Beyond the Pandemic

A snapshot of ticketed audiences in challenging times

Oliver Mantell, Director of Evidence & Insight

March 2023

the audience agency

Month (/day/time)

Metrics

Scale of organisation

Location

Audience profile

Programming

Lead time

Transaction value

Background trends

Variability

Behaviour and attitudes

-12%

About the Analysis

Average of 2017, 2018 & 2019 compared to 2022

based on a ‘consistent cohort’ overall, and for each art form

Category	Orgs	Tickets	% Art Form
Overall	193	30.2M	n/a

- Like-for-like comparison
- Focus on where art form is significant
- Avoid art form coding ‘hiding’ recent sales

Art forms cover c. 11% of total benchmark, or 25% of coded

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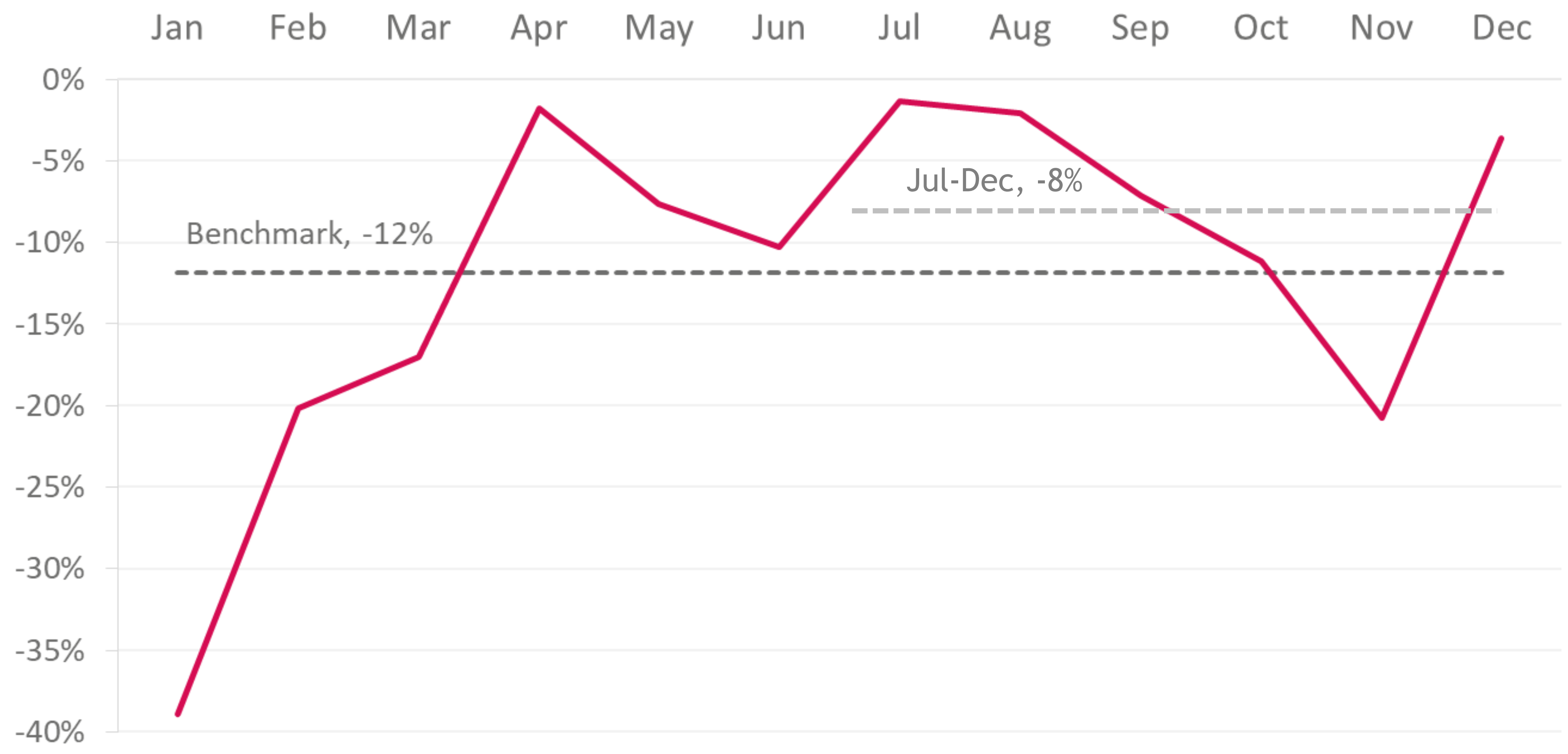
2022 tickets compared to average of 2017/19, by month



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Changes by day/time

Matinee	Performances	Tickets	Tickets per Perf.
Weekday	23%	-6%	-24%
Weekend	21%	-6%	-18%

Evening	Performances	Tickets	Tickets per Perf.
Weekday	-5%	-11%	-7%
Weekend	-2%	-12%	-10%

Matinee = start 12.00 - 14.30

Evening = start 18.00 – 20.30

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Tickets: -12%

Income: -2%

Bookers: -3%

Bookings: -11%

Perfs: +5%

Income/ tickets: +11%

£21.82 - £24.32 avg price paid

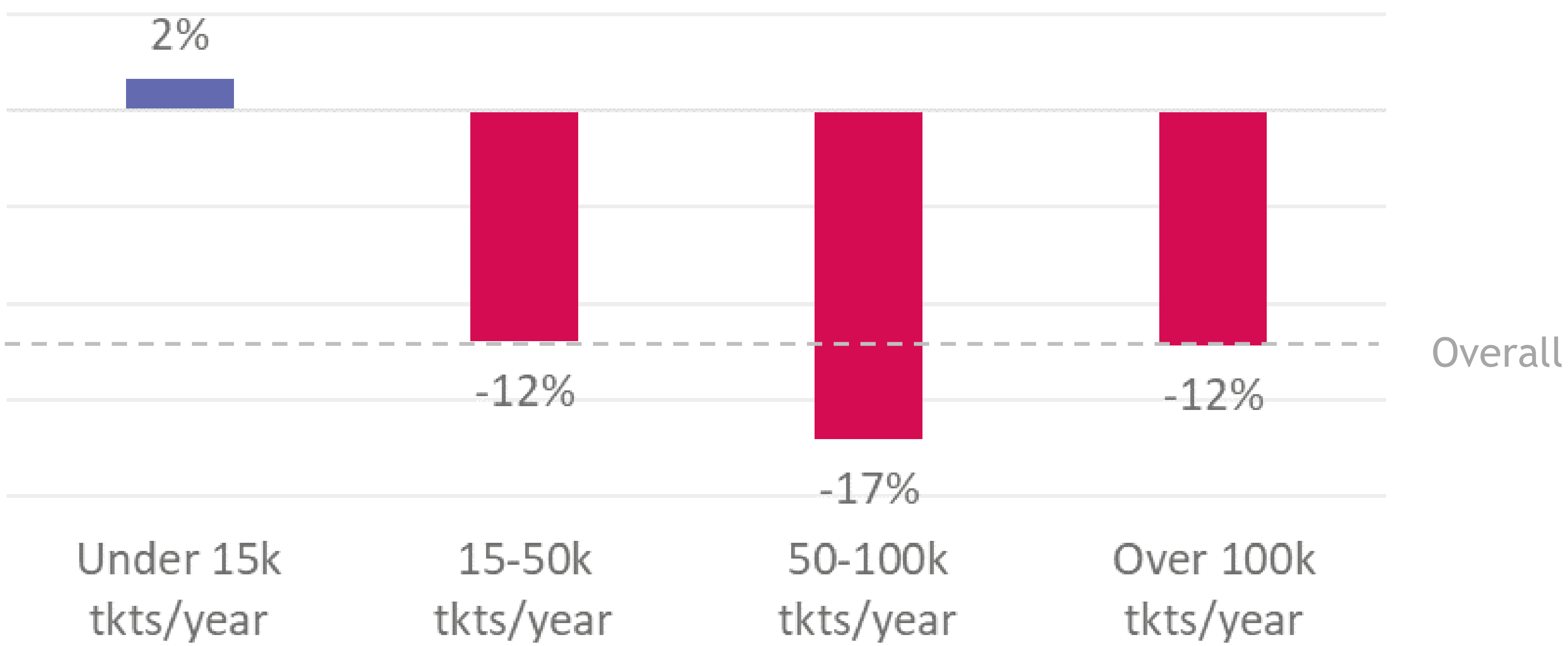
Tickets/ perf: -16%

143 – 121 avg audience size

Bookings / booker: -8%

Once every 172 – 185 days

2022 % change in tickets compared to 2017-19 by venue size



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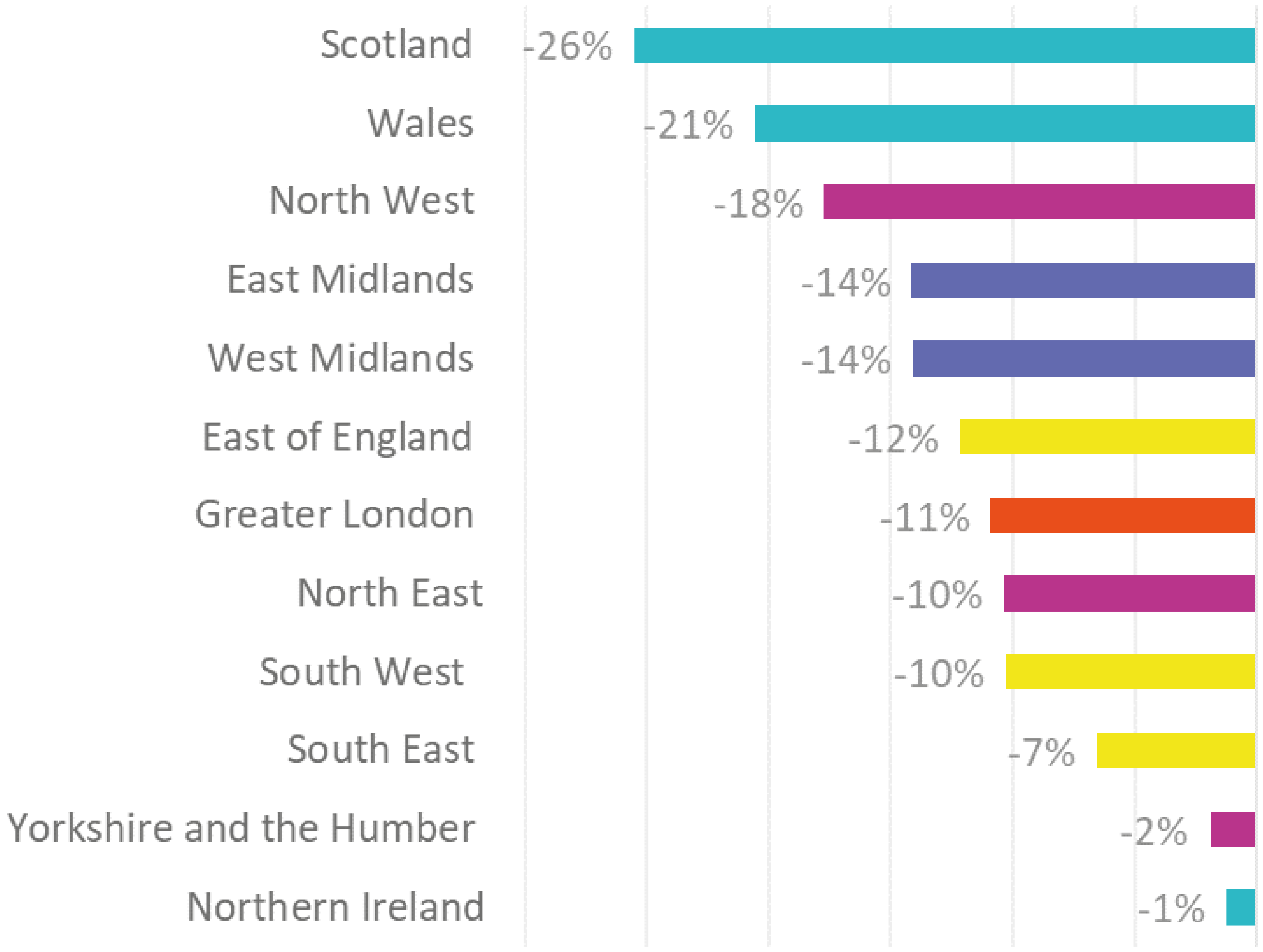
Regions: variation



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London venues: variation

Change	Tickets	Income
Nationals	-16%	-11%
Other London	-25%	-19%
BUT…		
Londoners	-11%	-9%

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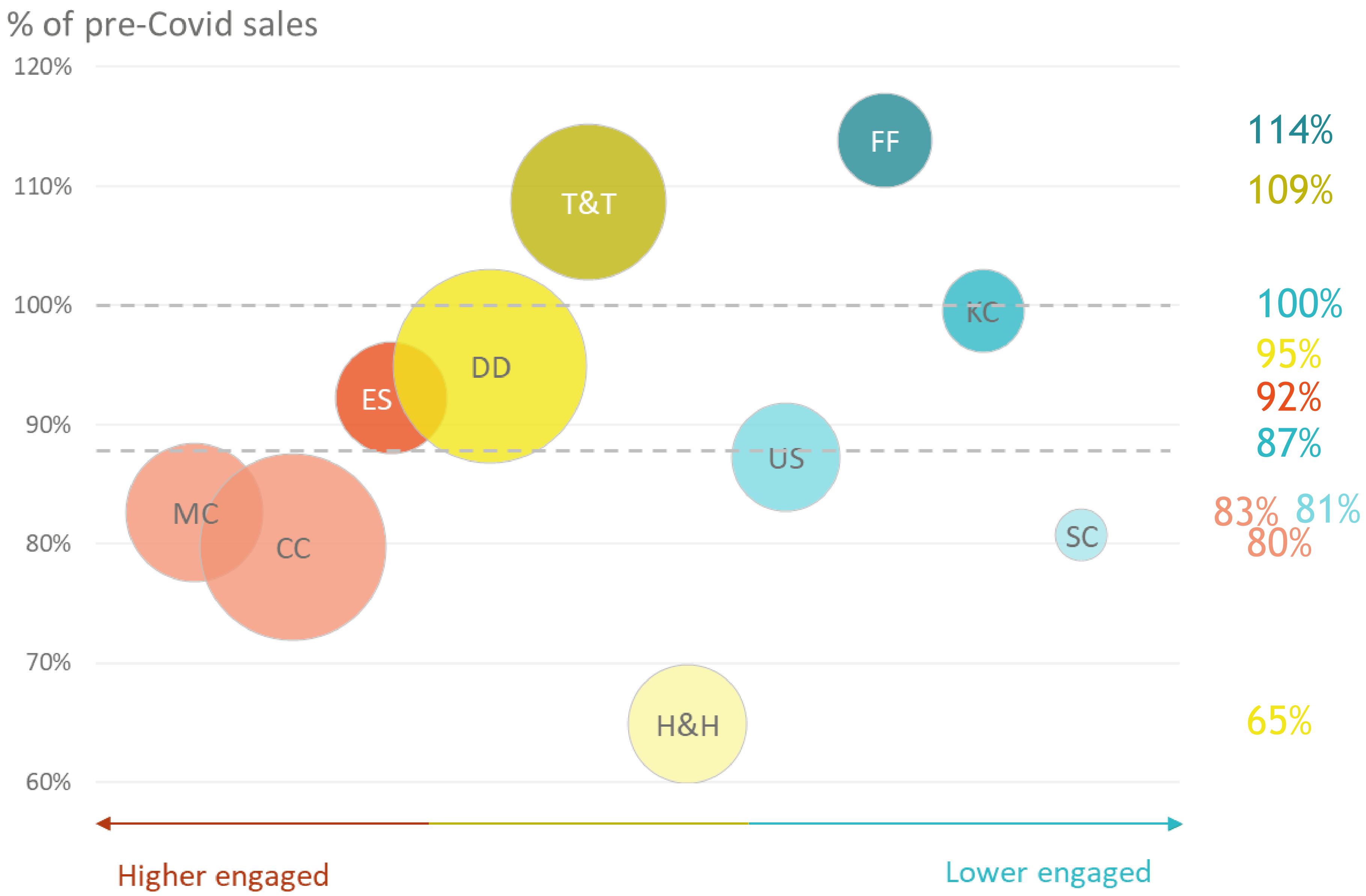

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Commuterland Culturebuffs Differences

39%

of the drop in ticket sales from this one segment

(33% from Home & Heritage)

39%

of change in venue income explained by % change in this one segment

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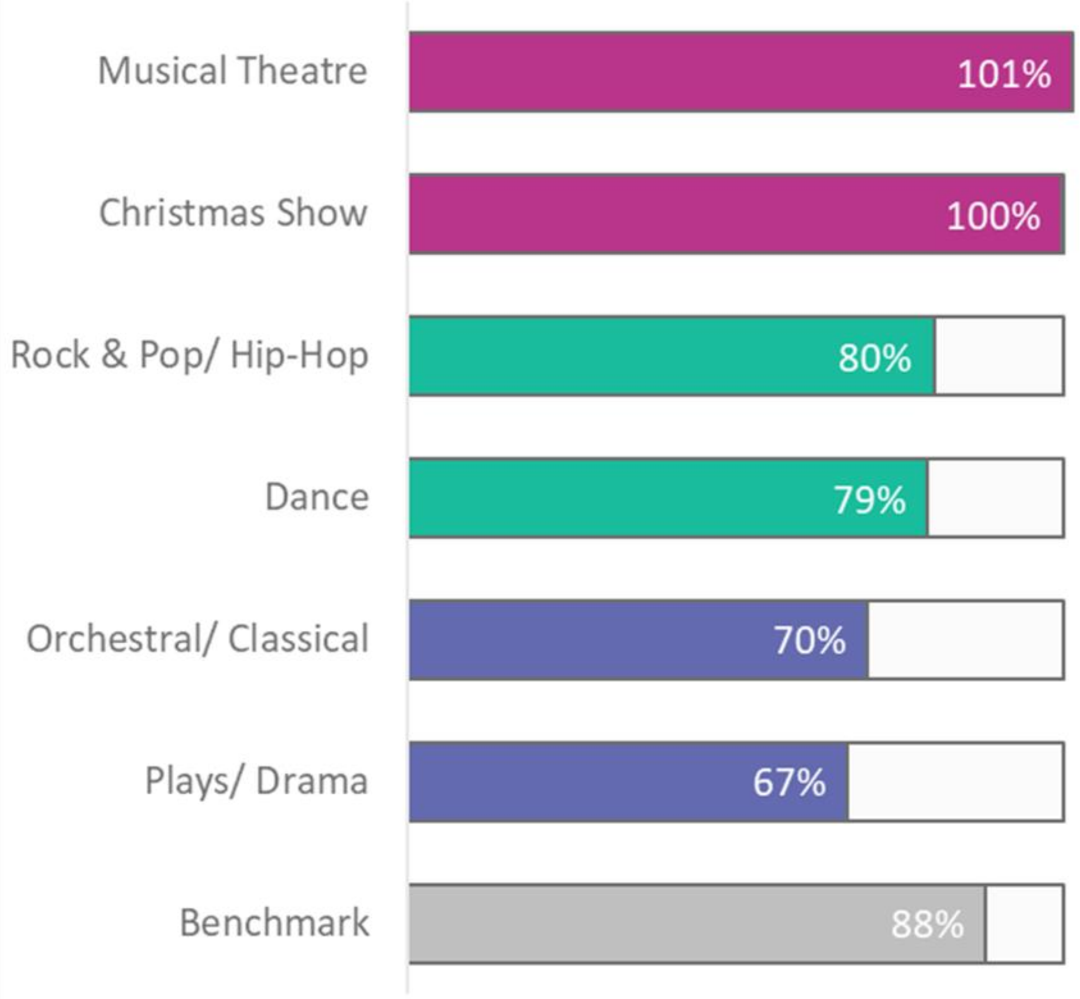
Tickets by Art Form



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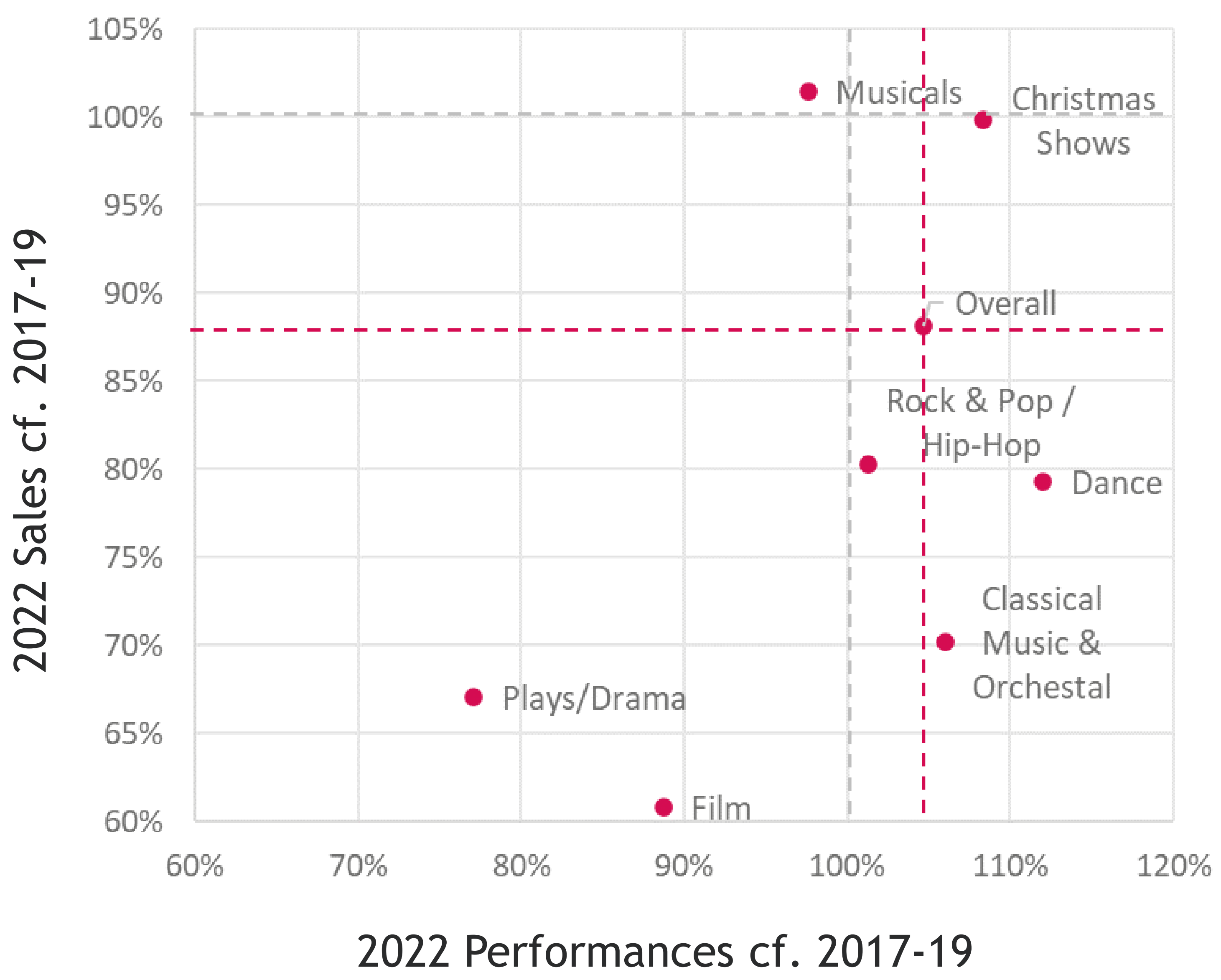

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	M	CC	ES	DD	T&T	H&H	UoS	FF	KC	SC
Musical Theatre	-20%	-13%	3%	10%	29%	-23%	4%	42%	13%	5%
Christmas Show	-5%	4%	6%	18%	31%	-20%	0%	31%	5%	-4%
Rock & Pop/Hip-Hop	-2%	-18%	-16%	-15%	-8%	-25%	-19%	-8%	-17%	-23%
Dance	-15%	-16%	3%	7%	37%	-30%	1%	34%	-5%	5%
Orchestral/Classical	-1%	-29%	0%	-22%	-17%	-44%	-31%	-14%	11%	-33%
Plays/Drama	-23%	-33%	-15%	-23%	-13%	-43%	-29%	-11%	-3%	-29%
Benchmark	-7%	-10%	0%	0%	11%	-23%	-7%	13%	3%	-10%

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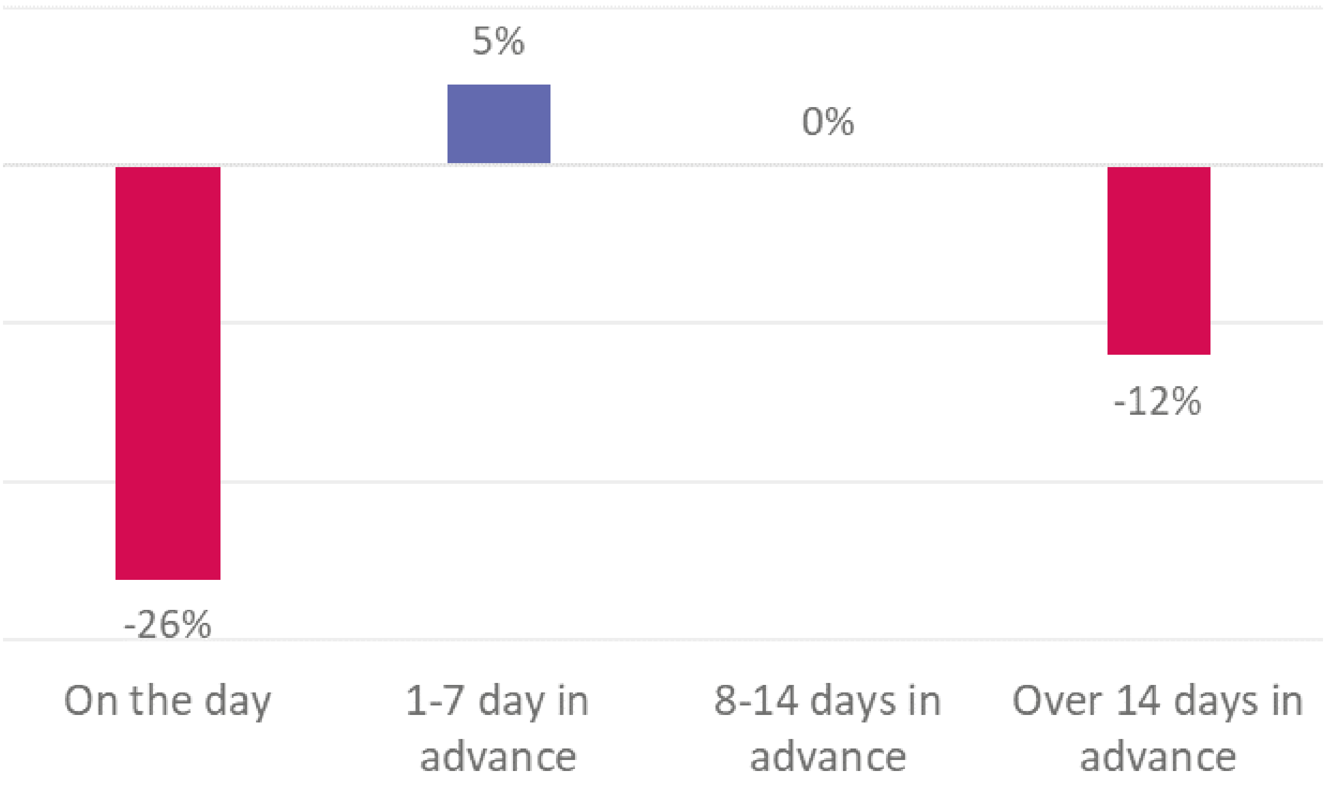

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Bookings by ticket yield

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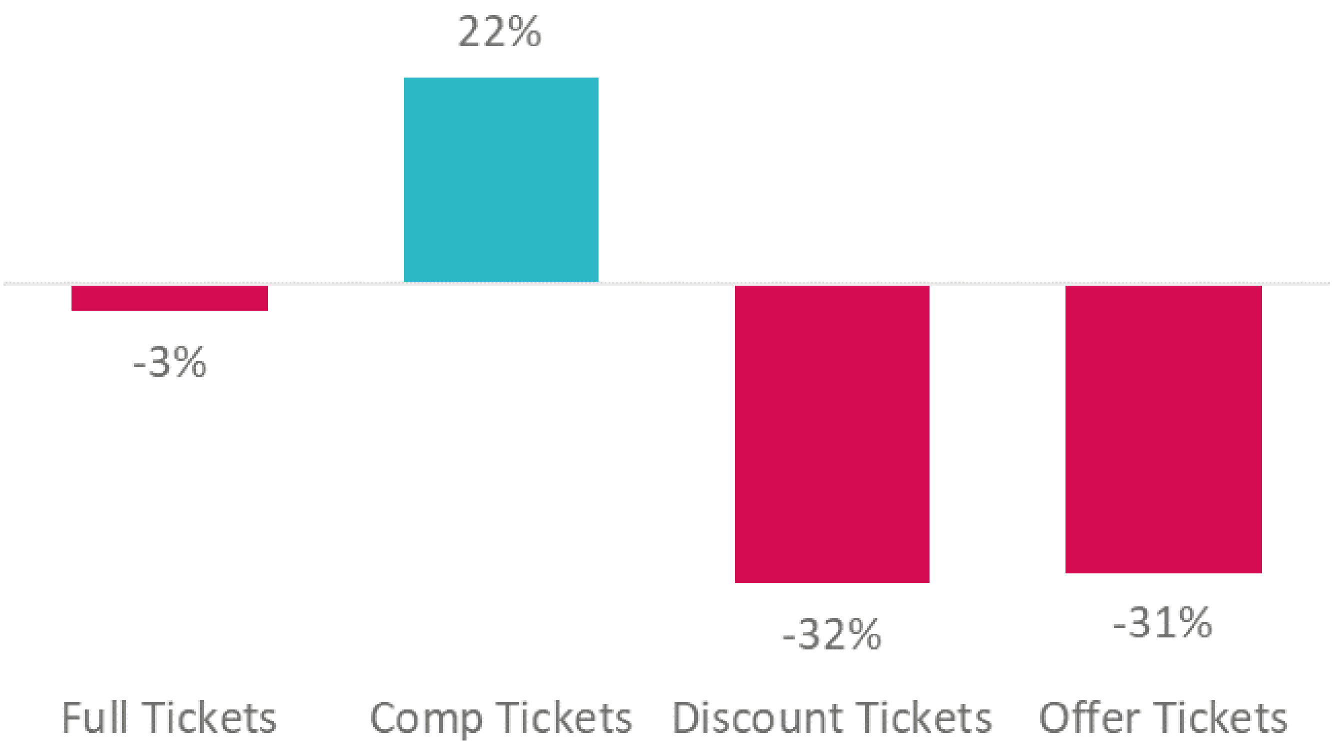
Bookings by ticket type



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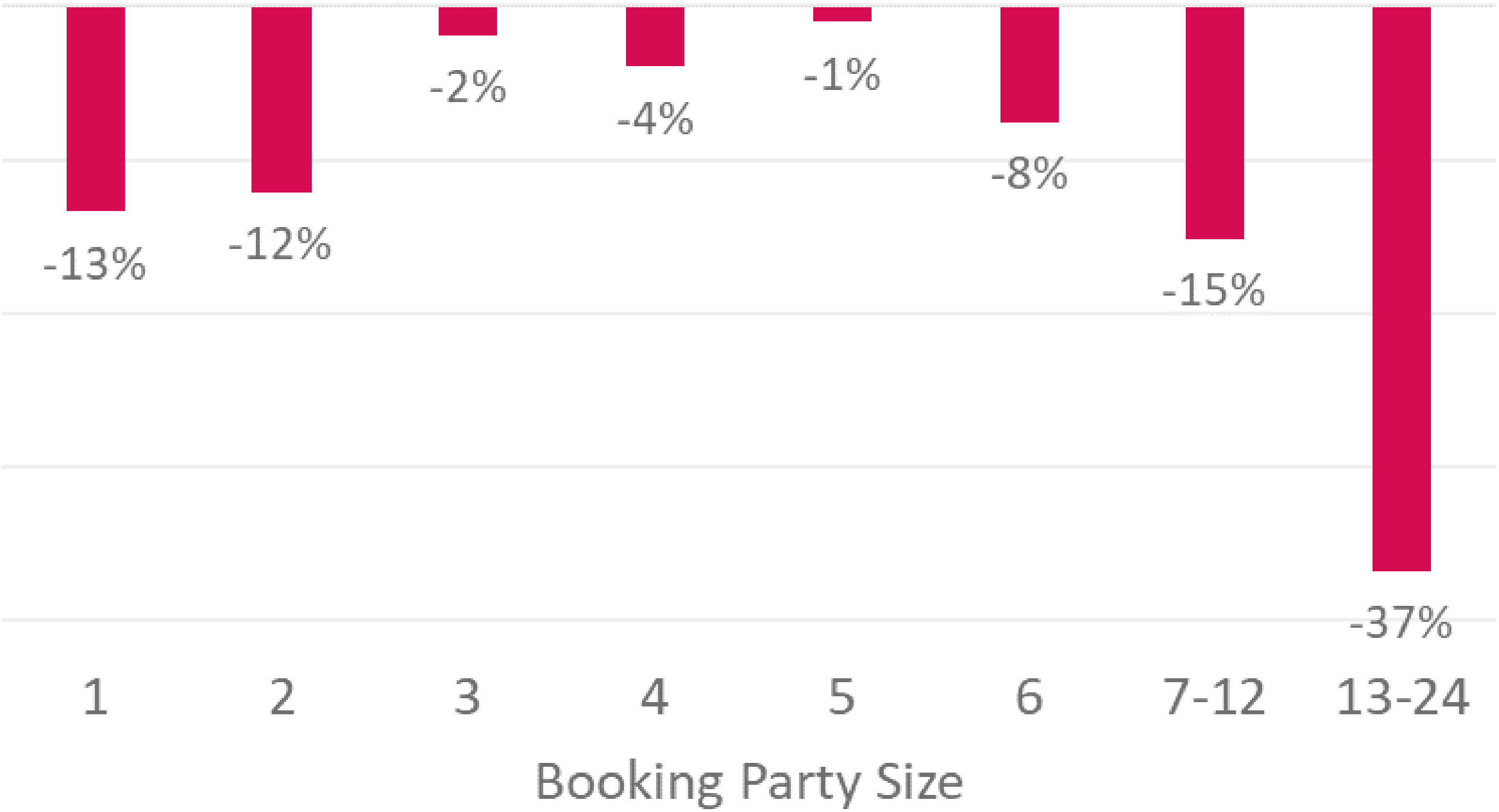
Bookings by Party Size



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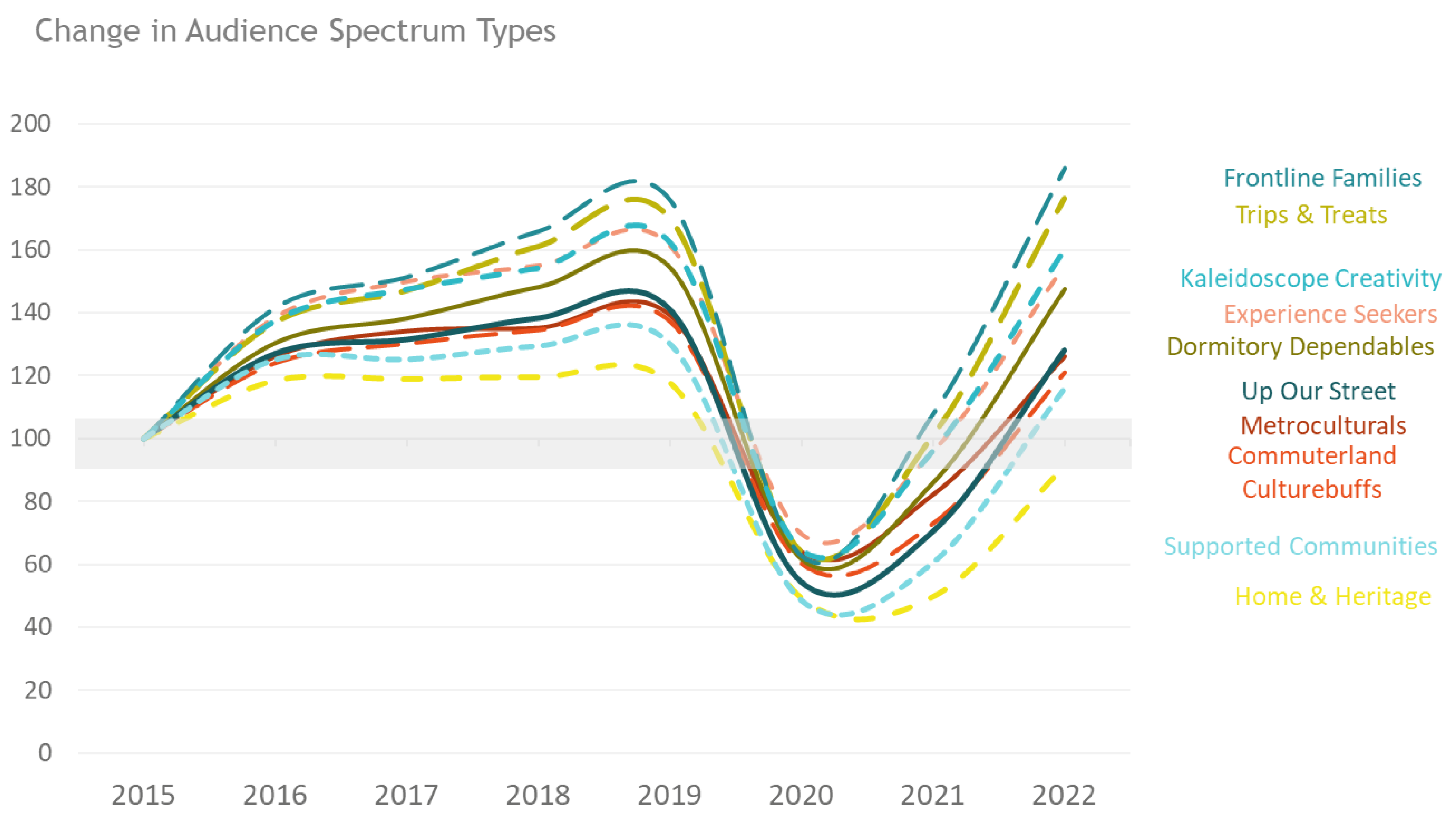

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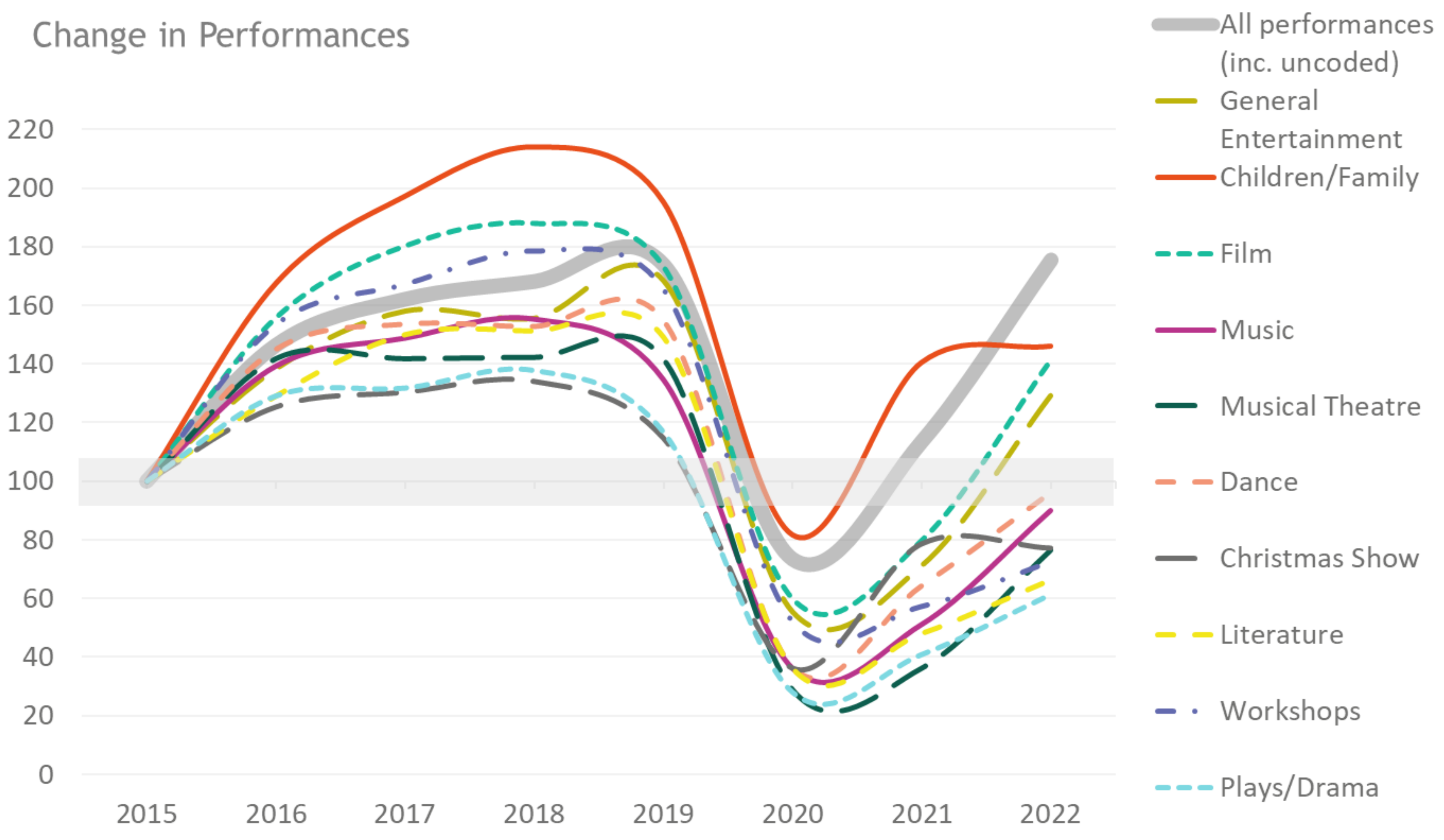

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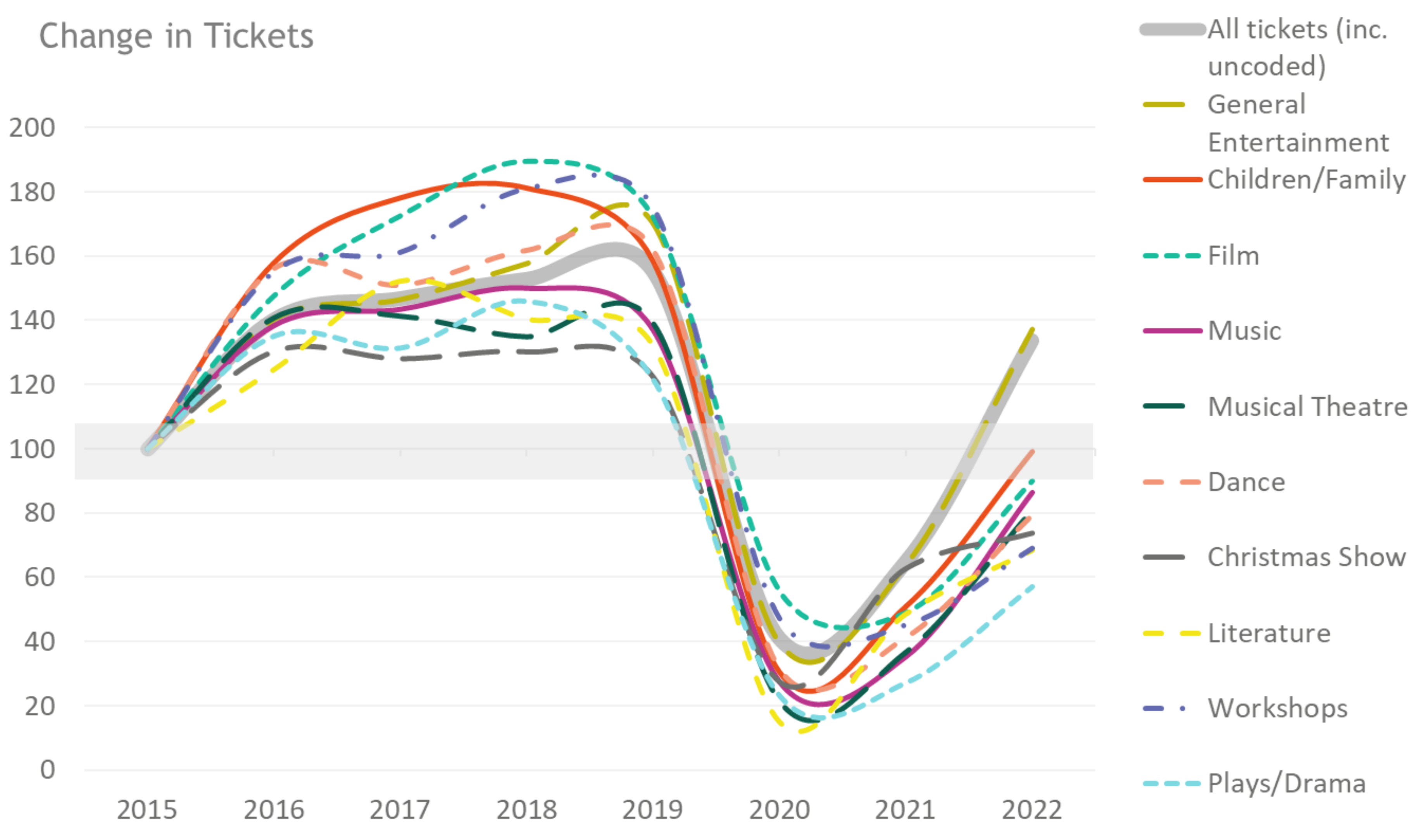

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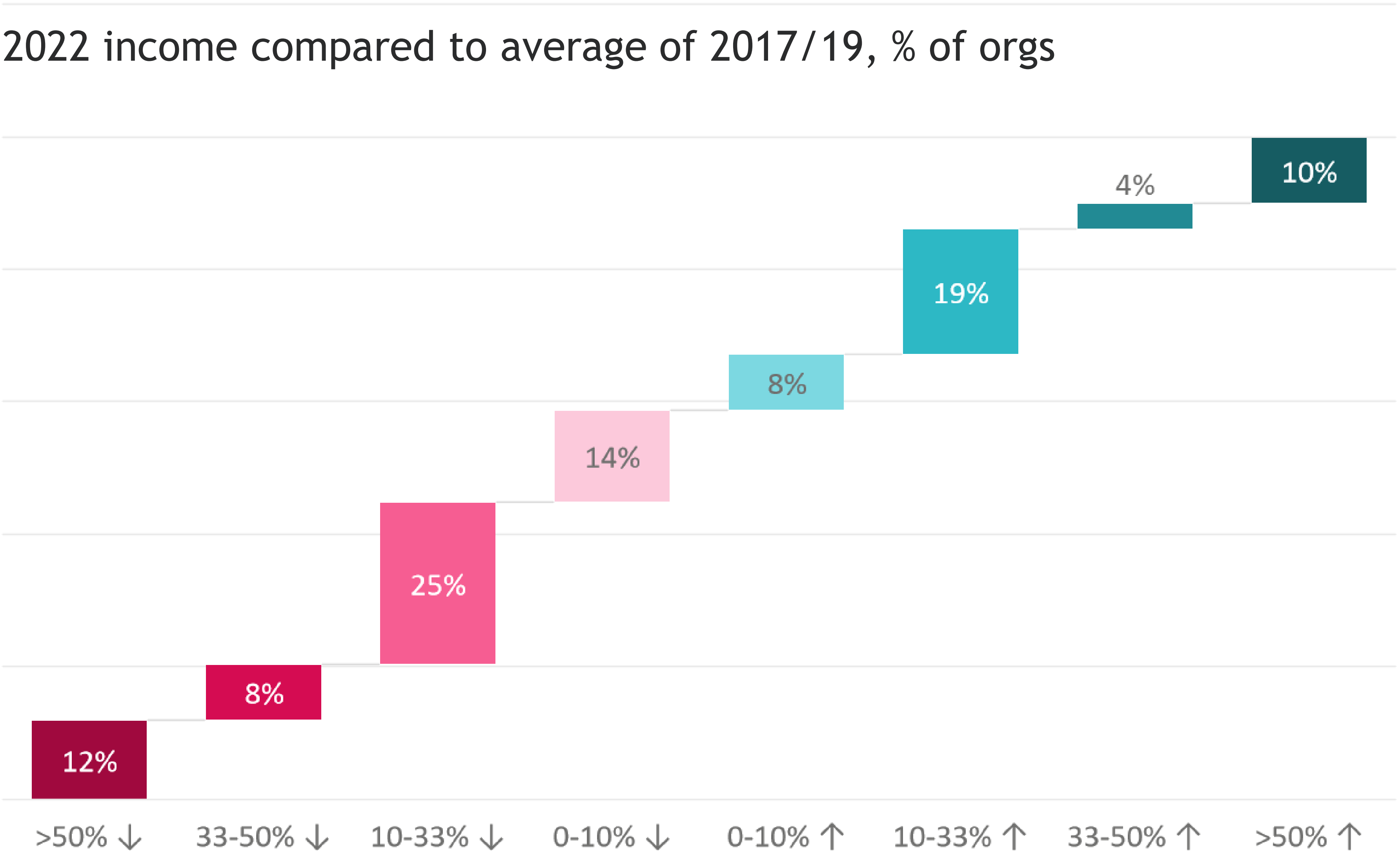

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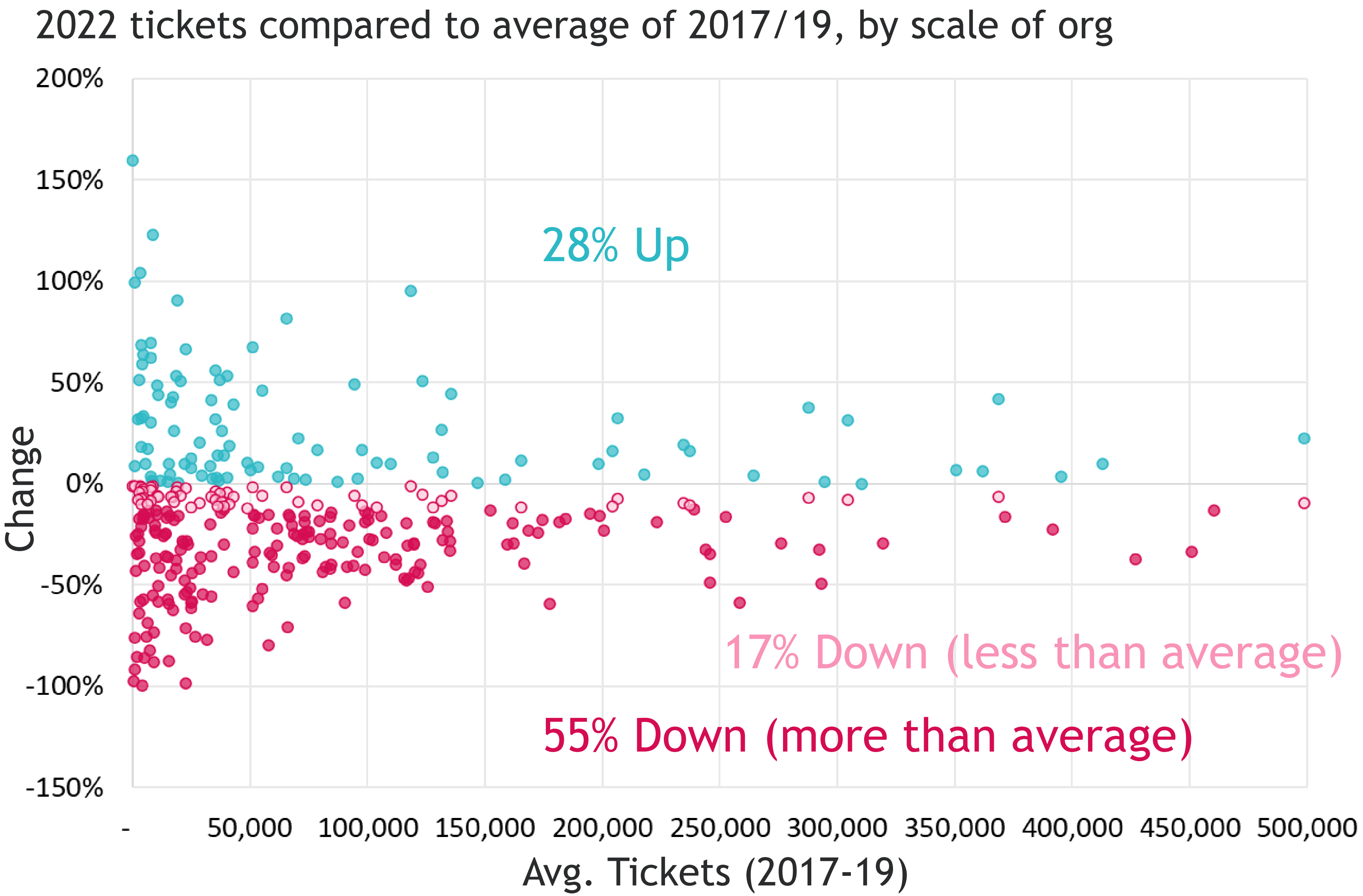

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Put off by Covid:

24%

esp. age 65+ (30%), disabled (34%), highest educated (32%)

Put off by Cost of Living:

61%

esp. families (68%), age 25-44 (68%), unemployed (72%)

Booking Later:

40%

esp. age 25-44 (49%), families (48%), high Covid worries (52%)

Attending More / Less:

12% / 37%

More: esp. London (20%), 6-24 (22%), families (17%)
Less: esp. age 45-64 (41%), currently worse off (50%)

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Reason for <u>Attending</u> Less (selected)

There's less I want to see or do	**13%**
I have fewer people to go with	**16%**
I got out of the habit	**22%**
I can't afford it anymore, or want to save money	56%
I have new/greater caring responsibilities	**10%**
I don't have time/energy	**25%**
It's harder to get to the venues	**15%**
I'm trying to avoid falling ill	**18%**
My physical health is worse than it was	**17%**
My mental health is worse than it was	**14%**
Other reason	**5%**
None of the above/ No particular reason	**5%**

Month (/day/time)	Jan-Feb, Nov; evenings	Apr, Jul-Aug, Dec; matinees
Metrics	Tickets / Bookings	Income / Bookers
Scale of organisation	50-100k tickets	<15k tickets
Location	Metropolitan / Core cities	Smaller cities / Towns / Other
Audience profile	H&H, CC (older, traditional, rural)	T&T, FF, DD, ES (younger, families)
Programming	Plays/drama, Classical music	Christmas, Musicals
Lead time	On the day, 14+ days	1-7 days
Transaction value	7+ tickets	3-6 tickets
Background trends	Plays/drama falling	Family groups growing
Variability	72% down for tickets	1/3 > 1/3 different (41% £↑)
Behaviour and attitudes	Cost of Living key (61%)	Covid less important (24%)

What To Do?: Insights

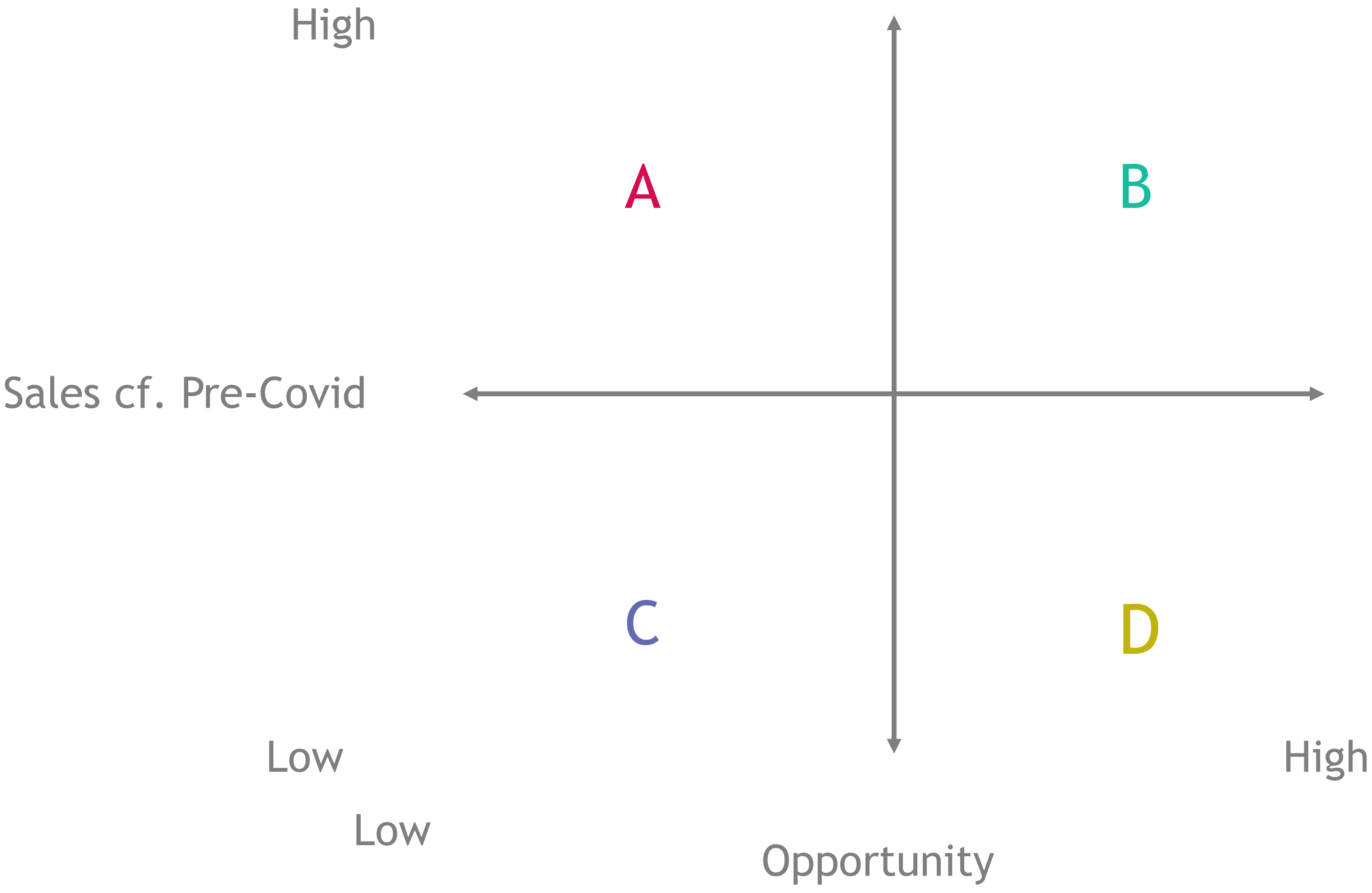
- Understand your situation, esp.:
  - Change overall
  - Key metrics
  - Previous (and current) profile
  - % of total drop by segment
  - Programming mix / art form sales

i.e. plot yourself on these slides

- Understand your audience, esp.:
  - What do they most value?
  - What barriers are they experiencing?
  - Variation re cost of living / Covid
  - How the whole offer fits together
  - How the social context fits in…

i.e. put yourself in their shoes

What To Do?: Actions



A: Prioritise key segments: identify what's working and double down

B: Extend and explore how to reach new groups; try out premium offers

C: Retrench/Reposition by focusing on barriers, pain points and motivations for current audiences; and which offers no longer work, as well as nurturing any 'green shoots'

D: Diversify and experiment to reach new groups, tailor offers via consultation, prioritise barriers

Your Reflections and Q&A

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Thank you

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