Creative Scotland

2022 Audience Recover Report

From Audience Finder

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Key Findings

Sales

- Scottish arts & culture venues have experienced a slower recovery from the pandemic than English venues, due to the population profile (older, more rural) and the Covid restrictions affecting venues still in place into the start of 2022.
- Ticket sales were down by a third in 2022, compared to pre-pandemic, and 22% fewer bookers attended. The drop was felt more by venues in South Scotland and along the West coast. Particularly, the Highlands and & Islands already had the smallest market share and saw the largest drop.

Profile

- The profile of attenders is likely to be shifting – with younger people and families attending more than older groups and suburban, traditionally 'dependable' audience groups.

Geography

- The audience to Scottish venues has historically been particularly local and remains as such in 2022. Ticket sales in the summer period Jul-Sep came more from within Scotland than they had done on average pre-pandemic, with the biggest drop in UK visitors coming from London and the South of England, suggesting that some visitors to the festivals might not want to travel as far.

Sectors and Art Forms

- Music has grown as a proportion of tickets sold, while Christmas Shows and Film have decreased.
- The drop in ticket sales may have been in part linked to fewer performances being put on, compared to pre-pandemic.

Methodology

This report is based on Audience Finder ticketing data, from arts & cultural venues in Scotland. Bookers represent unique households and tickets are all types of tickets issued including zero value tickets.

Regions used are those defined by Creative Scotland, and analysis from the regions is based on bookers living in those regions booking to venues anywhere, rather than just those based in that region. This provides a fuller picture when some regions have very few Audience Finder contributing venues. From our local events analysis in Scotland, we have found that bookers tend to book very locally, so our analysis found that restricting data to just within Scotland rather than booking anywhere made little difference to results. As a result, we have included UK-wide data for Scottish audiences, since it gives a fuller, if little different, picture.

As this is a follow-up report from the Baseline report completed in 2021 on pre-pandemic data, we looked at ticketing data from 2022 to examine the post-lockdown trends happening in Scotland. Data was taken from all Scottish organisations contributing data in this year (list below). Charts including the 2017-19 profiles in this section are taken directly from the baseline report, so are based on fewer venues (see table below).

For the change analysis, an average of the calendar years 2017-2019 was compared to the 2022 calendar year. Only organisations who contributed data in all years were included in analysis to show meaningful differences.

Caveats on the data

Some organisations did not have geographical or Audience Spectrum data appended, due to ticketing feed issues. This may skew the data for a region, considering bookers from the region tend to book to local venues.

Some organisations did not have data in 2022, or consistent data in the years 2017-2019, which the pre-pandemic benchmark is set on. This means they could not be included in the analysis of sales changes since the pandemic.

The table below lists all organisations who contributed data, and which parts of the analysis they were included in.

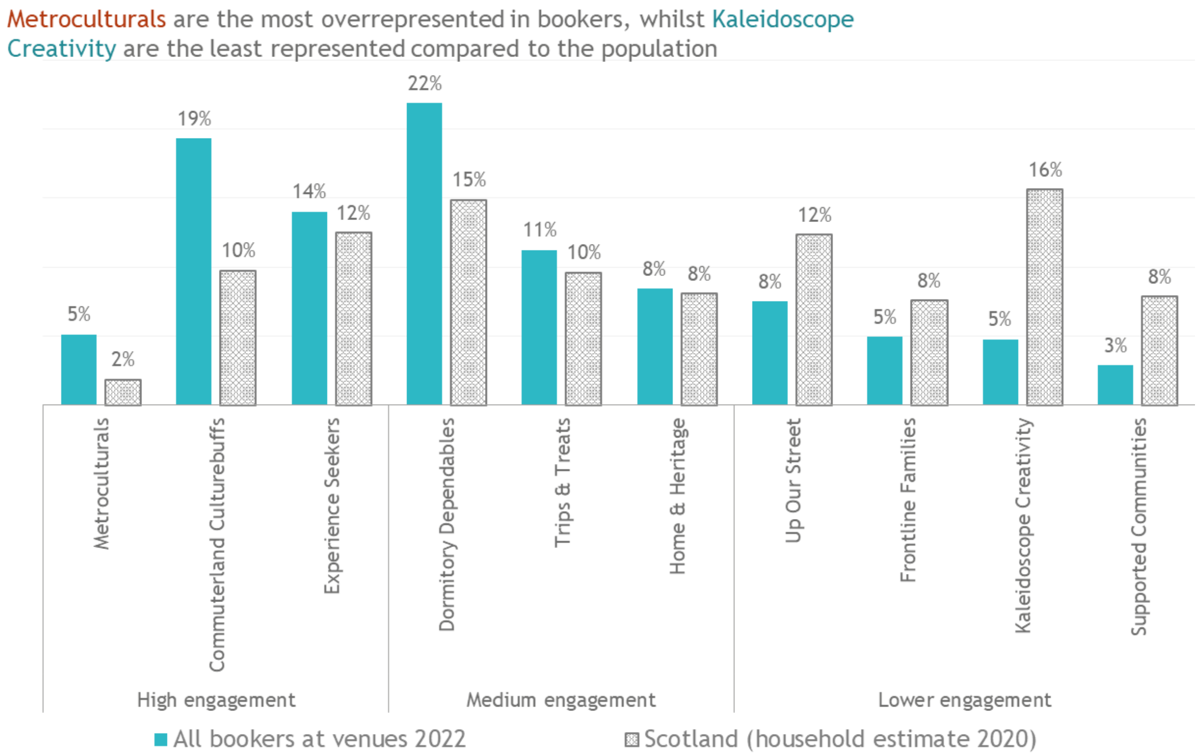
	2022 ticket volume	Data included in the follow analyses:				
Venue	Column1	Benchmark report	2022 overall	2022 AS profile/AS profile by **region**	Change overall - inc. **artform**	**Change by region**
Aberdeen Performing Arts	419,191	-	Yes	Yes	-	-
An Lanntair	7,178	Yes	Yes	Yes	Yes	Yes
Beacon Arts Centre	64,137	Yes	Yes	Yes	Yes	Yes
Capital Theatres	290,961	-	Yes	Yes	Yes	Yes
CCA Glasgow	9,522	Yes	Yes	Yes	Yes	Yes
Citizens Theatre	11,532	Yes	Yes	Yes	Yes	Yes
CMI Scotland	106,165	-	Yes	-	Yes	-
Comar	-	Yes	-	-	-	-
Cumbernauld Theatre	30,363	Yes	Yes	Yes	Yes	Yes
Dance North Scotland	506	-	Yes	Yes	-	-
Dundee Contemporary Arts	73,676	Yes	Yes	Yes	Yes	Yes
Dundee Rep Theatre	35,552	Yes	Yes	Yes	Yes	Yes
Eden Court Highlands	140,121	-	Yes	Yes	-	-
Edinburgh Art Festival	528	-	Yes	Yes	-	-
Edinburgh International Festival	143,336	Yes	Yes	Yes	Yes	Yes
Glasgow Film	-	Yes	-	-	-	-
Glasgow Life	266,961	Yes	Yes	Yes	Yes	Yes
Glasgow Studio Orchestra	555	Yes	Yes	Yes	Yes	Yes
Horsecross Arts	120,514	Yes	Yes	Yes	Yes	Yes
Lyceum Edinburgh	55,762	Yes	Yes	Yes	Yes	Yes
Macrobert Arts Centre	68,122	-	Yes	Yes	Yes	Yes
National Theatre of Scotland	4,666	Yes	Yes	Yes	Yes	Yes
ONFife	73,030	Yes	Yes	Yes	Yes	Yes
Pitlochry Festival Theatre	-	Yes	-	-	-	-
Platform	8,831	Yes	Yes	Yes	Yes	Yes

Royal Conservatoire of Scotland	42,647	Yes	Yes	Yes	Yes	Yes
Shetland Arts	37,445	Yes	Yes	Yes	Yes	Yes
The Barn	6,451	-	Yes	Yes	-	-
The Brunton	70,294	Yes	Yes	Yes	Yes	Yes
The Gaiety Theatre Ayr	51,797	-	Yes	Yes	Yes	Yes
Theatre Royal Dumfries	12,682	Yes	Yes	Yes	-	-
Traverse Theatre	45,752	Yes	Yes	Yes	Yes	Yes
Tron Theatre	29,563	-	Yes	Yes	-	-
Usher Hall	143,452	-	Yes	-	Yes	-
V&A Dundee	20,856	-	Yes	Yes	-	-

2022 Analysis

Overall profile compared to Scotland households

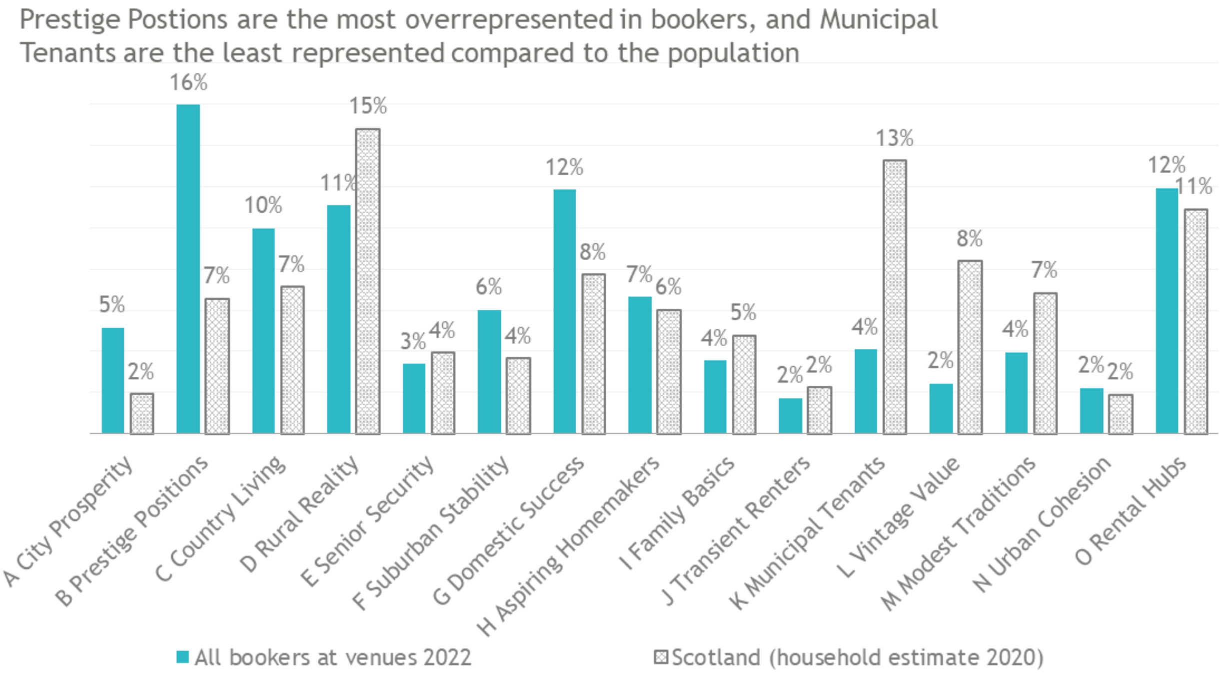
Audience Spectrum



Base: 334,481 / 2,408,661

As is typical across UK-wide booking data, the highest engaged Audience Spectrum segments are overrepresented in Scottish booker data, although Experience Seekers are only slightly overrepresented. Dormitory Dependables, Scotland's second largest segment, is also very dominant in booking data, accounting for 22% of bookers. At the other end of the spectrum, the lower engaged Kaleidoscope Creativity are the largest segment of the population but their booker numbers are only around a third of this, meaning significant underrepresentation.

Mosaic

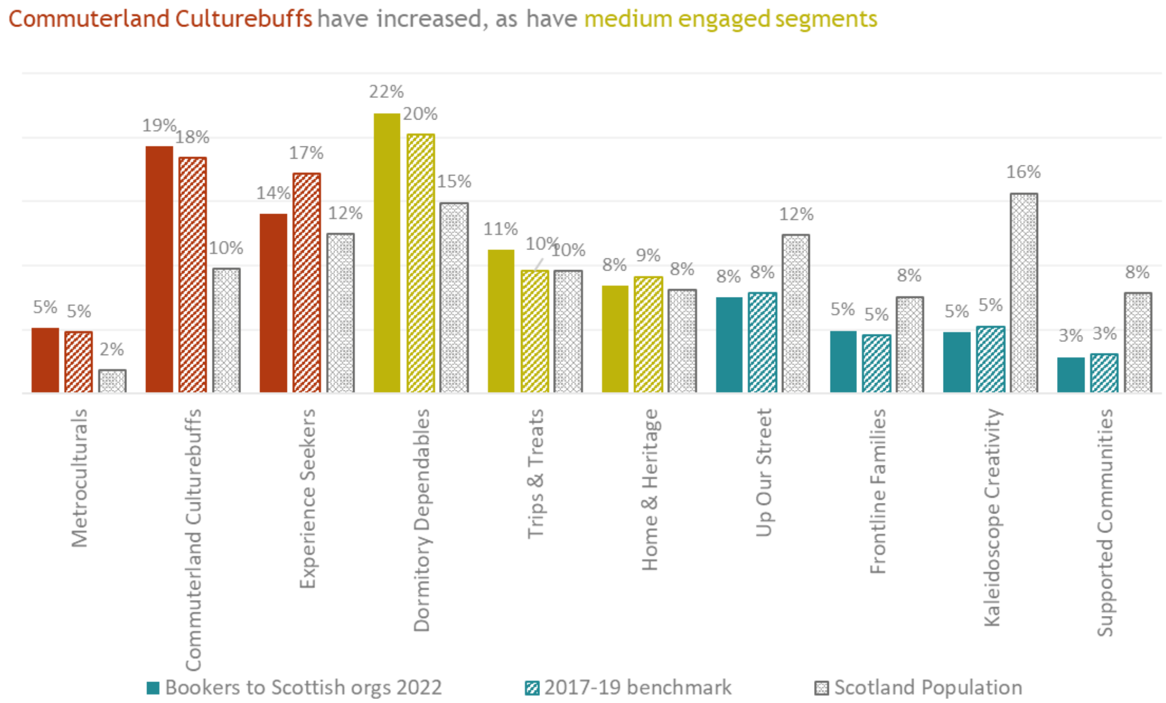


Base: 345,052 / 2,529,342

The Mosaic groups that were underrepresented among bookers by the greatest margins were Municipal Tenants, Vintage Value, Modest Traditions and Rural Reality. City Prosperity and Prestige Positions (the largest booker segment) have over double the proportion of bookers compared to population, whilst Suburban Stability and Domestic Success were also among the most over-represented groups.

2022 Profile compared to the Benchmark report

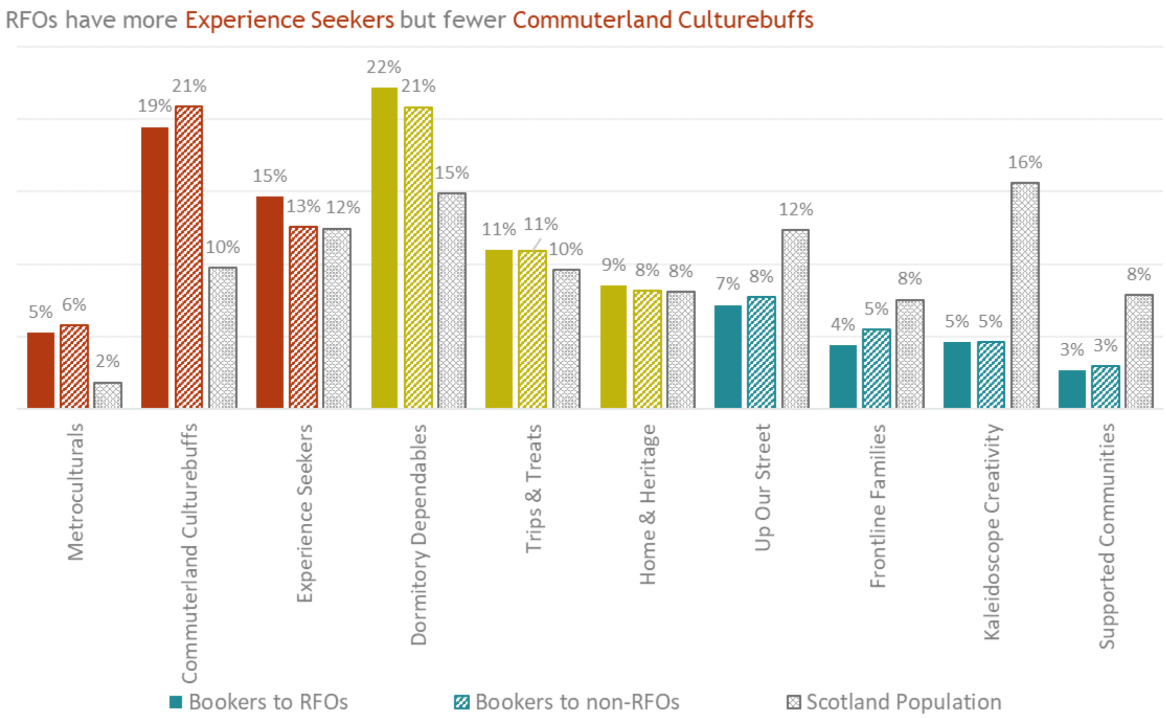
Audience Spectrum profile of bookers and the population



Base: 334, 441 / 402,754 / 2,408,661

Across Scotland, comparing 2022 bookers to the booker profiles from the baseline report, a few segments have shifted their proportions. Commuterland Culturebuffs have increased slightly, becoming even more overrepresented in bookers compared the Scotland's population. Dormitory Dependables follows the same pattern, and Trips & Treats also increased but still almost matches the population proportion. Experience Seekers have decreased in the 2022 profile to a level almost matching their proportion in Scotland's population, from 17% previously to 12% last year. Lower engaged segments have remained very stable. This suggests a different pattern to that occurring in the rest of the UK, where our recent analysis found that Commuterland Culturebuffs have not recovered as much as most other segments in 2022, whilst also unlike Scotland Experience Seekers are unchanged in booking numbers.

Regularly Funded Organisations profiles



Base 249,131 / 107,121 / 2,408,661

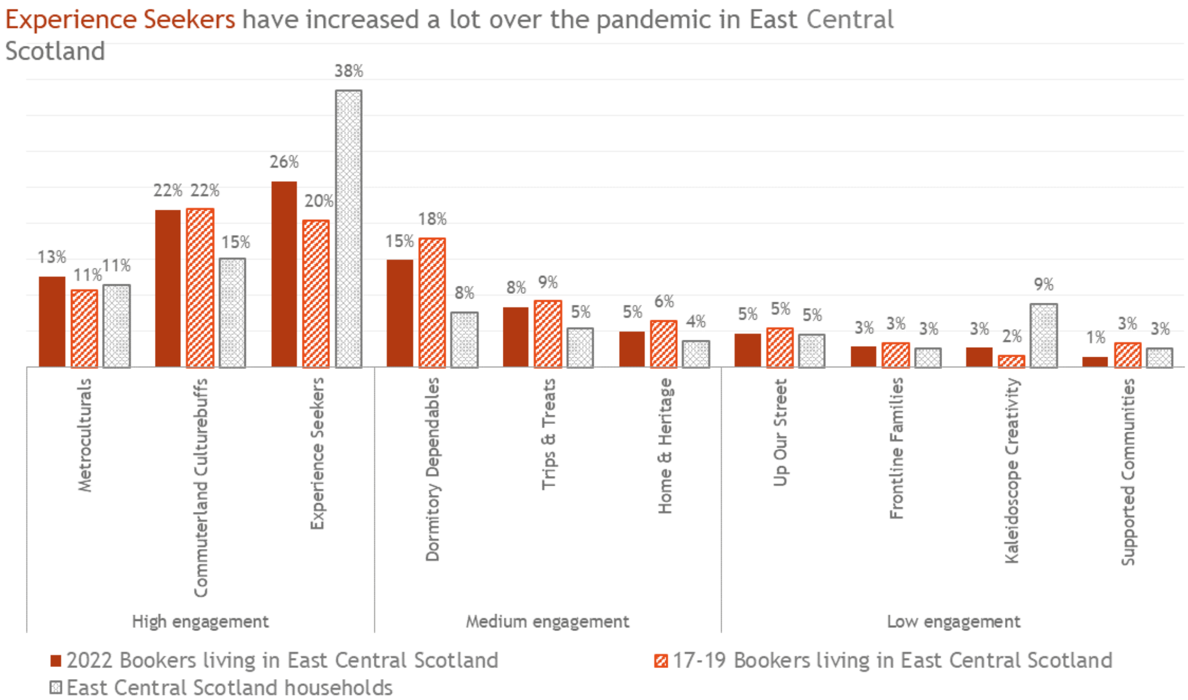
Comparing Creative Scotland's Regularly Funded Organisations (RFOs) with those that do not receive this funding, booker profiles are broadly similar but a few segments are different. Experience Seekers are 2 percentage points higher in RFOs, whilst Commuterland Culturebuffs are 2 percentage points lower. Up Our Street are underrepresented in bookers compared to the population in both types of organisations but are slightly lower in RFOs.

Profiles by Scottish regions

We also analysed each of the regions for their booker profiles compared to the pre-pandemic report and the population. The full set of regional profiles are included in an appendix: we have focused on East Central, West Central and West Scotland, where we found some key differences.

17-19 Bookers are from the Benchmark report.

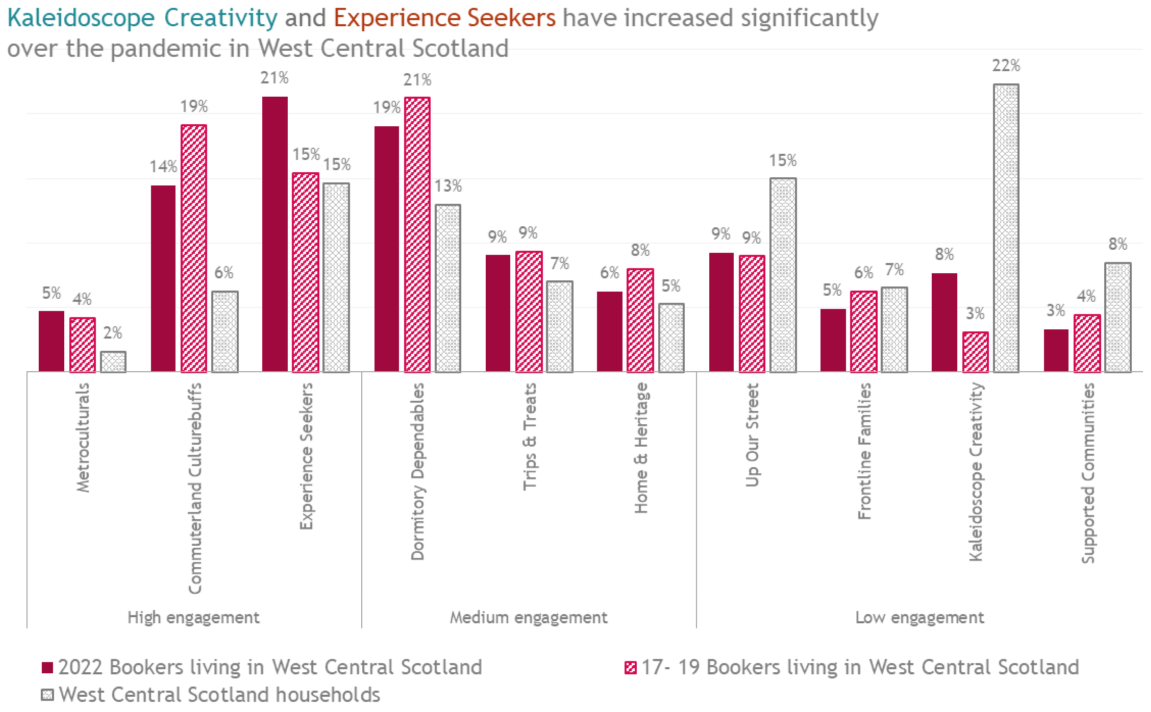
East Central Scotland



Base: 72,428 / 109,513 / 250,083

East Central Scotland is still dominated by highly engaged audiences, especially Experience Seekers, which are a larger part of the profile in 2022. The segment is still underrepresented compared to the region's population but has increased. Dormitory Dependables, a relatively large booker segment, have decreased. Most of the lower engaged segments are small in this region, apart from Kaleidoscope Creativity which is still three times more present in the population compared to 2022 bookers.

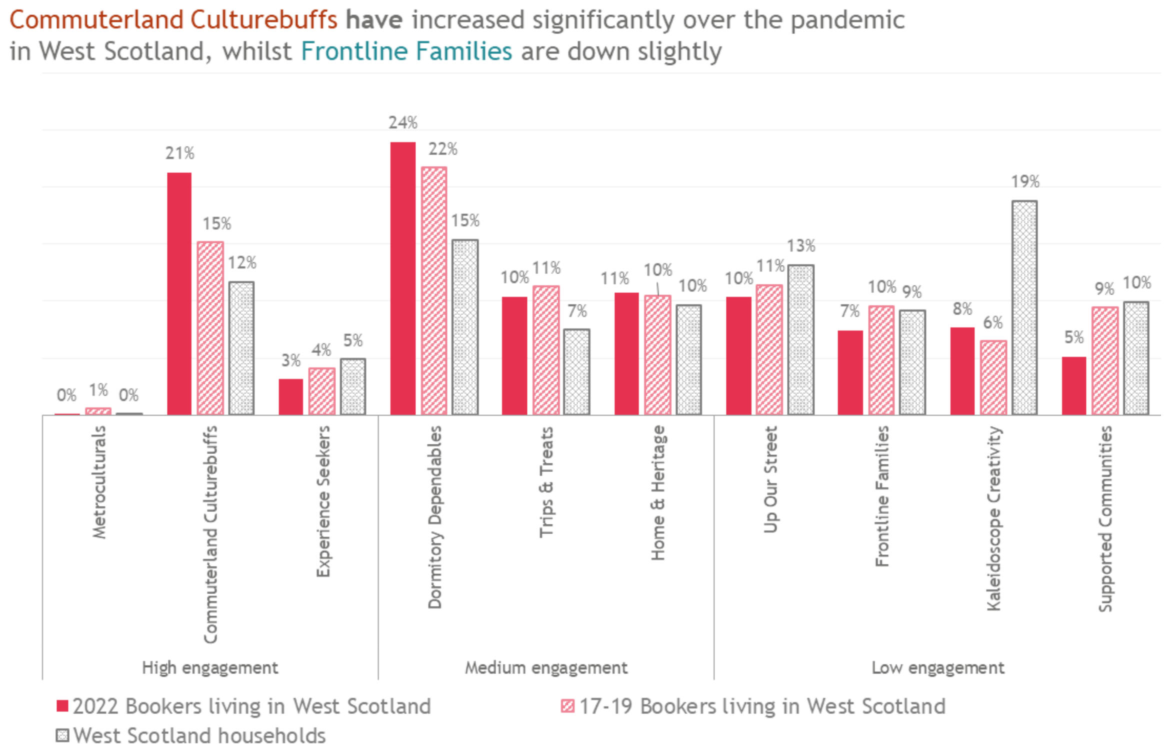
West Central Scotland



Base: 53,779 / 78,150 / 695,731

West Central Scotland, like East Central, has a large percentage of its bookers in the high engaged segments, but unlike most of East Central the bookers here far outnumber the proportion of the population in that segment. Commuterland Culturebuffs have dropped from 19% to 14% in bookers, a trend we're seeing elsewhere in the country. Experience Seekers have increased in proportion even more than in East Central, going from 15% where they matched the population, to 21%. In West Central Scotland, more than anywhere else in Scotland, Kaleidoscope Creativity are a very large segment of the population but are still only 8% of bookers, albeit this appears to have improved recently.

West Scotland

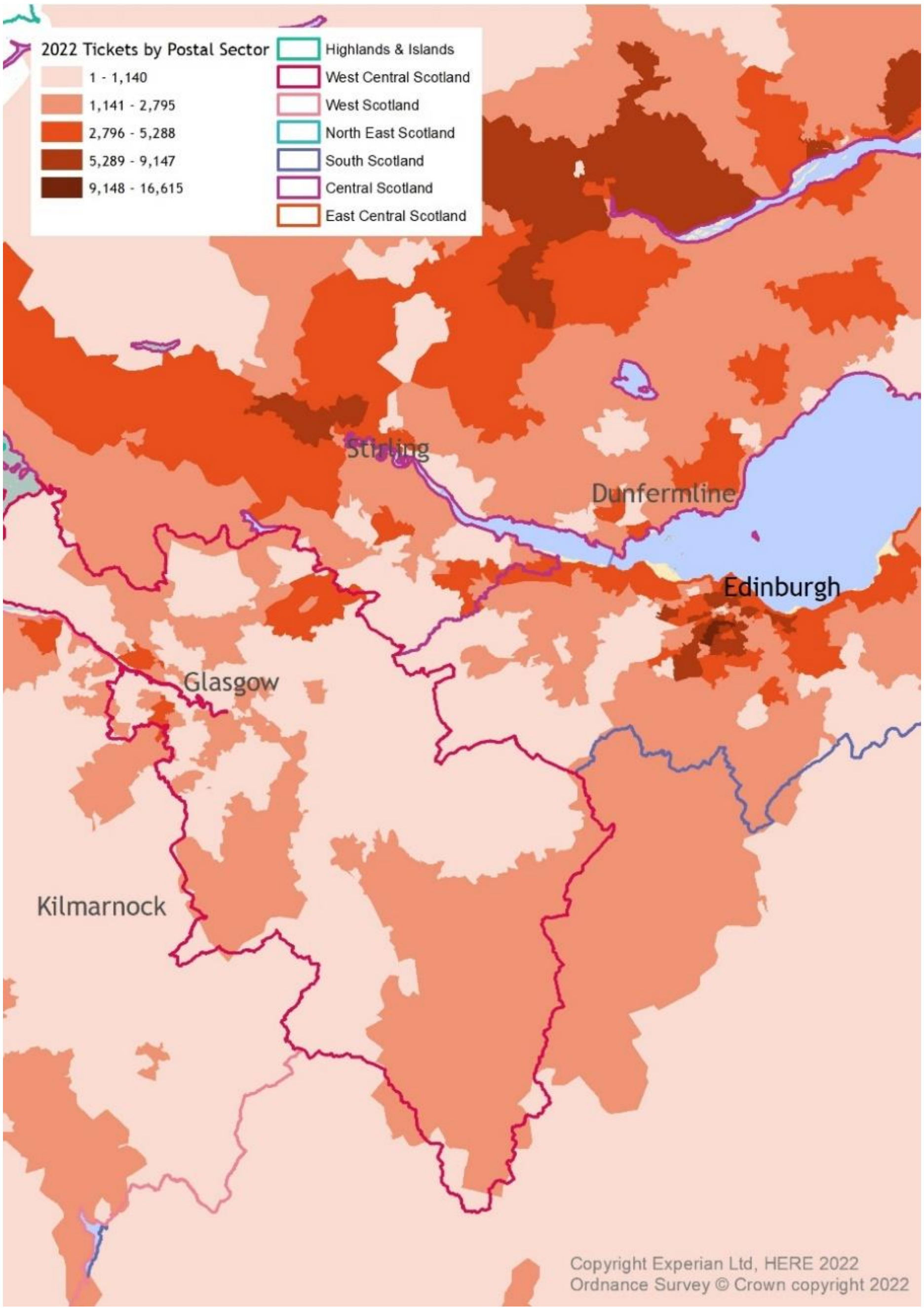


Base: 31,910 / 20,471 / 332,214

The population in the more rural West Scotland falls less into the higher engaged segments than those in East and West Central Scotland. But there is a fairly large proportion of Commuterland Culturebuffs in the population (12%), and this translates into 21% of bookers in 2022, a 6 percentage point increase from the baseline report profile pre-pandemic. Frontline Families, previously exceeding the population proportion in bookers, have decreased to 7%. Kaleidoscope Creativity, like East and West Central Scotland, are the most underrepresented in bookers. This is a pattern seen across Scotland, relatively unsurprising since they are one of the lowest engaged segments.

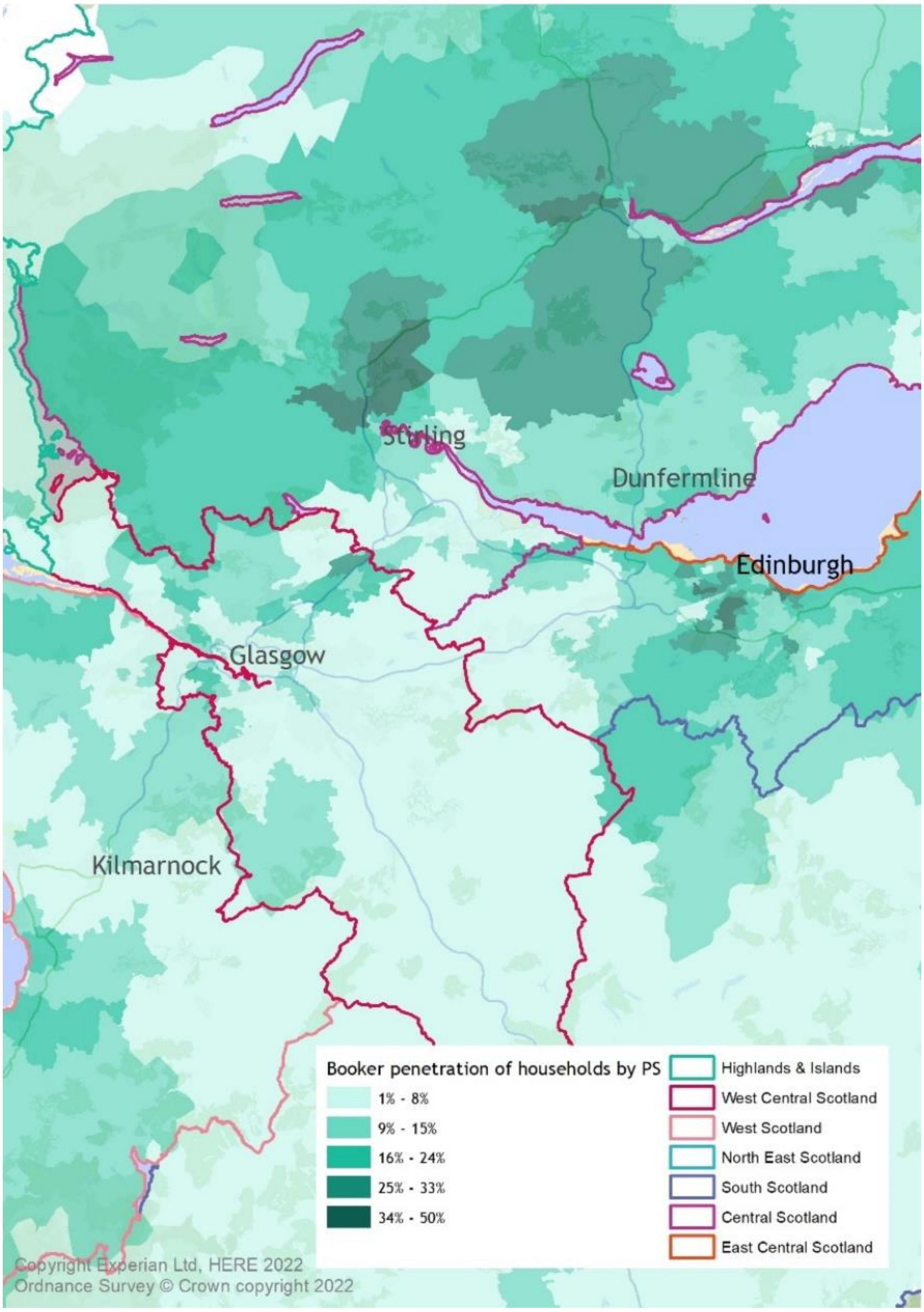
Coverage of bookers across regions

Zoom on Central Belt - Tickets sold in 2022 – by postal sector



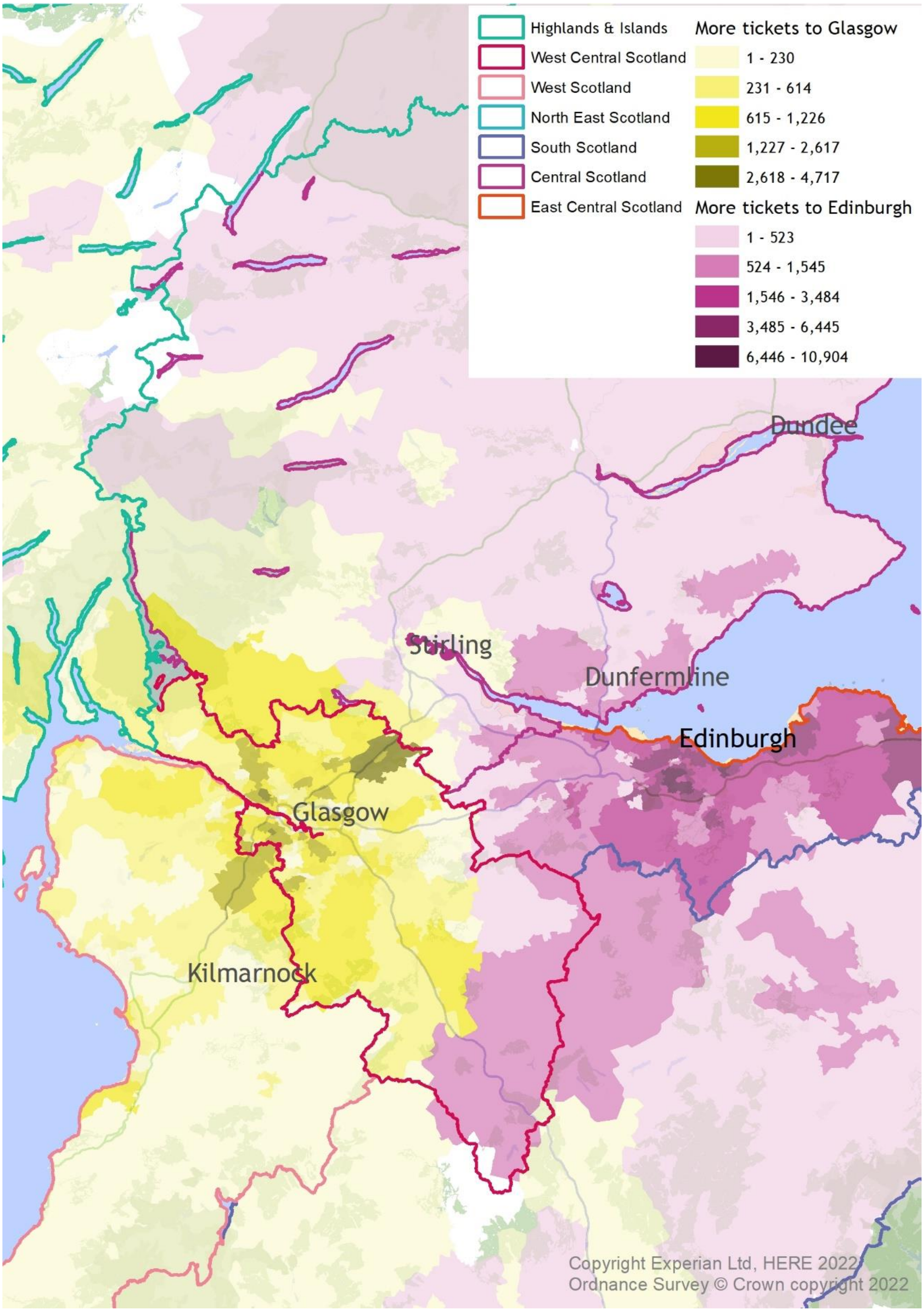
This map shows the tickets issued by all Scotland venues by postal sector, zoomed in on the most densely populated part of Scotland (See Appendix 2 for full map). It shows a concentration of bookings around Edinburgh and to the North of the Central Belt, concentrated around Stirling and Perth. Glasgow appears lighter, as its postal sectors are smaller than around Stirling and Perth: both areas total up a similar number of tickets sold.

Zoom on Central Belt - Penetration of 2022 bookers in households by postal sectors



This map shows a different view of the concentration of arts attendance across this area of Scotland in 2022 (See Appendix 3 for full map). Penetration is the amount of bookers out of the estimated household number, showing that in some postal sectors more than a third of households attend Scottish venues. This is true particularly in the Southwest of Edinburgh, parts of Stirling and Northeast Glasgow.

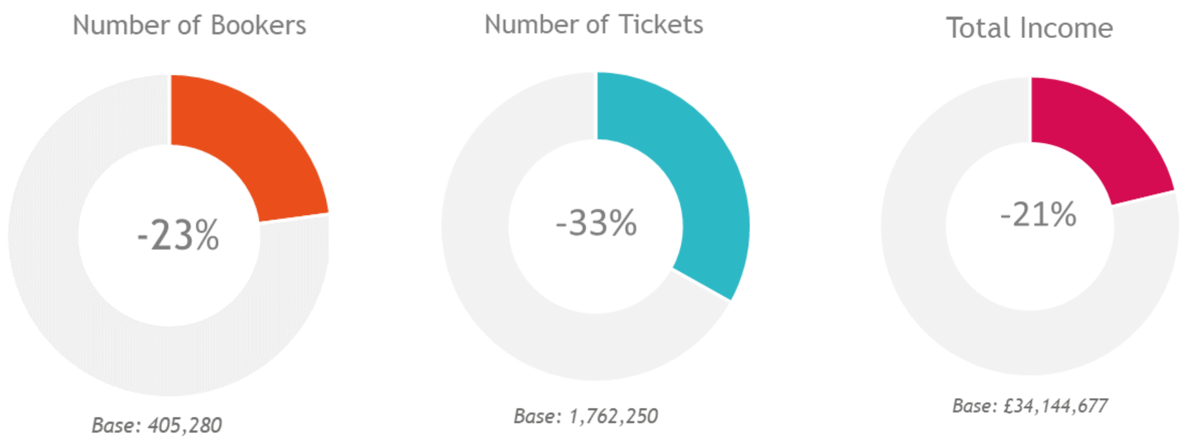
Zoom on Central Belt - Differences in 2022 ticket sales between venues in Edinburgh or Glasgow



We took all postal sectors in Scotland with 2022 ticketing data from venues in Glasgow or Edinburgh and mapped them above (full map in Appendix 5). Postal sectors were categorised as having either more tickets to Glasgow or Edinburgh, with the numbers and colour scale representing how many more tickets to venues in the top city were sold. While the highest density of tickets to each city was unsurprisingly in the area surrounding that city, Edinburgh's venues totalled about twice as many tickets sold in its top postal sectors, as Glasgow venues did. The reach of Edinburgh venues into the South followed the A702 line, into South Lanarkshire. Towards the North, it reached into the top of the Loch Lomond around Crianlarich. Glasgow had a strong reach towards Cumbernauld, and Stirling and its outskirts also bought slightly more tickets to Glasgow venues, while Falkirk attended Edinburgh more. The Highlands and Islands buy more tickets to Glasgow, as is shown on the full map (see Appendix).

Changes since Covid

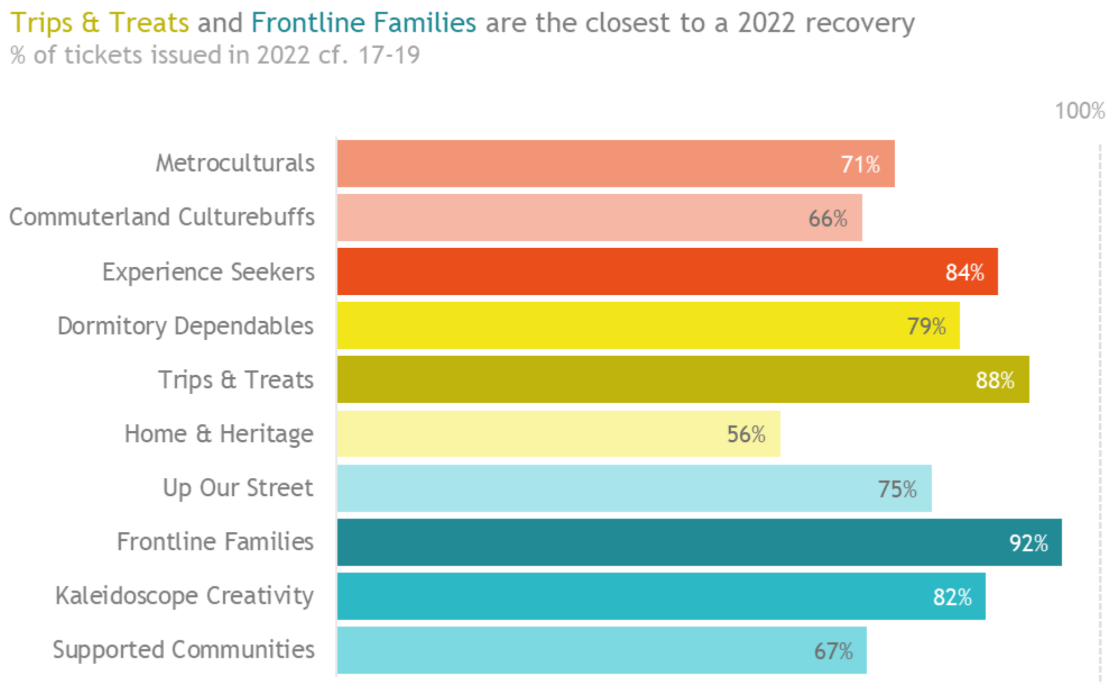
Overall sales



We found that unique bookers have dropped 23% over the pandemic, whilst ticket sales are down further, at a 33% drop, suggesting that, as well as fewer people booking, those who are booking are buying fewer tickets that they used to. Total income from venues is comparatively doing a bit better, dropping 21%. These figures show a significantly worse recovery from pre-pandemic than the rest of the UK, which is unsurprising considering the different pattern of Covid-19 restrictions, explored below.

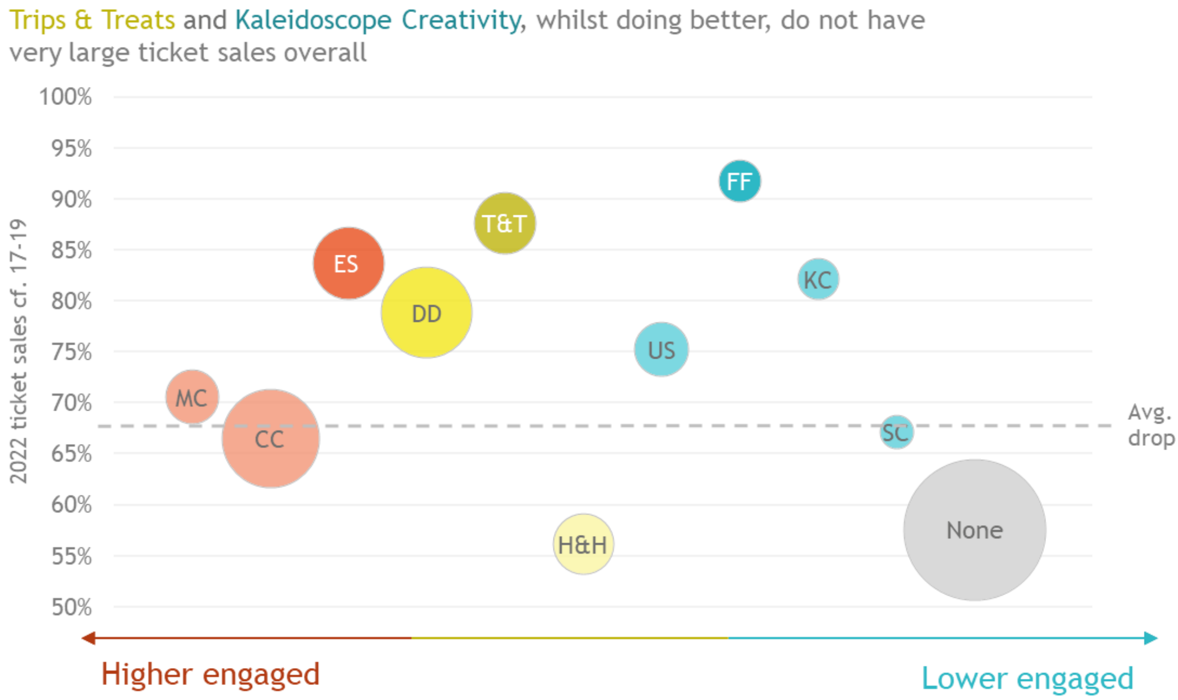
By Audience Spectrum profile

% of 2022 tickets compared to 2017-19 average by segment



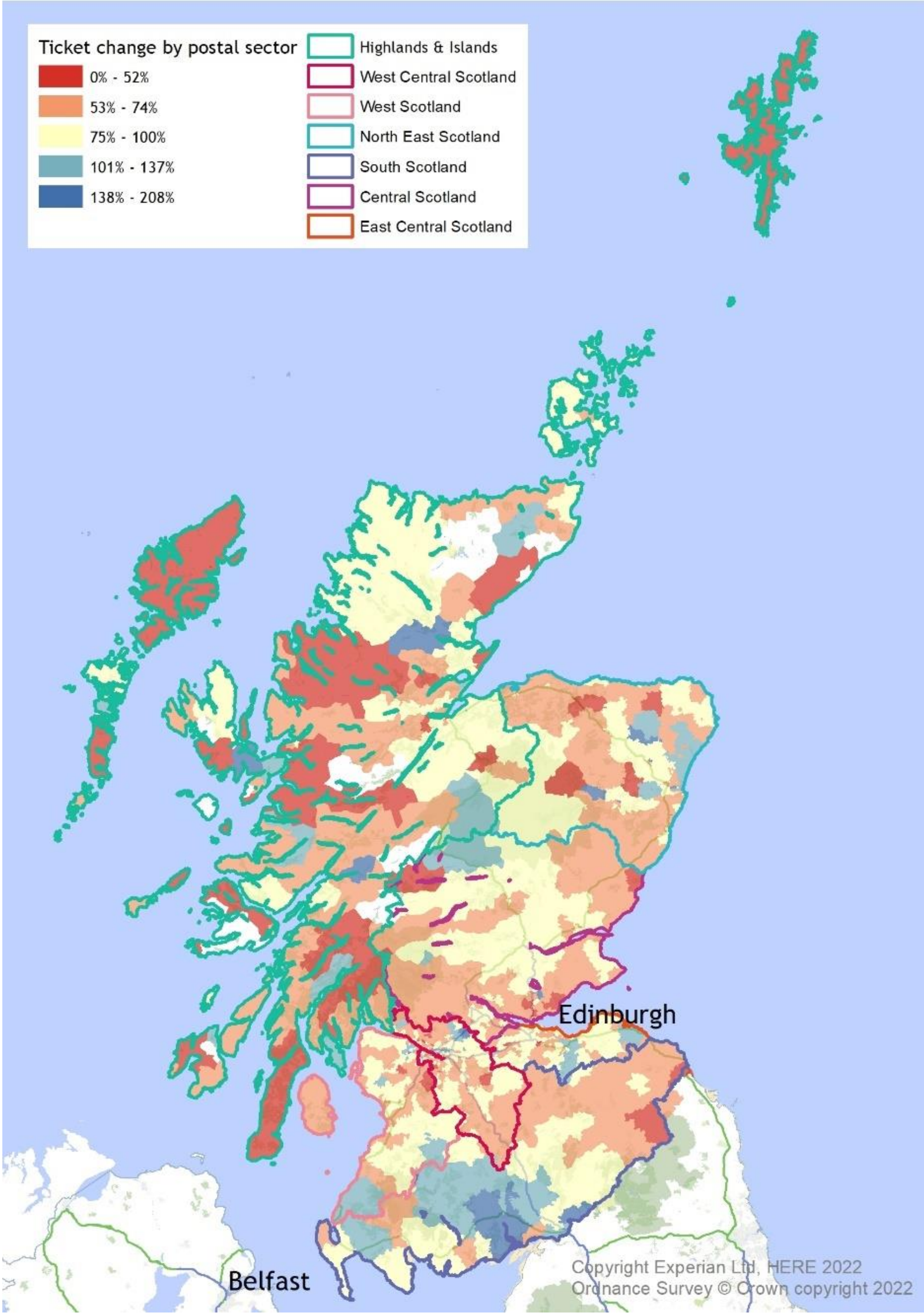
The Audience Spectrum segments vary a lot in their proportion compared to before the pandemic. Matching trends seen across the UK in our other research, family heavy segments such as Trips & Treats and Frontline Families are comparatively doing a lot better than most other segments. Like the rest of the UK, the older Home & Heritage segment has by far the worst recovery post Covid-19 restrictions, which our research found reflects a hesitation over the danger from Covid-19 still and other factors like the loss of habit.

% of 2022 tickets compared to 2017-19 average by segment and 2022 volume of tickets

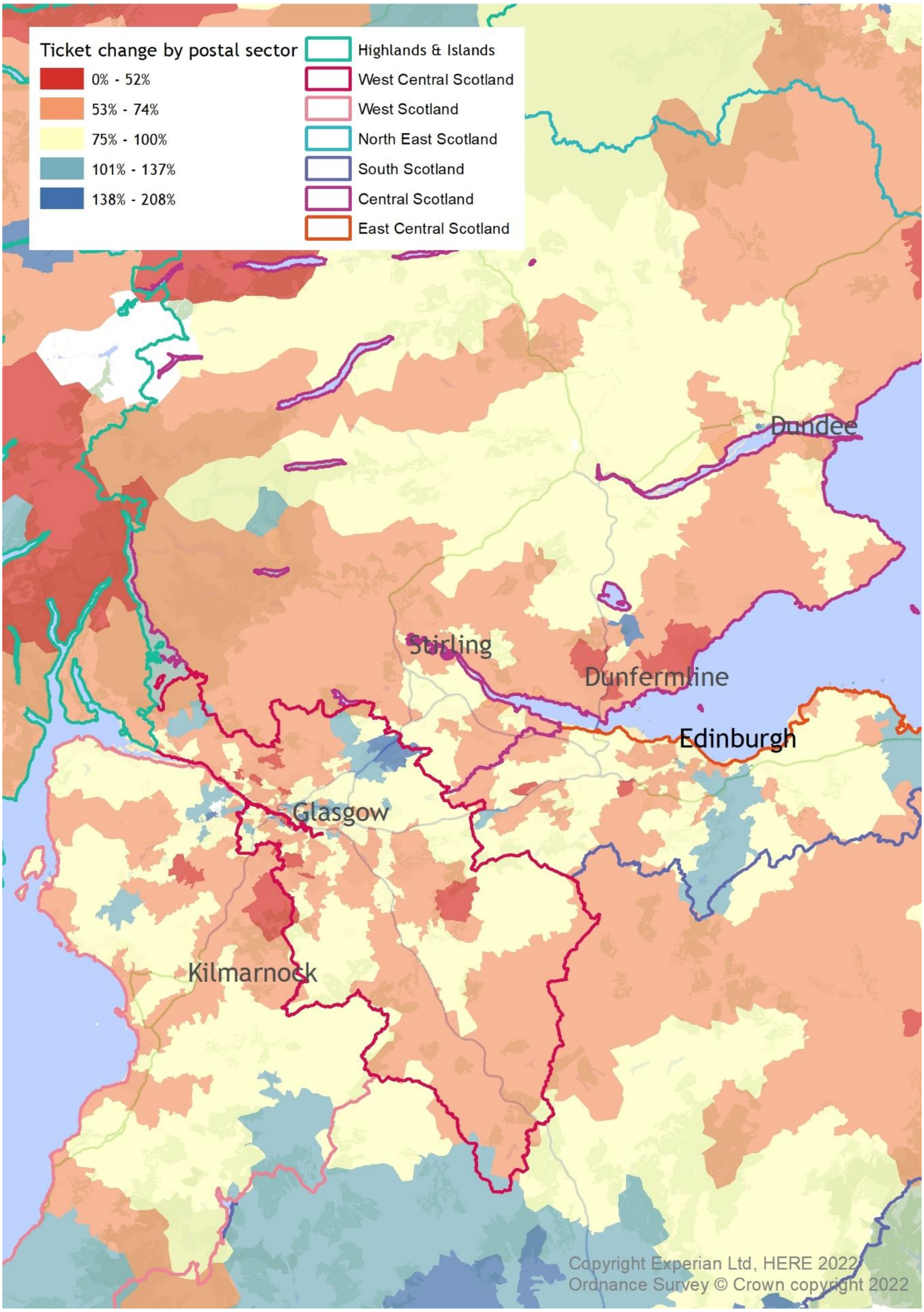


We also mapped the change in Audience Spectrum segment ticket sales, represented in the chart above with the size of the bubbles representing the volume of 2022 ticket sales for that segment. The dashed line is the average ticket change in Scotland overall. As mentioned above, the Trips & Treats and Frontline Families segments are the most recovered. But these are fairly small in terms of ticket volume in Scotland, and Commuterland Culturebuffs (the largest segment) is down more than average, presenting the biggest danger to recovery for Scottish venues. The worst performing Home & Heritage segment is not particularly large in ticket sales, a positive for local venues. Note that a number of large venues don't have data categorised by Audience Spectrum, represented by the None bubble which is well below average, explaining why most of the segments are above the dashed line.

Change in ticket sales by postal sector – 2022 compared to average sales in 2017-19

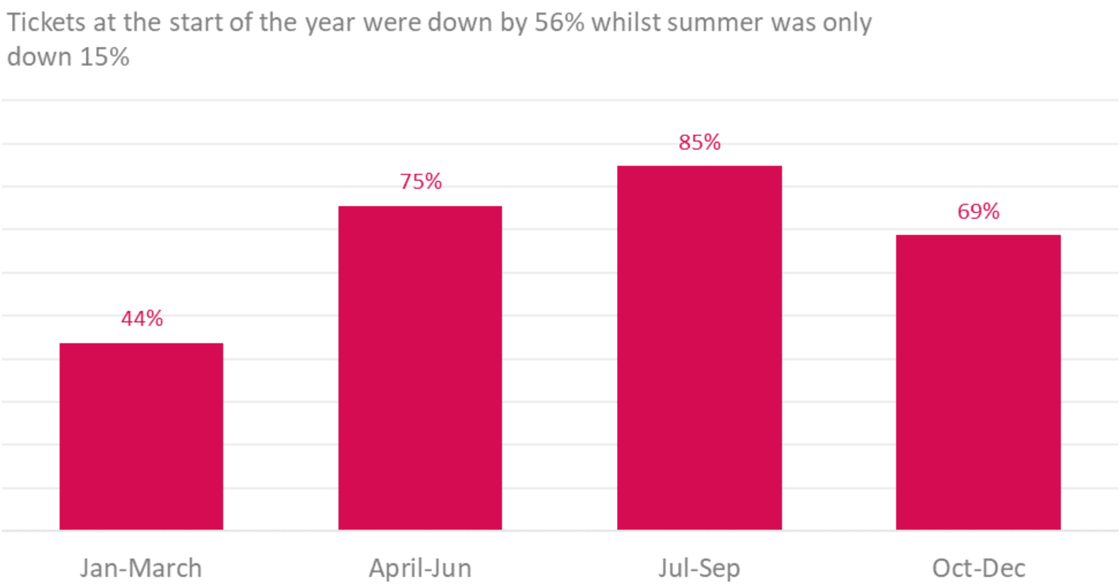


Zoom on Central Belt - Change in ticket sales by postal sector – 2022 compared to average sales in 2017-19



As expected from the overall drop in ticket sales, most postal sectors in Scotland are red on the above map, showing 2022 drops of more than half (dark red). This is especially true in the Highlands & Islands, and around Aberdeen, although this could be influenced by some key venues missing from this analysis[1]. Some areas, however, are at or nearly at pre-Covid levels, with patches of blue scattered across all regions. South Scotland has large areas above pre-Covid levels but note that rural areas represent small numbers of tickets so are more likely to show big swings. Some sectors around Glasgow and Edinburgh, which appear as dense booking areas on the 2022 tickets by postal sector maps, also have an encouraging picture.

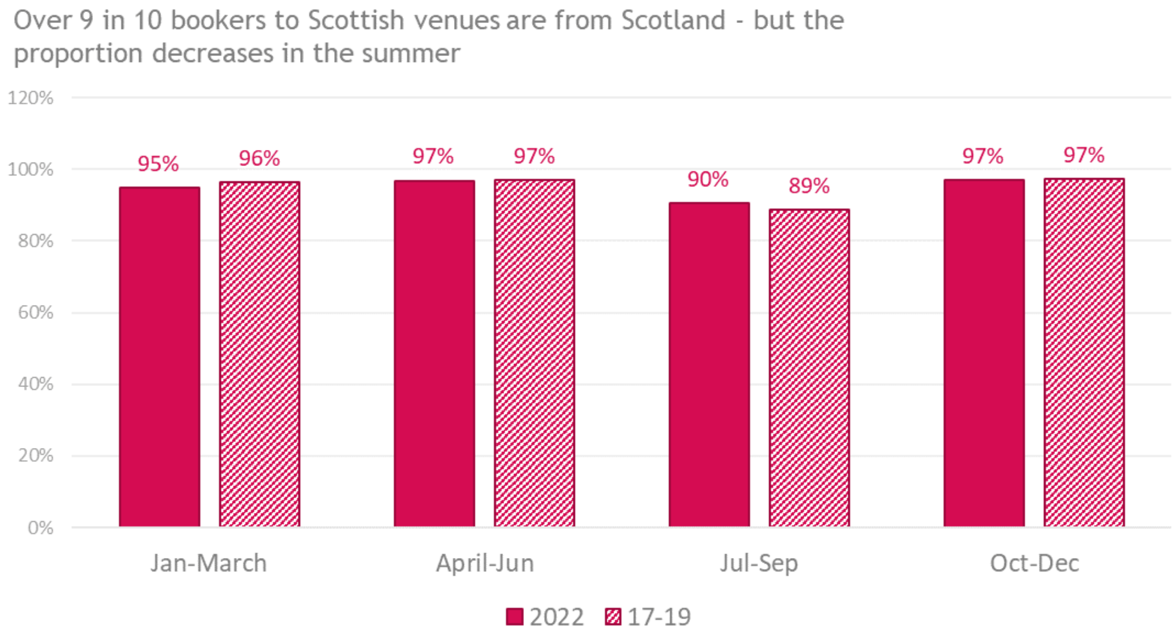
By season



The reduction in ticket sales in 2022 compared to pre-pandemic was a more complex picture when we looked at the change by quarter of the calendar year. The graph above shows the Jan-March period is the biggest factor in the significant drop overall, with ticket sales down 56%. This is unsurprising because Scotland still had significant Covid-19 restrictions in place during this period which limited the audience capacity of venues. Recovery then increased in spring until the summer period only had a 15% drop in ticket sales compared to pre-pandemic. However, the Autumn saw ticket sales drop again, as it has done in the rest of the UK. This can be attributed to the cost of living increases creating a double squeeze on households and venues, just as they were starting to recover from the pandemic.

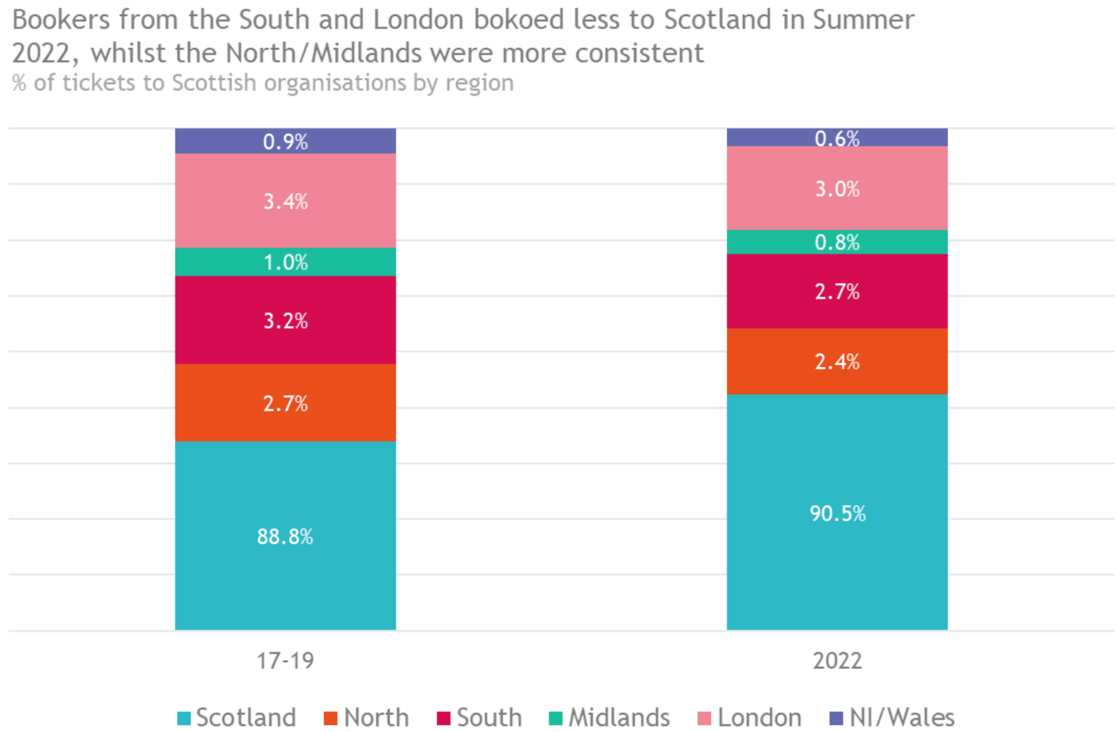
[1] See methodology

% of Scottish bookers to Scottish venues, 2022 compared to 2017-19 average



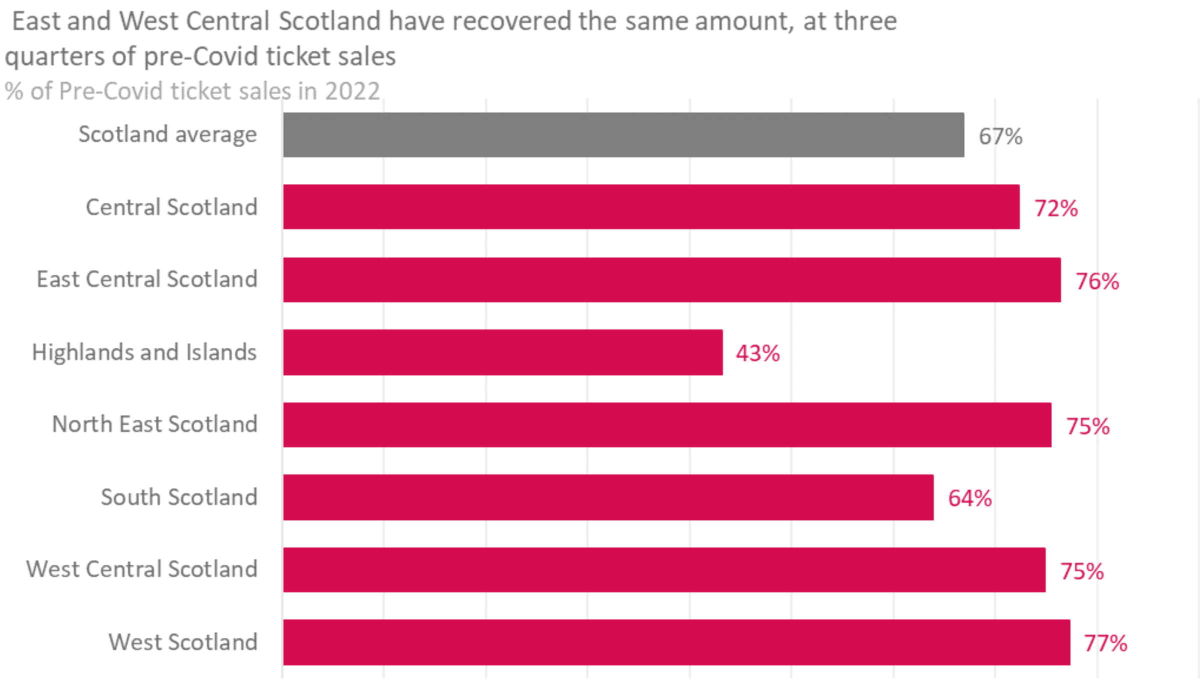
Over 9 in 10 bookers to Scottish venues live in Scotland, however this proportion drops in the summer, due largely to the festival season in Edinburgh. Most of these Summer bookers from further afield are from London, however this geographical profile has shifted slightly in 2022.

% of tickets to Scottish venues from UK regions, summer 2022 compared to 2017-19 average



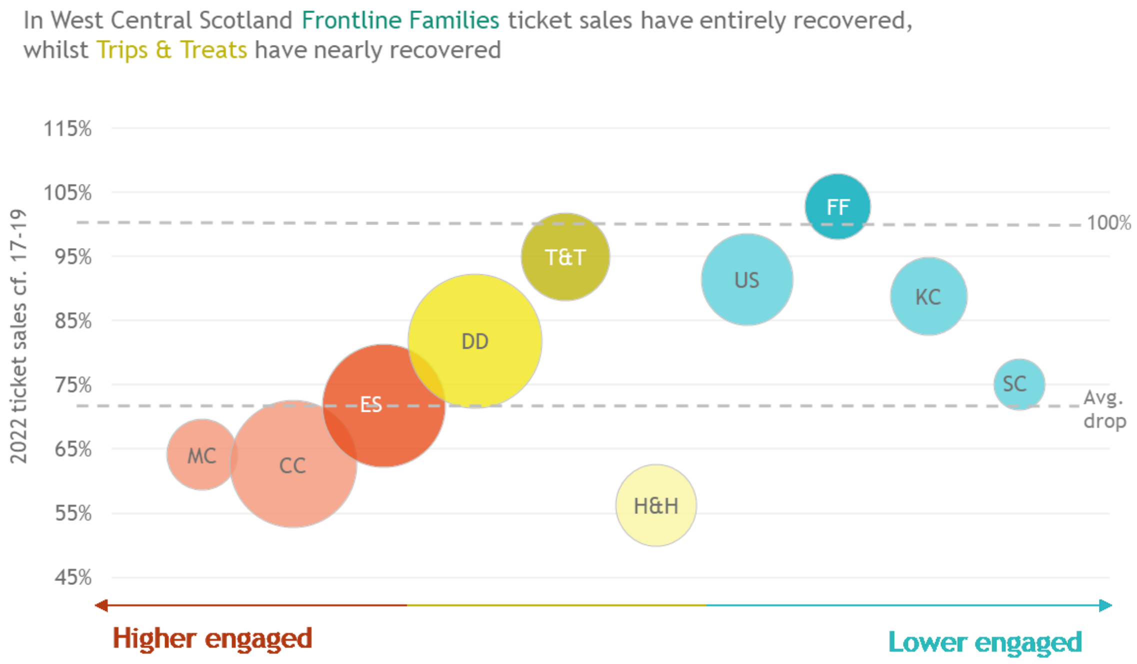
When we investigated where audiences were coming from in the UK when they visited Scottish venues in summer, there were some shifts in 2022 compared to pre-pandemic. Whilst London and the South still buy more tickets than other regions, this seems to be decreasing. The regions closer to Scotland are very similar in 2022 as they were previously, perhaps suggesting audiences don't want to travel as far now, but those with a short travel time will still come.

By region



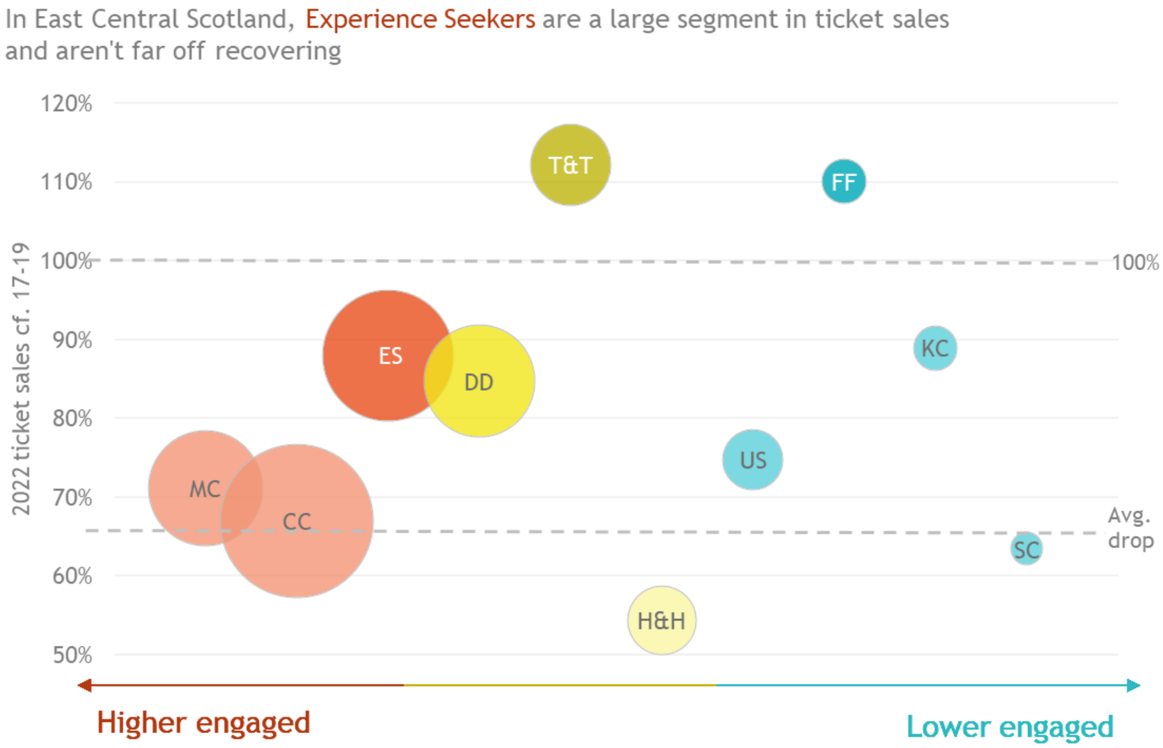
Regionally there is a lot of variety in recovery levels. Residents from West Scotland are buying the most tickets post-pandemic of all regions, but only slightly above East and West Central regions. Highlands and Islands are very low, and likely pulling the average down, due to the issue with local venue mentioned in the Methodology.

% of 2022 ticket sales compared to 2017-19 by segment and volume, West Central Scotland



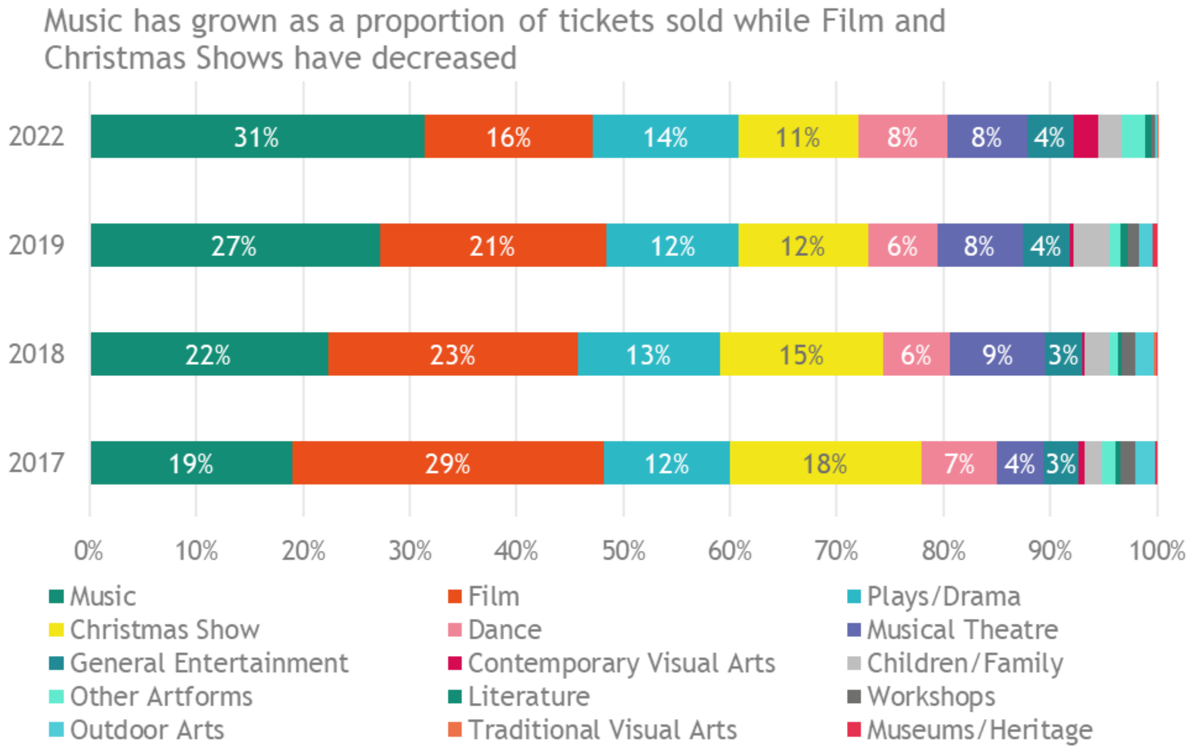
Ticket sales in West Central Scotland mostly match what is happening nationally, with family heavy segments recovering and Home & Heritage down a lot. Experience Seekers, a large segment in the region, are still down 28%, in a way they aren't in the below chart of East Central Scotland.

% of 2022 ticket sales compared to 2017-19 by segment and volume, East Central Scotland



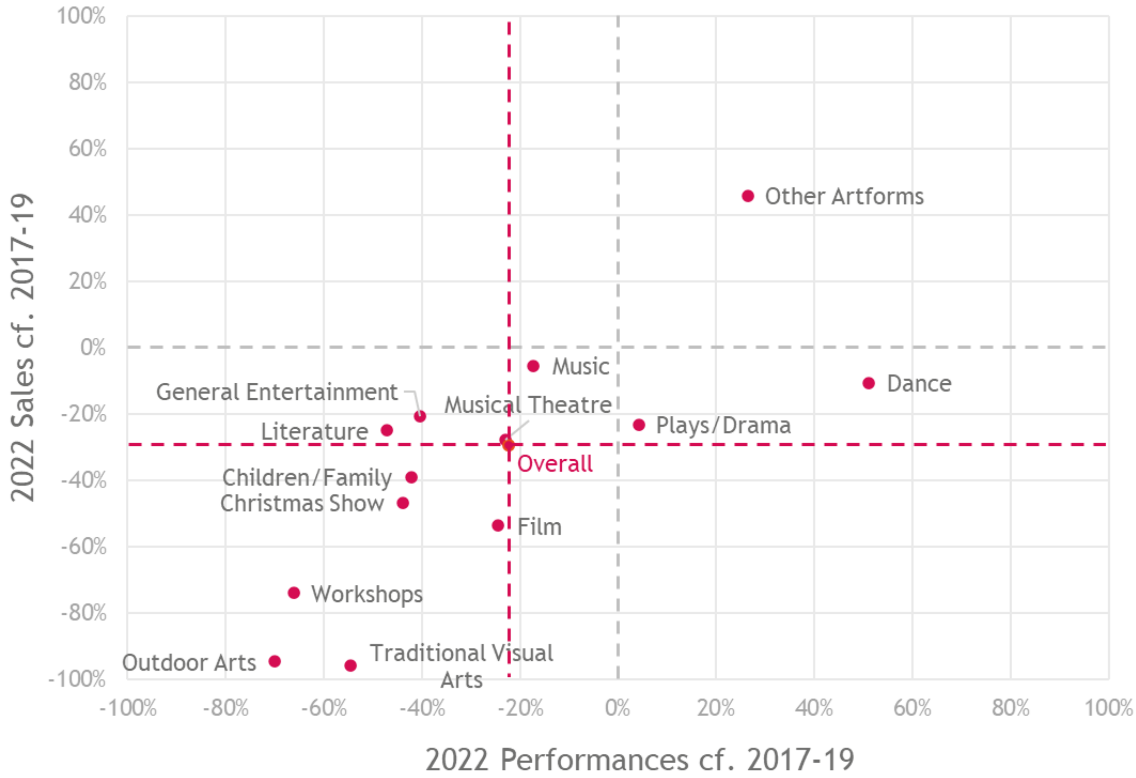
In East Central Scotland Trips & Treats are significantly higher than they were pre-pandemic, suggesting an opportunity for venues in this region to provide family targeted events to aid recovery. Experience Seekers, a large segment in the region, are only down 12%. But the other two higher engaged segments are at around two thirds of pre-Covid levels. The largest segment, Commuterland Culturebuffs, is down around a third, as it is above in West Central Scotland.

By art form



When looking at tickets sold for various art forms in the last year compared to pre-pandemic years, a few differences jump out, such as the growth in Music performances, and gradual shrinking of Film viewings put on at the venues in our data set.
However, is it worth noting that the art form proportions in 2022 seem to broadly follow the trends that were already happening pre-Covid, such as Music increasing and Film decreasing. The proportion of Christmas shows has also followed its pre-Covid pattern.

% change in performances by art form in 2022, compared to the % change in ticket sales by art form in 2022



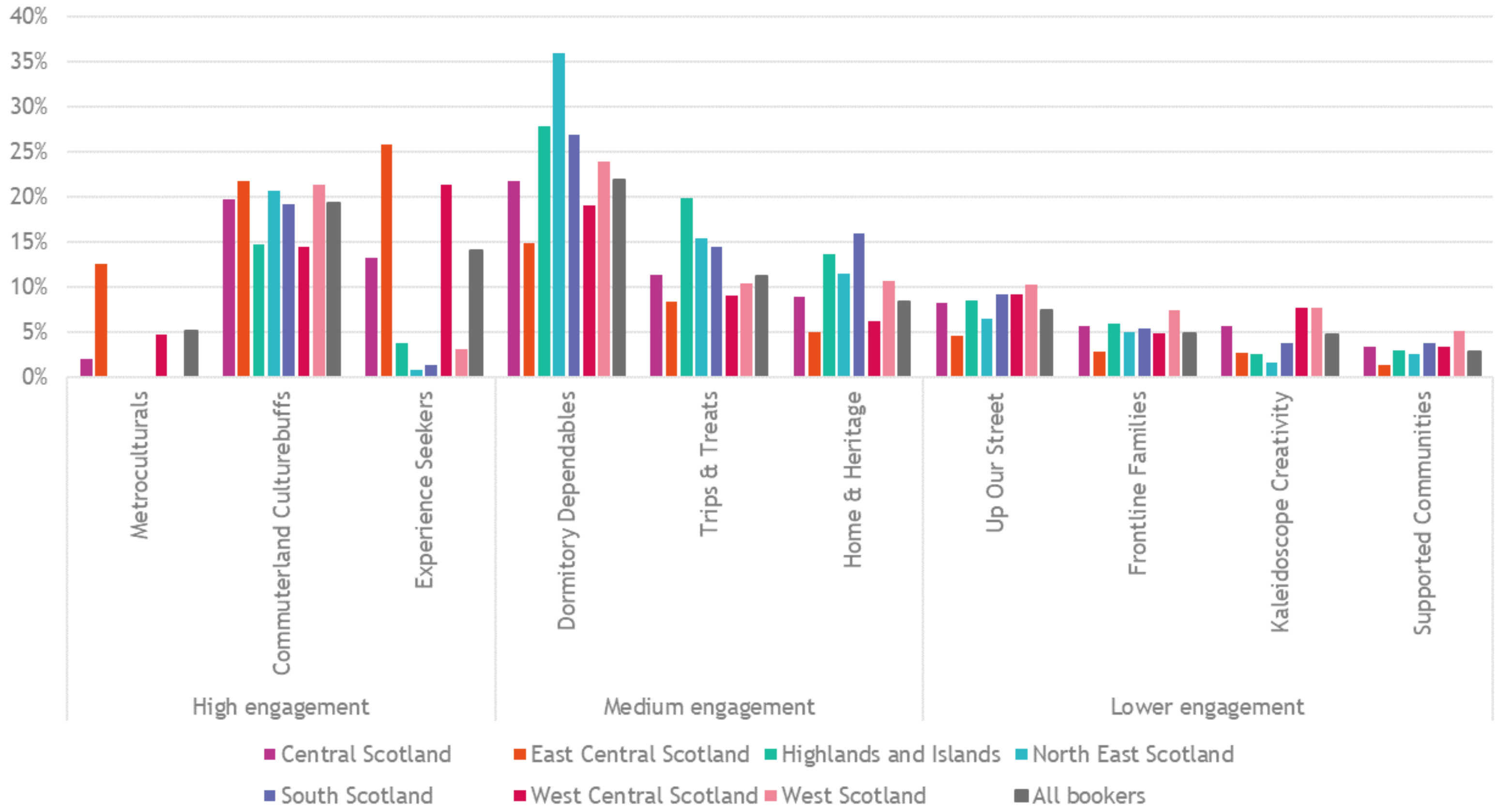
The scatter plot of sales change by art form also highlights some differences: while there has been an increase in the number of performances put on for certain artforms like Dance and Plays/Drama, others got programmed significantly less, such as Outdoor Arts, Workshops, and even Christmas Shows. Overall there was a drop in the number of tickets sold to most artforms, compared to how they were selling pre-pandemic. But generally speaking there was a correlation between the drop in number of performances and the extent of the drop in ticket sales.

Appendices

Appendix 1: Regional Audience Spectrum Profiles

East and West Central Scotland dominate the Metroculturals and Experience Seekers profiles

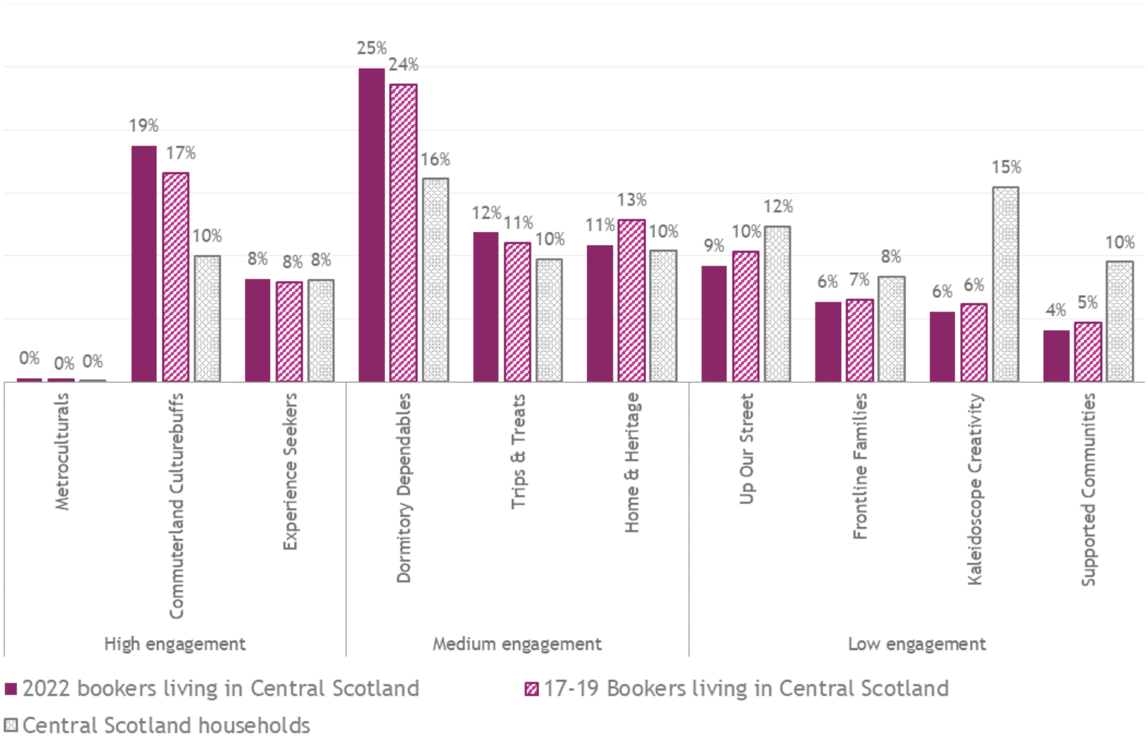
AS profile of each region (% of bookers)



Base: 91,387 / 72,428 / 21,276 / 35,664 / 6,590 / 53,779 / 31,910

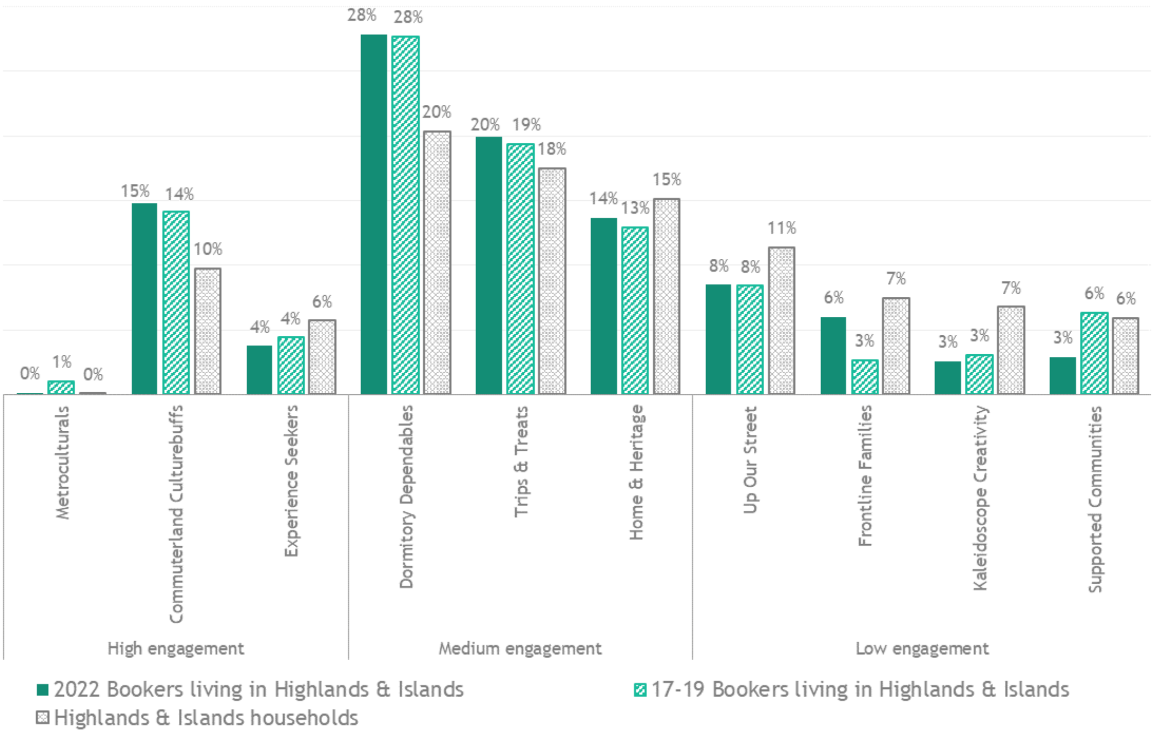
Appendix 2: Audience Spectrum profiles by Scottish Regions

Central Scotland



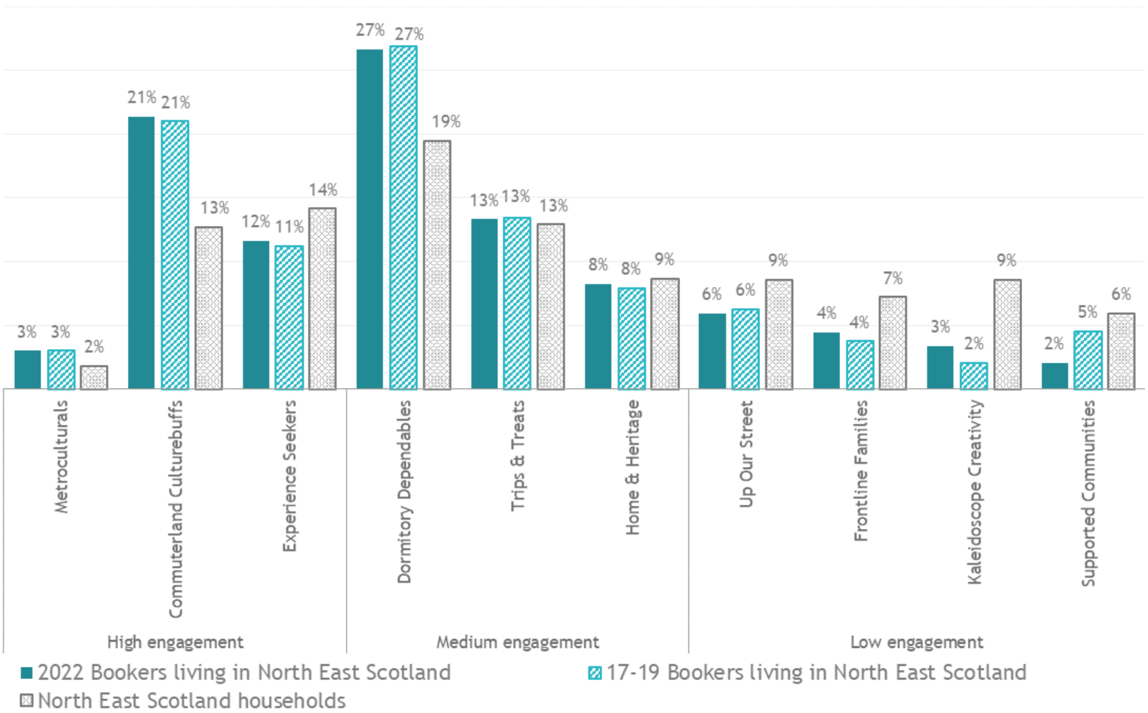
Base: 69,155 / 129,764 /331,332

Highlands & Islands



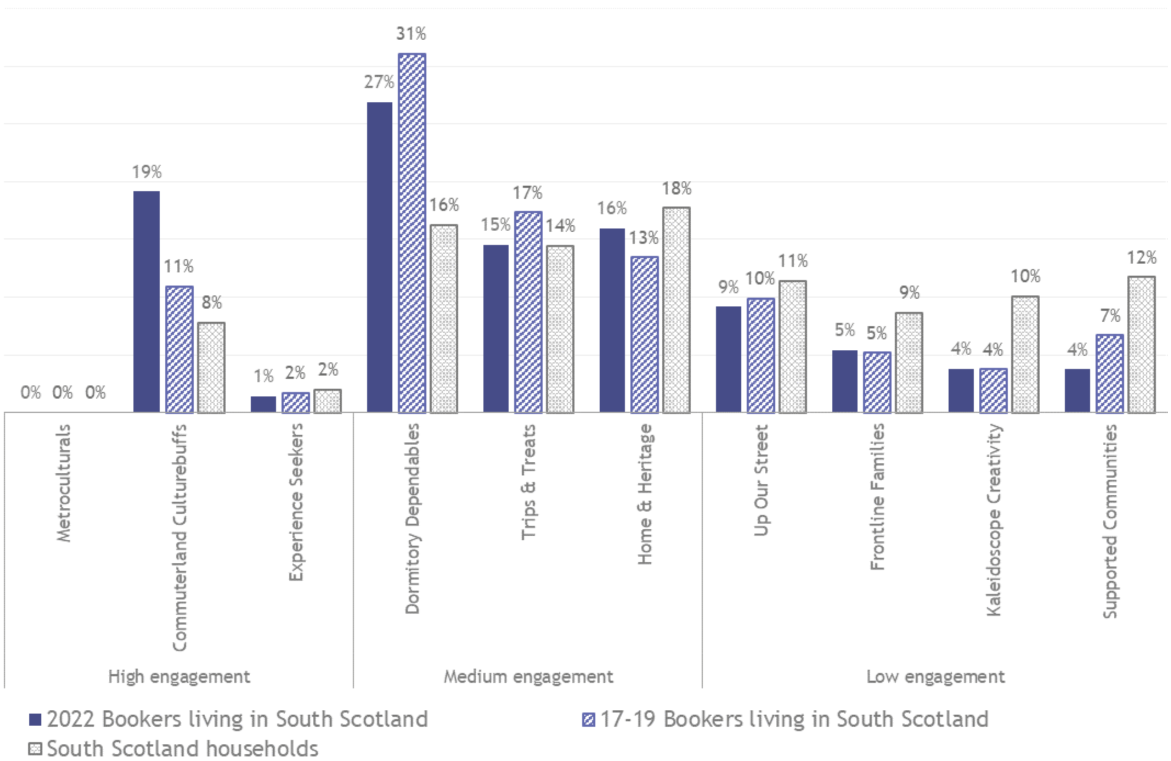
Base: 21,276 / 24,222 / 110,234

North East Scotland



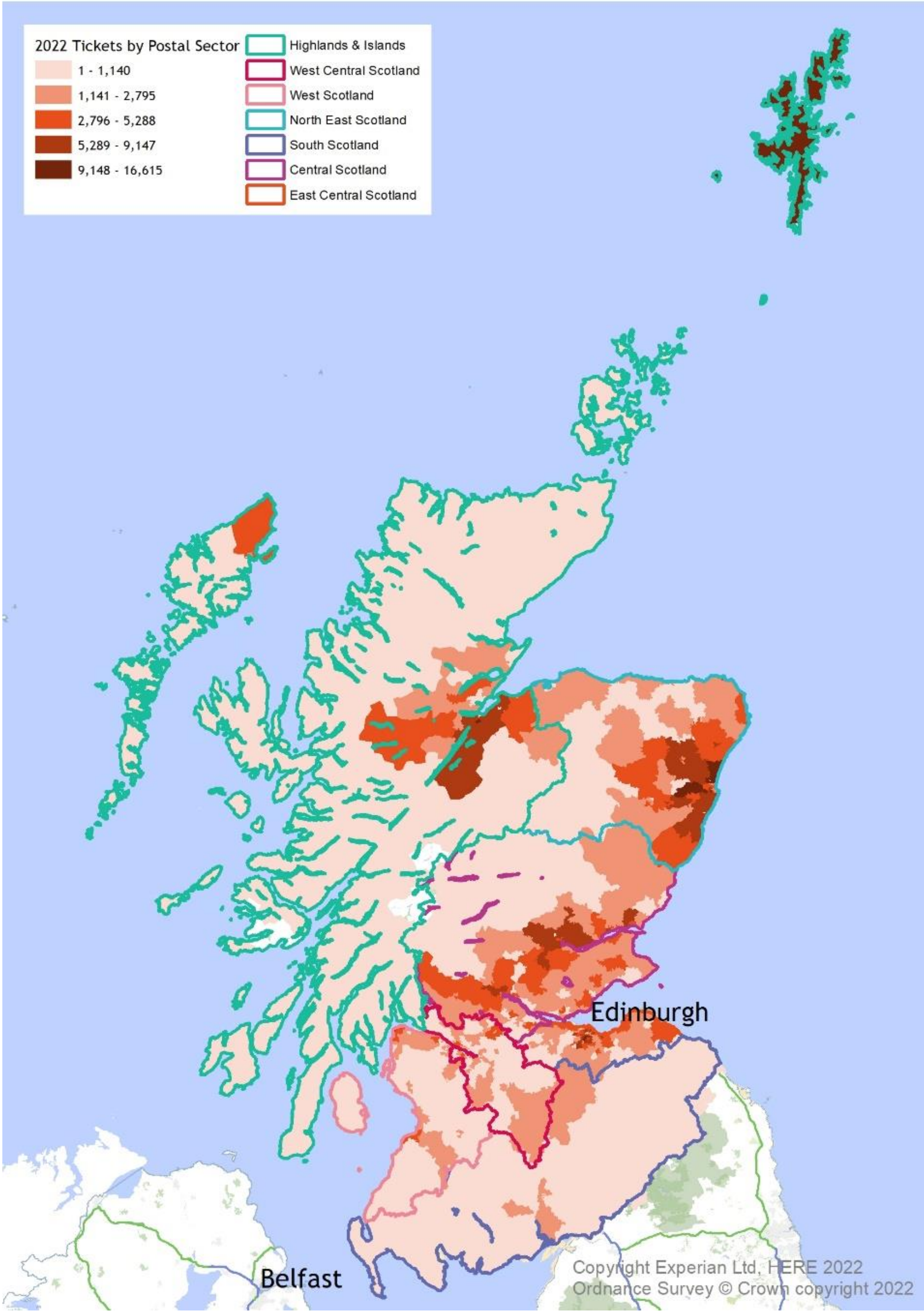
Base: 57,986 / 61,329 / 242,111

South Scotland

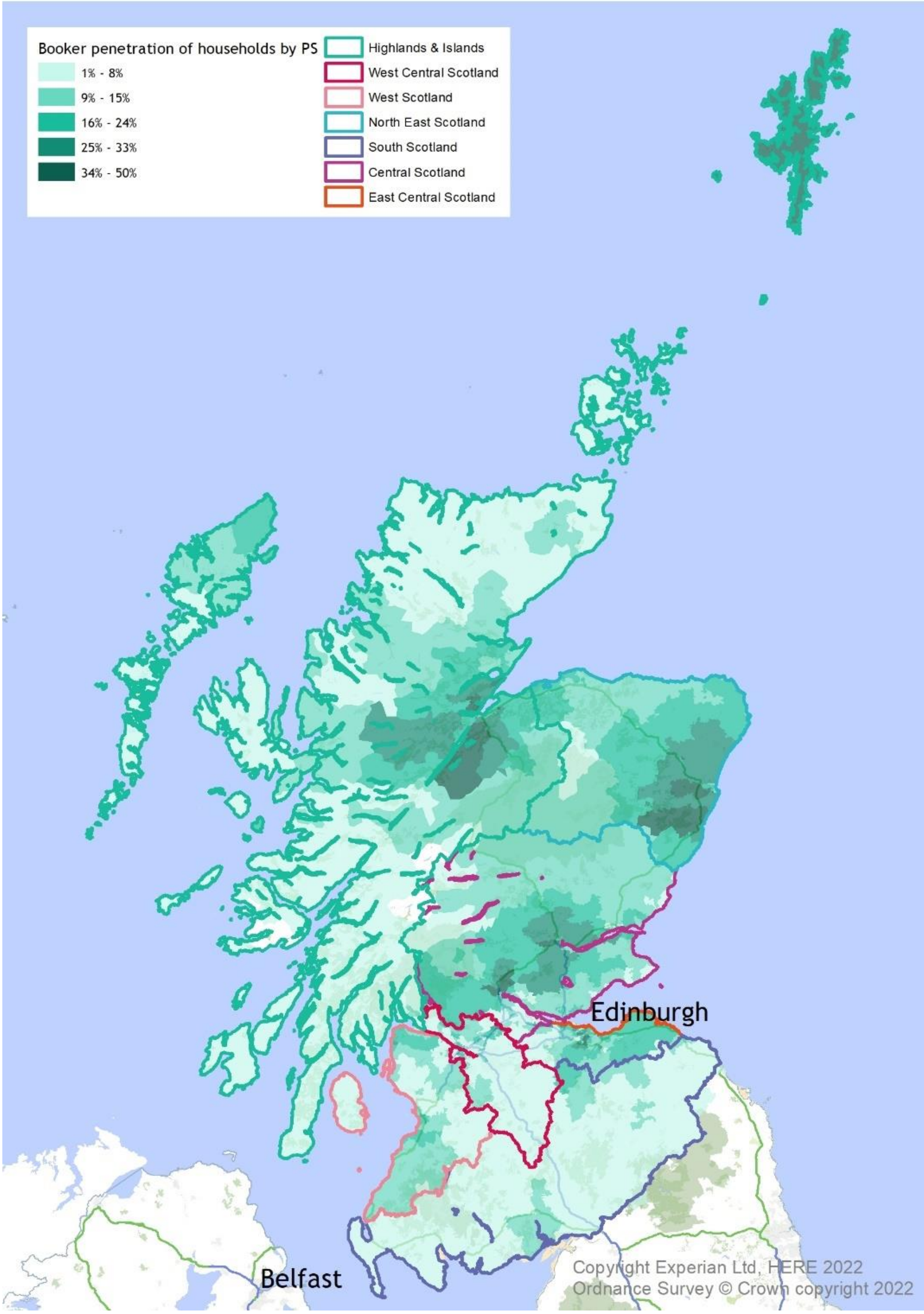


Base: 6,590 / 2,457 / 110,844

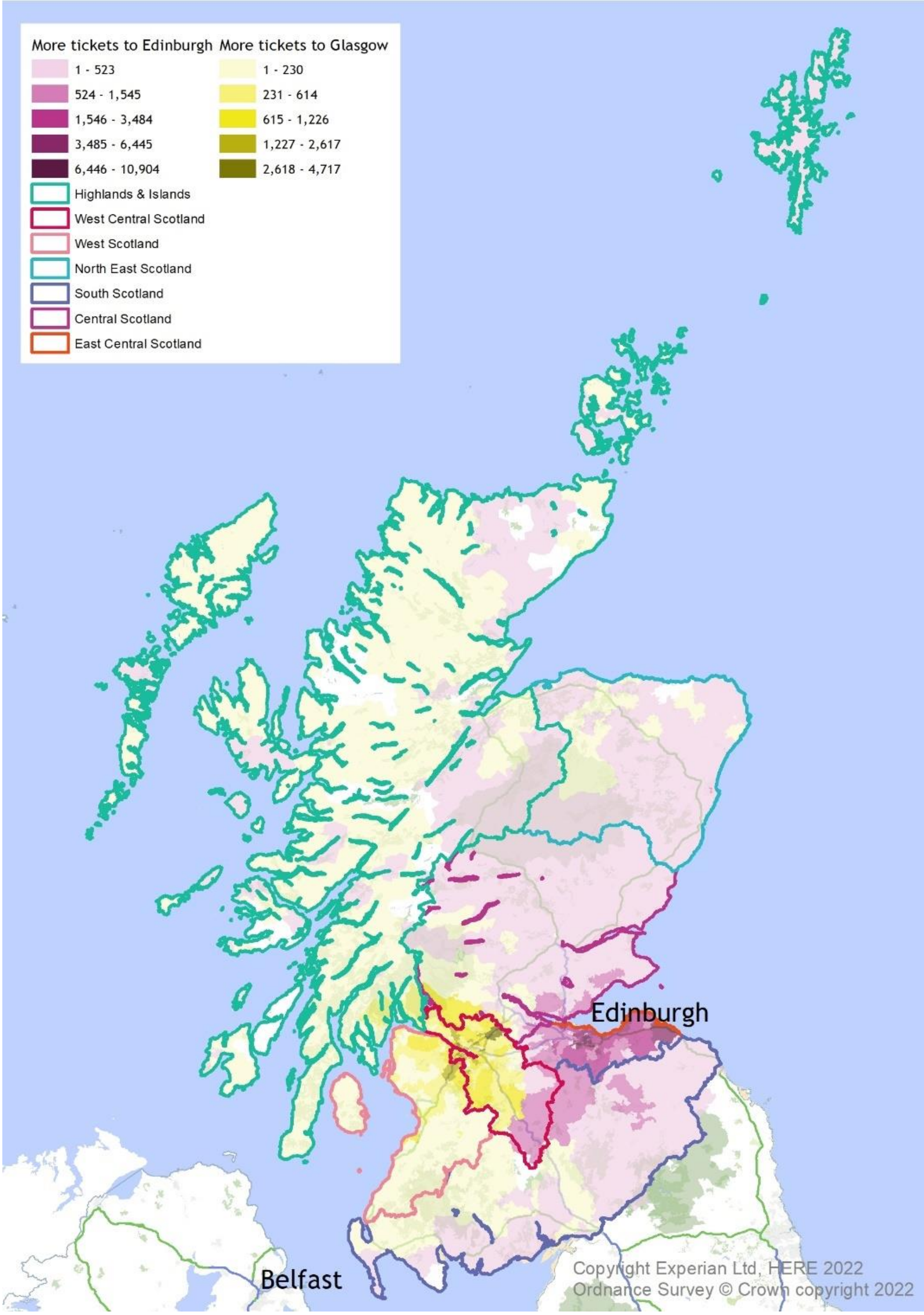
Appendix 3: 2022 count of tickets by postal sectors



Appendix 4: Penetration of 2022 bookers in households by postal sectors

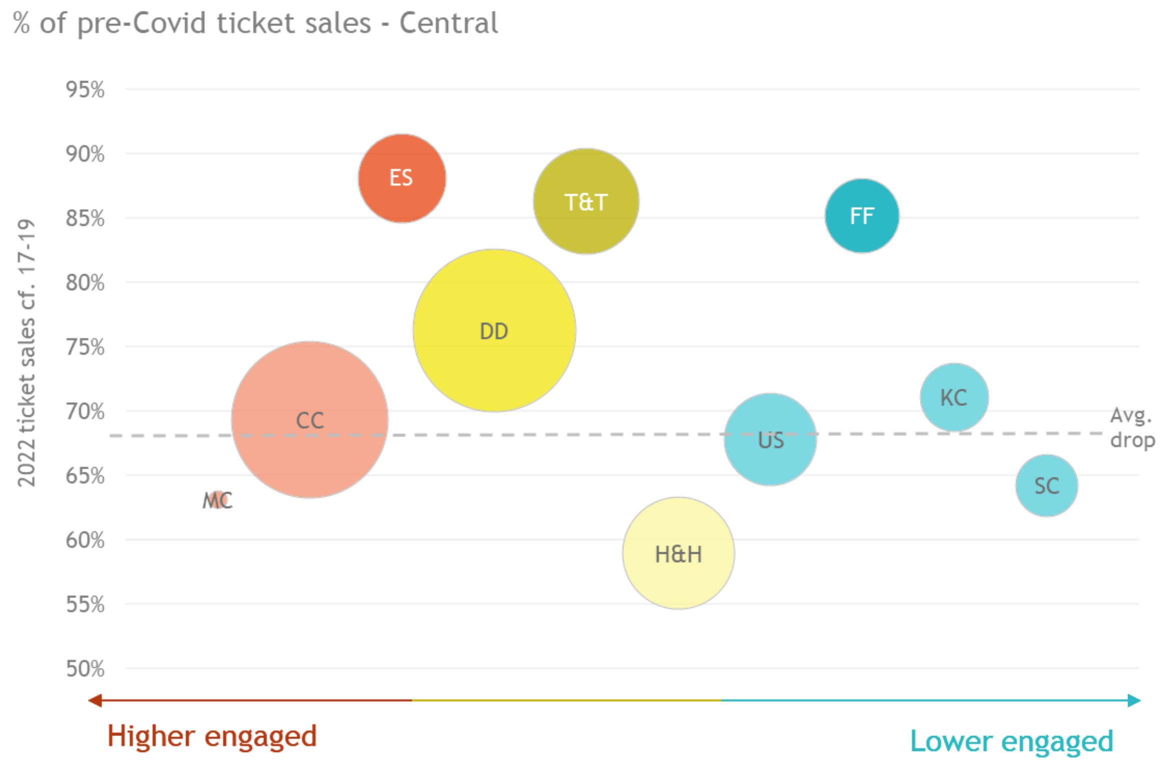


Appendix 5: Differences in ticket sales between venues in Edinburgh or Glasgow

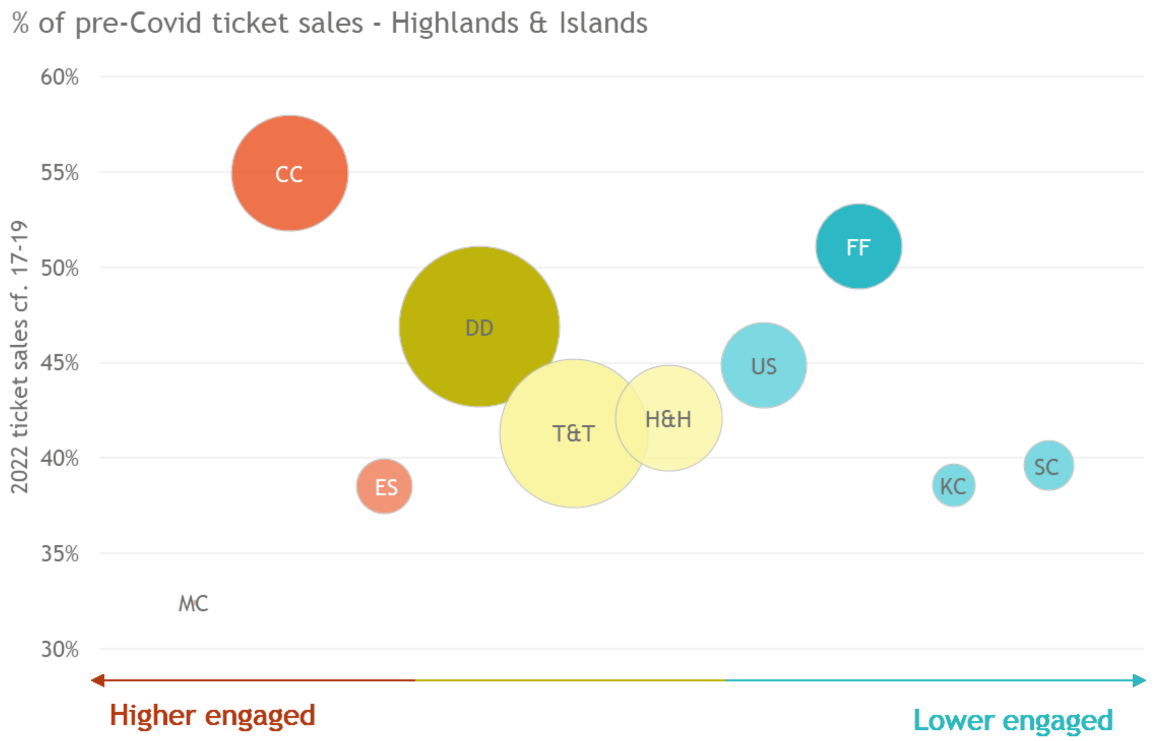


Appendix 6: Change in ticket sales by segment and ticket volume - by region

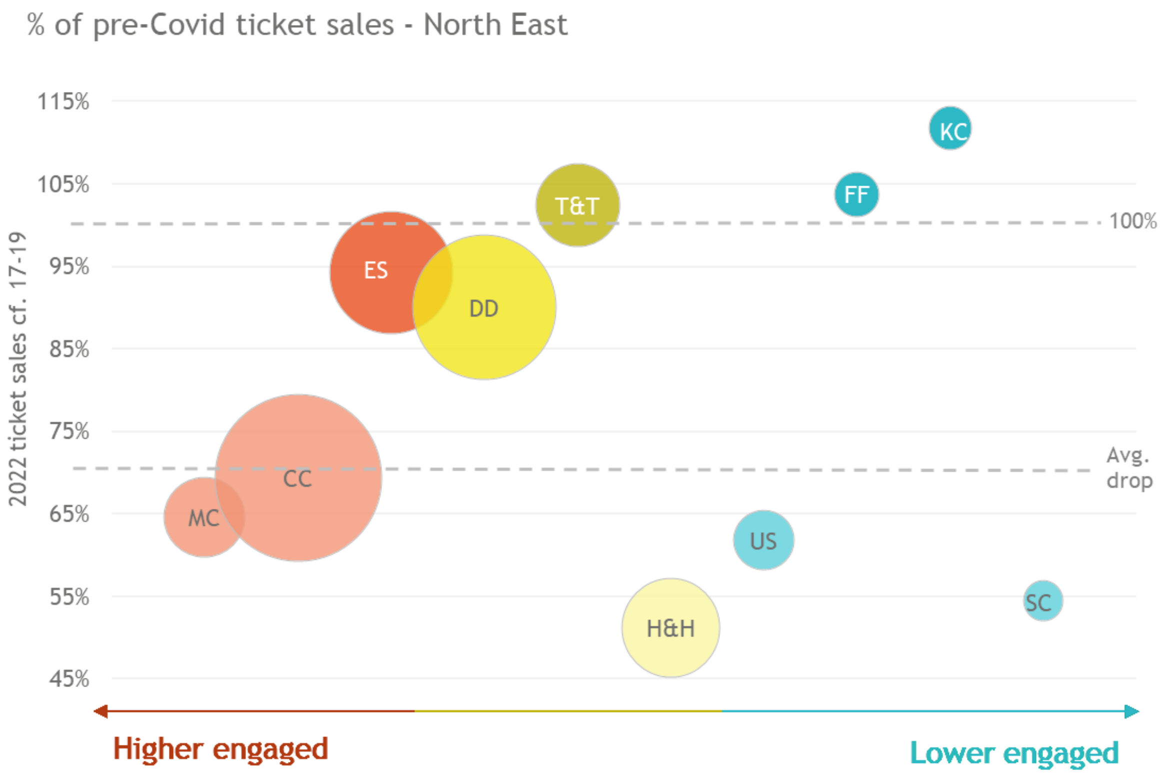
Central Scotland



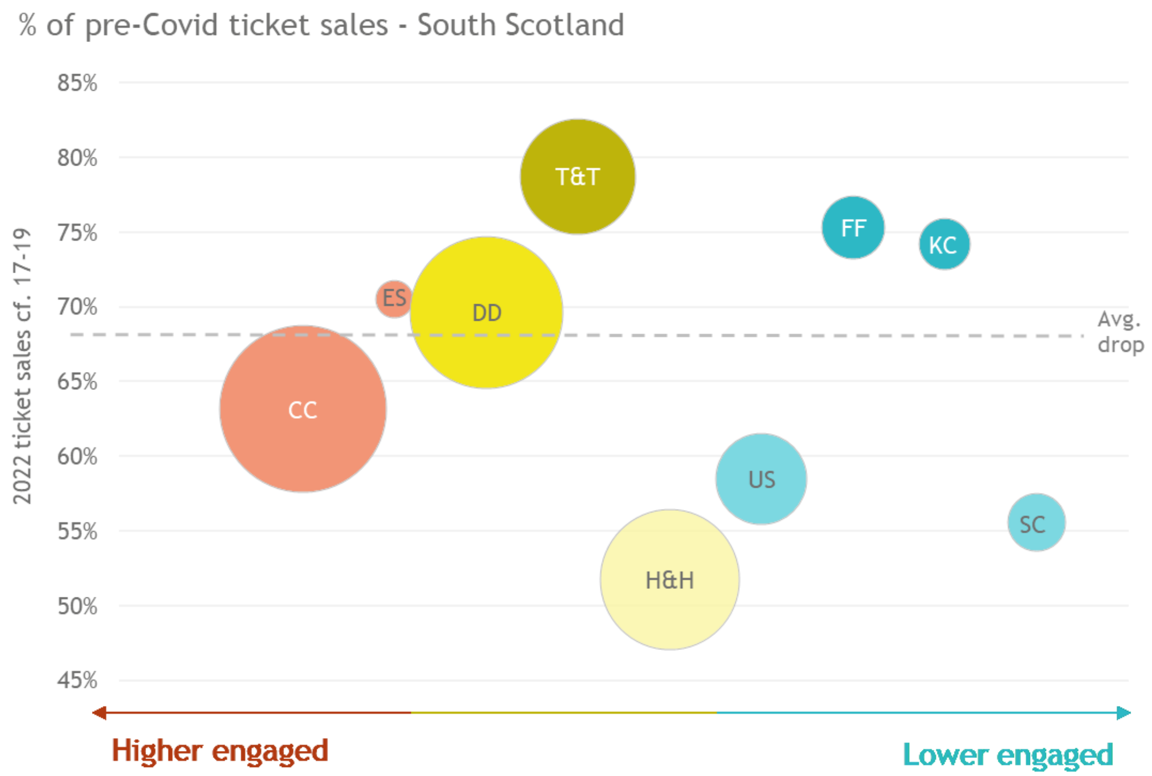
Highlands & Islands



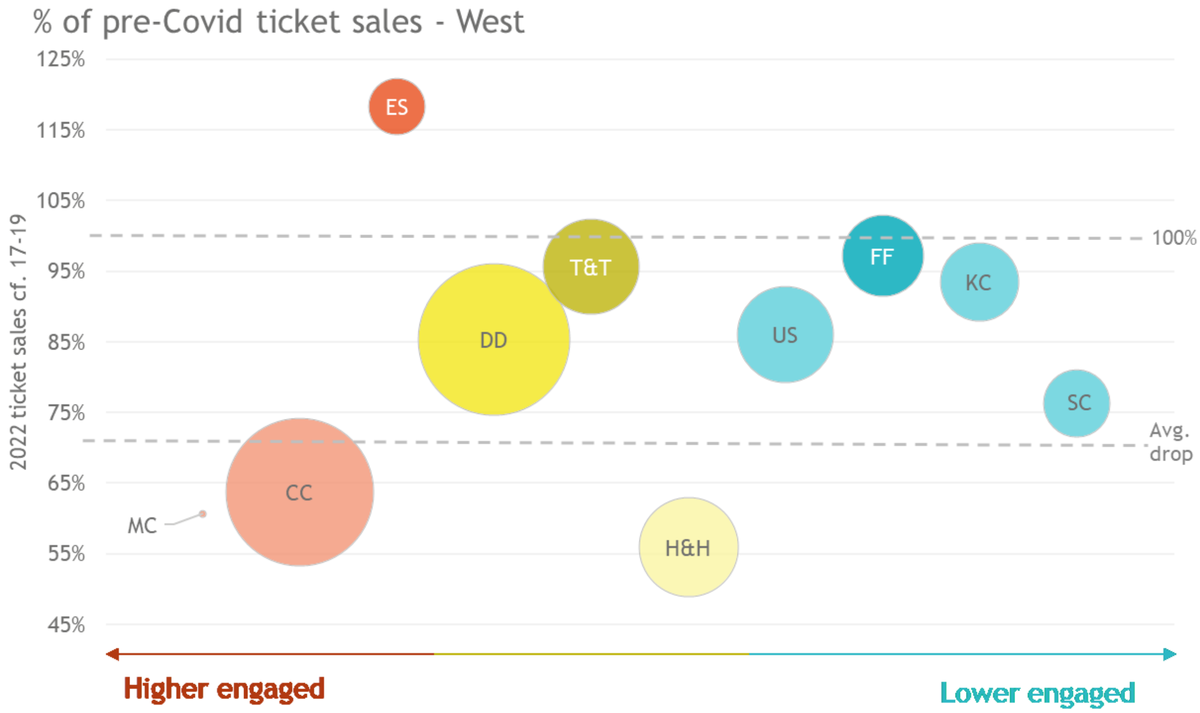
North East Scotland



South Scotland



West Scotland



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