the audience agency

National Classical Music Audiences

An analysis of Audience Finder box office data for classical music events 2014-2016

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Introduction

Audience Finder is the Arts Council England commissioned audience data and development programme, enabling cultural organisations to grow audiences and revenues by sharing, comparing and applying audience insight. The aggregated dataset provides a unique and hitherto unavailable level of audience analysis and benchmarking across the nation, regions, organisations, artforms and performances.

This report presents analysis of Audience Finder box office ticketing data for classical music events between April 2014 and March 2016.

An Audience Finder classical music cluster was set up in 2013-14 which agreed specific areas of focus. Those it has been possible to address in this report are:

- What are audiences like? Using Audience Spectrum segmentation.
    - How do tastes differ?
- What are the booking behaviours of classical music audiences?
    - How frequently do people book?
    - How much do people pay for their tickets?
    - How late do audiences book?
    - What are the trends in party size?
- Are audiences for classical music ageing?

Alongside box office data, a number of organisations chose to also run a survey, the results of which are being reported separately.

How to use this report

This report offers simple, straightforward metrics about the combined national audience for classical music. It can be used to:

- Benchmark your own audience characteristics
- Compare with regional data
- Inform your campaign in a particular place with audiences of a particular profile
- Inform choosing the right venue for the right product by looking at venues' background populations
- Inform how you plan the mix (from the offer to communications and lead times) for audiences with different profiles
- Describe the wider audience picture for classical music

For those contributing data, we would strongly encourage you to use the metrics in this report in conjunction with your own dashboard and other audience intelligence. If you would like help doing this, please call our free support line 020 3780 7282 or email audiencefinder@theaudienceagency.org

Source data

This report includes data from organisations beyond the original classical music cluster to include box office data from all classical music events in the Audience Finder system. This totals:

- 113 venues, orchestras or ensembles from across England.
- 6989 performances taking place between April 2014 and March 2016.

There are a few key omissions from the dataset for organisations which use an unsupported box office system. Technical developments are in progress which will ensure that those using unsupported source ticketing systems are able to input data into the Audience Finder programme in the future.

Performances in the Audience Finder system have been coded with a classical music genre code. This represents the primary genre of the programme. Codes are listed below with a description and the number of performances coded as each included in the dataset.

Genre code	Description	No. performances in dataset
Baroque	Concerts featuring Baroque programme, c. 1600-1750.	81
Children & Family Concerts	Concerts aimed at a family market.	510
Chamber & Recitals	Small scale chamber concerts, eg quartets, solo recitals.	2,518
Classical Choral	Concerts primarily featuring choirs/larger scale choral works. (May or may not be accompanied by an orchestra.)	338
Community/Amateur Music	Eg amateur orchestras, choirs and bands.	1,009
Contemporary Classical	Music by living composers. Where a concert programme mixed work of this type with earlier music, organisations were asked to make a call on what the primary focus and draw of the concert was and code accordingly.	323
Early Music	Music pre-1600.	203
Modern Classical Music	Generally, music written post 1945 (but not music by living composers - see above.) Where a concert programme mixes work of this type with earlier or later music, organisations were asked to make a call on what the primary focus and draw of the concert was and code accordingly.	39
Orchestral	Orchestral programmes primarily featuring works written from roughly 1750 to 1945. The category includes symphony and chamber orchestras. Due to the mixed nature of orchestral programmes, it is not possible to break this category down further for the box office coding.	1,344
Orchestral Non-Classical	Concerts where the programme is considered primarily non-classical eg songs from the shows.	50
Popular Classical	Popular classical programmes such as Last Night of the Proms, “classical favourites.”	245
Youth Music	Eg youth orchestras.	329
TOTAL PERFORMANCES		**6,989**

Summary of findings

All findings are from across the two year period from April 2014 – March 2016.

What are audiences like? Using Audience Spectrum

Audience Spectrum segmentation has been used extensively in this report. It segments the UK population by attendance, participation and engagement with arts and culture, reflecting different behaviours, attitudes and preferences towards arts and cultural products. The ten segments are divided into three groups – those with higher engagement in arts and culture, those with medium engagement and those with lower engagement:

Highly engaged – Metroculturals, Commuterland Culturebuffs, Experience Seekers

Medium engaged – Dormitory Dependables, Trips & Treats, Home & Heritage

Lower engaged – Up Our Street, Facebook Families, Kaleidoscope Creativity, Heydays

For full information please visit: theaudienceagency.org/audience-spectrum

For classical music audiences outside London, the dominant Audience Spectrum profiles are the highly engaged group Commuterland Culturebuffs, and the medium engaged Dormitory Dependables and Home & Heritage. Almost half of audiences outside London are from medium engaged Audience Spectrum segments.

In London almost three quarters of audiences are from highly engaged Audience Spectrum groups, with city-dwellers Metroculturals by far the most dominant group.

What are audiences like? How tastes differ

Outside London, Baroque, Chamber & Recital, Classical Choral and Early Music concerts attracted the highest proportions of the two most highly engaged Audience Spectrum groups – Metroculturals and Commuterland Culturebuffs.

The medium engaged Audience Spectrum segments Dormitory Dependables and Trips & Treats were most likely to book for popular or lower risk concerts outside London.

The third medium engaged segment, the older Home & Heritage, are avid attenders across all genres outside London apart from Children & Family Concerts and Youth Music.

Within London, audiences are dominated by Metroculturals across all genres, apart from Orchestral Non-Classical and Popular Classical. Metroculturals are significantly less likely to attend these more popular genres. However Orchestral Non-Classical and Popular Classical are among the genres that Commuterland Culturebuffs are most likely to attend in London.

In terms of crossover between genres, a high proportion Baroque, Classical Choral, Chamber & Recitals and Early Music bookers also booked for Orchestral concerts. Baroque bookers were also particularly likely to attend Classical Choral concerts.

There is low crossover between Children & Family and Popular Classical bookers and most other genres.

Booking behaviours: How frequently do people book?

By far the highest proportion of classical music bookers (67%) booked just once over the two year period across all the classical concerts in the dataset. A quarter booked two to five times and 8% were very frequent attenders, booking six or more times over the two year period across all classical concerts in the dataset.

Overall, the average booker frequency was 2.31 times for any classical concert in the dataset over the two year period.

Booking behaviours: How much do people pay for their tickets?

The overall national average ticket yield for classical music was £18.96. Average ticket yield is higher in London at £20.26 than outside at £18.01.

Ticket yield was highest by a significant amount for Popular Classical concerts at £30.09.

One time attenders across the two years had the lowest average ticket yield and those attending two to five times had the highest.

Average overall customer value for classical music was £101.69 across the two years – across any performance in the dataset.

Individual customer value was highest for Orchestral programmes and Chamber & Recitals, attributable to higher frequency, and Popular Classical, attributable higher ticket yield.

Customer value was lowest for Children & Family Concerts, Community/Amateur and Youth Music, reflecting both the lower ticket yield and booker frequency for these genres.

Booking behaviours: How late do audiences book?

By far the highest proportion of audiences (35%) booked over 90 days in advance. This differs significantly from the overall Audience Finder cross artform benchmark: in both 2014-15 and 2015-16 just 23% of audiences booked this far in advance.

On the day bookings for classical music, at 11%, were lower than the overall Audience Finder benchmark where they represented 16% of bookings in 2014-15 and 15% of bookings in 2015-16.

There is very little difference in booking lead time for classical music audiences in and out of London.

Higher proportions of Metroculturals and Experience Seekers booked closer to the event for classical music, but this trend is reversed for Commuterland Cuturebuffs who were more likely to book further in advance. Home & Heritage in particular were more likely to book over 90 days in advance.

Dormitory Dependables and Trips & Treats were less likely to book over 90 days in advance.

Booking behaviours: What are the trends in party size?

The overall national average party size was 2.55 people. This was slightly higher outside London at 2.68 people than in London at 2.38.

Children & Family Concerts attracted the largest party sizes at an average of 5.2 people. Also significantly higher than the overall average were Youth Music at 4.2 and Community/Amateur Music at 3.8.

The lowest average party sizes were for Baroque, Chamber & Recitals and Early Music at 2.1 people.

Are audiences for classical music ageing?

Age proxies have been created to estimate the age of classical music audiences. These have been calculated using the Audience Spectrum breakdown of classical music audiences and the age breakdown at national level within each segment.

The modelled age breakdown suggests that classical music audiences nationally are much more likely to be in middle and older age groups. 42% of are likely to be aged 41 – 60 and 37% aged over 61. Just 7% are likely to be aged under 31.

The modelled age for audiences outside Greater London suggests an older leaning than the national estimate. 40% are likely to be aged over 61 and a lower proportion, 18%, aged under 40.

In Greater London, the estimate suggests that audiences are more likely to be aged 26-40 and 51-60 than elsewhere. 30%, as compared to 40% outside London, are likely to be aged over 61.

These differences reflect differences in the population age profile. Just 16% of the London population is aged 60+ compared to 24% outside London. (Source: Census 2011)

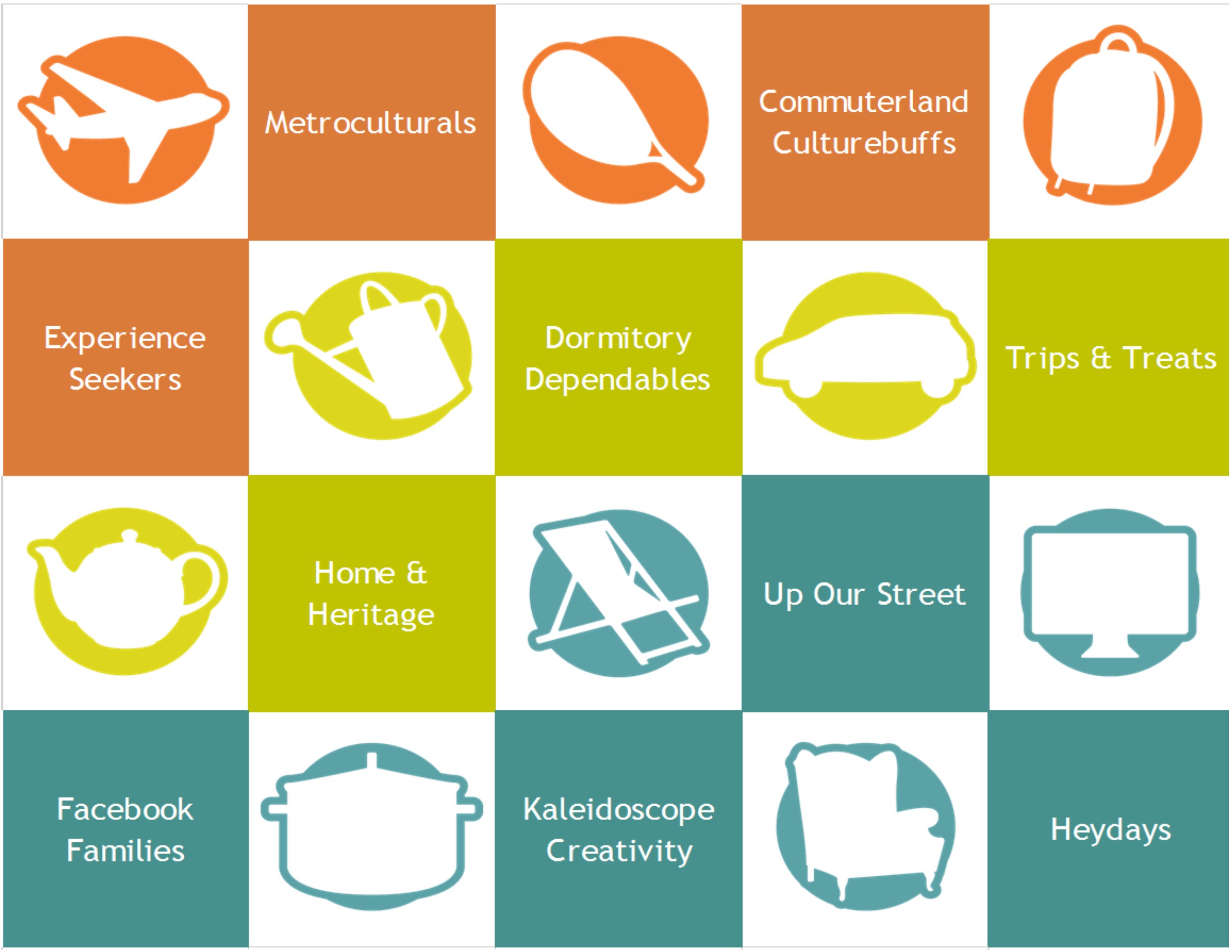
For comparative purposes, modelled age profiles were also created for other traditional artforms: classical play, opera and traditional ballet. Apart from a slightly higher proportion of classical music audiences estimated to be aged 71+, the profiles follow an almost identical pattern for each of these classical art forms, suggesting that older audiences are not a phenomenon restricted to classical music.

What are audiences like?

Audience Spectrum Profiling

Audience Spectrum segments the UK population by attendance, participation and engagement with arts and culture, reflecting different behaviours, attitudes and preferences towards arts and cultural products. Audience Spectrum profiles the population at household and postcode levels and is the most accurate tool the sector has ever had to help describe the population by their cultural attitudes and behaviours. As well as helping us understand the people who do and don't engage with our work, it is also a powerful tool for targeting audiences. For more information and full pen portraits for each of the ten segments visit theaudienceagency.org/audience-spectrum

Audience Spectrum groups are ranked by engagement with arts and culture, from the highest engaged Metroculturals ranked as one through the lowest engaged Heydays at 10. On the diagram below, the highly engaged groups are orange, the medium engaged groups are green and the lower engaged groups are blue.



The London effect

Within London, the population is dominated by three groups: the highly culturally engaged Metroculturals (26% of households) and Experience Seekers (17%), and the lower engaged Kaleidoscope Creativity (32%).

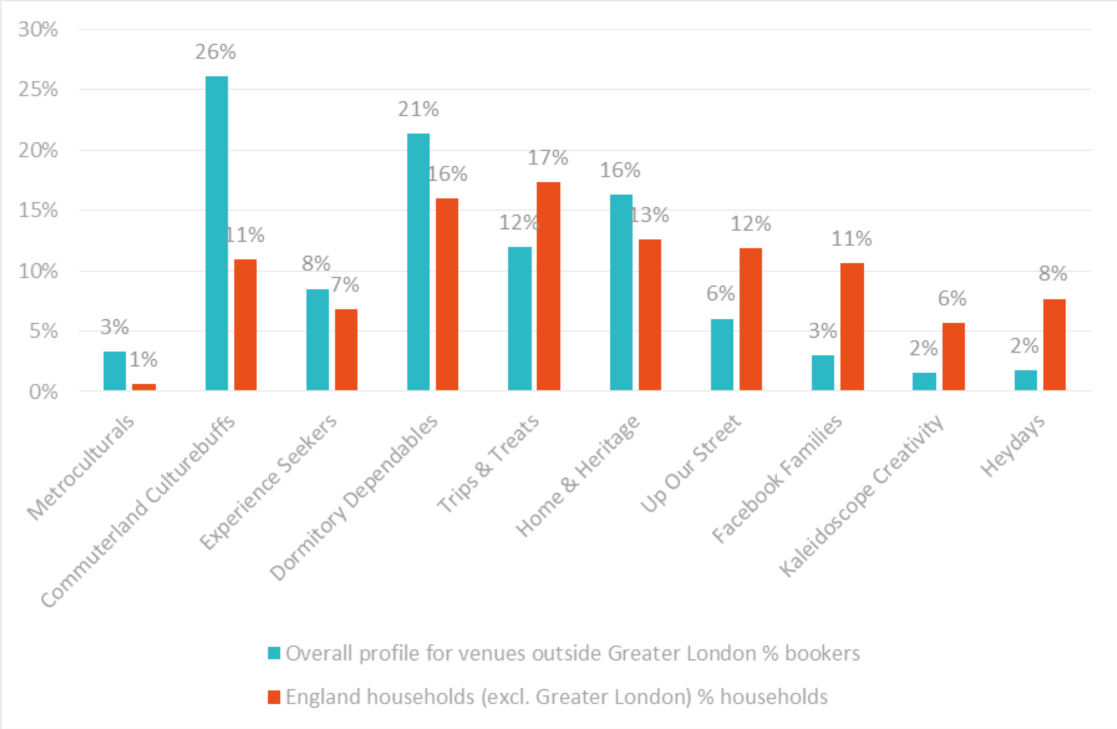
In England outside London, the population is very different with the three medium culturally engaged Audience Spectrum segments dominant: Dormitory Dependables (16% of households), Trips & Treats (17%) and Home & Heritage (13%). Metroculturals only make up 1% of households outside London and Kaleidoscope Creativity only 6%.

In this report Audience Spectrum profiles, along with some other findings, are therefore presented separately for in and out of London to ensure a more useful and insightful understanding of classical music audiences.

Very different audience and population profiles mean that organisations working in and out of London are facing a number of differing opportunities and challenges. These have significant implications in areas such as managing expectations and those of funders, understanding which organisations are relevant to benchmark against, and planning tours and collaborations.

Overall Audience Spectrum Profile - Outside Greater London 2014-16

The chart below shows the percentage of classical music bookers in each Audience Spectrum segment outside Greater London, compared to the percentage of households in England (excluding Greater London) in each segment.



37% of classical music audiences outside Greater London were from **highly** engaged groups:

- 3% Metroculturals (1% of households)
- 26% Commuterland Culturebuffs (11%)
- 8% Experience Seekers (7%)

49% from **medium** engaged groups:

- 21% Dormitory Dependables (16%)
- 12% Trips & Treats (17%)
- 16% Home & Heritage (13%)

7% from **lower** engaged groups:

- 6% Up Our Street (12%)
- 3% Facebook Families (11%)
- 2% Kaleidoscope Creativity (6%)
- 2% Heydays (8%)

Particularly notable here is the very high proportion of Commuterland Culturebuffs, as well as audiences from the medium engaged Audience Spectrum groups. The latter differs greatly from the Greater London profile as discussed in the next section, reflecting the different challenges and opportunities presented by very different population profiles.

Commuterland Culturebuffs, as well as being the largest group among classical music audiences outside Greater London, are significantly overrepresented among audiences at 26% compared to overall households at 11%. This highly engaged group are keen consumers of culture with broad tastes, but lean towards heritage and more classical offerings. They can afford to attend regularly and will pay premium prices for quality experiences.

The second largest group is the medium engaged **Dormitory Dependables.** Culture is more of a treat or family/social outing than part of their everyday lifestyle. Most live in suburban or small towns and are made up of older families and singles with many households with children. Lack of easy access to cultural product is often a significant barrier.

Also significant are the medium engaged **Home & Heritage.** This older segment (97% are aged over 61) are conservative and traditional in their tastes. They tend to live outside major towns and cities and in rural areas across the UK. The segment have very low digital engagement.

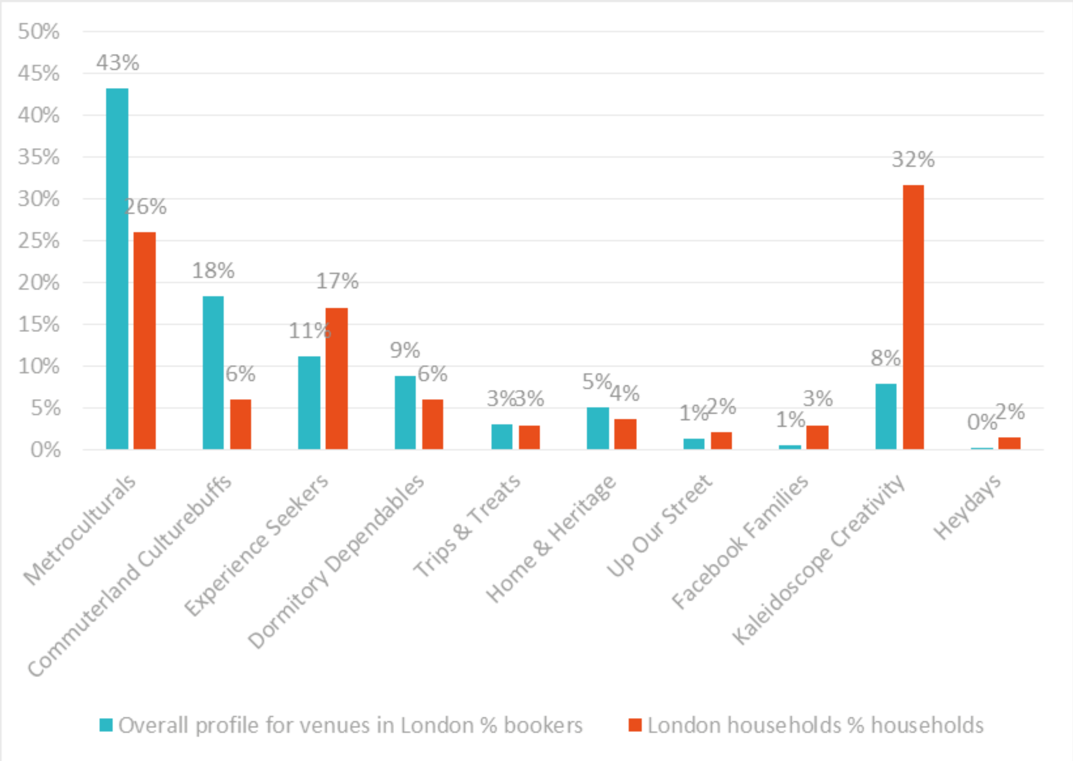
The highest engaged segment **Metroculturals**, despite only making up 1% of the population account for 3% of classical music audiences outside London. Metroculturals choose a city lifestyle for the broad range of cultural opportunities it offers. Passionate about arts and culture, they are interested in a wide spectrum of cultural activity and confident and knowledgeable about their preferences. This group is likely to make up a small but core audience for classical music organisations in cities and towns including Bristol, Bath, Manchester, Birmingham, Oxford, Cambridge, Brighton and Bournemouth.

Experience Seekers represent 8% of audiences, slightly higher than their presence in the population at 7%. These recent graduates and early/mid-career professionals are one of the youngest Audience Spectrum groups. They seek new experiences to support their active social lives and are open to a wide range of mainstream and alternative cultural offers. There may be opportunities to develop the attendance of this group further with the right product and communication.

All four of the lower engaged Audience Spectrum groups – **Up Our Street, Facebook Families, Kaleidoscope Creativity** and **Heydays** – appear in very low proportions among classical music audiences outside London. Strategies to increase attendance from these groups are likely to require a focus on outreach activity, low cost and product which meets specific needs within each group.

Overall Audience Spectrum Profile - Greater London 2014-16

The chart below shows the percentage of classical music bookers in Greater London in each Audience Spectrum segment, compared to the percentage of households in London in each segment.



72% of classical music audiences in Greater London were from **highly** engaged groups

- 43% Metroculturals (26% of Greater London households)
- 18% Commuterland Culturebuffs (6%)
- 11% Experience Seekers (17%)

17% from **medium** engaged groups:

- 9% Dormitory Dependables (6%)
- 3% Trips & Treats (3%)
- 5% Home & Heritage (4%)

10% from **lower** engaged groups:

- 1% Up Our Street (2%)
- 1% Facebook Families (3%)
- 8% Kaleidoscope Creativity (32%)
- 0% Heydays (2%)

The Greater London profile shows a far greater proportion of highly engaged segments at 72%, in particular **Metroculturals** who make up 42% of classical music audiences. Metroculturals make up a very high proportion of the population in London at 26% of households (compared to just 1% in the rest of the country) and, at 42%, are overrepresented among classical music audiences compared to the population.

Metroculturals choose a city lifestyle for the broad range of arts and culture. They are passionate about arts and culture, interested in a wide spectrum of cultural activity, and confident and knowledgeable in their preferences. Diverse in age and background, they are unified by their high levels of education, well paid jobs, liberal outlook and active lifestyles.

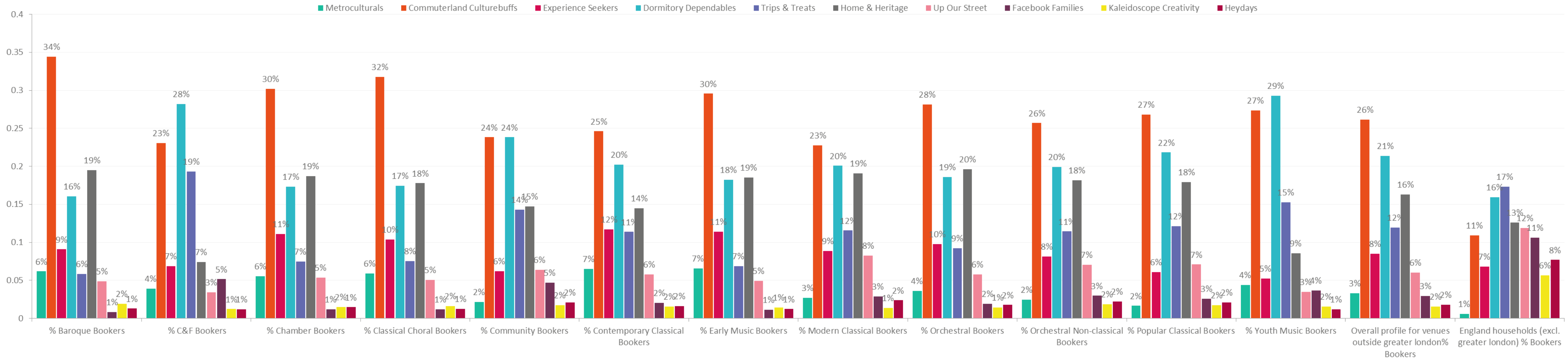
Commuterland Culturebuffs are also significant as the second largest group and appear in much high proportions than they do in the London population, where they make up just 6% of households.

Although classical music events in Greater London attract a higher proportion of **Experience Seekers** than those outside London at 11%, that percentage is still low compared with the London population, in which they represent 17% of households. Experience Seekers are one of the youngest groups in the spectrum, and in particular of the three higher engaged groups. They are made up of recent graduates and early/mid-career professionals and are open to a wide range of mainstream and alternative offers. Their low representation in the dataset is one of the most significant factors suggesting that classical music audiences are not just older, but ageing.

As outside London, the lower engaged Audience Spectrum groups appear in very low proportions among classical music audiences. Strategies to increase attendance of lower engaged groups in London would need to focus on Kaleidoscope Creativity, who are the largest group in the London population, making up 32% of households.

How do tastes differ? Audience Spectrum Profiles by genre 2014-16

Outside Greater London



The Audience Spectrum profiles for each classical music genre from outside Greater London show some particularly interesting findings.

It is worth noting that Metroculturals, although they make up a small proportion of overall audiences reflecting their very low presence in the general population outside London, are more likely to book for Baroque, Chamber & Recital, Classical Choral, Contemporary Classical and Early Music concerts than for other types of programme.

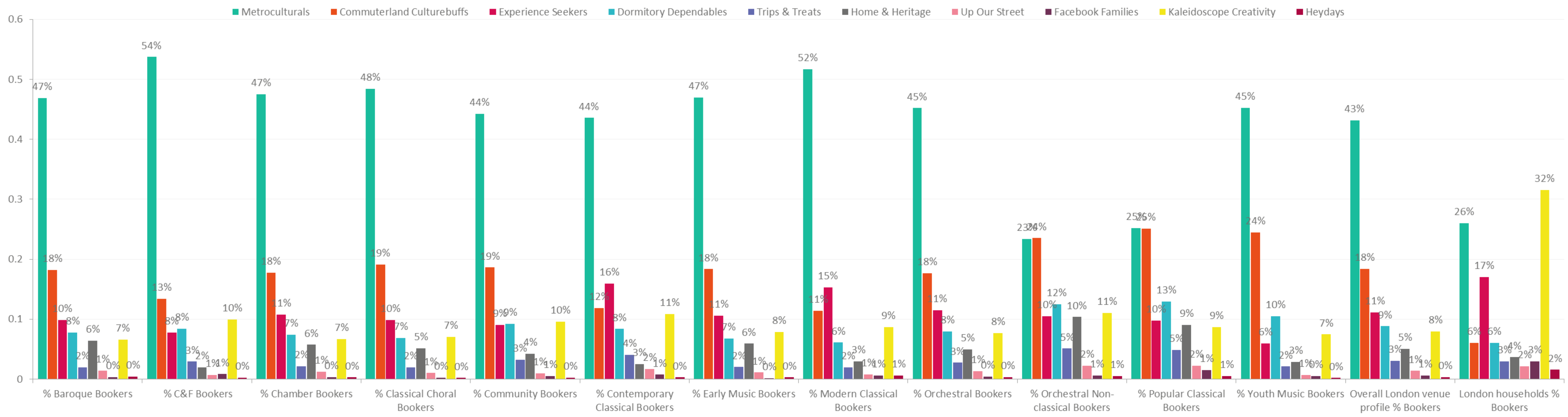
Commuterland Culturebuffs are high across all artforms and appear in the highest proportions in four out of the five same artforms as Metroculturals - Baroque, Chamber & Recital and Classical Choral and Early Music. Baroque programmes attracted the highest proportion of bookers from highly engaged Audience Spectrum groups overall.

Children & Family Concerts attracted the highest proportion from medium engaged groups, in particular Dormitory Dependables and Trips & Treats which both include a high proportion of families with dependent children. Trips & Treats are much less likely than average to attend classical music, however these results demonstrate that, despite this, it is possible to engage the group with classical music as a family unit, raising questions about the opportunities to keep them engaged over the longer term.

Dormitory Dependables make up a sizeable proportion of audiences across all classical music genres, but are most highly engaged with the lower risk offerings in the Children & Family, Community, Youth Music and Popular Classical concerts. Also in the medium engaged group, Home & Heritage are a particularly important segment for classical music and these results show a wide range of appeal across all programme types, except for Children & Family and Youth Music.

The younger Experience Seekers show slightly more propensity to attend Contemporary Classical, Chamber & Recitals and Early Music offers than other genres.

Greater London

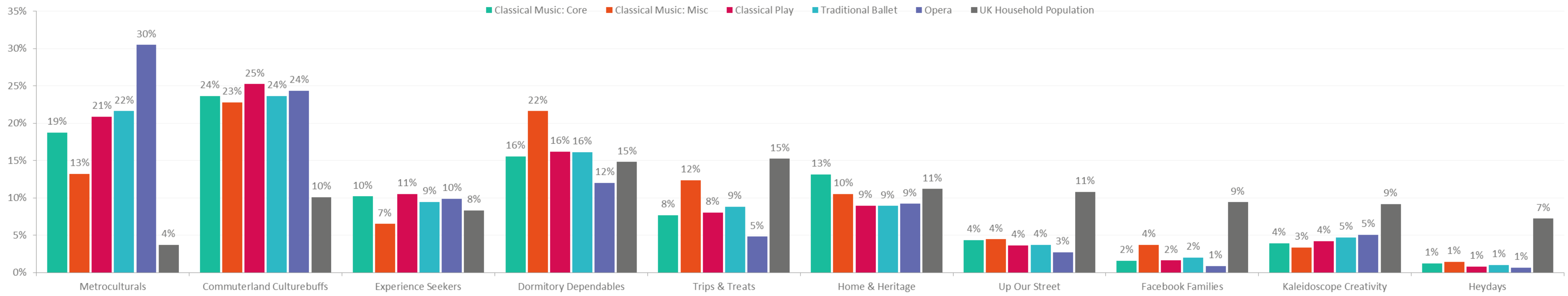


In London, bookings by Metroculturals are high across all genres except for Orchestral Non-Classical and Popular Classical programmes, where they are underrepresented compared to the London population (they make up 26% of the population). The attendance patterns of Metroculturals suggest that they are attracted to a very wide range of classical music events, but are put off by more 'popular' offers. More than a fifth of the segment have children in the household and although this is lower than some other Audience Spectrum groups, high attendance by Metroculturals at Children & Family, Youth Music and Community events suggests that, as well as attending with adults, they are also motivated to attend with and support family and friends.

Commuterland Culturebuffs are one of the largest groups across all classical music genres in London and, despite only making up 6% of the population in London, they are appearing in much higher proportions than this across the profiles. Differing from the profiles outside London, they appear in the highest proportions among bookers for the lower risk offerings in Orchestral Non-Classical, Popular Classical and Youth Music.

The younger Experience Seekers are most attracted to Contemporary Classical and Modern Classical programmes in London. Despite being a generally highly arts engaged segment, they are underrepresented at all other classical music genres in London compared to their presence in the London population (17%).

How do tastes differ? Classical Music Audience Spectrum profiles compared to other artforms 2014-16



The chart shows the attendance of each Audience Spectrum group across a range of artforms:

- Classical Music: Core – classical music codes minus Children/Family concerts, Youth Music and Community/Amateur Music.
- Classical Music: Misc - Children/Family concerts, Youth Music and Community/Amateur Music.
- Classical Play
- Traditional Ballet
- Opera
- Compared to the proportion of households in each segment in the overall UK population

Metroculturals make up a higher proportion of opera audiences than any other of these artforms, while Commuterland Culturebuffs make up a similar proportion of audiences across all the artforms shown. The medium engaged Dormitory Dependables and Trips & Treats segments were more attracted to Classical Music: Misc (Children/Family concerts, Youth Music and Community/Amateur Music) than other artforms.

Experience Seekers are one of the highest engaged Audience Spectrum segments overall, and for some artforms they are significantly overrepresented. It is noticeable that they are relatively sparse in the datasets for all these more traditional artforms. Combined with other data, we believe that this may suggest that audiences for all are ageing and this is not a matter restricted to classical music.

As established earlier, Home & Heritage are an important audience group for classical music and, as seen here, the segment are attending Classical Music: Core in higher proportions than any of the other artforms. It is important to recognise that lack of easy access to a nearby cultural infrastructure is a significant barrier for this older group.

Engagement from all four of the lower engaged Audience Spectrum segments – Up Our Street, Facebook Families, Kaleidoscope Creativity and Heydays – is low across all artforms. The fact that there are significantly higher levels of attendance from the mid-engaged Audience Spectrum groups at more accessible product (family and popular) strongly supports the idea that any specific intentions to engage these groups should concentrate on such offers. However for lower engaged groups, addressing what are likely to be significant barriers around price, lack of awareness, perceptions and accessibility will also be important.

How do tastes differ? Crossover by genre

A crossover table is included in the Appendix of this report and looks at audience crossover between genres.

The most significant crossovers can be seen in Baroque (44%), Classical Choral (37%), Chamber & Recitals (34%) and Early Music (30%) bookers attending Orchestral programmes. A high proportion of Baroque bookers (28%) also attend Classical Choral concerts.

In terms of the number rather than proportion of bookers, the largest crossovers can be seen between Orchestral and Chamber & Recitals (12,431 bookers), Orchestral and Classical Choral (9,763 bookers), Orchestral and Popular Classical (6,429 bookers) and Orchestral and Contemporary Classical (4,139 bookers).

There is a particularly low proportion of Children & Family bookers attending most other genres. This is not surprising given the life stage these bookers are likely to be at, however it does raise questions about how the sector can keep families and their children engaged in the longer term.

Also notably low is the proportion of Popular Classical bookers attending other genres, fitting with their lower frequency at the genre itself. We can see from the high ticket yield for this genre that bookers are willing to pay high prices for a concert they want to hear, but the challenge appears to be attracting them to less ‘popular’ genres.

Booking behaviours

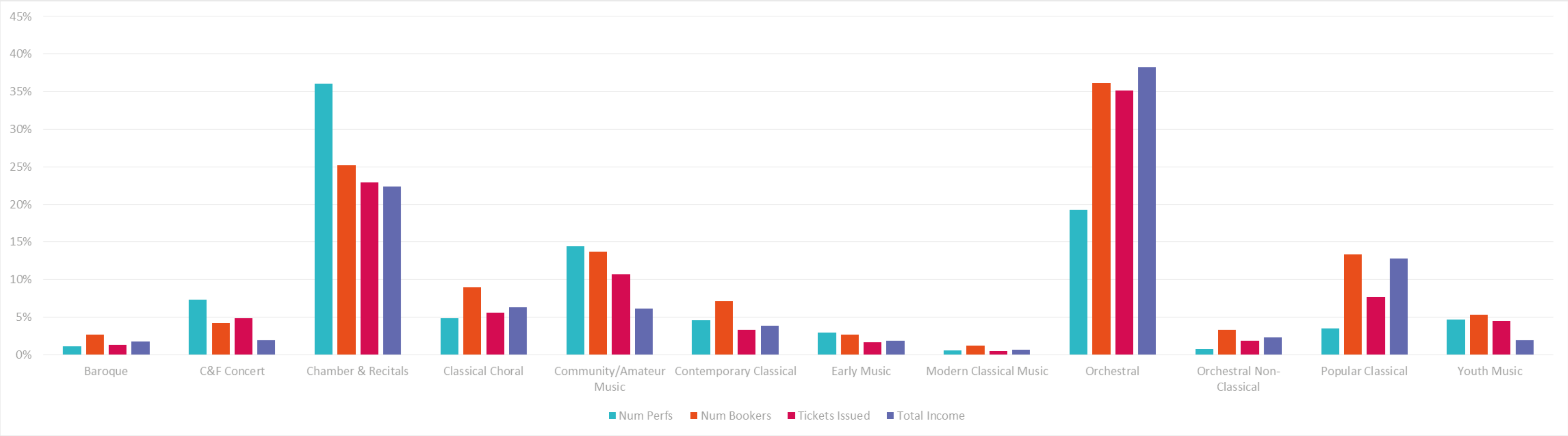
Data used: Performances, tickets and income

The table and chart below show the overall number of performances, bookers, tickets and income for each programme genre included in this report. This is over the two year period of the report from April 2014 to March 2016.

Primary Artform	Num Perfs	Num Bookers	Tickets Issued	Total Income	
Baroque	81	13,478	39,751	£	885,267.19
C&F Concert	510	21,339	143,753	£	993,479.59
Chamber & Recitals	2,518	126,816	681,551	£	11,453,964.35
Classical Choral	338	45,178	166,901	£	3,225,832.28
Community/Amateur Music	1,009	69,081	318,844	£	3,129,001.44
Contemporary Classical	323	35,990	98,223	£	1,955,183.30
Early Music	203	13,650	49,646	£	932,361.89
Modern Classical Music	39	5,921	15,442	£	336,878.21
Orchestral	1,344	181,905	1,045,553	£	19,575,319.62
Orchestral Non-Classical	50	16,815	54,057	£	1,163,981.33
Popular Classical	245	67,048	229,717	£	6,556,064.38
Youth Music	329	26,756	133,743	£	998,310.37
Grand Total	**6,989**	**503,566**	**2,977,181**	**£**	**51,205,643.95**

40% of these performances took place in London and 60% outside London.

Chamber & Recitals were particularly dominant in London (1,504 performances compared to 1,014 outside). Dominant outside London were Community/Amateur Music (904 performances outside London/107 in London), Early Music (166 outside London/37 in London), Orchestral (955/389) and Popular Classical (210/35).



The highest number of performances by far were in the Chamber & Recitals category at 2,518. This category does not however account for the highest number of bookers, tickets issued nor total income. This may be because chamber music and recitals take place in venues with smaller capacity and ticket prices tend to be lower than for some other genres. Lower individual booker numbers are also influenced by increased frequency among bookers for Chamber & Recitals compared to other genres, as presented later.

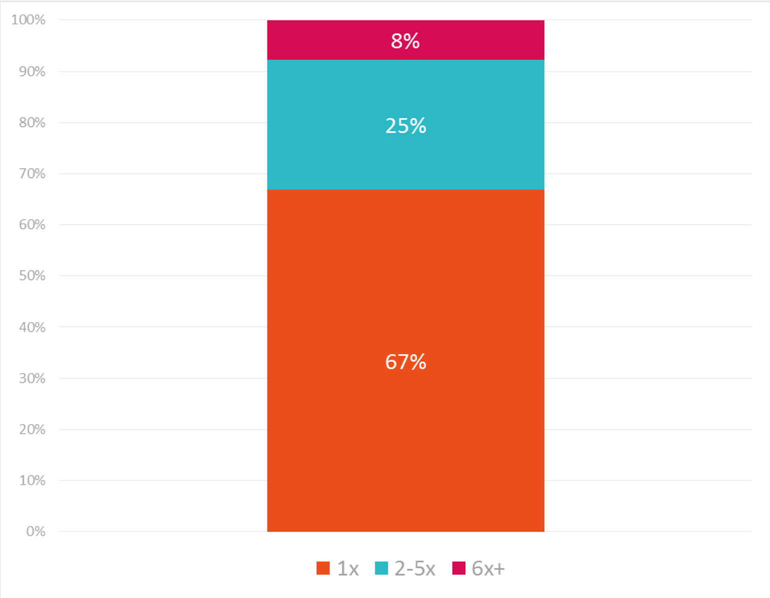
Orchestral performances account for the highest numbers of bookers, tickets issued and overall income.

For Popular Classical concerts in particular, the chart shows high income relative to the number of performances and tickets issue, ie high ticket yield. The high numbers of individual bookers compared to concerts, tickets and income is also clear, reflecting the lower frequency of Popular Classical bookers.

How frequently do people book?

Frequency of classical music bookers 2014-16

The chart below shows the frequency of unique bookers across all classical concerts in the dataset (based on a subset of data for bookers who can be tracked across organisations in Audience Finder).



By far the highest proportion of classical music bookers (67%) booked just once over the two year period. 8% are very frequent attenders of classical music, booking six or more times over the two year period. A high proportion of these may be subscribers.

Average ticket yield by frequency 2014-16

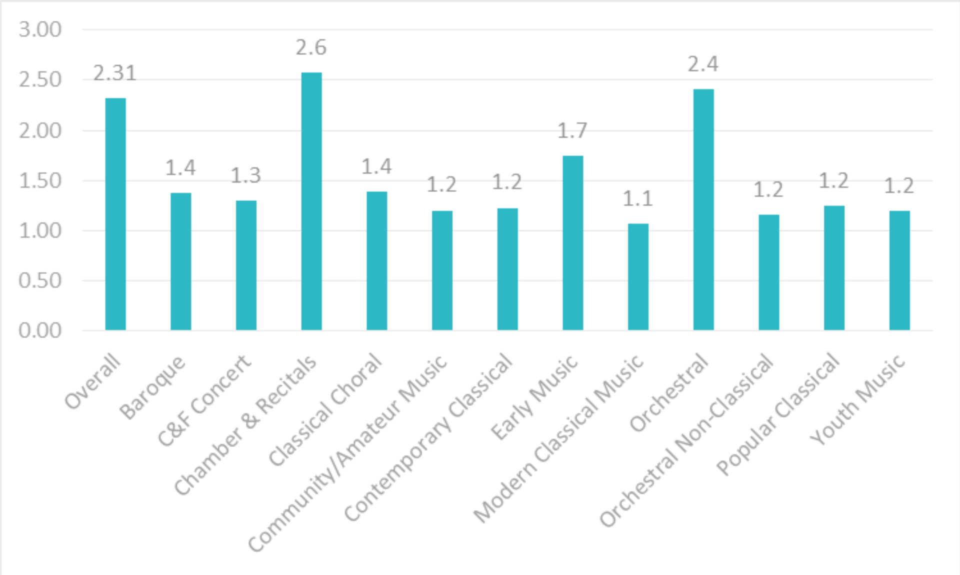
Booker frequency	Average Ticket yield (excl. zero value sales)
1x	£ 19.41
2-5x	£ 20.55
6x+	£ 20.38

This table sets out average ticket yield for people who booked one, two to five and six or more times (based on a subset of data for bookers who can be tracked across organisations in Audience Finder). It is notable that ticket yield is lowest for those who only booked once, suggesting that lower prices may be necessary in order to attract first time and infrequent attenders.

Ticket yield is lower for those booking six or more times than for those booking two to five times. This may in part be due to subscription discounts enjoyed by some of the most frequent bookers.

Average booker frequency overall and by genre 2014-16

The chart below shows the frequency of unique bookers across all classical concerts in the dataset.



Overall, the average booker frequency was 2.31 times for any classical concert in the dataset over the two year period.

For each individual genre, the data relates to frequency of attendance just within that genre, ie Baroque bookers attended Baroque concerts an average of 1.4 times over the two year period.

Frequency was highest among Chamber & Recital (2.6 times) and Orchestral (2.4 times) bookers, likely influenced by the higher number of concerts in these genres taking place.

Modern Classical Music (1.1 times) and Community/Amateur, Contemporary Classical, Orchestral Non-Classical, Popular Classical and Youth Music (1.2 times) bookers all experienced the lowest average booker frequency at that genre during the two year period.

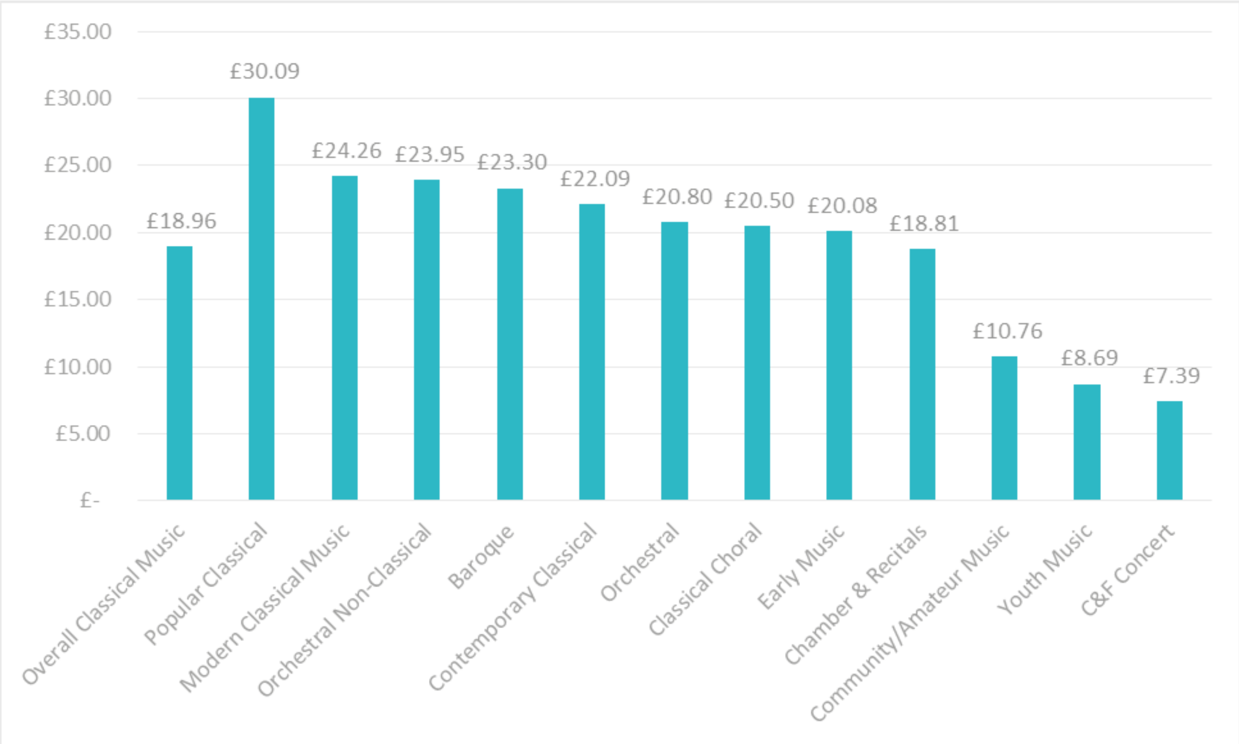
Low frequency among Modern Classical and Orchestral Non-Classical attenders may relate to the particularly low number of Modern Classical (39) and Orchestral Non-Classical (50) performances in the dataset. The low frequency for Community/Amateur Music is notable since this is one of larger genres, with 1,009 concerts in the dataset.

How much do people pay for their tickets?

To address this question we have looked at average ticket yield overall and by genre, average overall customer value (2014-16, across performances in the dataset), and average customer value for each genre (2014-16, across performances in the dataset).

Average ticket yield overall and by genre 2014-16

The chart below shows average ticket yields (excluding tickets coded as comps).



The overall national average ticket yield for classical music was £18.96.

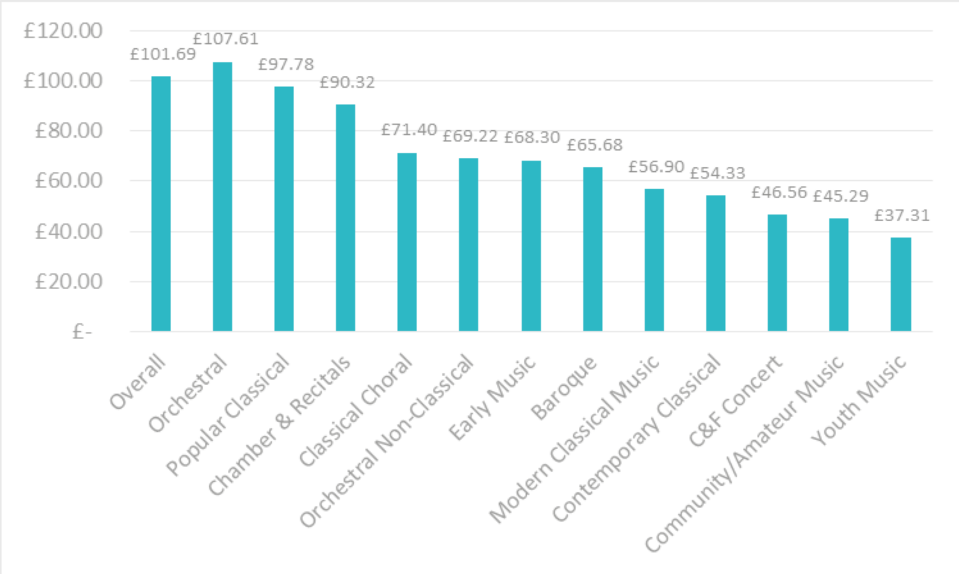
Average ticket yield is higher in London at £20.26 than outside at £18.01.

Ticket yield was highest by a significant amount for Popular Classical concerts at £30.09, almost £6 more than the second highest ticket yield for Modern Classical Music at £24.26.

Community/Amateur Music, Children & Family Concerts and Youth Music all had much lower ticket yields than other genres.

Average customer value overall and by genre 2014-16

The chart below shows average customer value over the period between April 2014 and March 2016. This is the value of each individual booker across all venues and orchestras.



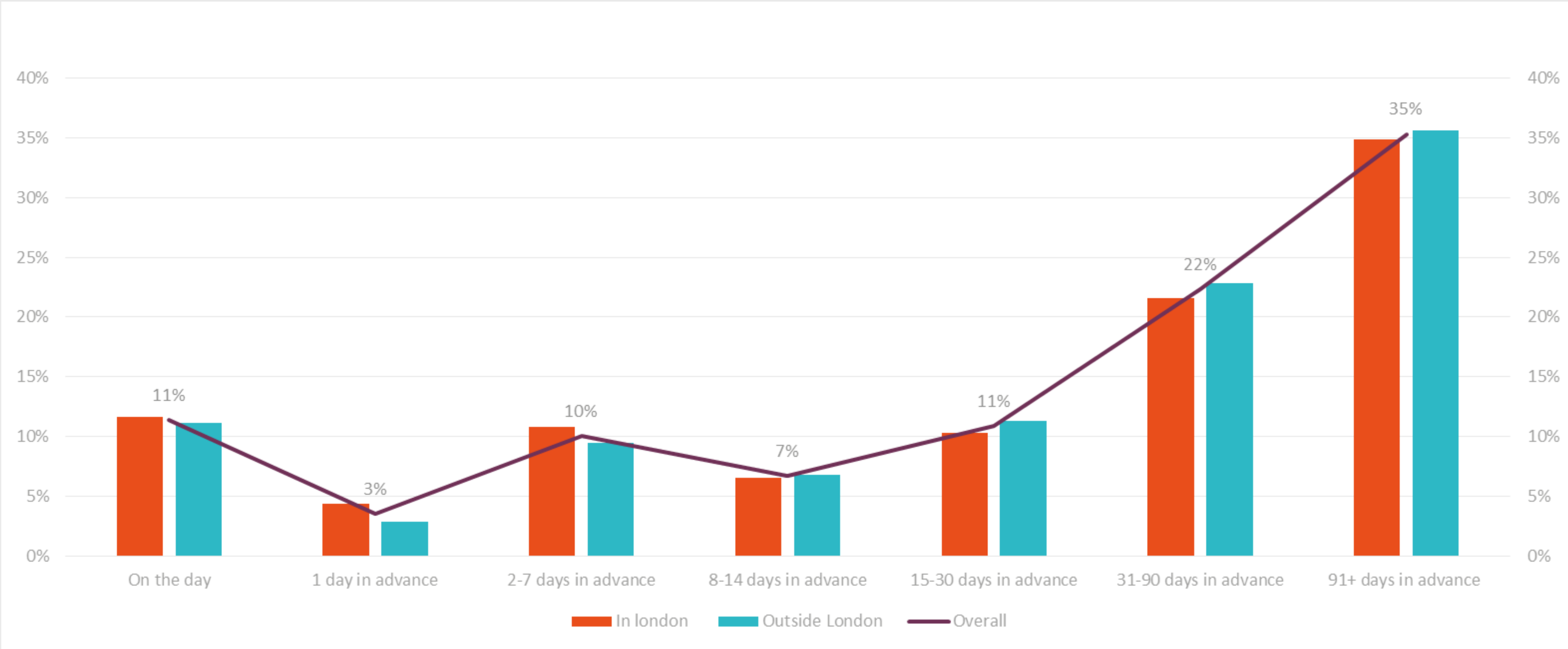
Average overall customer value for classical music was £101.69 across the two years.

Customer value was highest for Orchestral programmes, Popular Classical and Chamber & Recitals. It is interesting to consider the differing factors behind higher customer value for each of these genres. For Orchestral and Chamber & Recital concerts, high customer value is attributable to higher booking frequency, despite the more average ticket yields for these genres. In contrast, Popular Classical concerts have one of the lowest booker frequencies but the highest ticket yield.

Customer value was lowest for Children & Family Concerts, Community/Amateur and Youth Music, reflecting both the lower ticket yield and booker frequency for these genres.

How late do audiences book?

Booking lead time comparison 2014-16

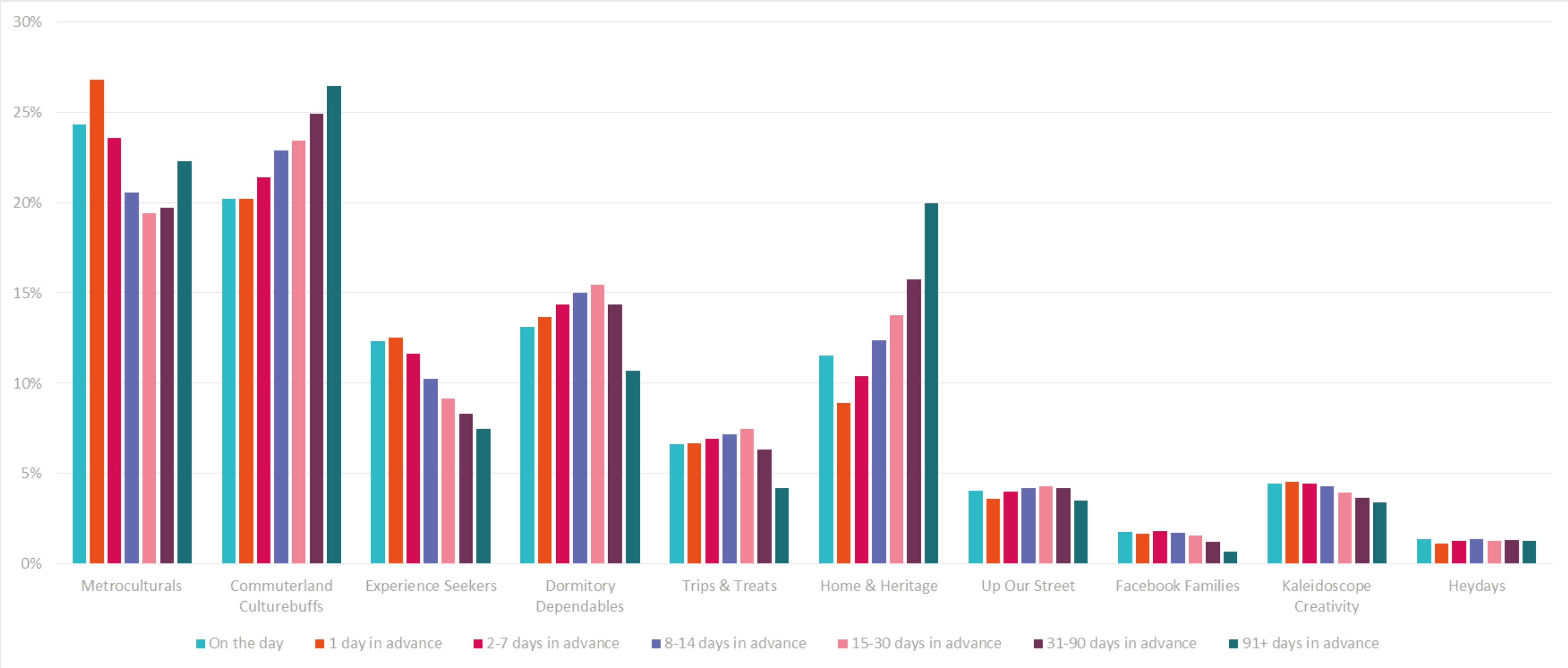


The chart above shows booking lead time for classical music in Greater London, outside Greater London and overall. As can be seen, there was very little difference in booking lead time between organisations in Greater London and outside.

By far the highest proportion of audiences (35%) booked over 90 days in advance. The overall Audience Finder cross artform benchmark makes for an interesting comparison: in both 2014-15 and 2015-16 just 23% of audiences booked this far in advance. This much higher figure for classical music perhaps reflects the popularity of subscription schemes in the sector.

On the day bookings, at 11%, are lower than the overall Audience Finder benchmark where they represented 16% of bookings in 2014-15 and 15% of bookings in 2015-16.

Lead time by Audience Spectrum profile



The chart shows the proportion of each Audience Spectrum segment in each booking time band, eg Metroculturals make up 24% of total on the day bookers and 27% of those booking one day in advance.

Higher proportions of Metroculturals and Experience Seekers booked closer to the event, but this trend is reversed for Commuterland Cuturebuffs who were more likely to book further in advance. Home & Heritage in particular were more likely to book over 90 days in advance. Transport and planning may be more of a concern for this older group, many of whom also have additional access requirements.

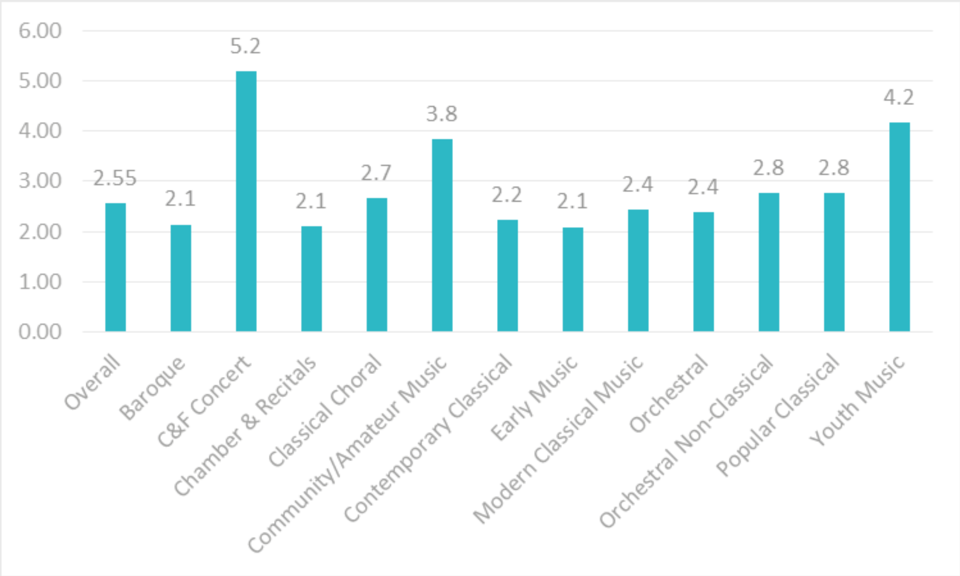
This information suggests that Commuterland Culturebuffs and Home & Heritage are more likely to be concert subscribers than other groups.

Dormitory Dependables and Trips & Treats were less likely to book over 90 days in advance. The high proportion of families in these groups may mean they need greater flexibility. These groups are also particularly likely to attend Children & Family, Youth Music, Popular Classical and Orchestral Non-Classical concerts, all of which are less likely to be part of a venue or orchestra’s subscription series.

These findings can inform the communications mix and timings required to reach the widest possible audience. For example the younger Experience Seekers and Metroculturals may respond to digital information released close to an event, whereas Home & Heritage are more likely to require print in advance.

What are the trends in party size?

Average party size overall and by genre 2014-16



Unsurprisingly, Children & Family Concerts attracted the largest party sizes at an average of 5.2 people. This figure does seem particularly high and suggests that many bookers may visit with extended family or in groups with multiple families. Also significantly higher than the overall national classical music average of 2.55 people were Youth Music at 4.2 and Community/Amateur Music at 3.8.

The lowest average party sizes were for Baroque, Chamber & Recitals and Early Music at 2.1 people. The lower overall party size averages for these genres suggest that a significant proportion of audiences may attend alone.

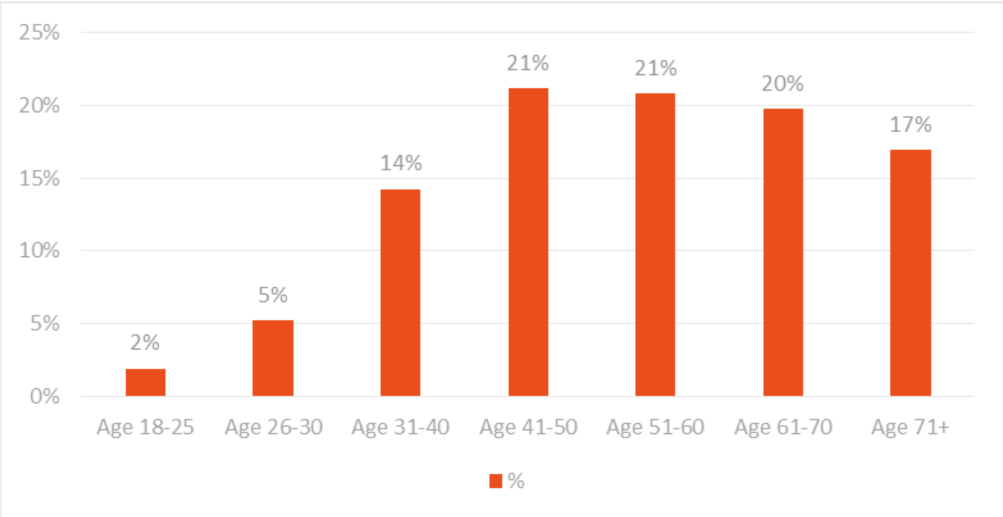
The overall national average party size was 2.55 people. This was slightly higher outside London at 2.68 people than in London at 2.38.

Are audiences for classical music ageing?

To answer this question, we have used Audience Spectrum to estimate the age of classical music audiences. Modelled age breakdowns have been calculated using the Audience Spectrum breakdown of classical music audiences and the age breakdown at national level within each segment.

These ages are an estimate, but give us an indicative sense of the likely patterns in age for classical music at this point in time.

Modelled age breakdown for classical music audiences nationally

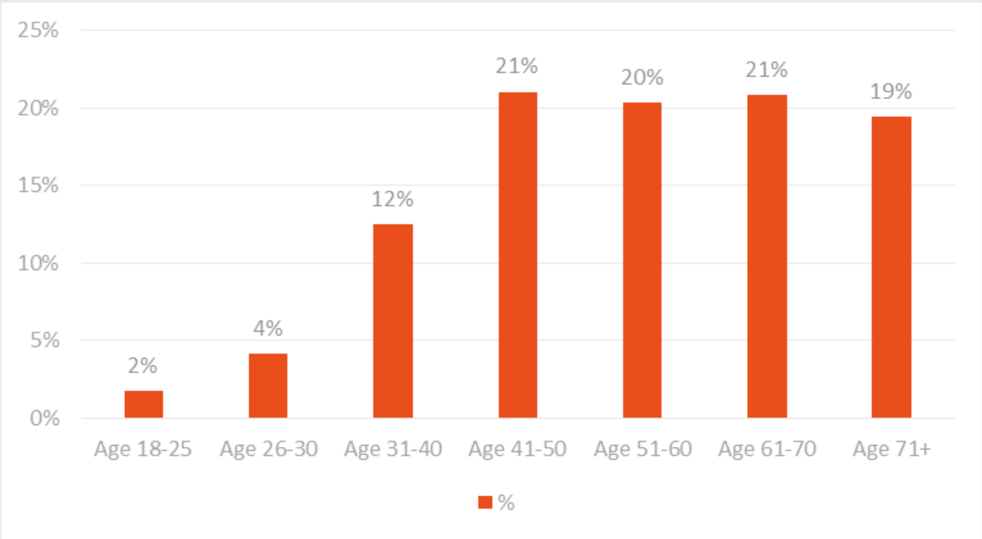


The modelled age breakdown above shows that audiences nationally are much more likely to be in the middle and older age groups. 42% of are likely to be aged 41 – 60 and 37% aged over 61. Just 7% are likely to be aged under 31.

This provides us with an estimated age at one point in time, however we are not currently able to determine whether audiences are gradually getting older, or if the picture is constant over time with younger people becoming classical music audiences a little later in life and replacing older audiences.

A number of programming and marketing initiatives are taking place within the sector to increase attendance by younger people, including students. By monitoring age over the next few years we will be able to see patterns and monitor the impact of these initiatives over time.

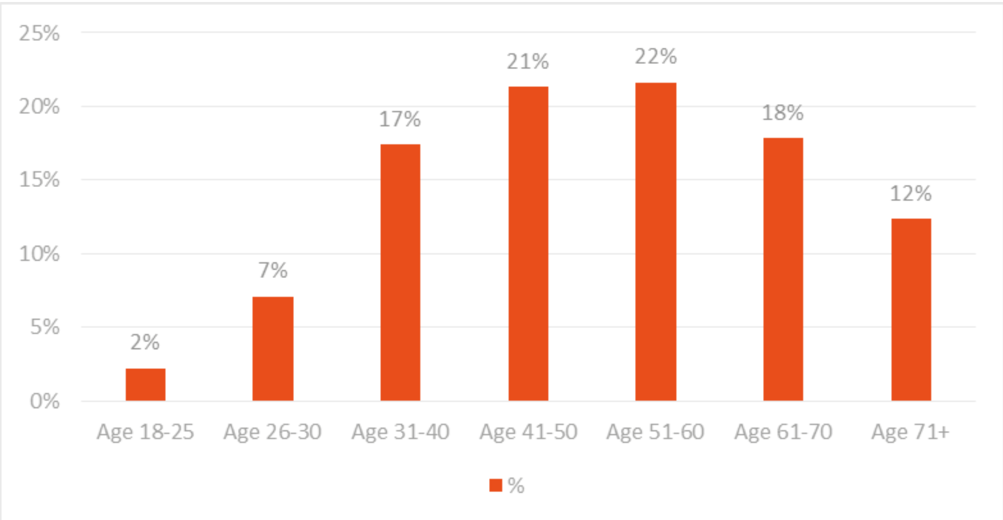
Modelled age breakdown for classical music audiences outside Greater London



The modelled age for audiences outside Greater London shows an older leaning than the national estimate. 40% are likely to be aged over 61 and a lower proportion, 18%, aged under 40.

This estimate reflects differences in the age of the population inside and outside London. 22% of the overall English population nationally is aged 60+, however outside London that figure rises to 24%. (Source: Census 2011)

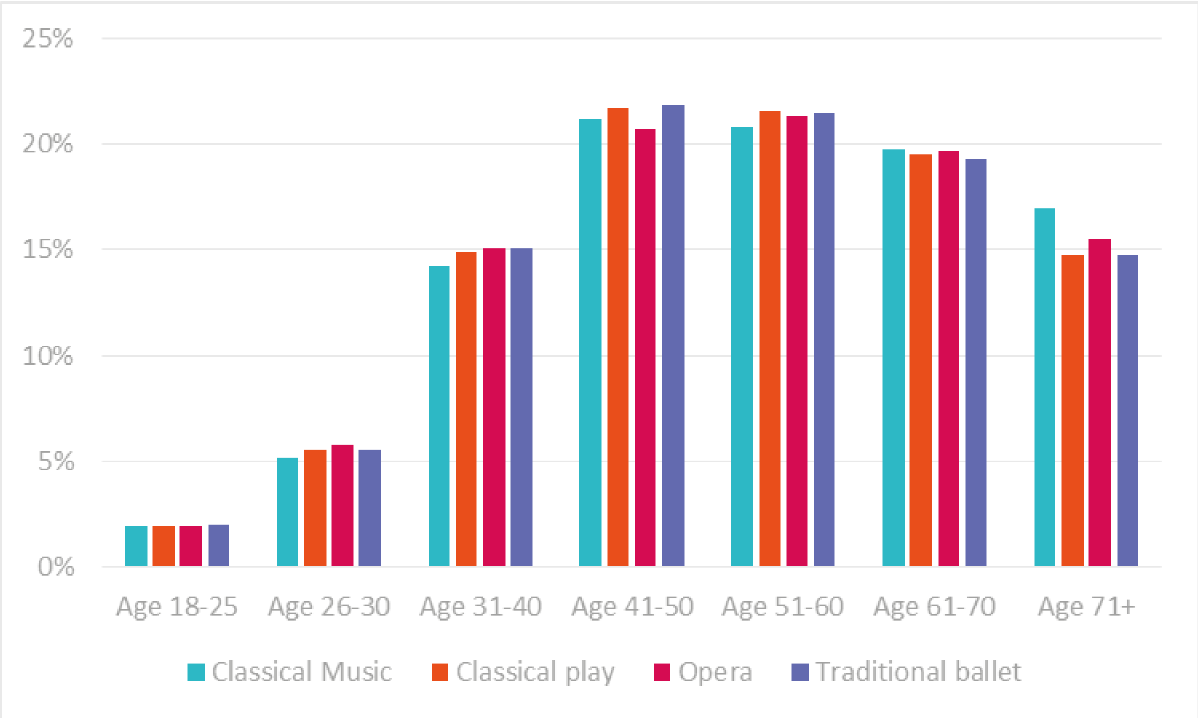
Modelled age breakdown for classical music audiences in Greater London



In Greater London, the estimate suggests that audiences are more likely to be aged 26-40 and 51-60 than elsewhere. 30%, as compared to 40% outside London, are likely to be aged over 61.

Again, this reflects differences in the population age profile. Just 16% of the London population is aged 60+ compared to 24% outside London. (Source: Census 2011)

Modelled age breakdown for classical artforms



The chart above suggests that older audiences are not a phenomenon restricted to classical music. These age proxies have been modelled in the same way as those presented earlier, using data within the Audience Spectrum profiles.

Apart from a slightly higher proportion of classical music audiences estimated to be aged 71+, the profiles follow an almost identical pattern for each of these classical artforms.

Implications and Recommendations

Audience Spectrum profiles

The Audience Spectrum profiling in this report can be used to inform a wide range of strategic and tactical decision making. The profiling shows trends both inside and outside London across classical music genres, compared to the population profile. This information allows organisations to understand the likely prospects for different types of product, as well as providing a benchmark against which to compare their own organisation's profiles.

Through the full pen portraits online theaudienceagency.org/audience-spectrum the characteristics of each segment can be explored in much greater detail to inform decision making for programming, marketing and engagement initiatives.

More detailed information on local and regional Audience Spectrum population breakdowns is available at audiencefinder.org or directly from The Audience Agency and allows organisations to identify potential within the local area.

Outside London

The medium engaged Audience Spectrum segments are particularly important audiences for classical music outside London where they also make up a high proportion of the population. Two of these segments – Dormitory Dependables and Trips & Treats – are more likely to attend popular and low risk concerts. The results also show that frequency is on the lower side for this type of product.

Approaching these segments from two perspectives may be beneficial.

Dormitory Dependables are particularly likely to attend Popular Classical concerts and the data shows high ticket yield but low frequency within the genre, as well as low crossover with other genres. This backs up what we know about this segment – that there is a willingness to pay high prices for something they want to go to, but that attendance is likely to be infrequent, more of a 'treat' than a regular occurrence with the social side being important. There may be opportunities to increase frequency of attendance by Dormitory Dependables through positioning in line with these motivations, as well as offers to reduce the perception of risk for more challenging concerts.

Both Dormitory Dependables and Trips & Treats include a high proportion of households with children and we can see high attendance at Children & Family and Youth Music concerts from these segments. Trips & Treats, however, have lower engagement at other genres. The older age estimate of classical music audiences suggests that many of these family audiences may be lost in the period immediately after their children have grown up, and there may be opportunities in the creation of clearer pathways from family and youth to other types of concert.

In London

In London Metroculturals dominate the market. We can see that the segment attend a wide range of product and that the context in which they attend is likely to change for different genres. It is clear from the findings that they attend both in adult groups and as a family unit, suggesting that their information needs may be particularly wide.

The highly engaged, but younger Experience Seekers segment are underrepresented among classical music audiences in London compared to the London population. Initiatives referenced in the 'ageing audiences' section below may help to reach this group.

Booking behaviours

By far the largest proportion of audiences booked only once for classical music in two years across the dataset, suggesting that many one-time bookers for individual venues and ensembles are not booking elsewhere instead. It is notable that ticket yield is lowest for those who only booked once, suggesting that lower prices may be necessary in order to attract first time and infrequent attenders. In areas with a high concentration of classical music organisations, collaborative initiatives may play a role in increasing frequency for classical music in general.

The generally larger average party sizes for more popular and low risk genres suggest that the social element of a visit is likely to be particularly important for audiences attending these types of events. It may be beneficial to ensure that opportunities to enhance the social side of a visit are developed for both adult and family groups, and that these are communicated.

Average party size is higher outside London suggesting social motivations may be particularly important there, fitting with the profiles of the dominant Audience Spectrum segments outside London.

Compared to the overall cross-artform average, a very high proportion of classical music audiences book over 90 days in advance and a small proportion book on the day.

The Audience Spectrum breakdown by lead time suggests that Commuterland Culturebuffs and Home & Heritage are more likely to book further in advance. They may therefore be the most likely prospects for subscriber schemes and may be more likely to respond to information released a long time in advance. For Commuterland Culturebuffs, this information may include both on and offline communications, however for Home & Heritage offline communications will be essential.

Dormitory Dependables and Trips & Treats were less likely to book over 90 days in advance and this, combined with the high proportion of families in these groups, may mean these segments need greater flexibility. Both of these segments show a peak in booking 15-30 days before a concert, suggesting that communications and reminders around four to six weeks before an event may be particularly successful.

Higher proportions of Metroculturals and Experience Seekers booked closer to the event, suggesting many in these segments may respond well to information and reminders released close to an event. Digital communications are particularly important for these segments.

Ageing audiences

Age is a key issue for the sector. Findings here present an estimate of the current likely age of classical music audiences, however in order to get a sense of patterns and how to respond to these, it will be necessary to monitor age over the next few years.

Age modelling such as that presented provides an estimate of age, however a more accurate picture will be established through a commitment across the sector the collect consistent survey data over the longer term.

In the meantime, organisations can look at other factors to estimate the extent to which ageing audiences are likely to be an issue for them. A drop in capacity sales over the last few years, for example, may suggest that ageing audiences are not being replaced, whereas consistent capacity sales over time may suggest that older audiences are being replaced with younger ones. Although, of course, consistency or a drop in capacity may also be attributable to other factors.

There are a number of initiatives taking place in the sector which aim to increase younger audiences. These include programming initiatives such as cross artform work and concerts in different locations, as well as marketing initiatives designed to increase attendance from younger groups including students.

The estimated age of audiences is very similar across classical artforms overall. The classical music sector may therefore benefit from including these other artforms in discussions around age and in encouraging the sharing of good practice across artforms.

The Audience Spectrum profiles suggest that there may be opportunities to increase attendance at classical music from the younger Experience Seekers segment both in and out of London. Initiatives mentioned above may appeal to the needs and motivations of this group and, in general, attendance by Experience Seekers could potentially be increased in urban areas with the right product, positioning and marketing.

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Appendix – Genre Crossover Table

Read the table from left to right ie out of 7,916 Baroque bookers, 135 or 2% also booked for Children & Family Concerts.

Genre/Genre	Baroque	C&F Concert	Chamber & Recitals	Classical Choral	Community/Amateur Music	Contemporary Classical	Early Music	Modern Classical Music	Orchestral	Orchestral Non-Classical	Popular Classical	Youth Music	Popular Classical
Baroque		2%	22%	28%	3%	9%	14%	1%	44%	3%	9%	3%	9%
7,916		135	1713	2179	256	743	1131	89	3500	227	726	266	726
C&F Concert	1%		3%	5%	2%	1%	1%	0%	11%	2%	3%	2%	3%
14,371	135		411	710	247	203	104	27	1611	258	461	250	461
Chamber & Recitals	5%	1%		11%	3%	5%	5%	1%	34%	1%	6%	2%	6%
36,713	1713	411		4006	1034	2007	1981	283	12431	324	2226	759	2226
Classical Choral	8%	3%	15%		5%	6%	7%	1%	37%	2%	6%	4%	6%
26,693	2179	710	4006		1244	1507	1792	189	9763	582	1569	1006	1569
Community/Amateur Music	1%	1%	5%	6%		2%	1%	0%	14%	1%	4%	3%	4%
21,020	256	247	1034	1244		398	235	71	2987	252	759	613	759
Contemporary Classical	3%	1%	8%	6%	2%		3%	1%	16%	1%	4%	1%	4%
26,369	743	203	2007	1507	398		747	224	4139	289	982	367	982
Early Music	11%	1%	20%	18%	2%	8%		1%	30%	1%	4%	2%	4%
9,843	1131	104	1981	1792	235	747		76	2929	85	367	195	367
Modern Classical Music	3%	1%	9%	6%	2%	7%	2%		21%	3%	11%	2%	11%
3,141	89	27	283	189	71	224	76		648	99	360	56	360
Orchestral	3%	1%	10%	8%	3%	3%	2%	1%		2%	5%	2%	5%
119,471	3500	1611	12431	9763	2987	4139	2929	648		2775	6429	2444	6429
Orchestral Non-Classical	2%	3%	3%	6%	2%	3%	1%	1%	27%		19%	2%	19%
10,207	227	258	324	582	252	289	85	99	2775		1971	249	1971
Popular Classical	2%	1%	5%	4%	2%	2%	1%	1%	15%	4%		1%	100%
43,872	726	461	2226	1569	759	982	367	360	6429	1971		516	43872
Youth Music	3%	2%	7%	10%	6%	3%	2%	1%	23%	2%	5%		5%
10,547	266	250	759	1006	613	367	195	56	2444	249	516		516