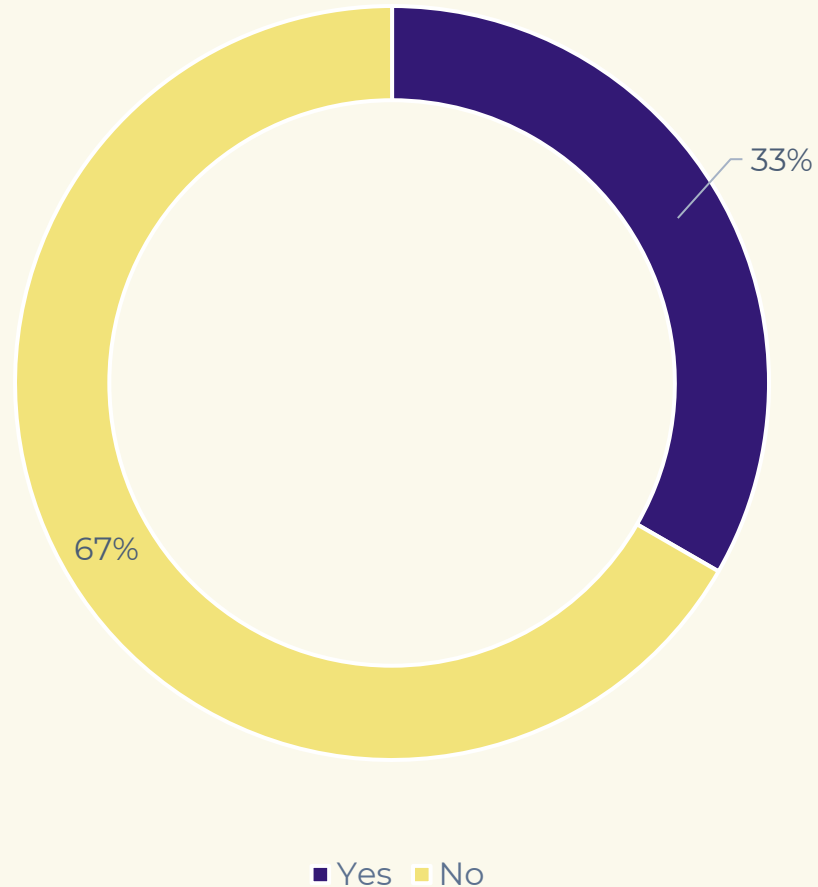
How are you hoping or planning to work with artists in the future?

Answered: 39 Skipped: 6



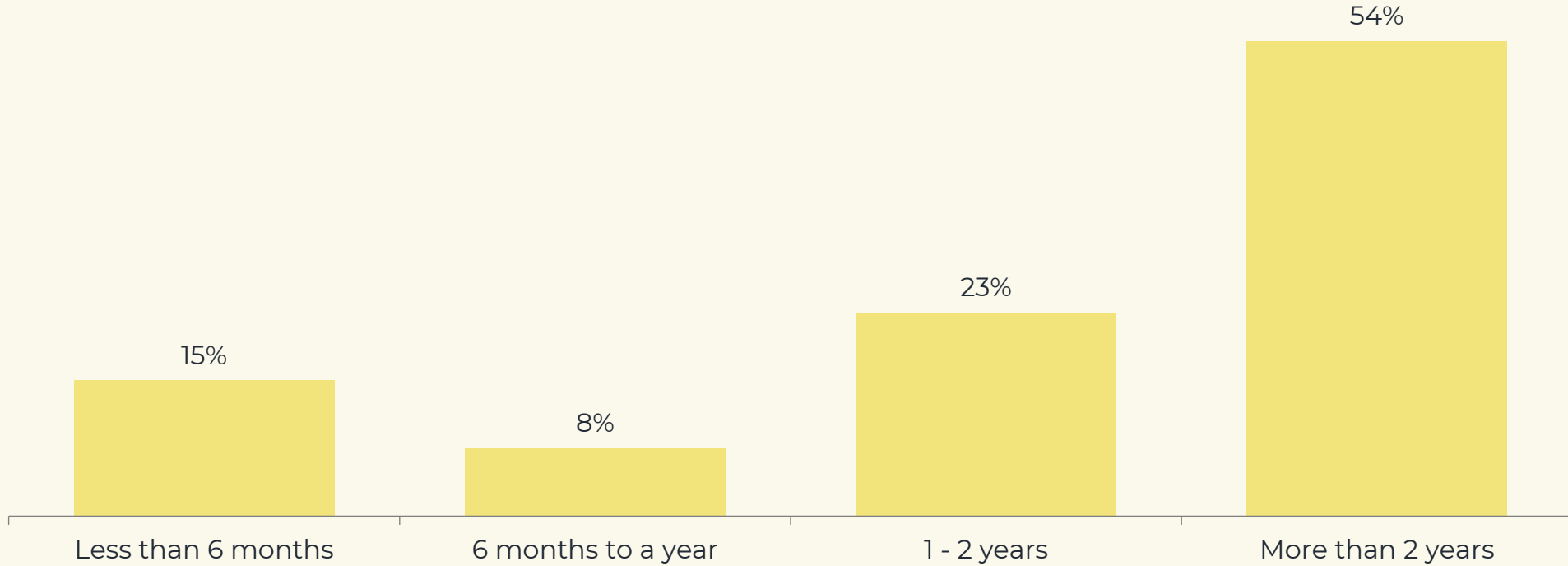
Does your organisation have an artist development scheme or strategy?

Answered: 42 Skipped: 3



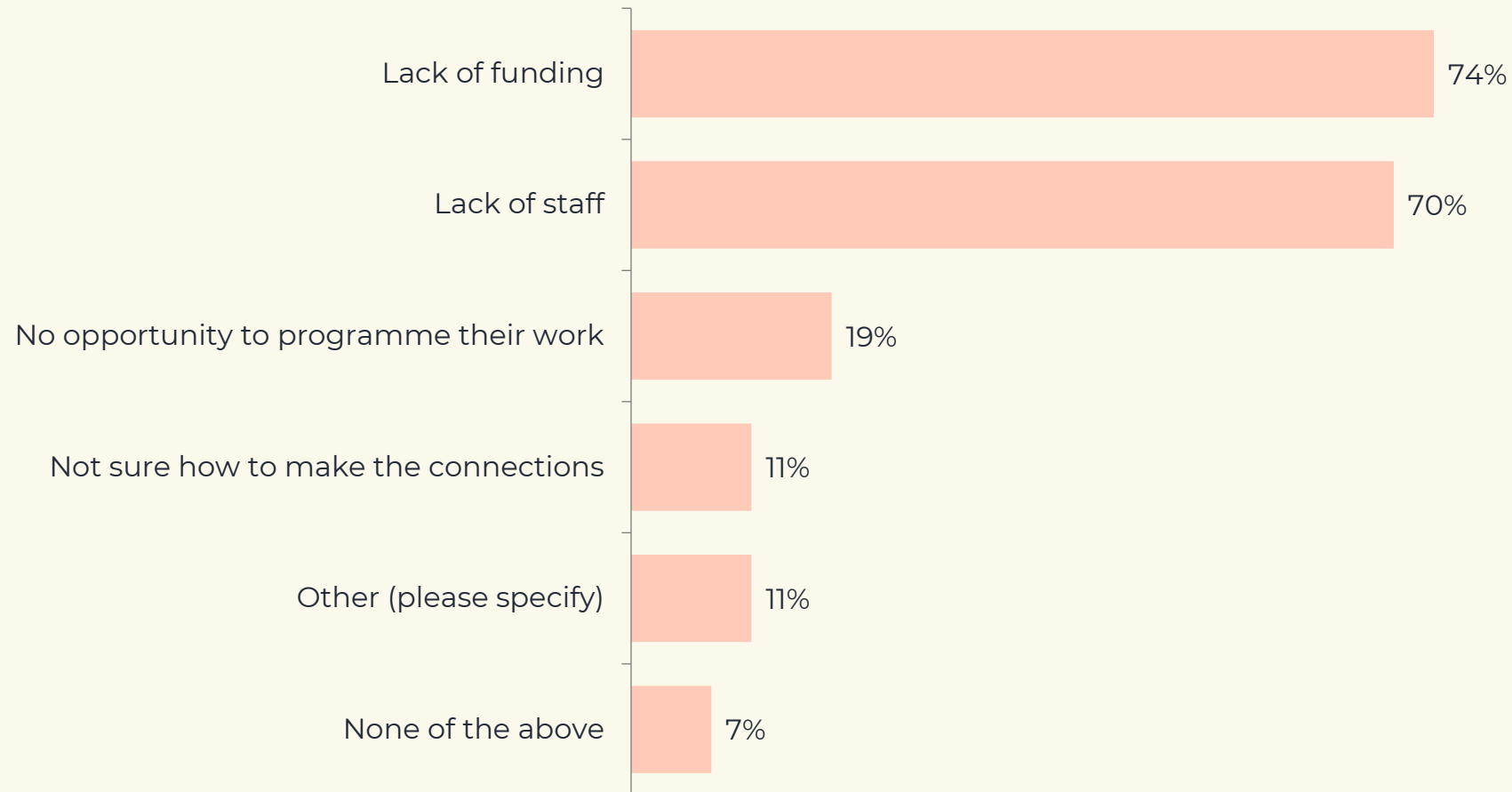
How long has your artist development scheme been running?

Answered: 13 Skipped: 32



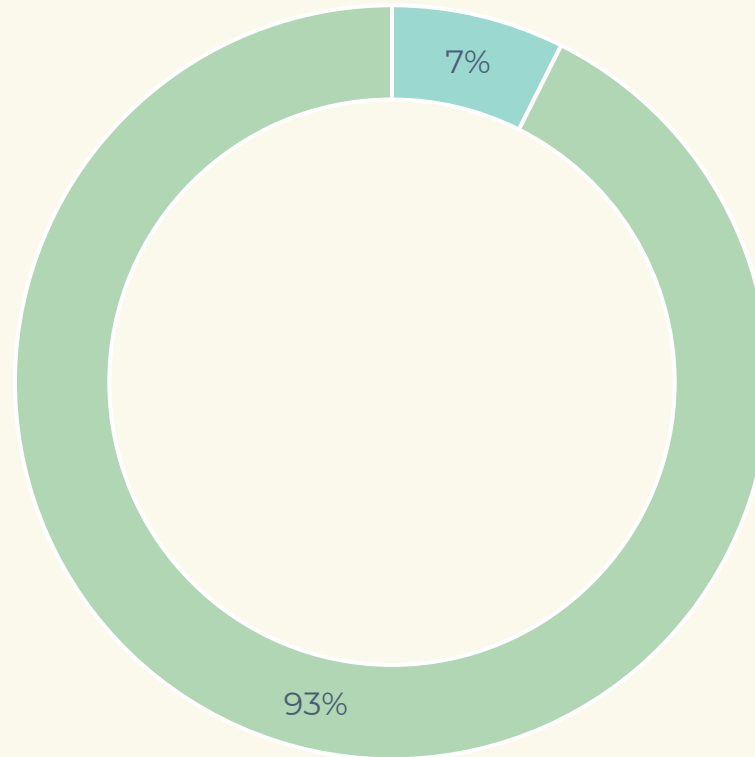
Are any of the following reasons why you do not have an artist development scheme?

Answered: 27 Skipped: 18



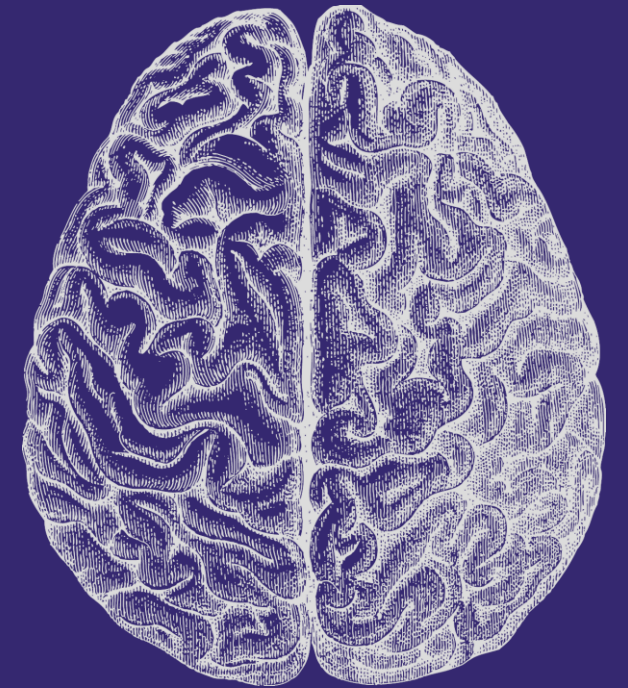
Have you previously had an artist development scheme?

Answered: 27 Skipped: 18



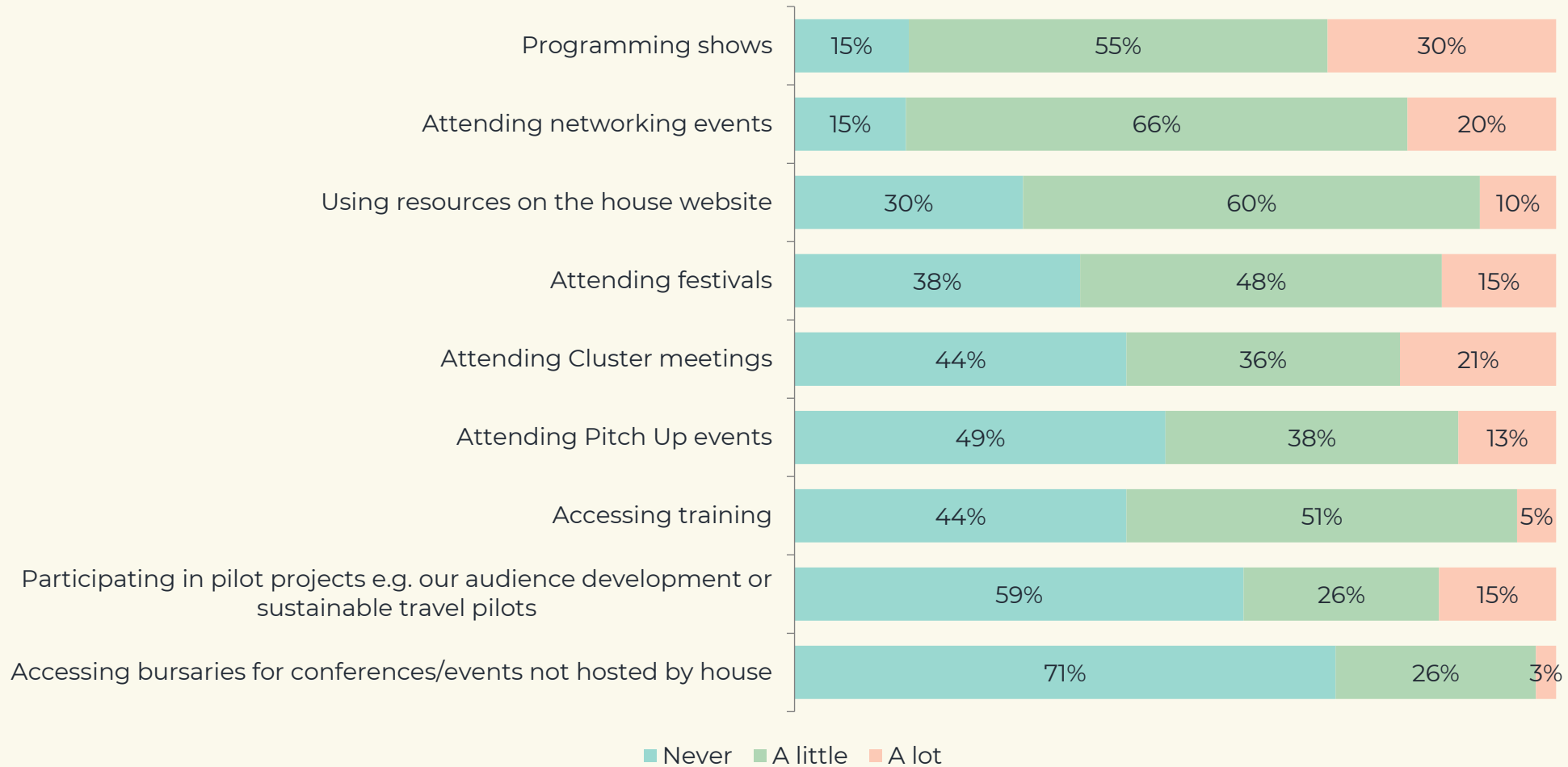
■ Yes ■ No

Engaging with house



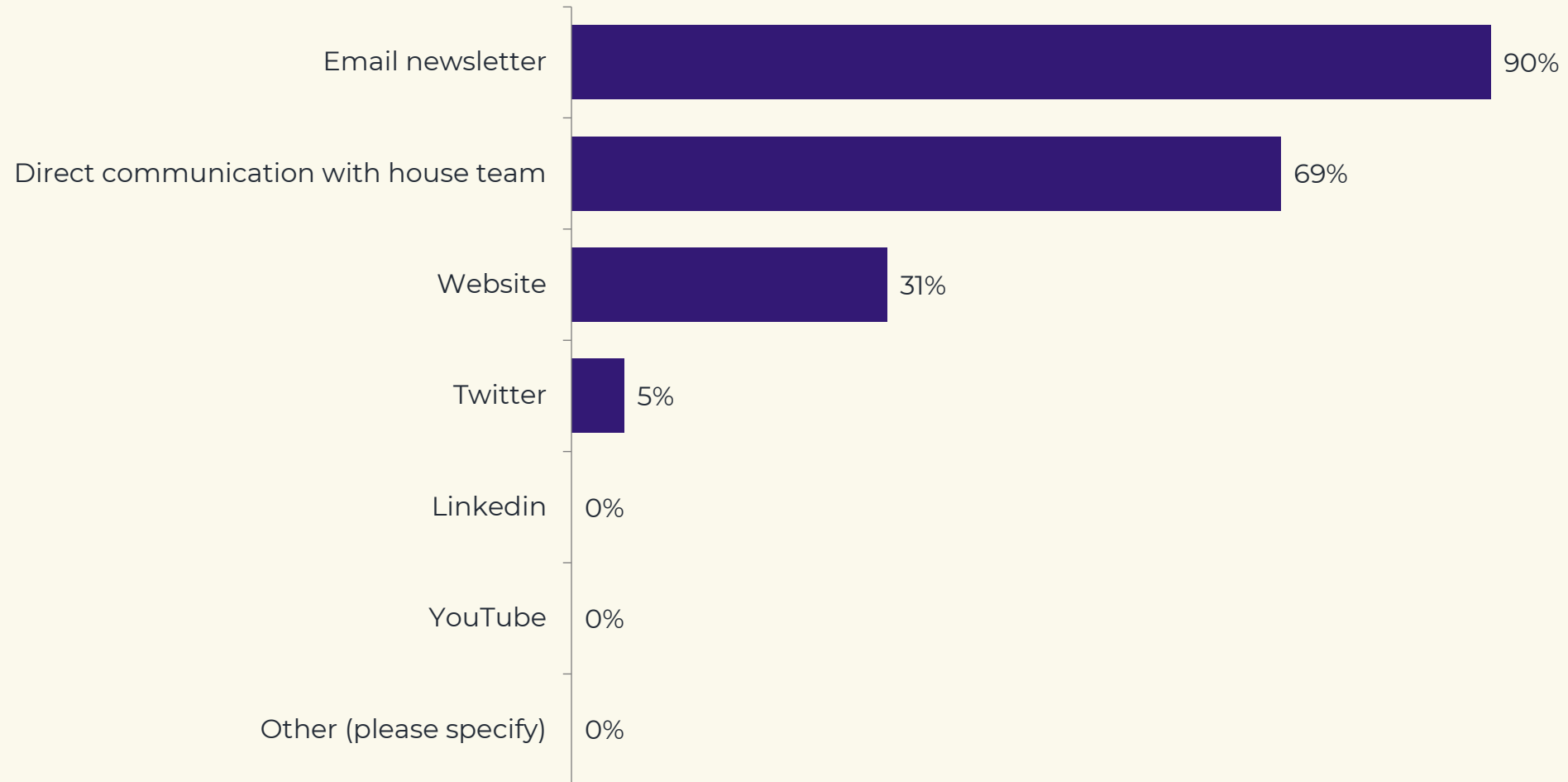
Does your organisation engage with house in any of the following ways?

Answered: 41 Skipped: 4



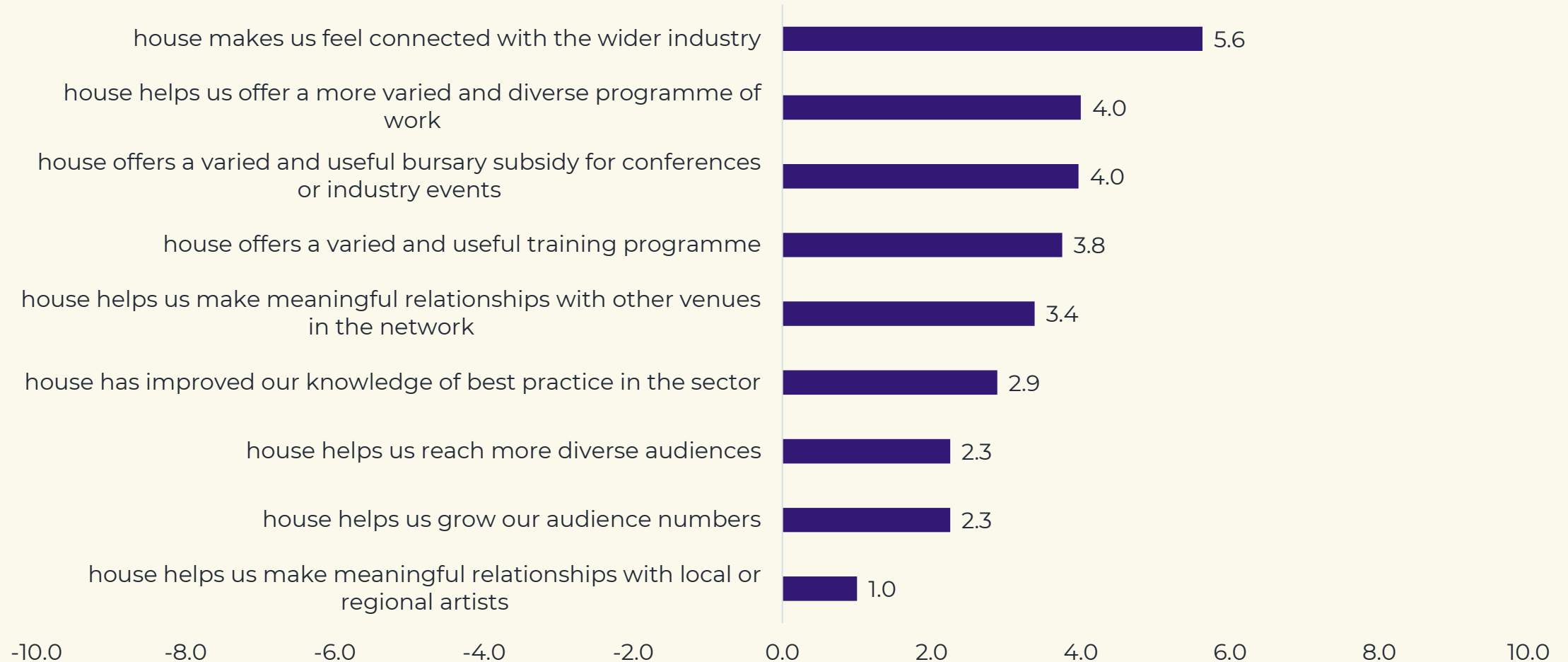
Which house channels do you use to find out about our activity?

Answered: 39 Skipped: 6



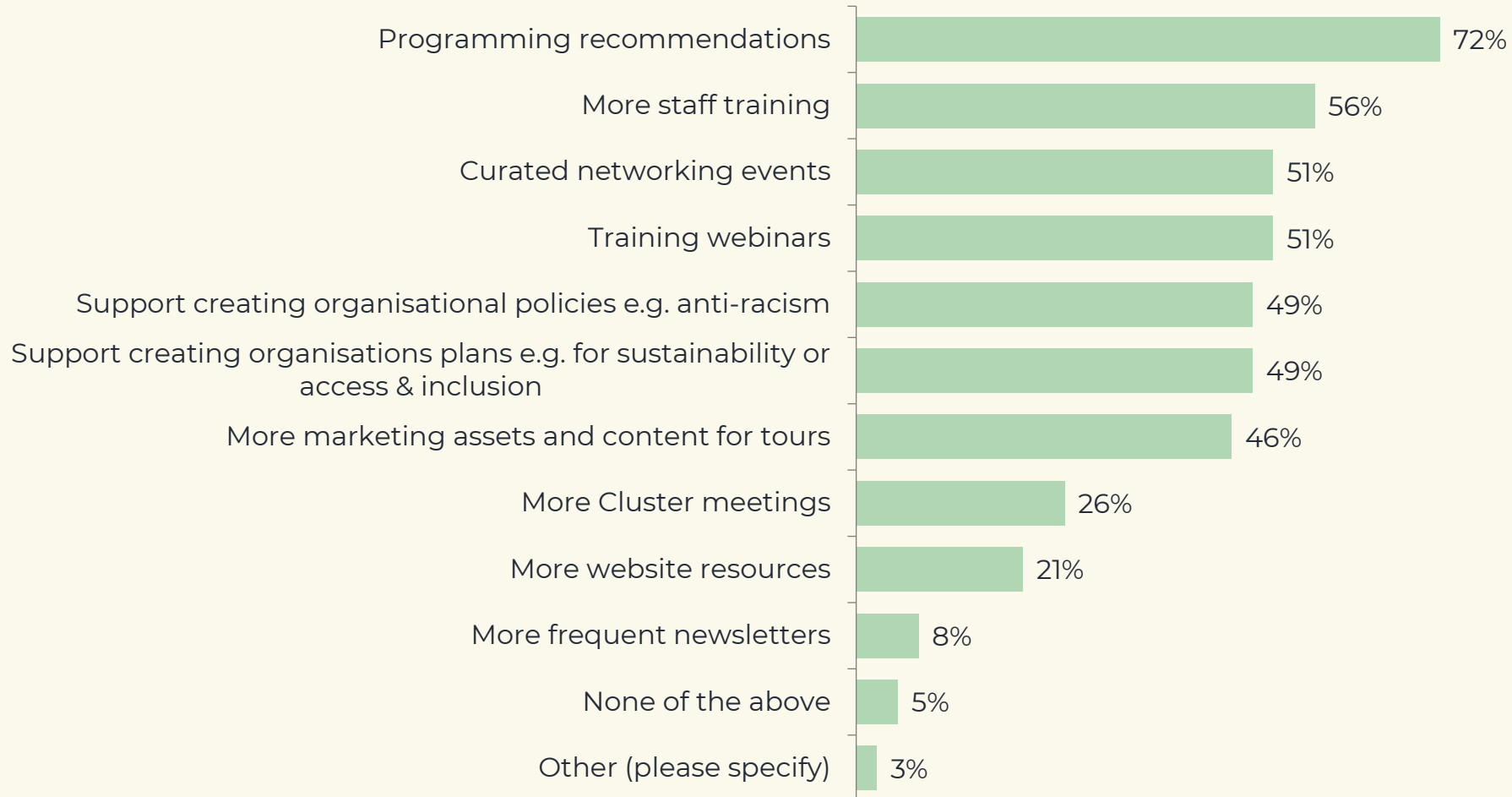
To what extent do you agree or disagree with the following statements?

Answered: 40 Skipped: 5

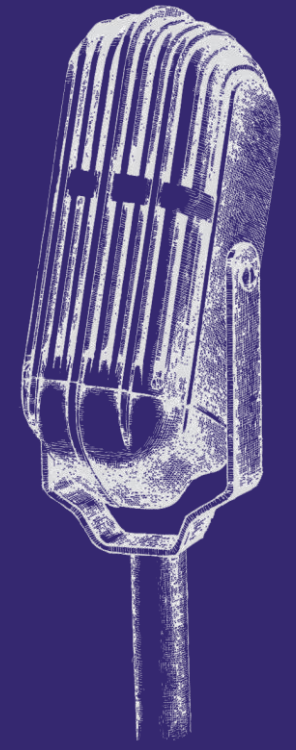


Would any of the following be useful to your organisation if provided by house in future?

Answered: 39 Skipped: 6

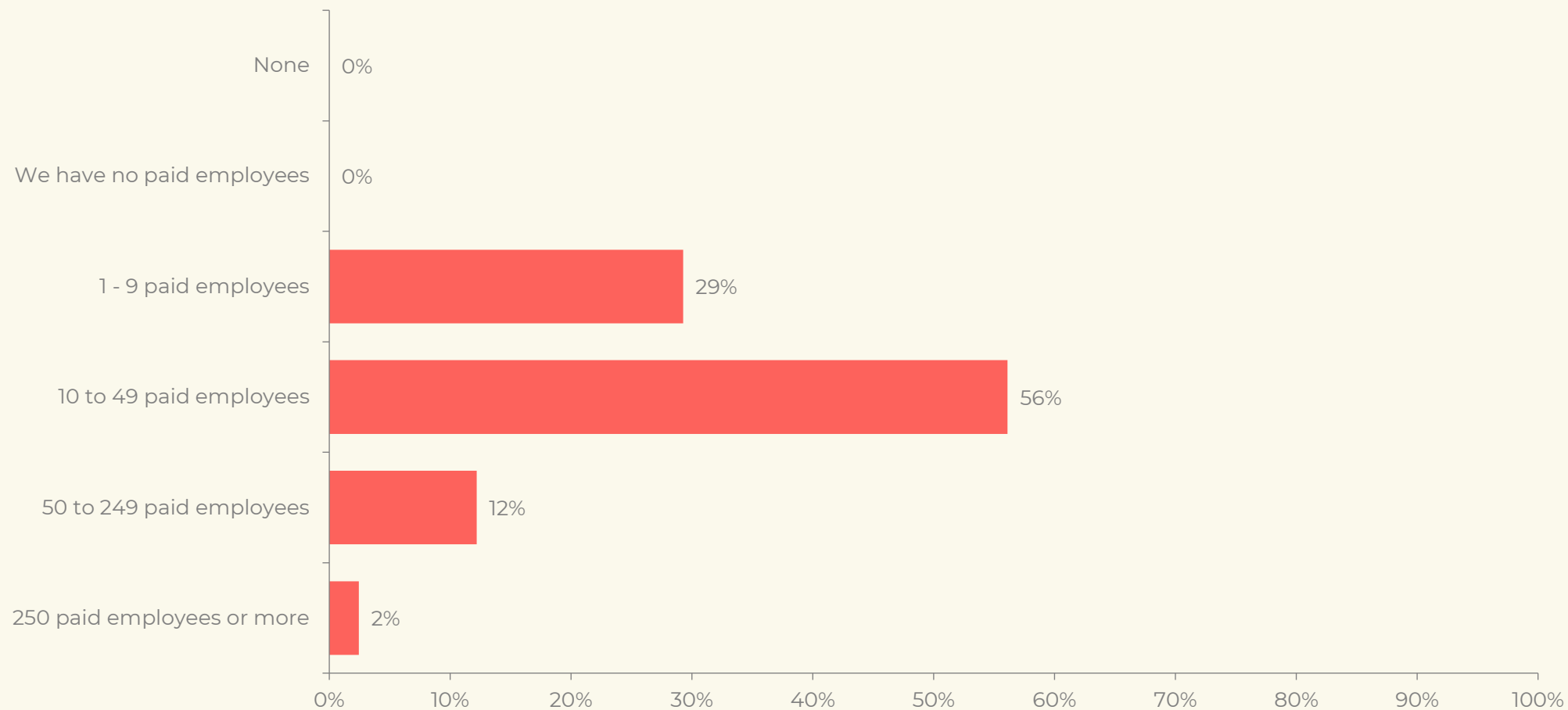


Your staff and training needs



How many paid employees work at your organisation (including fixed term and casual staff)?

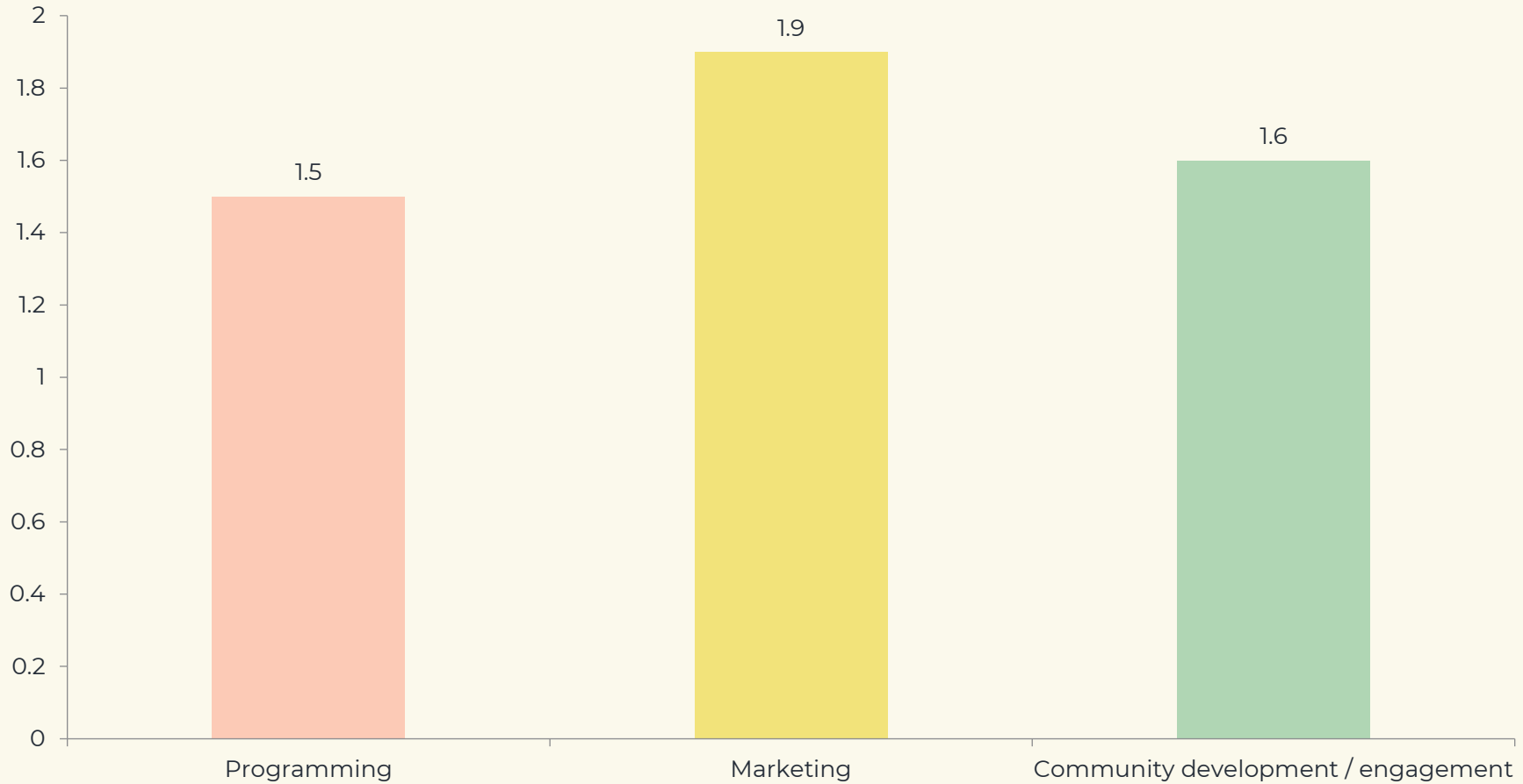
Answered: 41 Skipped: 4



How many staff do you have working in the following areas?

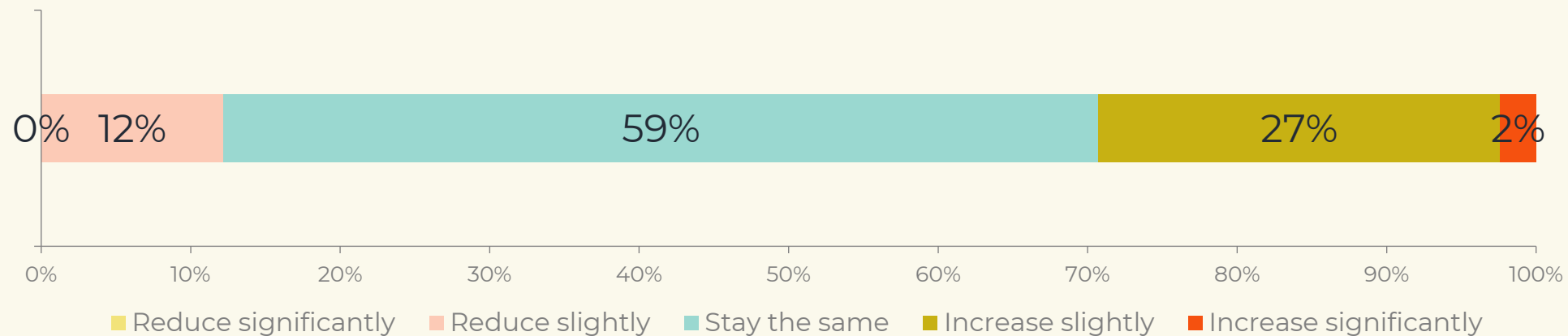
Answered: 41 Skipped: 4

*Average number



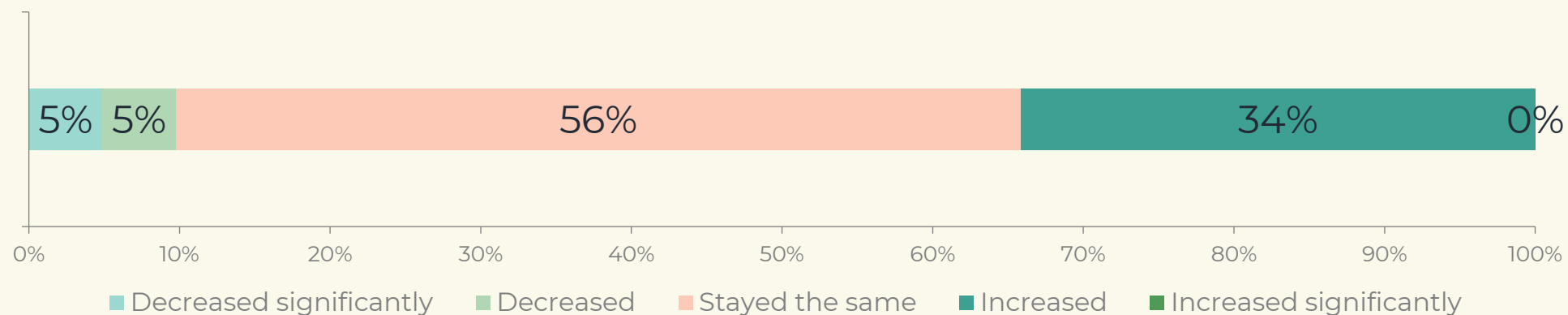
How do you think the size of your staff team will change over the next 6-12 months?

Answered: 41 Skipped: 4



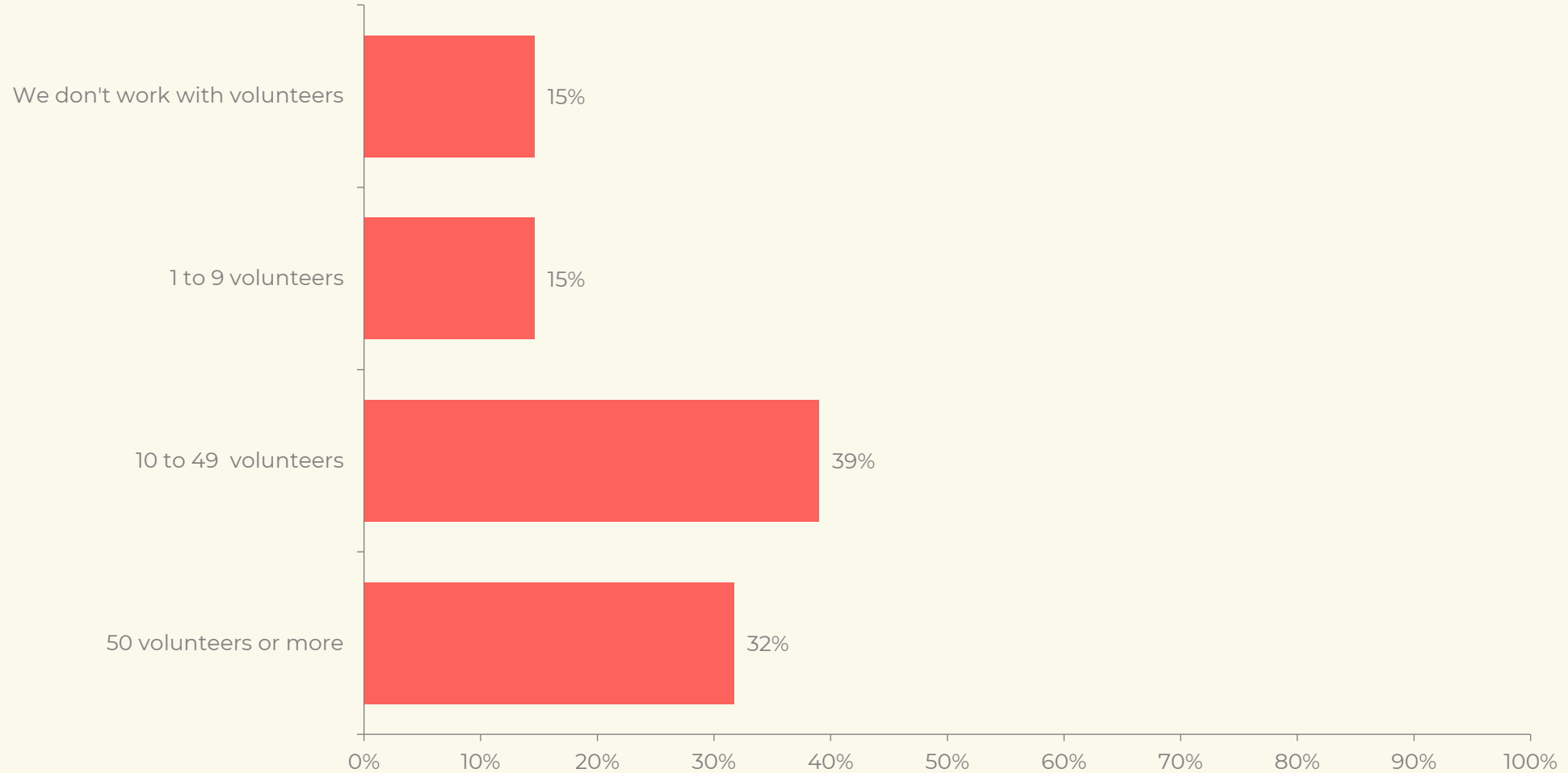
Do you think staff turnover has increased or decreased in the last few years?

Answered: 41 Skipped: 4



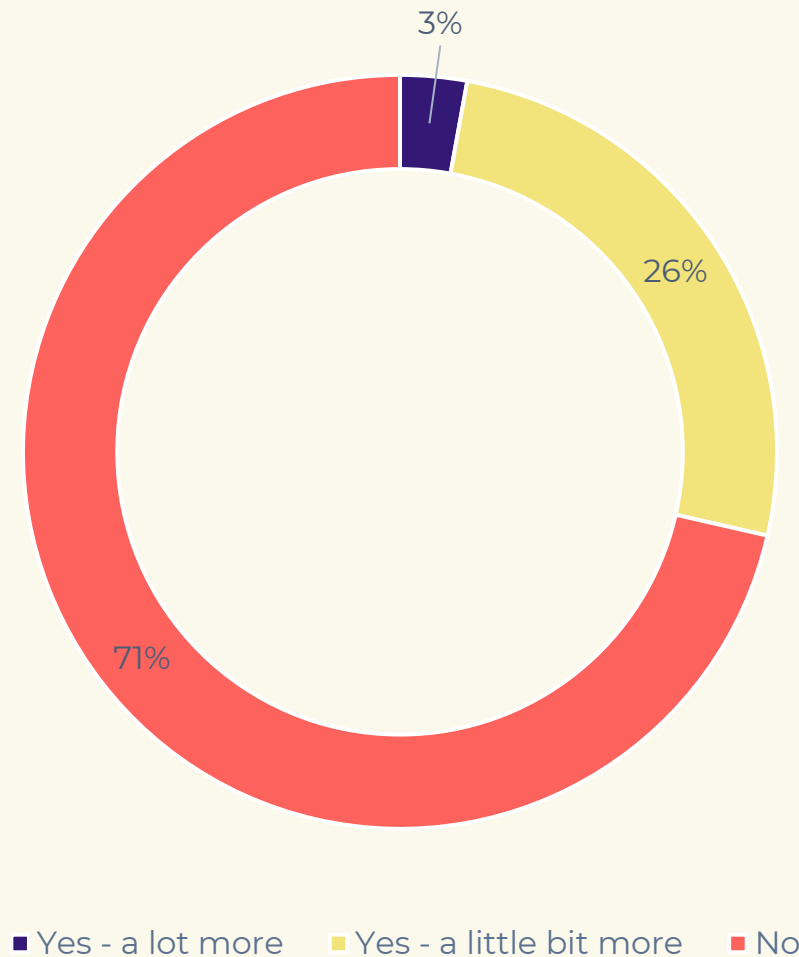
How many volunteers do you regularly work with at your organisation?

Answered: 41 Skipped: 4



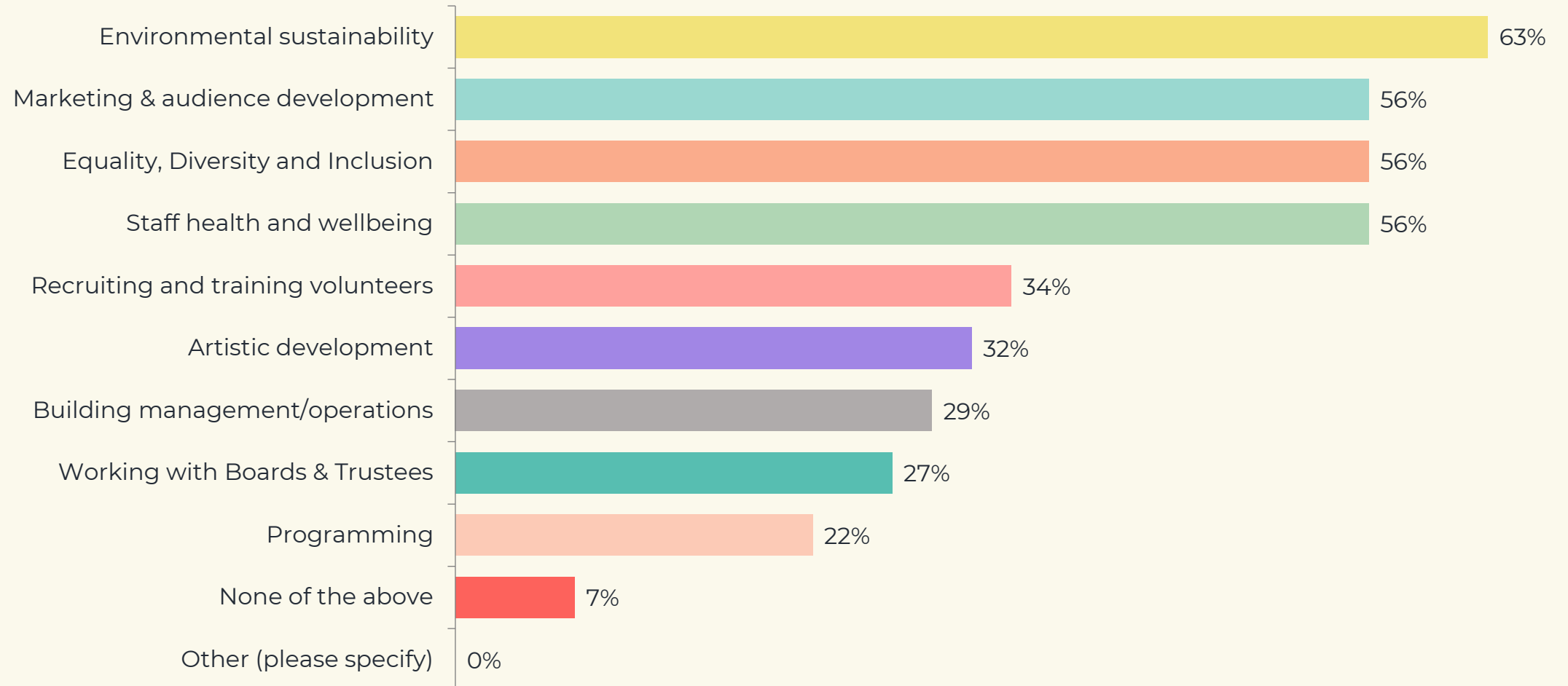
Is your organisation relying more on volunteers than you have in the past?

Answered: 35 Skipped: 10



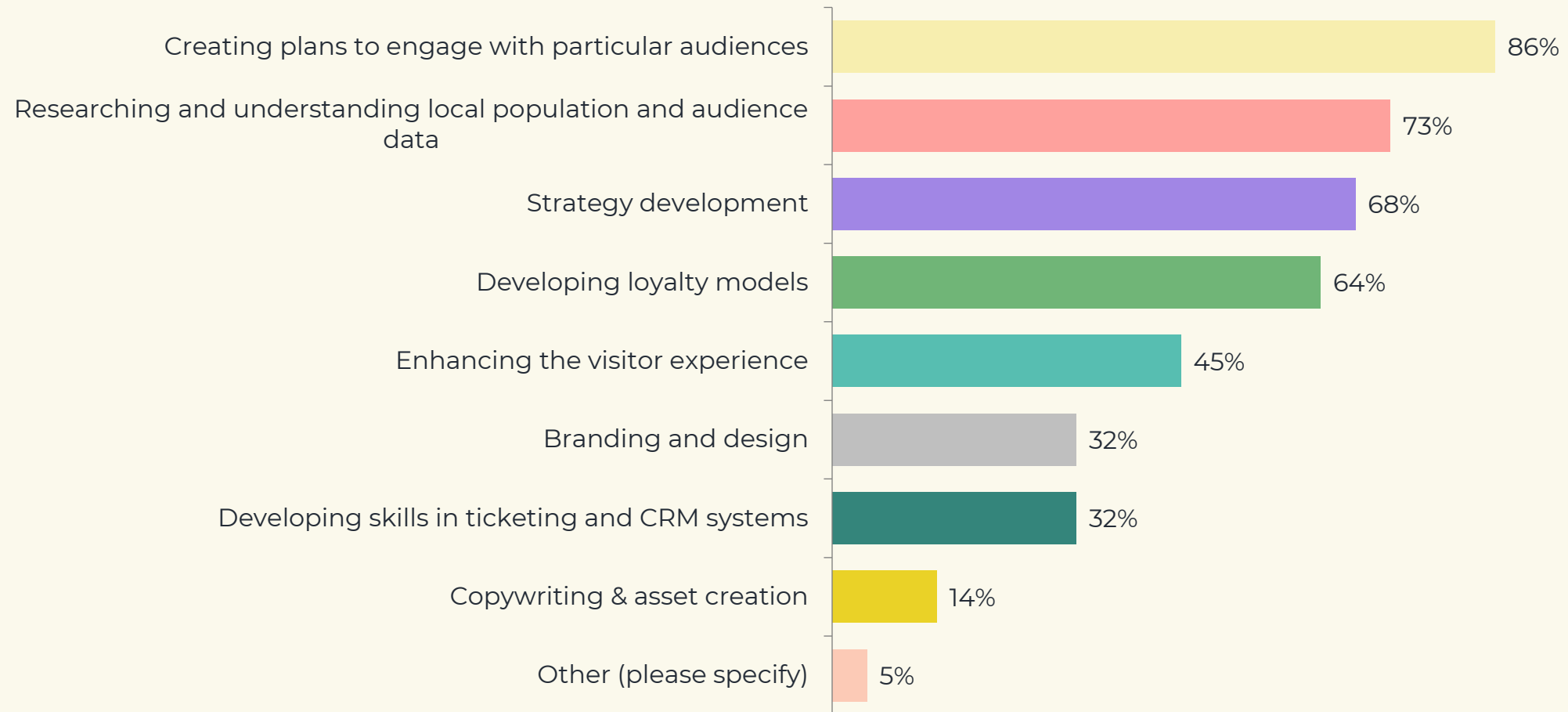
In which areas do you feel staff in your organisation need more training or professional development?

Answered: 41 Skipped: 4



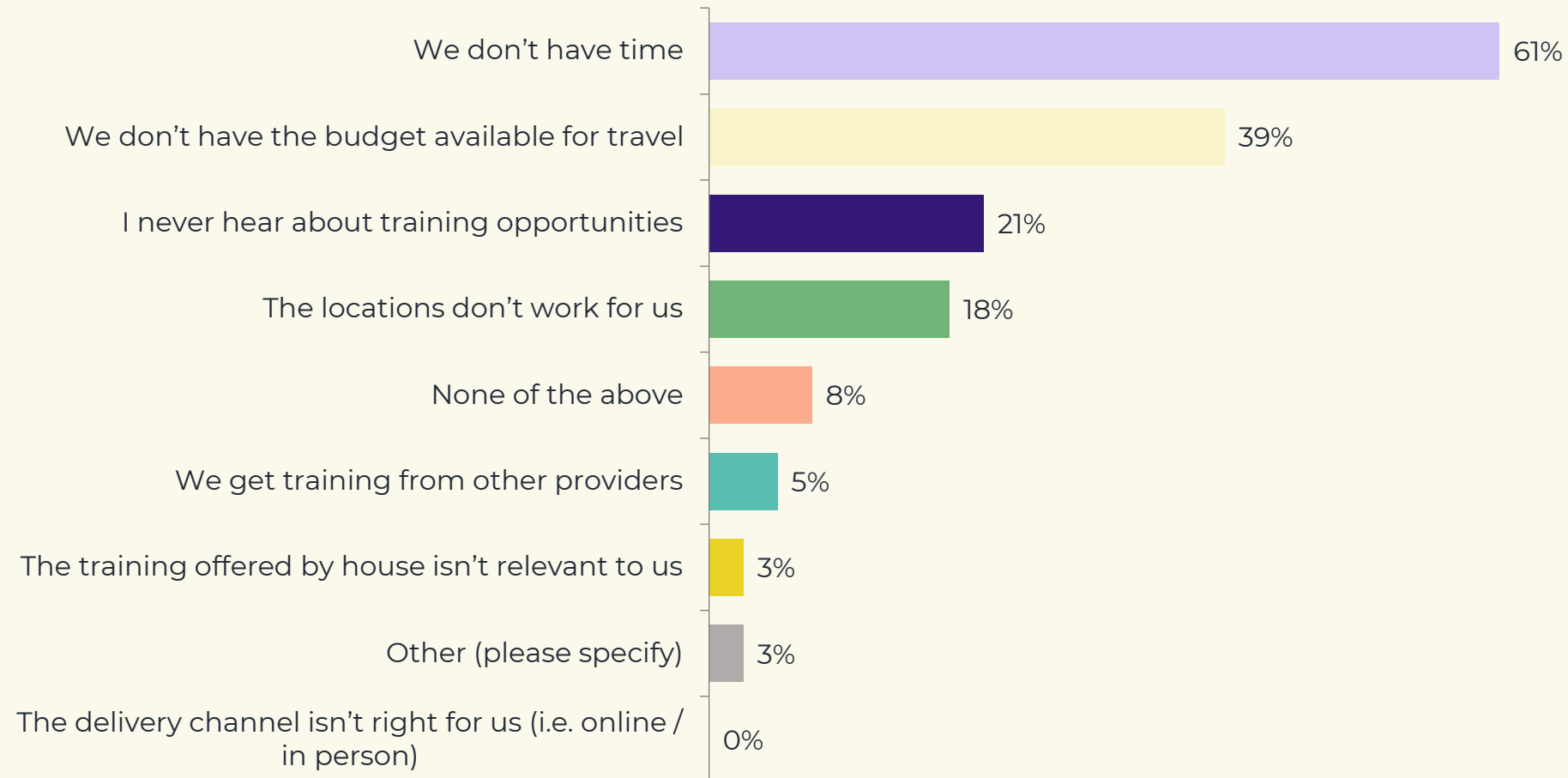
Are there particular areas of marketing and audience development your organisation would like more training in?

Answered: 22 Skipped: 23

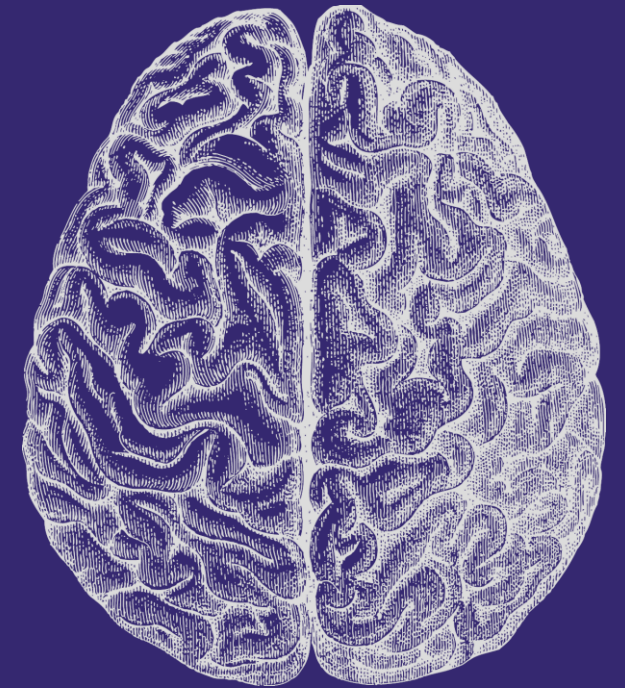


What (if anything) stops you from taking part in more of the training we offer?

Answered: 38 Skipped: 7

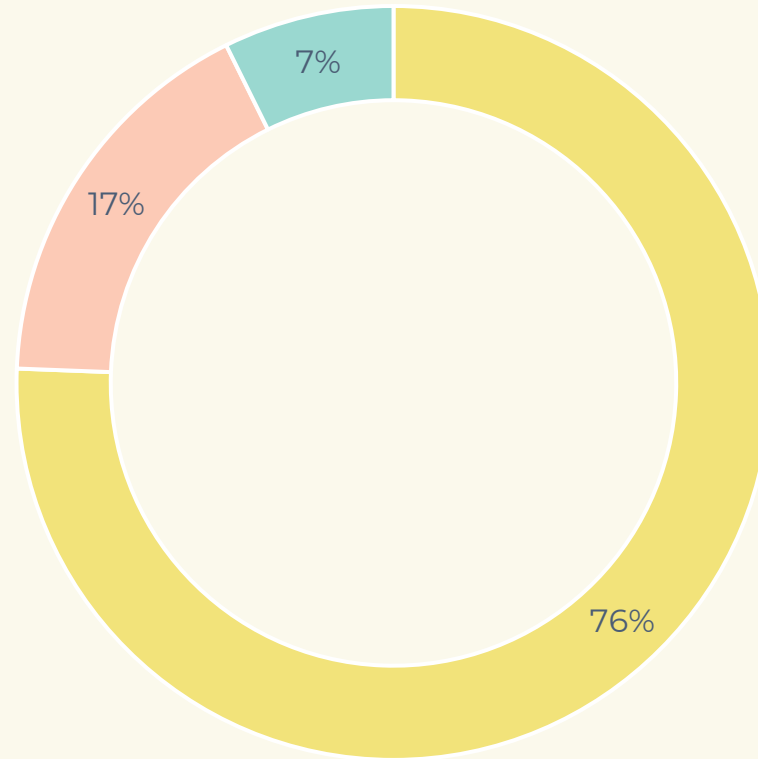


Your Plans and policies



Does your organisation currently have an Equality, Diversity and Inclusion plan or policy in place?

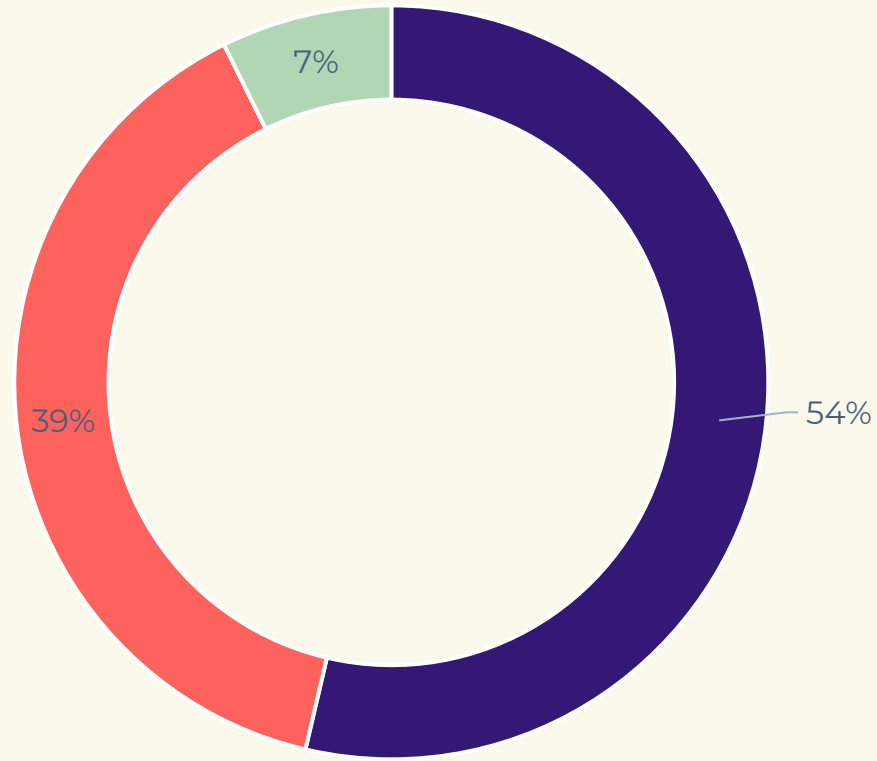
Answered: 41 Skipped: 4



■ Yes ■ No ■ Not sure

Does your organisation currently have an Environmental Sustainability plan or policy in place?

Answered: 41 Skipped: 4



■ Yes ■ No ■ Not sure