in partnership with SPEKTRIX

Tomorrow's Audience

Deepening understanding of first-time attenders to build the loyal audiences of tomorrow.

Report – March 2024

in association with a consortium of many of the UK's leading arts organisations

Katy Raines & Kerry Radden - Indigo Ltd | **Liv Nilssen – Spektrix** January 2024

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Introduction from Indigo

indigo

Katy Raines
Founder & CEO

In Autumn 2023, we met with the CEOs of a whole host of cultural organisations who remained concerned by the shifting sands of post-lockdown audiences for the performing arts. They could see that not all pre-Covid loyal audiences had returned – something we had also seen from our Missing Audiences work in 2022; yet there were anecdotal reports of more ‘new’ audiences attending.

Rather than covering old ground and speaking once again to those missing audiences from the past, we turned our attention to the ‘new’ attenders. The aim of *Tomorrow’s Audience* was to find out more about these new audiences: are there really more of them? Are they different from our previous audiences? How can we encourage more people like them to attend and – critically – to return? Do these new audiences have the potential to become the loyal audiences of tomorrow? We have framed this report around these questions, along with a series of others, that we and the commissioning venues wanted answers to.

As audience specialists, we want to empower the whole sector with an understanding of audiences. In partnership with Spektrix, we have been able to bring together long-term ticketing data trends, quantitative and qualitative audience insight from multiple organisations – and together we hope we can find ways to build a stronger sector.

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Introduction from research partner Spektrix

SPEKTRIX **Liv Nilssen**
Director of Sector Strategy

There is no doubt that tomorrow's audience differs from the audience of the past.

Post-lockdown, mounting evidence was becoming impossible to ignore. Across the UK, arts and cultural organisations have been reporting fewer familiar faces - but also many new ones. The Spektrix Ticket Sales Dashboard chronicled recovery in the overall numbers of tickets sold, building towards and eventually just beyond, 2019 levels. We also saw a surprising shift in the timing of purchases. Audiences seemed to be engaged, but they were new people, engaging in new ways.

Understanding audience behaviour is vital to the success of arts and cultural organisations, and there was growing evidence that these new audiences might represent a large and exciting opportunity. We knew something had changed, but what exactly – and why – was an open question (with plenty of theories).

This is why we were thrilled to collaborate with Indigo, with the support of the consortium of arts organisations, to find the answers the sector needs to understand, attract, and build relationships with tomorrow's audiences.

I'm excited by the answers we've discovered by combining the Spektrix aggregate data insights and Indigo's expertise with audience research. They give me hope that tomorrow's audiences are the key to a bright future for the arts and culture sector.

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Introduction from CEOs consortium

Julia Fawcett OBE
Chief Executive of The Lowry

Retention and growth of audiences is one of the most pressing issues in the performing arts today. When we first approached Indigo in Autumn 2023 to help us understand what was going on with audiences, we could see as a group of CEOs of some of the largest organisations in the UK that things weren't looking as good as we had hoped; it had been a tough first half of the year. We needed to understand how we could build those loyal audiences of the future to shore up our sustainability.

While we saw some great successes across much of the country in the second half of 2023, with many organisations outperforming expectations and a resurgence of audiences into theatres, concert halls and arts centres, we know that we still have to work harder than ever to attract new audiences to the arts and to demonstrate our impact on people, communities and the country.

However, we are a creative and collaborative industry that always faces challenges with optimism. Our future success depends on our audiences, and *Tomorrow's Audience* has offered us vital new insights. Armed with a deeper understanding of first-time audiences, we can do what we do best in our organisations: create ways to connect with people more meaningfully and introduce them to this wonderful world we are privileged to work in.

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Methodology

For *Tomorrow's Audience*, **Spektrix** analysed a large, anonymised data extract spanning over a decade of audience behaviour. This dataset is drawn from 319 Spektrix user organisations, together forming a representative sample of the UK arts and culture sector. These organisations vary in size from leading international arts centres to intimate local theatres, present a range of art forms, and represent all four nations of the UK.[1]

To gather audience insight, **Indigo** invited performing arts organisations (venues and touring companies) in the UK to participate in the *Tomorrow's Audience* survey. The research was funded by both Spektrix and a consortium of many of the UK's leading arts organisations; this financial support allowed the research to be available to any other performing arts organisation in the UK at zero cost.

Organisations were provided with a unique link to send out to a recommended sample of around 3,000 to 5,000 bookers on their database who had booked *for the first* time since the organisation re-opened after Covid lockdowns. The results from all organisations were then aggregated to form the baseline data set.

The survey ran for 3 weeks in October 2023 and during that month, 32,679 complete responses were gathered via 72 organisations.

Following initial analysis, online focus groups were then carried out in January with 15 audience members who had identified themselves as being in the "new-to-arts" category, recruited via the survey.

1. *For more detailed information on this data and our methodology please see Appendices.*

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Tomorrow's Audience: Participating organisations

Ayr Gaiety Partnership
Barbican Centre
Birmingham Hippodrome
Birmingham Rep
Birmingham Royal Ballet
Bradford Theatres
Bristol Beacon
Bristol Old Vic
Britten Pears Arts
Byre Theatre, University of St Andrews
Capital Theatres
Chelmsford Theatre
Chichester Festival Theatre
Corn Exchange Newbury
Eden Court Highlands
English National Ballet
English National Opera
English Touring Opera
Exeter Northcott Theatre
Floral Pavilion Theatre
Garsington Opera
Glyndebourne
Hall for Cornwall
Hull Theatres
Hull Truck Theatre
Leeds Heritage Theatres
London Philharmonic Orchestra
London Symphony Orchestra
Manchester Camerata
Mayflower Theatre and MAST Mayflower Studios
Millennium Forum
Miracle Theatre
Music at Oxford
National Theatre of Scotland
NEC Group
Northern Ballet
Northern Chamber Orchestra
Octagon Theatre
Opera North
OSO Art Centre
Oxford Playhouse
Philharmonia Orchestra
Rambert
Regent's Park Open Air Theatre
Rose Theatre
Roundhouse
Royal Albert Hall
Royal Exchange Theatre
Royal Opera House
Royal Philharmonic Orchestra
Royal Scottish National Orchestra
Royal Shakespeare Company
Sadler's Wells
Shakespeare's Globe
Sherman Theatre
Southbank Centre
Stratford East
Swansea Grand Theatre
Talawa Theatre Company
Taliesin Arts Centre
The Glasshouse International Centre for Music
The Lowry Centre
The MAC
The Market Place Theatre
The Old Vic
Theatre Royal Bury St Edmunds
Theatre Royal Plymouth
Three Choirs Festival
Warwick Arts Centre
Watermans
Welsh National Opera
Yvonne Arnaud Theatre

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Tomorrow's Audience: Summary of respondents

Aggregated ticketing data

340 Organisations

10+ Trend years

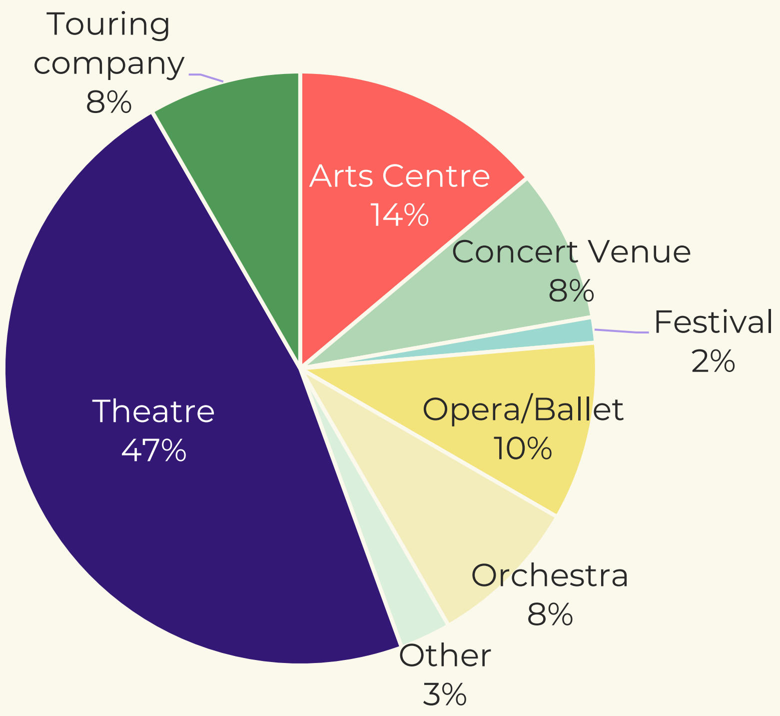
SPEKTRIX

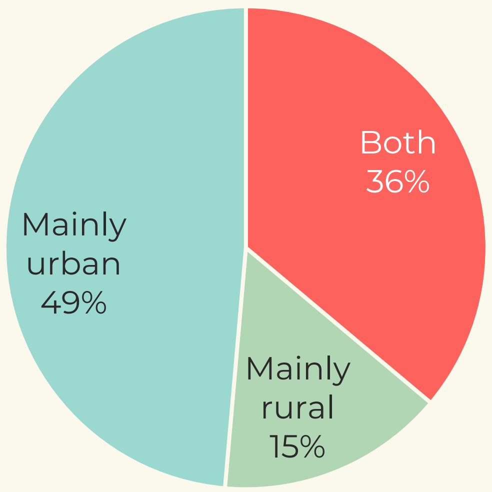
Survey and focus group overview

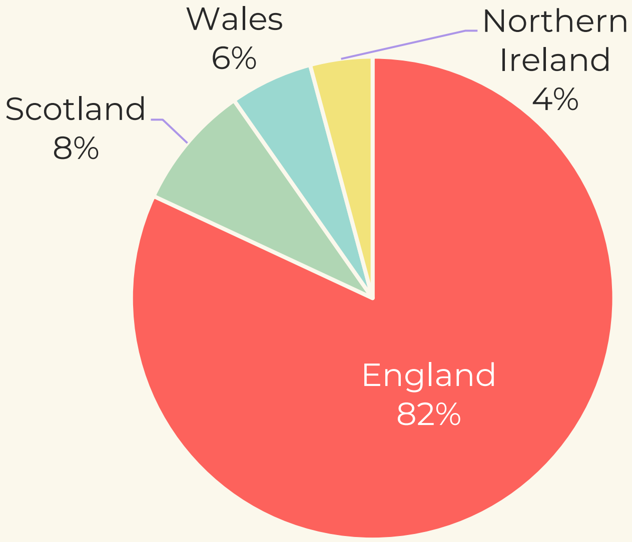
72 Participating organisations

32,677 Audience responses

15 New-to-arts audience members in focus groups







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Tomorrow's Audience
Full results

- **Section 1**: Are there more first-time bookers post-lockdown?
- **Section 2**: Are first-time bookers returning?
- **Section 3**: Does first-time booker equal first-time attender?
- **Section 4**: Are first-time attenders different from returning attenders?
- **Section 5**: What do first-timers get from their experience?
- **Section 6**: What are the motivations and barriers for first-time attenders?
- **Section 7**: What will get first-timers to attend and then return?
- **Section 8**: Summary and recommendations

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Section 1

Are there more first-time bookers post-lockdown?

Anecdotal reports from many arts organisations are that they are seeing high numbers of first-time audiences, but is this supported by the data?

Key findings:

- More people than ever before booked for arts and cultural events in 2023.
- More than half of audiences in 2023 were first-time bookers.

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Definitions

All bookers

Individuals who purchased a ticket to a given organisation in the calendar year in question. Our data looks at the date of purchase regardless of the date of the event.

First-time bookers (first-timers)

Individuals who purchased their first ever ticket to a given organisation in the calendar year in question (though this purchase will not necessarily be their first ever attendance). When we talk about all bookers, this includes first-time bookers alongside all other ticket bookers.

One-year retention

Individuals who purchased a ticket in the calendar year in question and subsequently purchased a ticket in the following calendar year from the same organisation. For example, 19.5% of first-time bookers in 2022 returned in 2023; this is the data point represented on the charts for 2023.

A note on aggregate data

Aggregate data can't replace individual organisations' knowledge of their own audience behaviours, or the priorities of their own communities. It can play a vital role in identifying broader patterns, analysing trends, and helping individual decision makers map the trends in their own data to the changes that continue to transform the sector and society.

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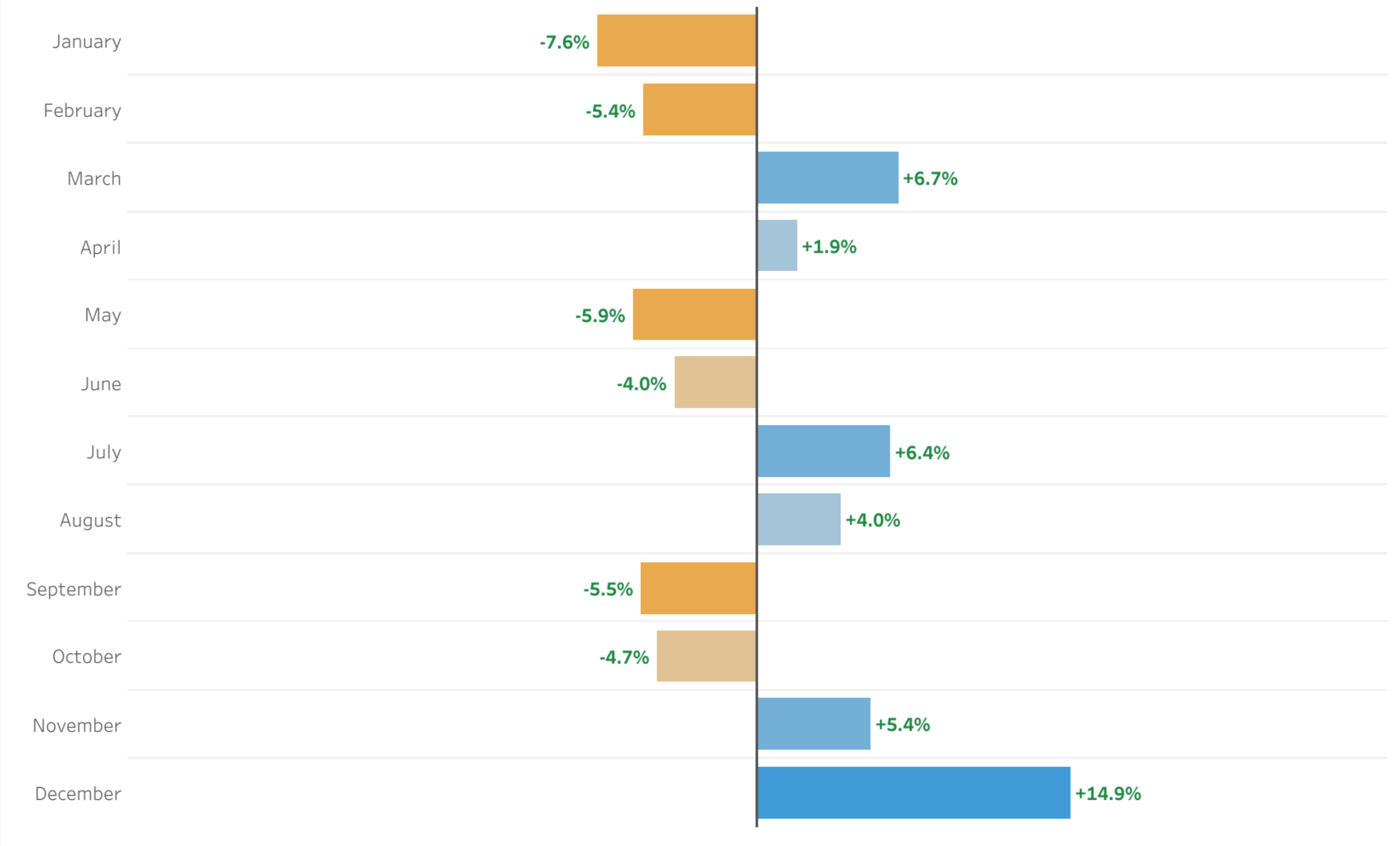
More people than ever before booked for arts and cultural events in 2023.

Comparison of ticket sales by month, 2023 vs 2019



Overall ticket sales for the year were fractionally higher than 2019, which was the previous highest year in our records. 2023 ticket sales ending the year at 101.6% of 2019 sales.
That may seem a small difference - but given that sales in January 2023 were just 92.4% of the same month in 2019, it represents a remarkable recovery.

We also found that the median organisation in our data set saw a record high number of bookers in 2023.

In the chart on the left, orange bars to the left show sales that are lower in 2023 than in 2019; blue bars to the right show sales that are higher in 2023 than in 2019.

Source: Spektrix ticket sales dashboard

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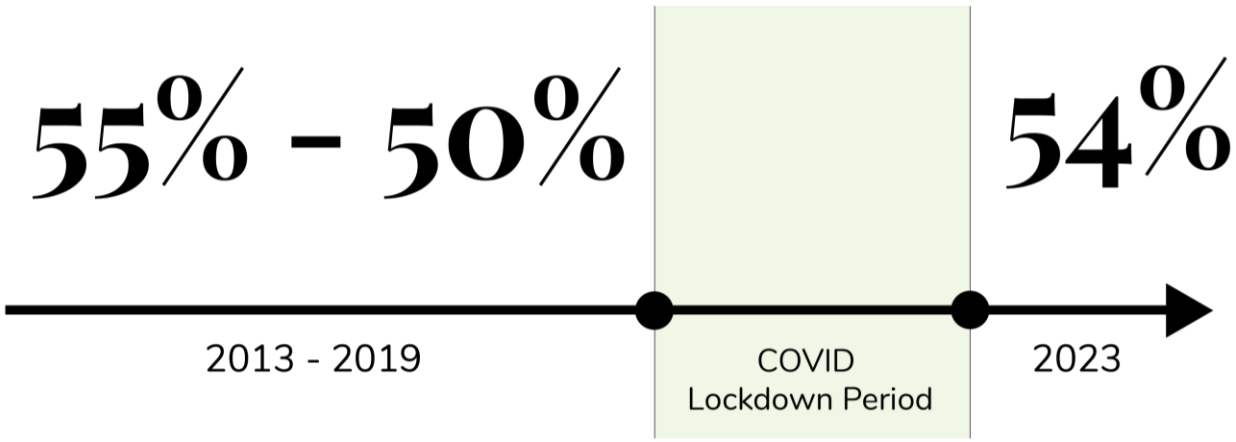
More than half of all bookers in 2023 were first-timers.

Proportion of all ticket buyers who were first-time ticket buyers[1]



1. *Value for median organisation*

In 2023, first-time bookers comprised **54%** of all bookers, which is very close to an all-time high.

Over the last decade, first-timers have consistently made up at least half of all bookers, but that number was slowly reducing, from **55%** in 2013 to just **50%** in 2019.

First-timers have always been essential to arts organisations' revenue, and since lockdown they've become more important still.

As a whole, the sector saw high numbers of bookers and near-record proportions of first-timers in 2023. For many organisations, this will have meant a substantial influx of first-time bookers boosting attendances and revenue.

Of course, our data is based on median numbers, so not every organisation will follow the same pattern. Some may have seen more transactions but fewer first-timers; others more new bookers, but a reduction in overall sales. Some may have a different trend entirely. What we do know is that attracting these first-time bookers back presents a significant growth opportunity for the arts and cultural sector in 2024.

Strategies to engage first-timers, retain them for a second visit, and capitalise on their interest will lie at the heart of many organisations' plans to build the audiences of tomorrow.

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Section 2

Are first-time bookers returning?

We are seeing large numbers of first-time bookers post-lockdown, but are they coming back for second and subsequent visits?

Key findings:

- Pre-lockdown, retention rates of arts audiences were diminishing steadily.
- Lockdown fluctuations had little lasting impact on overall reattendance trends.
- In 2023, retention rates of first-time bookers were significantly better than expected.
- The largest organisations saw a steeper decrease in reattendance than the smallest.
- Organisations outside London saw a steeper decline, but a stronger recovery.

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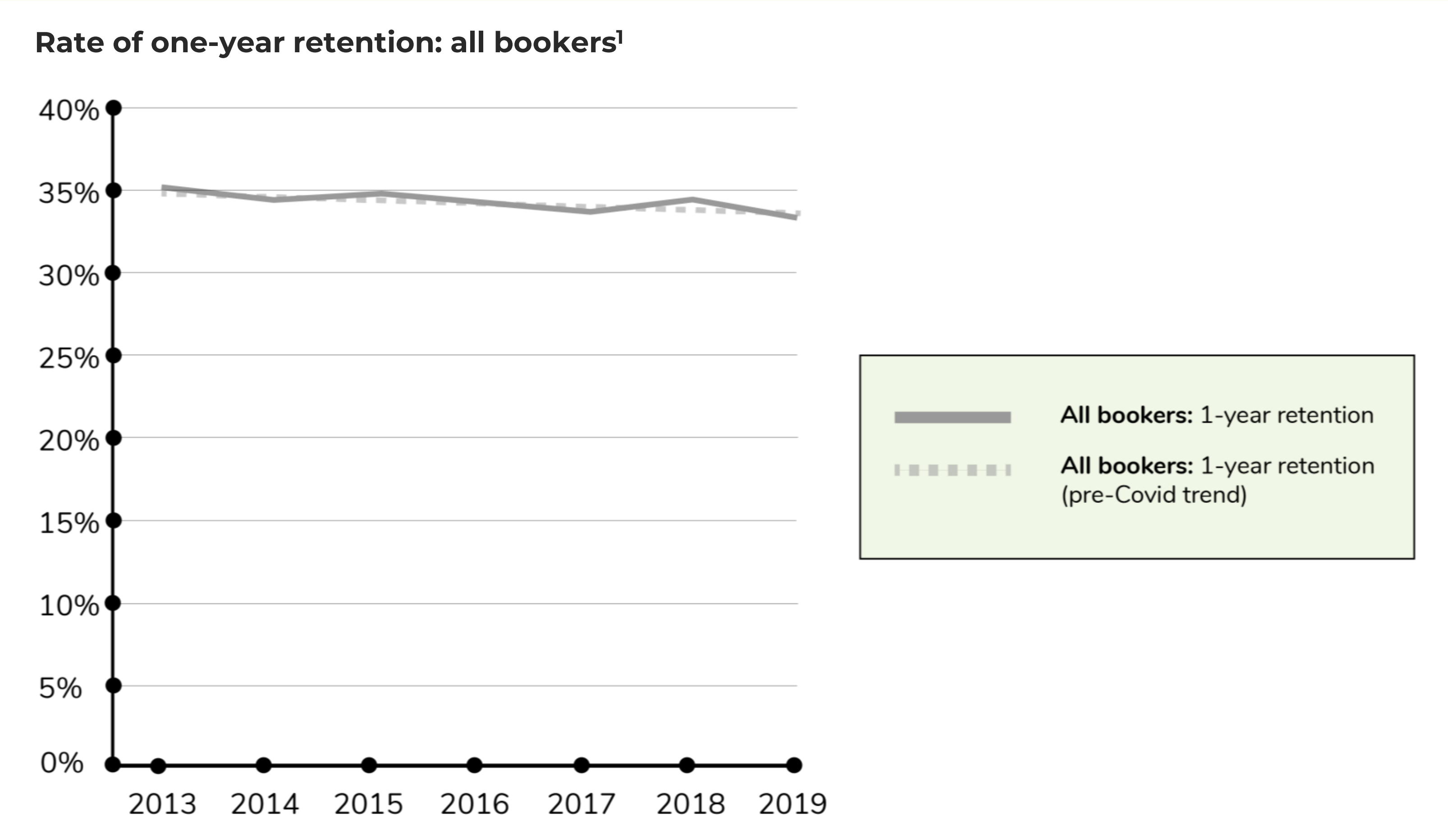
Retention rates of all bookers continued a decade-long decline.



Pre-Covid trends indicate a concerning pattern regarding the one-year retention of ticket bookers.

From 2013-2019, there was a consistent decline in the number of ticket bookers returning after one year – in other words, people who bought a ticket in one year, and booked again with the same organisation in the following year.

1. Value for median organisation

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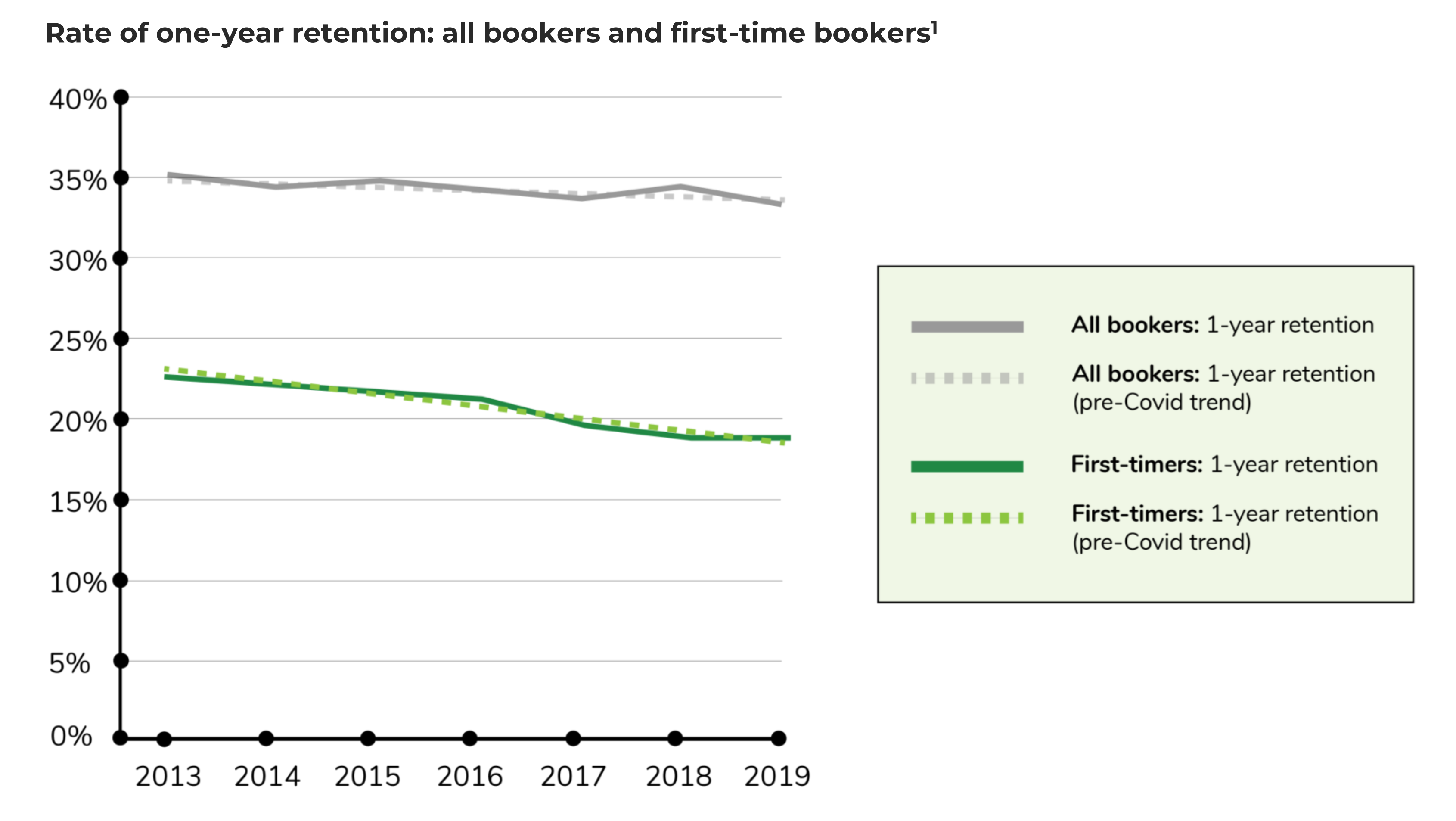
Retention rates of first-time bookers were declining faster still.



When we look at first-time bookers in isolation, we paint an even bleaker picture. The number of first-timers returning after one year was lower, and declining faster, than overall audience trends.

Given the greater challenge of enticing a first-time booker back for a second visit, it was expected that first-time booker retention rates would be lower. However, the steeper rate of decline in retention was unexpected and concerning.

For at least ten years, we witnessed a rapid acceleration in the loss of audiences after their initial booking. Considering that first-time bookers constitute a significant portion of all bookers), these declining retention rates are a significant driver of the overall decline in audience retention.

1. *Value for median organisation*

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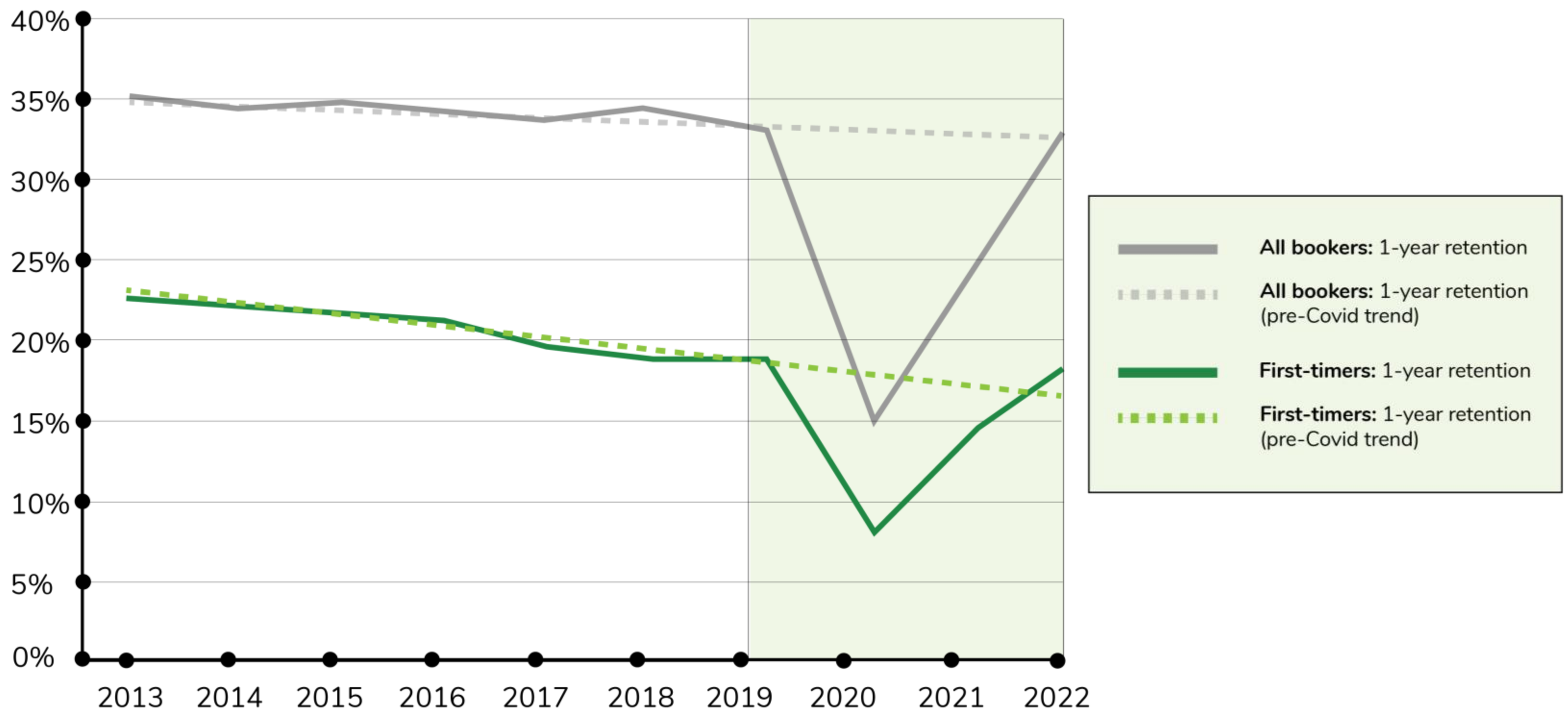
Lockdown fluctuations had little lasting impact on overall reattendance trends.

Rate of one-year retention: all bookers and first-time bookers[1]



To establish a post-lockdown benchmark for retention, we developed a method to estimate what retention patterns might have looked like without Covid-19 disruptions. The dotted lines on the graph represent this estimation, extending pre-Covid trends throughout the lockdown years. It goes without saying that the lockdown period (2020-2022) brought about unprecedented challenges for the sector, leading to wild fluctuations in audience behaviour. The sharp dip and rebound in this chart represents the disruptive nature of the lockdown period, when the overall size of audiences was tiny, events were mostly remote, and engagement centred on the most loyal supporters.

For the purpose of analysing long-term trends or establishing lasting benchmarks, these lockdown-period audiences contribute little meaningful data and introduce significant noise.

1. Value for median organisation

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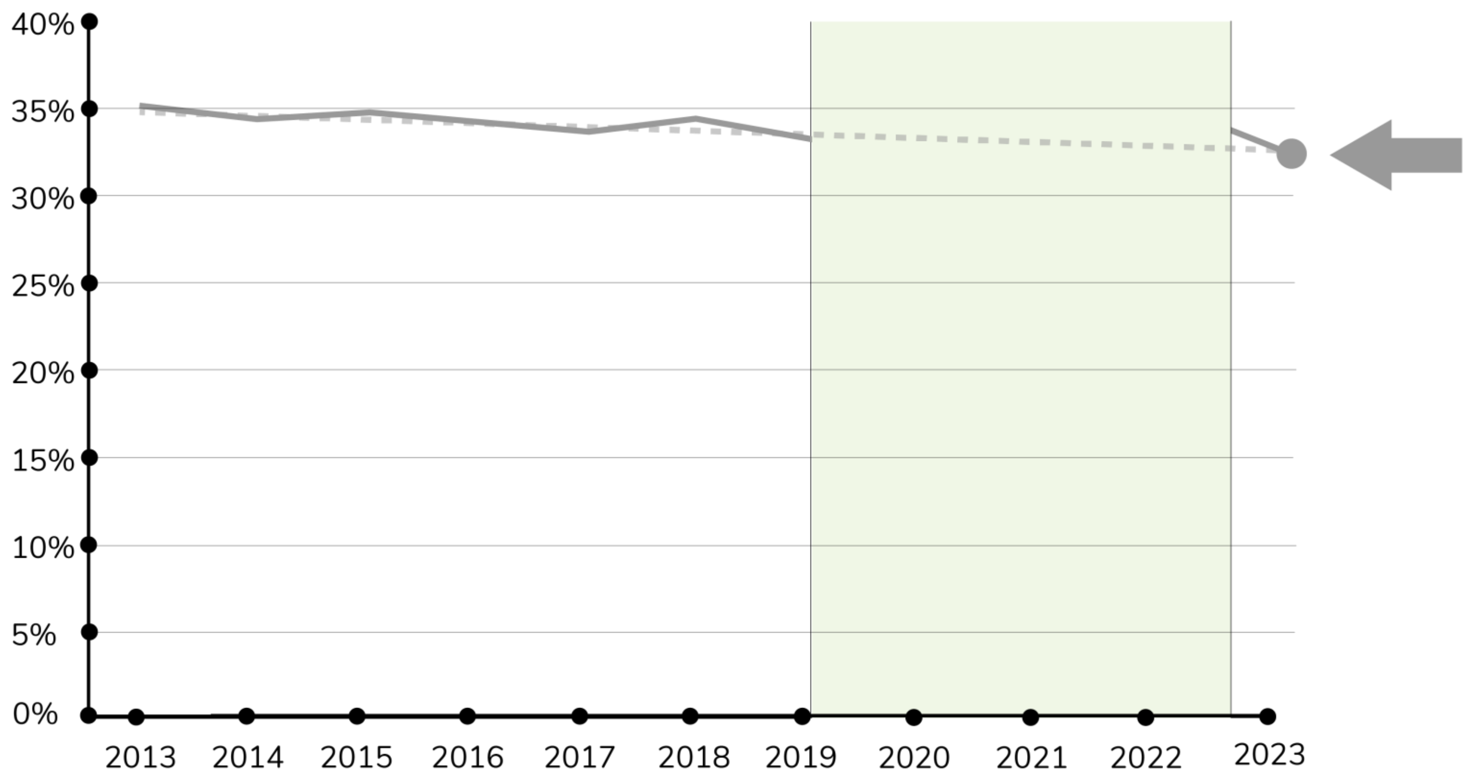
2023 retention of all bookers aligns perfectly with the long-term trend.

One-year retention trend: all bookers[1]



For all bookers, the retention trend in 2023 aligns perfectly with the pre-Covid trend line.

There's been a lot of talk about a loss of loyal audiences since lockdowns, but this method of tracking data through lockdown shows that the change is not solely attributable to Covid-19. Instead, it's the continuation of the longstanding trend that began at least ten years ago.

1. Value for median organisation

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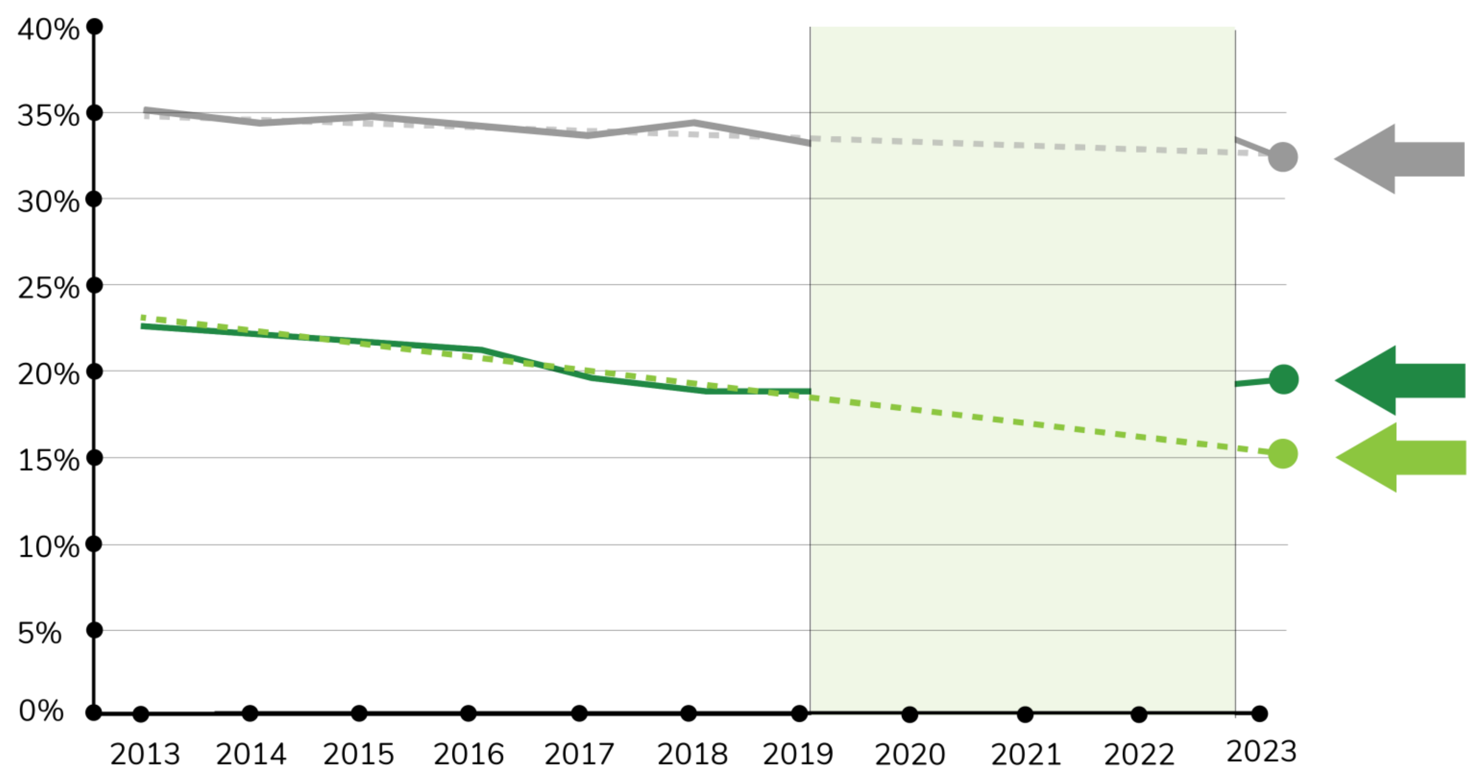
In 2023, retention rates of first-time bookers were significantly better than expected, showing green shoots of hope for arts audience growth.

One-year retention trend: all bookers and first-time bookers[1]



The green line on this chart shows the retention rates for first-time bookers from 2022 into 2023. The light green arrow tells us where we expected to be in 2023: pre-lockdown trends told us that just **15%** of audience members who first booked in 2022, should have returned in 2023.

However – following a decade-long decline – one-year reattendance by first-time bookers is trending upwards since lockdown. **19.5%** of new bookers from 2022 returned in 2023, a rate of reattendance not seen since 2016.

Considering that the historic trend was even more pessimistic for first-time bookers, these findings are particularly exciting.

The post-lockdown bump in first-time booker retention could offer a route out of a prolonged period of decline, in which audiences embrace the unique experience of live performance in a digital age, and organisations adapt traditional practices to meet their changing needs.

1. *Value for median organisation*

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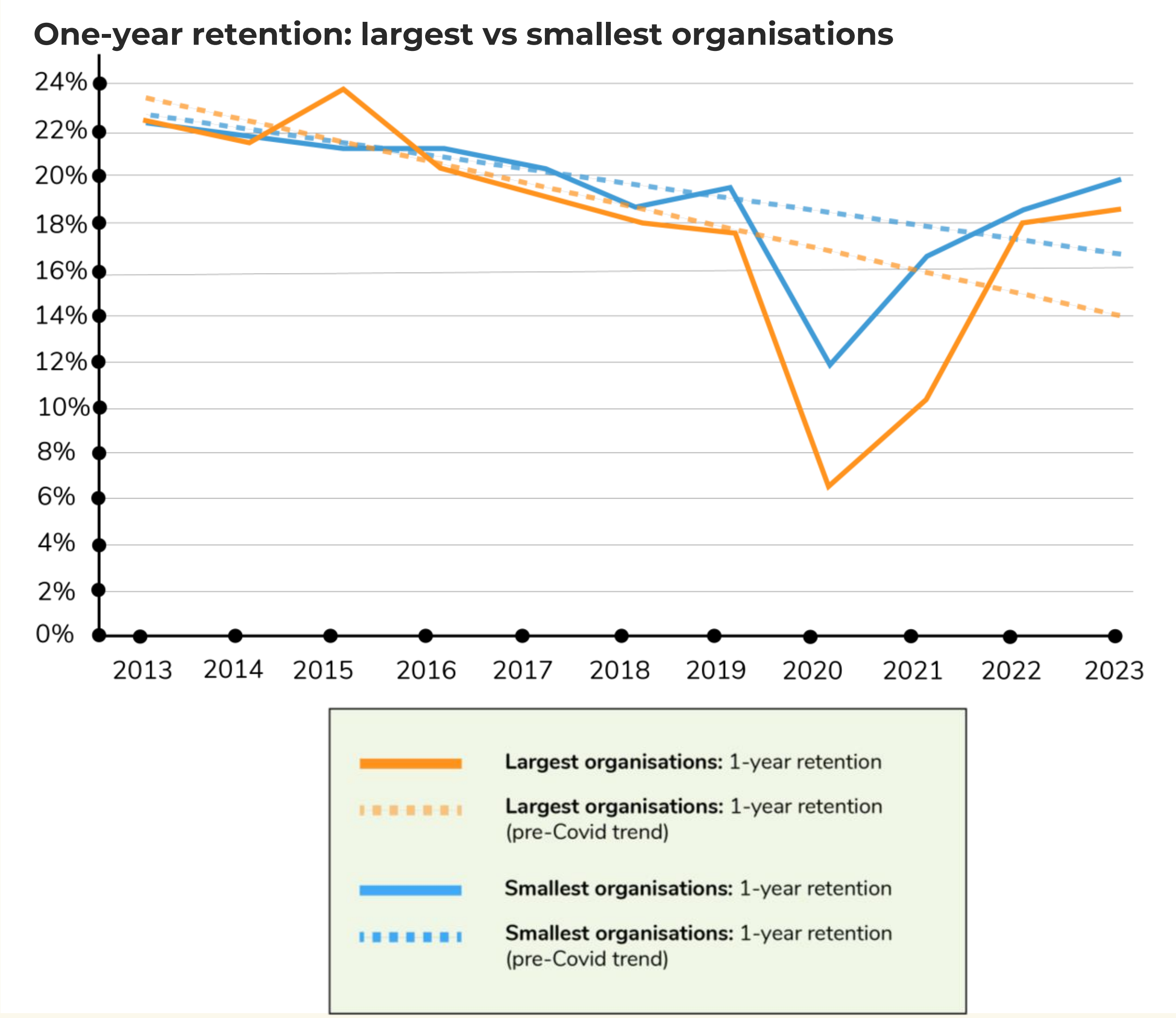
The largest organisations saw a steeper decrease in reattendance than the smallest



From a similar starting point in 2013 until lockdown in 2020, larger organisations saw a steeper decrease in first time booker retention than smaller organisations. Retention rates for both groups recovered in 2023, with reattendance at smaller organisations improving slightly faster, and to slightly higher levels.

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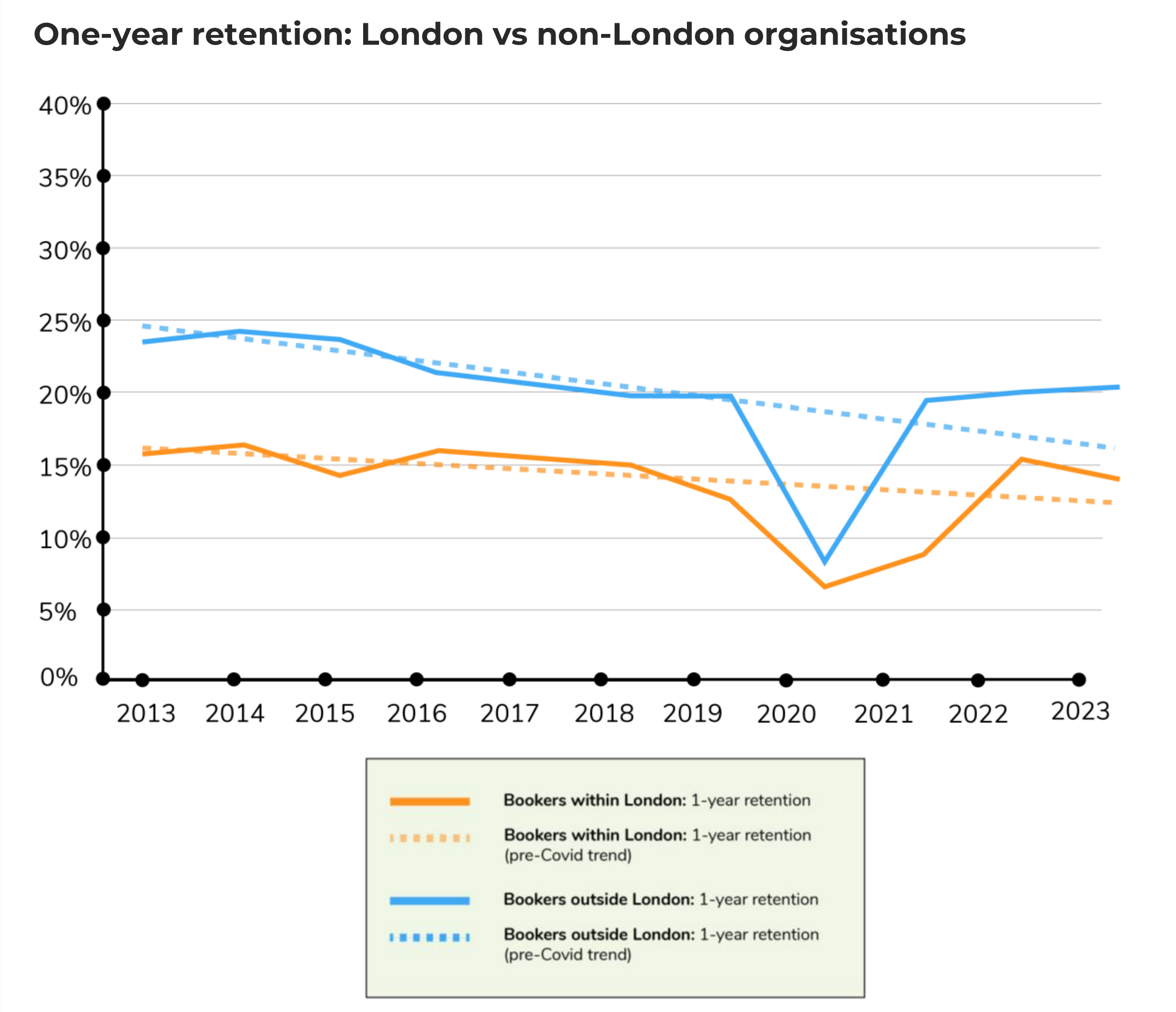
Organisations outside London saw a steeper decline, but a stronger recovery.



Organisations inside London have significantly lower retention of first-time bookers than those outside London, but until 2019, the decline in audiences outside the capital was declining faster – so much so that trendlines would have converged within a few years.

In 2023, organisations outside London saw a strong recovery, with more than **20%** of first-time bookers returning to the arts. Organisations within London were the only group to show a less decisive trendline. Reattendance in 2023 recovered to just above 2019 levels.

Of around 30 organisations in the 'Largest' dataset, one third were based in London, meaning there's little correlation between organisation size and location.

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Section 3

Does first-time booker equal first-time attender?

Participating organisations sent the survey to those on their database who appeared to be first-time bookers. We wanted to know if these people really were first-time attenders to the organisation.

Key findings:

- **62%** of first-time *bookers* (on average) had in fact attended the organisation before.
- **20%** of first-time *attenders* to organisations (on average) were new to the arts, having never or only rarely attended performing arts organisations before the pandemic.
- Theatres and arts centres attracted the highest proportion of audiences who were completely new to the arts.
- London first-time attenders were more likely to be already culturally-engaged than audiences across the rest of the UK.

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We found that many audience members who appeared to be first-time bookers on organisations' CRM systems had in fact attended the organisation before

All first-time bookers
Customers who have no previous booking on organisations' ticketing system

These bookers were emailed with the survey link, then asked within the survey whether they had attended that organisation before.

First-time attenders
First time to your organisation
38%

Arts-engaged but **new to you**
First time to the organisation but frequent arts attenders pre-Covid
80%

New to the arts
First time to the organisation and rare/never arts attenders pre-Covid
20%

First-time attenders were defined as those who said they had attended the organisation for the first time post-lockdown.

We split these into those who had attended the arts regularly before Covid (but not this organisation, so **new-to-you**) and those who never/very infrequently attended arts and culture before Covid (**new-to-the-arts**).

Note: Data differs from initial webinar due to change in calculation method to improve accuracy

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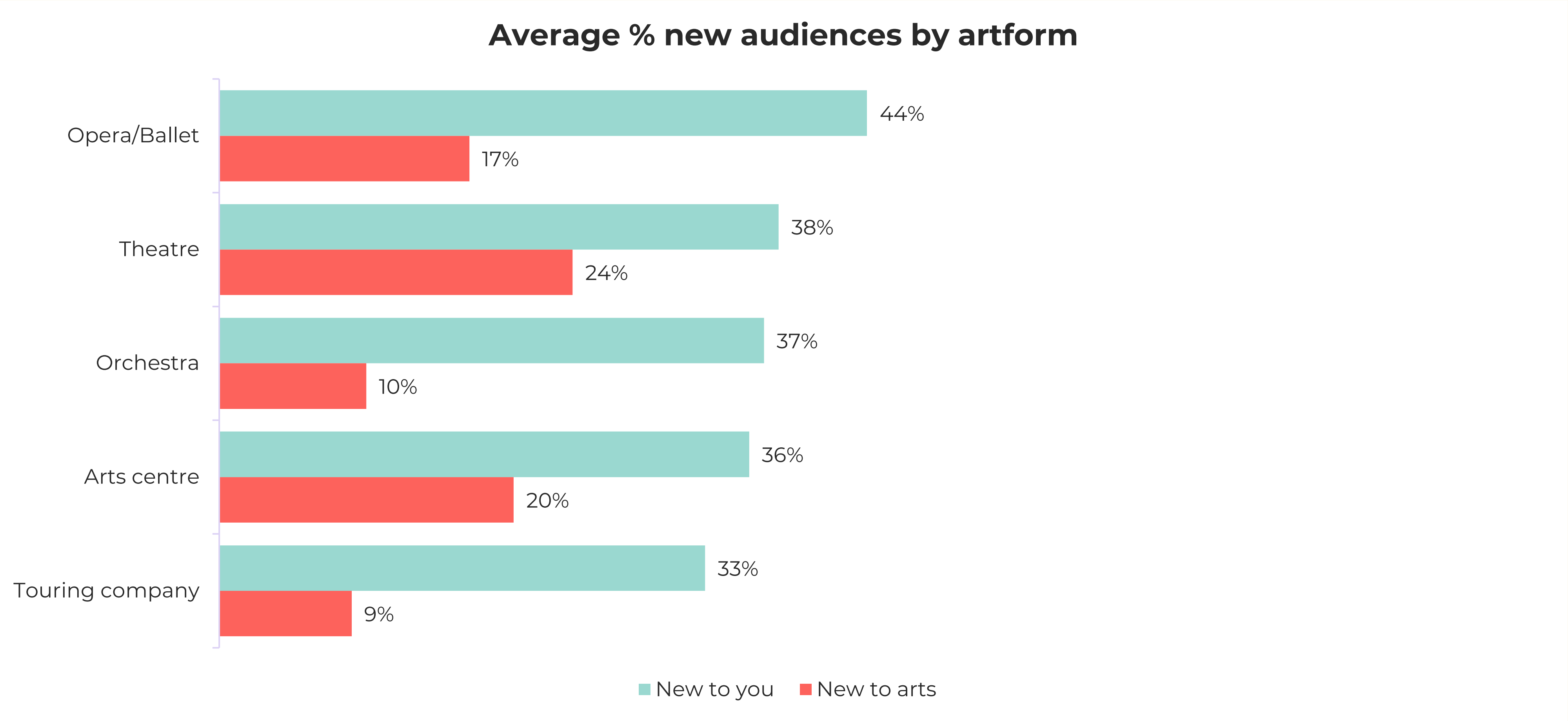
The rate of **new-to-you** and **new-to-the-arts** audiences varied by artform, with theatres and arts centres attracting the highest rate of audiences attending the arts for the first time.



Note: Average of averages to provide benchmarkable data point; minimum sample size in any category = 6

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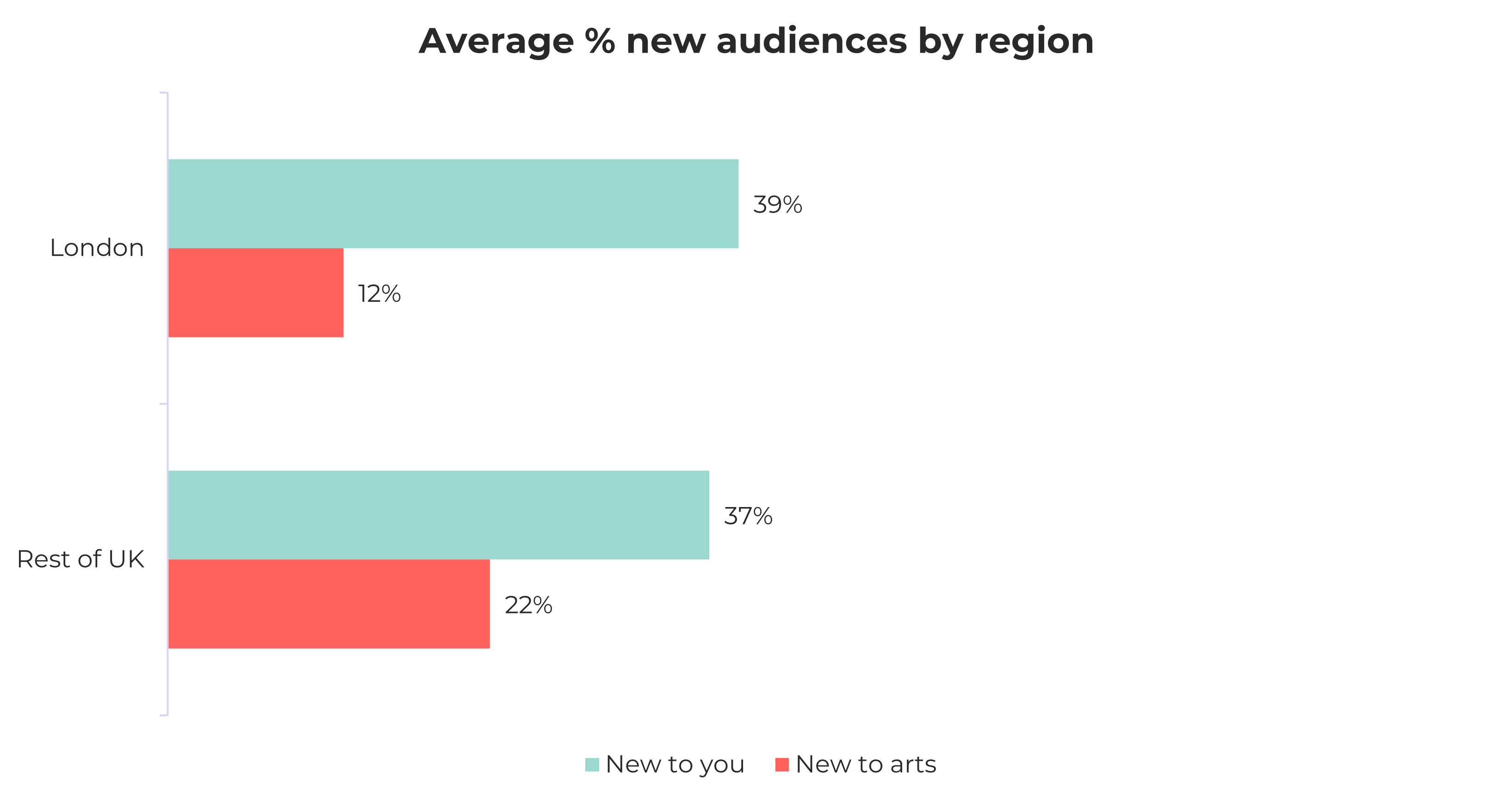
Meanwhile the density of the capital's arts provision means fewer London audiences are completely new to the arts, but both London and the rest of UK attracted similar proportions of audiences who were visiting the organisation for the first time.



Note: Average of averages to provide benchmarkable data point; minimum sample size in any category = 6

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Section 4

Are first-time attenders different from returning attenders?

Many assumptions exist about how first-time attenders are different from our “regular audiences” and we wanted to see if these assumptions were correct.

Key findings:

- **18%** of new-to-the-arts audiences were under 35, compared to 14% of those only new-to-you.
- New-to-the-arts audiences were slightly more diverse in terms of ethnic background, more so for those under 35.
- **29%** of new-to-the-arts audiences reported going out more often now than before Covid-19, rising to **37%** of under 35 new-to-the-arts audiences.

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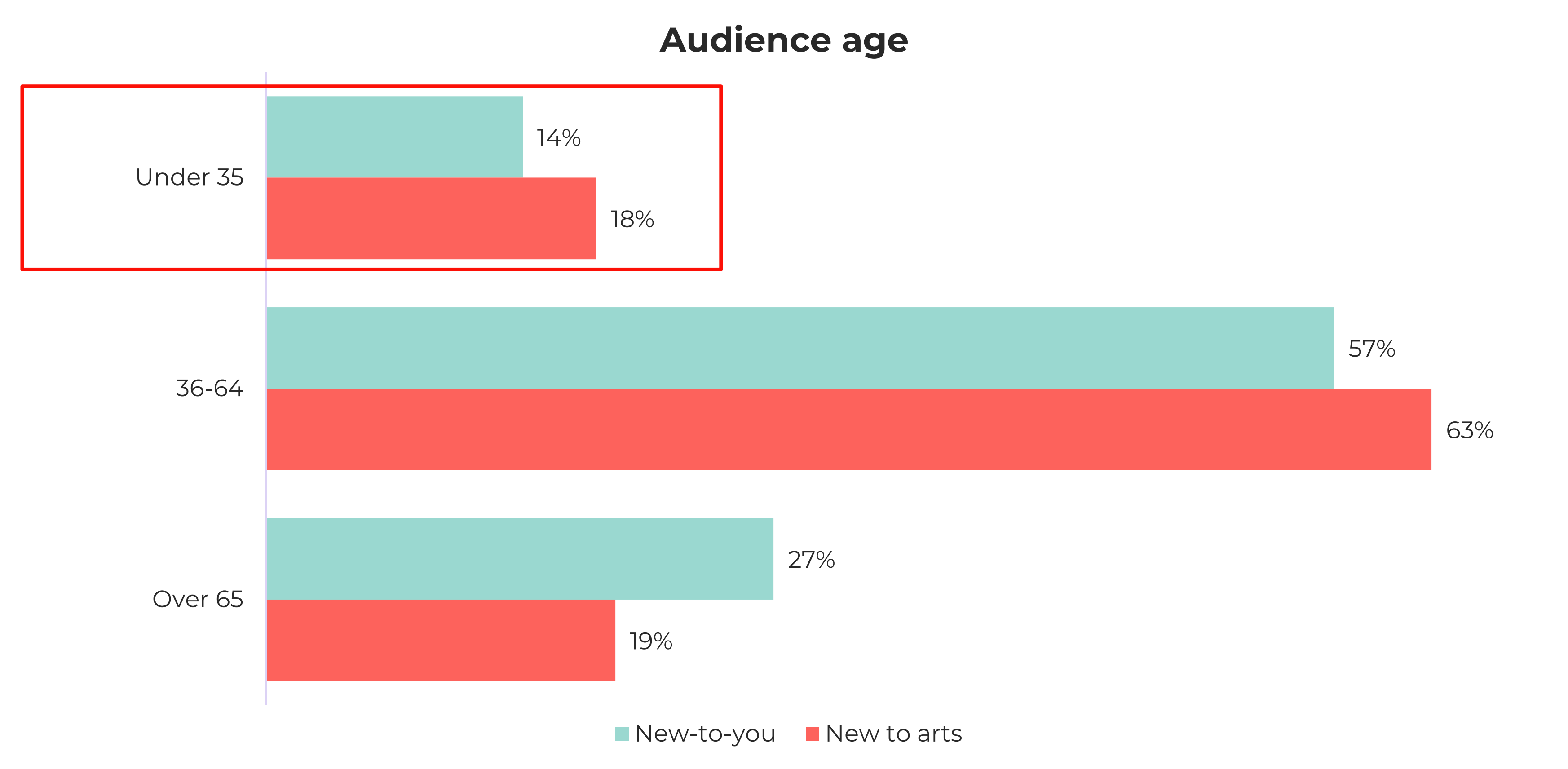
New-to-the-arts attenders skewed younger than those who were previously arts engaged, although they were not all young as is sometimes assumed. 18% were under 35, compared with 14% for the new-to-you audiences.



How old are you? n=8,787

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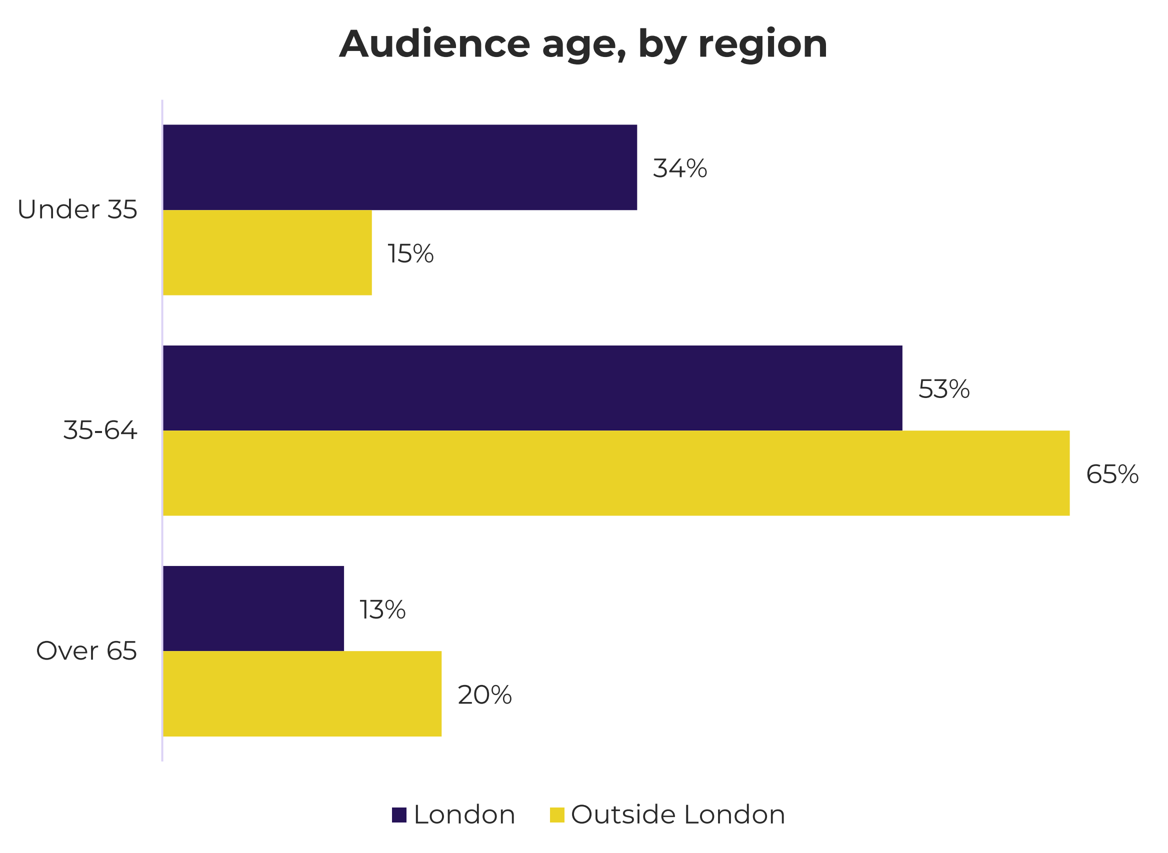
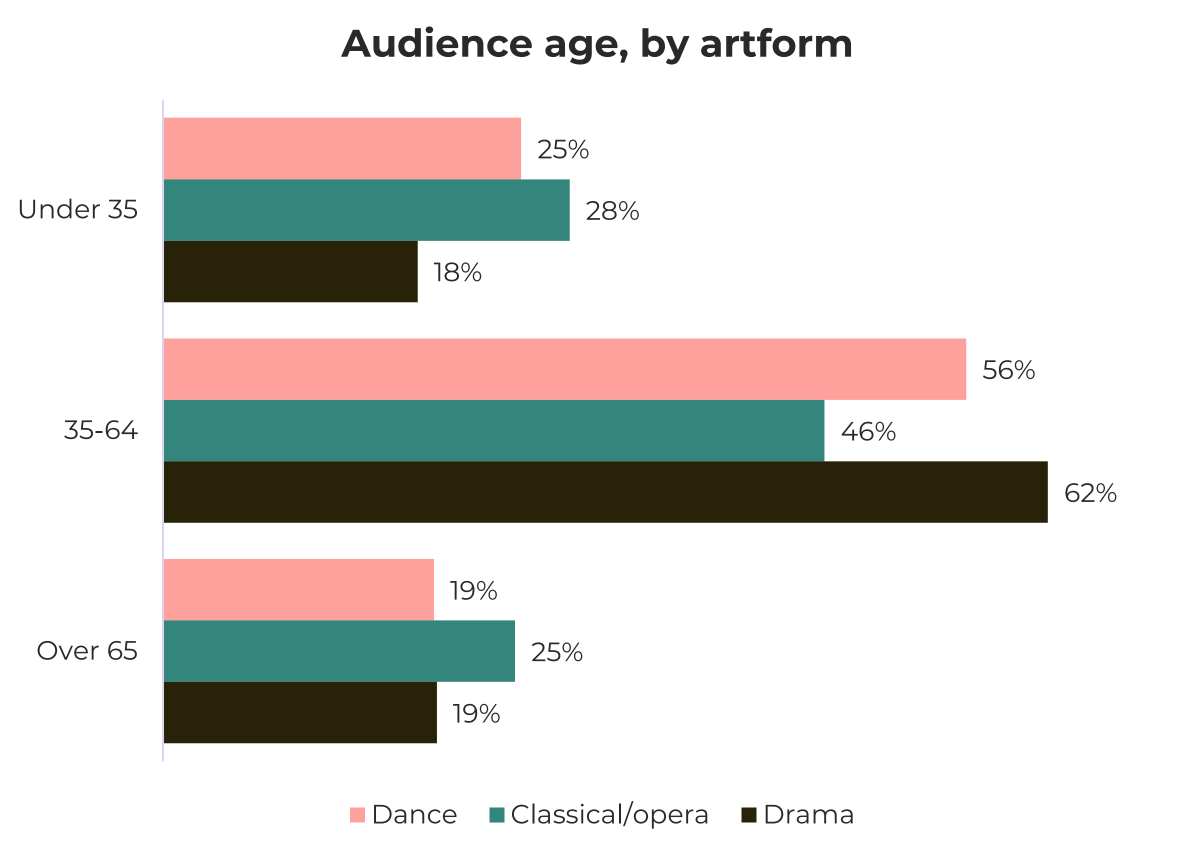
A significantly larger proportion of London audiences were under 35 than in other regions, while drama saw the lowest proportion of younger audiences[1]





Audience age by artform based on artform attended most often by the respondent

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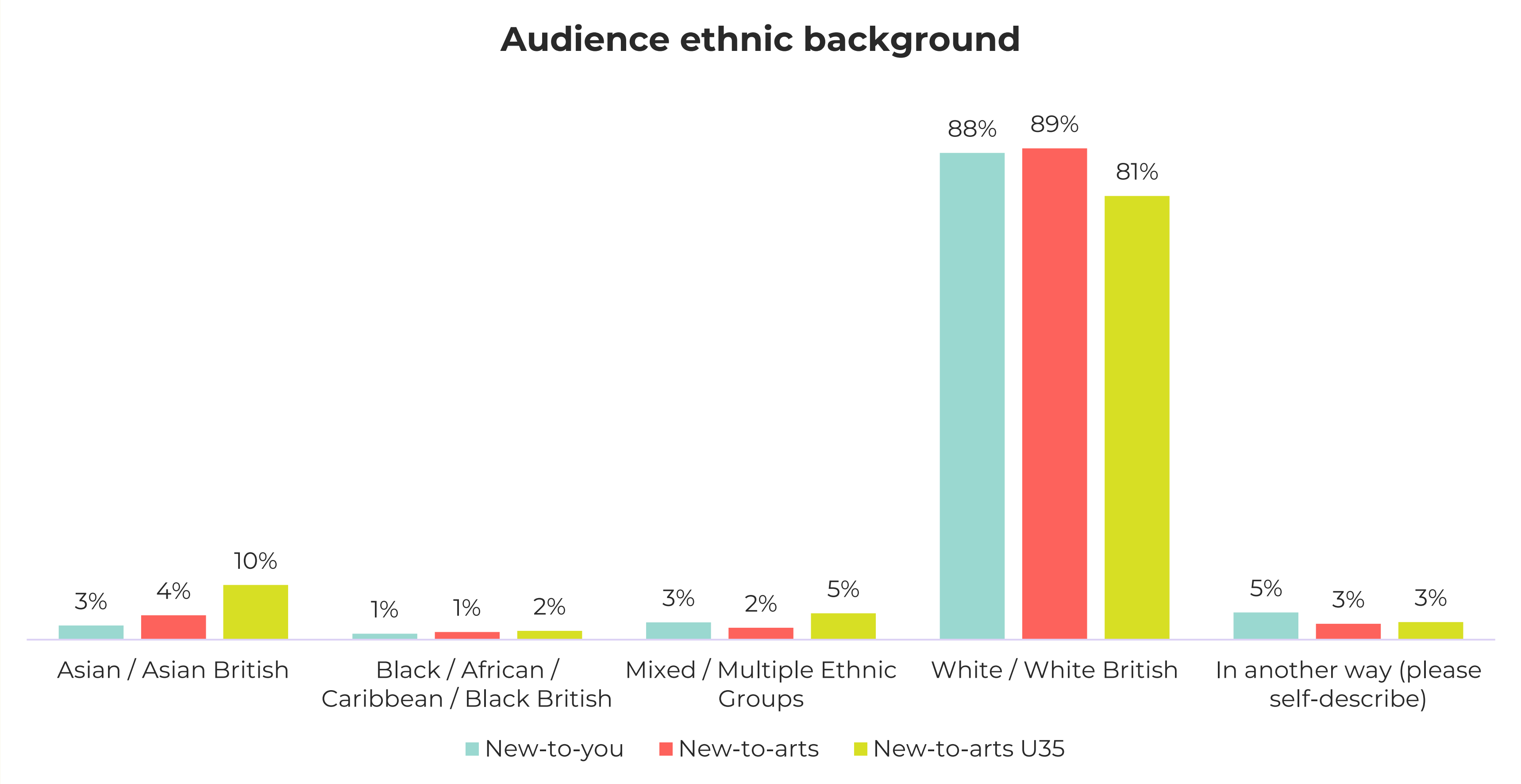
Although respondents were majority White or White British, younger new-to-the arts respondents were more diverse in terms of their ethnic background



How would you describe your ethnic background? (excluding Prefer not to say and recalculated) n=8,460

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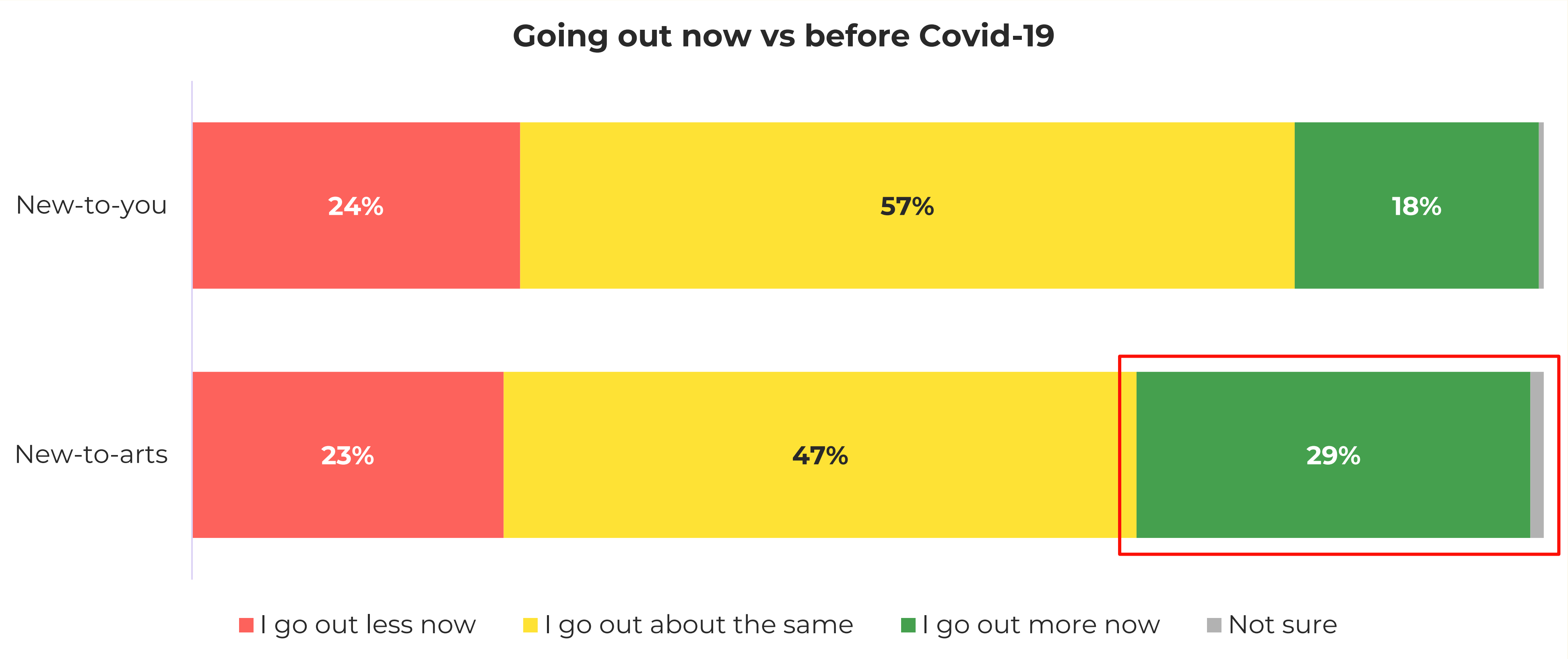
The majority of audiences had returned to pre-Covid levels of social activities. Compared to previously arts engaged new-to-you audiences, those within the new-to-the-arts segment were much more likely to report they were going out more often now than pre-Covid.



Thinking about how much you go out for social activities now, how does it compare with before the COVID-19 pandemic? Social activities include things like going out for a meal or to the pub, seeing a show, or going to the cinema. n=10,050

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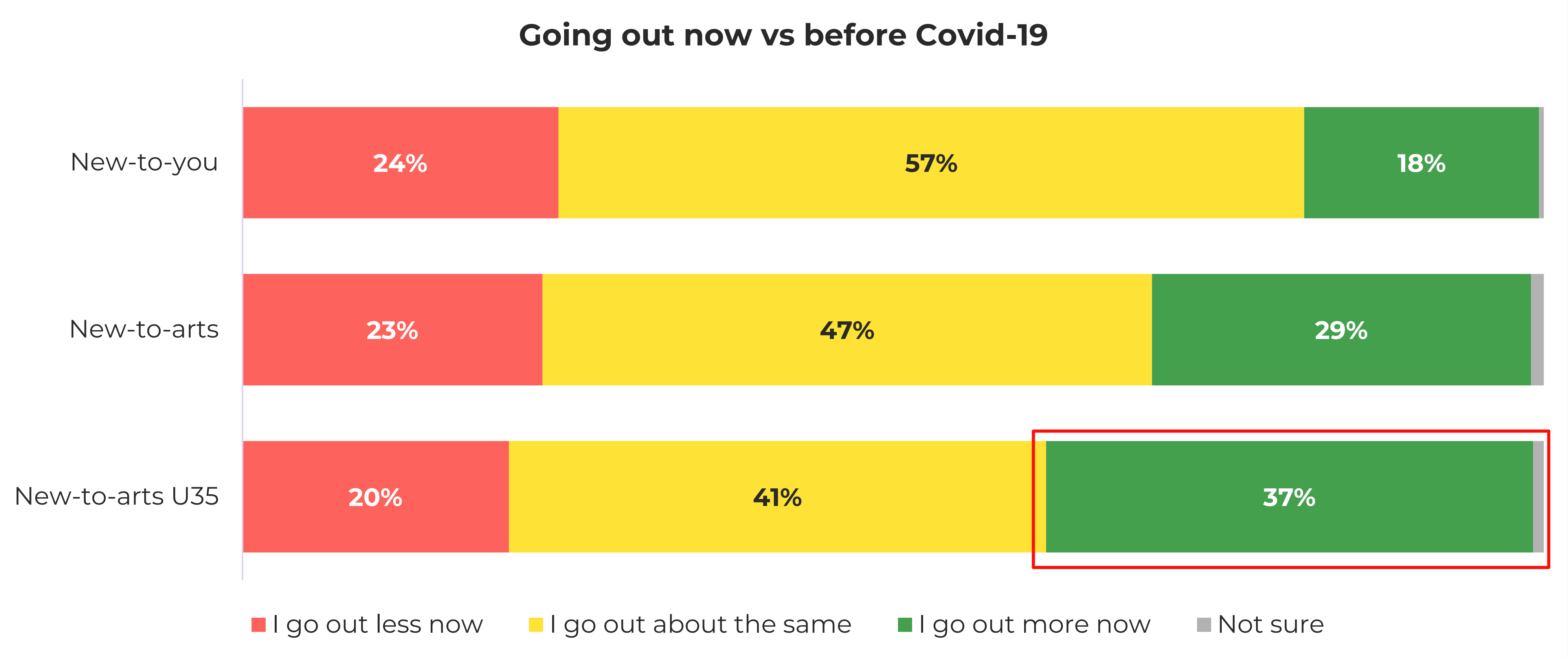
This increase in socialising was even more true of the under 35s who were first-time arts attenders post-lockdown with over a third reporting they now go out more often.



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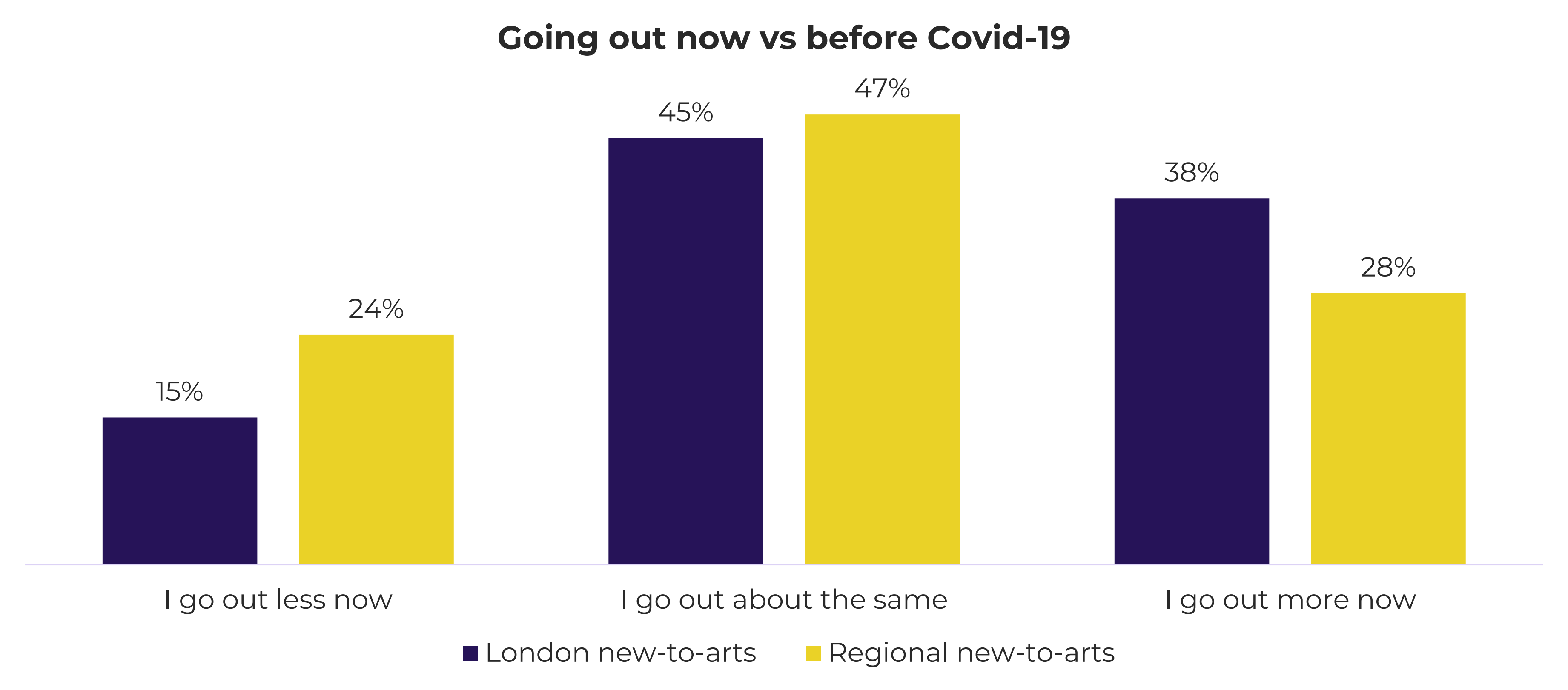
However, there are significant differences between regions in terms of general socialising habits in new-to-the-arts audiences. Londoners are much more likely to have increased their social activity, whereas a quarter of regional audiences go out less now.



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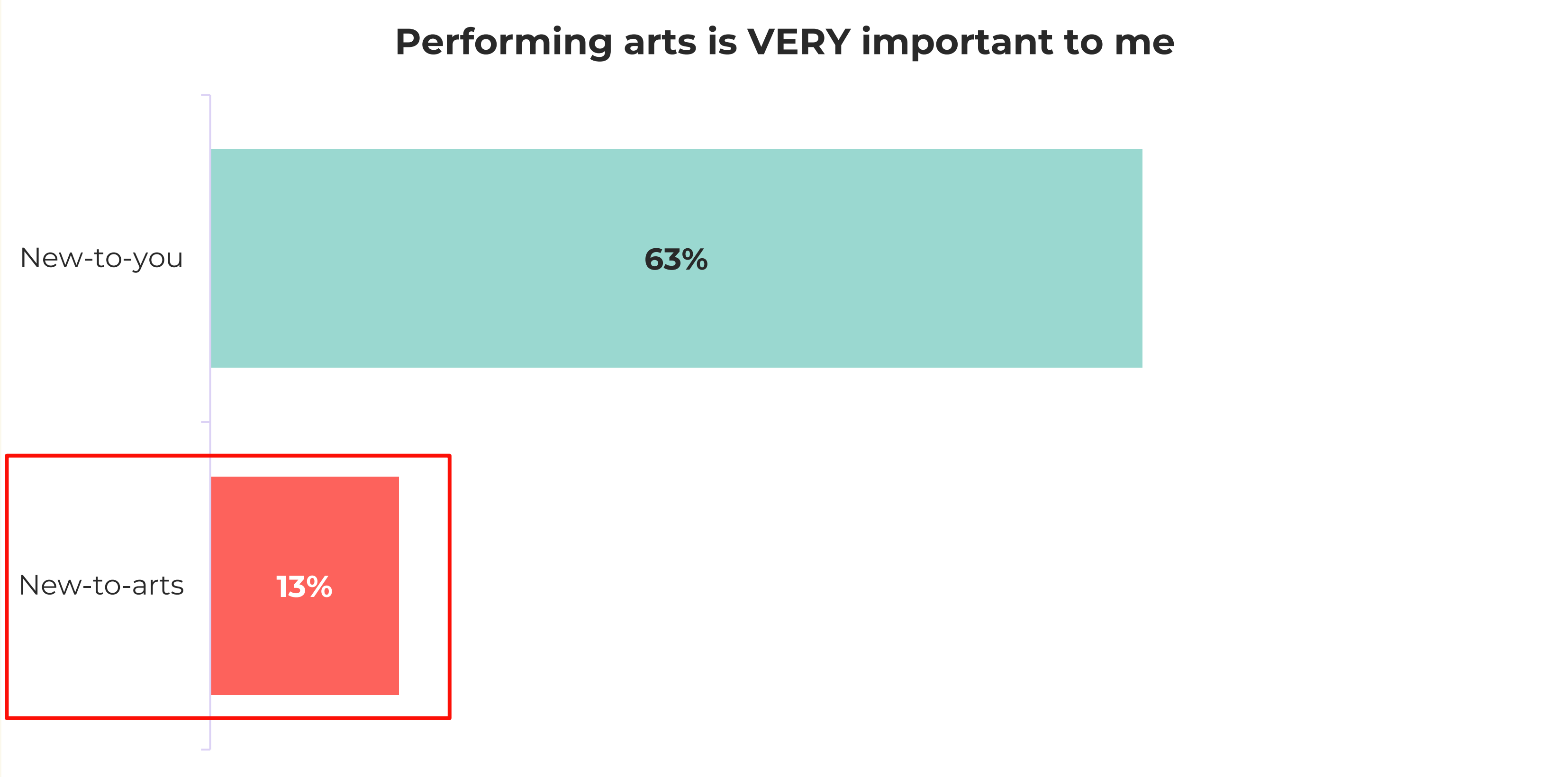
Despite going out more, the performing arts are much less important to new audiences with only 13% stating they are very important, versus almost two-thirds of those audiences who were culturally engaged before the pandemic.



London audiences were much more likely to say that the performing arts were important to them: **68%** of Londoners said they were important or very important, compared to **59%** of those living outside London.

24% of new classical music/opera audiences said the arts were **very** important, compared to only **17%** of new drama audiences.

Out of all the things you do in your free time, how important to you is attending performing arts events? n=10,050

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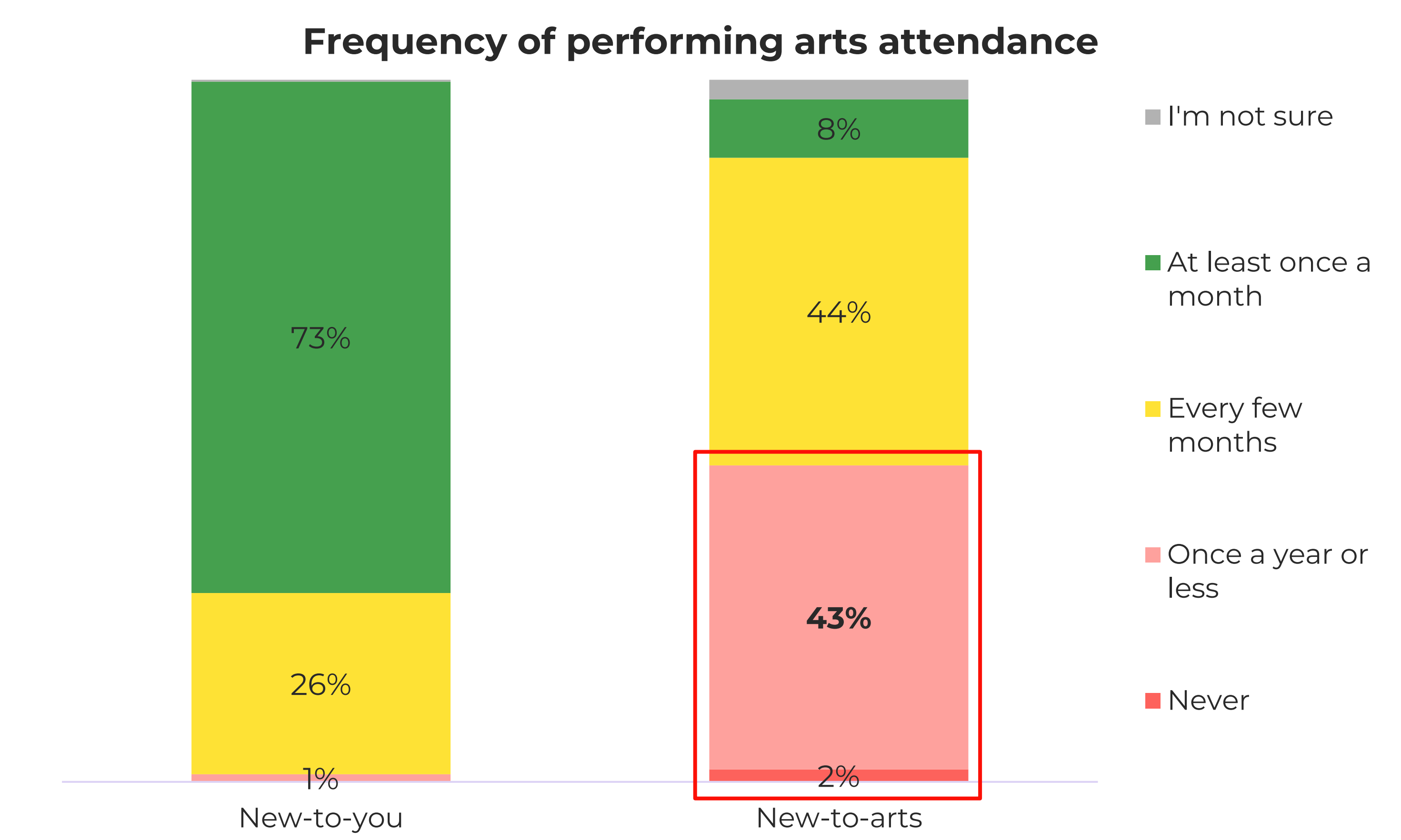
Almost half of new-to-the-arts audiences say they attend the performing arts once a year or less. Although they are going out more in general, this is not to (what they define as) the 'performing arts'.



London audiences are more likely to be attending the performing arts regularly post-lockdown: **17%** attend at least once a month compared to only **7%** outside London.

Classical/opera audiences are again the most engaged arts attenders by artform, with **21%** attending at least once a month, compared to **15**% for drama and **10%** for dance.

Note: this does not mean they have ONLY attended these artforms, but they have been grouped by their most frequently attended artform.

Approximately how frequently would you say you NOW attend performing arts events? (Select one) n=8,884

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Those who are new to the arts are more affected by the cost of living than those who were already arts-engaged – particularly those new under 35 audiences. There is also regional variation, with Londoners particularly feeling the pinch.

New-to-you	New-to-the-arts	New-to-the-arts under 35s
21%	31%	39%

New-to-arts Londoners	New-to-arts outside London
37%	29%

say their free time activity is impacted "a lot" by the cost of living crisis

To what extent is the cost of living crisis having an impact on what you are able to do in your spare time? n=10,050

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Section 5

What do first-time audiences get from their experience?

Once they have crossed that threshold, what do those who are new to the arts get out of their attendance? Are we giving them a great experience which will leave them wanting to return?

Key findings:

- **70%** of new-to-arts audiences say their experience was better than they expected.
- The vast majority felt very welcome and very much like it was somewhere for them.
- Most new-to-arts audiences gave the highest scores around recommending the organisation, although London new-to-arts audiences' scores were significantly lower.
- New audiences rate value-for-money very highly, even younger new audiences.
- **88%** of new-to-arts audiences said attending the performing arts increased their wellbeing.

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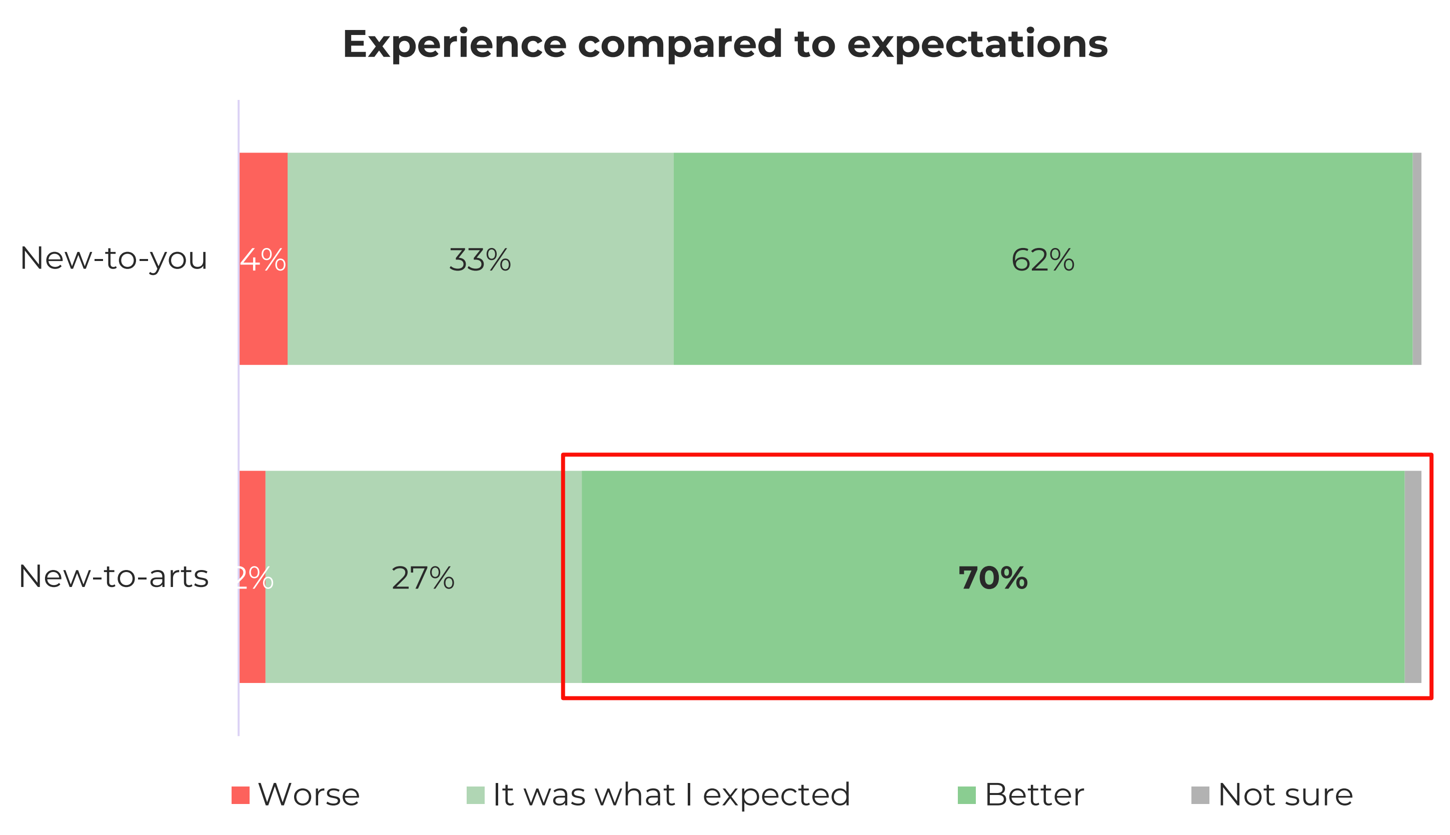
New audiences report that their experience exceeded expectations far more often than those arts-engaged but new-to-you.



Regional audiences were more likely to report a better-than-expected experience: **71%** vs **59%** in London.

Was your first experience better or worse than you expected? n=9,902

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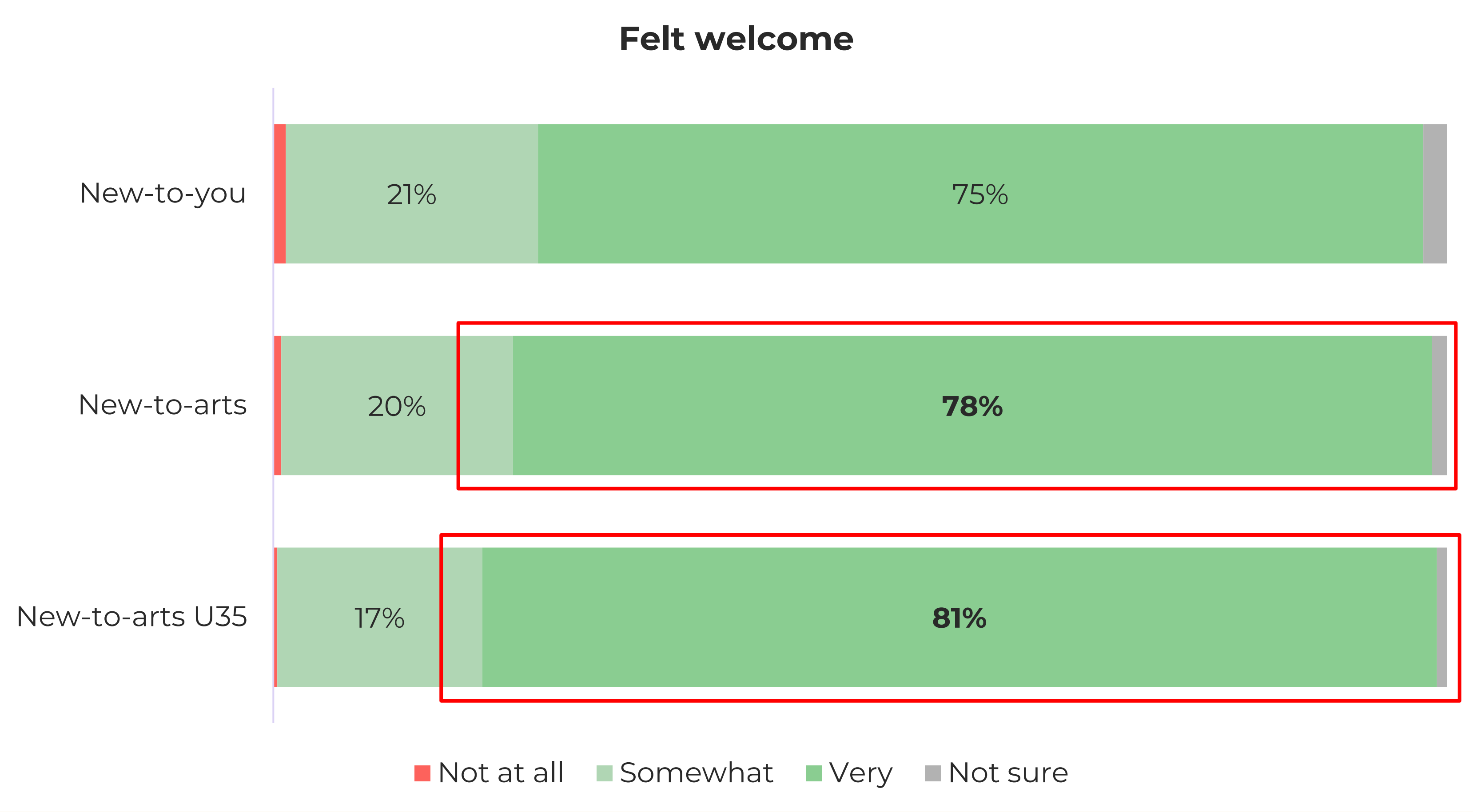
Audiences overall felt very welcome, with new-to-arts and under 35 new-to-arts feeling even more welcome than the previously arts-engaged audiences.



There was little difference between London and outside London in terms of feeling welcome, but new-to-arts drama audiences rated their welcome highest of all the artforms: **83%** felt very welcome, compared to **78%** for classical music/opera and **75%** for dance.

To what extent did you feel welcome? n=9,646

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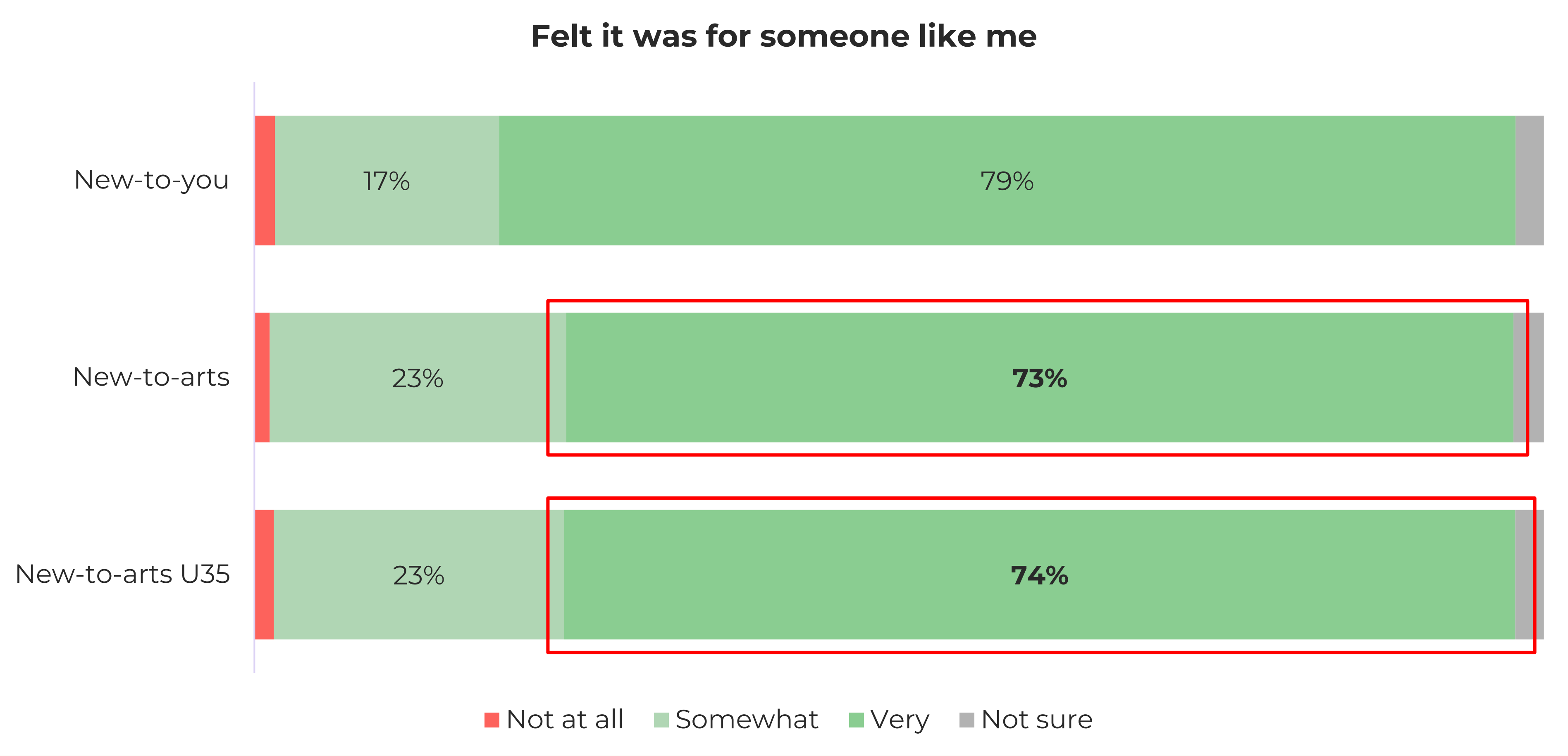
Although we know that some audiences can struggle to feel at home, the vast majority felt that the experience was for someone like them.



To what extent did you feel like the experience was for someone like you? n=9,902

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New-to-arts audiences rated organisations slightly higher than new-to-you audiences.

The under 35 new-to-arts audiences gave slightly lower ratings, as did London audiences.

*For context, our current Indigo arts sector NPS benchmark is 72 across **all** audiences.*

New-to-you

NPS +60

New-to-arts

NPS +64

U35 new-to-arts

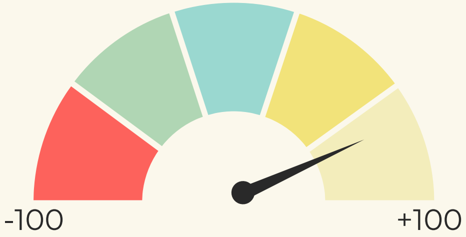
NPS +61

London new-to-arts

NPS +54

Outside London new-to-arts

NPS +66



How likely is it that you would recommend this organisation to a friend or colleague? (Net Promoter Score) n=9,646

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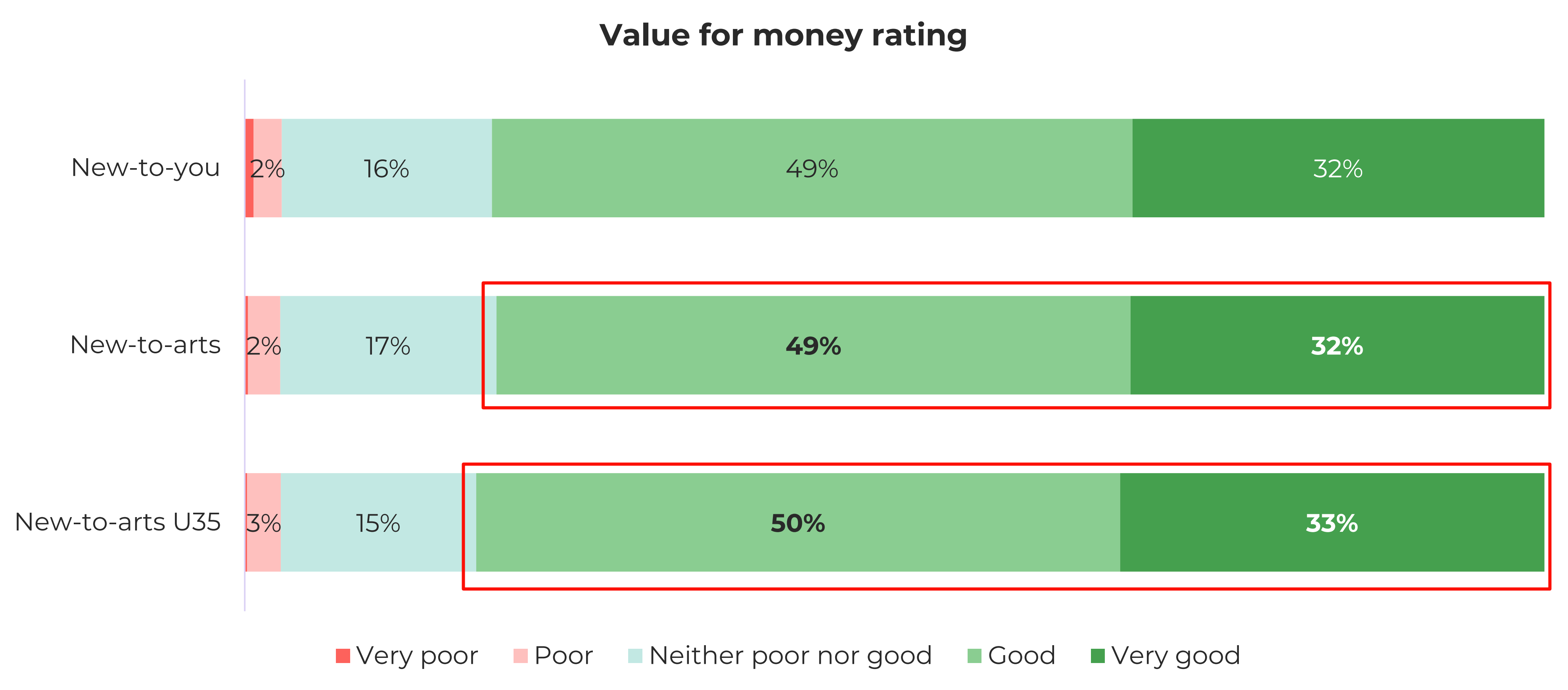
Despite feeling pressures from the cost of living and spending significant amounts per ticket, new audiences rated value for money just as highly as more arts-engaged audiences.



How would you rate the value for money of the tickets you bought? n=8,581

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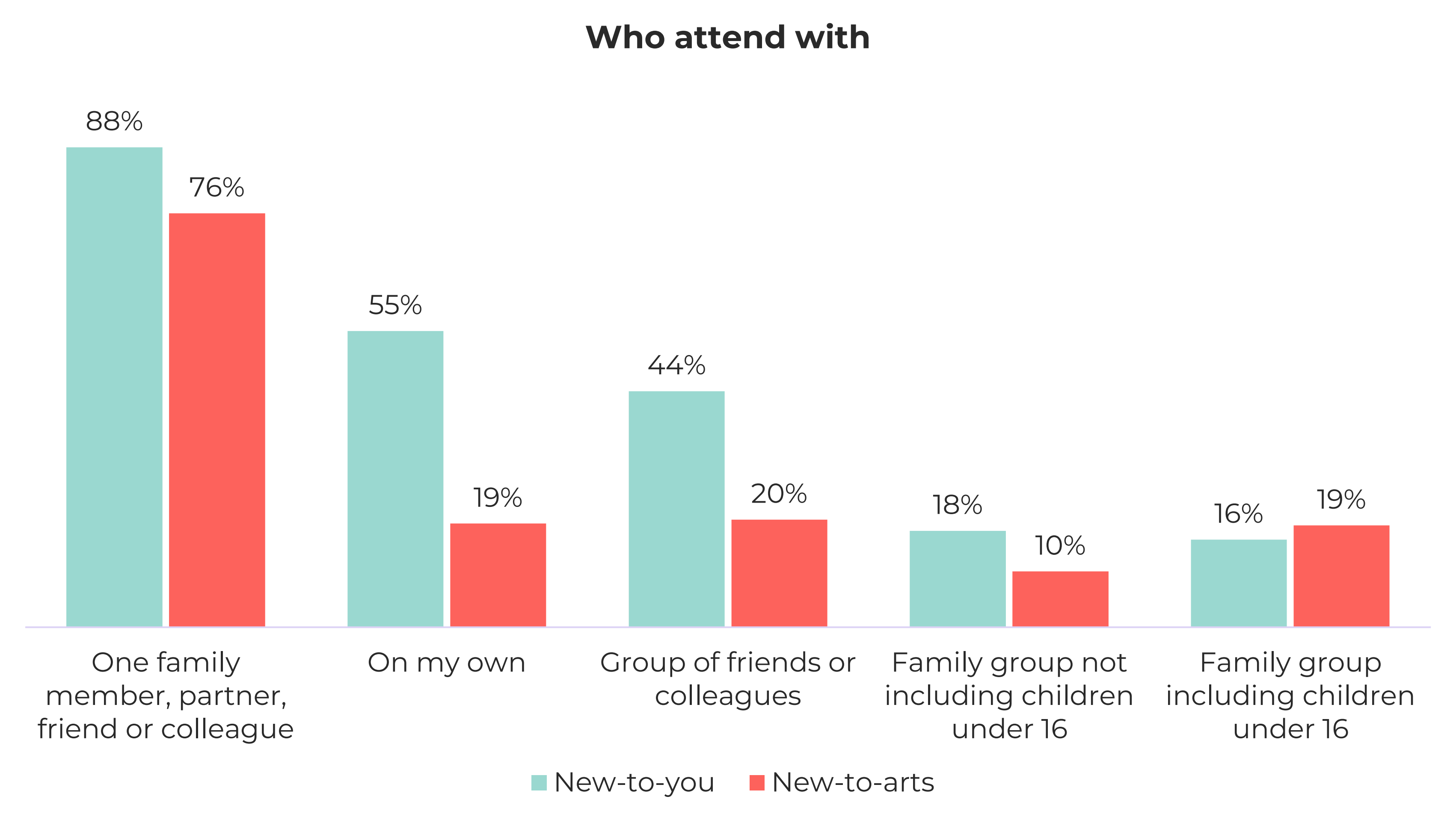
New-to-arts audiences were much less likely to have attended on their own or in large groups over the past year. Most of their experiences are with one other attender.



London new-to-arts audiences were more confident to attend alone than regional audiences (**34%** vs **16%** outside London), whereas regional audiences were more likely to have attended as a family group than London audiences, with children (**20%** vs **15%**) or without children (**11%** vs **7%**).

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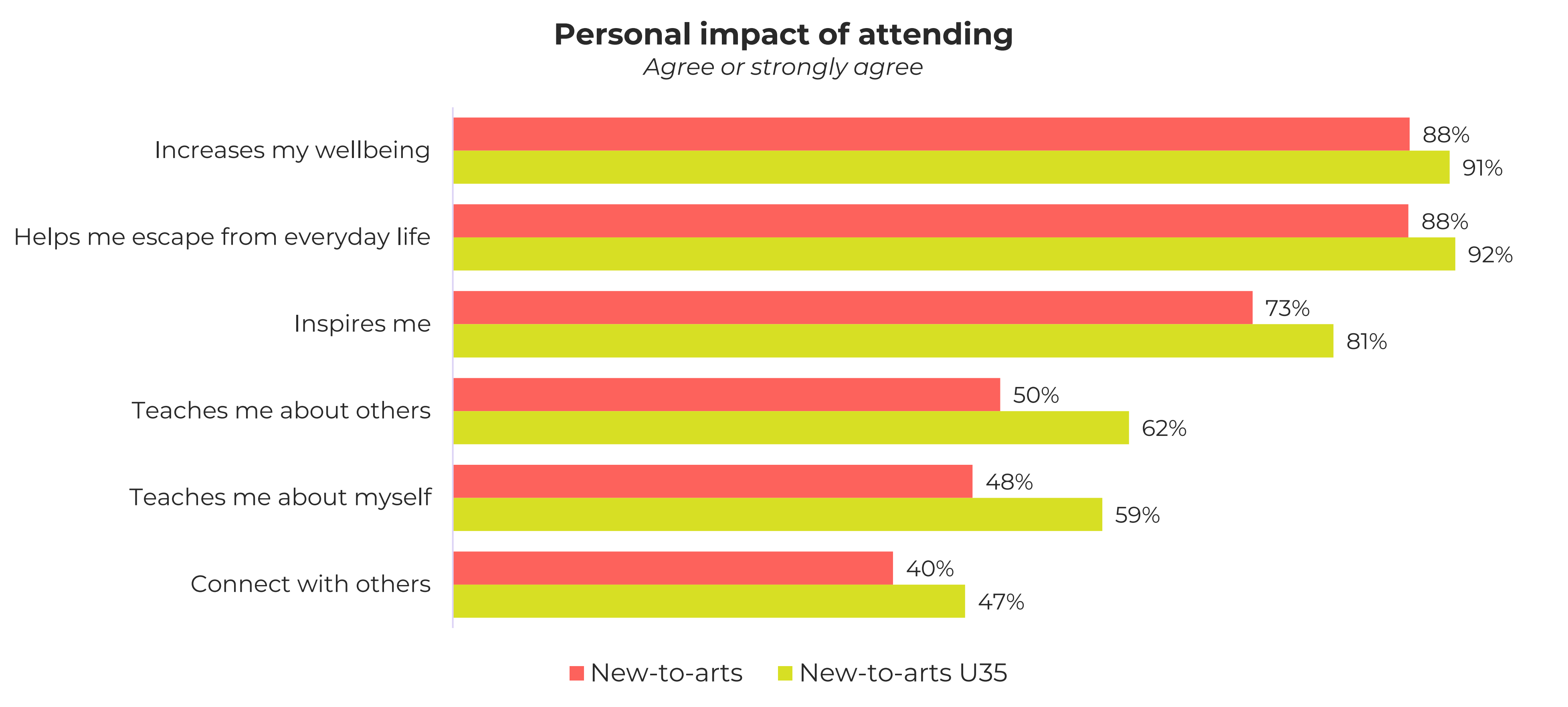
Almost all audiences report an increased sense of wellbeing and a chance for escapism. Despite the collective experience and the preference to attend with others, the impact (when measured in this way) appears to be more individual than social.



How far do you agree with the following statements about your attendance of performing arts events since the COVID-19 pandemic? n=9,210

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Section 6

What are the motivations and barriers for first-time attenders?

What makes someone attend a live performance for the first time? And what can stop them making that trip?

Key findings:

- We found three key motivators for first-time audiences: People, Familiarity and Occasion.
- We also found three main types of barrier: Not on my radar, Too hard and Poor value.

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From the audience surveys and focus groups, we uncovered three key motivators for first-time attendance. We have summarised these as People, Familiarity and Occasion.

People

Familiarity

Occasion

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New audiences reported that their first attendance was often driven by someone else: either that other person was the instigator (and sometimes the booker), or they wanted to book for the sake of someone important in their life, like a partner or child.

Zahara

John

Helen

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People

Focus Groups

Zahara

"*My sister was encouraging me. Come on, let's schedule a musical, say, just to you know, have a nice day out.*"

Zahara is in her mid 30s. She's a teaching assistant living at home with her mum and her siblings. Her sister had encouraged her to go and see the musical *Mary Poppins* with her, and she really enjoyed it.

John

"*Me and my wife try and have regular date nights where we take it in turns. And it was my turn in December. So I know that one worked last time around. So I went for it again.*"

John is in his mid-30s and is a sales director for a manufacturing firm. He lives with his wife and two boys in Birmingham. He is a big football fan. His wife persuaded him to go and see *The Nutcracker* at the Birmingham Hippodrome at Christmas in 2022 and she booked the tickets. This was the first time he had been to see anything like this and he loved it – so much so that he booked to see it again in 2023 as a present for his wife because he wanted to re-create the experience for their date night.

Helen

"*We've just been to see **The Snowman** […], because he loves brass bands and music, and so for me his interest in live music and brass bands and orchestras is what has driven us.*"

Helen lives in South Shields with her husband and two young boys, both under five years old. She recently started going to the theatre because her elder son started showing an interest in music, in particular, brass bands. She wanted to foster his interest and so took him to see the CBeebies Prom and *The Snowman*, both at the Glasshouse in Gateshead. It makes her feel like she is being a good mum and she is now on the lookout for other things he might like to see.

Direct quotes from new audience members; names and faces have been changed

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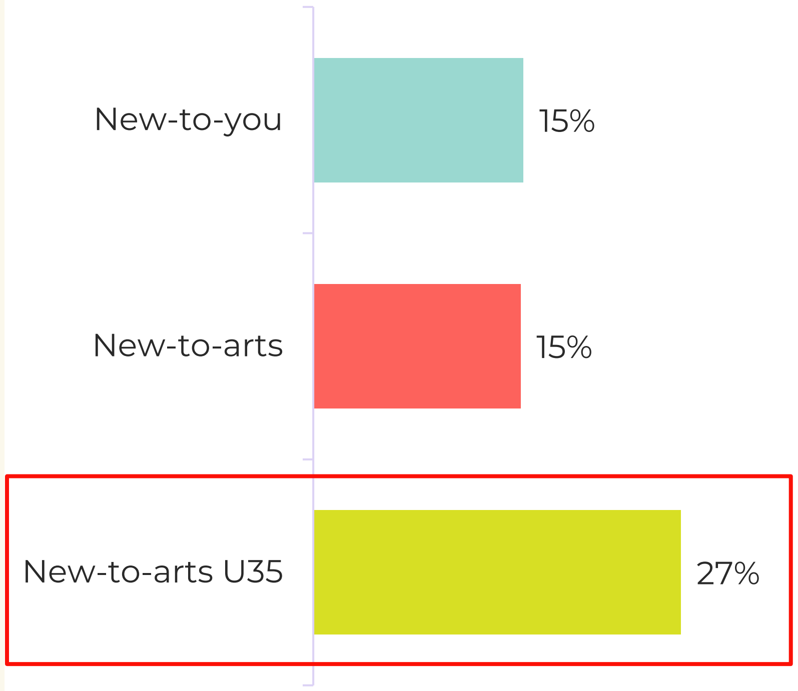
Younger new audiences in particular see other people as very influential on their attendance, whether for the first time or on subsequent visits. Over a quarter of under 35 new-to-arts audiences said that they would consider returning to the same organisation in the next 12 months because someone else took them along.

Reason to return: "If someone takes me along"



Given – as we saw with Helen on the previous page – the potential for a **child** to be a driving force in someone attending the performing arts, it's interesting to note that new-to-arts audiences are more than twice as likely to have a child or children under 16 living with them (**23%** vs **10%** of the previously arts-engaged, new-to-you audiences). Reflecting on the Spektrix sales data 2023 vs 2019, it is worth noting that many of the months where 2023 sales outperformed 2019 were school holidays.

London audiences were more likely to report being motivated by being taken along by someone else than outside London audiences: **20%** versus **15%**.

For which of the following reasons might you consider attending this organisation again in the next 12 months? (Select all that apply) n=9,210

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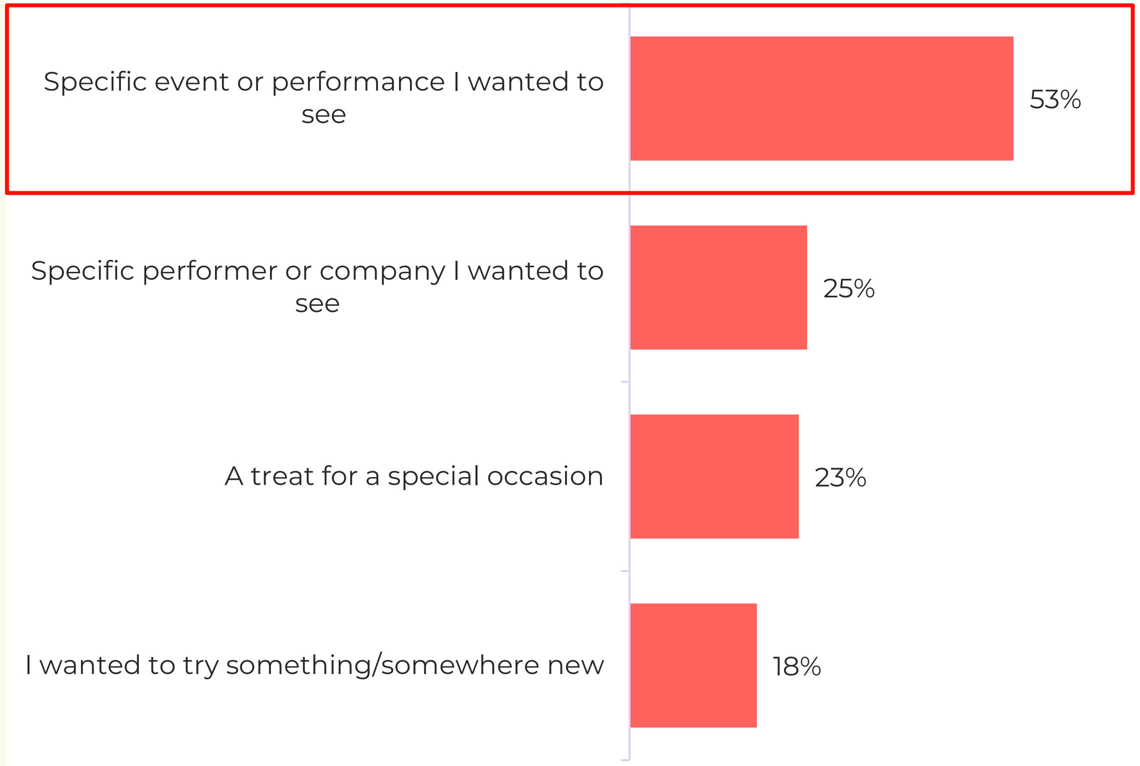
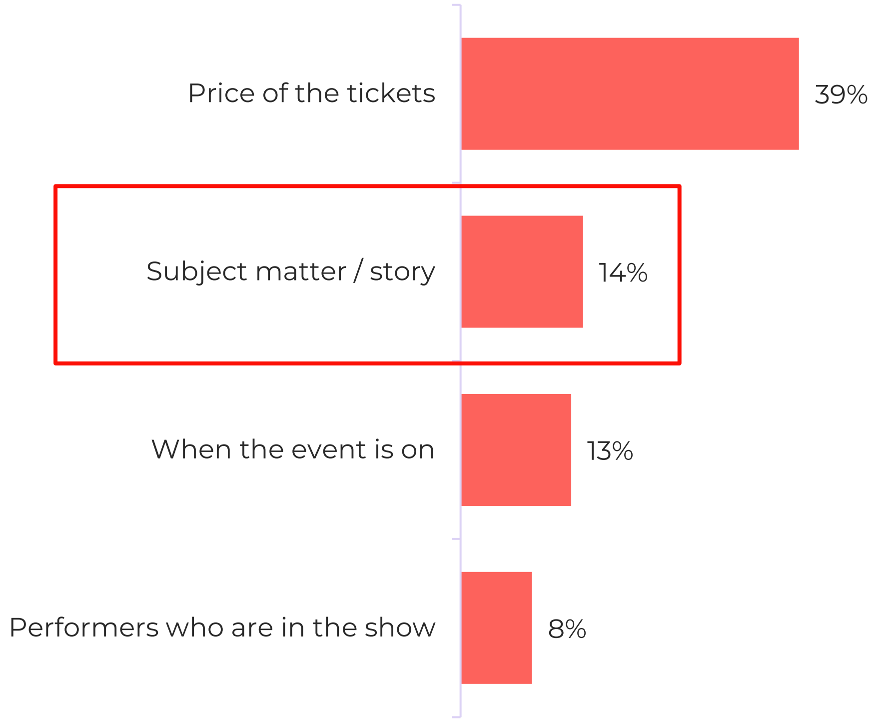
We know people are driven by seeing specific performances or stories, but familiarity takes this a step further. Rather than relying on relevance of story or theme, audiences seek a reassuring connection to it.

Reasons for first attending: new-to-arts



Biggest influence on decision to attend: new-to-arts



Which do you think is the most likely reason you will attend in the next 12 months? n=9,210

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Familiarity with the story in other media can provide the necessary connection to attend, for example a book or a film. Our previous case studies reiterate this, too, with trips to *Mary Poppins*, *The Snowman* and the CBeebies Prom. In fact, familiarity can even mean coming back to the same thing again for their second visit, as with John's date night at *The Nutcracker.*

"*What's sort of drawn me recently to go see more performing arts is the more modern subjects so like* The Great Gatsby. *I studied it at university, and it's one of my favourite books.*"

(Female, White, 18-34)

"*It's a good story. It's a bit weird, but you know it's good, and I'd already seen the film.*"

(Female, White, 35-54; talking about attending ballet for the first time to see *Edward Scissorhands* at Sadler's Wells)

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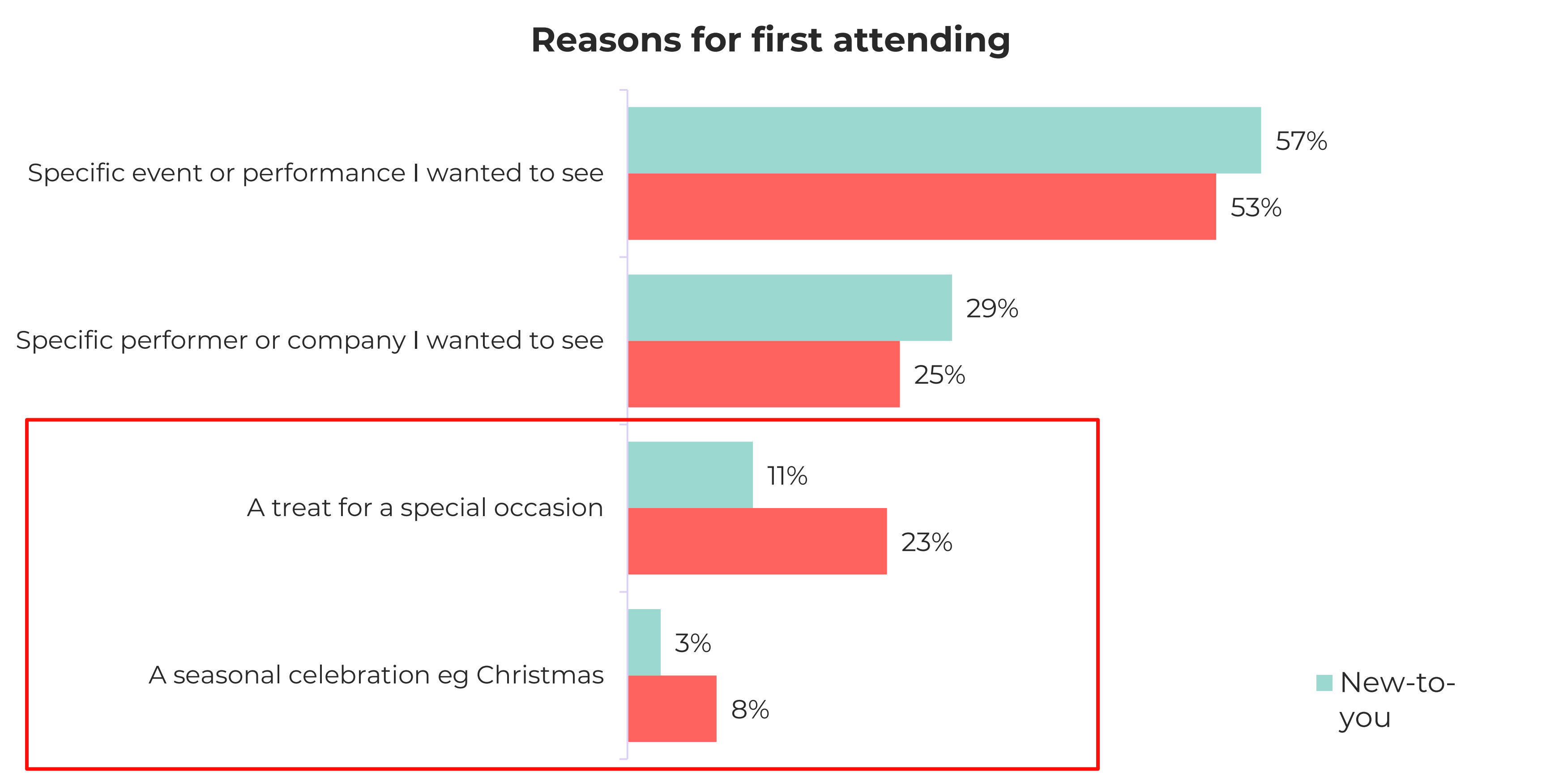
Special occasions are an important driver for new audiences to attend for the first time: almost a third remember attending for the first time because of a special or seasonal occasion.



"I'd never wanted to go and see it before. It was more like we should see a ballet. It's Christmas Eve."

(Female, White, 35-54)

Do you remember WHY you decided to attend this organisation for the first time? (Select all that apply) n=9,902

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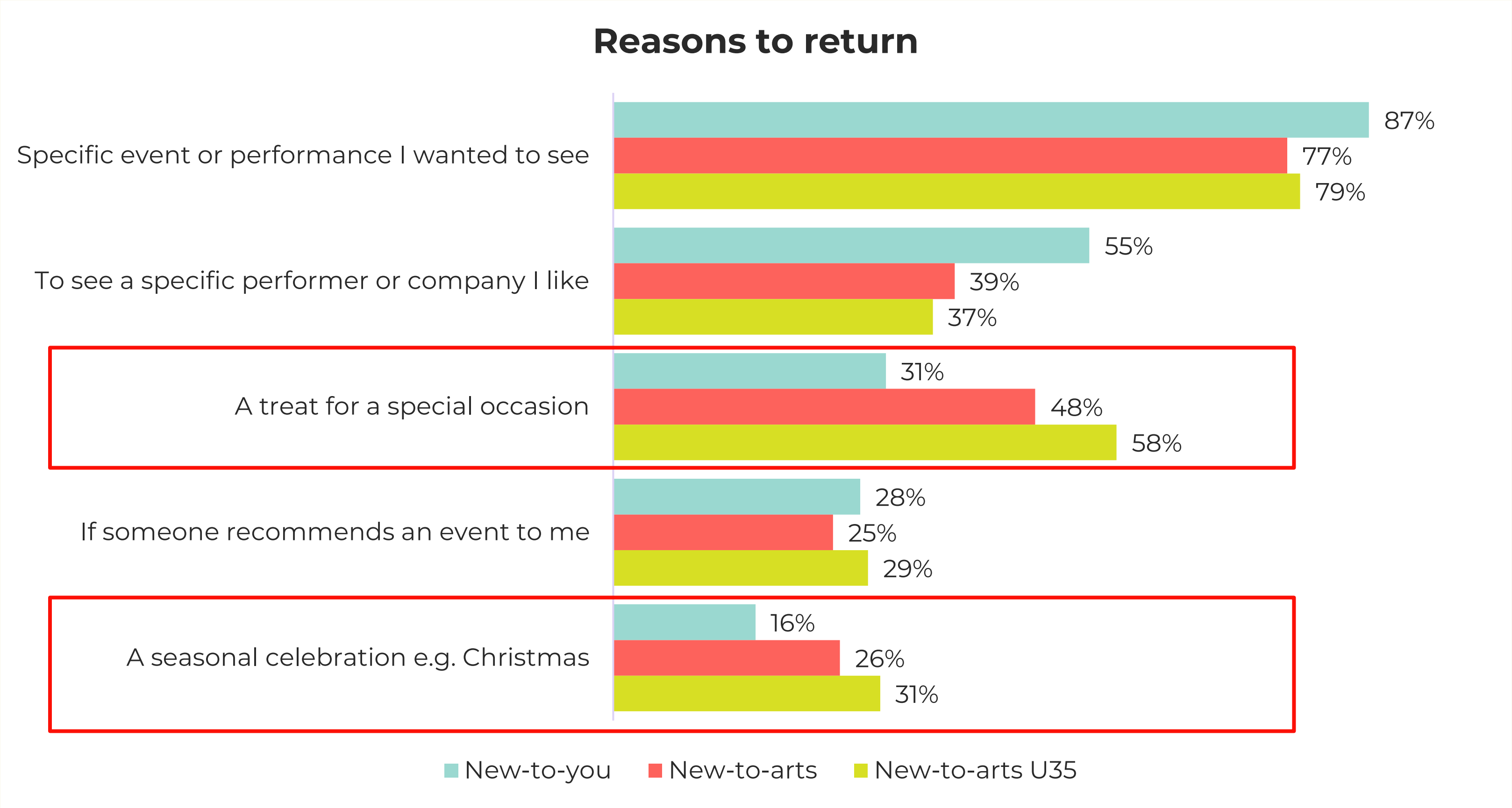
And new audiences are also more likely to come back for an occasion. In particular, 58% of under 35 new-to-arts audiences say it's the **most** likely reason they will return in the next year, compared to 31% of new-to-you audiences.



When forced to choose one reason only that they felt was **most** likely to drive their attendance in the next year, **a quarter** of under 35s stated a special or seasonal occasion – more than 3 times the proportion of arts engaged audiences where it was only **8%**.

Regional audiences were more likely to return in the next year for a special or seasonal occasion (**75%** vs **68%**) although results were closer for it being the **most** important driver (**21%** vs **18%**).

For which of the following reasons might you consider attending this organisation again in the next 12 months? (Select all that apply) n=9,210

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So what is getting in the way of new audiences attending the performing arts? We found three broad groups of barriers commonly preventing audiences from attending.

Not on my radar

Too hard

Poor value

For some people, the performing arts are not part of their sense of identity or cultural heritage. This is exacerbated by a narrow concept of the performing arts, centred around theatre, opera and ballet, and not necessarily encompassing festivals, live music or comedy.

"*It wasn't something that I ever really thought I would get into. I always thought it was just so far away from the person that I was, and the interest that I had.*"

(Male, White, 35-54)

"*It's a demographic I suppose I've never really associated myself with... white, middle class, affluent. But I enjoy it.*"

(Male, British Asian, 35-54)

"*The only theatre that we ever saw growing up in Suffolk, it was always old ladies with silk scarfs.*"

(Female, White, 35-54)

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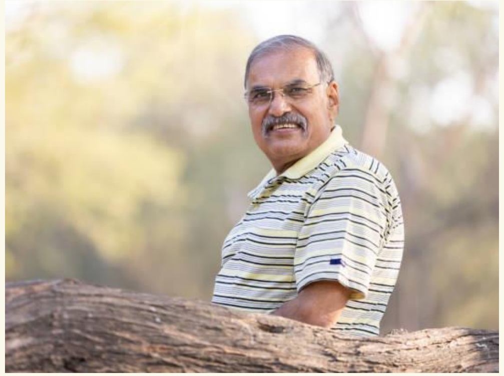
In addition, when they do manage to attend, some can feel lost, out of place or uncomfortable.

“*I've heard that some people were a bit scared in a way of going to the opera just because they didn't know how to dress.*”

(Female, White, 18-34)

“*It just feels like when you're there and you've never been to a theatre before. It just feels like everyone else there knows what they're doing and what's going on, and you don't.*”

(Female, British Asian, 18-34)



Jahid

“*I don't drink at all and neither does my wife. So I find the whole before the show and the intervals [...] difficult times. The culture is about, you know, let's have a drink at a bar beforehand. And that's not me so I I'm always a little bit uncomfortable before the show.*”

Jahid is in his 50s, works as an accountant and lives with his wife and three kids in Birmingham. He sees himself as quite unusual, being a Muslim man who enjoys going to the theatre. He thinks most people from the Muslim community will think that the performing arts is not for them. Culturally he thinks they will see it as a posh thing to do. His first attendance was due to a key person, his uncle, who took him to the theatre when he was a teenager. Despite having attended as a young person, he still finds it challenging to visit.

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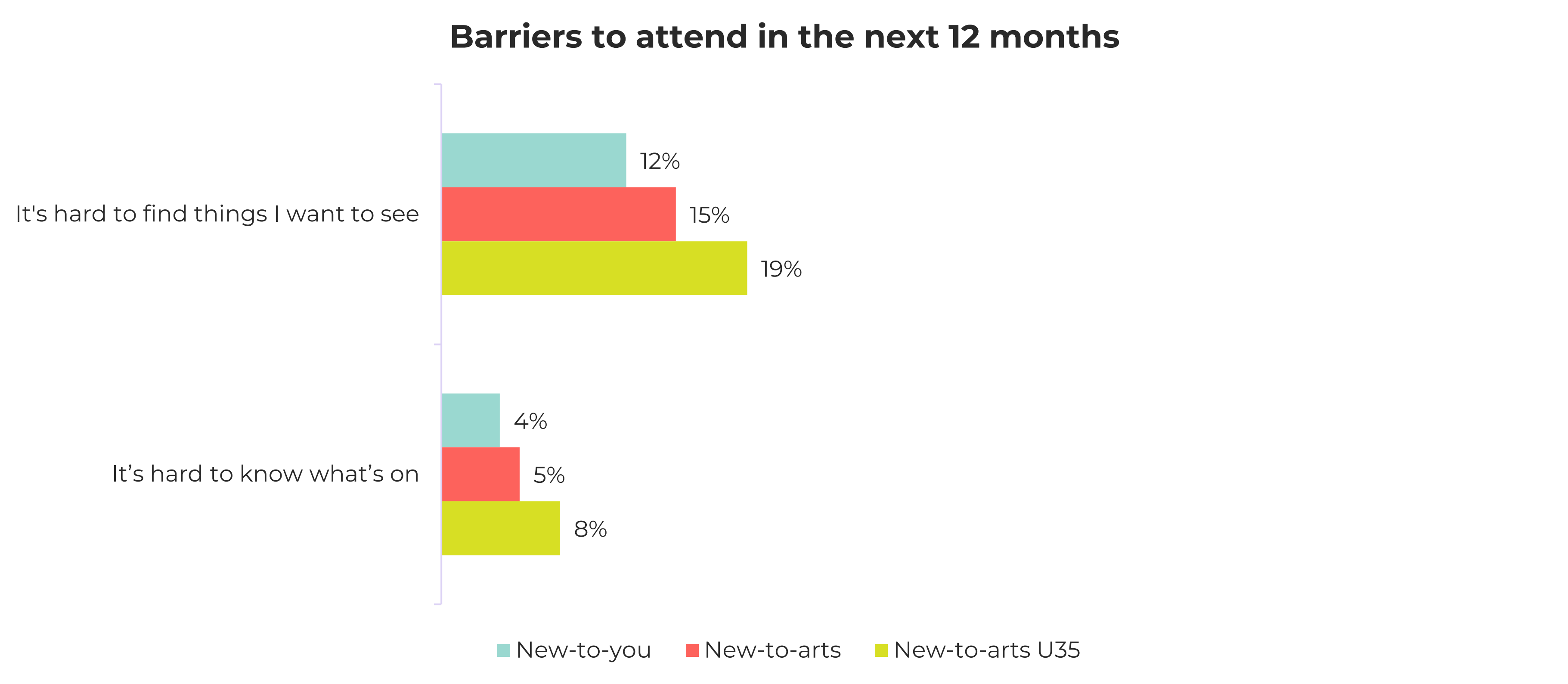
Even if they were interested in attending, some new audiences told us that they feel out of the loop and reported that it was hard to find things they were interested in as well as generally finding it hard to know what was on. This was particularly true of younger audiences.



Might any of the following stop you from attending more performing arts events in the next 12 months? n=9,210

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Practical barriers were very likely to get in the way of new audiences' intentions to come to the performing arts. If we remove cost from the equation, 44% of the biggest barriers were practical considerations such as transport, times of the performance, how easy it is to get to and availability of food and drink.

New-to-you	New-to-the-arts
33%	44%

of reasons not to attend were practical barriers*

When considering attending a performing arts event, which of the following has the biggest impact on your decision-making? n=9,210

*After "Price/cost of tickets" removed

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Too hard

Audience surveys

Focus Groups

Audiences listed a whole host of practical challenges that got in the way of their attendance, and they could come at any stage of the process.

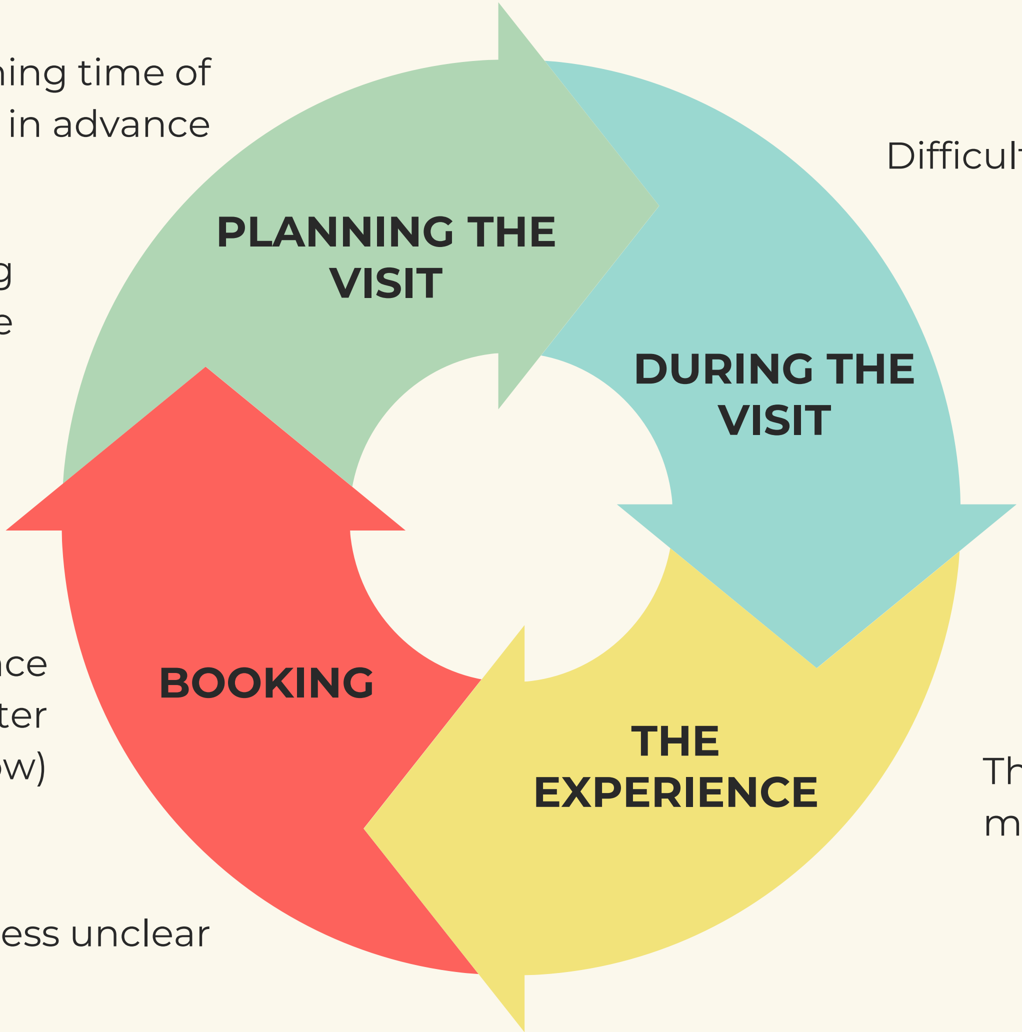
Not knowing the running time of the show in advance

Need information on bag storage

Too far to travel

Time of the performance (especially getting home late after a show)

Booking process unclear



Difficulties parking

Not enough toilets to reduce interval queues

Feeling overcrowded on entering and leaving the auditorium

The experience requires effort, it’s more stressful and tiring vs. cinema

© Indigo-Ltd 2024

Too hard

Finding the whole process too difficult can be involve multiple practical and psychological blocks.

Kate lives with her teenage daughter and husband in Wales. She had wanted to go and see *Les Misérables* for ages but would never have booked to go herself; she's anxious about booking things and worries about going to things alone, which is why she's not ventured to the theatre before. A family member surprised her with tickets. She had a brilliant time and would now feel more confident about booking and going.

Kate

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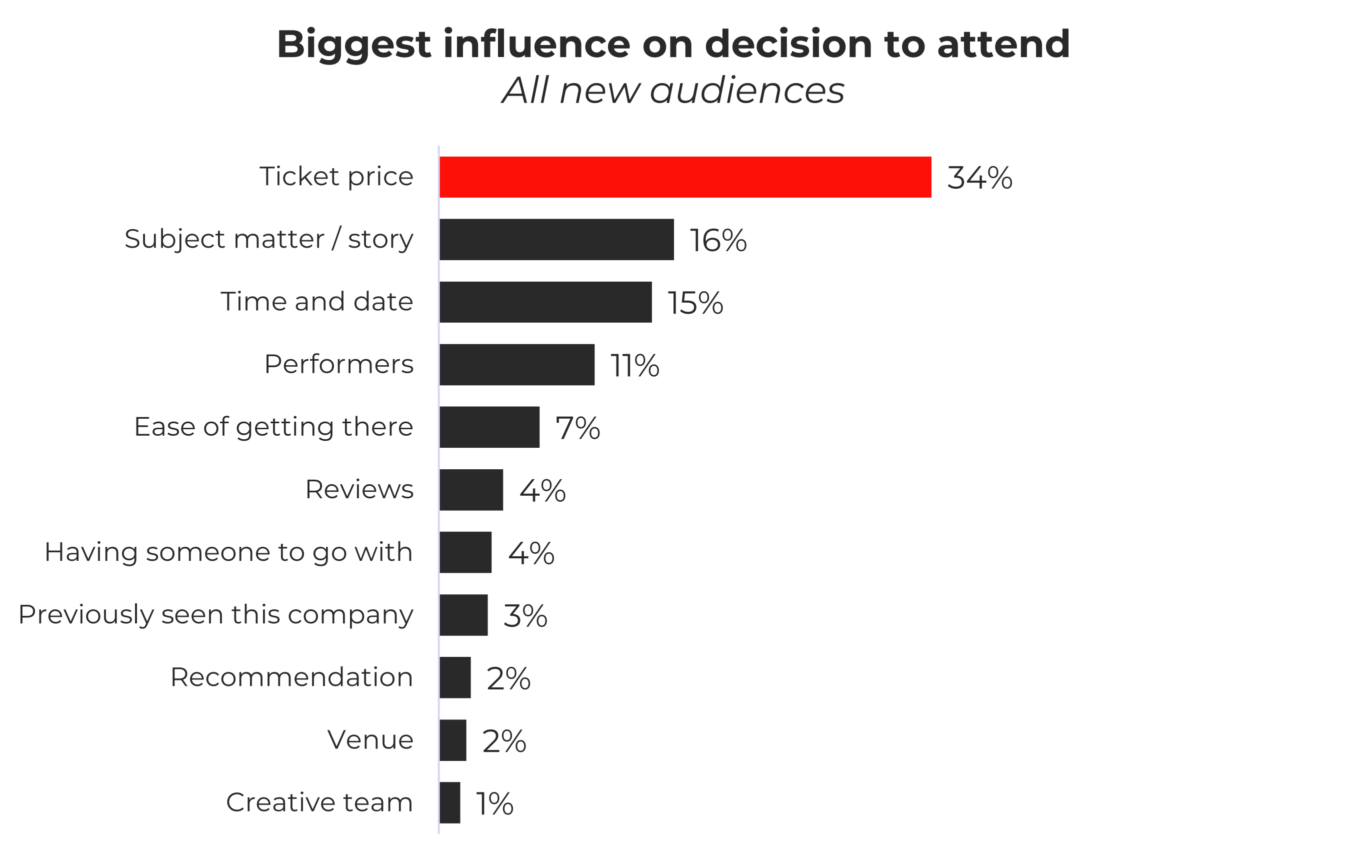
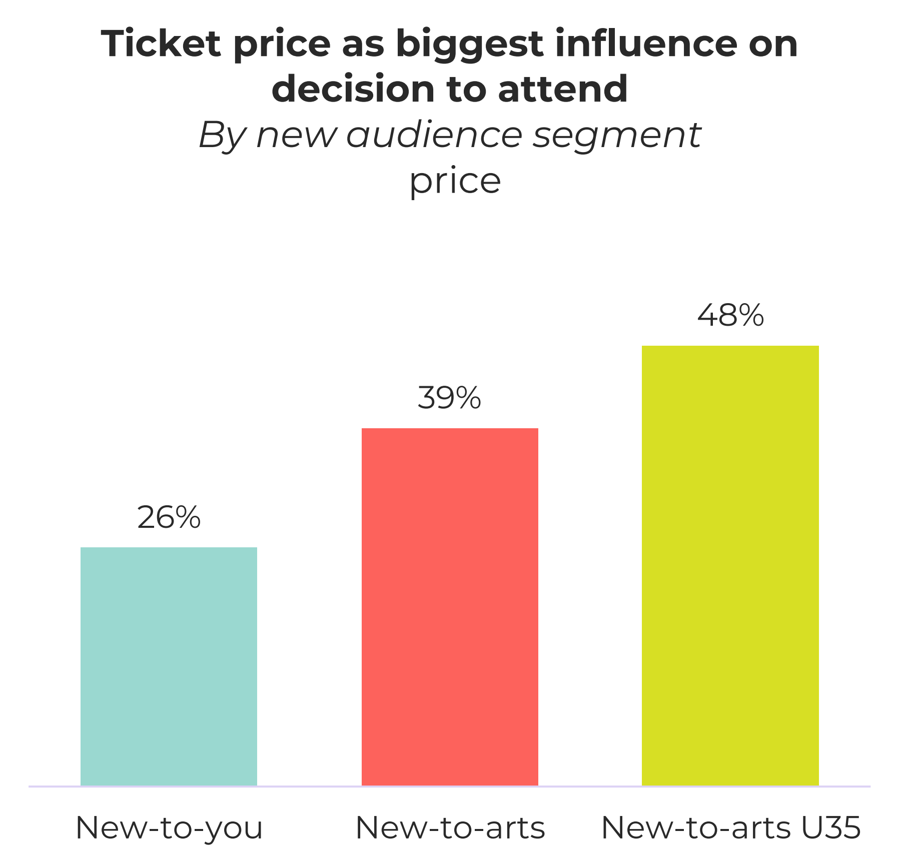
As mentioned in an earlier section, new-to-arts and under 35 new-to-arts are the most impacted by the cost of living, so it isn't surprising to see that price is a particularly significant influence on their decision to attend.





When considering attending a performing arts event, which of the following has the biggest impact on your decision-making? n=9,210

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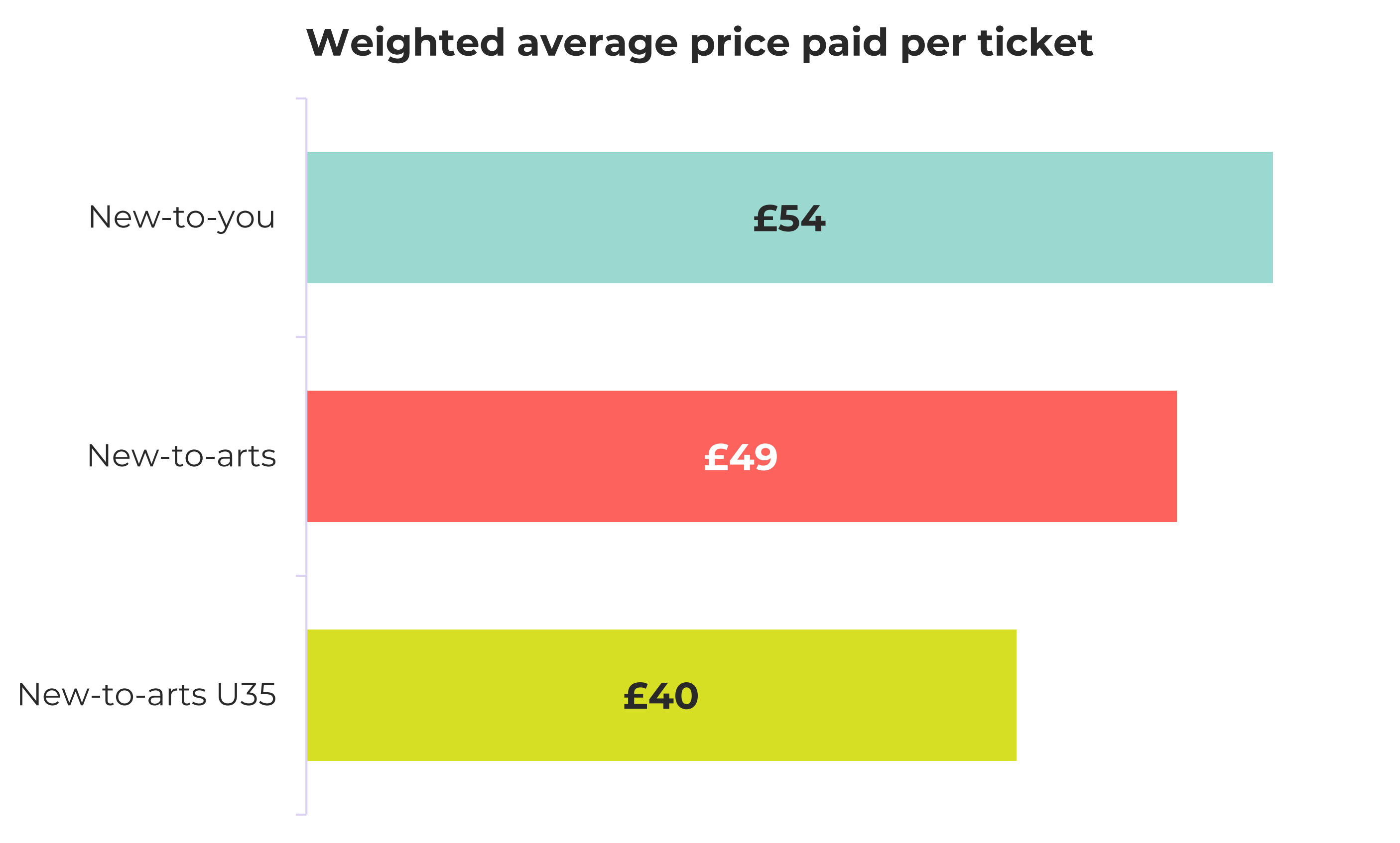
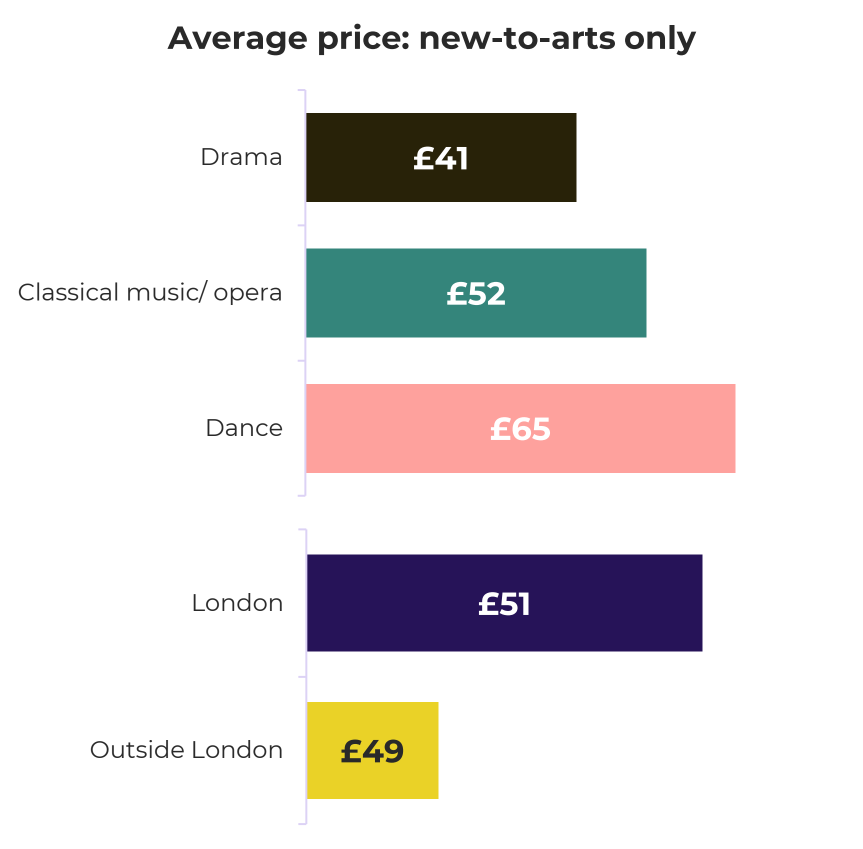
However, they are not only buying low-price tickets. The average spend per ticket for new-to-you audiences was £54, compared to £49 for new-to-arts and £40 for under 35 new-to-arts.





Approximately how much did you spend PER TICKET when you visited? (Weighted average) n=9,646

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Rather than simply price, it is perceived value that influences new audiences' attendance: is this experience something of meaningful value to them that is worth their money?

"*It's not about how expensive it is to go, it costs a couple of 100 quid, but it's not that, because those same people will go to the football match and spend 300 quid. So it's not a money thing. It's breaking into a new world, is the hard bit.*"

(Male, British Asian, 35-54)

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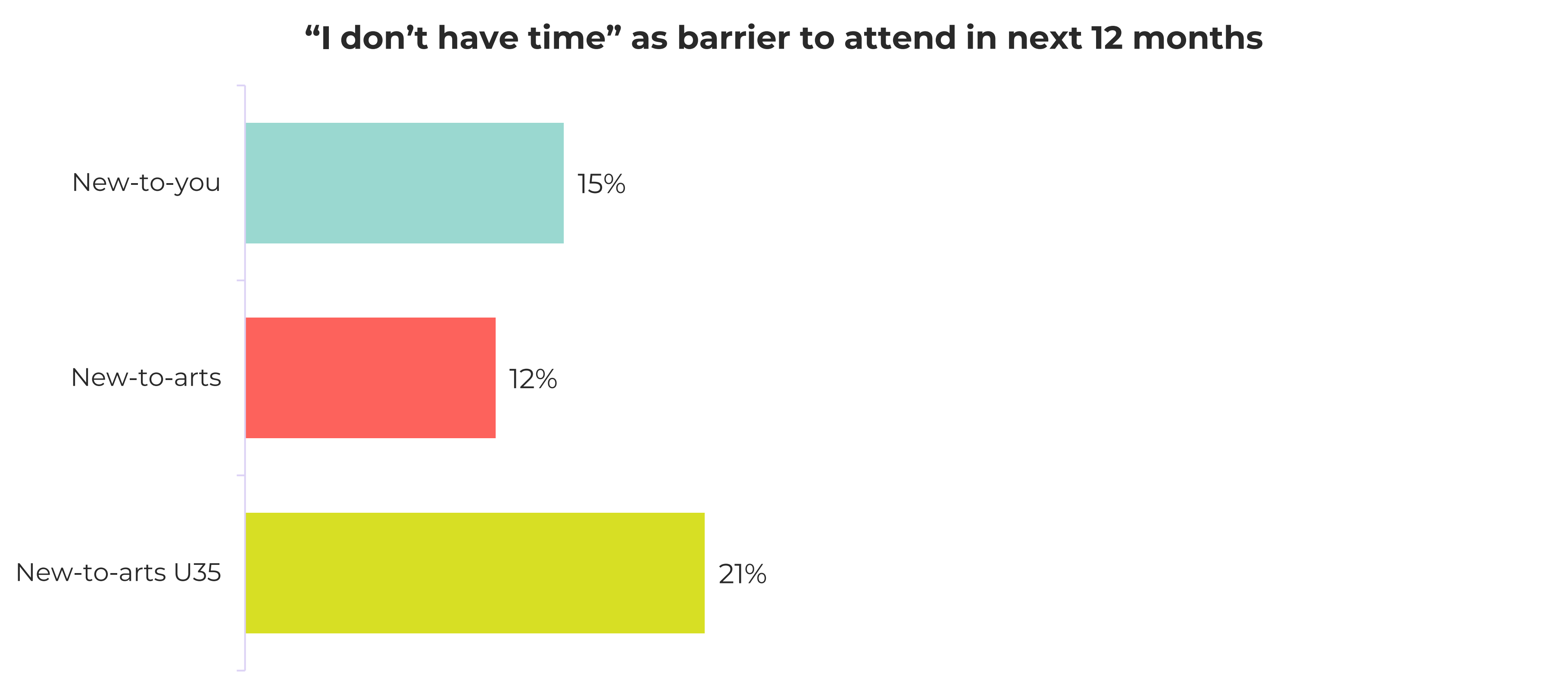
In addition, the “value-for-time” was a barrier. This involved the total experience time: the time needed to plan, book tickets, save up and travel there and back, as well as the performance itself. Young people felt themselves particularly time-poor.



Might any of the following stop you from attending more performing arts events in the next 12 months? n=9,210

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Section 7

What will get first-time audiences to attend and then return?

How can we attract more first-time audiences and then turn them into the loyal audiences of the future?

Key findings:

- Driving first-time and repeat attendance involves us both increasing the motivators and reducing the barriers.
- Familiarity with the venue helps to drive a strong intention to return.
- New audience may not see themselves as “performing arts attenders”.
- An inclusive approach to performances increases access for all audiences: over a third of under 35 new-to-arts audiences would welcome captions above the stage.

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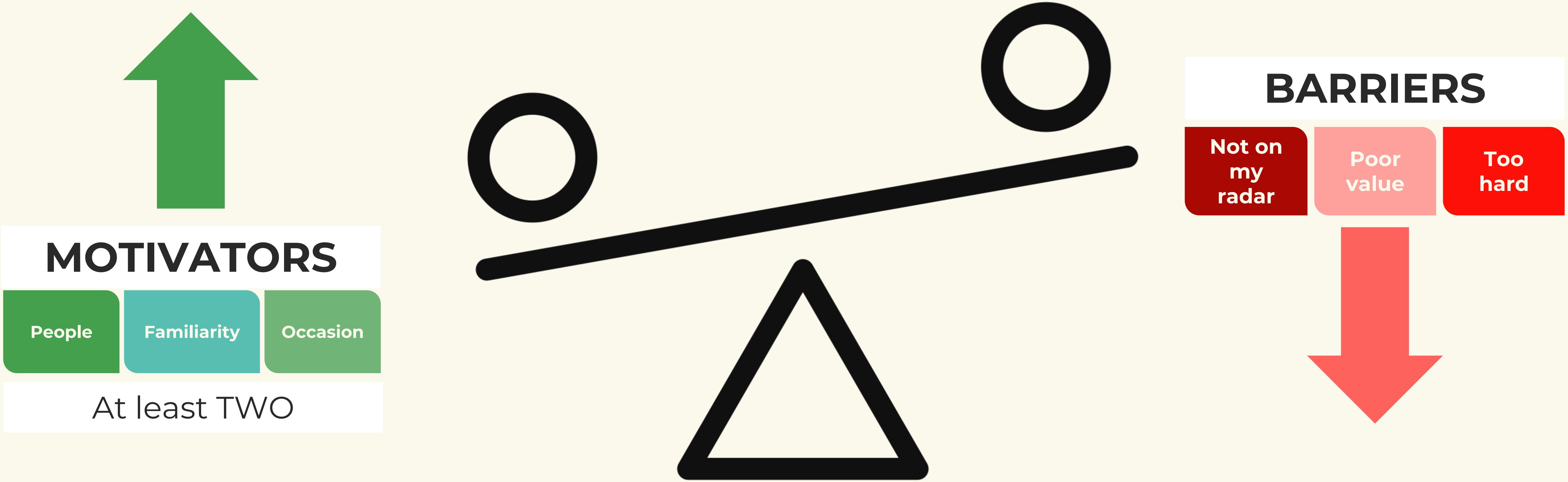
Developing new audiences requires us to help them tip the scales in favour of attending, making it as easy as possible. This takes more than one action: we must **both** increase the motivators and reduce the barriers. In fact, most of our respondents referenced at least two motivators in place for their first visit.



The good news is that the great experience they are having means new audiences have a strong intention to return to you in the next year.

How likely is it that you will attend the organisation who sent you this survey again within the next 12 months?

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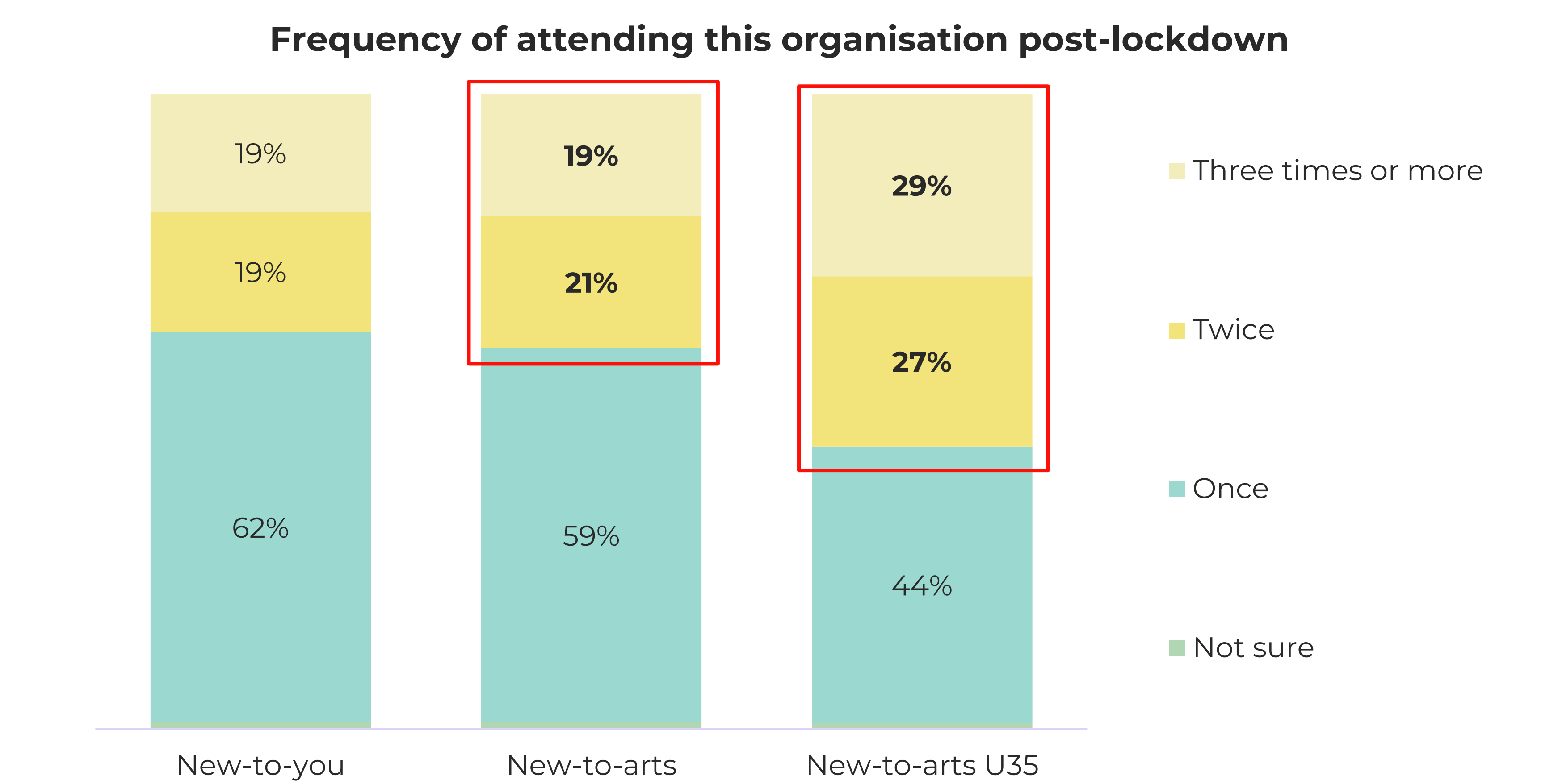
In fact, many audiences already have come several times to you post-lockdown, particularly under 35 new-to-arts audiences. Is this an increased loyalty amongst new audiences, perhaps loyalty to the familiar?



Approximately how many times have you visited this organisation SINCE venues reopened after the COVID-19 pandemic (from summer / autumn 2021)? n=10,050

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A familiar venue can provide reassurance and help new audiences to return.

> *"I would probably go [somewhere new] if I liked the idea of the content, but there is a sense of familiarity and comfort with going somewhere I've already been, because I already know, like this is how I go in, this is how my tickets get checked, this is the kind of thing I'm going to feel whilst I'm sat in their chairs and this is how I'm going to feel in the crowd, and how big the crowd is going to be."*

(Female, British Asian, 18-34)

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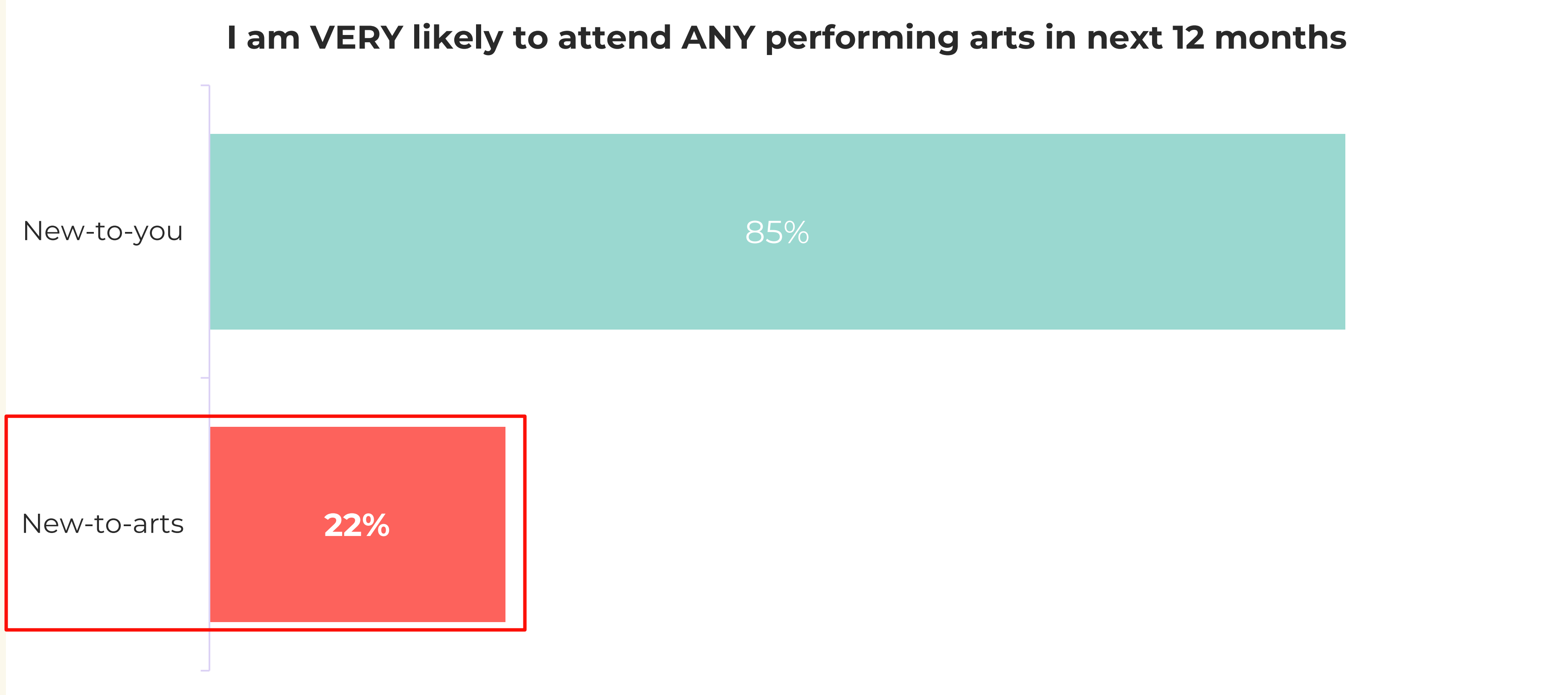
Despite intending to return to you in the next year, only 22% new-to-arts audiences say they plan to attend "any performing arts". There appears to be a disconnect between the experience they have had and would like to repeat and that limited concept of "the performing arts". They don't necessarily see themselves as an arts attender.



How likely is it that you will attend ANY performing arts events in the next 12 months? n=9,210

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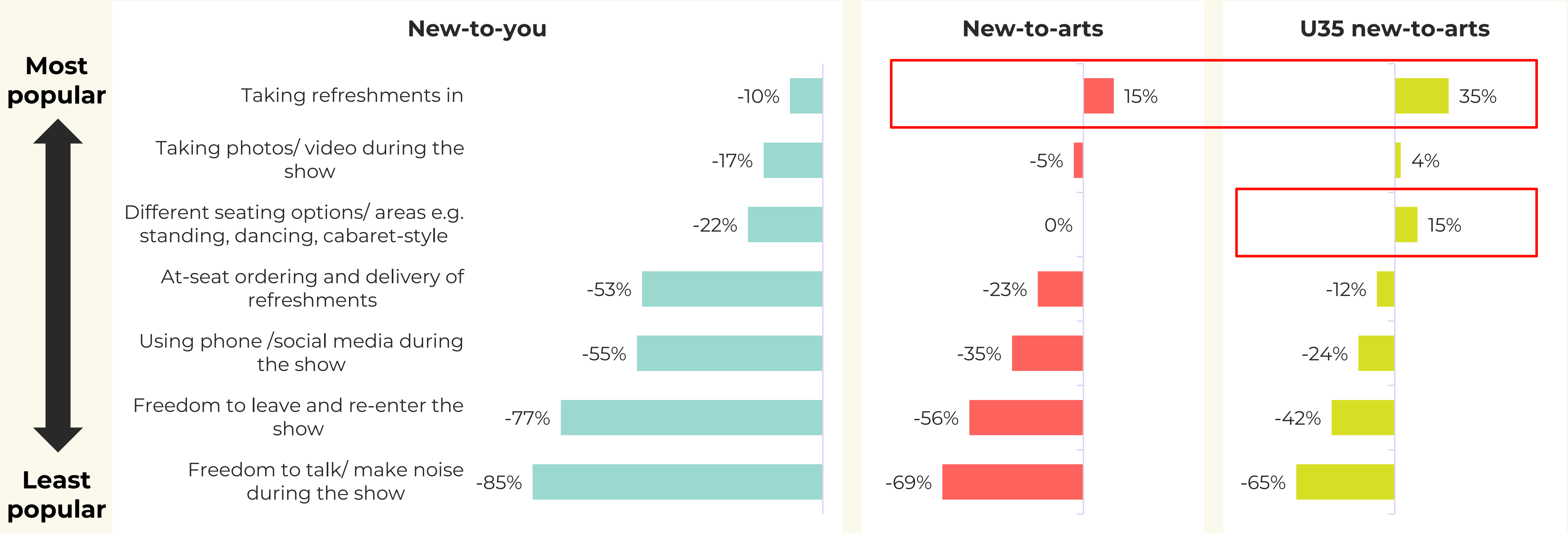
Overall, most audiences would **not** be encouraged to attend by changes to the auditorium experience, although refreshments are important to new-to-arts audiences and under 35s are interested in different seating experiences.

A negative score means more people said it would make them ***less likely*** to attend; a positive score means that more people said it would make them ***more likely*** to attend

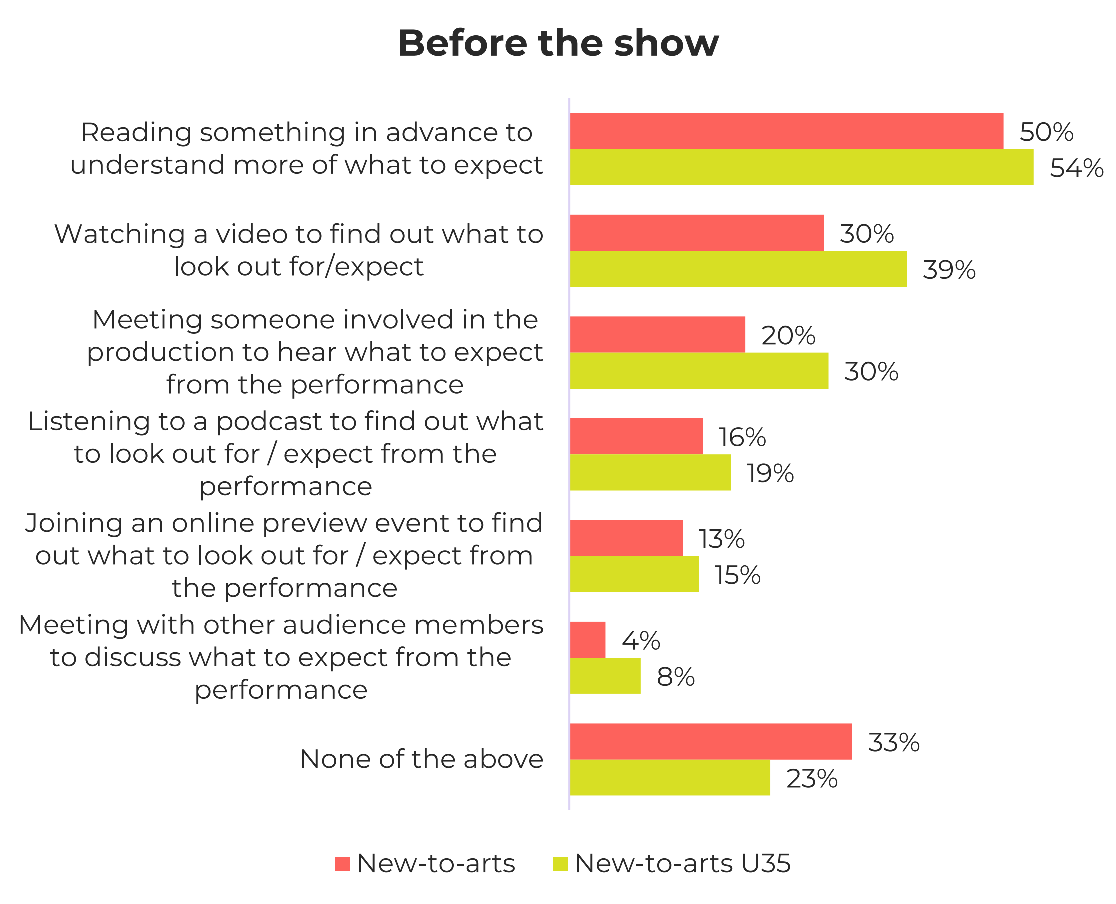
Net difference in likelihood of attending

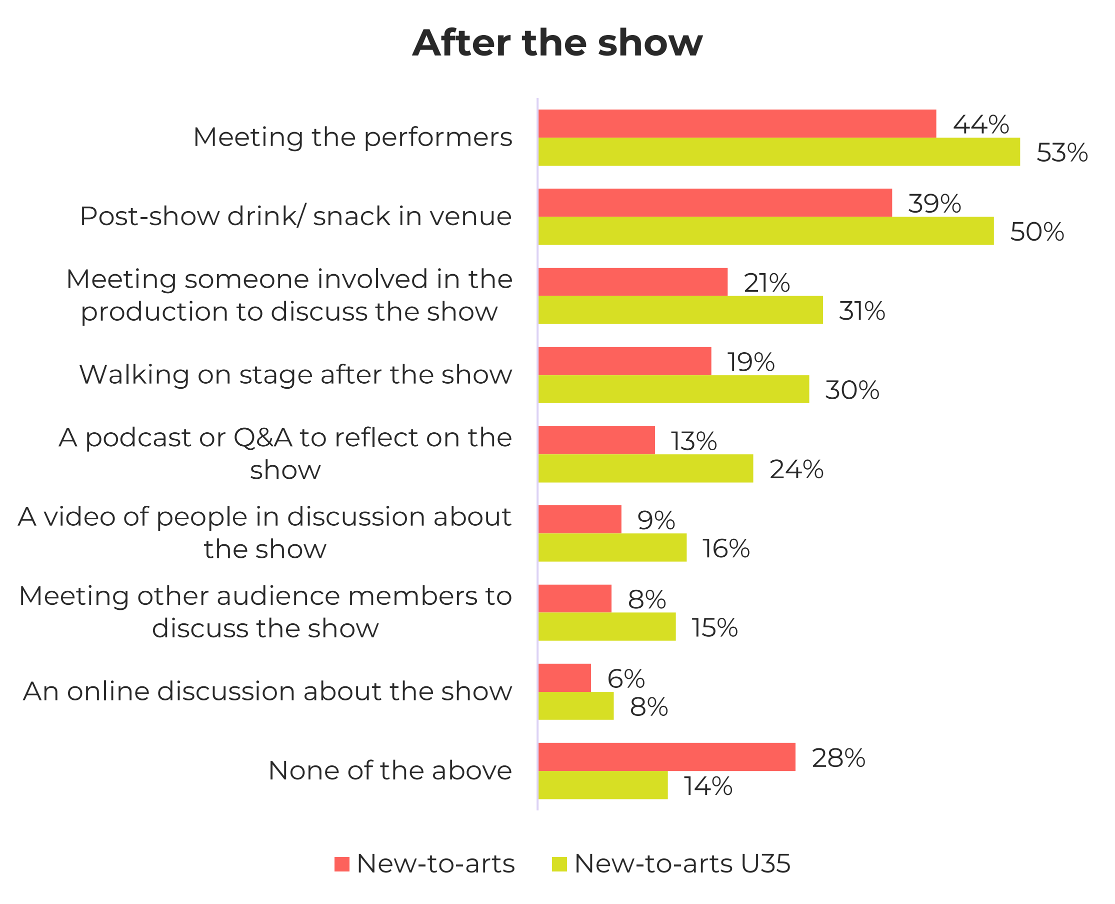
More likely minus less likely



Would you be less likely, or more likely to attend if the following were offered DURING the performance? (Select all that apply) n=8,787

All audiences were interested in pre-show and post-show opportunities to engage, but younger new-to-arts audiences were much more likely to want to take part in post-show socialising and discussion.





Would you be interested in doing any of the following if offered BEFORE/ AFTER the performance? (Select all that apply) n=8,787

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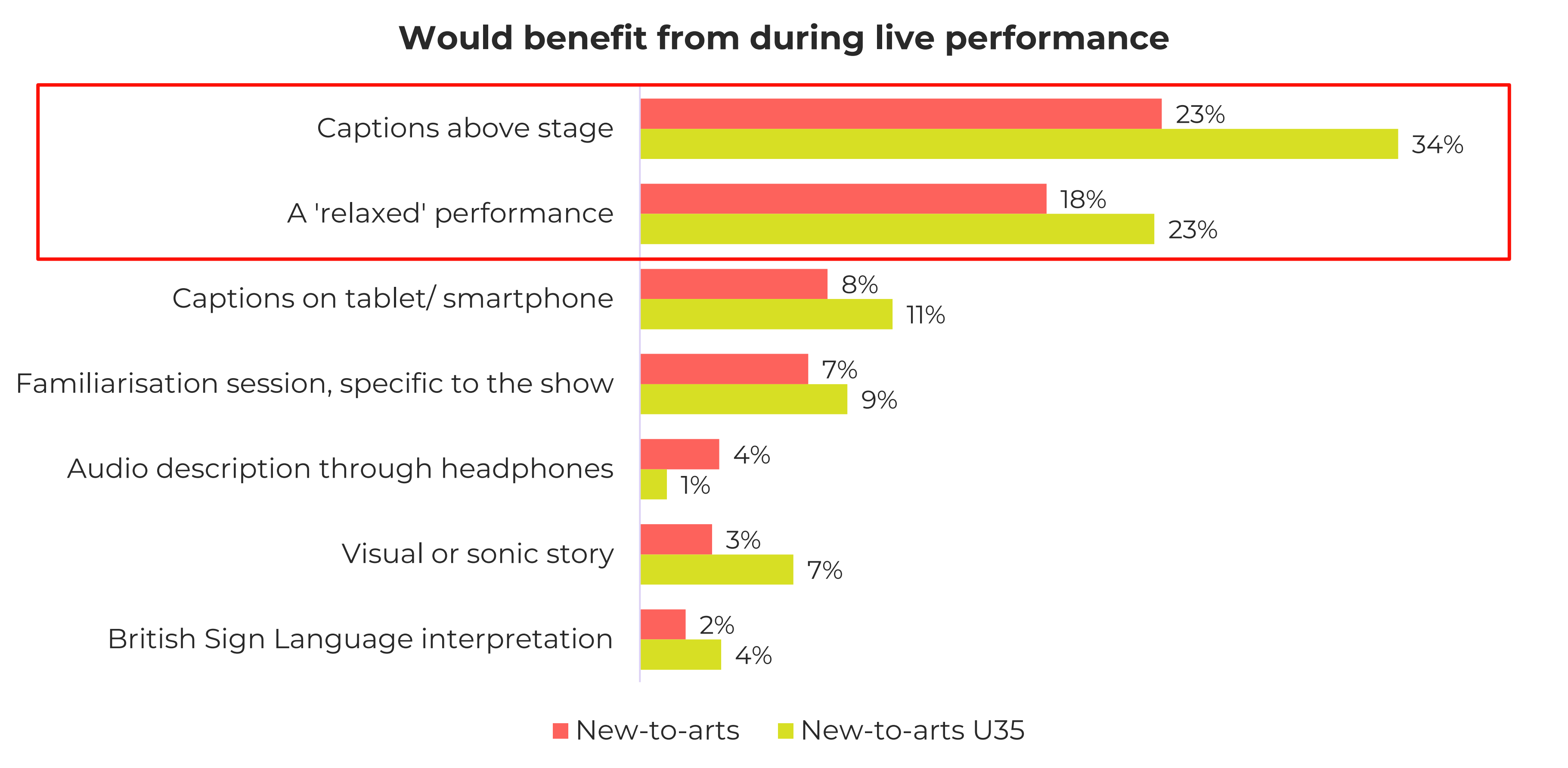
Many new-to-arts audiences would welcome additions to the performance to increase inclusivity, especially captions, which would be welcome by over a third of under 35 new-to-arts audiences. This demonstrates how increasing inclusivity increases access for all.



Do you think you would benefit from any of the following options during a live performance? n=8,787

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Section 8

Summary and recommendations

By leveraging the opportunities highlighted in this report, organisations can forge stronger connections, cultivate lasting relationships, and pave the way for a vibrant and sustainable future in the arts and culture sector.

1. We're experiencing an historic opportunity to build loyalty among first-time audiences. For the first time in a decade or more, this crucial segment of our audience is growing in overall size and returning more frequently than before.

2. New-to-the arts attenders represent a younger, more diverse segment of our audience, who demonstrate high levels of satisfaction with the performing arts and high intention to return.

3. These new attenders do not currently align themselves with the "performing arts" generally and can sometimes see themselves as outsiders.

4. First time attenders need "introducing" to an organisation or its work, usually by another person – but familiarity with the work or centering the experience around a special occasion are also key factors.

5. Barriers to first time attendance are often practical or based on perceptions of value.

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Recommendation #1

Boost the Motivators:
Referral schemes

How could we use the power and number of our existing audiences – whether new or not – to introduce a friend?

It could be someone who has come for the first time and had such an amazing experience that you could encourage or incentivise them to come back – yes, even to the same show – with a friend.

Or it could be your most loyal audiences: make them part of your marketing effort by introducing you to new people and literally bringing them along, perhaps for an incentive.

As a sector we currently don't have well established referral schemes, but plenty of others do.

Remember when Uber launched and we all shared codes madly so that we could save on our trips by sharing the code with others, who also got cheaper rides? How might we do that for the arts?

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Recommendation #2

Boost the Motivators:
Use automation to help you find what's "familiar" to them

What is "familiar" to me will not be the same for you. With first-time bookers we have **one** booking to go on, and with huge numbers of new attenders, it can seem impossible to find what might be "familiar" to each individual.

We're going to need to test a lot of things at scale and speed. No marketing team in the world has the time and resources to do that manually.

So harnessing whatever email and social media automation tools you can access to do that testing will increase your chances of finding something that appeals.

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Recommendation #3

Boost the Motivators:

Give them more “special occasions”

We’ve seen consistently in all our data post-lockdown increasing numbers of people saying they are attending for social reasons, celebrations or special events.

How often do we suggest to our audiences that **we** are the answer to a special occasion?

Do you have a special occasion package that can be added onto any show?

Do you regularly suggest occasions for which attending the performing arts is the answer?

Could we adopt this approach more generally and more regularly, rather than only when we have a particular show? Girls’ night out, date night, end of exams, Mothers’ Day, big birthday etc.

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Too hard

Recommendation #4

Reduce the barriers:

Frame the user experience for first-timers

Make sure you have the basics down: smooth and easy online booking and pre-visit information on your website and via email so people don't have to worry about directions, what food and drink is available, when the venue opens, where to park the car, or any other practical concern.

And how do you help people navigate your programme? How can a potential new attender identify what's for them and what isn't? How do you help them create an itinerary of discovery?

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Recommendation #5

Reduce the barriers:

Focus on value not price

Addressing poor value needs ways to reassure audiences.

Instead of focusing on memberships and discounts, focus on value:

- Testimonials from customers
- Customer satisfaction scores and ratings
- Comparisons with other ‘good value’ experiences

What else could they be spending their time on and how can we reassure them that time with us is time well-spent?

Connecting with loved ones, improving their wellbeing or escaping from everyday life were all identified as benefits of attending the performing arts. Let’s remind people that this is a great use of their time.

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Recommendation #6

Know your numbers

If you're not already, start tracking:

- the percentage of new attenders in your audience (and are they new to you or new to the arts as a whole?)
- annual retention of all bookers and new bookers: use the Spektrix calculator to help you.

Compare your data to the benchmarks in this report to give you a relative picture of how you are doing.

Being part of our flagship post-event surveys, Indigo Share: Subscription will allow you to do this ongoing. Talk to us if you want to know more.

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Recommendation #7

Keep listening to new audiences

Create research plans that highlight the voices of new audiences: these are the voices you need to be listening to if you are to grow loyalty with these audiences.

Don’t let your findings be swamped by the (sometimes very loud) voices of existing audiences and attenders.

Separate out your responses from new and returning audiences and look for the clues in the differences.

All Indigo Share subscriptions now offer the ability to compare responses between new and returning customers across a range of metrics.

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Appendices

- Aggregate data details and methodology
- New-to-you audience profile
- New-to-arts audience profile
- About Indigo
- About Spektrix

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Spektrix aggregate data details and methodology

Spektrix audience retention data is intended to allow for analysis of how many ticket bookers were retained by the same arts organisations over two years or more; for example, how many people bought a ticket for a given theatre in 2022, and also in 2023. Throughout 2023, Spektrix monitored ticket sales in 2023 against the equivalent calendar month in 2019, helping the sector to track recovery and overall attendances post-lockdown.

The data looks at ticket bookers, rather than attendees. This means that some individuals may not be counted as retained if they purchased a ticket in one year, and someone else purchased on their behalf in another. Some customers may be counted as first-timers if they booked tickets on their own behalf in a given year, having previously had them booked by others. Data is drawn from 319 of the 400+ arts, culture, and entertainment organisations which use Spektrix in the UK, ranging from small regional theatres to major international arts centres. To ensure that the data is not skewed by outlier periods, organisations are only included if the number of unique bookers or first-time bookers who purchased a ticket in the relevant calendar year is 1,000 or greater. We do include historical data for organisations who changed systems and migrated records during this period, ensuring that percentage changes are not skewed by changes in the Spektrix client base. Calculations are made at organisation level and then aggregated (e.g. organisation x has a reattendance rate of 24.2, organisation y has a rate of 24.4 - the average is 24.3).

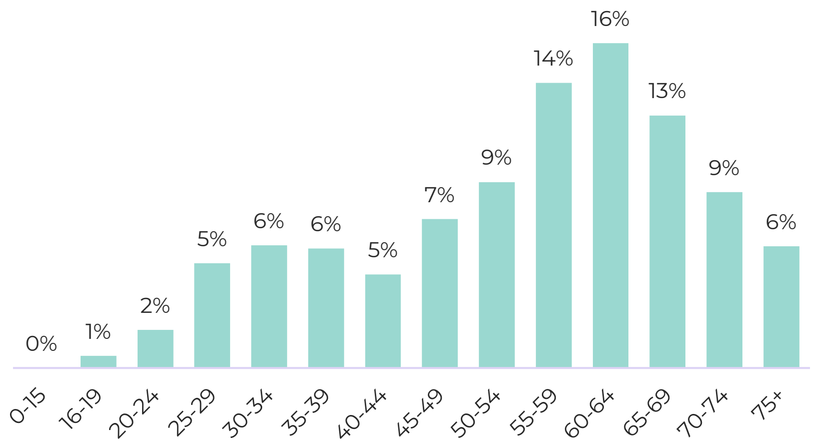
Interested in understanding any of the data in more detail? Drop us a line on hello@spektrix.com.

The **Largest Organisations** in our data represent just over 30 users in England, Northern Ireland, and Scotland, and include a range of artforms and business models including arts centres, classical music organisations, festivals, touring companies, and venues. The majority of these organisations are in England, with fewer than 10 of them being based in London. These organisations saw a median number of 42,000 unique bookers purchasing tickets in 2022.
The **Smallest Organisations** in our data represent just over 330 users in England, Northern Ireland, and Scotland, and Wales and include the full range of artforms and business models Spektrix serves including arts centres, classical music organisations, festivals, touring companies, and venues. The majority of these organisations are in England, with just over 70 of them being based in London. These organisations saw a median number of over 10,900 unique bookers purchasing tickets in 2022.
Organisations in London in our data represent just under 80 users, and include a range of artforms and business models including arts centres, classical music organisations, festivals, touring companies, and venues. These organisations saw a median number of 10,900 unique bookers purchasing tickets in 2022.
Organisations outside London in our data represent just over 280 users in England, Northern Ireland, Scotland, and Wales, and include a range of artforms and business models including arts centres, classical music organisations, festivals, touring companies, and venues. The majority of these organisations, around 240 in total, are in England. These organisations saw a median number of 12,000 unique bookers purchasing tickets in 2022.
Interested in understanding any of the data in more detail? Drop us a line on hello@spektrix.com.

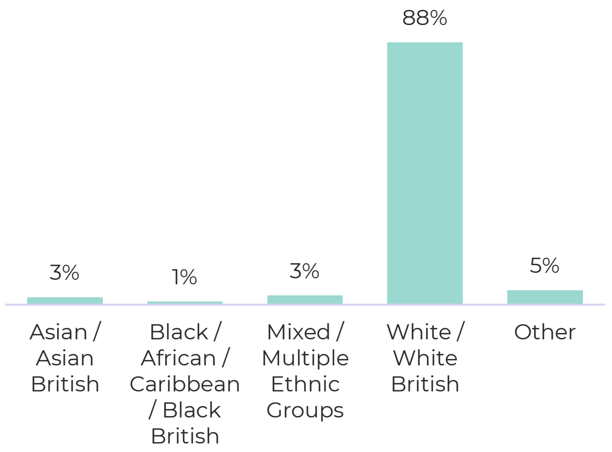
New-to-you audience profile

Audience surveys

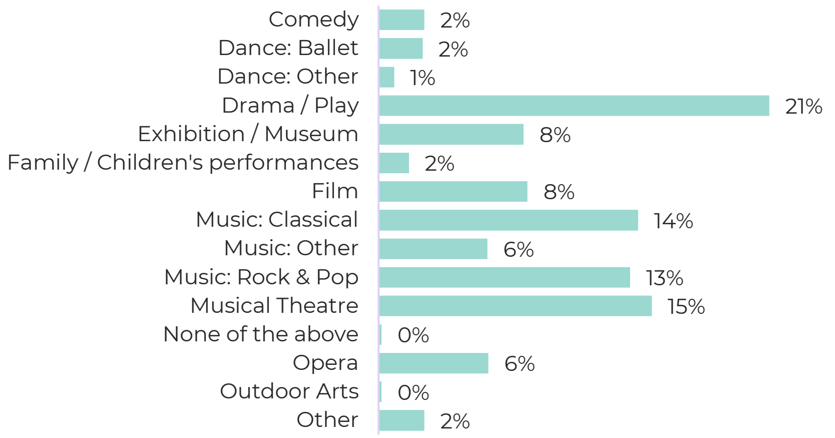
Age



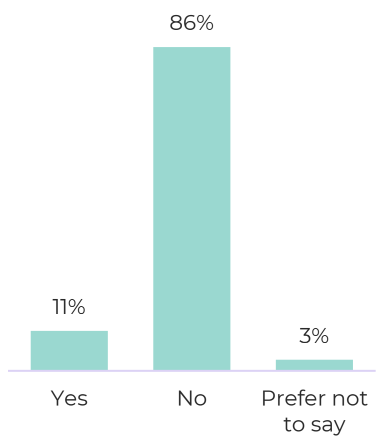
Ethnic background



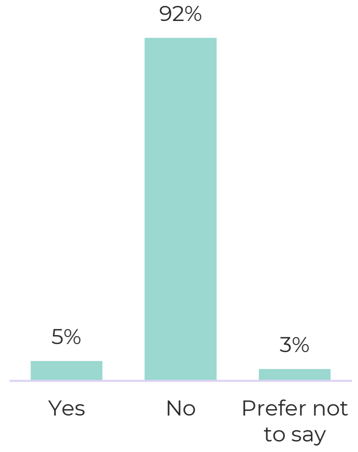
Attend most often now



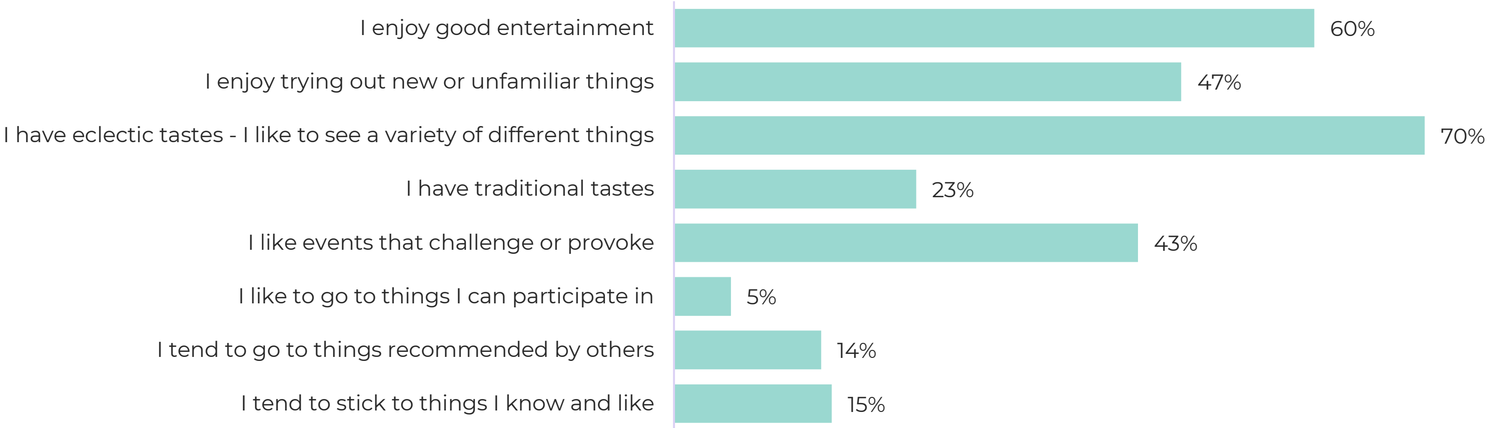
D/deaf or D/disabled



Neurodivergent



Artistic preferences



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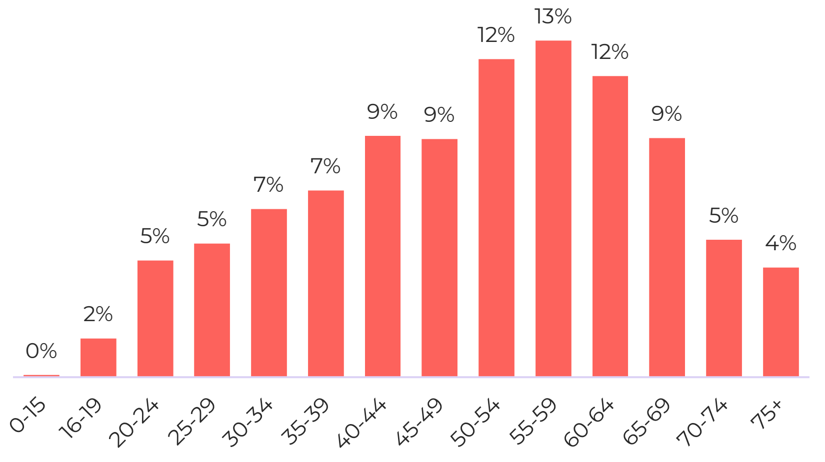
New-to-arts audience profile

Audience surveys

Age



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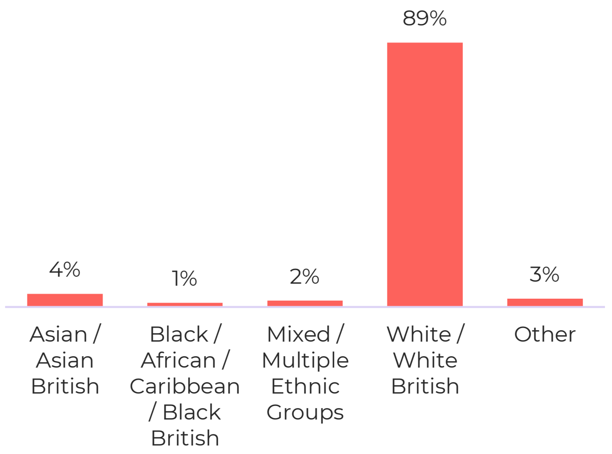
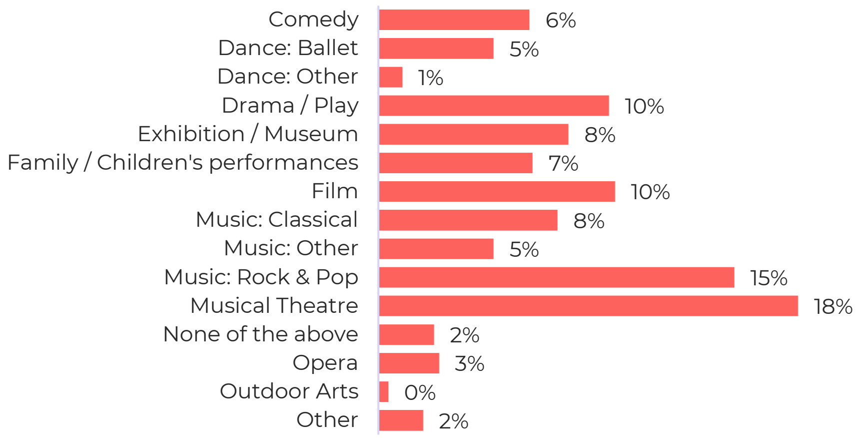
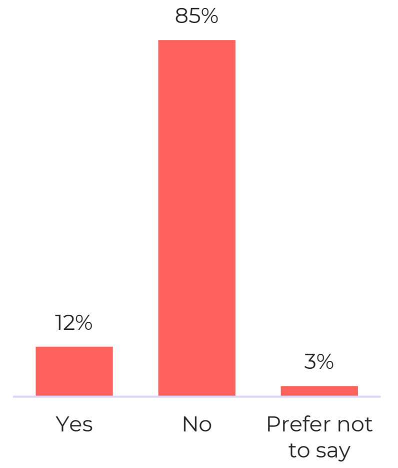


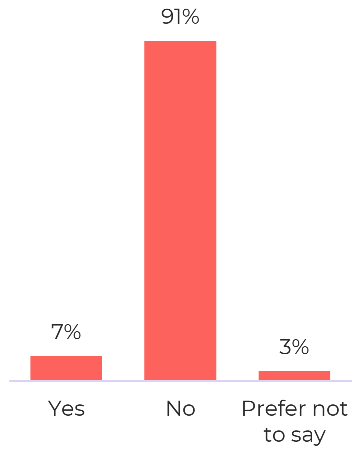
Attend most often now



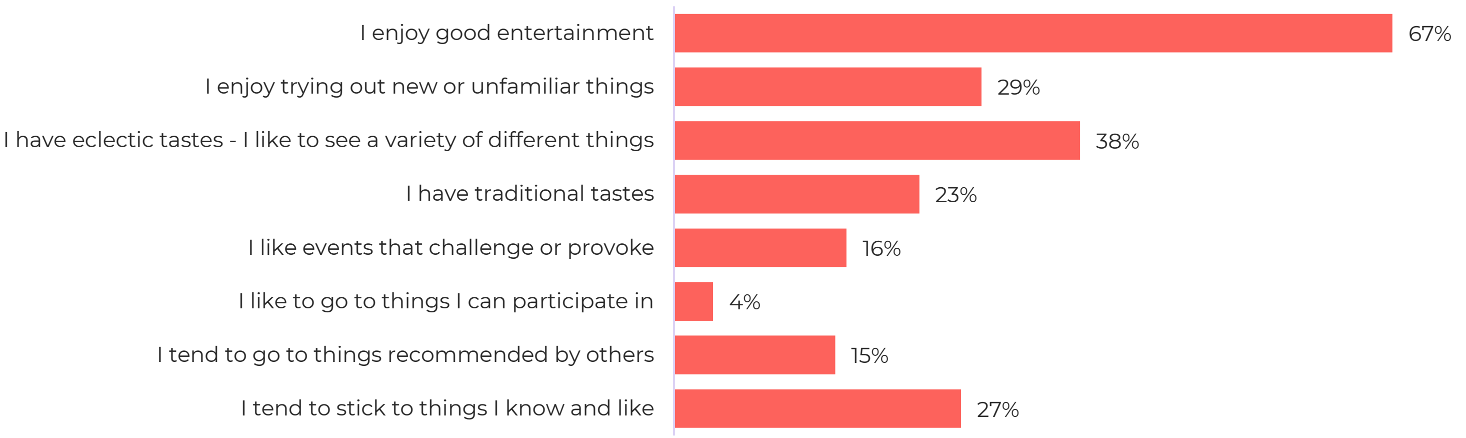
D/deaf or D/disabled



Neurodivergent



Artistic preferences



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About Indigo

Indigo are award-winning audience specialists.

We work individually with arts and cultural organisations to bring the audience's voice into decision-making, as well as running sector-wide research projects on particular issues and topics.

Our ground-breaking sector-wide research during the Covid-19 crisis included *After the Interval*, the *Culture Restart Toolkit* and *Missing Audiences*. It was used by over 500 cultural organisations and gathered over 500,000 responses, and won us multiple national awards, including a national Outstanding Leadership award for Katy Raines, Indigo's CEO.

You can see all our previous reports, plus the latest articles and insights on our blog.

In 2023, we launched Indigo Share: the collective approach to audience insight:

- Subscription – an annual programme of post-visit surveys and 1-2-1 support.
- Hot Topic – FREE ad hoc surveys responding to particular topics and sector challenges.
- Co-Create – a collaborative and cost-effective way to access bespoke research.

If you are interested in finding out more about Indigo Share or would like to speak about a potential project, please email us:
info@indigo-ltd.com

Or book in a call with one of the team:
Katy Raines, CEO | Book a 30 minute call
Flo Carr, Associate Director | Book a 30 minute call
Kerry Radden, Associate Director | Book a 30 minute call

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About Spektrix

Spektrix works in partnership with over 650 creative and innovative arts and cultural organisations, providing them with cloud-based technology for ticketing, marketing, and fundraising - and the expertise they need to make the most of it. Spektrix connects a rich network of fellow professionals and industry experts, empowering teams to reach wider audiences and build deeper relationships.

Spektrix software is designed and built in a way that allows us to access and aggregate data across every organisation we work with. Because each of those organisations uses the same, cloud-based version of the system, we can track patterns centrally, spot trends, and analyse data across our whole community. We're fairly certain that this structure provides the largest single dataset of audience activity that exists in the cultural sector.

By publishing our data we aim to support closer relationships between audiences, donors, and arts organisations. This is just one of the ways in which we fulfil our mission as a technology partner to the sector, and we've been sharing our insights in various formats since 2014.