



Report | Back Light

What Audience Finder ticketing data tells us about
an 'average' pre-COVID-19 theatre year.

Analysis of Audience Finder Ticketing Data in response to Covid19

Summary Report

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Audience Finder Ticketing Analysis Summary Report (Covid19)

This report summarises sales data from Audience Finder to support the Department for Digital, Culture, Media and Sport (DCMS), Arts Council England (ACE) and cultural organisations in planning their response to Covid19. It provides information on the 'typical' year of sales (overall, for ACE National Portfolio Organisations and by

It contains the following analysis:

1. Income per week (overall and by art form, inc. cumulative overall)
2. Tickets per week
3. Summary of the 'theatre year': income, tickets, bookers and bookings per week, average value of transactions and tickets by week
4. The number of performances per week overall and by art form
5. Audience Spectrum profile by week (inc. which are above/below average for each type)
6. Sales by Arts Council England (ACE) National Portfolio Organisations (NPOs), overall and split by Region/Area.

We will also regularly update a separate report (**'Audience Finder Ticketing Analysis Tracking Report (Covid19)'**) containing the following charts, to track how the situation progresses:

- All AF orgs' combined income by week
- All AF cumulative income by week
- NPO income by week
- NPO cumulative income by week
- NPO income by Area by week

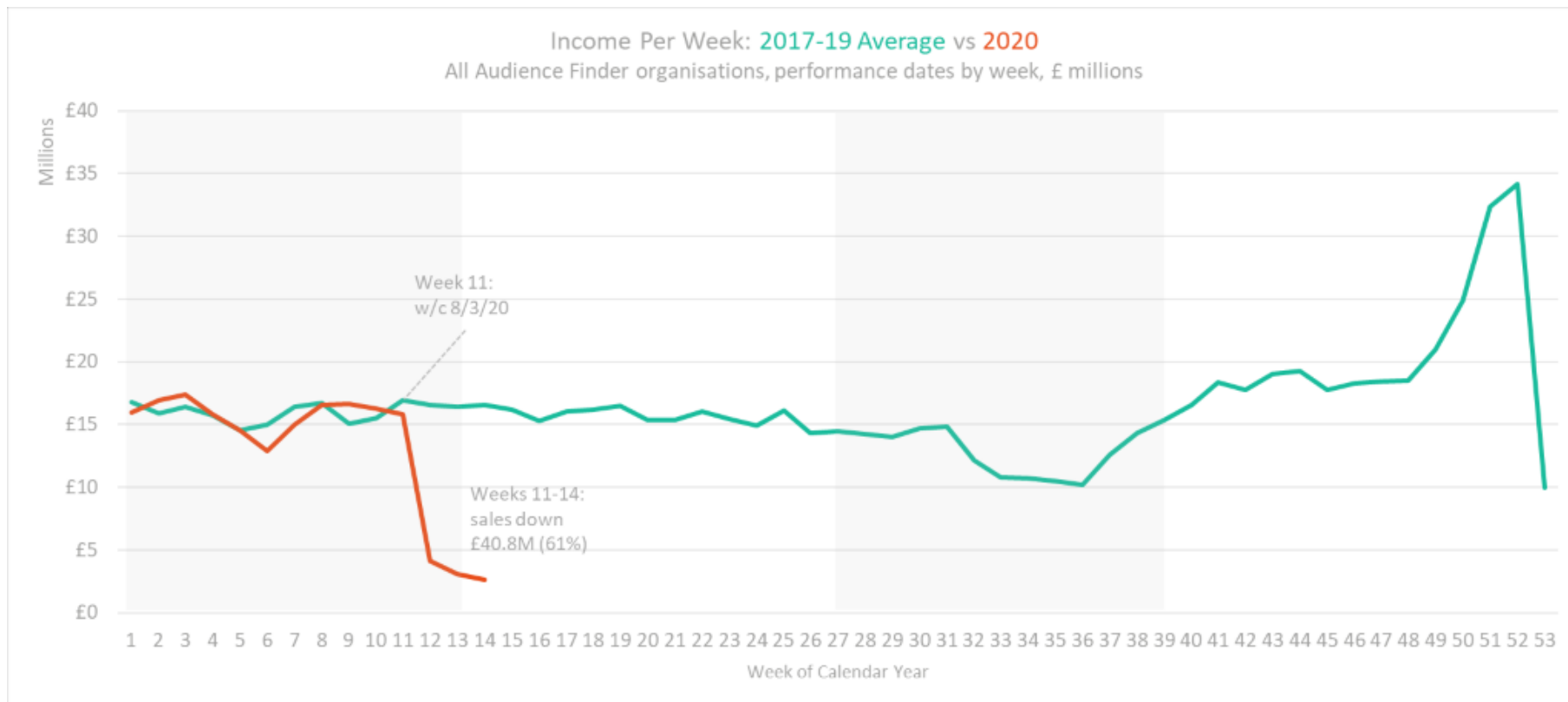
Area and art form) as well as sales in 2020 compared to that benchmark.

Key Findings

- **Substantial drops in income for venues in Audience Finder are already starkly evident:** £83M overall and £48M for NPOs, between weeks 11-14 of the year (w/c 8/3/20 onwards). This is already equivalent to 1.8M unsold tickets overall, with £14M losses in the most recent week alone (week 14; w/c 29/3).
- **Sales vary substantially throughout the year.** How long the closure of venues continues will make substantial differences to venues' income, not only based on the total length of time (at £16.4M income per week on average), but also on the time of year covered. The four quarters of the year account for 24%, 24%, 20% and 31% respectively: **weekly sales grow nearly every week from the beginning of September to the end of the year** (when they are 3.4 times the sales at the end of August). If venues are still closed in the autumn, their financial challenges will accelerate quickly.
- Weeks 49 onwards (approximately covering **December**) **accounts for 14% of the year's sales.** Missing those sales would be a particular blow to many venues (notably panto season). 'Christmas Shows' account for £63.4M of sales each year, 7% of total sales. There are a further £20M of Dance sales between December and February, equivalent to 34% of that artform's annual sales. The Christmas sales peak is due in particular to larger bookings (due to Christmas Shows). This is also when middle- and lower-engaged groups are more likely to attend.
- **There is lots of variety in the specific patterns of sales for different organisations, Areas, art forms and audience types** (e.g. while venues' overall activity is reduced during the high summer, this is less strongly the case for music and musical theatre, and in London and the South).

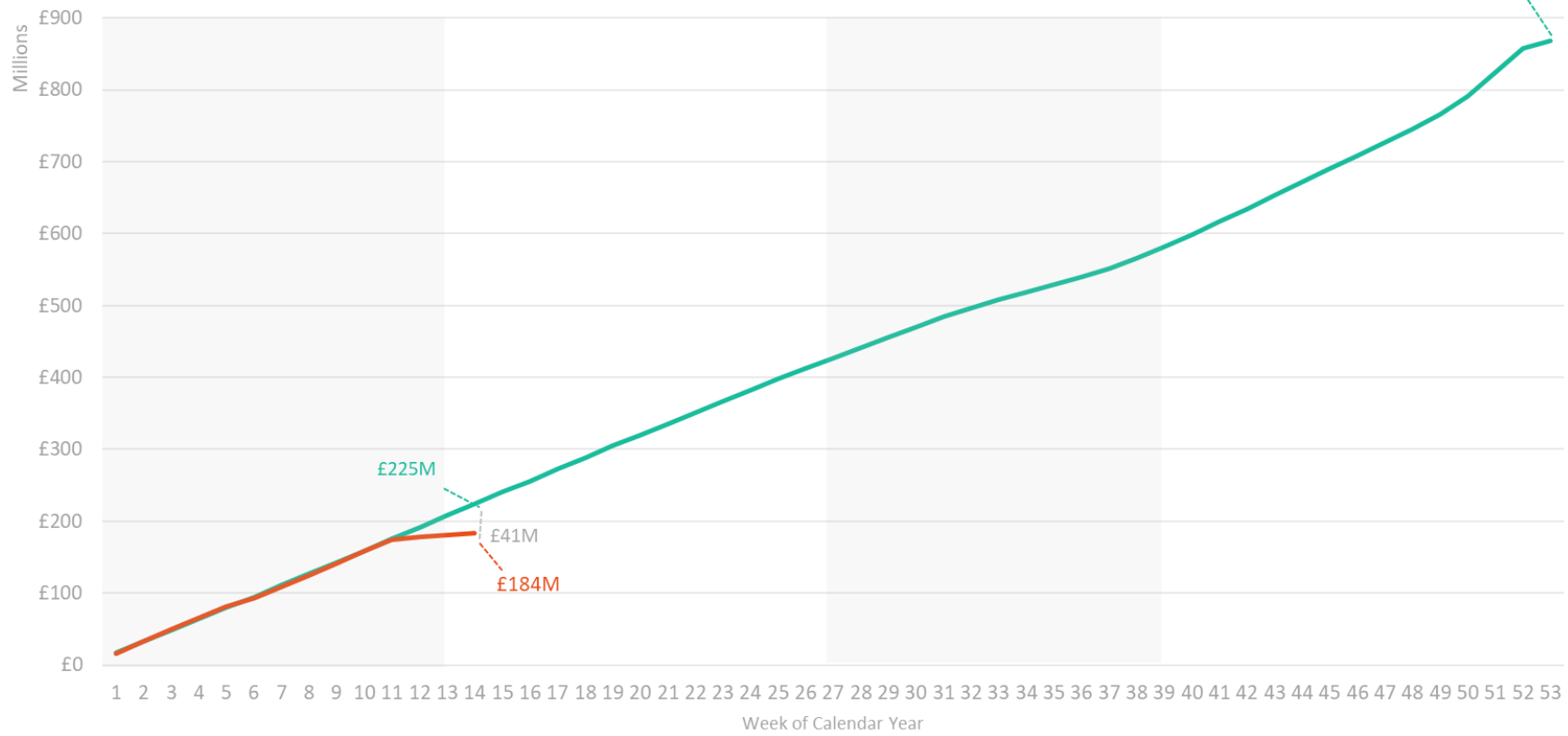
1. Income per week (overall and by art form, inc. cumulative overall)

2020 started like a normal year, but then had a sharp drop off after w/c 8th March. Within three weeks, there was £40.8M of forgone income that would have been expected in a normal year.



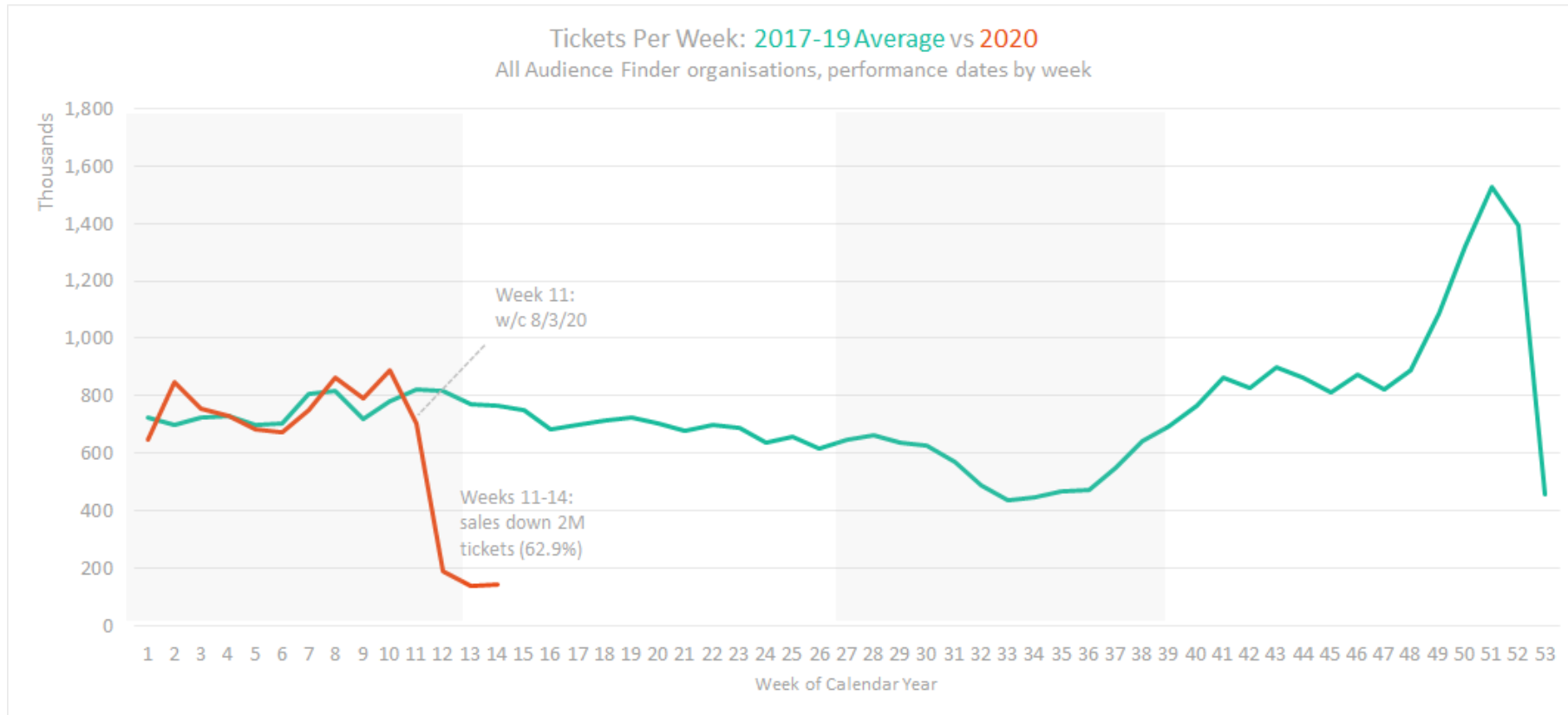
This has already made an appreciable dent in cumulative sales for the year (which would usually total at £868M: for now only £184M has been secured and there is already a £41M shortfall on expectations at this point, which will only grow as venues stay closed).

Cumulative Income Per Week: 2017-19 Average vs 2020
All Audience Finder organisations, performance dates by week, £ millions

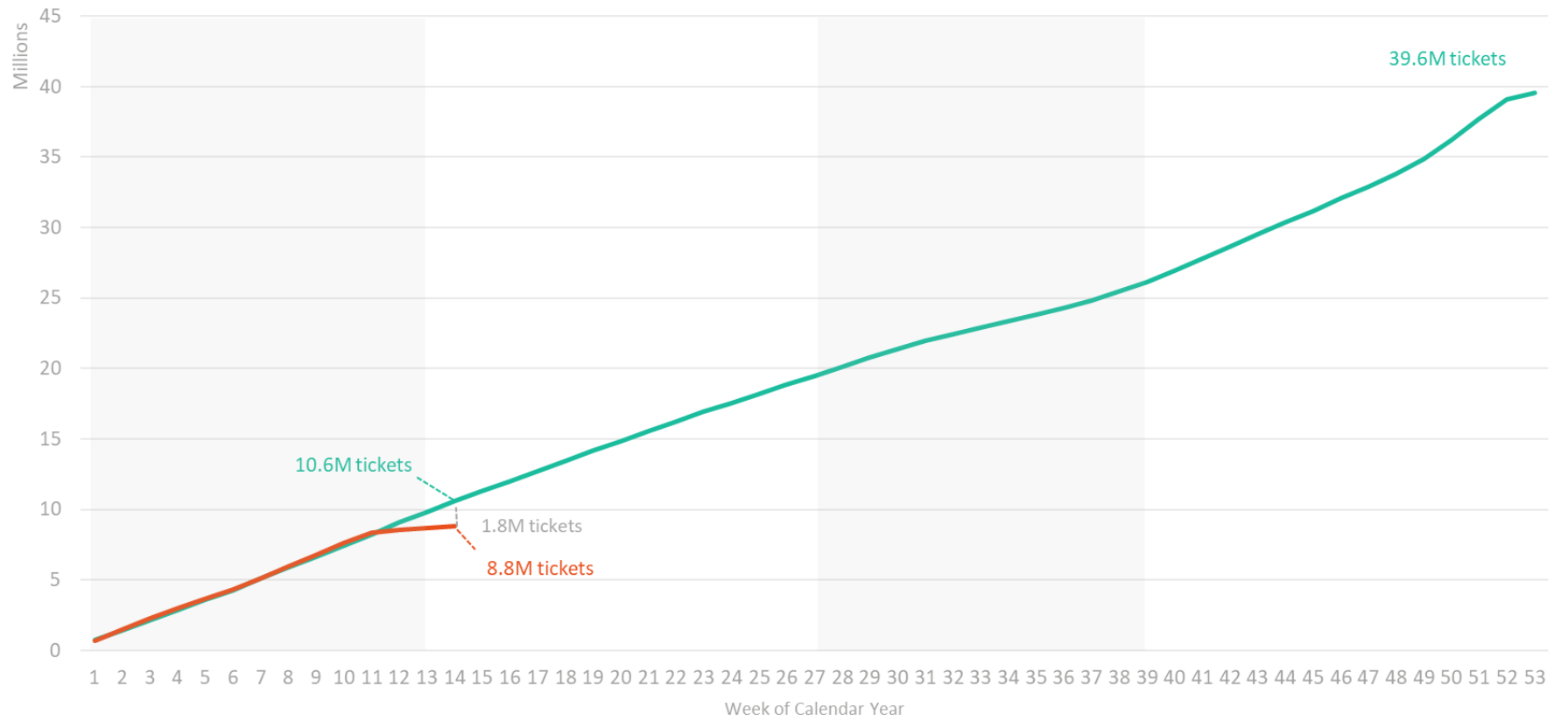


2. Tickets per week

This paints a similar picture, with tickets for the year one million down (more over the last few weeks, having had a strong starter start than usual):

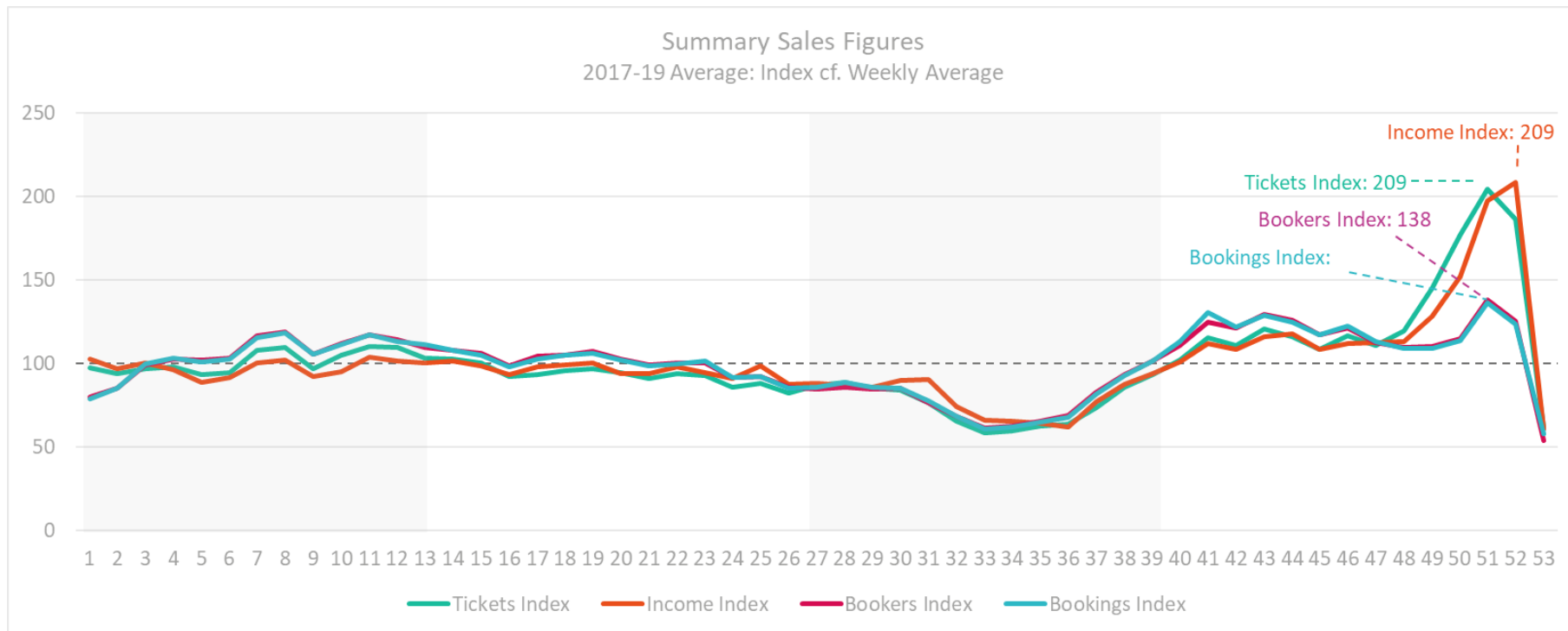


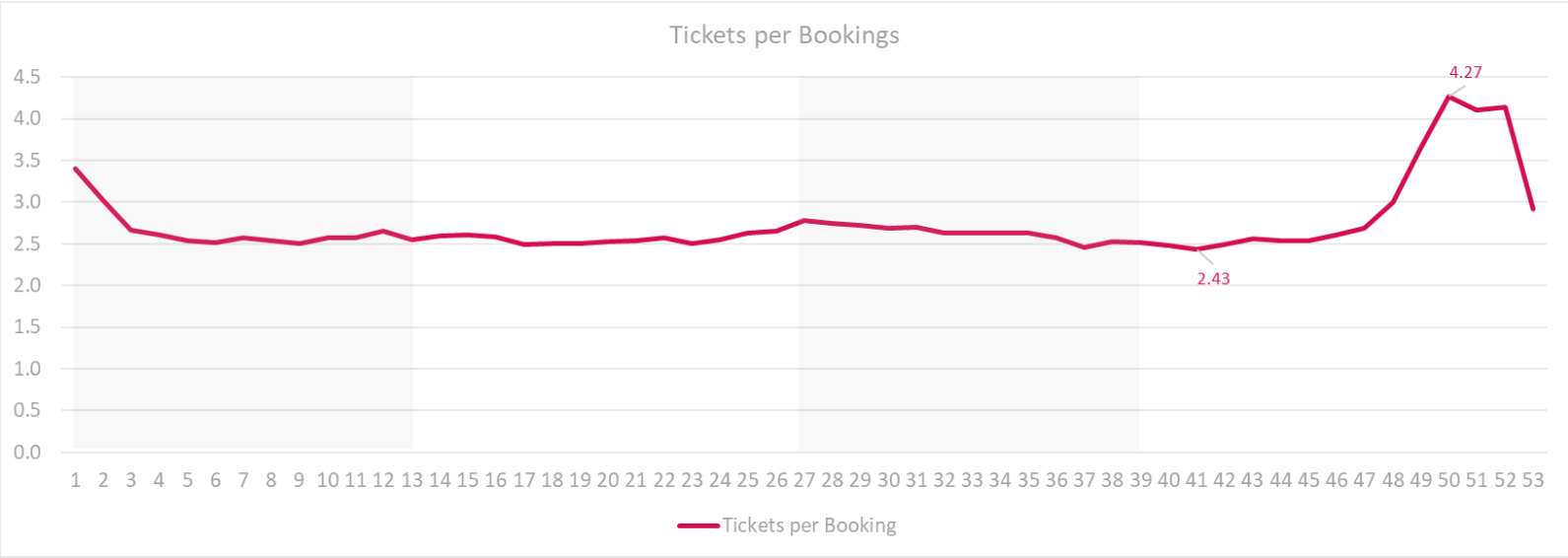
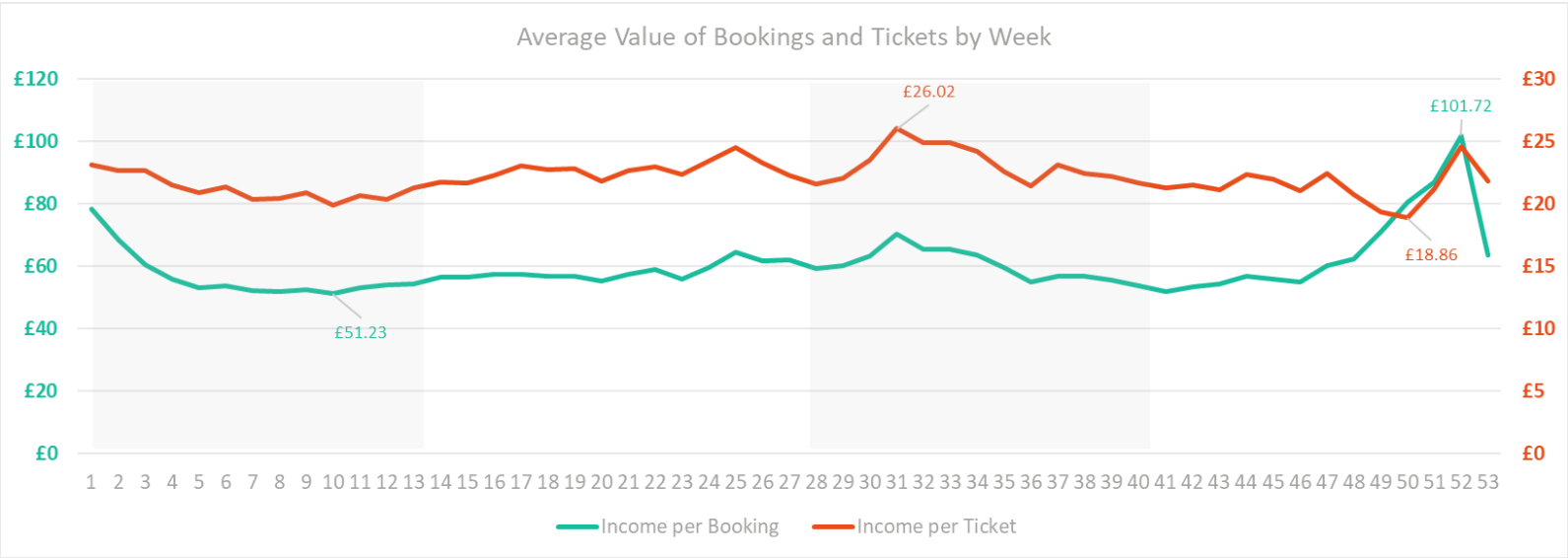
Cumulative Tickets Per Week: 2017-19 Average vs 2020
All Audience Finder organisations, performance dates by week



3. Summary of the 'theatre year'

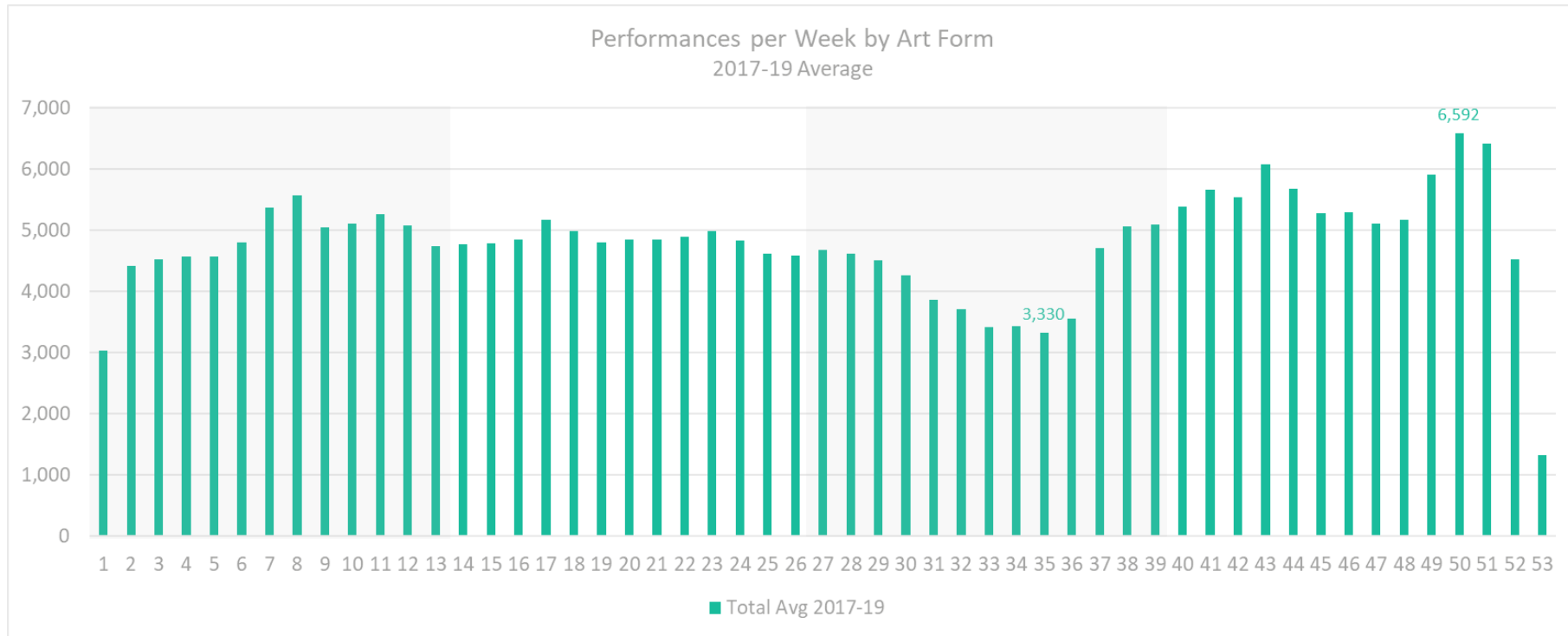
In a typical year, sales drop over the summer, are a bit above average for the autumn and then peak over Christmas. This latter peak is due in particular to larger bookings (with a value double those of the low point in early October), rather than more or higher priced tickets included (due to Christmas Shows). Venues' activity is reduced during the high summer (but are not zero and this is when average ticket prices are in fact highest), but each week of closure from September onwards is particularly, and increasingly, costly.



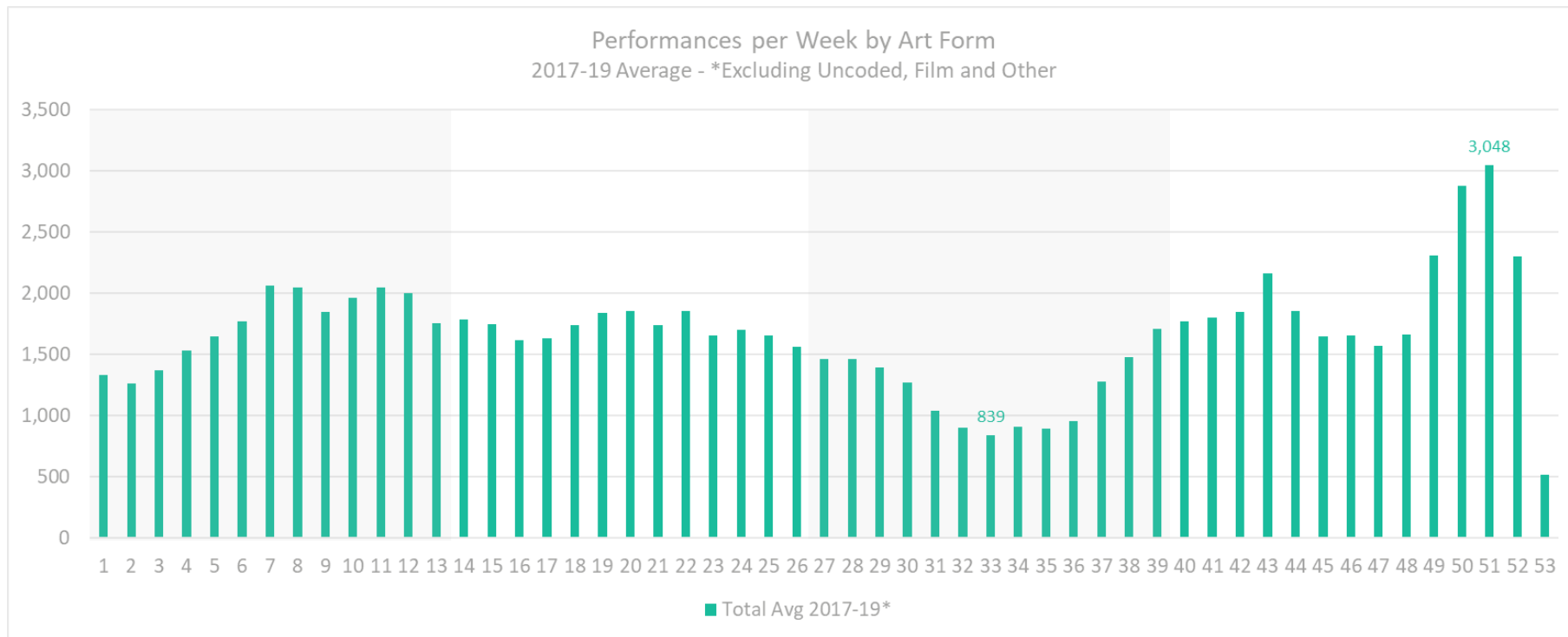


4. The number of performances per week overall and by art form

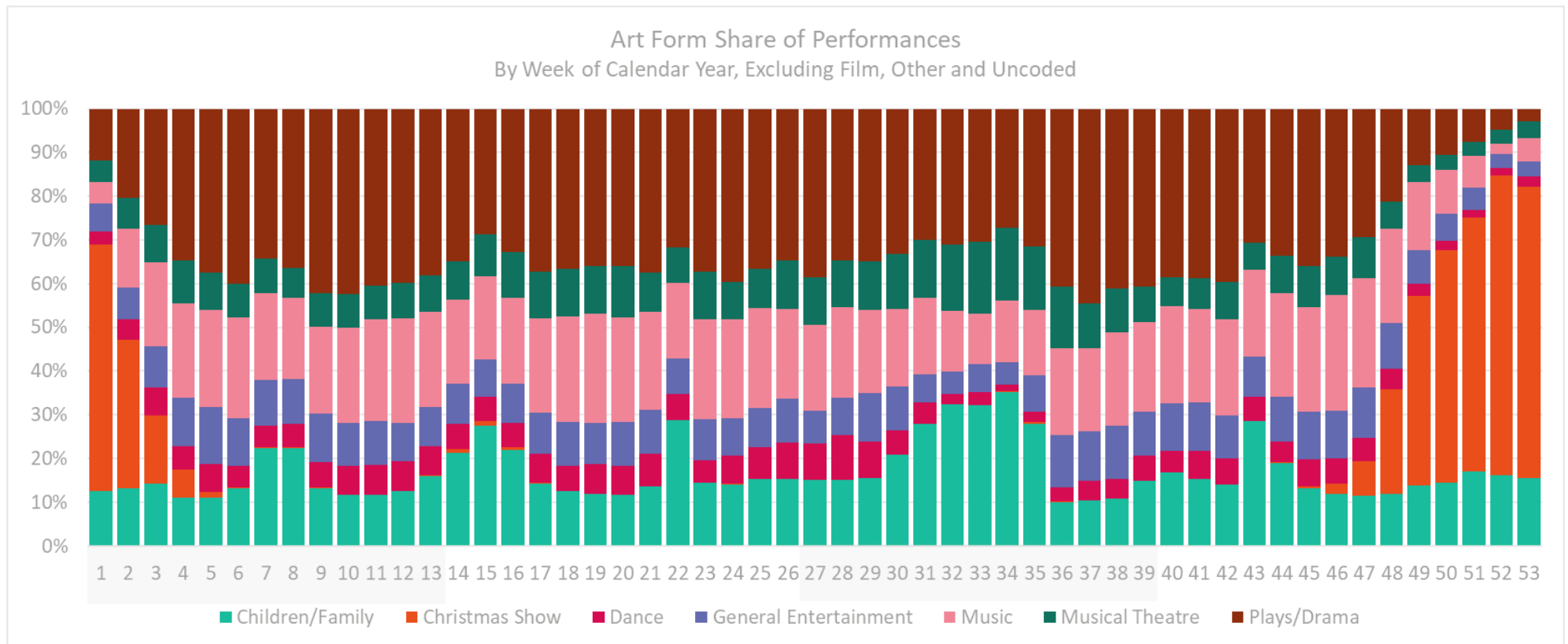
The number of performances follows a similar shape to the number of sales:



This is perhaps clearer when particular categories (film, other and uncoded) are excluded:

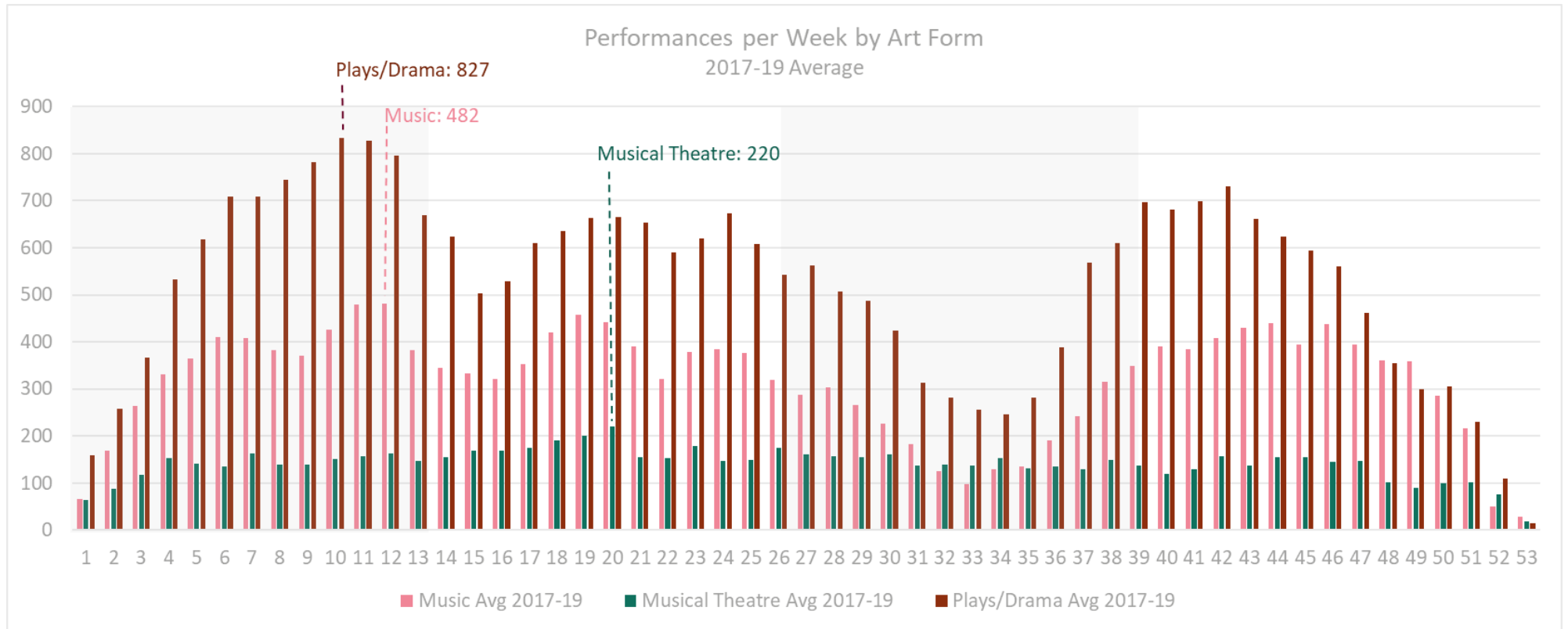


The proportion of different art forms (and hence organisations and audiences likely to be affected most by closure at different points) vary considerably:

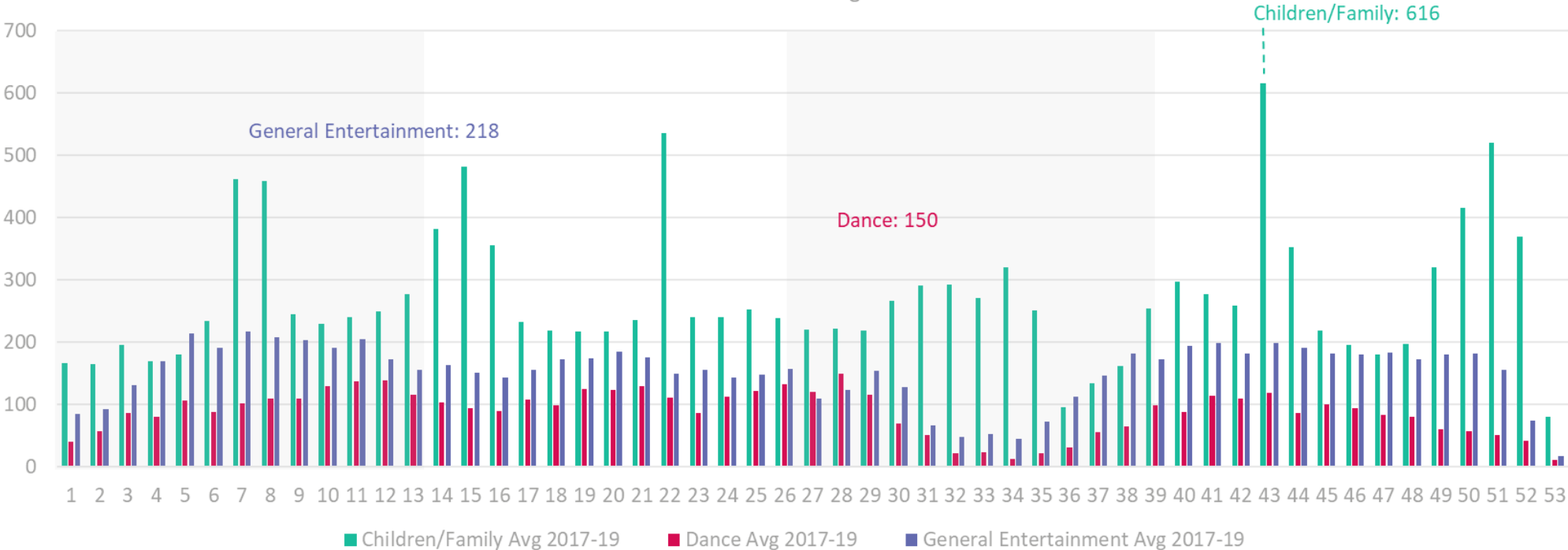


Art Form	Highest week	Proportion
Children/Family	34	35.2%
Christmas Show	52	68.6%
Dance	28	10.2%
General Entertainment	38	12.3%
Music	46	26.5%
Musical Theatre	34	16.7%
Plays/Drama	37	44.5%

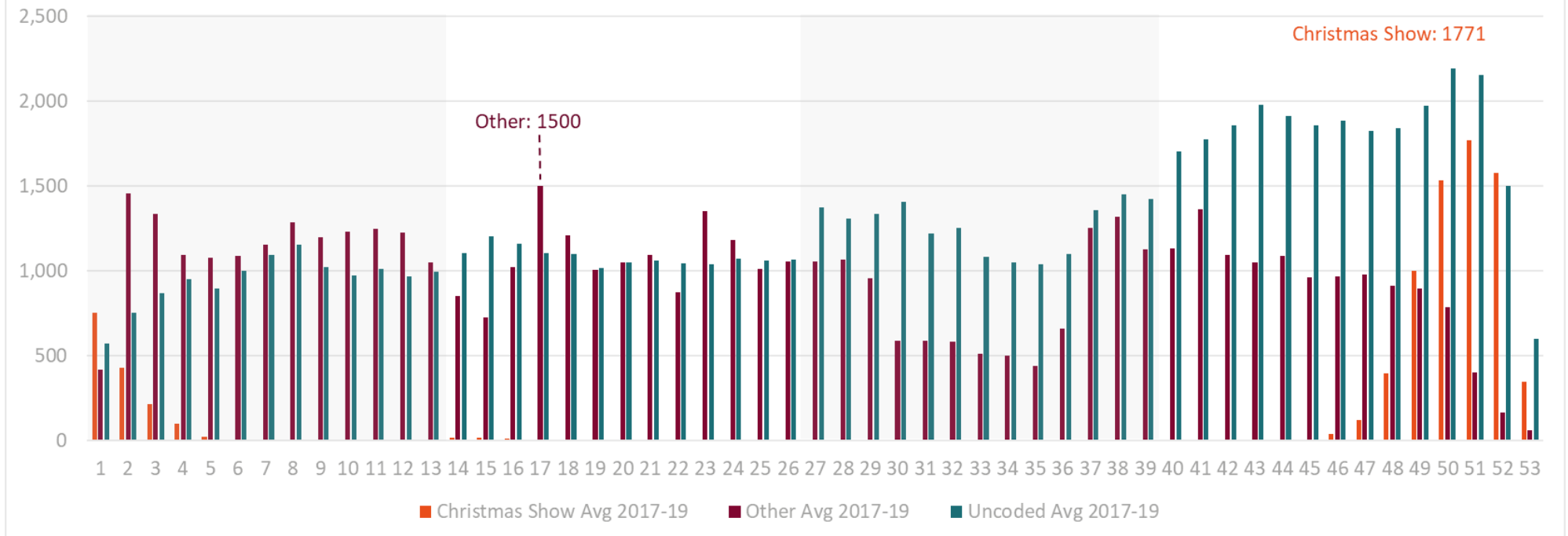
The distribution of performances by art form by week can be seen in the following charts. In particular, note the variability of music and, especially, plays/drama - as well as the concentration of children/family events to coincide with half terms, holidays etc.



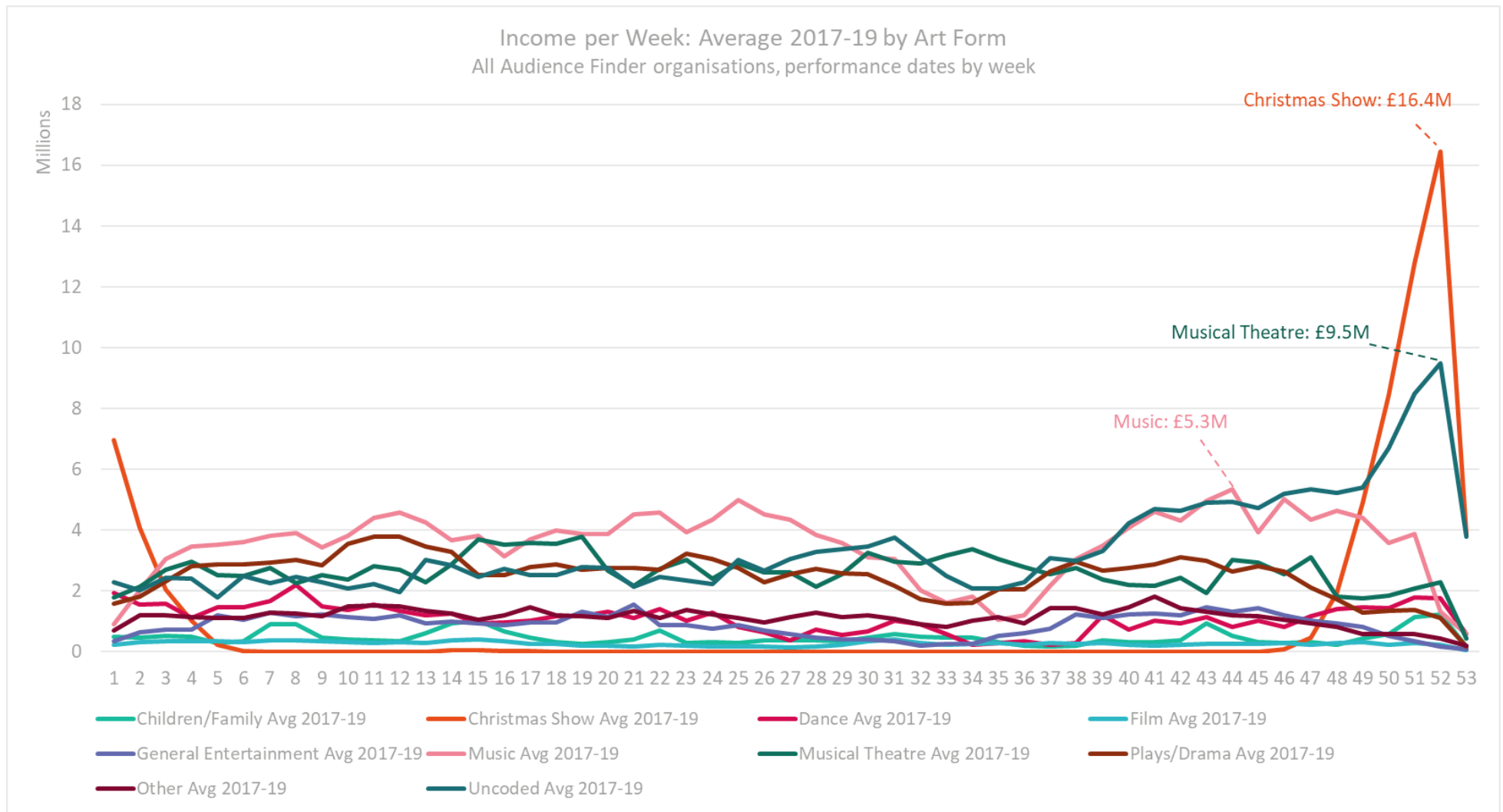
Performances per Week by Art Form
2017-19 Average



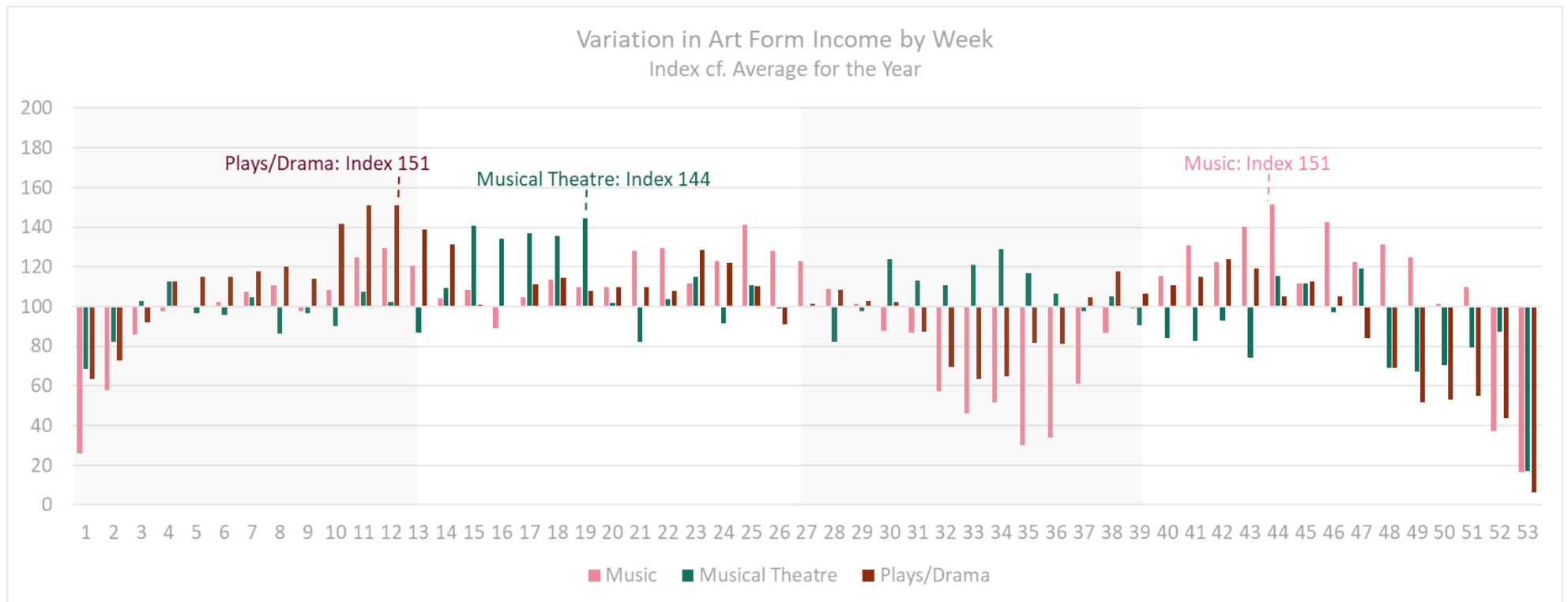
Performances per Week by Art Form
2017-19 Average



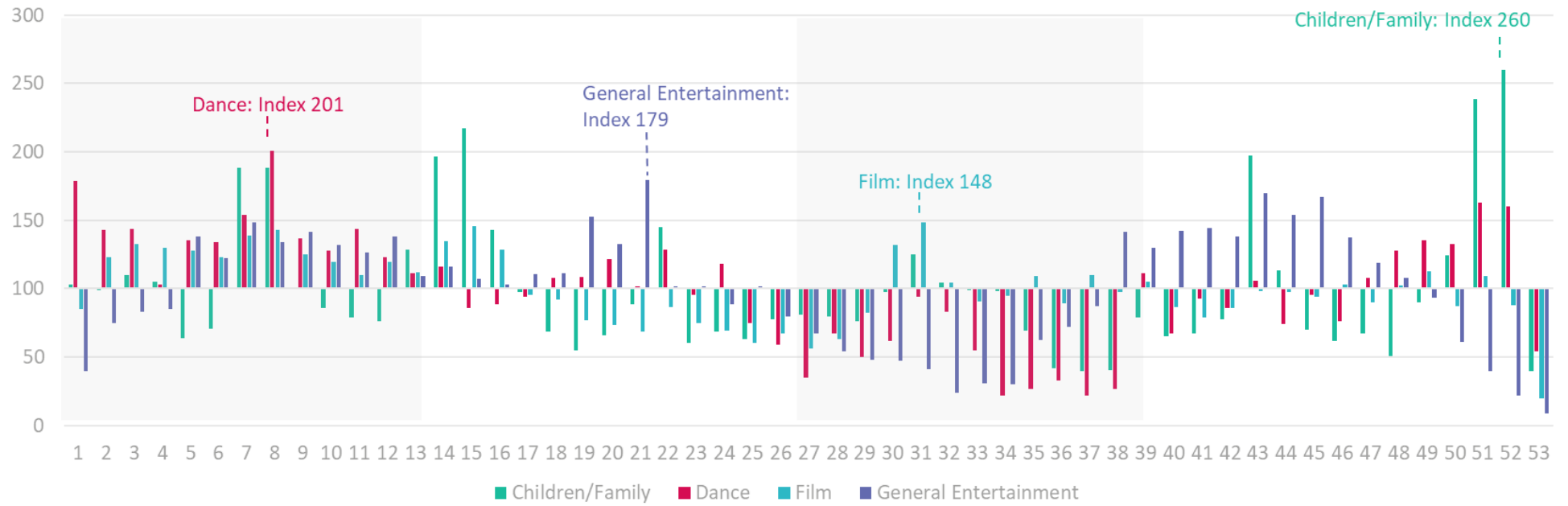
This also aligns with art form income per week:



We can also show when each art form earns more or less than in an average week, to highlight the sets of weeks they are particularly dependant on (and hence the implications of closure for particular weeks):

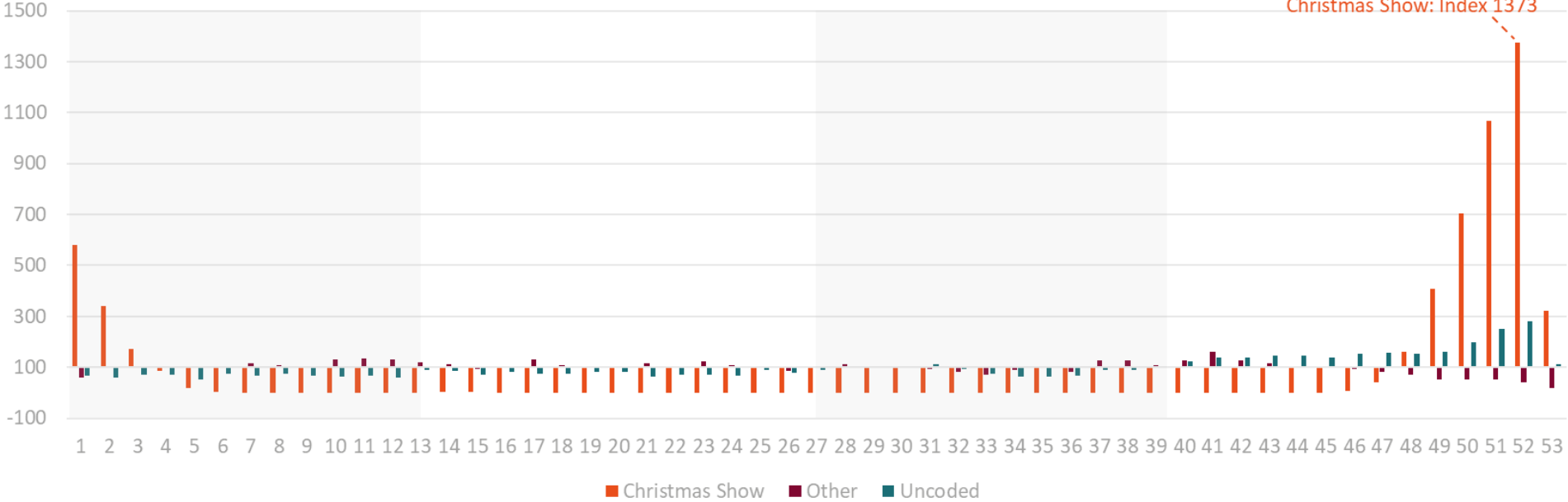


Variation in Art Form Income by Week
Index cf. Average for the Year



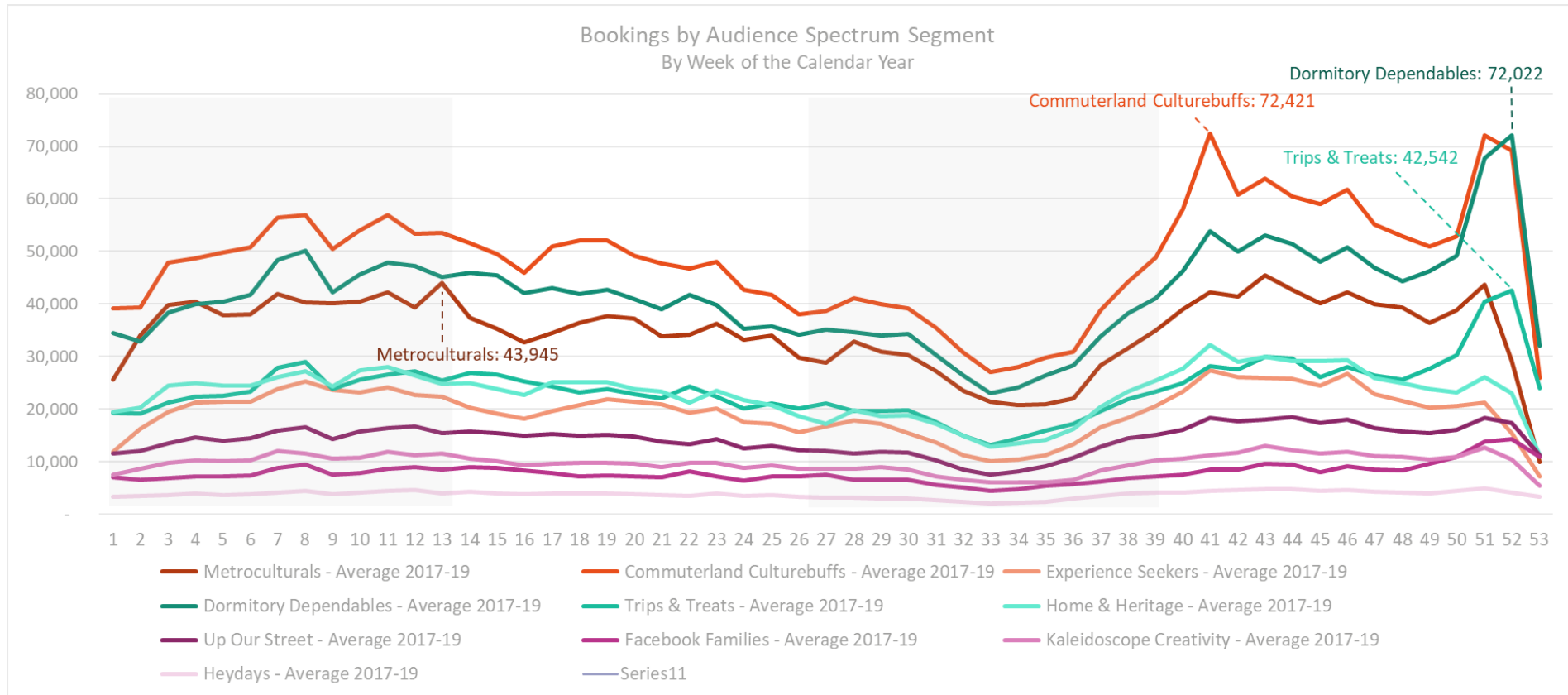
Variation in Art Form Income by Week
Index cf. Average for the Year

Christmas Show: Index 1373



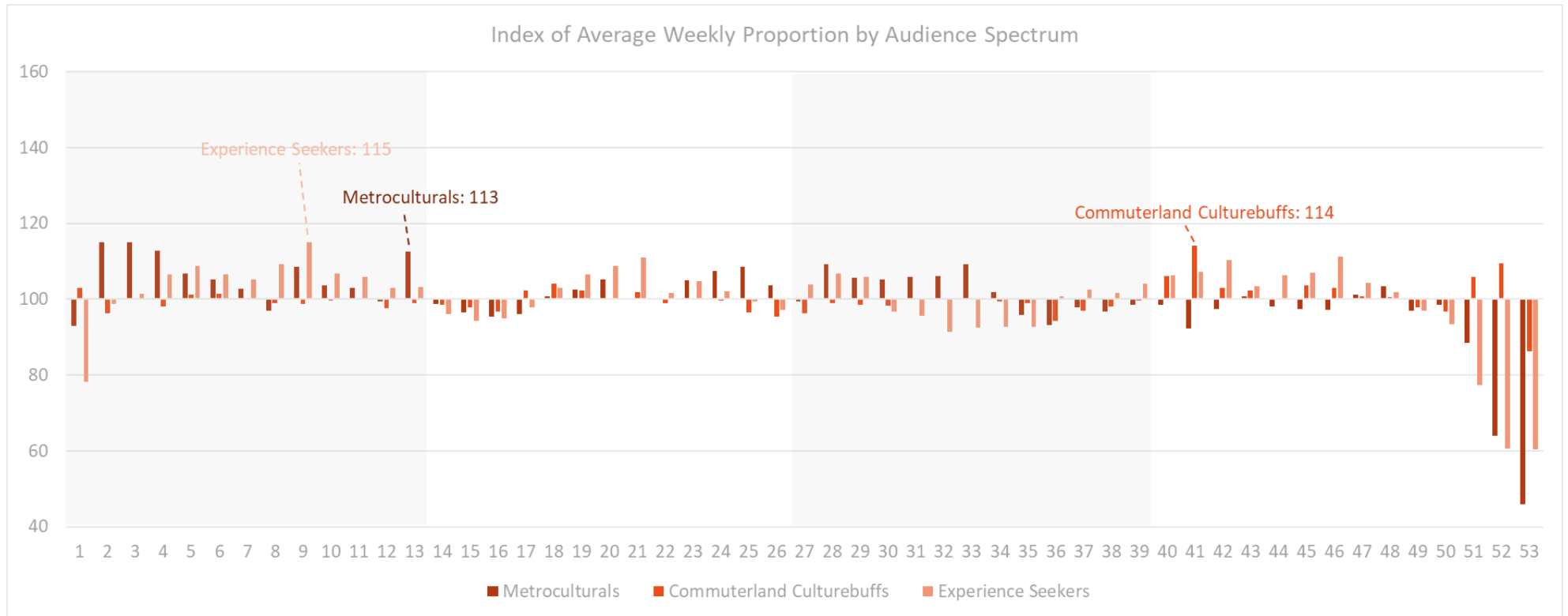
5. Audience Spectrum profile by week

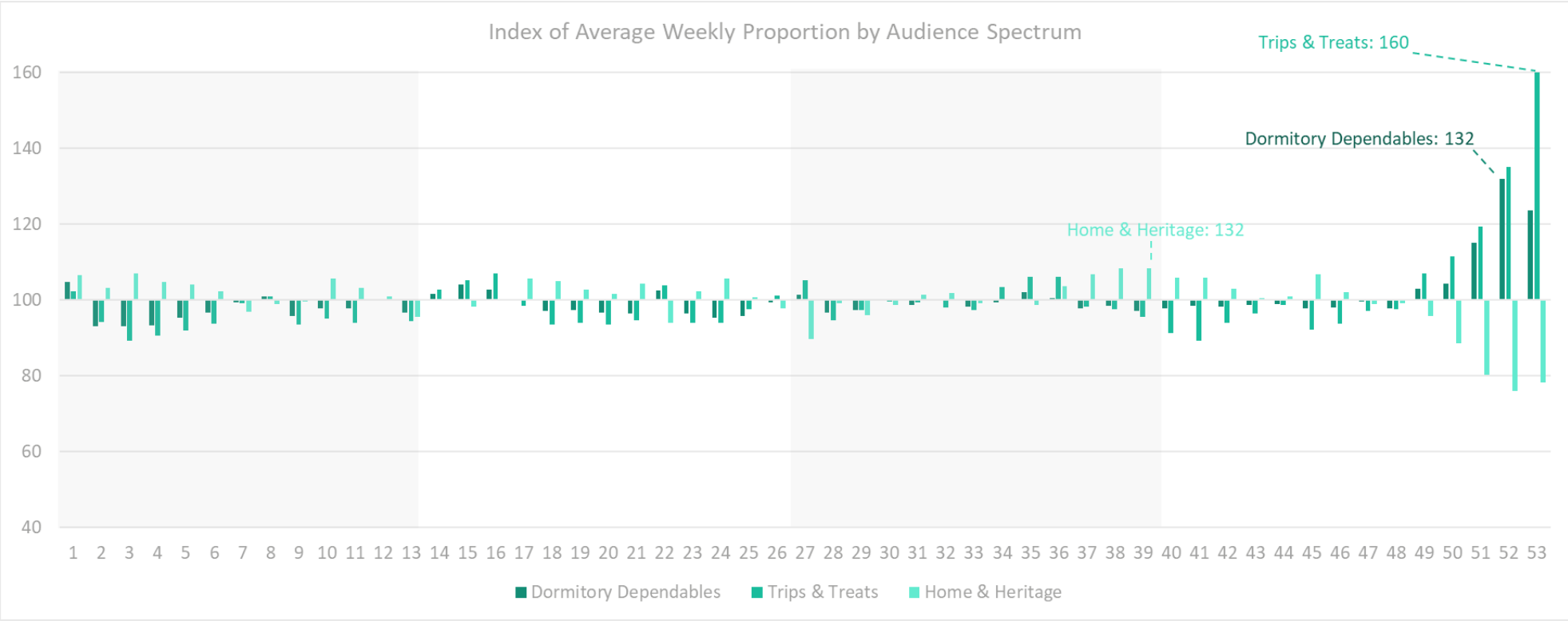
Different Audience Spectrum segments, in general, follow the same rank order for sales throughout the year (with some exceptions visible below: note that the colour scheme shows orange/higher¹, green/medium, purple/lower engaged):

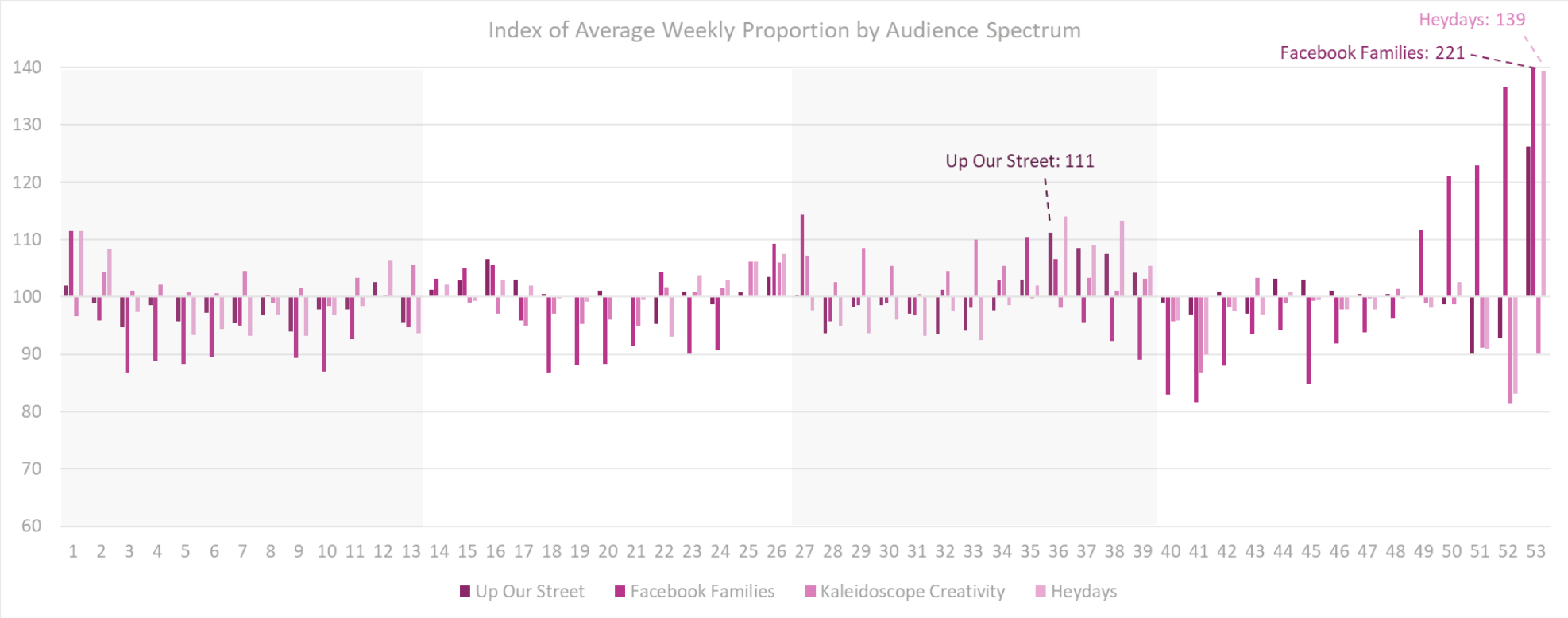


¹ That is, those with higher arts consumption overall (per individual): ticketed events appeal more to some groups more than others, and groups are different sizes, so the orange/higher segments aren't all at the top.

Splitting this out to show when each type is more or less likely to attend shows a clear picture, with higher engaged groups in May/July/October, middle engaged groups particularly up at Christmas (except Home and Heritage, who run counter to the other middle-engaged groups throughout the year), and lower engaged groups relatively highest at Easter, summer and Christmas (and strongly down in October).

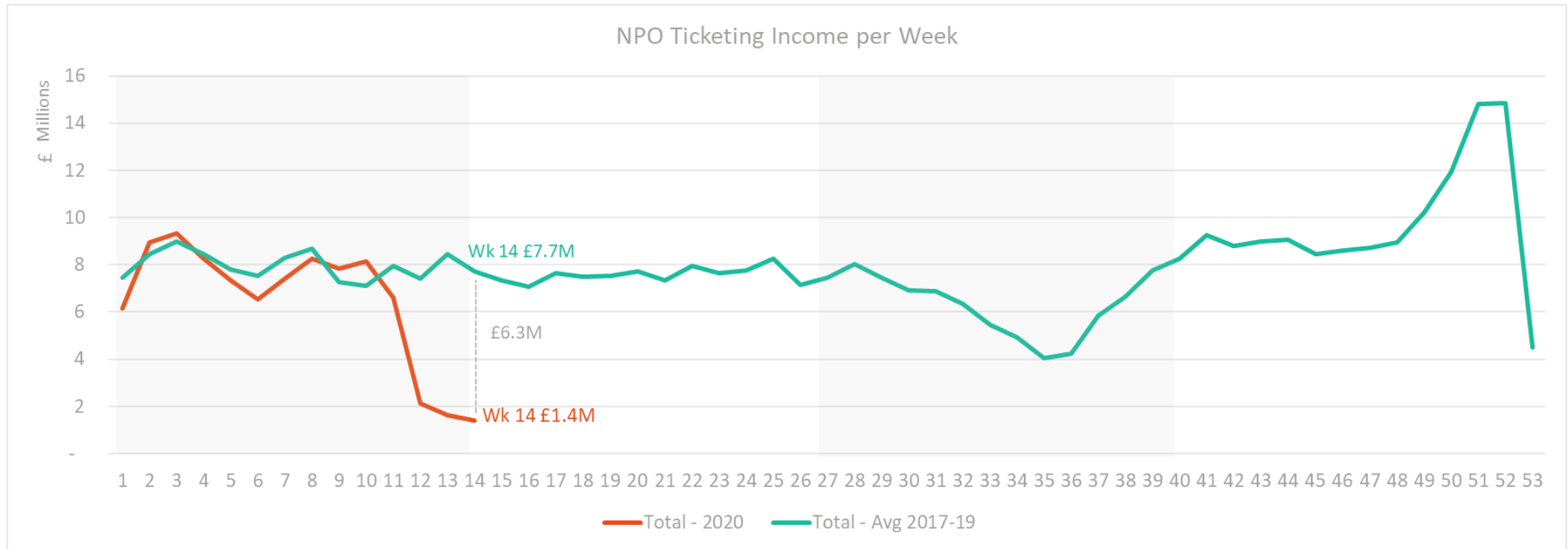






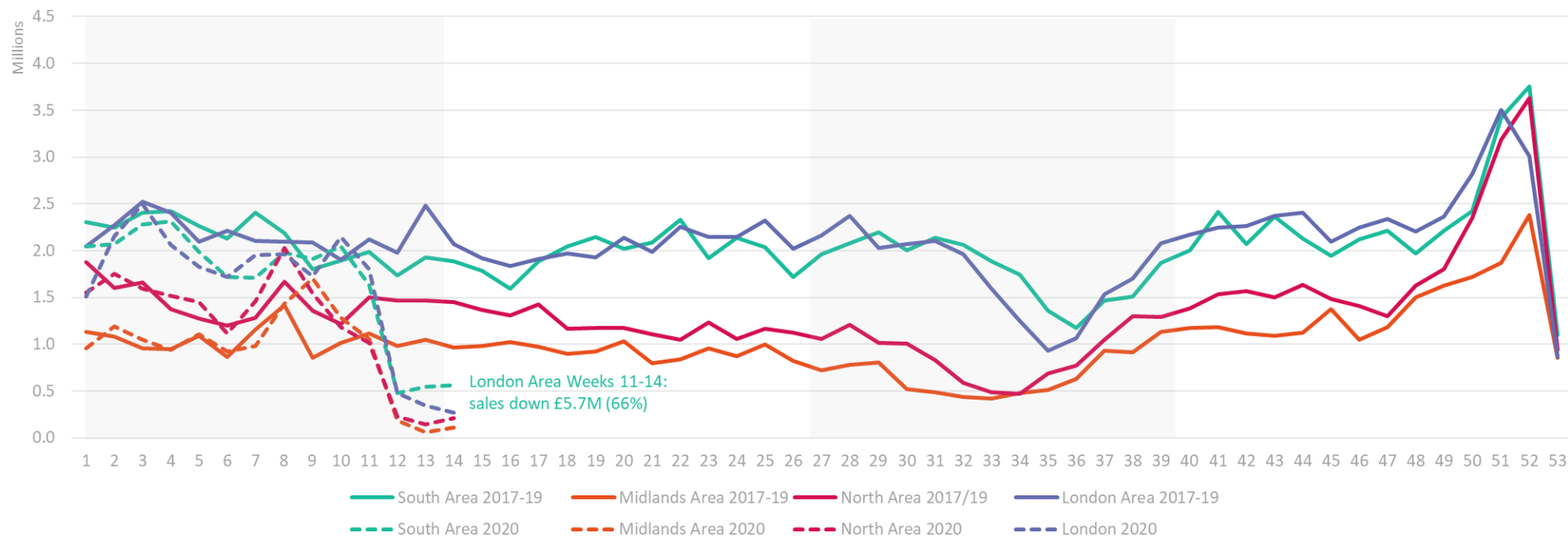
6. Sales by Arts Council England (ACE) National Portfolio Organisations (NPOs)

NPO sales have followed a similar pattern to overall, but have fallen even more sharply, with £34M of lost income from weeks 11-14, 74% down on average):



Sales are highest in the South and London, which are therefore losing most income compared to usual, but all are following the same pattern:

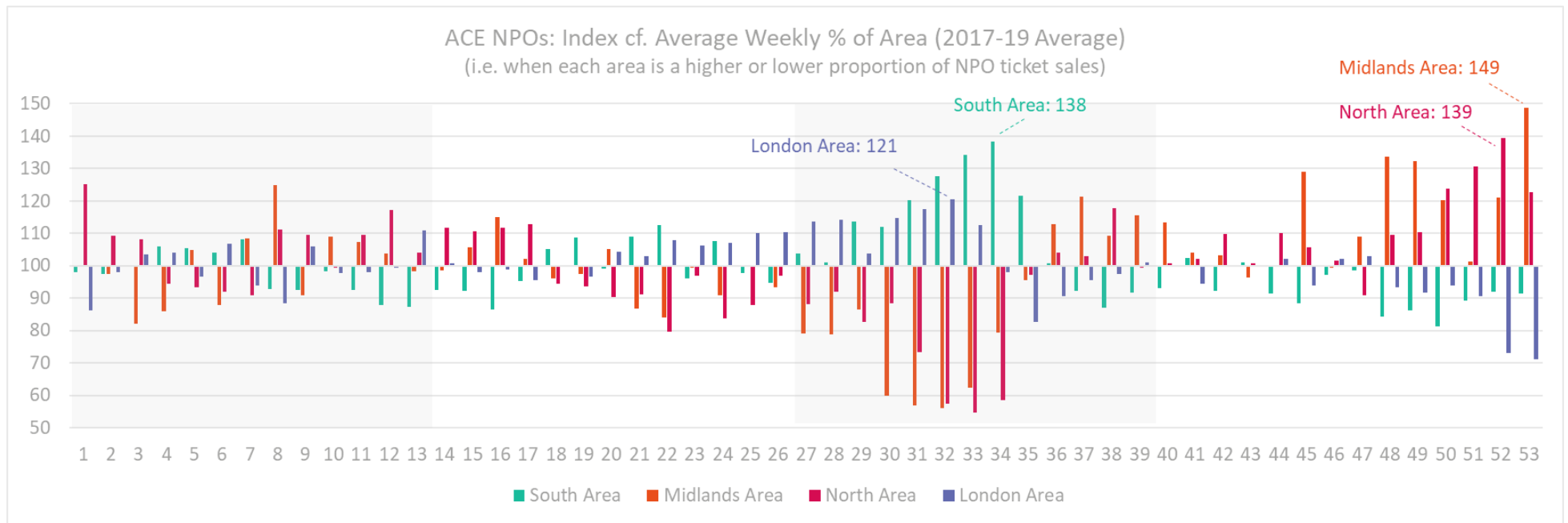
Ticketing Income 2020 cf. Average of 2017-19, by ACE Area



Income per Quarter by Area (Avg 2017-19)				
£M	South	Midlands	North	London
Q1	27.7	13.7	19.0	28.3
Q2	25.6	12.1	15.8	26.6
Q3	23.4	8.8	11.8	22.9
Q4	32.1	19.2	25.3	32.9

Income per Quarter by Area				
%	South	Midlands	North	London
Q1	31.3	15.4	21.4	31.9
Q2	31.9	15.1	19.7	33.2
Q3	35.1	13.1	17.6	34.2
Q4	29.3	17.6	23.1	30.0

London and the South disproportionately earn ticket income during the Summer, the Midlands and North around Christmas:



Background and Methodology

This report draws on data from Audience Finder (see next section) presented as an average of the 2017-2019 calendar years as a comparator (unless stated) and data to date for 2020. Most of the report is based on all ticketing data in Audience Finder for those years, but there are specific spotlights on Arts Council England National Portfolio Organisations (NPOs), both overall and split by Area (North, South, Midlands and London). Venues provide artform codes (from a standard list) for their events: these have been used to compare sales by artform. There is also analysis by audience profile, using Audience Spectrum (see About Audience Spectrum).

Where ‘quarters’ are referred to, these are based on weeks 1-13, 14-26, 27-40 and 41-53 (week 53 being a partial week). Dates refer to the dates of performances (rather than sales) and geography to the location of bookers (rather than venues/performances). Please note that the Audience Finder dataset is dynamic, so some figures may later change (e.g. as new venues join, including the import of past years’ sales data).

We have overall sales figures to a more recent date than art form coding, so we cannot yet show 2020 art form splits. Art form coding process also included ‘exclusions’ of ‘performances’ that venues don’t want included (e.g. if they are on behalf of other organisations, or are non-event sales put through the box office): there is a moderate ‘settling’ of figures once this happens, but top line figures should be indicative.

Further analysis will be done in time: requests and suggestions are welcome to oliver.mantell@theaudienceagency.org.

The Audience Agency

Is a sector support organisation and national charity supporting the cultural sector and creative industries to increase their reach, resilience and relevance. The Audience Agency offers specialist audience and policy research, strategic advice and support in organisational, digital and audience development. We are funded by Arts Council England, Arts Council Wales and Creative Scotland to provide the UK Audience Finder programme aggregating audience data from over 800 cultural organisations and supporting them to use evidence and insight to become more audience centred.

About Audience Finder

Audience Finder is a national audience development and data aggregation programme, enabling cultural organisations to share, compare and apply insight. It is developed and managed by The Audience Agency for and with the cultural sector and is funded by the National Lottery through Arts Council England. Audience Finder provides tools for collecting and analysing data in a standardised way which builds a clear picture of audiences locally and nationally. The results help organisations to find new audience opportunities using a range of tools, features and support. These include user-friendly reporting dashboards, online mapping and insight tools and the opportunity to work in collaborative, data-sharing groups. Audience Finder brings together data on all UK households with data from over 800 cultural organisations: over 170 million tickets, 59 million transactions, approximately 750,000 surveys and web analytics from all the UK's major arts and cultural organisations.

About Audience Spectrum

Audience Spectrum segments the whole UK population by their attitudes towards culture, and by what they like to see and do. There are 10 different Audience Spectrum profiles that you can use to understand who lives in your local area, what your current audiences are like, and what you could do to build new ones. Audience Spectrum is the most accurate tool the sector has ever had to help target audiences and include a wider public. Analysis and customer tagging with Audience Spectrum work at both household and postcode levels, to help cultural organisations understand audience profile and reach, enabling really accurate targeting of activity and communications.

Find Out More

About this Report

For more information about this report, contact: oliver.mantell@theaudieceagency.org, or visit our Covid19 Resource hub: <https://www.theaudienceagency.org/resources/covid-hub>

General Enquiries

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The Audience Agency is funded by the Arts Council, as a Sector Support Organisation, to lead on supporting cultural organisations to gain a deeper understanding of current and potential audiences.

Disclaimer

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The Audience Agency's services also involve models and techniques based on statistical analysis, probability and predictive behaviour. Accordingly, The Audience Agency is not able to accept any liability for any inaccuracy, incompleteness or other error in this report.