house network:
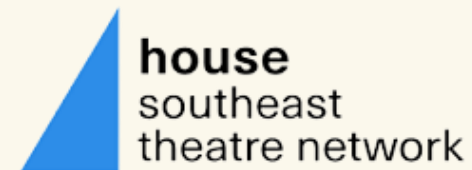# Members Survey 2024

Results and analysis
June 2024

Anastasia Starikova – Research & Data Executive

Flo Carr – Associate Director

house
southeast
theatre network

in association with
indigo

About Indigo

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.

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

Report prepared by:

Anastasia Starikova
Research and Data Executive

Flo Carr
Associate Director

Research overview

- Indigo has run the house member survey for the last four years.

- This year's survey ran from **15 May to 7 June 2024**

- It was sent to **145** house network contacts

- **72** responses received (67 complete, 5 partial)

- **50%** of contacts responded

Question areas

- About the organisation

- Programming

- Audiences

- Engaging with house network

- Staff and training needs

- Plans and policies

KEY FINDINGS, NEEDS AND OPPORTUNITIES

Programming

- Organisations are sourcing their programme mostly through **recommendations from industry colleagues** (**89%**), **seeing live performances** (**85%**) and **re-programming theatre companies** (**83%**).

- When asked which artforms they do not currently programme and why not, the barriers cited were **not having an audience for it** (**39%**) and **not having enough funding** (**34%**).

- Most organisations produce or programme **theatre** (**94%**), **family work** (**93%**), **music** (**92%**) **and comedy** (**89%**).

- **74%** of organisations programme **relaxed performances** and **64**% programme **BSL interpreted performances.**

*As we're outdoors **we have to be seasonal**. This also means we're **unable to programme touring companies** who rely heavily on tech etc. Additionally its **hard to get** our **audience** to **turn out for original work**.*

*We do **rely a lot on "submissions"** or **"pitches"** from artists, agents, promoters, theatre companies etc, so it **depends what is being offered** and when.*

*We do not receive funding which would enable us to **take significant financial risk** on guarantees.*

Audiences

- The majority of organisations (**69%**) say that their **average capacity** for performing arts is at **51-75%**.

- **53% of organisations** said they had an **audience development plan**, which focus mostly on **growing the audience overall** and **reaching new audiences**.

- Of those who are implementing their audience development plans, significant numbers have seen a higher proportion of **new bookers** (**49%**), an increase in audiences **to particular activities** (**40%**) and an **increase in audiences overall** (**34%**).

*We want to **nurture our existing audience** and **gently challenge them** but also programme work which **attracts younger and diverse audiences***

*We have managed **to retain a loyal audience**. We see **stronger sales** for **comedy and music** and **theatre and dance continue to be more tougher sells**. Our audiences still lean towards "**a good night out**" so more challenging subject matters are less appealing. **Booking patterns continue** to be **later**, particularly for **family work** at the moment. They are happy to spend more **money** and **book** much further in advance for **big name comedians.***

Engaging with house

- The majority of organisations (**82%**) mainly engage with house through **direct communication with the house team**. They also engage through the email newsletter (**76%**).

- Organisations see the main benefit of the membership is that house **connects them with the wider industry** (**79%**), which stayed the same as last year. Significant numbers also value the way house **helps make meaningful relationships with other venues in the network** (**77%**) and **helps offer a more varied and diverse programme of work** (**74%**).

> house is the most **successful network** of which we're part, having the **most tangible and effective impact** on **our programmes**. All power to you

> House is **a fantastic organisation** - it raises our game in **artistic programming** and helps us **stay connected** with other **venues in the region**. We'd be so **much poorer culturally and operationally** without it. Thank you everyone at House for being there for us x

Engaging with house (comments)

What are organisations looking for from the house team?

networking events can assist in providing a better *overview of the strategies* of similar venues *programming recommendations* could help to broaden work engaged without putting undue stress onto the house network staff

Advice on sustainability, particularly how best to *benchmark and track carbon reduction* (when you don't have the budget for an expensive consultant!), *best practice for access and inclusion* policies, *training for marketing* teams on *audience development*

Just *keeping us informed as you always do* and we will engage when time and money allow! Our little team have all been finding their feet in new roles this year.

Support to *create an Environmental Policy* and *Action Plan*, working with other *similar organisations*
Training is always very welcome/needed

Staff and training needs

- **72%** of organisations have **more than 10 volunteers** working with them.

- Overall, there is a feeling that **staff turnover has increased** in the last year: **47%** of organisations **think that staff turnover has increased. 41%** say it **stayed the same** and only **11%** which say it has **decreased**.

- When asked about their particular training needs, respondents said they particularly need training in **marketing and audience development** (**69%**) and **EDI** (**59%**).

*We see people **moving out of the arts**, often **seeking higher wages** or wanting **different working patterns**. We had high turnover in the **marketing team** post pandemic for various reasons but this has settled down. We now attract a lot of applicants if we do advertise these roles. It is not a significant problem at the moment but we see **higher turnover** in **areas like Front of House**.*

*After a few years of **high turnover** there's a large **focus on retaining staff** but we also know we have a **large number of entry level roles**.*

Plans and Policies

- **97%** of organisations **have EDI policy in place**, which is **much higher** than in previous years: **75%** in 2023, **76%** in 2022 and **79%** in 2021.

- **75**% of organisations say they are currently implementing their **Environmental Sustainability Policy**, which **is higher** than in the previous years: **51%** in 2023, **60%** in 2022.

- Organisations responded that the main resource for accessing information on sustainability policies is **Julie's Bicycle toolkit**, which **79**% or organisations have used.

- Most organisations (**92%**) are focusing on **managing their venues more sustainably** and the largest barrier in this area **is lack of staff capacity** (**80%**).

Focused interviews - methodology

- **Focused interviews** were held after the close of the survey with two member organisations.

- The aim of the interviews was to understand more about the **relationship between house** and **member organisations** including the **types of engagement** they have, **most valued benefits** the membership with house brings them and **things that could be improved** or **developed in the future**.

- Questions asked were divided into three sections: **Programming, Audience Development** and **Staff turnover and skills**.

- Within each section the interviewees were asked about **challenges they are experiencing** in this particular area in their organisations, **how house have been supporting them** in this area and **whether there is anything else house could do to help them in the future**.

Focused interviews – key findings

Programming and networking

- In the interviews, both organisations mentioned how **important the programming offer is** from house, which allows them to **take risks they otherwise wouldn't be able to take**.

- They feel that the **network is vital for small organisations'** ability to share and support each other.

- Both organisations mentioned how **important the Edinburgh festival** is to their **programming and networking** saying it's fantastic that house makes it possible for them to go every year.

Audience Development

- The biggest challenges in audience development that were mentioned were **bringing audiences for theatre** and **dance**, in contrast to **comedy** and **music** which are **doing very well**.

- **Cost of living** impacting audience numbers is also a major challenge.

- **Marketing packs** for house tours being **available earlier would help** smaller companies **to deliver a marketing plan**.

- Also, a set of **practical ideas on how to develop new audiences** in particular areas would be useful.

Focused interviews – key findings

Staff skills

- One interviewee mentioned that they are **getting a lot of their training** from the **local council**, so they have **less need from house** in that area.

- Whereas the second interviewee mentioned that having **marketing** (including **CRM**), **front of house** and **box office training** would be very useful.

Other feedback

- Interviewees asked for greater **transparency** on the decision **behind the programming lists** – suggested that perhaps a longer list with more choices for companies expressing interest in certain shows would be useful, rather than a pre-selected menu. They would like more visibility of how the decisions behind the programming offer are made.

- One organisation didn't fill out the survey because they felt they already have **a great direct communication** with house and continuously give their feedback to the team.

FULL RESULTS

About your organisation
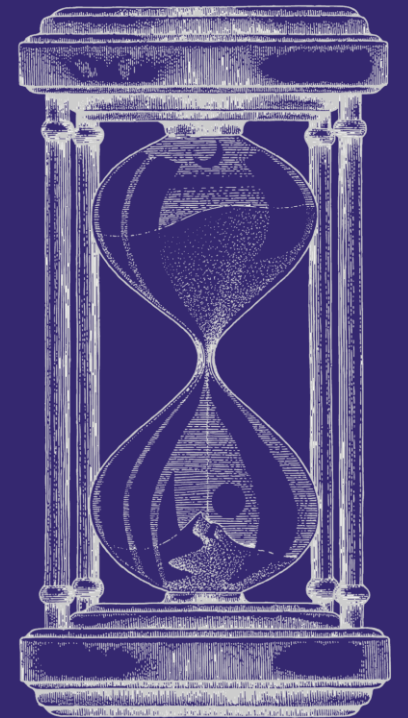
Which of these options BEST describes your organisation?

Answered: 72 Skipped: 0

Category	Percentage
Arts centre / multi-arts venue	56%
Theatre	31%
Music venue	4%
Community venue	4%
Library (with performance space)	0%
Other (please specify)	6%
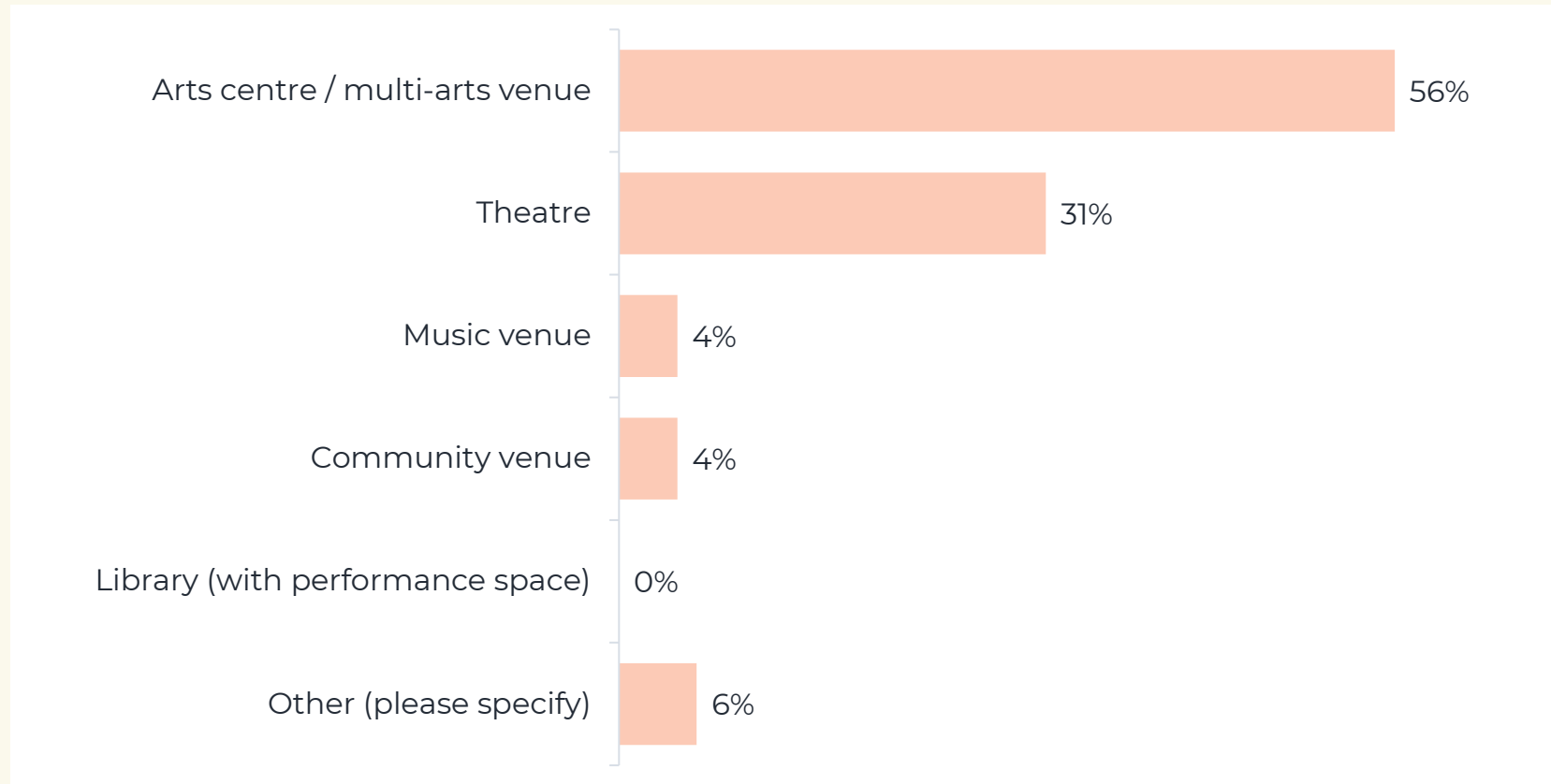
Which of the following best describes the size of your organisation?

Answered: 72   Skipped: 0

49%	46%	6%
Small scale	Medium scale	Large scale
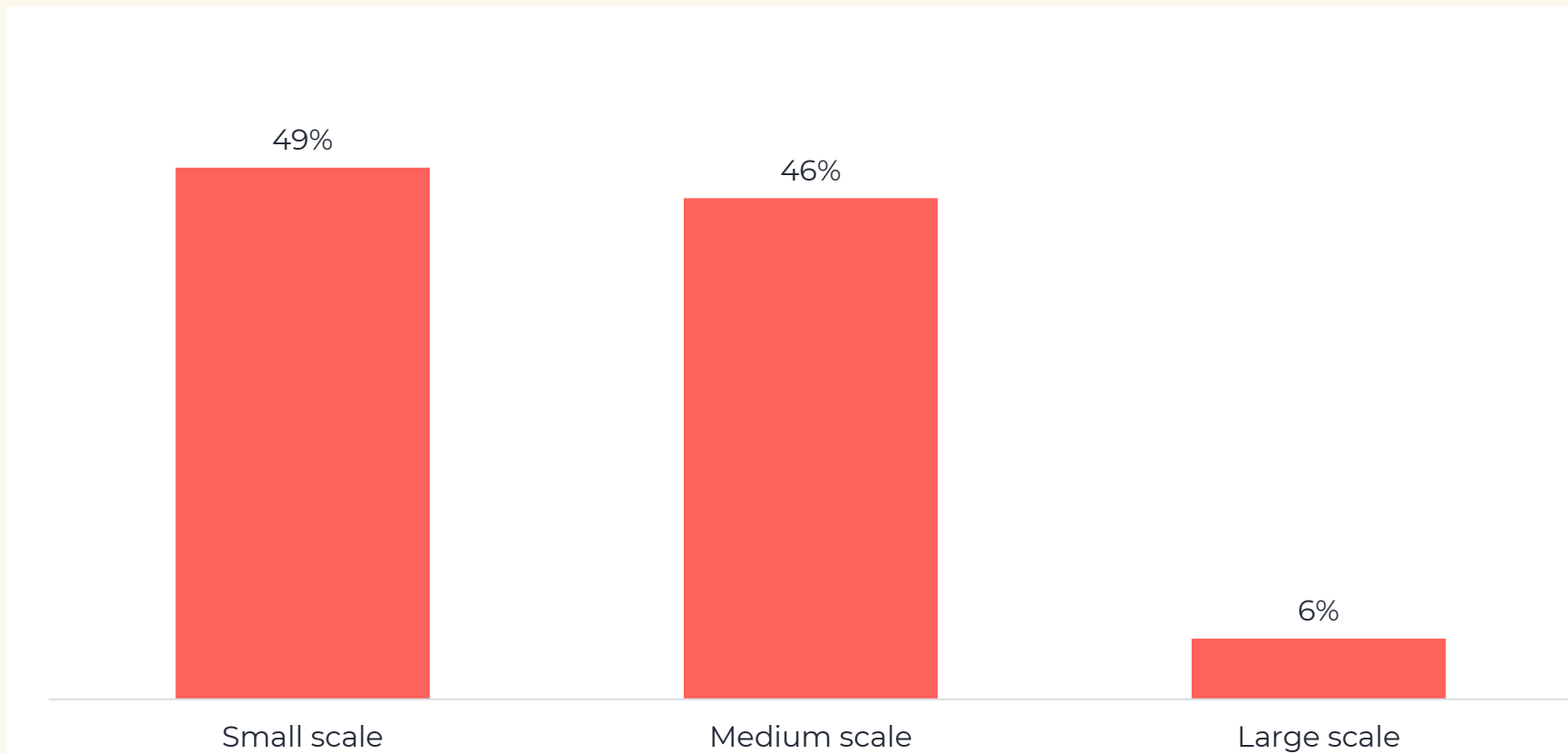
Do you receive funding from any of the following sources?

Answered: 72   Skipped: 0

Source	Percentage
Local authority	42%
Arts Council England - NPO funding	38%
Councils and/or local economic partnerships	24%
Other (please specify)	22%
Arts Council England - project/other funding	17%
None of the above	17%

house southeast theatre network

in association with indigo
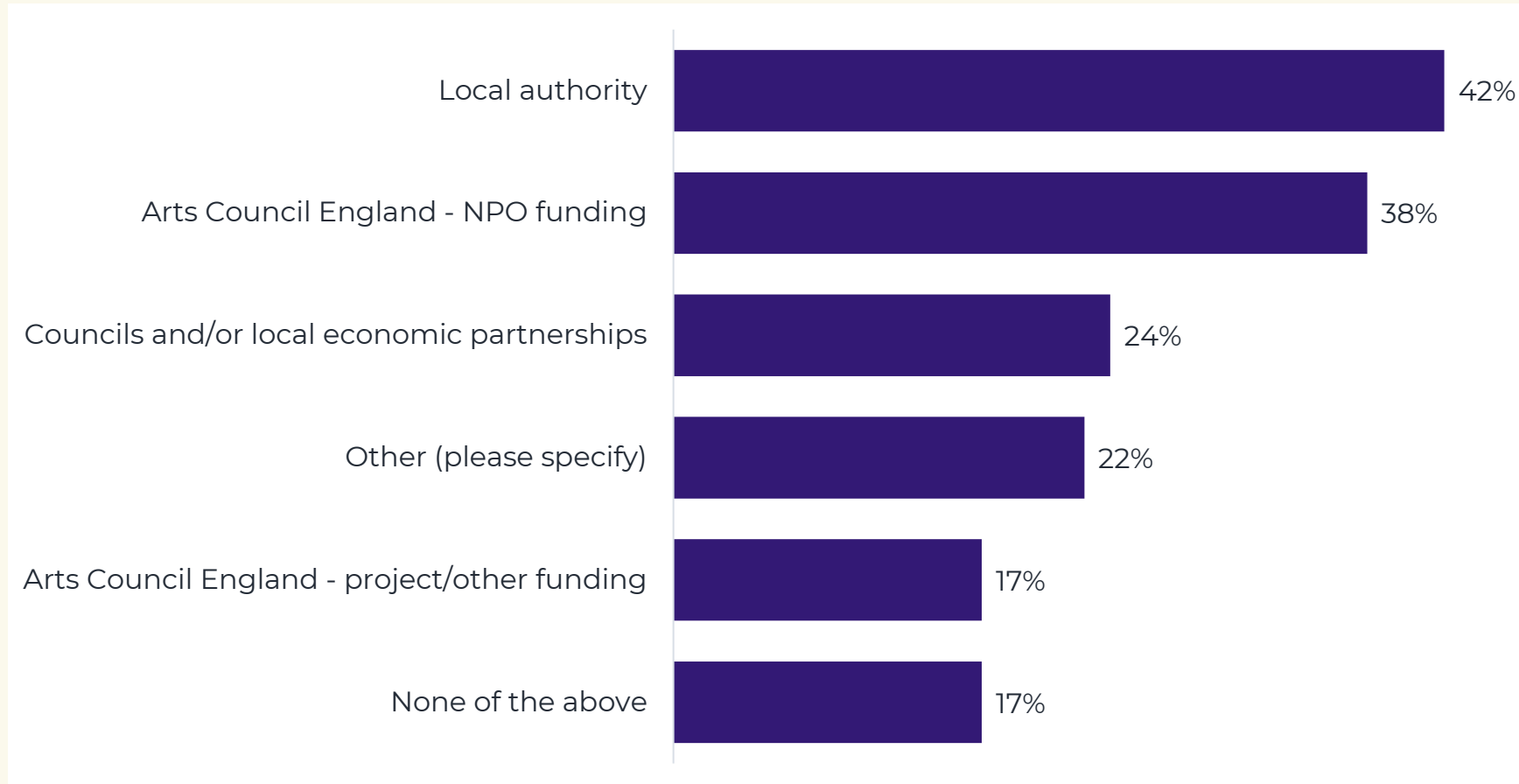
Is your organisation a local authority owned and managed venue?

Answered: 72 Skipped: 0

14%

86%
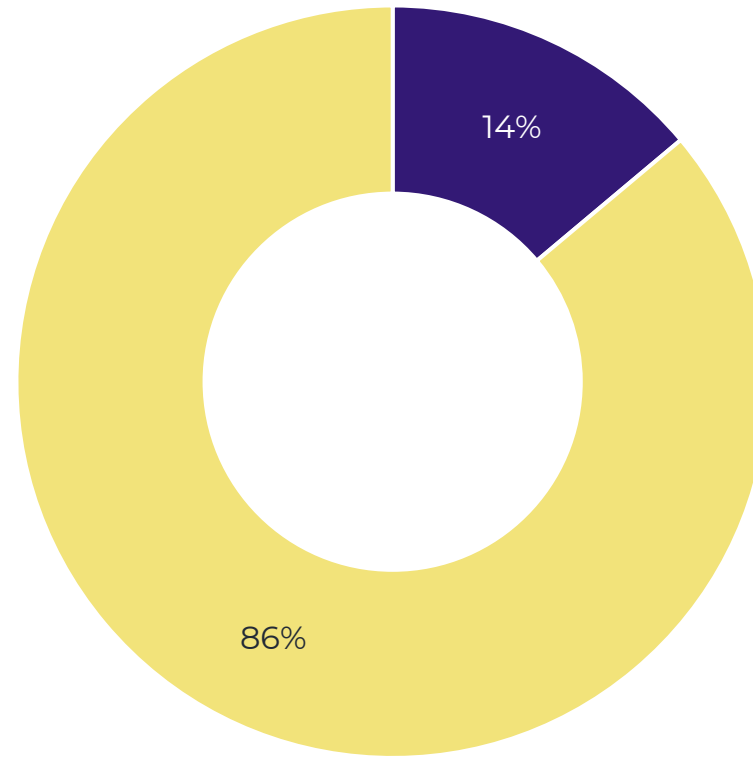
■ Yes ■ No

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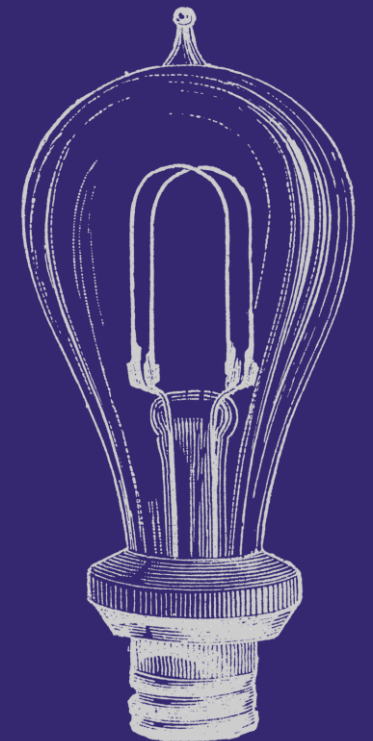
How far in advance do you tend to book your programme?

Answered: 72   Skipped: 0

Bar chart showing booking advance times:
- Less than 3 months: 0%
- 3 - 6 months: 13%
- 6 - 12 months: 67%
- 1 - 2 years: 21%
- More than 2 years: 0%
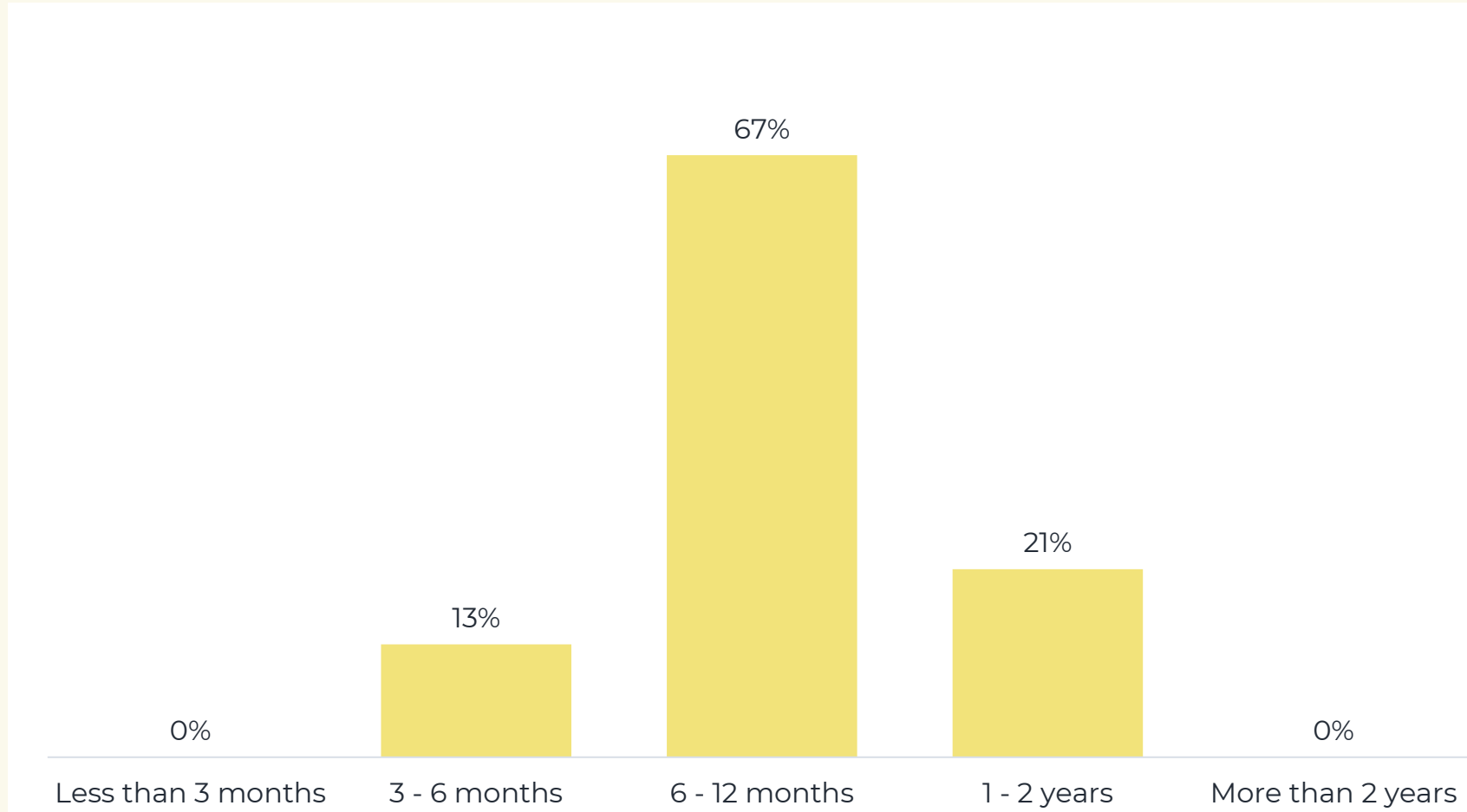
How do you tend to source your programme?

Answered: 72   Skipped: 0

Source	Percentage
Recommendations from industry colleagues	89%
Seeing live performances (e.g. at festivals)	85%
Re-programming theatre companies	83%
house's tour programme offer	75%
Emails from companies we have no previous relationship with	74%
We produce our programme in-house	47%
tour-finder.org	14%
Other (please specify)	15%
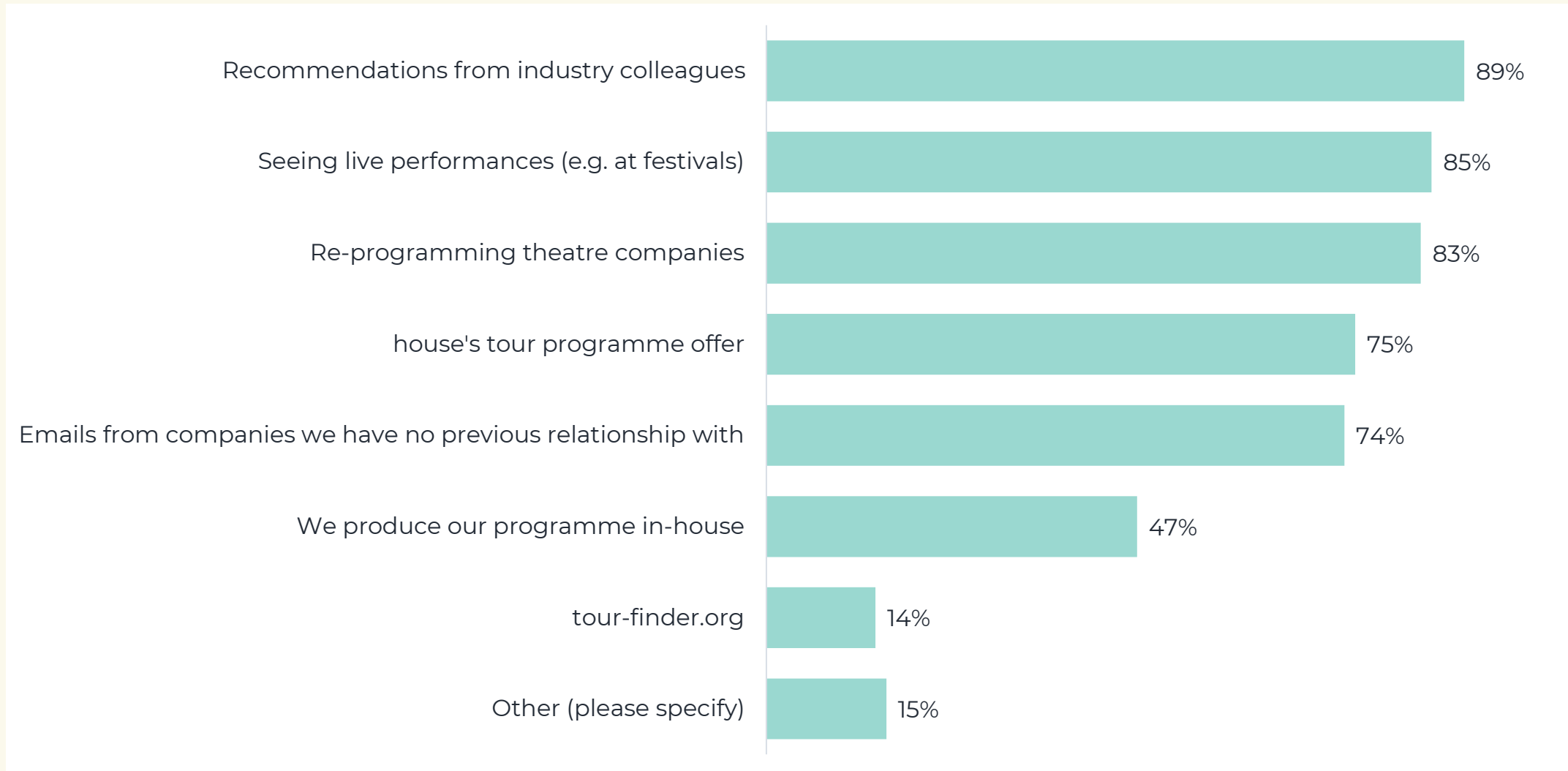
What type of work do you produce or programme?

Answered: 72 Skipped: 0

Type of work	Percentage
Theatre	94%
Family work	93%
Music	92%
Comedy	89%
Community engagement events	86%
Workshops	85%
Dance	69%
Film	61%
Spoken word	58%
Exhibitions	54%
Outdoor arts	53%
Events outside of your usual performance spaces	44%
Circus	40%
Festivals	40%
Other (please specify)	10%
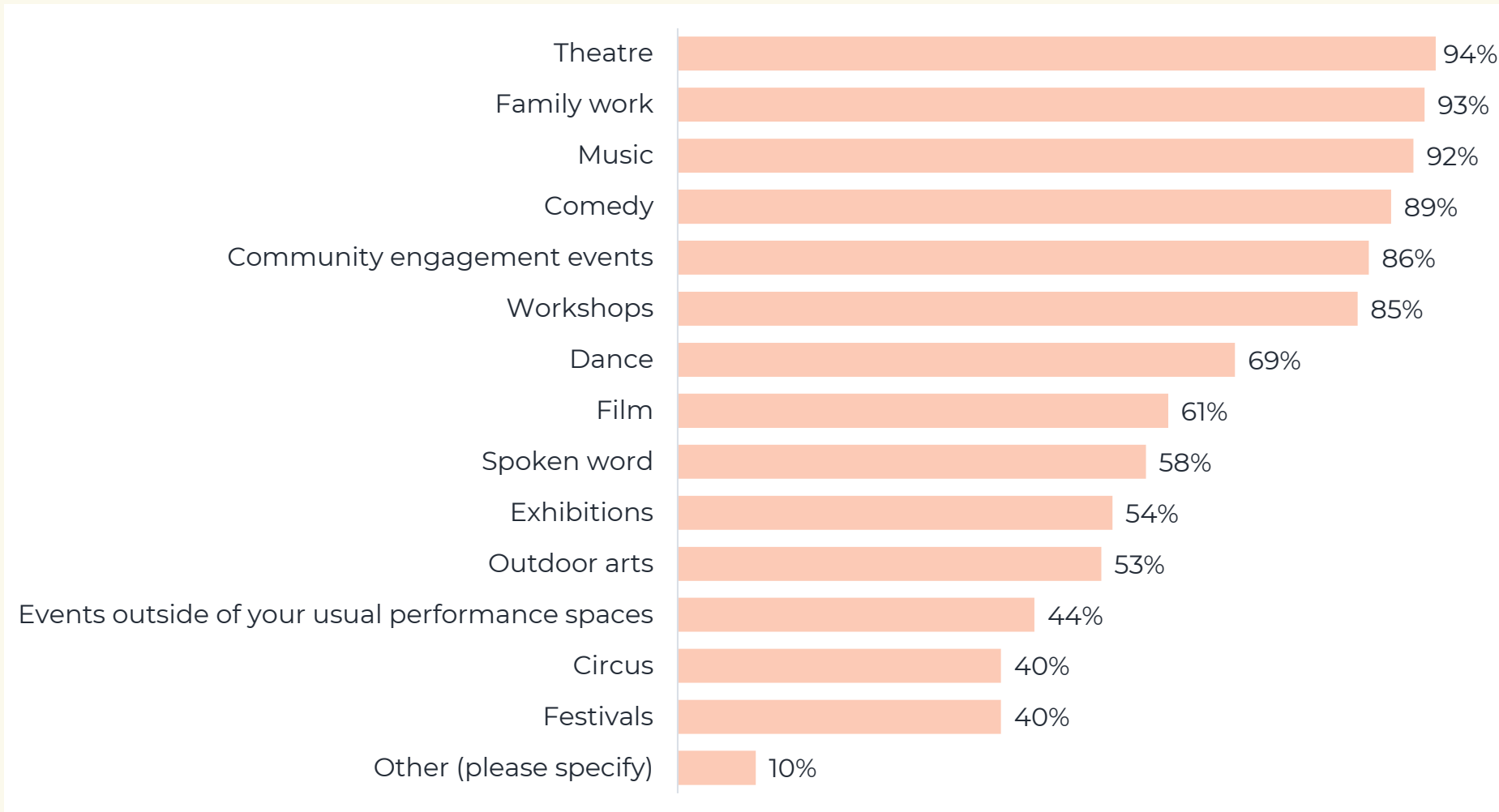
Of the types of work you are NOT currently producing or programming, do you plan to produce or programme any of these IN THE FUTURE?

Answered: 70 Skipped: 2

Category	Percentage
Festivals	20%
Outdoor arts	17%
Events outside of your usual performance spaces	16%
Circus	9%
Other (please specify)	7%
Spoken word	7%
Dance	7%
Film	7%
Comedy	7%
Exhibitions	6%
Workshops	3%
Theatre	3%
Community engagement events	1%
Family work	1%
Music	1%
[Insert text from Other]	0%
None of the above	39%
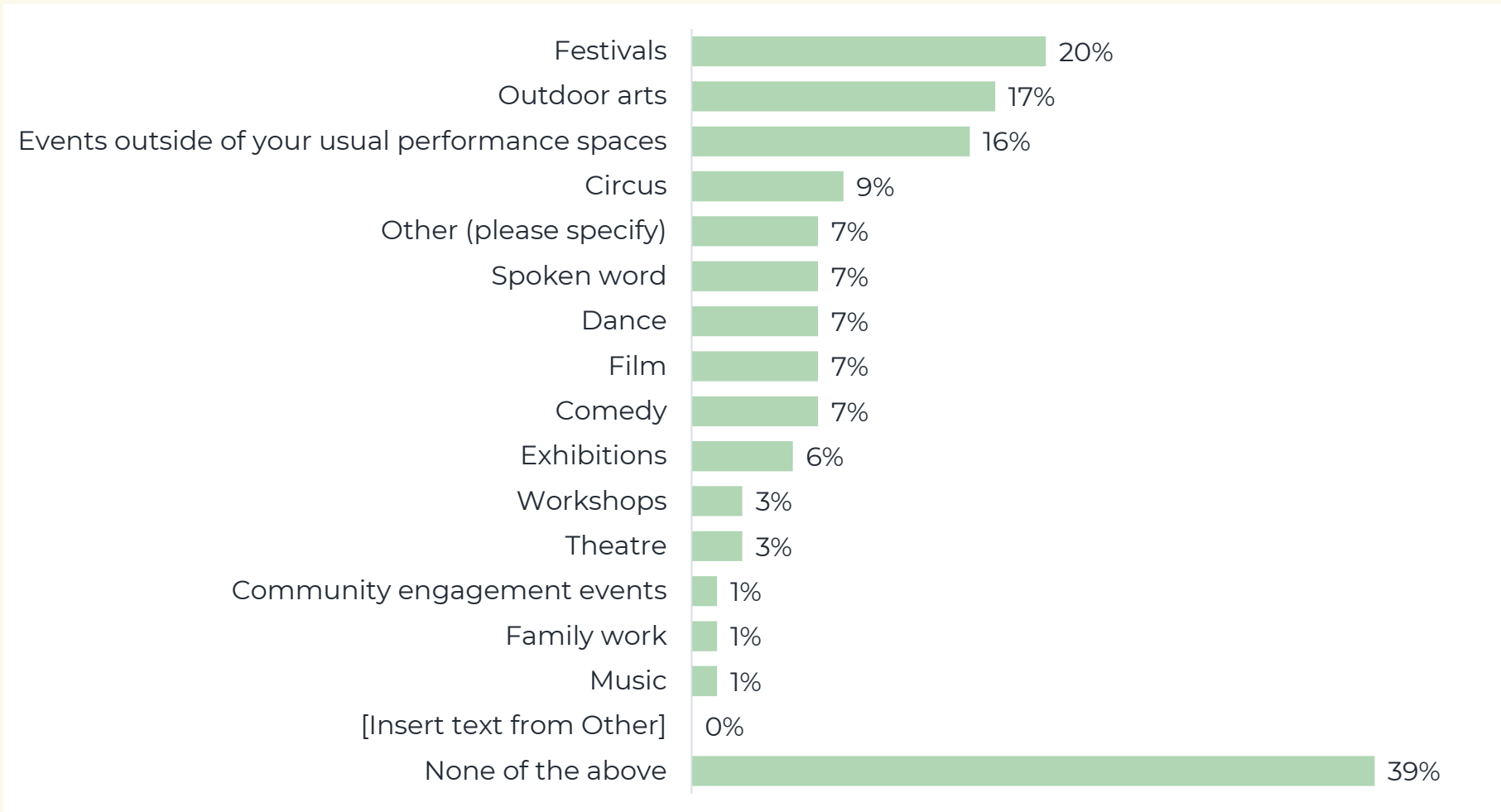
Is there anything in particular stopping you from programming these types of work now?

Answered: 67   Skipped: 5

Response	Percentage
We don't think we have an audience for it	39%
We don't have enough funding	34%
We don't have the appropriate infrastructure	30%
They are more financially risky	28%
We don't have the staff capacity to seek out programme	27%
It doesn't align with our current business or audience development plan	21%
There is a lack of available touring programme	9%
We're just not sure where to start	7%
Other (please specify)	19%

Do you offer any of the following types of access performances? Of those you said you don't currently offer, are you planning to offer any in the future?

Answered: 72 Skipped: 0   Answered: 45 Skipped: 27

	Currently offering	Not offering but planning to	Not offering and not planning to
Relaxed performances	74%	10%	17%
BSL interpreted performances	64%	10%	26%
Captioned performances	40%	11%	49%
Audio-described performances	36%	15%	49%
None of the above	24%	32%	44%

■ Currently offering   ■ Not offering but planning to   ■ Not offering and not planning to
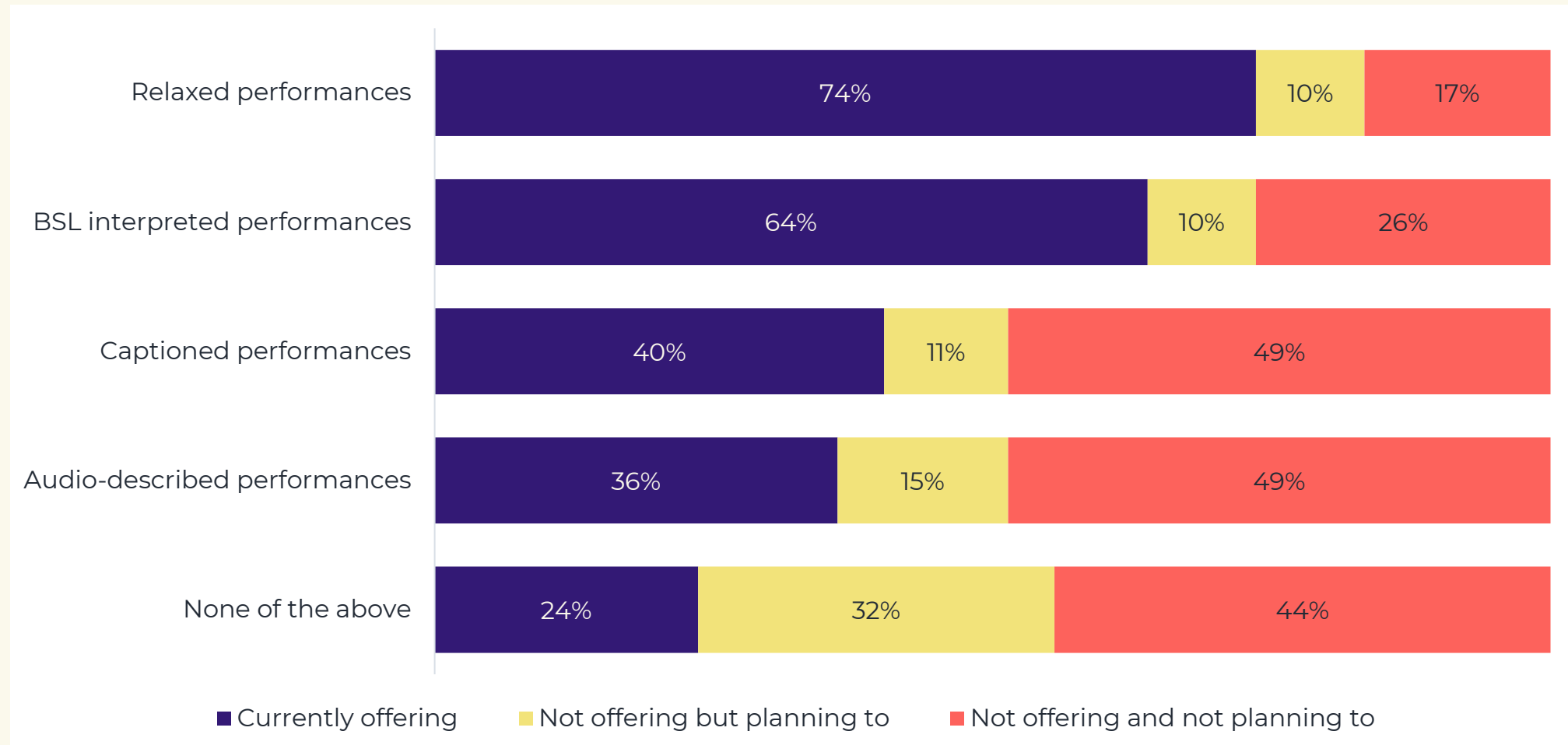
What are the barriers to programming more accessible performances?

Answered: 72 Skipped: 0

house
southeast
theatre network

in association with
indigo

Barrier	Percentage
Cost	88%
Difficult on short runs	69%
Lack of appropriate equipment	57%
Lack of capacity	42%
Lack of staff training or skills	29%
Unsure how to reach audiences who would benefit	19%
Other (please specify)	7%
None of the above	4%
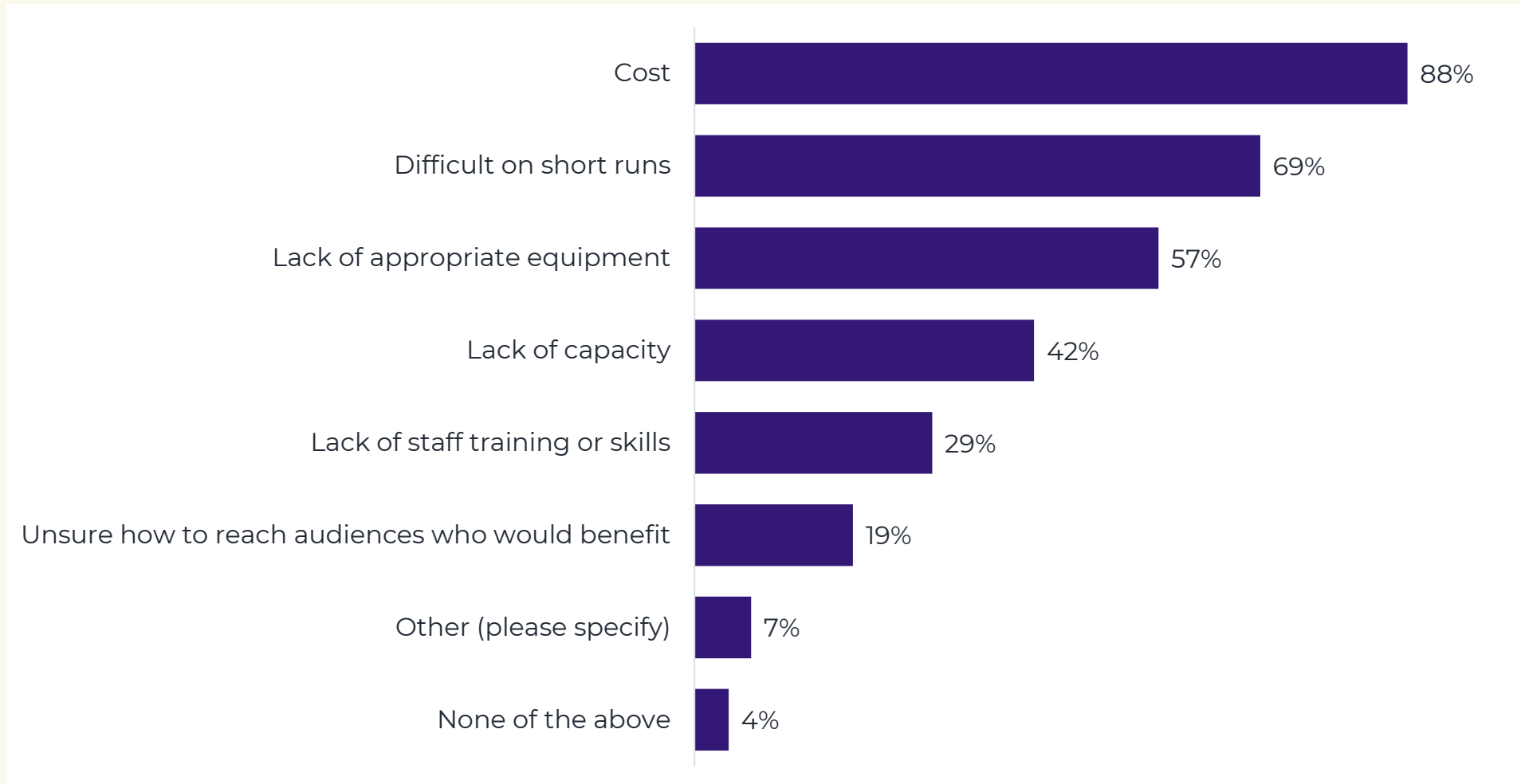
Compared to this time last year, would you say the number of days or weeks you are programming live performances (e.g. theatre, dance, circus) across the year has increased or decreased?

Answered: 72 Skipped: 0

| 11% | 40% | 43% | 4% |

1%

■ Decreased significantly ■ Decreased ■ Stayed about the same ■ Increased ■ Increased significantly
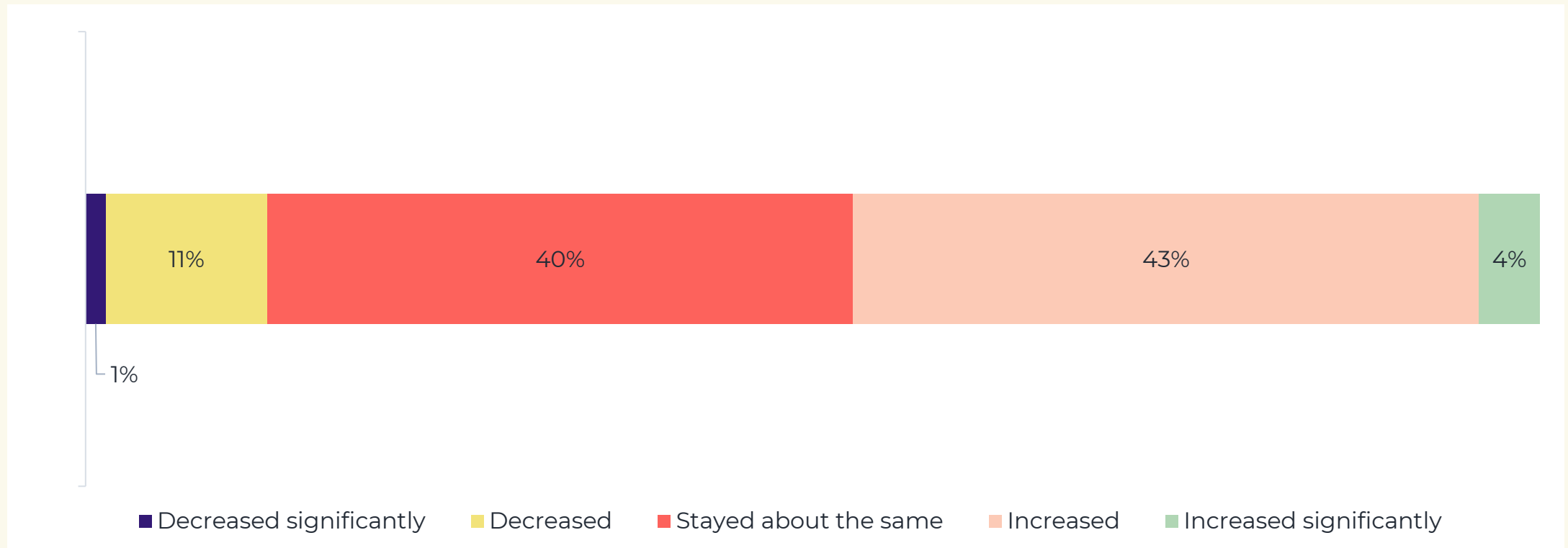
Are any of the following reasons for why your programming has decreased?

Answered: 9 Skipped: 63

Reason	Percentage
Low sales	56%
Reduced staffing capacity	44%
Lack of audience demand	33%
Lack of available product	33%
Cut to regular funding	22%
Deliberate change in programming policies or priorities	22%
Not receiving anticipated project funding	11%
Other (please specify)	33%
None of the above	0%
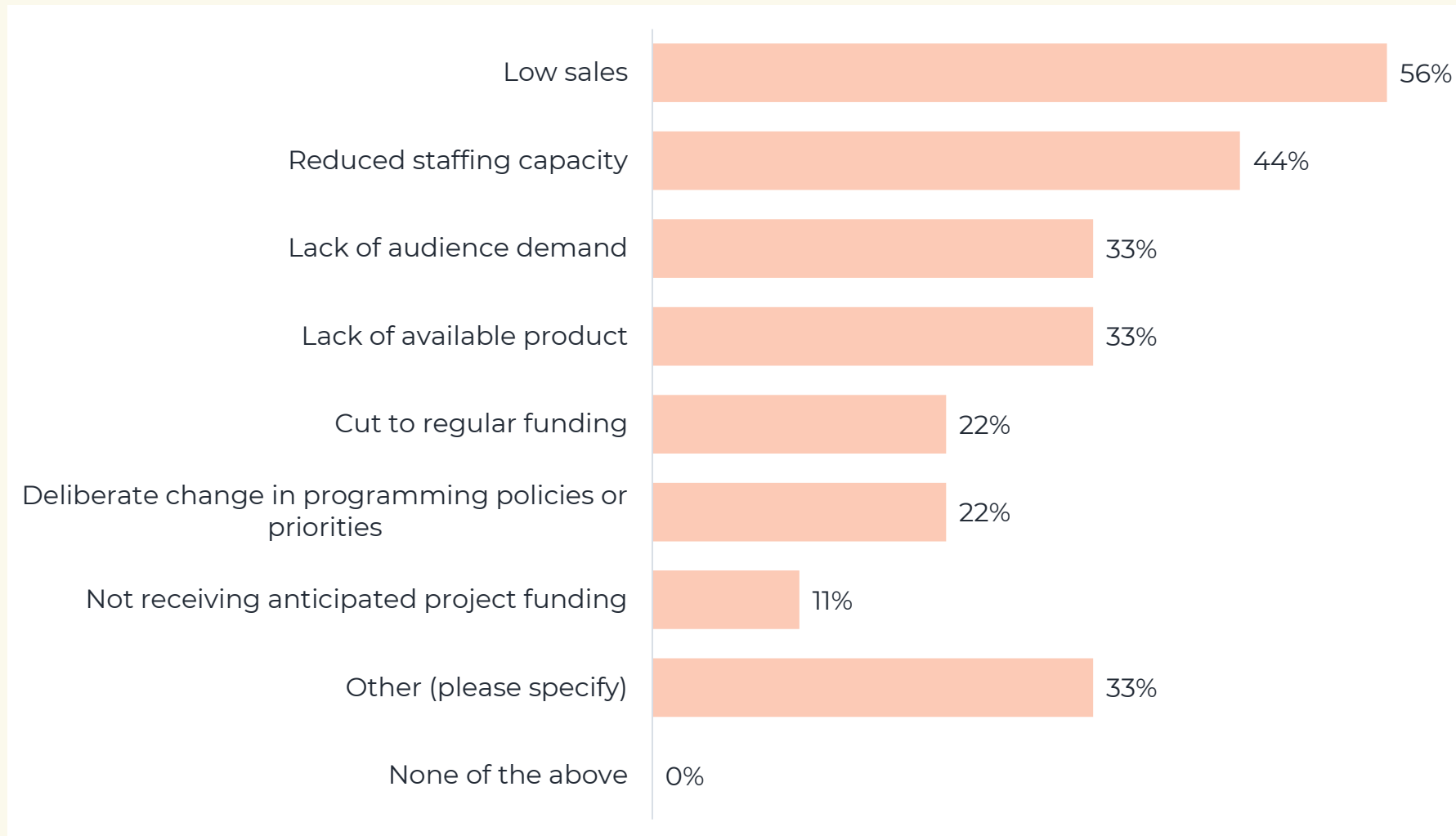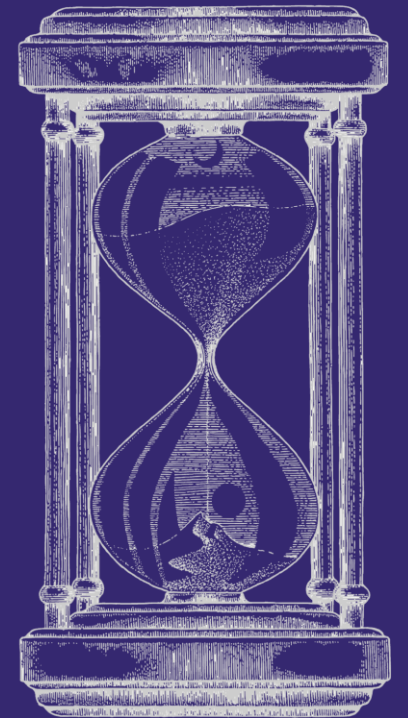
Audiences

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: 70 Skipped: 2

| 19% | 69% | 10% | 3% |

■ Less than 25% ■ 25 - 50% ■ 51 - 75% ■ More than 75% ■ Not sure
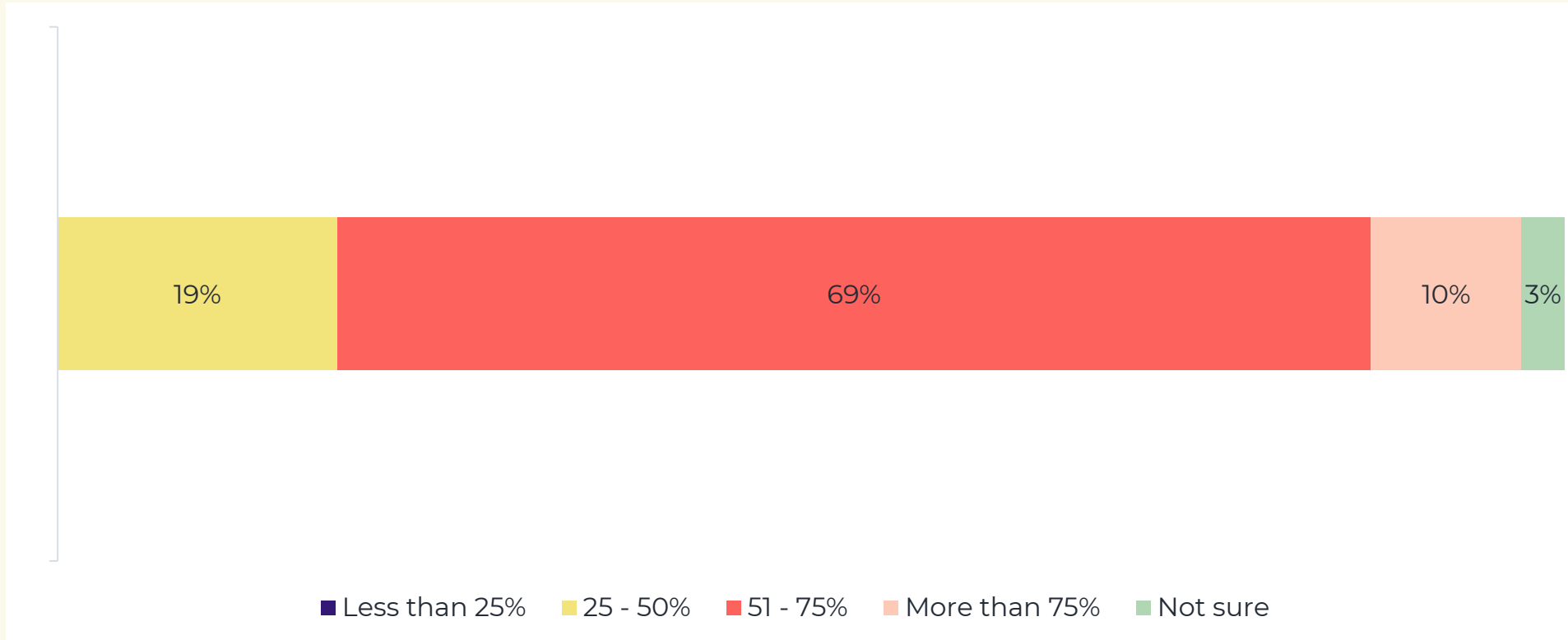
Does your organisation have an audience development plan?

Answered: 70 Skipped: 2

47%

53%

■ Yes ■ No
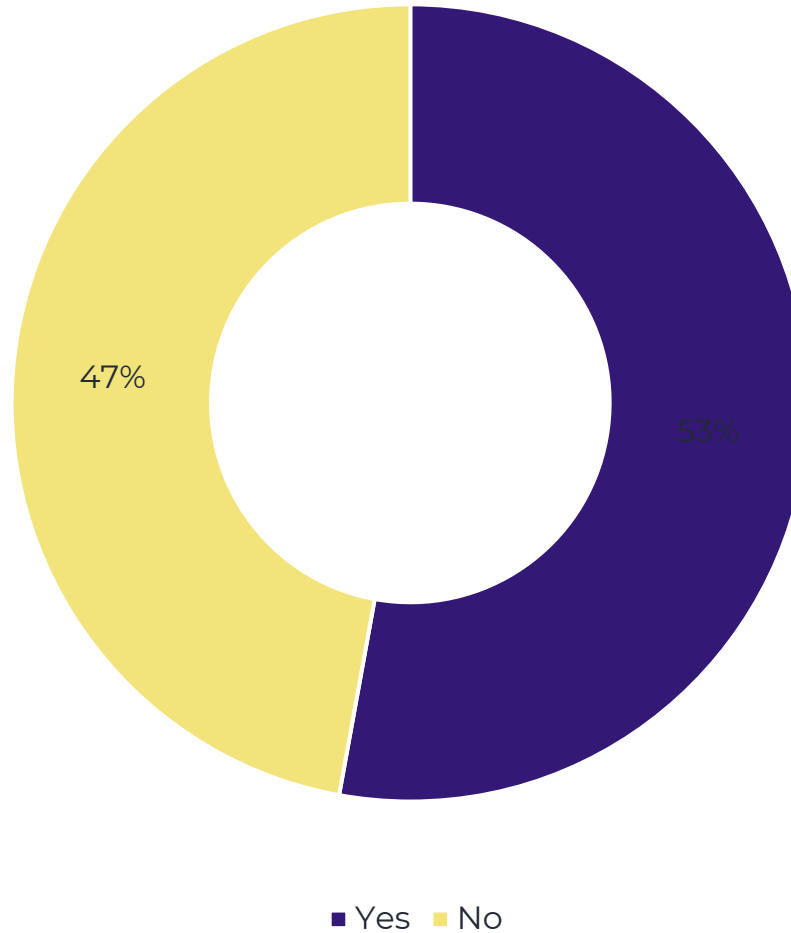
Why do you not have an audience development plan?

Answered: 33 Skipped: 39

Response	Percentage
We don't have capacity	39%
We are currently creating one or planning to soon	30%
We're not sure where to start	21%
We have a marketing strategy which covers audience development	15%
We don't feel we need one	6%
Other (please specify)	18%
None of the above	0%
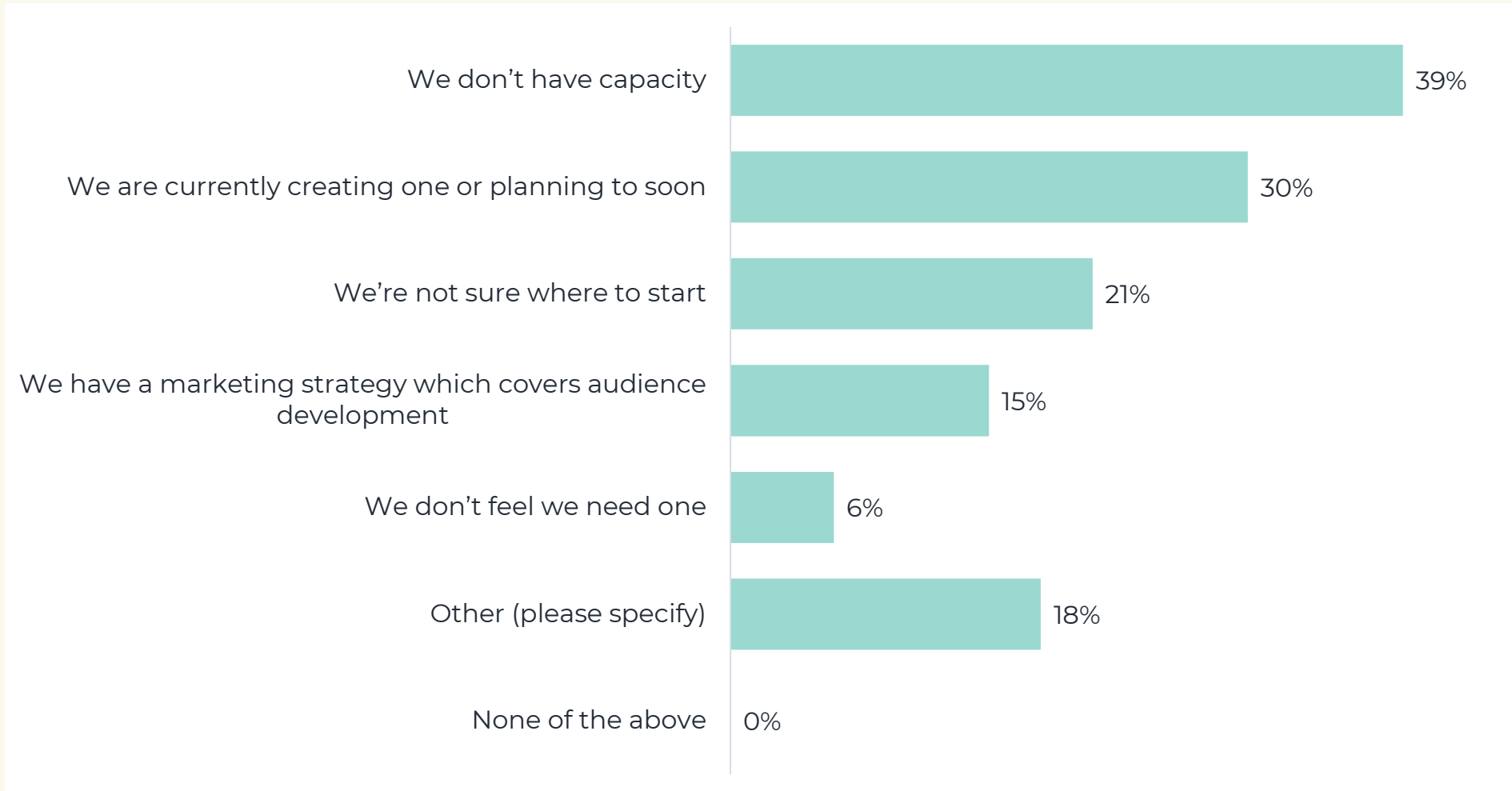
When was your audience development plan created or updated?

Answered: 36   Skipped: 36

Not sure	In the last 6 months	6 months to a year ago	1 - 2 years ago	More than 2 years ago
6%	25%	33%	31%	6%
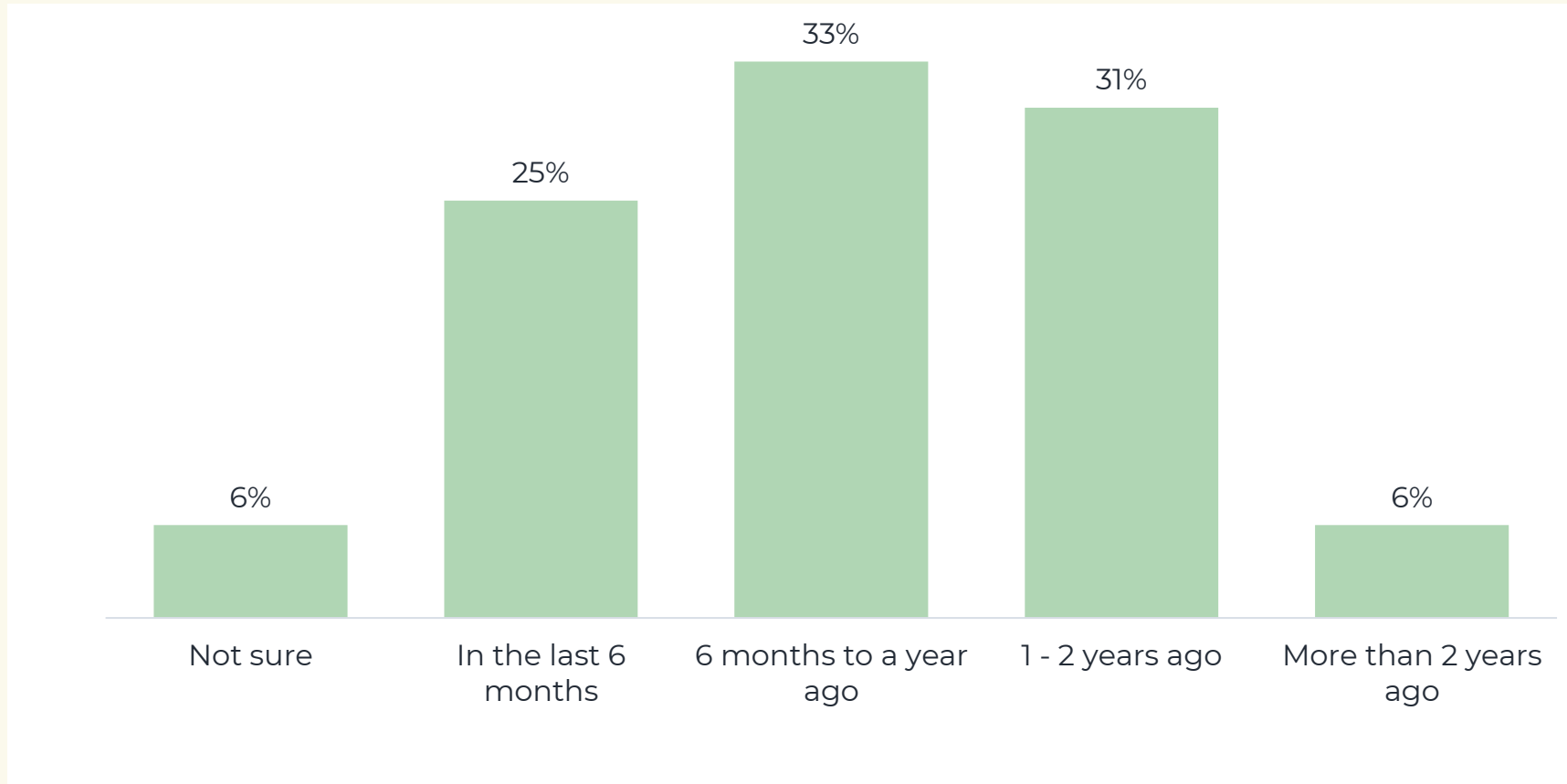
Which of the following, if any, does your audience development plan focus on?

Answered: 36   Skipped: 36

Category	Percentage
Increasing audiences overall	89%
Reaching new audiences to your venue	83%
Engaging with groups who typically are less engaged...	69%
Increasing frequency of attendance	69%
Reaching more diverse audiences	64%
Reaching younger audiences	64%
Ensuring first time attenders return	61%
Ensuring your audience is representative of your local...	58%
Increasing audiences for a particular type of work	56%
Adapting our programme to attract different audiences	44%
Re-engaging with lapsed audiences	44%
Feeling more connected with audiences	33%
Encouraging participation or volunteering	33%
Other (please specify)	3%

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

Answered: 35   Skipped: 37

Category	Percentage
A higher proportion of new bookers	49%
Increased audiences to particular types of event	40%
Increased audiences overall	34%
A higher return rate of first time bookers	26%
More younger audiences	23%
Adapting our programme in response to our…	20%
Feeling more connected with audiences	17%
Increased numbers of participants or volunteers	17%
Increased frequency of attendance	17%
A more representative audience	11%
A higher proportion of new bookers who are typically…	11%
Fewer lapsed bookers	9%
Greater ethnic diversity of audience members	9%
Other (please specify)	14%
None of the above: we're not currently implementing…	20%

How confident are you in measuring the impact of your audience development plan?

Answered: 41   Skipped: 4

| 3% | 31% | 54% | 11% |

■ Not at all confident   ■ Not very confident   ■ Neutral   ■ Fairly confident   ■ Very confident

Engaging with house

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

Answered: 69   Skipped: 3

	Never	A little	A lot
Programming shows	15%	54%	31%
Attending festivals / conferences as part of the house delegation	35%	35%	30%
Attending regional networking meetings	29%	43%	28%
Attending our Network Day	27%	47%	26%

■ Never ■ A little ■ A lot

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

Answered: 69   Skipped: 3

	Never	A little	A lot
Attending Pitch Up events	44%	45%	11%
Accessing training	37%	54%	10%
Participating in pilot projects e.g. our Take Your Seats scheme or our sustainable travel pilot	73%	18%	8%
Accessing bursaries for conferences / events not hosted by house	68%	24%	8%
Using resources on the house website	33%	63%	5%

house southeast theatre network

in association with indigo

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

Answered: 68   Skipped: 4

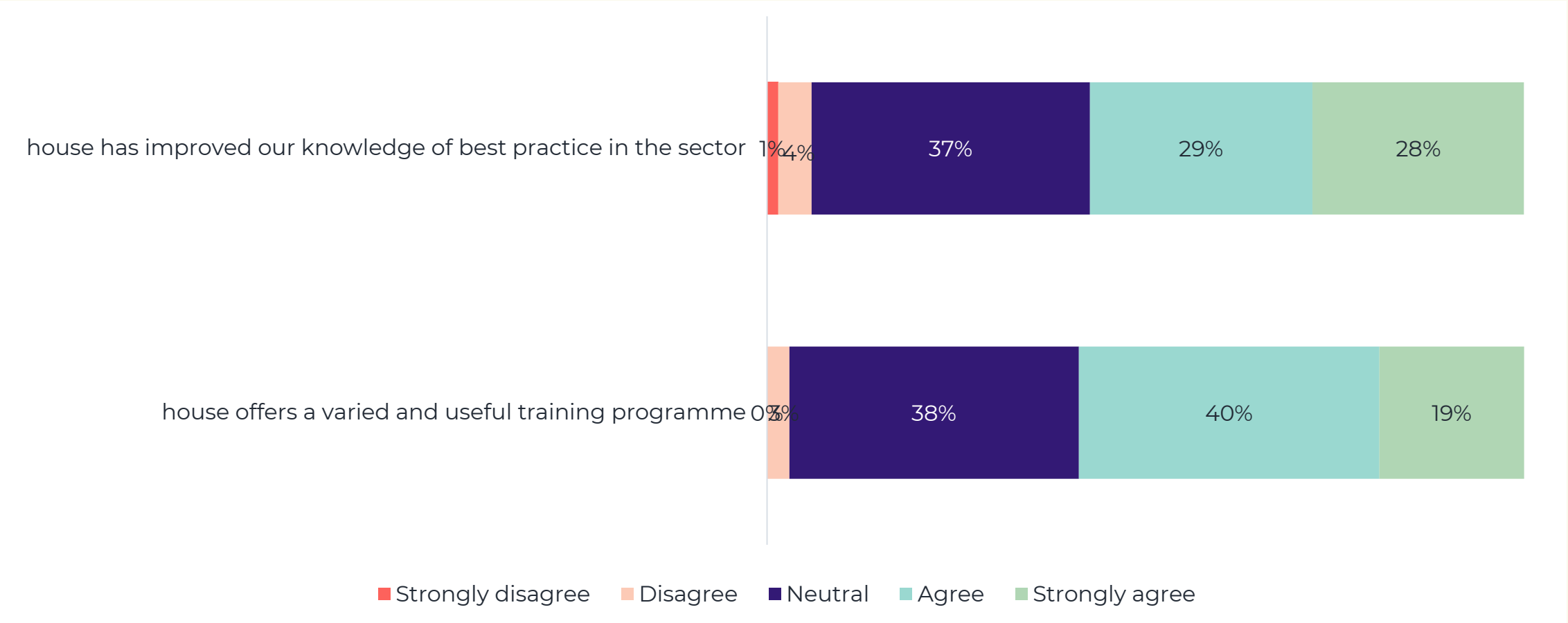| Channel	Percentage
Direct communication with house team	82%
Email newsletter	76%
Website	24%
Linkedin	3%
Twitter	1%
Other (please specify)	1%
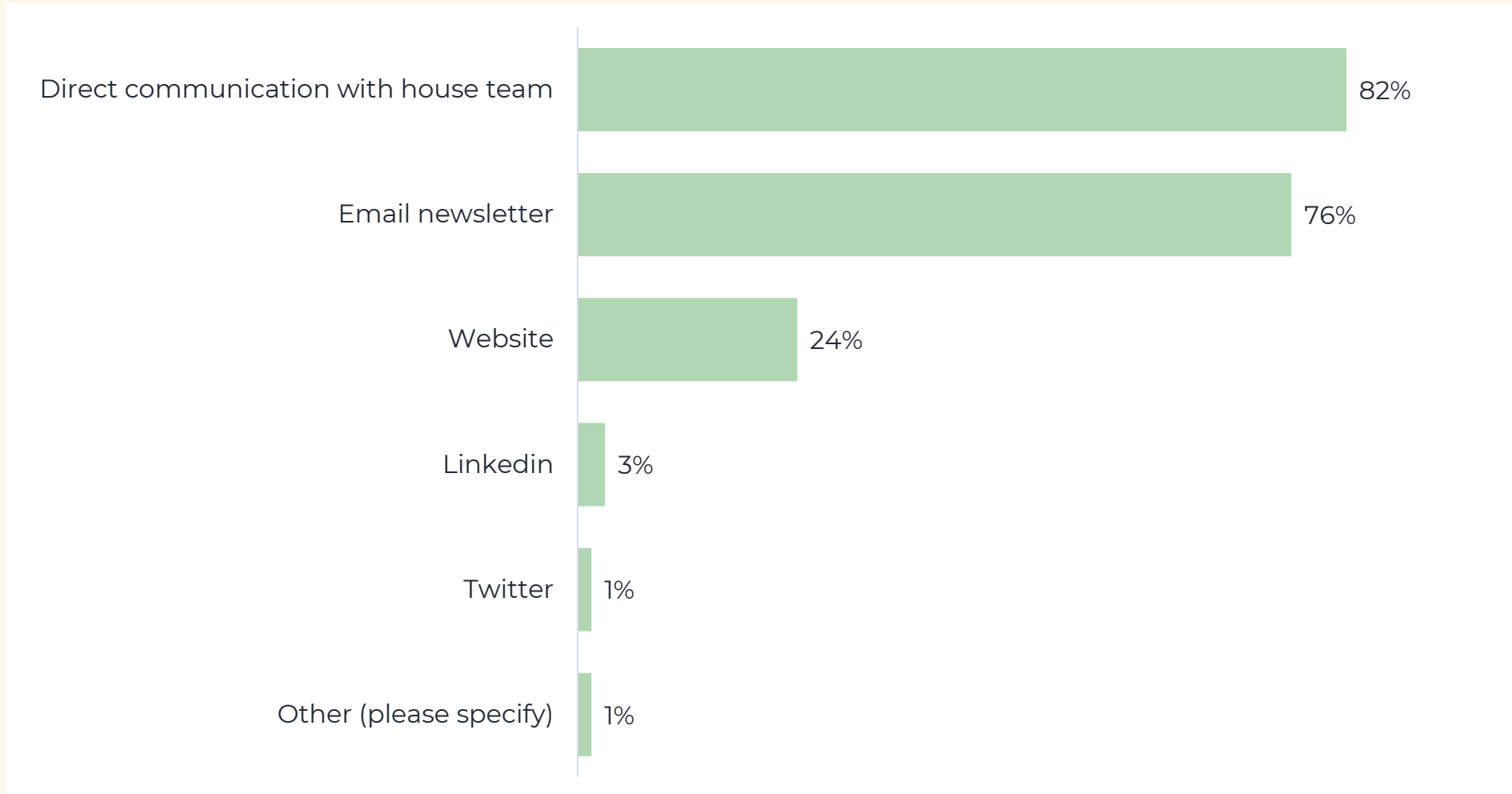
To what extent do you agree or disagree with the following statements about programming?

Answered: 68   Skipped: 4

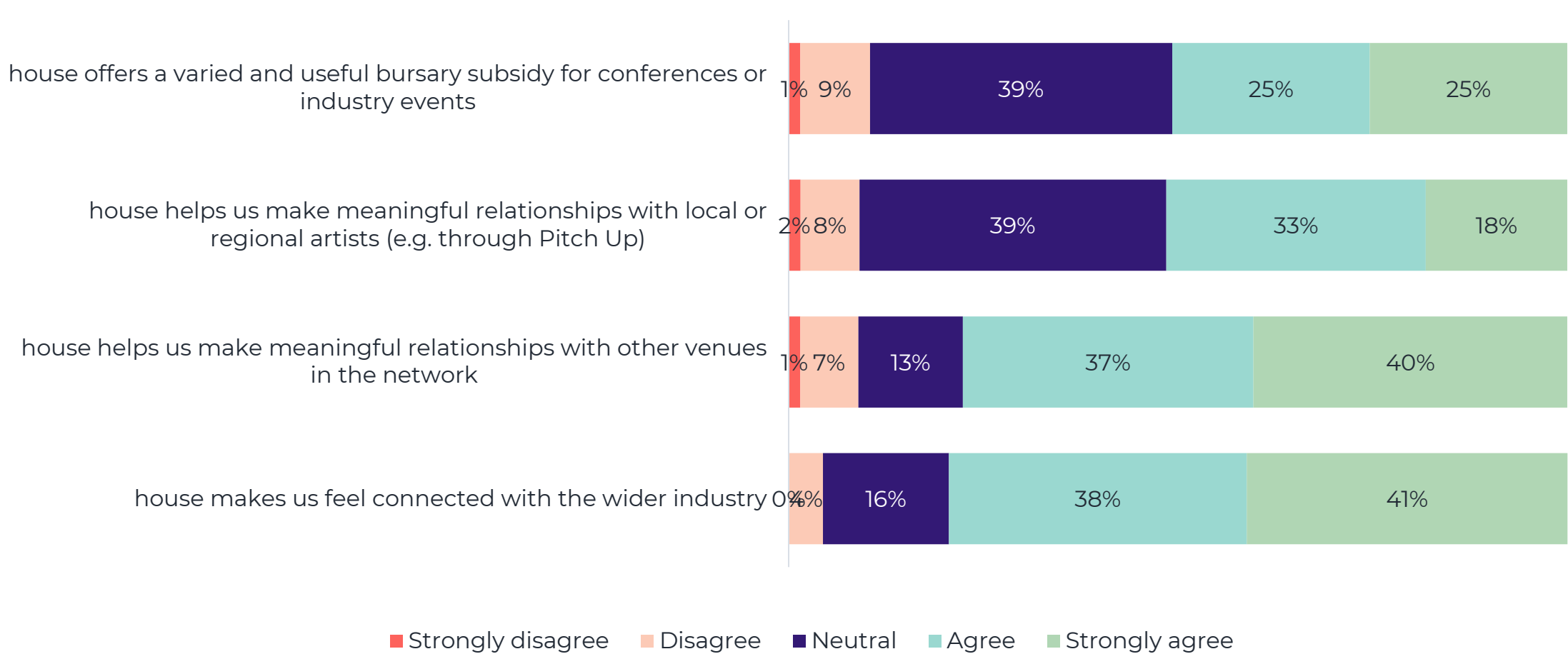| Statement	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
house helps us offer a more varied and diverse programme of work	1%	6%	18%	40%	35%
house helps us reach more diverse audiences	3%	15%	40%	32%	10%
house helps us grow our audience numbers	3%	12%	47%	28%	10%
house helps us to programme more international work	1%	19%	46%	25%	9%

■ Strongly disagree ■ Disagree ■ Neutral ■ Agree ■ Strongly agree
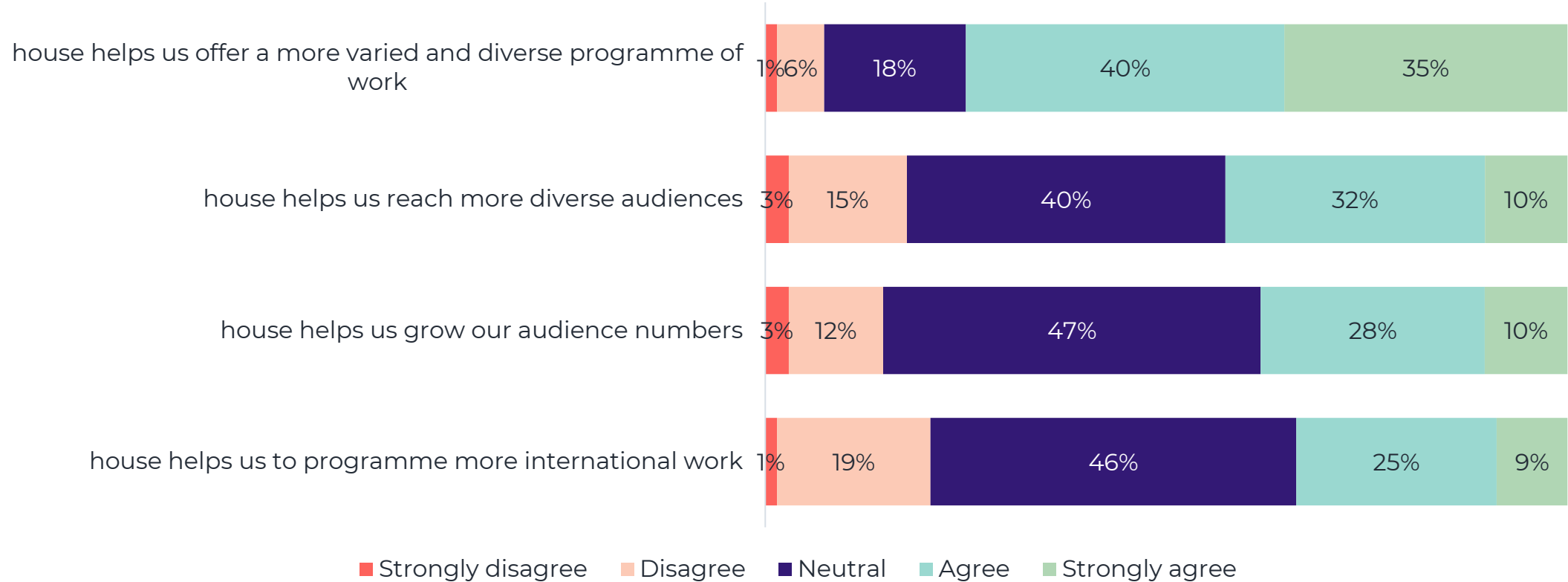
To what extent do you agree or disagree with the following statements about training?

Answered: 41   Skipped: 4

house has improved our knowledge of best practice in the sector — 1% 4% 37% 29% 28%

house offers a varied and useful training programme — 0% 3% 38% 40% 19%

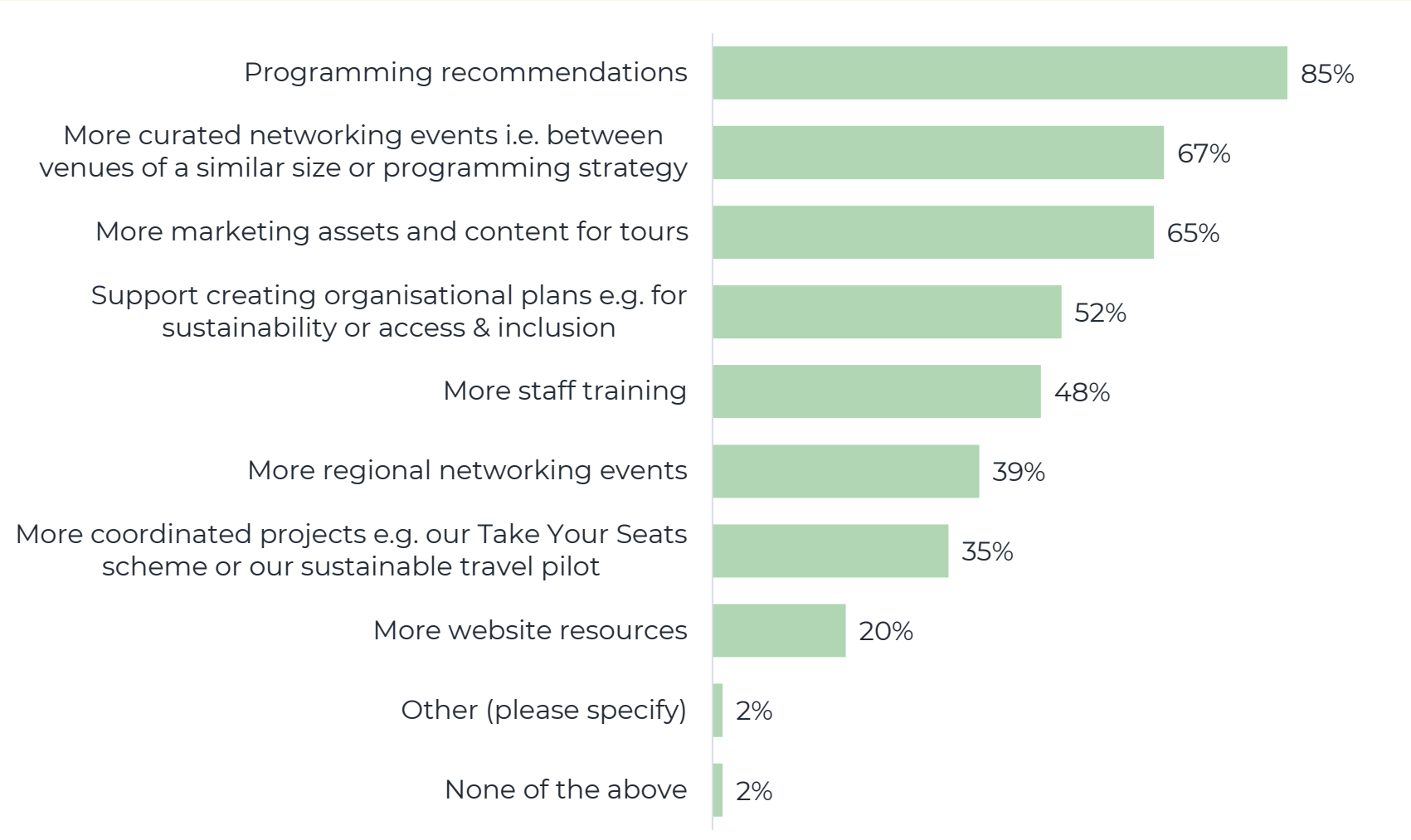■ Strongly disagree   ■ Disagree   ■ Neutral   ■ Agree   ■ Strongly agree

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

Answered: 68   Skipped: 4

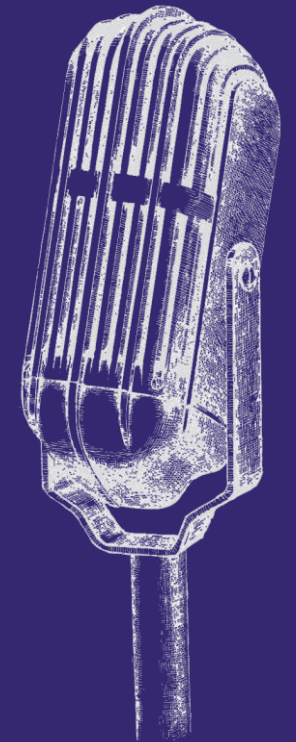| Statement	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
house offers a varied and useful bursary subsidy for conferences or industry events	1%	9%	39%	25%	25%
house helps us make meaningful relationships with local or regional artists (e.g. through Pitch Up)	2%	8%	39%	33%	18%
house helps us make meaningful relationships with other venues in the network	1%	7%	13%	37%	40%
house makes us feel connected with the wider industry	0%	6%	16%	38%	41%

■ Strongly disagree ■ Disagree ■ Neutral ■ Agree ■ Strongly agree

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

Answered: 41   Skipped: 4

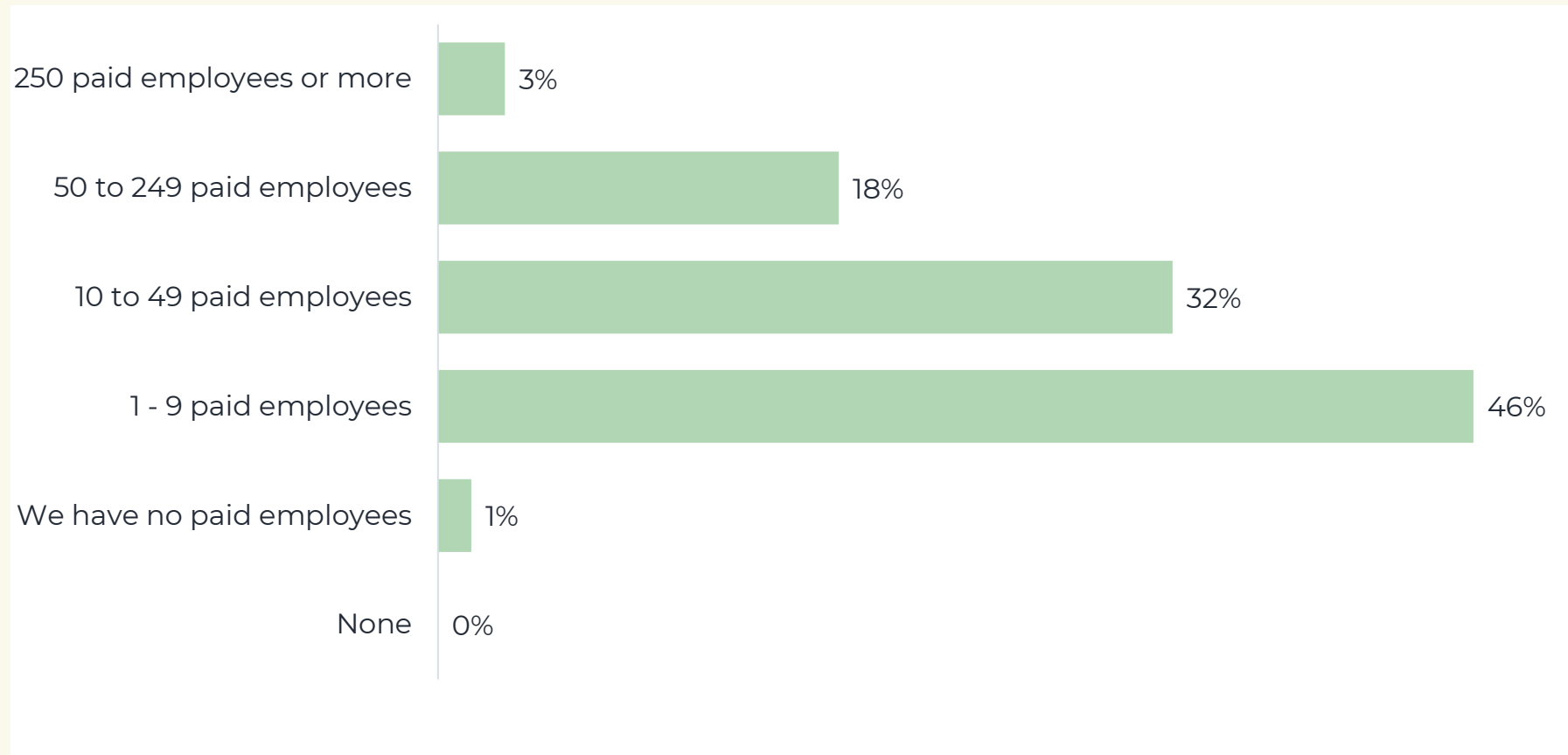| Category	Percentage
Programming recommendations	85%
More curated networking events i.e. between venues of a similar size or programming strategy	67%
More marketing assets and content for tours	65%
Support creating organisational plans e.g. for sustainability or access & inclusion	52%
More staff training	48%
More regional networking events	39%
More coordinated projects e.g. our Take Your Seats scheme or our sustainable travel pilot	35%
More website resources	20%
Other (please specify)	2%
None of the above	2%

Your staff and training needs

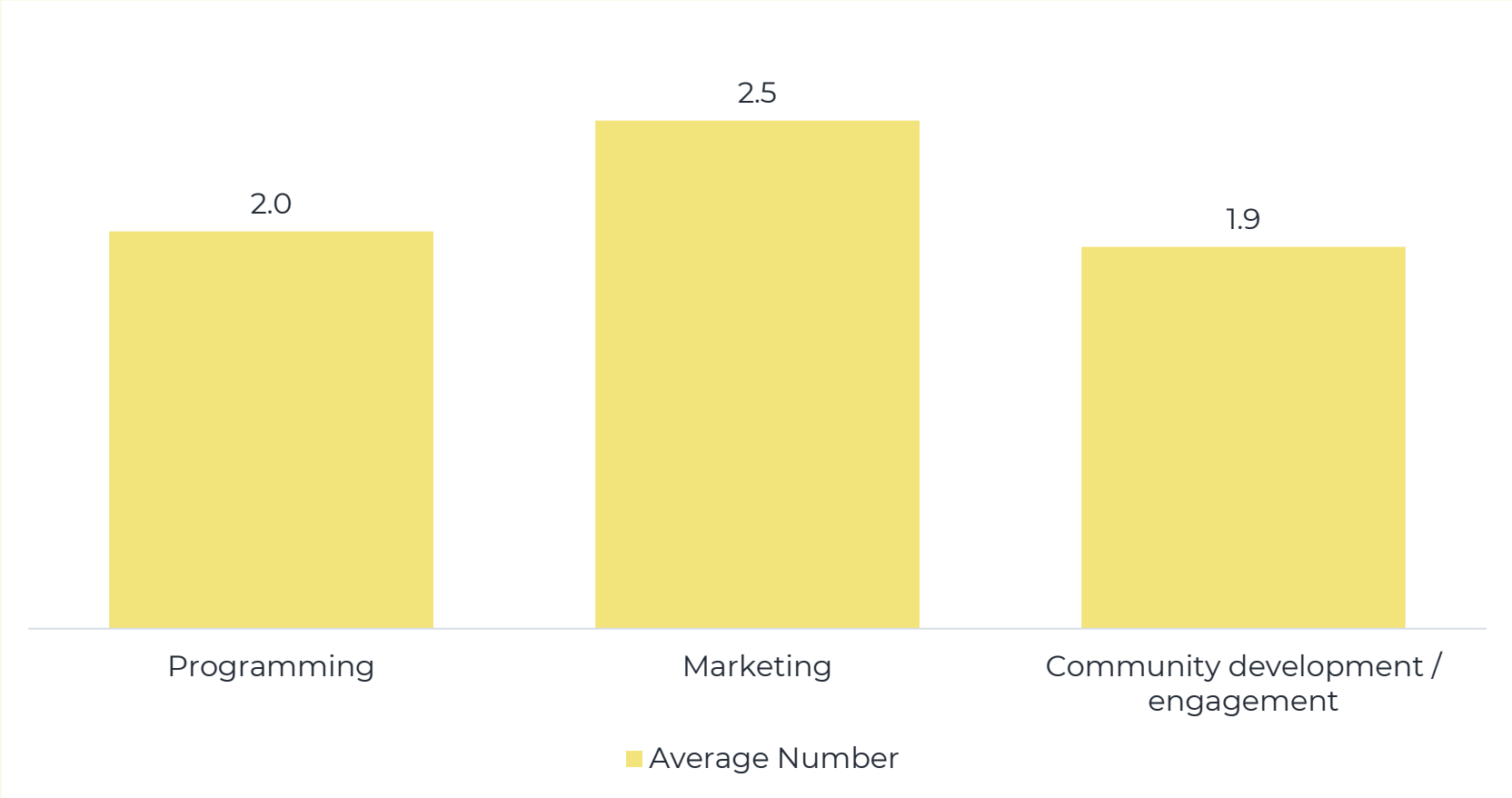# How many paid employees work at your organisation (including fixed term and casual staff)?
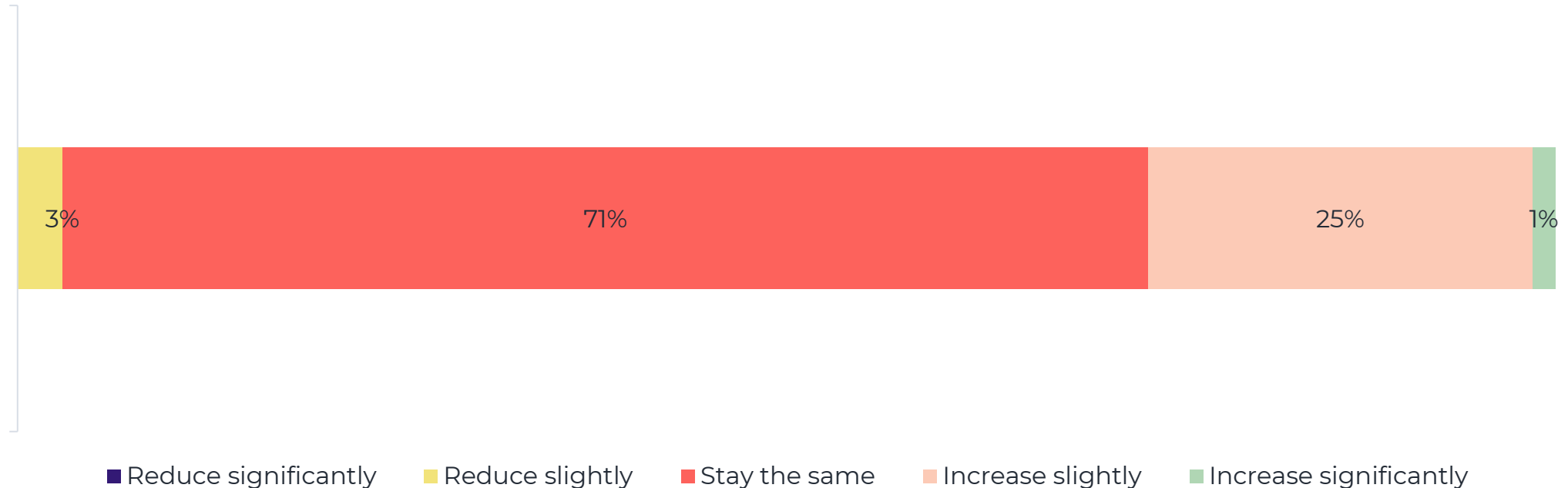
Answered: 68   Skipped: 4

Category	Percentage
250 paid employees or more	3%
50 to 249 paid employees	18%
10 to 49 paid employees	32%
1 - 9 paid employees	46%
We have no paid employees	1%
None	0%

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

Answered: 67   Skipped: 5

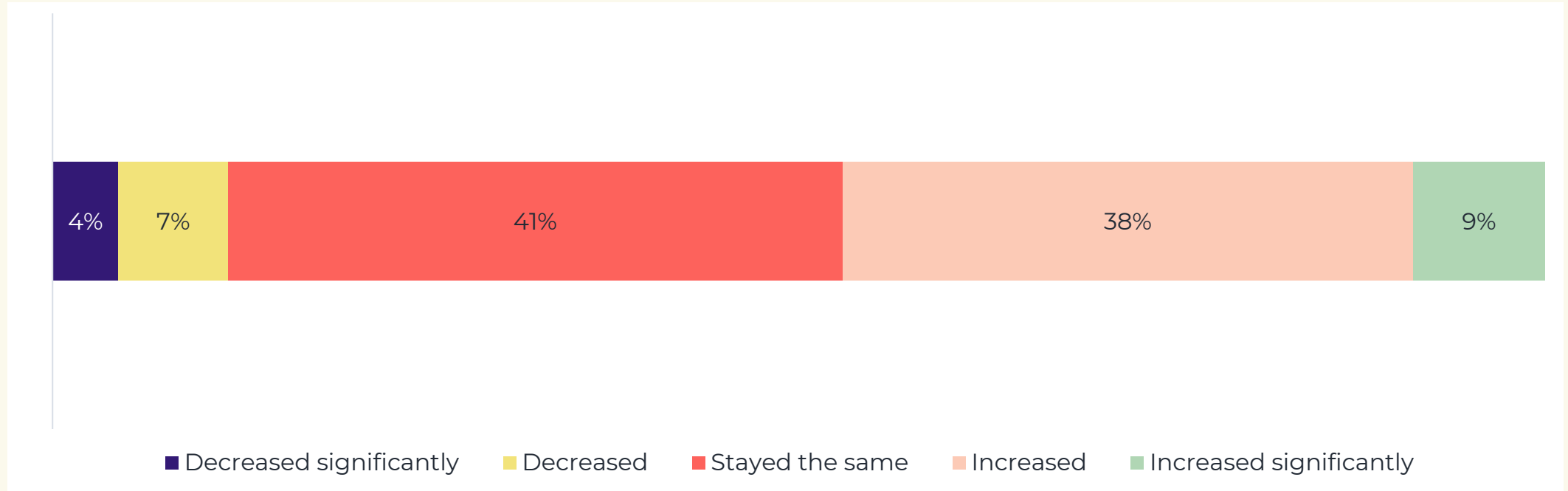# How do you think the size of your staff team will change over the next 6-12 months?

Answered: 68   Skipped: 4

| 3% | 71% | 25% | 1% |

■ Reduce significantly   ■ Reduce slightly   ■ Stay the same   ■ Increase slightly   ■ Increase significantly

house
southeast
theatre network

in association with
indigo

Do you think staff TURNOVER has increased or decreased in the last few years?
# By turnover, we mean staff leaving the organisation.

Answered: 68   Skipped: 4

| 4% | 7% | 41% | 38% | 9% |

■ Decreased significantly   ■ Decreased   ■ Stayed the same   ■ Increased   ■ Increased significantly

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

Answered: 68   Skipped: 4

Category	Percentage
50 volunteers or more	38%
10 to 49 volunteers	34%
1 to 9 volunteers	18%
We don't work with volunteers	10%
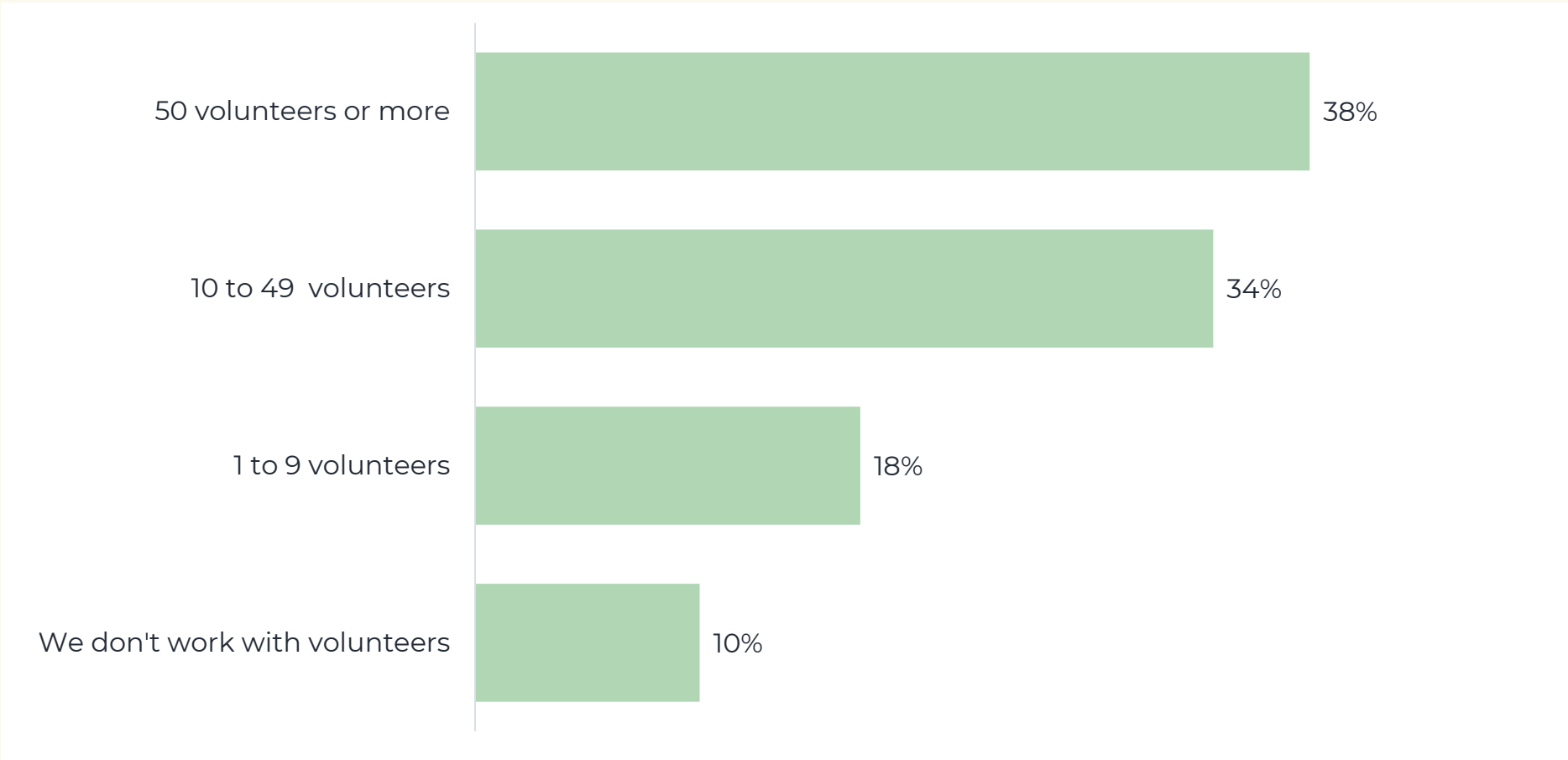
Is your organisation relying more on volunteers than you have in the past?

Answered: 68   Skipped: 4

- **Yes - a lot more** — 16%
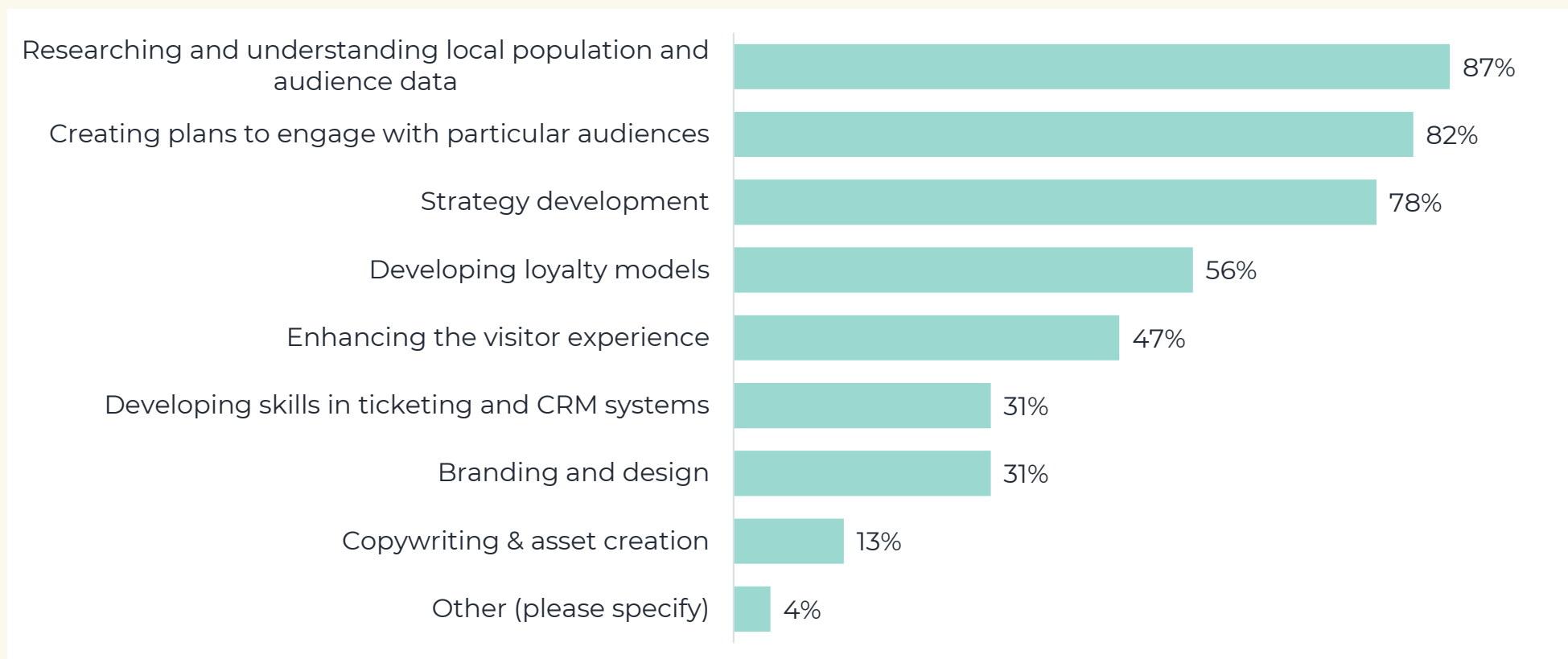- **Yes - a little bit more** — 30%
- **No** — 54%
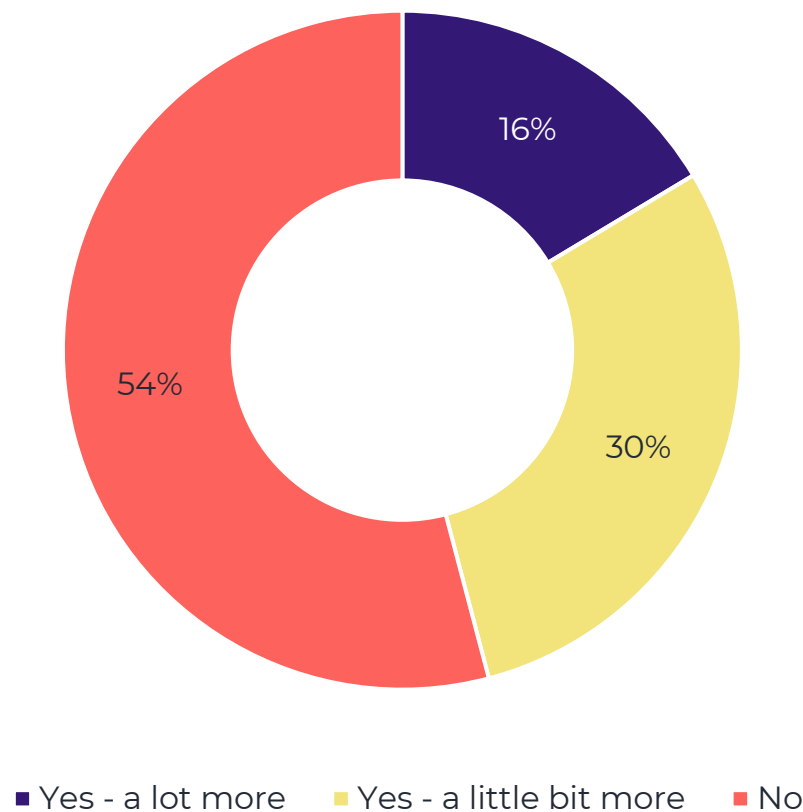
In which areas do you feel staff in your organisation need more training or professional development?

Answered: 68   Skipped: 4

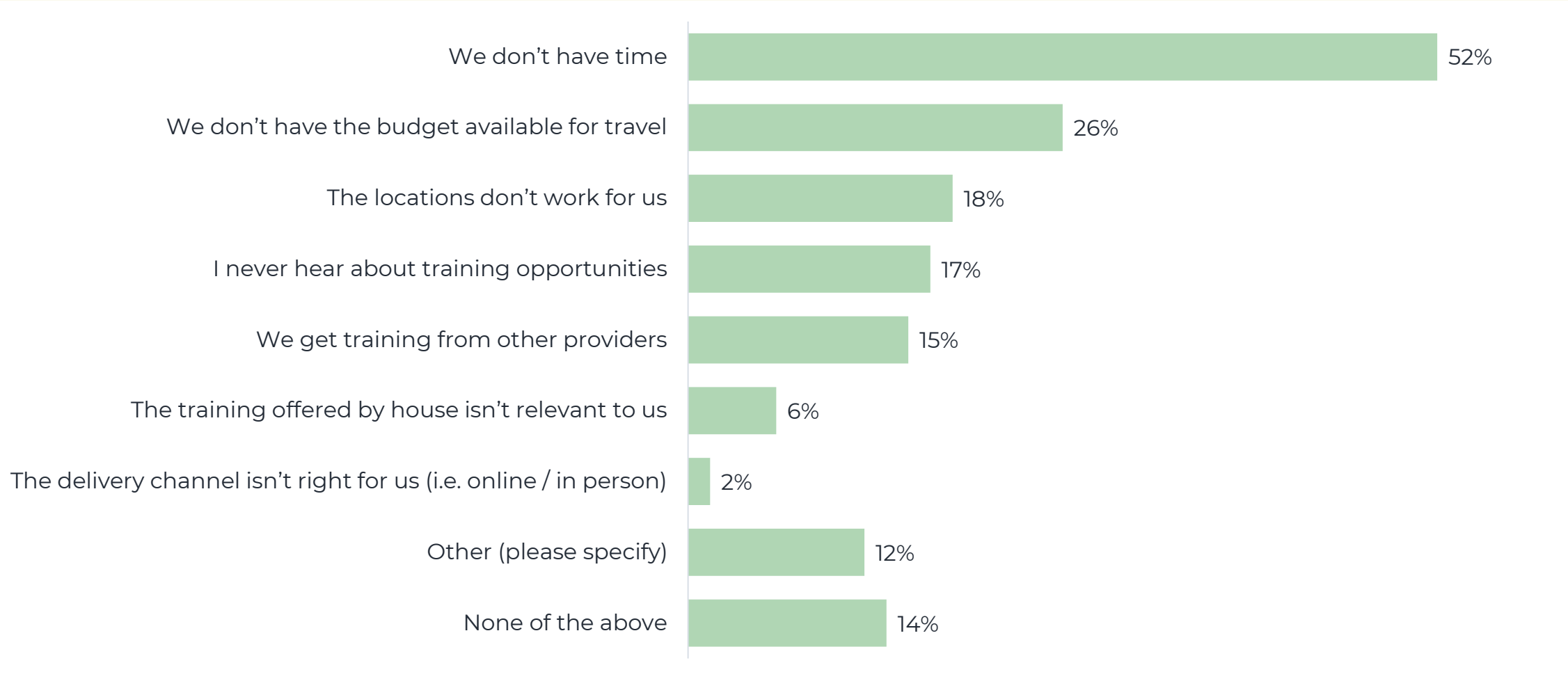| Area	Percentage
Marketing & audience development	69%
Equality, Diversity and Inclusion	59%
Environmental sustainability	53%
Staff health and wellbeing including effective…	44%
Recruiting and training volunteers	37%
Building management/operations	32%
Effective leadership	28%
Programming	28%
Working with Boards & Trustees	25%
Other (please specify)	4%
None of the above	4%

Are there particular areas of marketing and audience development your organisation would like more training in?
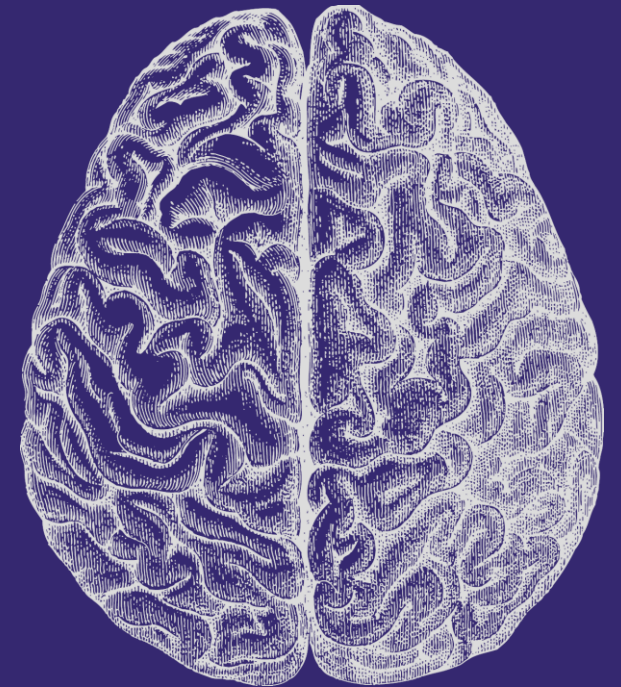
Answered: 45   Skipped: 27

Category	Percentage
Researching and understanding local population and audience data	87%
Creating plans to engage with particular audiences	82%
Strategy development	78%
Developing loyalty models	56%
Enhancing the visitor experience	47%
Developing skills in ticketing and CRM systems	31%
Branding and design	31%
Copywriting & asset creation	13%
Other (please specify)	4%

house southeast theatre network

in association with indigo

What stops you from taking part in more of the training we offer?

Answered: 65   Skipped: 7

Response	Percentage
We don't have time	52%
We don't have the budget available for travel	26%
The locations don't work for us	18%
I never hear about training opportunities	17%
We get training from other providers	15%
The training offered by house isn't relevant to us	6%
The delivery channel isn't right for us (i.e. online / in person)	2%
Other (please specify)	12%
None of the above	14%

Your plans and policies

Does your organisation currently have a plan or policy in place for Equality, Diversity and Inclusion (including accessibility)?
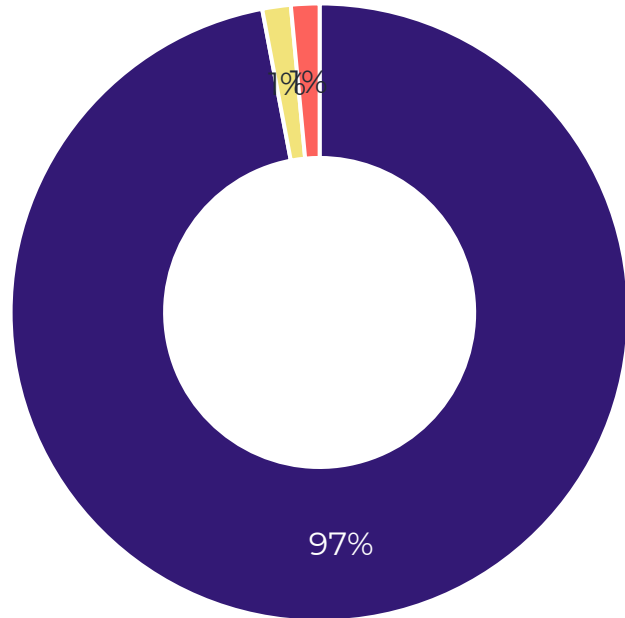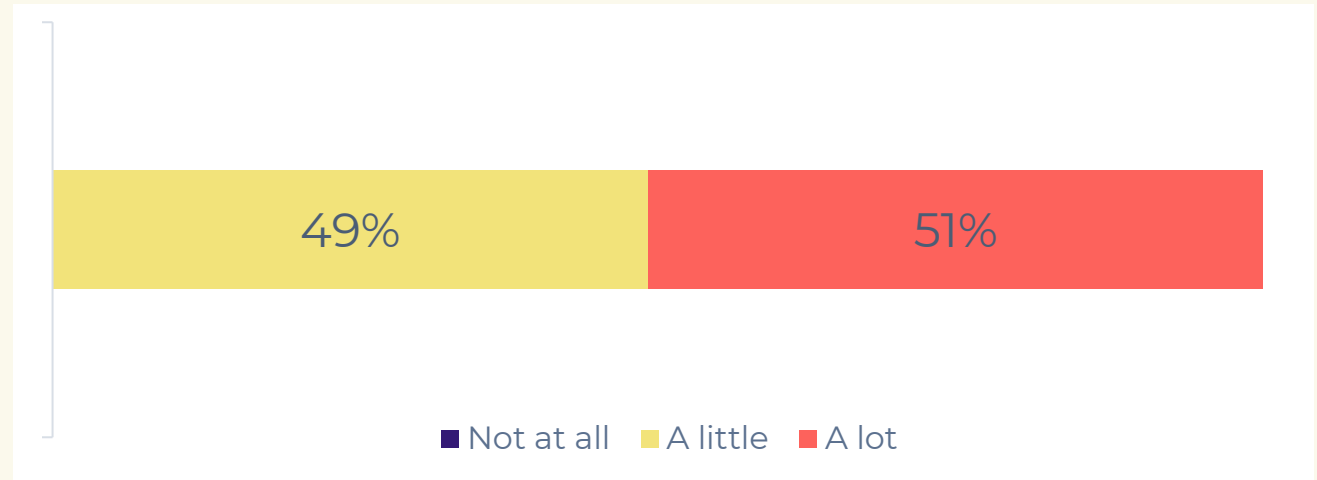
Are you actively implementing it?

Answered: 67   Skipped: 5

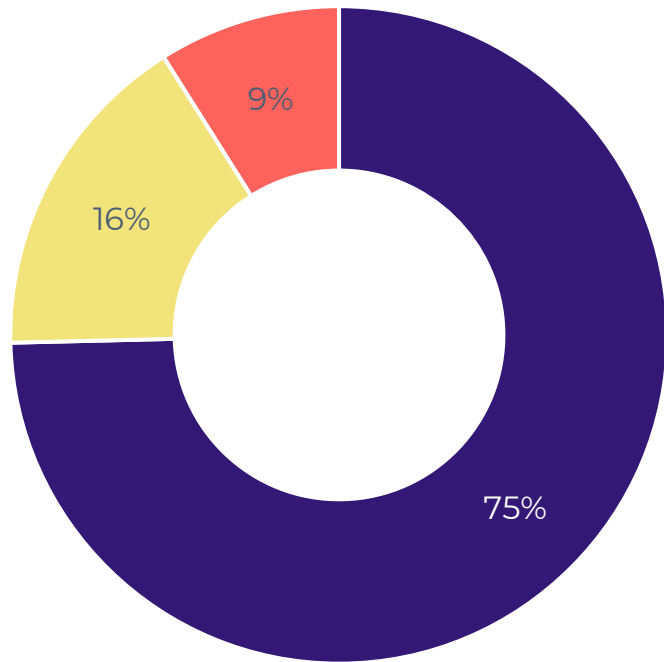Answered: 65   Skipped: 7

97%

■ Yes ■ No ■ Not sure

49%   51%

■ Not at all ■ A little ■ A lot

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

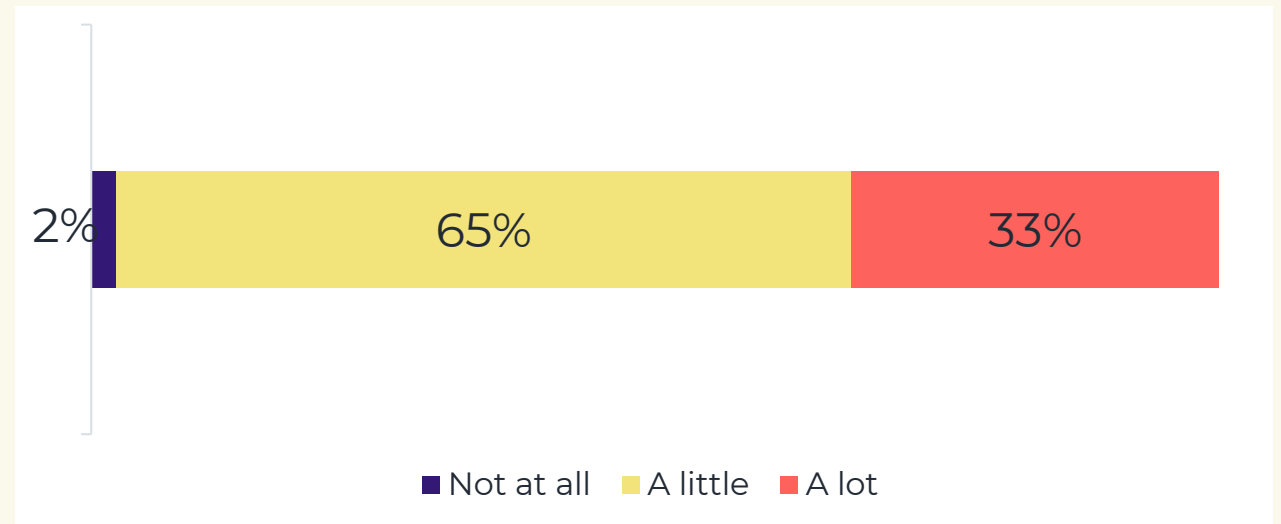Answered: 67   Skipped: 5

Legend: Yes (75%), No (16%), Not sure (9%)

Are you actively implementing your plan?

Answered: 46   Skipped: 26

2%   65%   33%

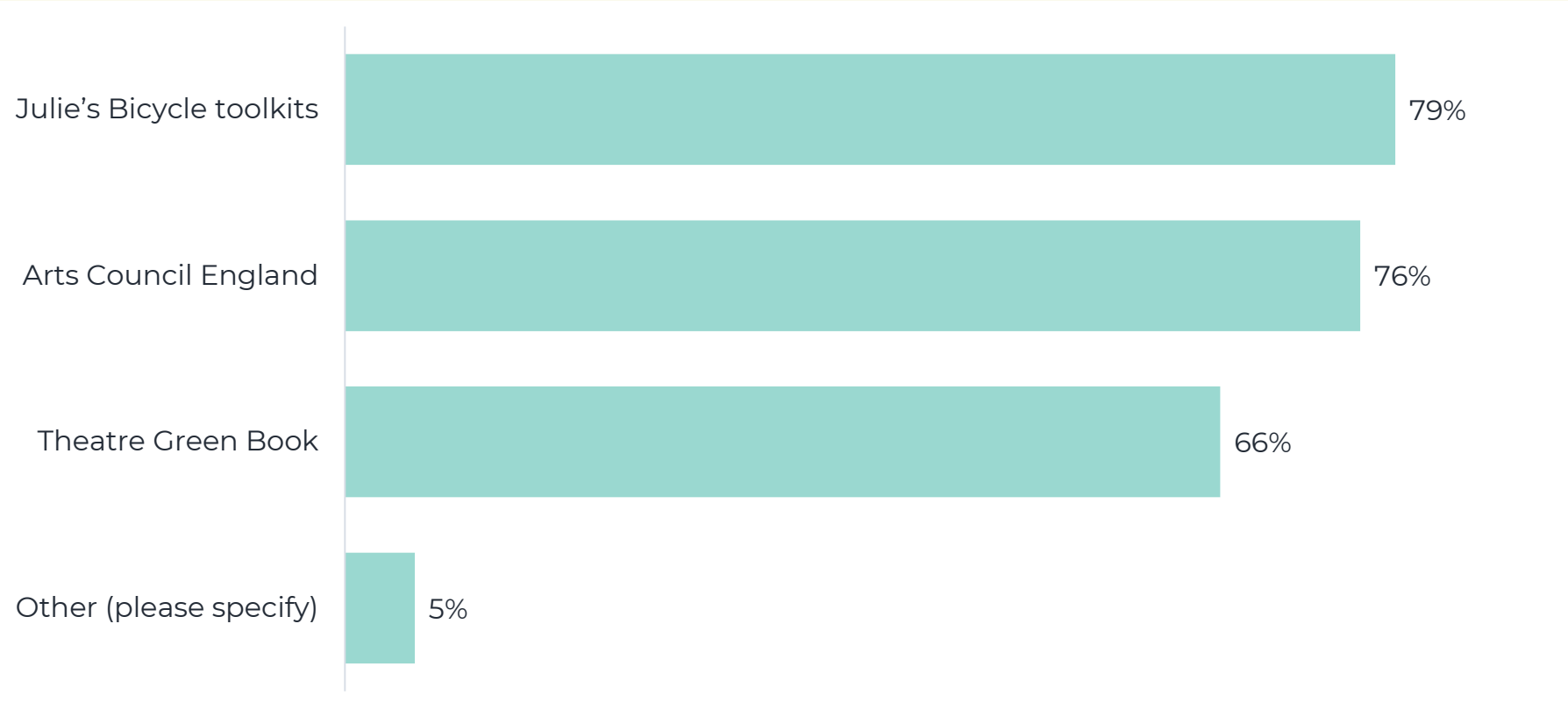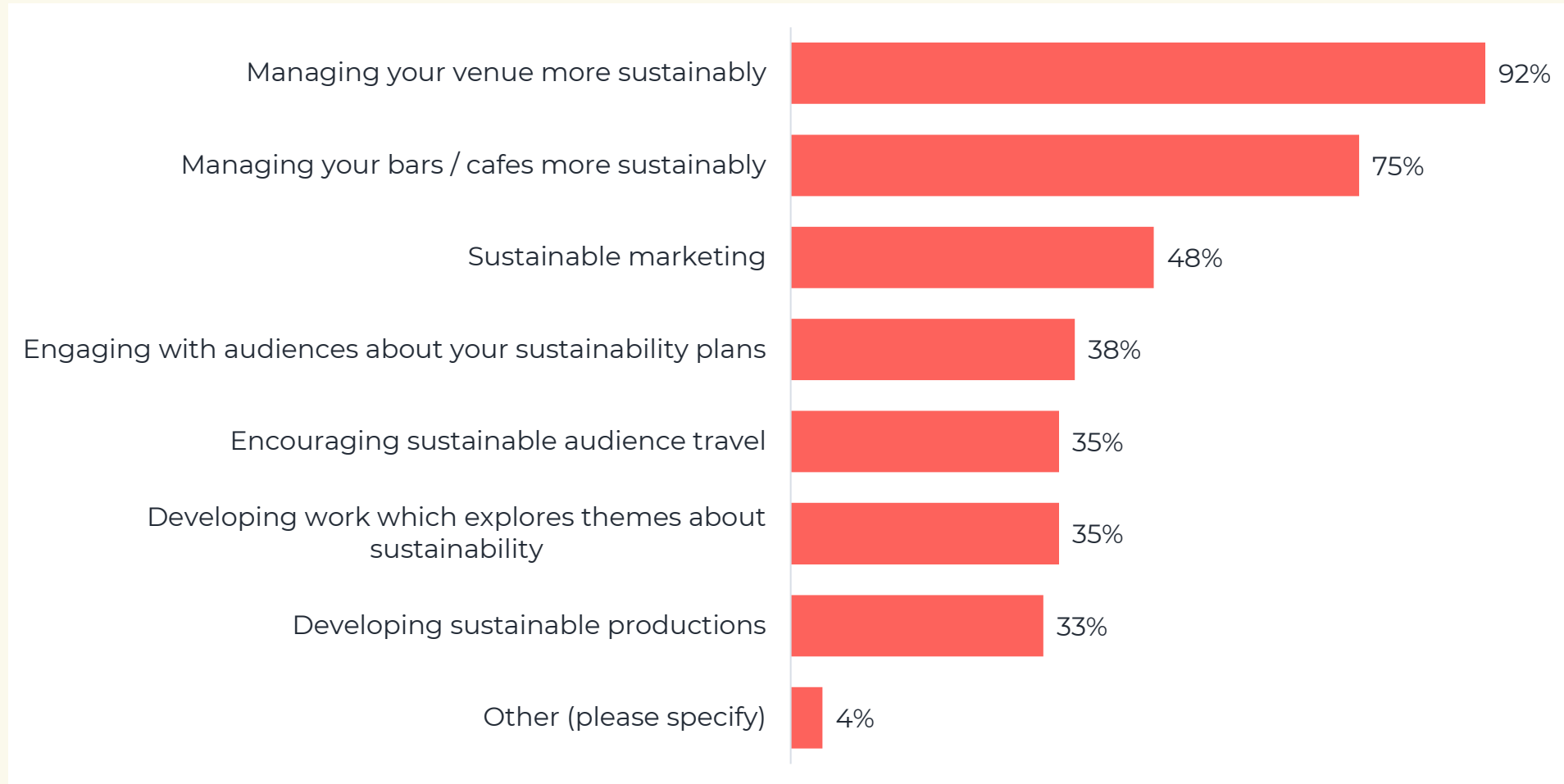Legend: Not at all, A little, A lot

Sustainability: Have you used any of the following to access information or inform your sustainability policy?
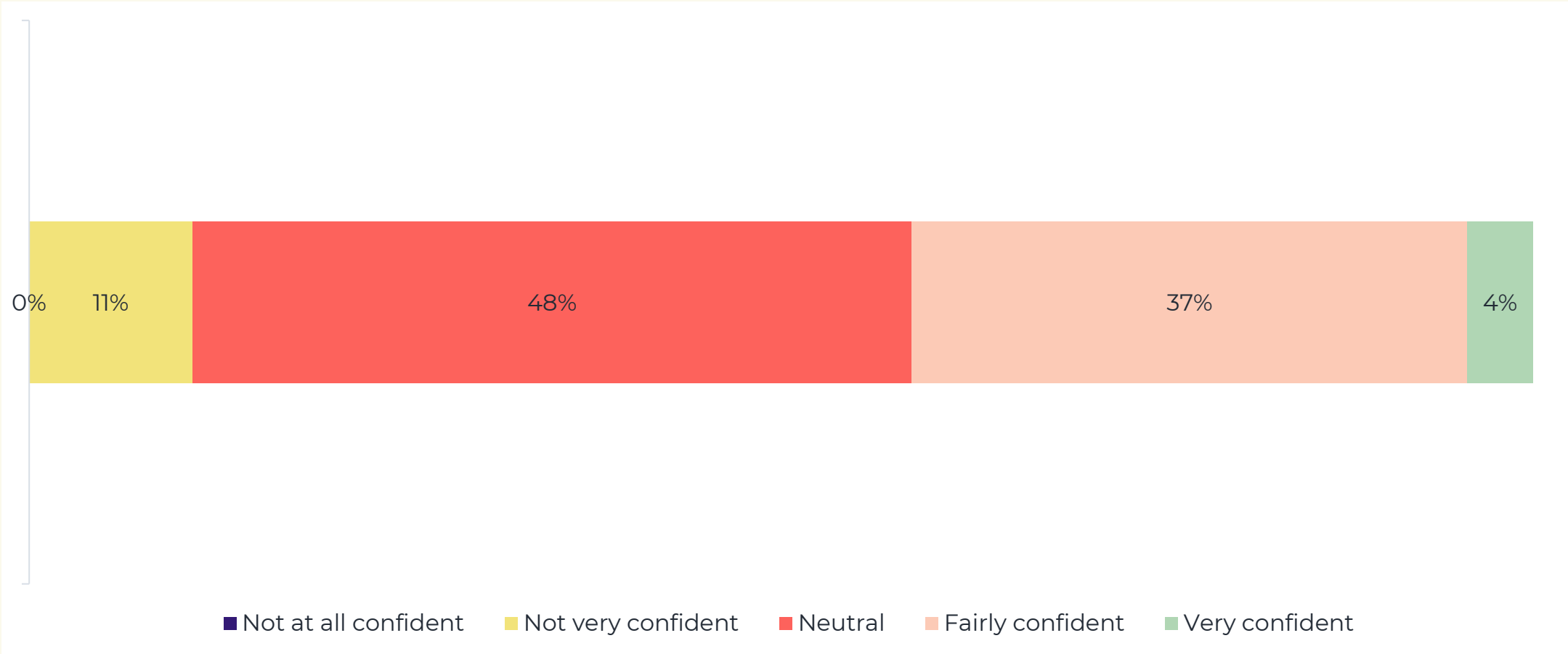
Answered: 38   Skipped: 34

Category	Percentage
Julie's Bicycle toolkits	79%
Arts Council England	76%
Theatre Green Book	66%
Other (please specify)	5%

Sustainability: Which of the following areas are you focusing on?

Answered: 48   Skipped: 24

Category	Percentage
Managing your venue more sustainably	92%
Managing your bars / cafes more sustainably	75%
Sustainable marketing	48%
Engaging with audiences about your sustainability plans	38%
Encouraging sustainable audience travel	35%
Developing work which explores themes about sustainability	35%
Developing sustainable productions	33%
Other (please specify)	4%

Sustainability: How confident do you feel about your ability to make a difference?

Answered: 46   Skipped: 26

| 0% | 11% | 48% | 37% | 4% |

■ Not at all confident   ■ Not very confident   ■ Neutral   ■ Fairly confident   ■ Very confident

Sustainability: What is stopping you from doing more in this area?

Answered: 64   Skipped: 8

Lack of staff capacity — 80%
Budget — 64%
Lack of staff knowledge or training — 34%
Not a priority for our organisation — 13%
Other (please specify) — 9%
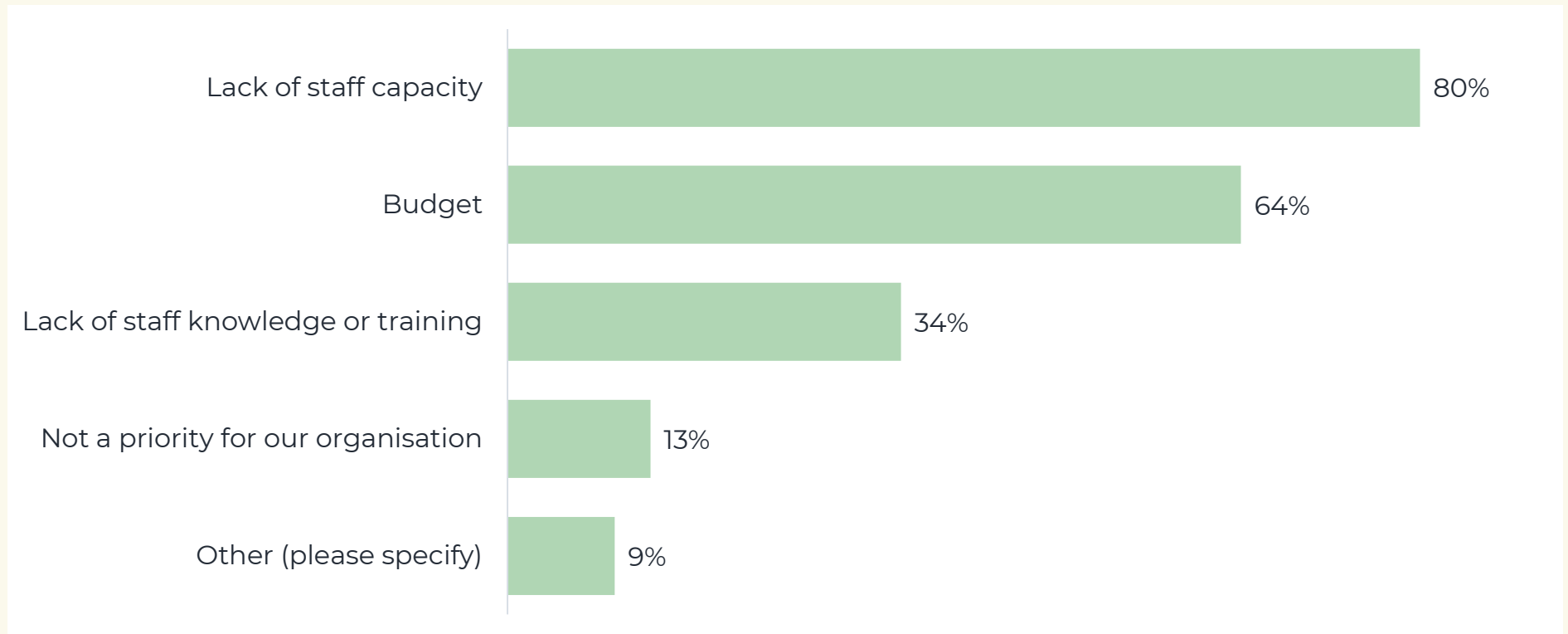
indigo

Any questions?

Flo Carr – Associate Director

flo.carr@indigo-ltd.com

Anastasia Starikova – Research and Data Executive

anastasia.starikova@indigo-ltd.com