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LIVEANALYTICS

STATE OF PLAY: THEATRE UK

Growing, evolving, diverse

MRS Evidence Matters™ Company Partner

About LiveAnalytics

LiveAnalytics, a division of Ticketmaster International, is a provider of consumer insight and business intelligence on events, entertainment and ticketing.

We deliver sophisticated data products and services that help to improve customer retention, maximise ticket sales, and increase upsells.

These range from dedicated research resource to access to our International customer database, Live Insight (with more than 60 million individual customer records across 12 markets), with which we produce unique customer insight.

In the UK, LiveAnalytics leverages data from Ticketmaster's massive database of 11m plus fans. Overlaid with in-house and licensed demographic data, LiveAnalytics offers information on fan preferences, and ticketing trends to give artists, venues and teams unrivalled insight into how, where and to whom they can sell tickets – and, afterwards, measure the effectiveness of marketing campaigns while events are still on sale, to optimize results and ROI.

State of Play: Theatre UK is the second in a series of reports published under the LiveAnalytics banner by the Insight team at Ticketmaster International, as part of our drive to better understand the live entertainment sector and its audiences. The first 'State of play' report was published in 2012 on festivals in the UK.

For more information about our services, please contact: LiveAnalytics@Ticketmaster.co.uk

Ticketmaster is an MRS Company Partner and our Live Analytics division adheres to the MRS Code of Conduct and MRS Company Partner Quality Commitment whilst undertaking research.

PUBLISHED BY:

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Foreword

Growing, Evolving and Diverse

Our research presents an overwhelmingly positive picture of the UK theatre industry. People from all backgrounds, ages and walks of life are streaming into playhouses across the UK bursting with opinions and full of love for the work within.

That said, there are lessons to be learned from our data. Theatre industry figures will find surprising revelations about subsidised theatre, ticket pricing and programming. Our assessment of how audiences find out about shows will be of interest to communications directors too.

This isn't a simple demographic study – we're looking not just at who attends the theatre, but at why they attend, where they go, and how they come to be there. *State of Play: Theatre UK* is a 360 degree product of immeasurable value to creative and business professionals working in UK theatre.

Growing: Theatre is central to the cultural life of our nation. 63% of the UK population has been to at least one theatre show in the past year – that's more than sporting events and music concerts.

London's West End, and major musicals more generally, remain a colossal draw. With near universal awareness for the Phantom of the Opera, Les Misérables and the Lion King, they are also considered some of the nation's favourite shows. The majority of theatregoers are keen to increase the number of plays and musicals they attend this year and next.

Evolving: From both creative and business perspectives, the industry is entering a new phase of experimentation. The tastes of theatregoers are expanding, with interactive and streamed theatre both well received, particularly amongst younger audiences.

On the other hand, we found mixed responses to some of the industry's innovations. The restoration levy polarised opinion in principle, though there was more of a consensus on the need for clarity about what it covers. Sponsorship, memberships and special access schemes are on the whole well received, though they don't reach a large proportion of attendees, suggesting there is more scope for growth.

Diverse: Perhaps the most surprising fact unearthed by our survey was that likelihood to attend the theatre was highest amongst 16-19 year olds. Audiences have been growing proportionally younger for some time, as reflected in our transactional data, with a 71% increase amongst 16-25 year olds since 2009.

With that in mind, the report also found that social media is important, playing a large part in both how people find out about theatre (word of mouth being the primary source) and how they themselves spread the word (with one in five writing reviews of shows they have seen).

The theatre world has been insecure about its future for years now, but our report shows there is little reason to be cautious. With considered experimentation, bold programming and, most of all, a real dialogue with audiences, theatre in the UK will continue to boom.

Mark Yovich,
President, Ticketmaster International

Executive summary

- 76% of the UK population have been to at least one theatre show in the past three years – this includes plays, musicals, dance and opera but excludes music and comedy
    - 16-19 year olds more likely to attend than any age group
    - The majority theatre attendees are 25-44 years old
    - Theatre attendees are most likely to also attend the cinema, followed by arts (gallery & museums events)
- Cost of attending the theatre is the main barrier-to-entry for both attendees and non-attendees
    - Second highest barrier for attendees is ticket availability
    - Second highest barrier for non-attendees is lack of interest
- Two in three theatre attendees want to maintain or increase the number of musicals and plays they attend this year
- Word of mouth is the primary source of information for theatre attendees, followed by event or venue website
- Just over two in five (42%) attend the theatre with their partner
    - One in five attend the theatre as a treat or because of their interest in theatre (21% and 20% respectively)
- Over two in five (44%) have cried at the theatre and a similar amount (41%) have laughed when not intended
    - 29% have checked their phone during the performance, though only 8% think this is acceptable theatre behaviour

WHAT IS YOUR MOST MEMORABLE THEATRE EXPERIENCE?

“ **SATURDAY NIGHT FEVER** FRONT ROW!!! FELT LIKE I WAS ACTUALLY IN IT. THE ATMOSPHERE WAS AMAZING AND EVERYONE WAS UP DANCING FULL OF ENERGY ”

“ WHEN I WAS TAKEN TO SEE MY FIRST THEATRE SHOW. MY PARENTS TOOK ME TO SEE **LES MISERABLES** WHEN I WAS 11 AND I HAVE LOVED THE THEATRE EVER SINCE ”

“ TOO MANY TO LIST IN 70 YEARS OF THEATRE GOING! BUT TAKING MY 3 YR OLD GRANDDAUGHTER TO HER FIRST THEATRE, ON THE EDGE OF HER SEAT THROUGHOUT, AND WEPT AT THE END BECAUSE SHE WANTED TO SEE IT ALL OVER AGAIN, MUST BE ONE ”

“ THE FIRST TIME MY CHILDREN WENT TO A PANTOMIME - TO SEE HOW MUCH THEY ENJOYED IT WAS OUTSTANDING ESPECIALLY THEIR FACES DURING AND AFTER ”

“ WATCHING **WAR HORSE** AT THE NATIONAL WITH MY SCHOOL. I FOUND THE SPECIAL EFFECTS AND PUPPETRY SO MOVING THAT I CRIED ”

“ SEEING **PHANTOM OF THE OPERA** WITH MY MUM YEARS AGO. THE JOY ON HER FACE DURING THE PERFORMANCE AND THE RAPTURES SHE WAS IN AFTERWARDS WILL ALWAYS BE ONE OF MY HAPPIEST MEMORIES ”

Introduction

Theatre, one of the oldest and most familiar artforms in the world, spans centuries, societies and customs. Its place in society, its structure, content and funding have all evolved and changed with the times. It has in turn been an inspiration and foundation for the development of other forms of entertainment (from the high to the low brow), and plays from Sophocles to Shakespeare have to a large extent influenced the way we think, speak, enjoy and express ourselves today.

Despite a decline in public funding, on which the UK theatre sector is heavily reliant, theatre is a big part of people's lives. It is one of the most pervasive art forms and pastimes and, at the same time, is a big driver of UK tourism.

A large majority (76%) of the UK population has been to at least one theatre show (including plays, musicals, opera and dance performances) in the past three years, with 63% attending once in the past year – more than music concerts (53%) and sporting events (47%).

Furthermore, theatre is no longer a preserve of the elite few or a rare special occasion – more than half (58%) of theatre attendees went to two or more performances in the past year.

Theatre attendees

Theatre experience:

"BEING GIVEN A BOX SEAT ALMOST LITERALLY ON THE STAGE AS AN ANNIVERSARY GIFT"

Demographics

Age

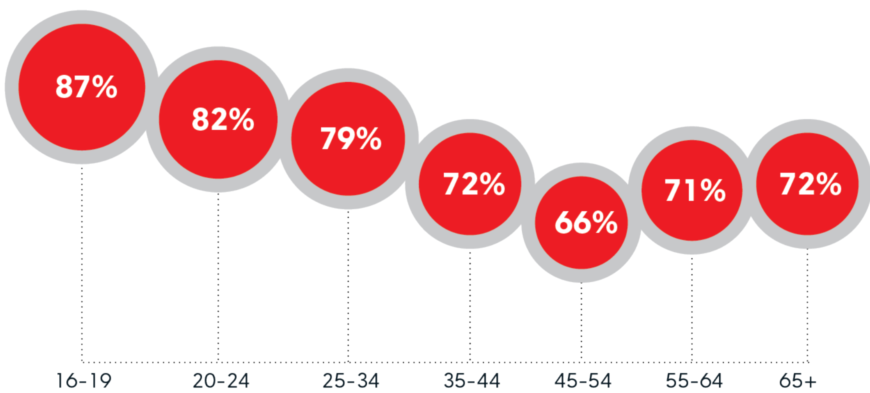
Contrary to the common preconception that theatre is better at attracting older audiences, **likelihood to attend the theatre decreases by age** but starts picking up from 55+ year olds. Accordingly, 16-19 year olds are more likely to attend the theatre than any other age group (when indexed against their own age-group).

Even so, people between 25-44 years old account for the majority of theatre attendees and the younger demographics are consequently under-represented as theatre audiences, despite their high likelihood to attend.

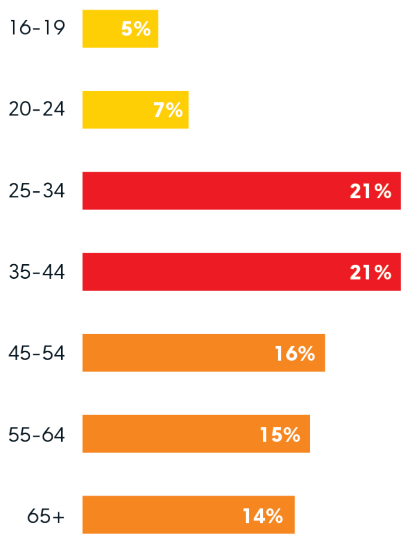
Gender

There is a heavy female skew, though this is balanced out amongst 45-54 year old attendees.

LIKELIHOOD TO ATTEND / AGE



AGE OF ATTENDEES



Household income & regional breakdown

Theatres attract attendees from a very wide distribution of annual household incomes, though the majority (31%) come from households with an annual income between £20k-£39k. Though age isn't the best predictor of theatre attendance, there is a **correlation between attendance and household income**, whereby likelihood to attend the theatre amongst the UK population steadily increases with household income.

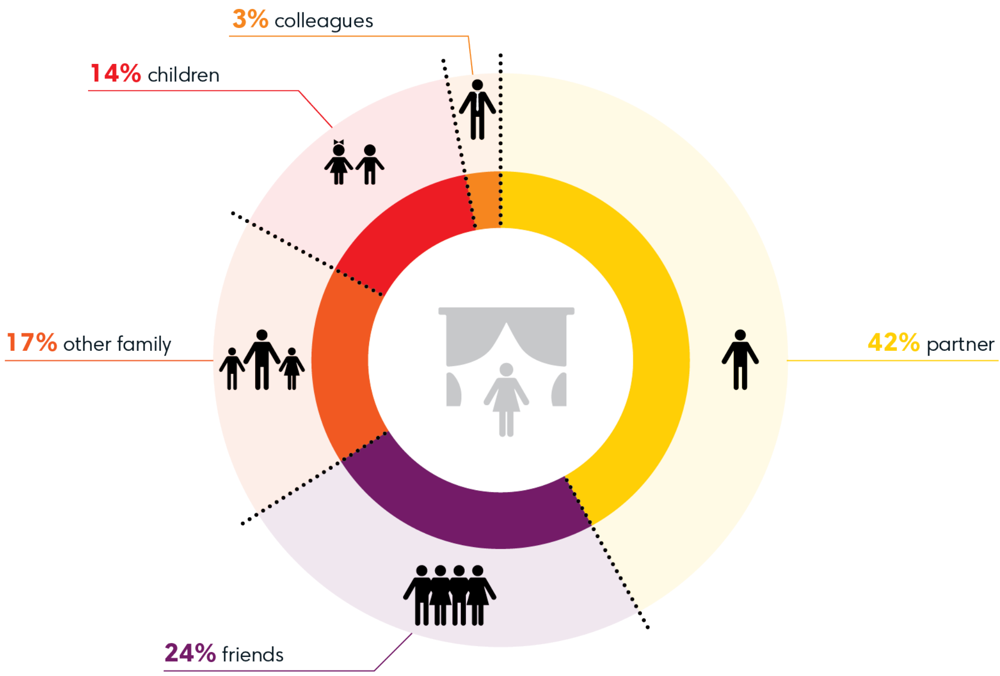
London and the South East combined account for 26% of theatregoers, where likelihood to attend was also high. People from the East Midlands were least likely to attend a theatre show, with only two in three having attended at least one in the past three years.

Close to two in five (38%) attendees have children, most of which are over 20 years old.

Attendance details

Theatre is very much a **social experience, with the majority (38%) of attendees going in groups of three** and a further 36% attending in groups of four or more, mostly with their partners (67%) or friends (39%).

WHO DO YOU USUALLY ATTEND WITH?

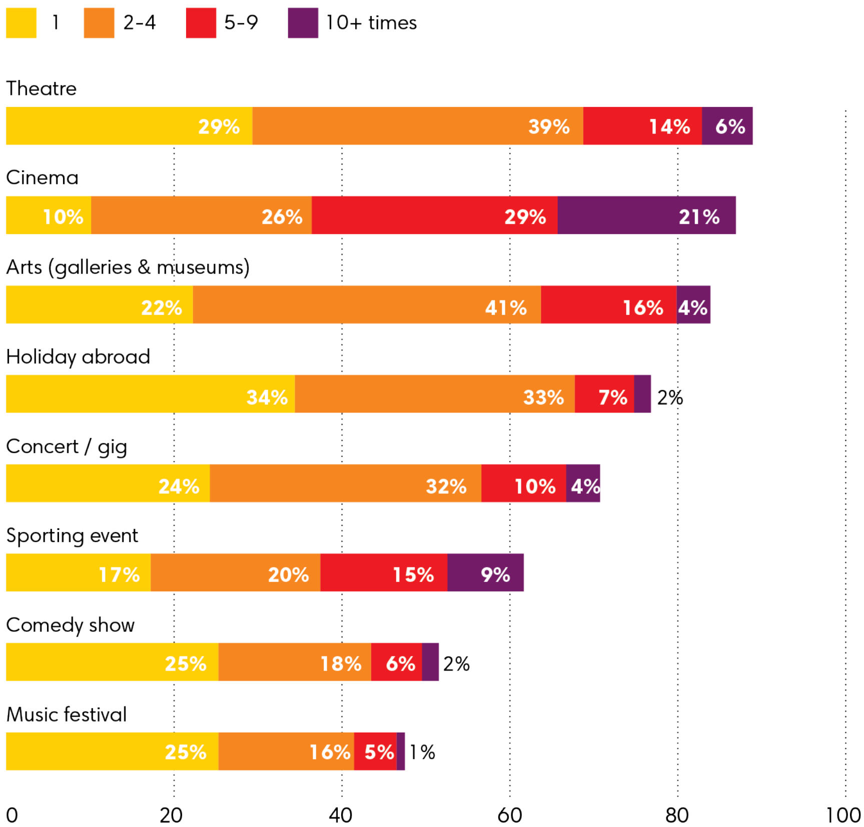


Theatre experience:

"I HAVE A LOT OF MEMORABLE ONES FROM OUR LOCAL THEATRE - MAINLY JUST THE CAMARADERIE THAT EXISTS AFTER A PERFORMANCE WHEN A GROUP OF PEOPLE - OFTEN UNKNOWN TO EACH OTHER GATHER TOGETHER TO GO FOR A DRINK AND DISCUSS THE PLAY/SHOW."

Theatre attendees are most likely to attend the cinema, followed by arts (gallery & museum) events – they are least likely to attend a pure comedy show and a music festival.

EVENTS ATTENDED IN 2012
AMONGST THEATRE ATTENDEES



Code of conduct

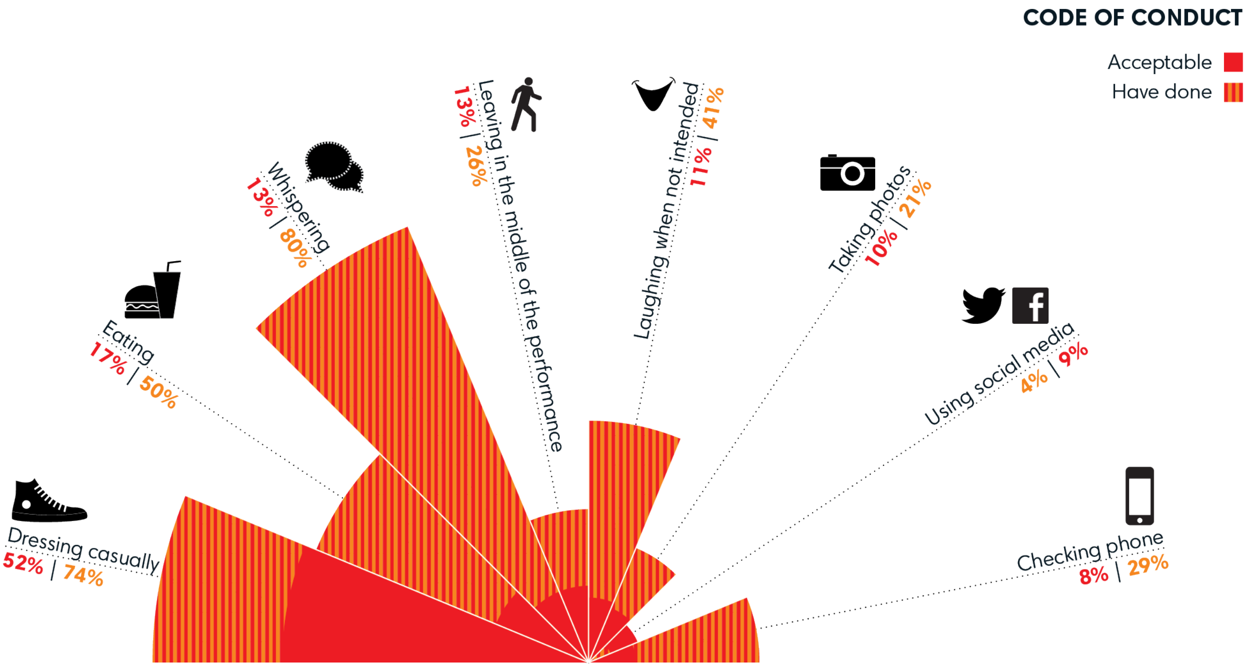
Most theatre attendees regardless of age will almost unanimously consider some behaviour unacceptable at the theatre. However, **more than half (52%) think it's acceptable to dress casually at the theatre**, though this increases significantly amongst 16-19 year olds (72%).

And although just over one in eight consider whispering unacceptable at the theatre, eight out of ten admit to having done it at some point during a performance.

Smartphones & social media

Checking one's phone during a performance is considered the least acceptable, though more than one in four have done it at least once. Theatregoers between the age of 25 to 34 are most guilty of checking their phones during a performance and they are also almost twice as likely to think of this as acceptable than the average theatregoer.

Close to one in four (24%) Tweet about the performance they're about to see or have already seen, increasing to nearly half (47%) of 16-19 year old attendees. Two in five have bought music related to the performance after their attendance and 31% have read the script (32% of them before the performance itself and 61% after).



Theatre experience:

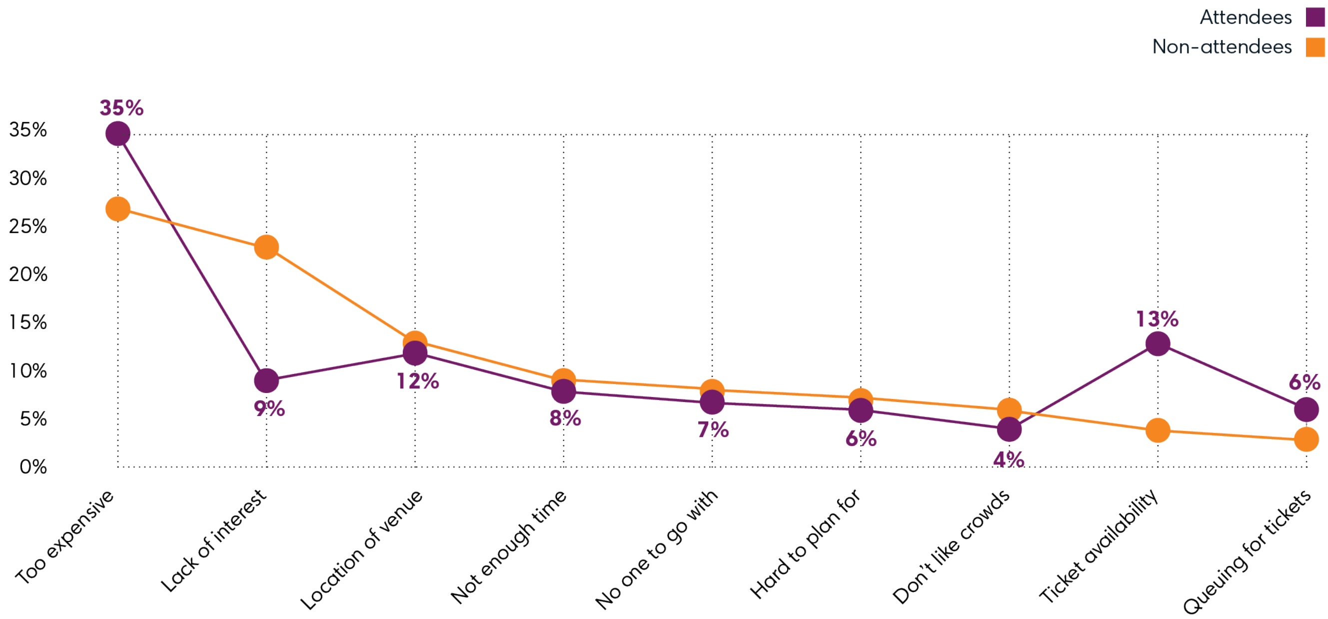
"DREAMBOATS AND PETTICOATS TOOK ME BACK TO MY YOUTH"

Barriers to entry

The cost of attending the theatre (too expensive) is the main barrier to entry amongst non-attendees (27%), suggesting that more money-friendly schemes would encourage or enable more people to attend. A further 24% cited external pressures, such as lack of time and hard to plan for as reasons for non-attendance. On the flip-side, 23% don't go to the theatre simply due to a lack of interest.

Similarly, the **cost of attending the theatre is the main barrier for theatregoers** as well (35%), again suggesting that with more affordable prices attendees would likely go to more performances a year. However, over one in four theatre attendees consider logistical issues, such as ticket availability and location of venue as their main reason for not going to more performances.

PRIMARY BARRIERS TO ENTRY



What do people like?

Immersive experience

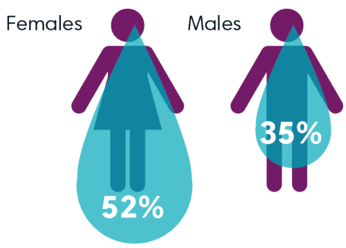
The theatre experience has been described as something **unique, intimate and immersive** and is one of the most often cited reasons for attendance. Impressive sets, a long-standing interest in theatre nurtured from childhood and the live energy and great atmosphere are some of the other reasons people refer to when explaining why they enjoy the theatre more than other types of entertainment, "I like the atmosphere. I like to be close to the stage, and I love the costumes and scenery, it is visual and aural and emotional and intellectual."

By actively engaging most senses and very often the mind too, it is sometimes seen as a more mature, emotional, dramatic, sophisticated and fun form of entertainment – even so, around 29% of theatre attendees have fallen asleep at least once during a performance.

Over two in five (44%) have cried at the theatre, of which 7% cry frequently. And though more than half (52%) of female attendees have cried at least once during a performance, male attendees are not exempt from shedding a tear, with over one in three (35%) having also cried during at least one theatre performance.

For those who have been to the theatre in the UK from abroad, 62% said their visit was influenced by the cultural scene in the UK, with the majority (62%) visiting for a holiday, followed by close to one in four (24%) who were visiting friends and family.

CRYING AT THE THEATRE



Type of theatre

Most theatre attendees have been to at least one musical (75%) or play (72%) in the past year. Fewer (38%) have been to a dance performance and even less (27%) have been to the opera.

Just over **one in four (26%) of theatregoers recognise they have been to subsidised/ publicly funded theatre**, though this is higher amongst UK residents (29%) and significantly higher (47%) within the North East.

Theatre experience:

"MISS SAIGON – I COULDN'T SPEAK AT THE END OF IT BECAUSE I WAS SO EMOTIONAL AND THEN BURST INTO TEARS ON THE WAY OUT. WE THEN WENT TO A NEARBY RESTAURANT FOR DINNER AND I BURST INTO TEARS AGAIN WHEN I WALKED INTO THE RESTAURANT"

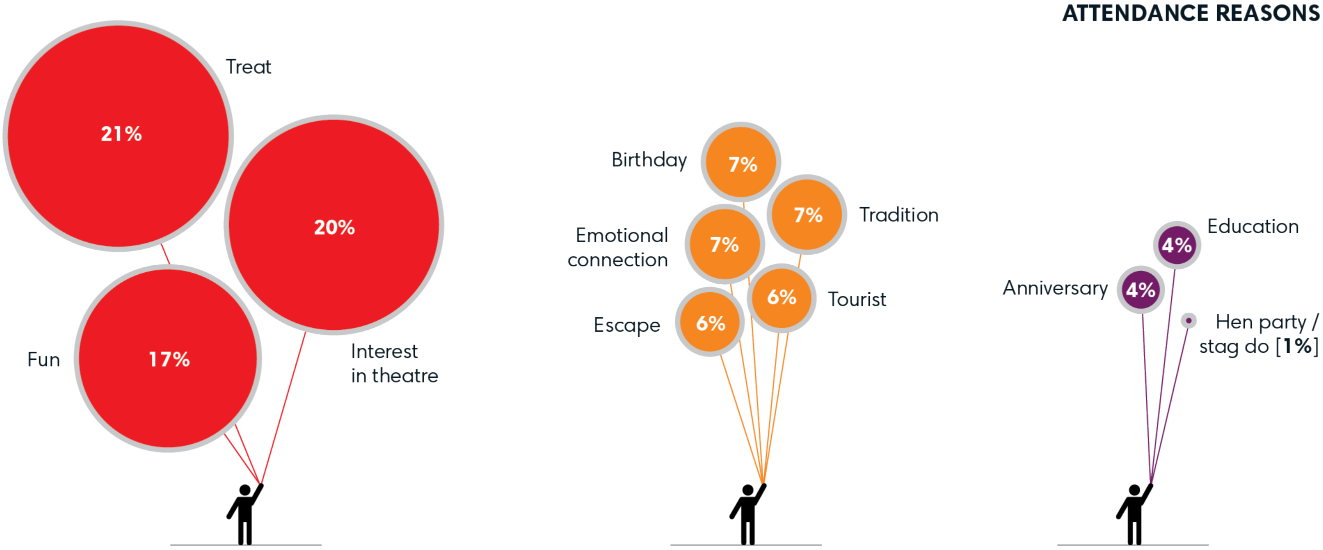
Future attendance

Two in three (66%) want to maintain or increase the number of musicals and plays they attend this year, primarily driven by London attendees, which would continue the upward trend in attendance of West End theatre.[1] Next year is also looking positive, with 61% aiming to go to the same amount or more musicals and plays in 2014. Around half of theatre attendees would like to maintain or increase the number of opera and dance performances they go to this year and next.

Reasons for attendance

Most theatregoers primarily attend the theatre as a treat (21%) or because of their interest in theatre (20%). Of those attending for a treat, 52% attended two or more times in the past year, though attendees aged 65 and over were most likely to choose this as their primary reason for attendance. A further 17% went primarily for fun and 13% for a special occasion, such as a birthday or anniversary.

ATTENDANCE REASONS



1. The Stage, The West End officially survives the Olympics – and comes out stronger than ever: http://www.thestage.co.uk/columns/shenton/2013/01/the-west-end-officially-survives-the-olympics-and-comes-out-stronger-than-ever/

Specific performances

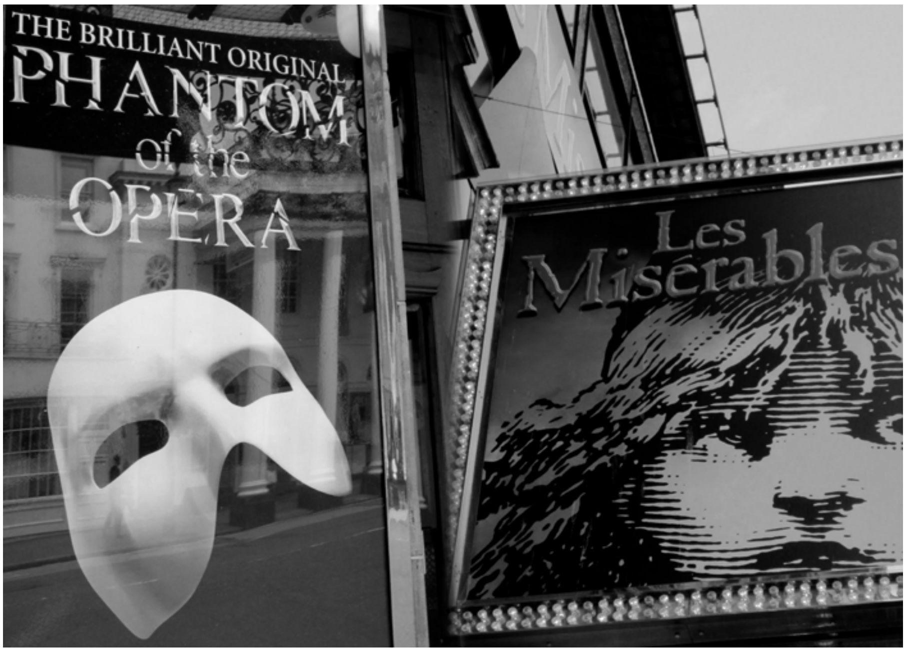
More than half (55%) would see the same performance more than once.

Long-standing musicals are highly popular amongst theatre attendees, with near universal awareness for the Phantom of the Opera (94%), Les Misérables (93%) and the Lion King (92%). They also boast the highest attendance and conversion rates from awareness to attendance.

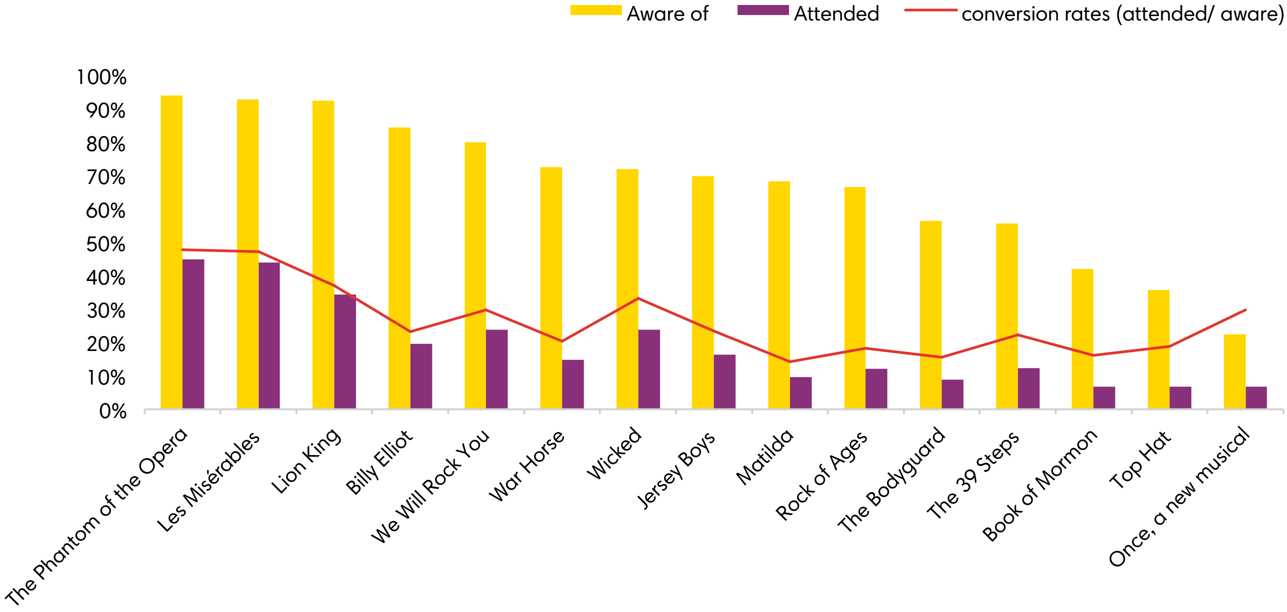
Though there is a strong correlation between awareness and attendance, some notable exceptions such as Wicked and Once have high conversion rates even though their awareness rates are much lower than the most popular West-End shows.

Theatre experience:

"LION KING! I COULD SEE IT A MILLION TIMES AND THEN SOME MORE..."



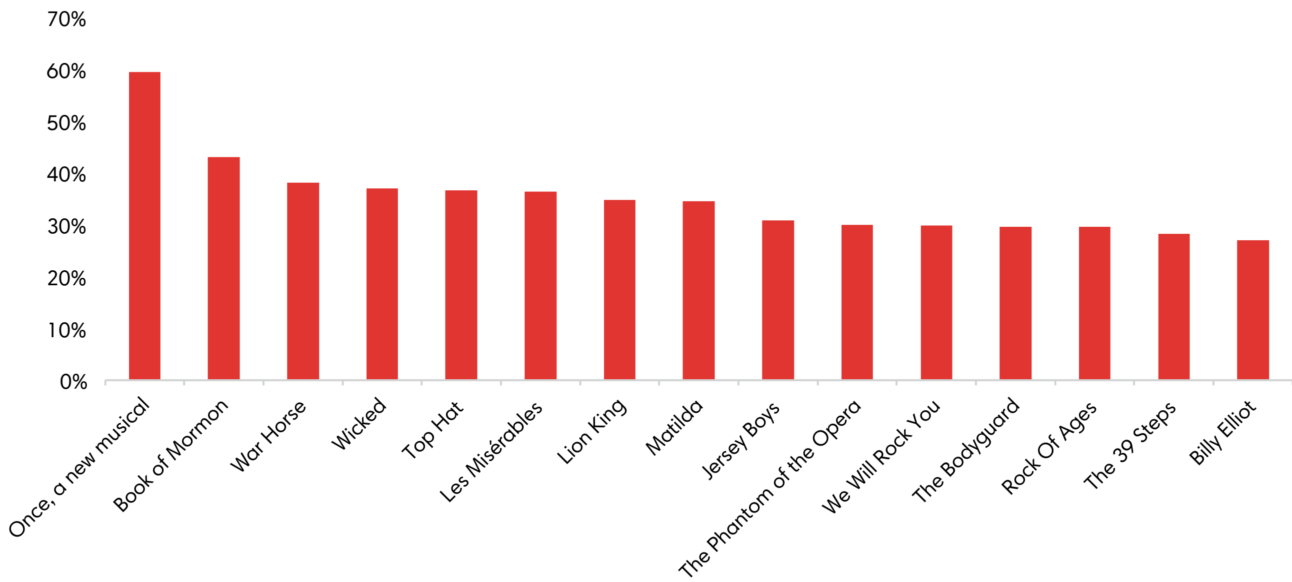
AWARENESS / ATTENDANCE OF CURRENT SHOWS



Similarly, Once has the biggest proportion of those aware of the show planning to attend in the future (59%), followed by Book of Mormon (43%) and War Horse (58%), all of which are relatively new performances. Though this could also be related to the weak inverse correlation between past and future attendance (i.e. if someone has already been to a show they are slightly less likely to attend again in the future), it still exemplifies that even shows that have not been around for as long can raise an interest.

Given that a large proportion of theatregoers have already been to a lot of the big shows that have been running for many years, people would rather go to a new performance with limited run (36%) or a relatively established performance (43%) over a long running performance that's been going for over 2 years, suggesting that **they are more experimental in nature than we might assume**.

PLANNING TO GO
OF THOSE AWARE



FAVOURITE SHOW

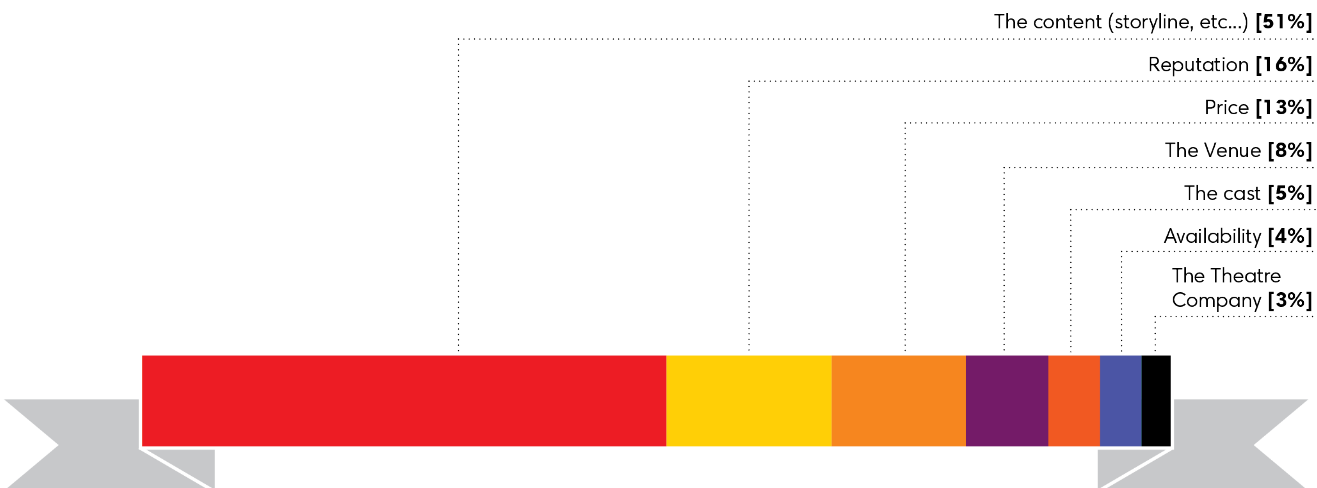
Even so, the top three preferred shows reflect the top three attended shows, exemplifying the appeal of wide reaching and established titles, with Les Misérables topping the list of favourite shows. The Phantom of the Opera is runner up to 'people's choice', followed by The Lion King, which completes the top three list of awareness and attendance, albeit in a slightly different order.

Attendance criteria

As a genre, **comedy is the most appealing to theatregoers** (42%) and even more so amongst attendees with maximum qualifications of GCSEs or equivalent (49%). Drama is preferred by 30% of overall attendees, though it's the most popular genre amongst theatregoers with a post-graduate degree (35%). Traditional theatre was more popular than contemporary (18% vs. 11% respectively).

The content and storyline are the most important criteria for choosing to attend a performance for more than half (51%) of theatre attendees. Reputation and price of the performance are the second and third most important consideration choices (16% and 13% respectively).

PRIMARY CRITERION FOR CHOOSING TO ATTEND A PERFORMANCE



Logistics

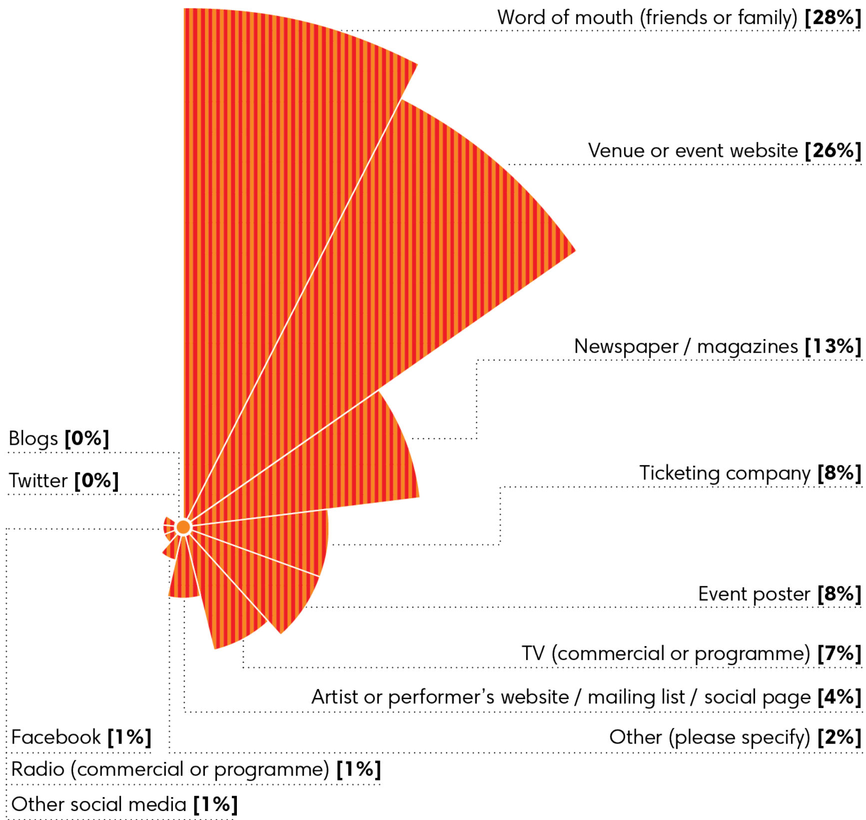
Theatre experience:

"WENT TO SEE A PRODUCTION IN TWO LONG PARTS, MADE A FULL DAY EXPERIENCE OUT OF IT."

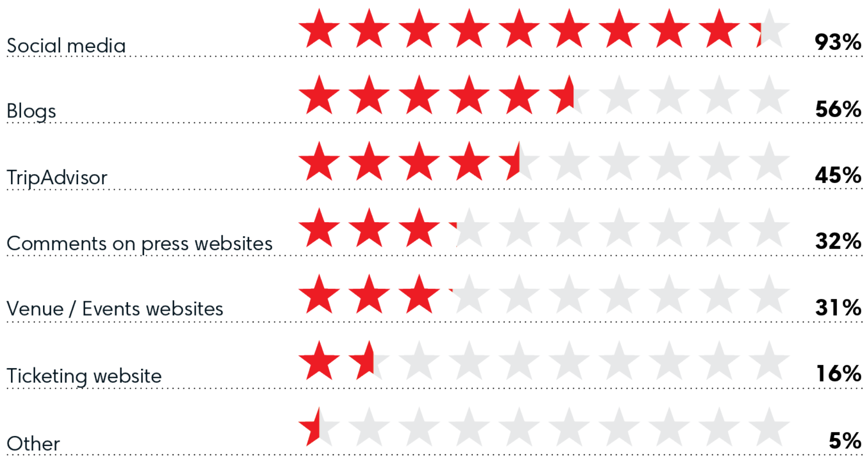
Information gathering & sharing

More than one in four theatregoers find out about performances they want to attend either through word of mouth (from friends or family) or directly through the event venue or website are (28% and 26% respectively). However**, a combination of traditional media including TV and Radio, informs close to one in three theatregoers (29%)**, though driven primarily through newspapers and magazines. Reliance on these sources of information is higher amongst theatregoers than other event attendees, particularly festival-goers, who are happier to use social media, which in turn accounts for a small proportion of information dissemination (3%) around theatre.

SOURCE OF EVENT INFORMATION



REVIEW PLATFORMS
OF THOSE WRITING REVIEWS



Around two in five think of reviews and articles as important in encouraging them to attend the theatre (43% and 39% respectively). Furthermore, one in five write reviews about shows they have seen, 17% of which do so on a regular basis and most often on social media.

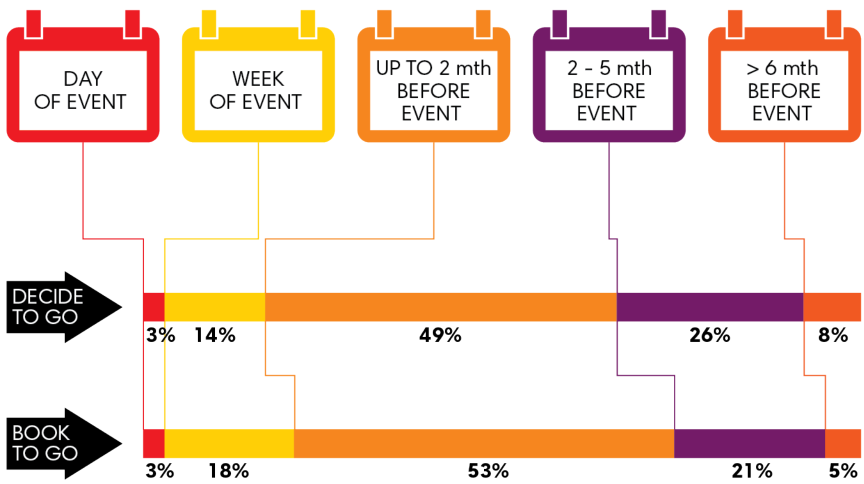
Planning and booking

Interestingly, the majority (83%) of theatregoers seem to plan their theatre attendance two or more months in advance of the actual performance. **Spontaneity amongst theatre attendance is quite rare**, with 14% deciding to attend just a week in advance and 3% leaving it till the day of the performance itself – visitors from US and Australia are more likely to decide they will be attending a show on the day of the performance. Furthermore, the time lag between deciding to attend and booking the tickets is not that large, with the **majority of attendees booking their tickets at the time or soon after they decide to attend**.

Only 4% wait until the last week to book, though they have decided to attend up to two months in advance.

Approximately half of theatre attendees usually purchase two tickets (one for themselves and one for a guest), and 28% purchase between 3-5 tickets. Approximately one in eight (13%) buy a ticket only for themselves and 6% usually get given their ticket (so don't have to book themselves).

PLANNING & BOOKING



Theatre experience:

"BEING SO ENTHUSED BY THE JERSEY BOYS ON THE WEST-END THAT I IMMEDIATELY BOUGHT THE CD"

Ticket prices

The majority (45%) of attendees pay between £30 and £59 for their theatre tickets and wouldn't want to pay more than that, though a small number of attendees would be willing to increase their spending on tickets to around £100 or £200, "if it's good then it's worth the money". This also aligns with the increase of top seat prices in 2013, where the most expensive seat for a West End show was £127 and £225 for subsidised sector.[2] The most popular shows can also sell for more than twice their face value on secondary sites, with the most expensive West End show going for £313 (sold in May 2013) and a subsidised opera performance, also in London, going for £488 (sold in February 2013).[3] It is therefore not surprising that attendees in London are more likely to pay at the higher end of the scale than in other regions, probably reflecting both supply (more expensive shows) and demand (more affluent demographics).

In terms of booking considerations, **attendees are polarised between prioritising good seats over affordable prices** (44% each) with only 12% just interested in any seat available.

Close to half (49%) of theatre attendees book their tickets through a primary ticketing company, which increases to 61% amongst 20-24 year olds. 23% buy their tickets directly through the venue, though the box office is the most common way of purchasing tickets for the majority (41%) of 65+ year olds. A further 16% of overall attendees use online deal sites, though these are more popular amongst 25-34 year olds, who are also more likely to use secondary (user-to-user) sites than other age-groups.

Most people's primary mode of transport for getting to the theatre is by car (58%), followed by train (17%) and the underground (12%). London residents are more likely to take the underground (38%), and least likely to share a car or walk.

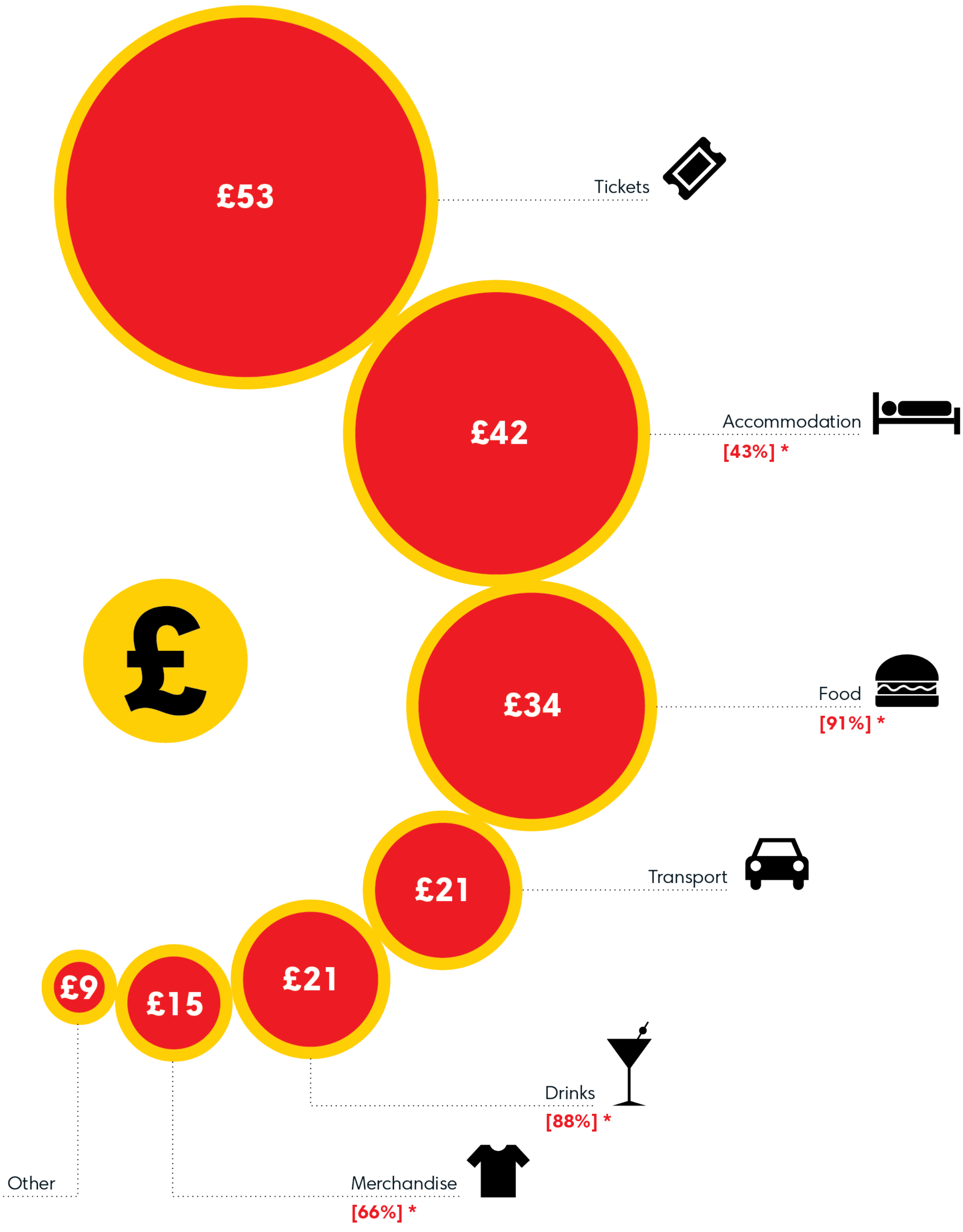
Added costs

People are **happy to travel far in order to see a show**, with more than two in five (44%) willing to travel for up to one hour and another that many willing to travel over an hour to get to their theatre destination. Over two in five (43%) have also stayed overnight before or after attending the theatre, most of which (36%) pay between £60 and £99 per person for accommodation. Nearly all attendees (91%) usually combine dinner and a show, with more than half of them (55%) paying £29 or under per person. And close to nine in ten (88%) will also have a drink or two, which will add up to another £21 on average. Two in three (66%) buy some sort of merchandise, such as programmes, CD or T-shirt, most of which (49%) spend under £10 for their purchases.

2. The Stage, Top West End seats up to more than £80, cheap seats fall to £21: http://www.thestage.co.uk/news/2013/04/top-west-end-seats-up-to-more-than-80-cheap-seats-fall-to-21/

3. GET ME IN! – inventory, July 2013

AVERAGE SPEND BREAKDOWN PER PERSON
- WHERE APPLICABLE



* percentage of attendees spending

The changing nature of theatre

Theatre experience:

"PUNCHDRUNK – FAUSTUS. EPIC"

Modernising theatre

As the theatre industry tries to modernise (in terms of venues, the artform itself and its reach), we try to explore to what extent these efforts are being embraced by the public and which of these are likely to be lasting changes or fleeting trends.

Restoration levy

Some of these come from necessity, such as the restoration levy, which is an extra cost added to the price of some tickets that goes towards ensuring theatre venues (particularly the older ones) are maintained for generations to come. Theatre attendees are polarised on their views around the levy, with equal amounts for (30%) and against (31%) the levy being included in the price and the majority (39%) indifferent – regular theatregoers (who attended the theatre more than five times last year) are more likely to be happy for the levy to be included than more transient attendees.

Given the choice, more people (58%) would like the levy to be optional and either way, more than two in three (68%) would like more clarity on what the levy covers.

Interactive theatre

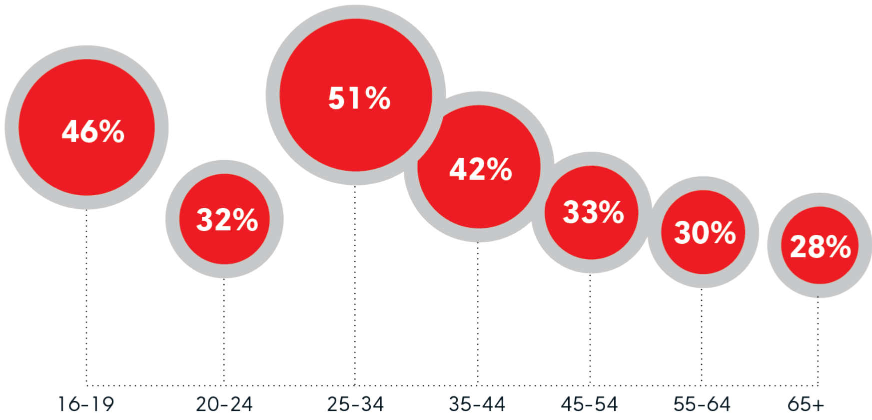
Some of the developments around theatre are related to the artform itself and the way it engages with its audience. Interactive theatre, a more participatory and explorative type of theatre, characterised by an active, physical relationship between audience and production, often incorporates a site-specific venue around which the audience is free to roam. Given that it is still often considered on the fringe of theatre, **some theatregoers (29%) feel interactive theatre is hard to follow** although it seems to be catching on quite quickly, with close to one in four (39%) thinking it's great. Age seems to be a defining factor in opinions around interactive theatre, with popularity peaking amongst 25-34 year olds (51%) and decreasing with age thereafter.

However, there is no consensus on whether more theatre performances should aim to be interactive, though there is strong agreement amongst the majority of attendees (67%) that they prefer to be spectators rather than participants.

Streamed theatre

The last type of trend within theatres is trying to extend reach and distribution (also one of the Arts Council's strategic objectives), which is less controversial and generally seen as a good thing, both for people within and outside the industry. With that in mind, it should not come as a surprise that streamed theatre (viewing live or recorded theatre performances via the cinema, TV, outdoor screens or an official online channel), is seen as a great opportunity to reach a wider audience by the majority (57%) of theatre attendees. At the same time however, the same number of people (57%) believe that by **excluding the live/face-to-face element of theatre it detracts from the experience**, which in turn suggests that it is a good idea to reach a wider, incremental audience, but that avid theatregoers would not enjoy the experience as much. In a similar vein, close to half (45%) of theatre attendees believe that people who pay good money to see a show no longer have exclusivity over the content, which might explain why though in theory streamed theatre is a good idea, in practice less than two in five (39%) think that more performances should be streamed.

INTERACTIVE THEATRE IS GREAT!



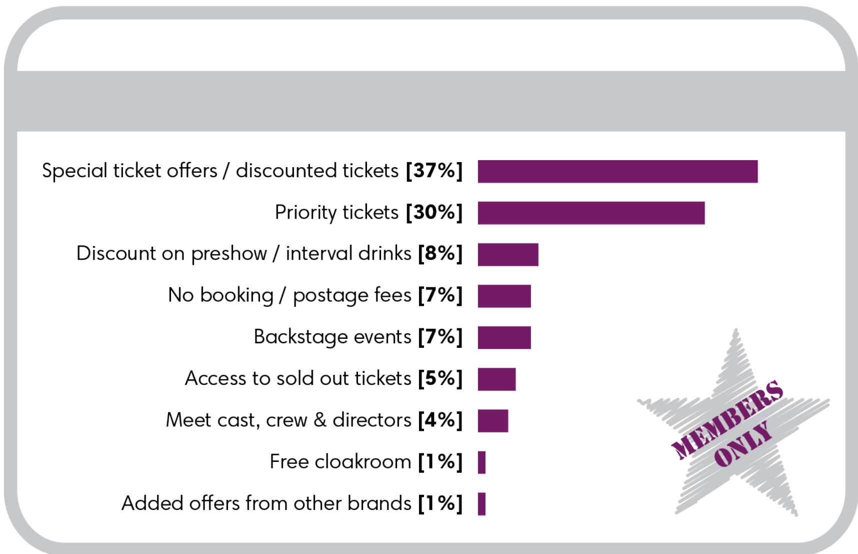
Commercialising theatre

Membership and access schemes

Of attendees from the UK, 4% have a membership with a theatre company or group of theatres, the majority of which have with the Ambassador Theatre Group (ATG), Royal Opera House and National Theatre. **Special ticket offers and discounts are the main reasons for having a theatre membership**. Though a smaller proportion of theatre attendees are interested in the more exclusive offers such as backstage events (7%) and meeting of cast, crew and directors (4%), these can be lucrative income sources, as those interested are willing to pay premium prices.[4]

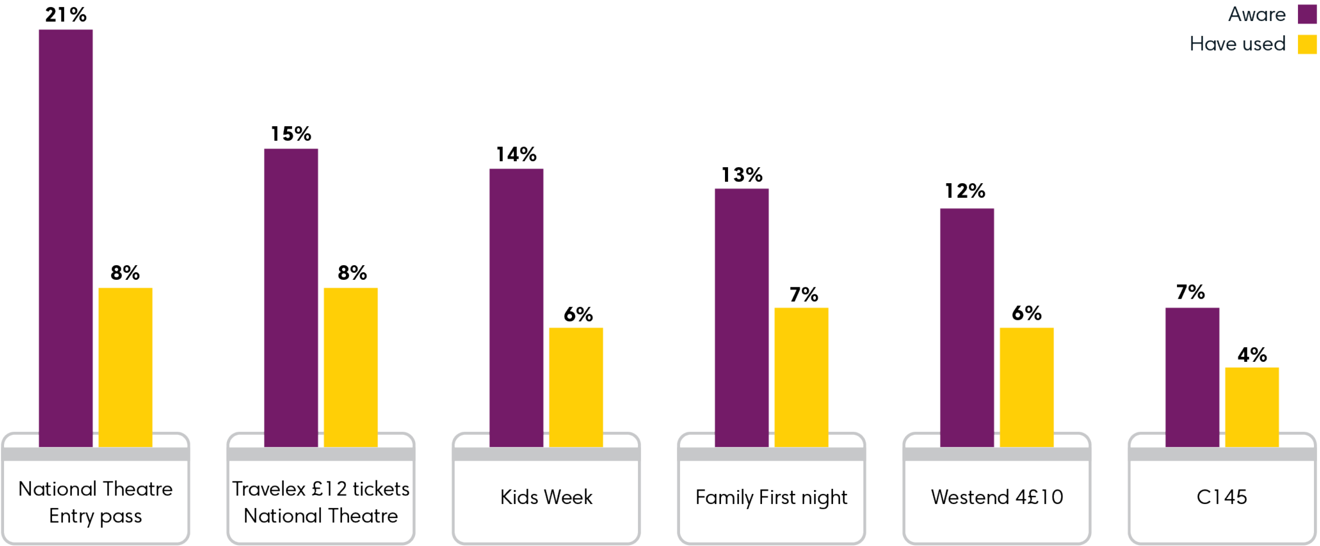
Aside from streamed theatre and theatre membership, there are several schemes that try to encourage greater attendance and across wider demographics.

MAIN REASON FOR MEMBERSHIP
AMONGST MEMBERSHIP HOLDERS



4. BBC Radio 4, Premium Theatre: http://www.bbc.co.uk/programmes/p01dr0zk

AWARENESS / USE OF SPECIAL ACCESS SCHEMES



Theatre experience:

"SAW 'WAITING FOR GODOT' STARRING SIR PATRICK STEWART AND IAN MCKELLAN… AMAZING."

The National Theatre Entry Pass has the highest awareness rates, though uptake was the same as the Travelex £12 tickets, for which awareness was significantly higher in London. Awareness for Kids Week was also significantly higher amongst parents with children between six to ten years old (35%), who were more than three times as likely to have used the scheme than average theatregoers.

Sponsorship

One in six (16%) have noticed sponsors at theatre performances and/ or venues – the majority of them don't remember the sponsors specifically, which explains why **more than half (54%) say they rarely notice when an event is sponsored**. Some notable exceptions however, Travelex and Coutts, both long-term sponsors of the National Theatre in London, were the two sponsor brands with the highest recall. Even so, people generally feel comfortable about the presence of sponsors within the theatre sector, with close to four in five (78%) happy for events to have sponsors if they keep the prices down and more than one in five (22%) saying they are more likely to buy from a sponsoring brand because of their presence/ involvement at the theatre. Similarly, close to two in five (38%) feel positive towards brands offering their customers priority or special access to theatre productions, though only 3% have ever taken advantage of this kind of offer.

Conclusion

Theatre in the UK is growing, evolving and diverse – demand is increasing as the industry is finding new ways to attract and engage wider audiences, whilst also looking for new revenue streams.

Theatre continues to be an important part in people's lives, driven primarily by its immersive and engaging nature. Though the majority of attendees are between 24 to 44 years old, 16-19 year olds are significantly more likely to attend the theatre than any other age group.

Attendance is strong, particularly in London, and the majority of attendees are planning to either maintain or increase their theatre going this year and the next, despite an increase in ticket prices for coveted seats. Even so, price is the primary barrier to entry for people who already attend the theatre, suggesting that they would likely go to more performances if tickets were more affordable.

Attendees rely primarily on trusted sources such as friends and family (word of mouth) and directly from the venue or events websites to find out about shows they want to go to. However, reviews are considered more important than articles in deciding which performances to see and people are also keen to make their own voices heard and spread the word through social media and other platforms.

Technology is also present throughout the theatre experience, with attendees sometimes using their phones and social media during a performance, even though the majority of attendees think it is unacceptable to do so.

Whilst public funding is decreasing, theatres are looking to other sources such as membership and sponsorship to diversify their income sources and reach wider audiences. At the same time, audiences lack awareness of and understanding around the difference between publicly funded theatre, versus commercial theatre.

The growing demand for theatre, coupled by the younger audiences attending, present several opportunities for the industry:

- Encourage two-way engagement with audience both before and after the performance, using social media and tying in with word of mouth – harness the emotional connection of the theatre to get attendees to also 'spread the word', given how much they already share
- Adopt a more targeted approach – social media won't work across all performances/ audience, so don't alienate more traditional theatregoers. Understanding audiences well and capitalising on overlap with and interest in other events, such as arts and cinema, can also help with cross-marketing and publicity
- Widen awareness and adoption of membership and patronage schemes (reach and depth) and build strong and long-term relationships with sponsors, which can be well received by attendees

WHAT IS YOUR MOST MEMORABLE THEATRE EXPERIENCE?

“I WENT WITH MY BOYFRIEND IT WAS HIS PRESENT FOR ME AFTER WE GRADUATED FROM UNI, WELL THE SHOW WAS FANTASTIC I HAD A GREAT TIME AND THE BEST PART WAS...HE PROPOSED! ”

“I WENT TO SEE **MUCH ADO ABOUT NOTHING** AT THE GLOBE WITH MY MOTHER AND SISTER FOR OUR BIRTHDAY (WHICH WE SHARE). IT WAS AN INCREDIBLE EXPERIENCE AND ONE OF THE BEST THEATRE PRODUCTIONS I'VE EVER SEEN ”

“WHEN I AND MY GIRLFRIEND - NOW MY WIFE - SAW THE FIRST SHOWING OF **WEST SIDE STORY** AT HER MAJESTY'S THEATRE. MY GIRLFRIEND HAD COME DOWN TO LONDON FROM SUNDERLAND TO MEET ME. THIS WAS OUR FIRST THEATRE EXPERIENCE TOGETHER ”

“TAKING A FRIEND TO LONDON TO SEE **MAMMA MIA** – HE'D NEVER BEEN TO LONDON OR THE THEATRE AND WAS VERY NERVOUS ABOUT GOING BUT SOON GOT INTO THE SHOW AND LOVED IT SO MUCH HE'S GONE EVERY YEAR SINCE ”

“SEEING DAVE ALLEN AT LEEDS GRAND THEATRE WAS A MAGICAL AND SERIOUSLY FUNNY EXPERIENCE!!! WHEN A YOUNG(ISH) COUPLE STOOD UP AND STARTED TO LEAVE LESS THAN HALF THE WAY THROUGH THE PERFORMANCE, HE ASKED THEM WHY THEY WERE LEAVING SO EARLY – THEY TOLD HIM THAT THEIR LAST BUS TO HARROGATE LEFT IN 10MINS AND BECAUSE THE SHOW STARTED LATE, THEY HAD TO GO OR THEY WOULDN'T BE ABLE TO GET HOME. HE THEN TOLD THEM TO SIT DOWN AND ENJOY THE REST OF THE SHOW, AND THAT IT WAS HIS FAULT THAT THE SHOW STARTED LATE, AND BY WAY OF AN APOLOGY, HE WOULD GLADLY PAY FOR A TAXI HOME FOR THE YOUNG COUPLE. NEEDLESS TO SAY HE RECEIVED A HEARTY ROUND OF APPLAUSE FROM ALL WHO WERE IN ATTENDANCE ”

Appendix

Bibliography

- The Stage, The West End officially survives the Olympics – and comes out stronger than ever: http://www.thestage.co.uk/columns/shenton/2013/01/the-west-end-officially-survives-the-olympics-and-comes-out-stronger-than-ever/
- The Stage, Top West End seats up to more than £80, cheap seats fall to £21: http://www.thestage.co.uk/news/2013/04/top-west-end-seats-up-to-more-than-80-cheap-seats-fall-to-21/
- Get Me In – inventory, July 2013
- BBC Radio 4, Premium Theatre: http://www.bbc.co.uk/programmes/p01dr0zk

Methodology

All the research we're referring to, unless explicitly referenced otherwise, comes from primary research conducted online by Ticketmaster UK.

We used Ticketmaster's Live Analytics ticketing data and the SOLT Theatres report as a guide for our sampling and to get a sense of where theatre attendees in the UK are coming from.

We then partnered with sampling agency Research Now to recreate a representative sample of theatre attendees in the UK, with attendance to at least one theatre event in the past 3 years as our screener. We focused primarily on UK attendees, but complemented this with attendees from abroad:

- 1006 theatre attendees from the UK (representative sample)
- 200 attendees from the US (indicative sample)
- 100 from Australia (indicative sample)
- 100 from Ireland (indicative sample)
- 50 from Germany (indicative sample)

Respondents who were screened out (362) were treated as non-attendees and were routed to questions around barriers to entry.

Response numbers above exclude flatliners, rogue respondents and partial completes.

For the purposes of this research, we defined 'theatre' as plays, musical, opera, dance and other performances excluding comedy and music.

The fieldwork was conducted between 3 May 2013 and 23 May 2013.

Please note that as the research was conducted online, some of the comparisons between online and offline behaviour may have a skew toward online.

Where relevant and referenced within the analysis itself we have complemented and contextualised our research with external sources.

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