

The Show Must Go On / Off line

The Czech Republic
Thursday 28th January 2021

Jonathan Goodacre, Senior Consultant
The Audience Agency



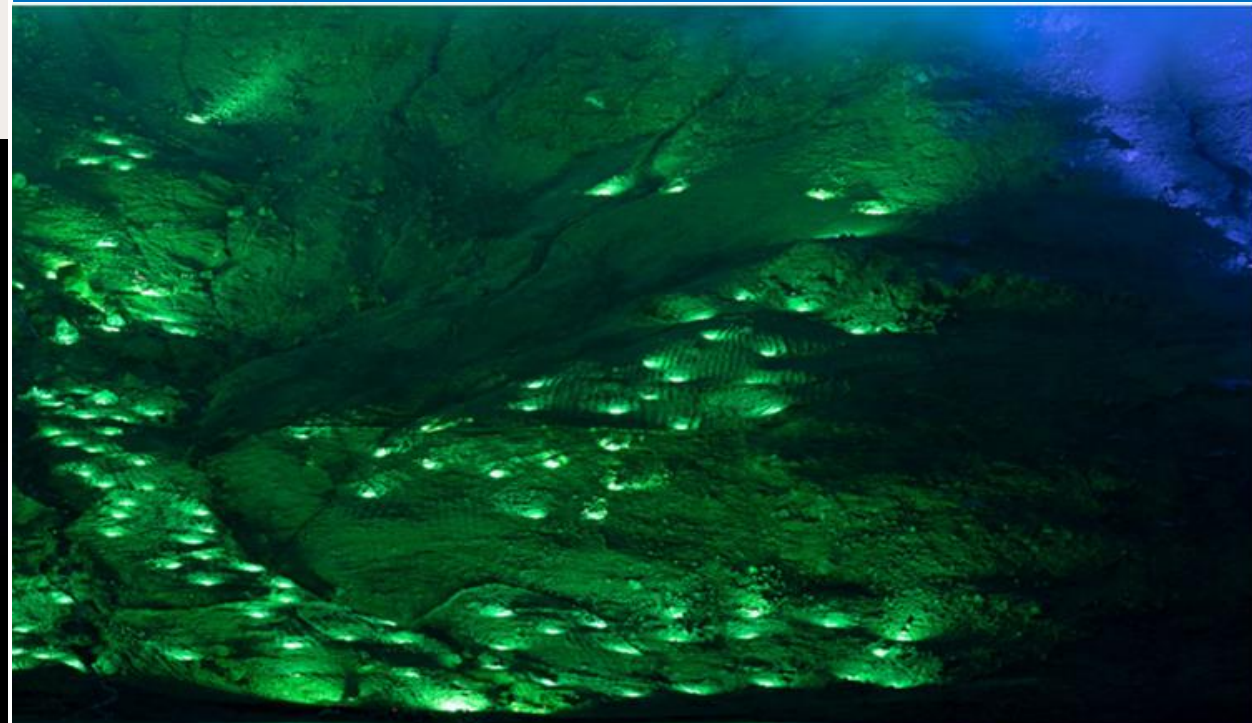
I/C Announces Plans To Close

[Read more here.](#)



The Show Must Go On ...

Yvonne Arnaud Theatre, UK.
Photo Craig Fuller



Savage Beauty, Kari Lola,
Galway, Ireland



Understanding the audience

This Covid-19 Pandemic crisis has reminded us that we cannot talk about culture without talking about the audience

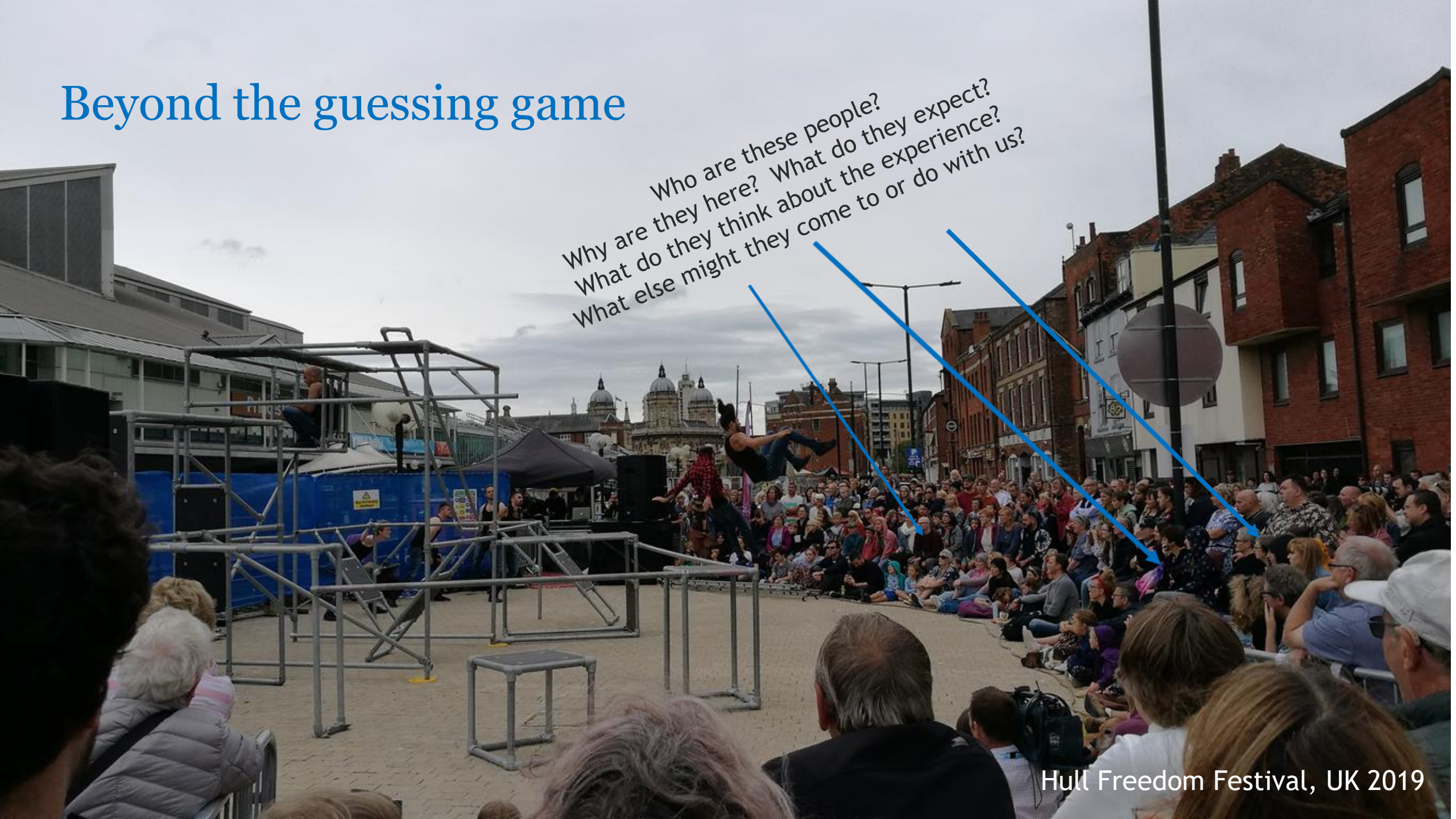


Sofia Opera and Ballet, Bulgaria



Beyond the guessing game

Who are these people?
Why are they here? What do they expect?
What else might they come to or do with us?



Audience Research – knowing instead of guessing



**ASSE
ASST**

**AUDIENCE
SEGMENTATION
SYSTEM IN
EUROPEAN
THEATRES**



Co-funded by the
Creative Europe Programme
of the European Union

Asset Project

Research into theatre audiences in Helsinki, Prague, Sofia, Vienna and Zagreb

20 theatres (4 theatres in each of 5 cities)

Training and workshops

Questionnaire based research

Audience development activity linked to European Theatre Night

Develop understanding of audiences in those cities

Segmentation

Evaluation and dissemination of outcomes



Survey methodology

Im Rahmen des von der Europäischen Union unterstützten Forschungsprojektes „ASSET“ nimmt das WERK X-Petersplatz an einer europaweiten Publikumsbefragung teil. Die Ergebnisse sollen dabei helfen, in Zukunft zielgerichteter auf die Wünsche des Theaterpublikums eingehen zu können.

Frühere Besuche

Haben Sie das WERK X-Petersplatz bereits einmal besucht??

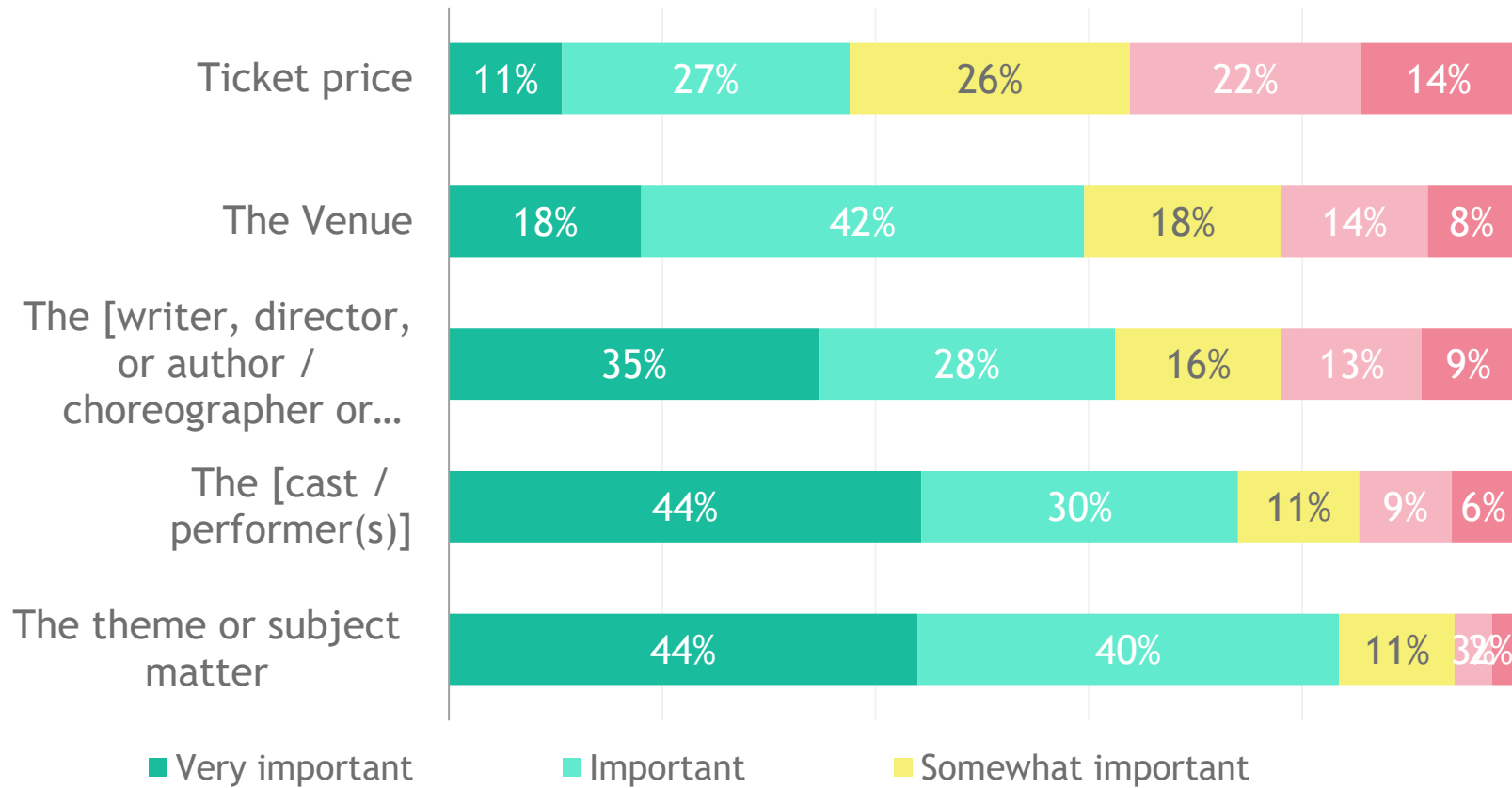
- | | |
|--|---|
| <input type="checkbox"/> Ja, in den letzten 12 Monaten | <input type="checkbox"/> Ja, vor drei bis fünf Jahren |
| <input type="checkbox"/> Ja, vor ein bis zwei Jahren | <input type="checkbox"/> Ja, vor mehr als fünf Jahren |
| <input type="checkbox"/> Ja, vor zwei bis drei Jahren | <input type="checkbox"/> Nein, das ist mein erster Besuch |

(Falls: Ja in den letzten 12 Monaten) Inklusiv heute: wie oft haben Sie das WERK X-Petersplatz in den letzten 12 Monaten besucht?

Der heutige Besuch

Durch welche der aufgezählten Punkte haben Sie von der heutigen Aufführung erfahren *(Alle zutreffenden ankreuzen)*

Decision-making (average)



Decision-making (scored)

	Average	Austria	Bulgaria	Croatia	Czechia	Finland
Ticket price	3.0	2.5	3.6	3.1	2.4	3.2
The venue	3.5	2.9	4.0	3.6	3.2	3.6
Writer, director, author/ Choreographer, composer/Company	3.7	3.2	4.7	3.8	2.9	3.7
Cast/performer(s)	4.0	3.3	4.7	4.2	3.6	4.0
Theme or subject matter	4.2	4.0	4.5	4.2	4.0	4.2

Beyond the 'average' audience member



Asset Segmentation

When it comes to [Artform] in general, where would you put yourself on the following scales? *(Please place an X where you would put yourself)*

I like to see something new 1 2 3 4 5 6 7 8 9 10 I like to see something classic

I like a lot of information beforehand 1 2 3 4 5 6 7 8 9 10 I prefer to take a chance

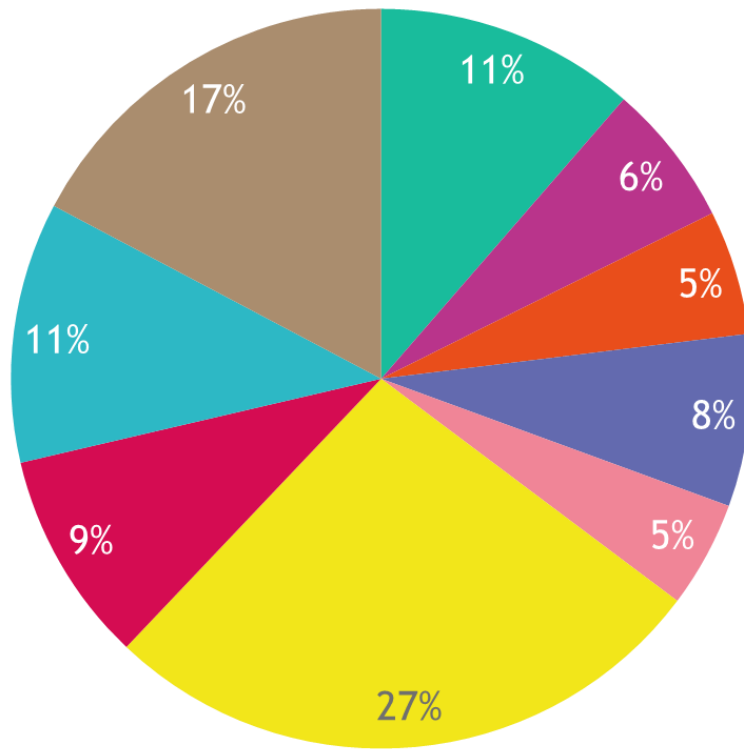
I'm excited to see well-known performers 1 2 3 4 5 6 7 8 9 10 I like to see new talent

By looking at peoples' responses to questions and combining these we can develop useful segments which the theatres can use in their work in a variety of ways – programming, communications, education etc.

Have you seen any of the following types of theatre performance in the last 12 months? *(Mark all that apply)*

- | | |
|--|--|
| <input type="checkbox"/> Children's/Family show | <input type="checkbox"/> Contemporary Circus |
| <input type="checkbox"/> Classical Play/Drama | <input type="checkbox"/> Classical Dance or Ballet |
| <input type="checkbox"/> Contemporary Play/Drama | <input type="checkbox"/> Contemporary Dance/Dance Theatre |
| <input type="checkbox"/> Experimental Theatre (incl. Physical Theatre) | <input type="checkbox"/> Musicals |
| <input type="checkbox"/> Interactive/Immersive Theatre | <input type="checkbox"/> Opera and Operetta |
| <input type="checkbox"/> Community/Amateur Theatre | <input type="checkbox"/> Comedy, cabaret, stand-up, talks and revues |
| <input type="checkbox"/> Puppetry/Object Theatre | |
| <input type="checkbox"/> Mime Theatre | <input type="checkbox"/> No, I haven't seen any of these |

Asset Segmentation

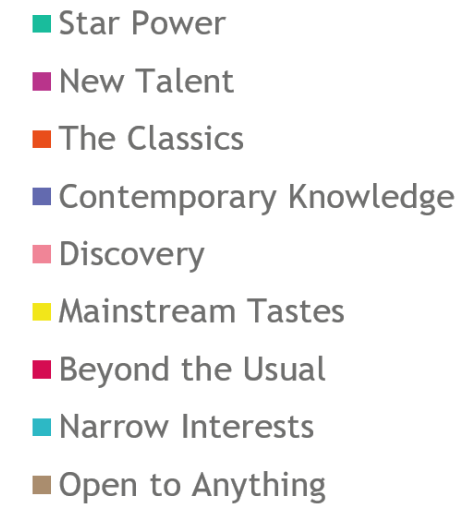
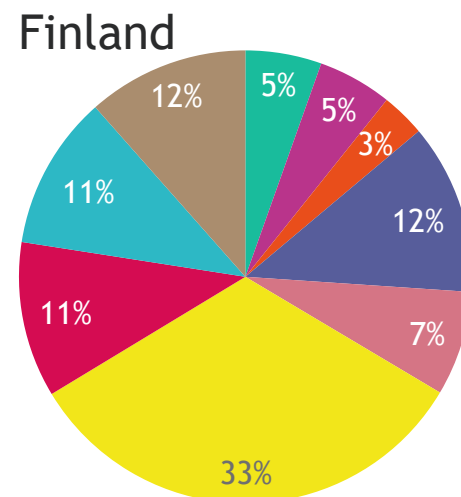
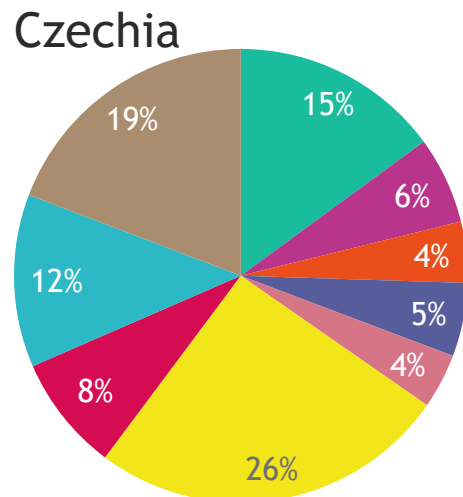
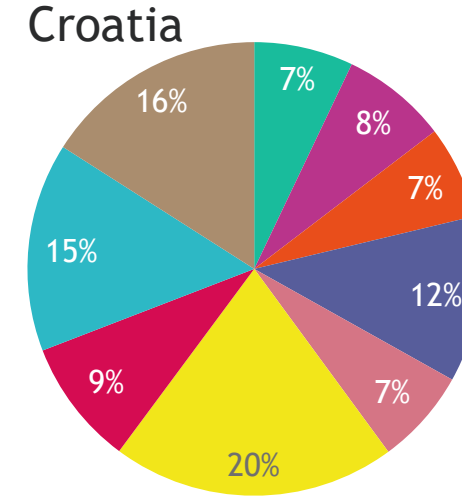
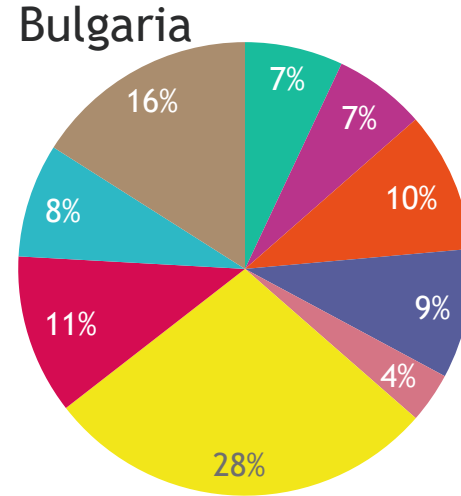
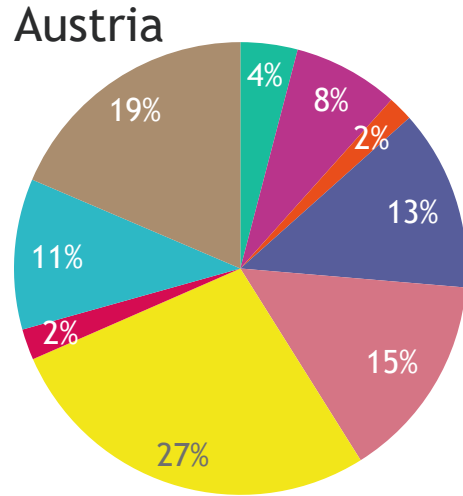


- Star Power
- New Talent
- The Classics
- Contemporary Knowledge
- Discovery
- Mainstream Tastes
- Beyond the Usual
- Narrow Interests
- Open to Anything

Segmentation can be based on various methodologies – it can be really simple or more complex

- In Asset it is based on attitudes to attending, frequency and range of artforms attended
- To this can be linked other secondary characteristics such as demographic background, geography etc.

Segment sizes by country



That was then, this is now



Image Credit: IG Kultur Austria

Thinking about the different groupings is also important in thinking about them under lockdown and beyond

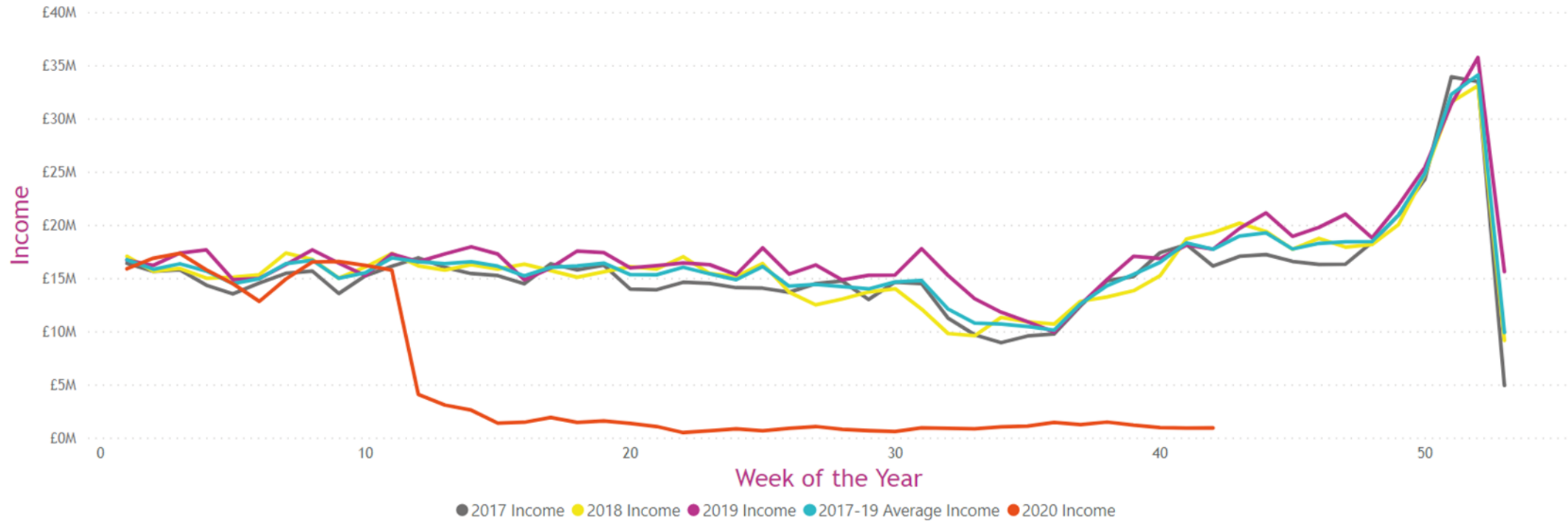
- Different people have had different experiences of Covid-19
- Different needs for culture
- The digital has brought some people but not others
- There are differing feelings about returning to a physical venue and prospects for the future

The audience under lockdown



Ticketing Income of UK Venues – Audience Finder Ghost Light Report

Ticketing Income by Week of the Year



£828.10M
2017 Income

£856.92M
2018 Income

£918.34M
2019 Income

£867.79M
2017-19 Average Income

£214.76M
2020 Income

£419.34M
2020 Shortfall

The audience, culture and lockdown – some thoughts



Alice: A Virtual Themepark: Creation Theatre, Big Telly Theatre Company and Charisma AI, UK

Research shows how vital culture is to our lives

- According to the Covid-19 Monitor in the UK, 57% of respondents said that taking part in organised cultural activities adds to their sense of wellbeing
- Many 'new audiences' engaging with digital content → 'barriers' to entry are reduced
- Variances between groups - eg. Younger people preferring 'digital first' content and older people preferring streamed versions (eg. of performances)

About the Participation Monitor

Background:

- This report is part of a [national research programme](#) led by the Centre for Cultural Value in collaboration with the Creative Industries Policy and Evidence Centre and The Audience Agency.
- The research is funded by UK Research and Innovation (UKRI) Covid-19 rolling call through the Arts and Humanities Research Council (AHRC).

CENTRE FOR CULTURAL VALUE


Creative Industries

Policy & Evidence Centre

Led by **nesta**



Arts and
Humanities
Research Council

 the audience agency

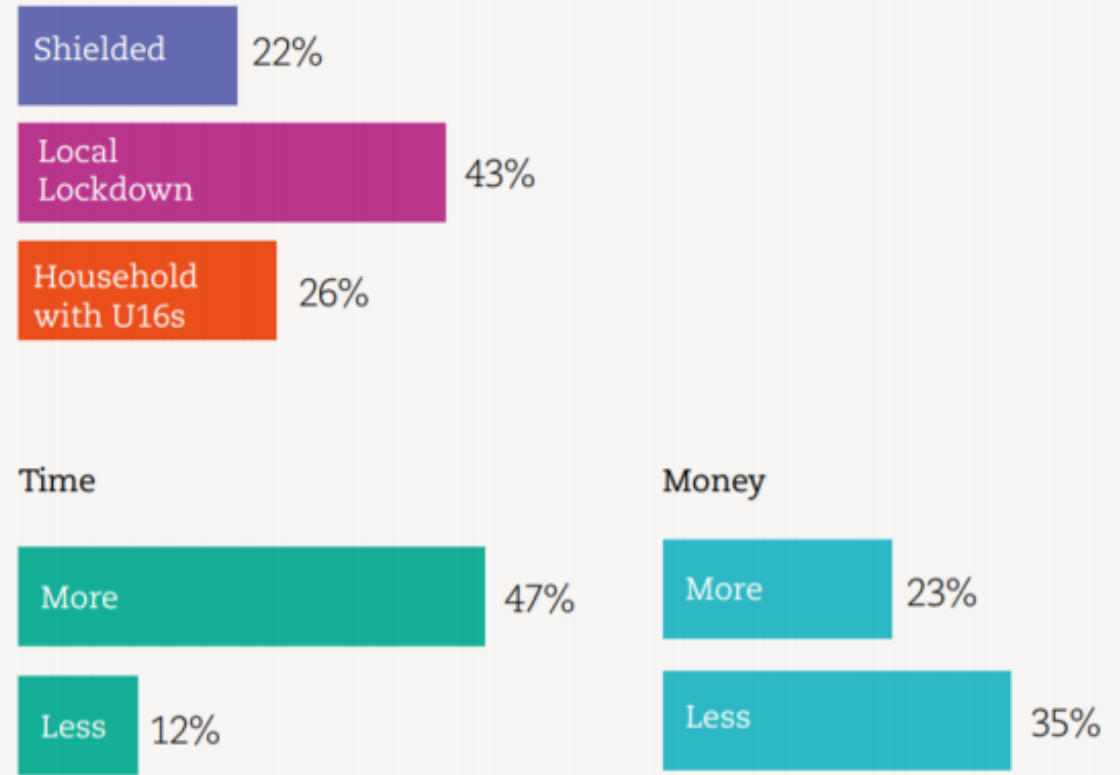
 the audience agency

Context: Covid Experiences

COVID-19 has had big impacts across the population, but importantly, these are very varied.

Nearly 80% have seen some change in the amount of time and/or money they have.

Many have shielded, had local lockdowns in addition to national ones, or have had under 16s in their household (which may include home schooling, for example).



Only c.1/5 same for both

For more contextual information, inc. differences by segment, see the overall summary report

Covid-19 Monitor

Obviously big changes - reductions usually - but not a complete absence

- Some activities increased!
- During the window of July-September some return to normal activities such as eating in a restaurant
- Holidays down in general but especially overseas

Did you do any of the following leisure activities IN PERSON:

		Since lockdown started in March 2020 until now	In the 12 months before lockdown (approx. April 2019 - March 2020)
Q6a	Watched live sport in person	513 (8%)	2036 (34%)
Q6b	Played sport (an individual or team game)	799 (13%)	1358 (22%)
Q6c	Eaten at a restaurant	3320 (55%)	3310 (55%)
Q6d	Visited a pub or bar	2612 (43%)	3207 (53%)
Q6e	Went on a walk or cycle for leisure	4563 (75%)	2370 (39%)
Q6f	Visited a gym for fitness/training	837 (14%)	1621 (27%)
Q6g	Fishing/angling	288 (5%)	468 (8%)
Q6h	Gardening	3766 (62%)	2078 (34%)
Q6i	DIY	3374 (56%)	2284 (38%)
Q6j	Had a holiday in the UK	1646 (27%)	3079 (51%)
Q6k	Had a holiday overseas	529 (9%)	3214 (53%)

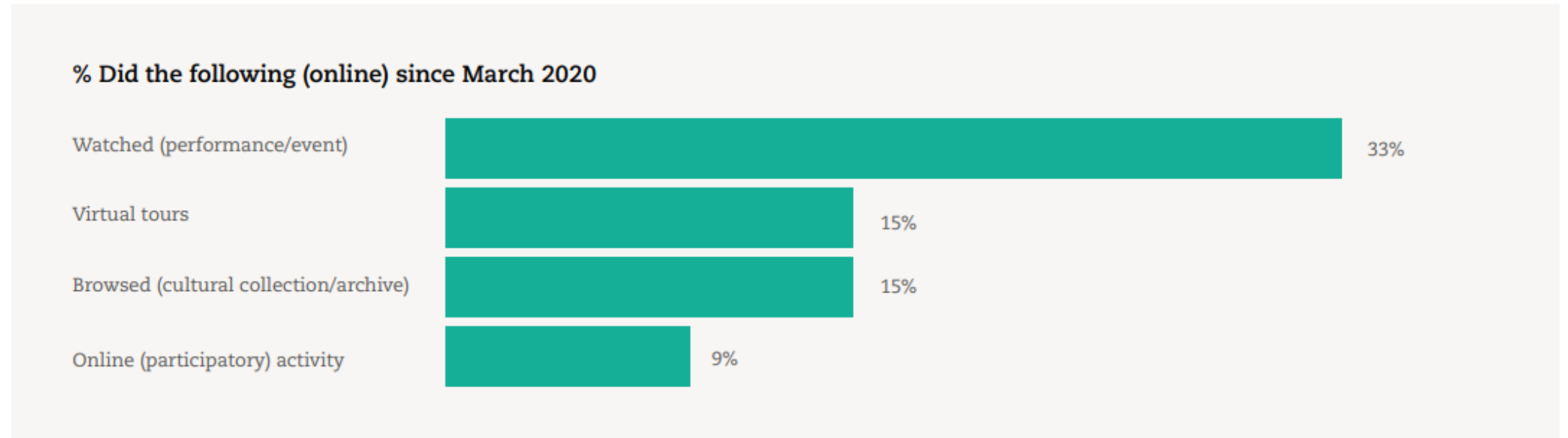
Covid-19 Monitor

arts activity

Were you an audience member at any of the following IN PERSON:

		Since lockdown started in March 2020 until now	In the 12 months before lockdown (approx. April 2019 - March 2020)	In the 10 years before April 2019	I haven't done this in the last 10 years
Q6l	Film at a cinema or other venue	637 (11%)	3692 (61%)	2271 (38%)	976 (16%)
Q6m	Exhibition or collection of art (including craft and design, fine arts, sculpture, photography, video or electronic art)	379 (6%)	2248 (37%)	2307 (38%)	2082 (34%)
Q6n	Event connected with books or writing (including readings and literary festivals)	243 (4%)	1002 (17%)	1333 (22%)	3805 (63%)
Q6o	Outdoor festival, carnival or street arts (in everyday surroundings)	187 (3%)	1946 (32%)	2145 (35%)	2491 (41%)
Q6p	Play/drama/musical	244 (4%)	2247 (37%)	2392 (40%)	2069 (34%)
Q6q	Children/family arts event including pantomime	206 (3%)	1644 (27%)	2020 (33%)	2748 (45%)
Q6r	Opera/ballet/classical music concert	175 (3%)	1098 (18%)	1501 (25%)	3657 (60%)
Q6s	Contemporary dance	130 (2%)	568 (9%)	903 (15%)	4599 (76%)
Q6t	Live music gig - Pop, world, jazz, recent bands, tribute bands	178 (3%)	1891 (31%)	2169 (36%)	2555 (42%)
Q6u	Other live entertainment (including comedy, cabaret)	167 (3%)	1600 (26%)	2064 (34%)	2808 (46%)
Q6v	Other arts event	161 (3%)	1200 (20%)	1645 (27%)	3472 (57%)

Digital engagement during lockdown



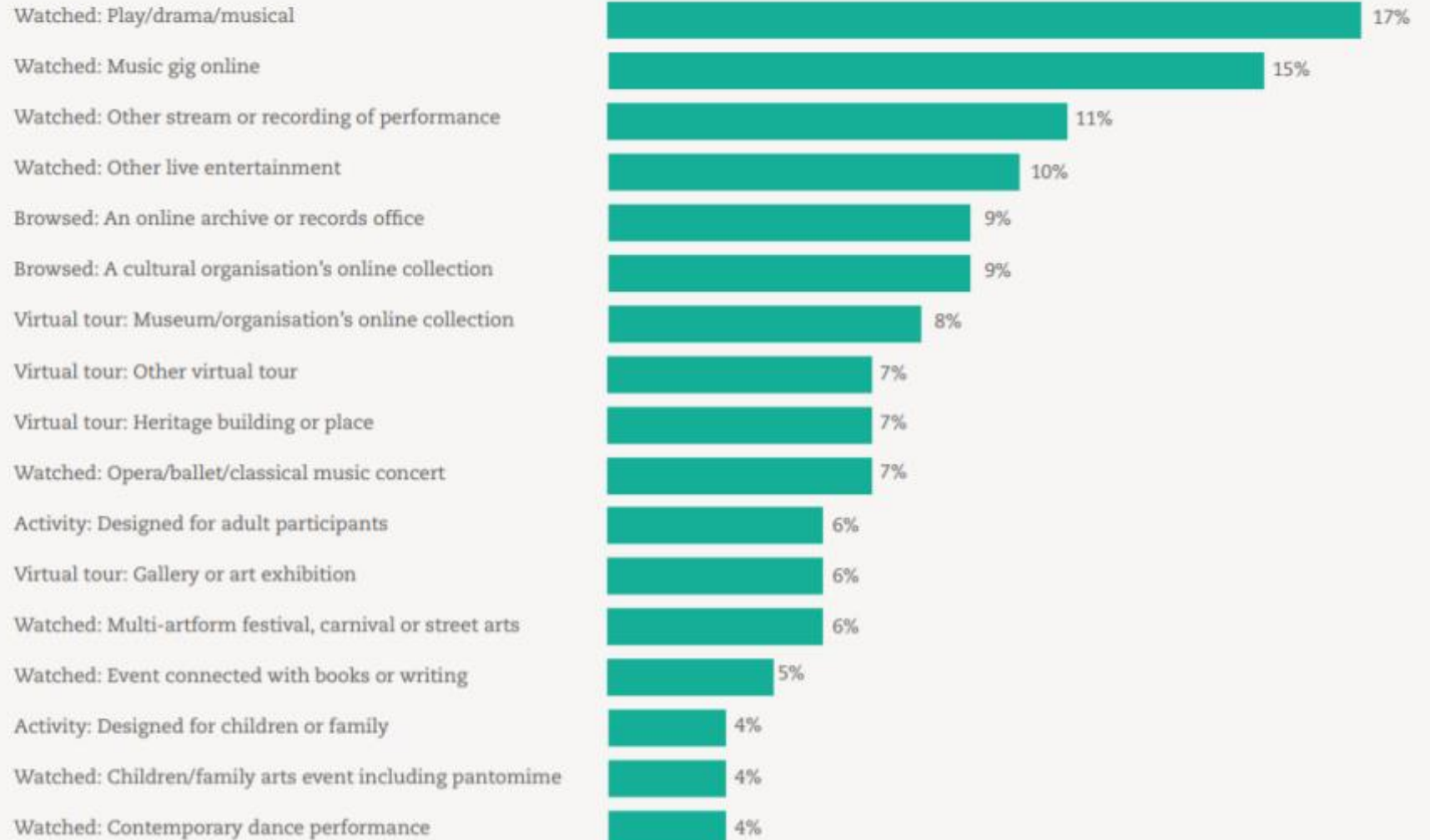
Digital Engagement

Types have varied, but the **most popular** activities are:

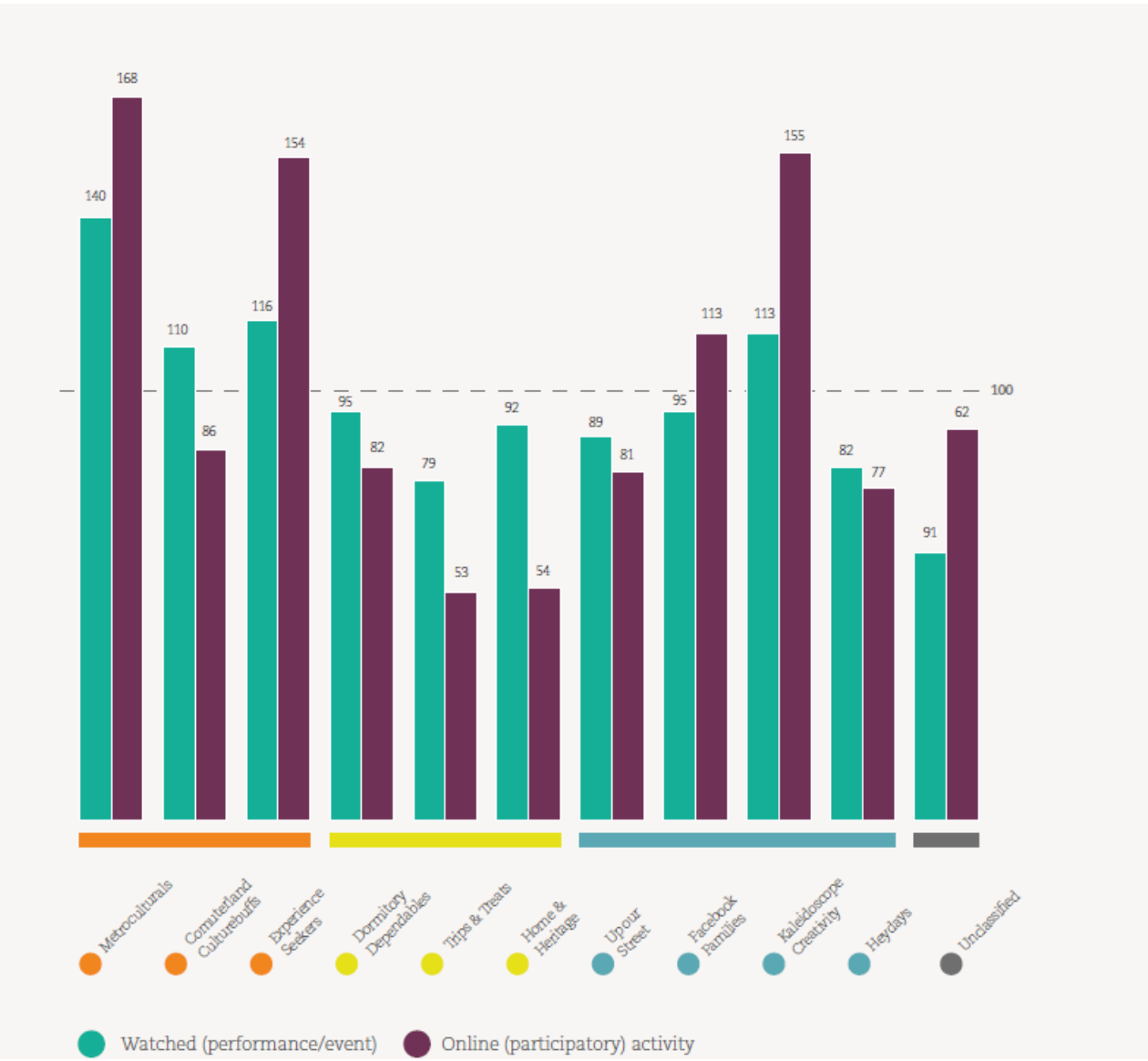
Watch play/drama /musical (17%)

Watch music (15%)

Most Popular Online Arts & Cultural Activities



Online engagement varies by segment of the population

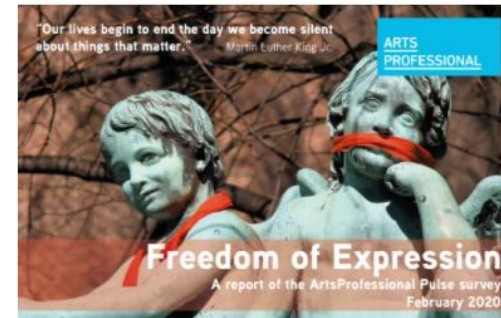


But ... financial sustainability ... ?

[ArtsProfessional](#) | [News](#) | [Features](#) | [Pulse](#) | [Advertise](#)

Survival of the fittest? Recovery forecast assumes a third of arts businesses will fail

ACE has welcomed projections that the sector will recover to pre-Covid levels by 2022. The “bounce back” relies on only the most economically productive organisations surviving.



Latest news

Campaigning intensifies to secure a future for musicians

Friday, 09 October 2020

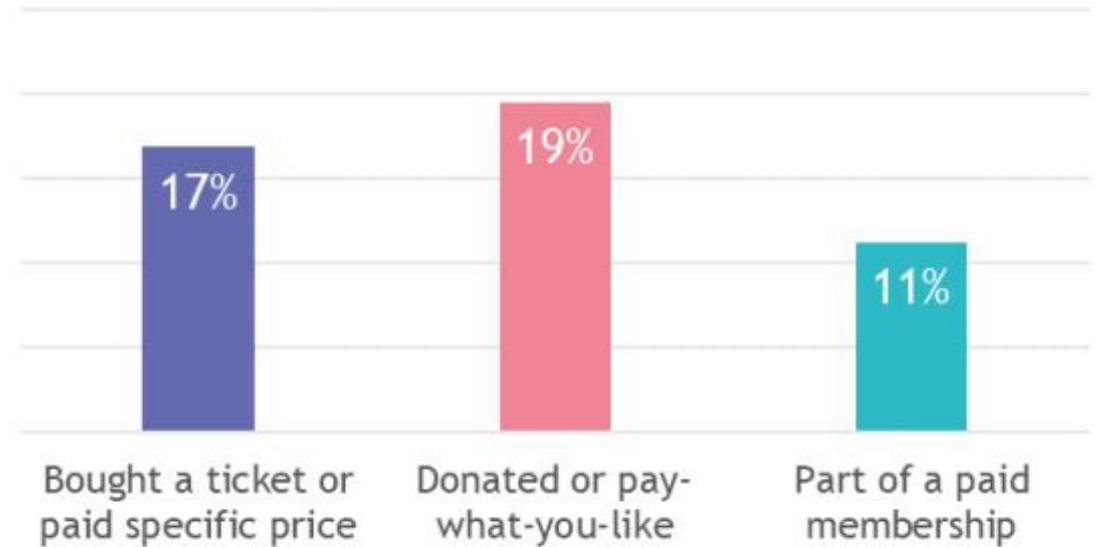
A new campaign led by the combined force of the Incorporated Society of Musicians (ISM) and The Musicians Movement is hoping to secure a support package to ensure

Online Payment

Around **2 in 5** of those who accessed digital content since March 2020 had paid in some form*: **1 in 5** had **donated** for it, and 1 in 6 bought a fixed price ticket.

Memberships were used by 1 in 9, but this was particularly higher for older groups...

Payment Type Made
(of All Who Accessed Digital Content)



*When asked about whether they had paid for the arts/culture they had experienced online, 60% said 'No, they were all free', rather than selecting one or more of the payment options listed. This was highest for Home & Heritage (69%) and Dormitory Dependables (67%), in Northern Ireland, Scotland and Wales (76%, 73% and 70%) and older audiences (55-64, 75%; 65-74, 74%; 75+, 72%)

National Theatre home

Supported by

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**Unmissable theatre,
whenever you
want it.**



National Theatre at Home

Annual - £83.32 / year



Monthly - £8.32 / month



Gift this subscription

Choose between 1-12 months



Discover unforgettable British theatre – any time, anywhere with National Theatre at Home. More fantastic plays are added every month, so there's always something new to look forward to.

Create your account

Already have an account? [Log in](#)

I agree to receive newsletters and product updates from National Theatre at Home

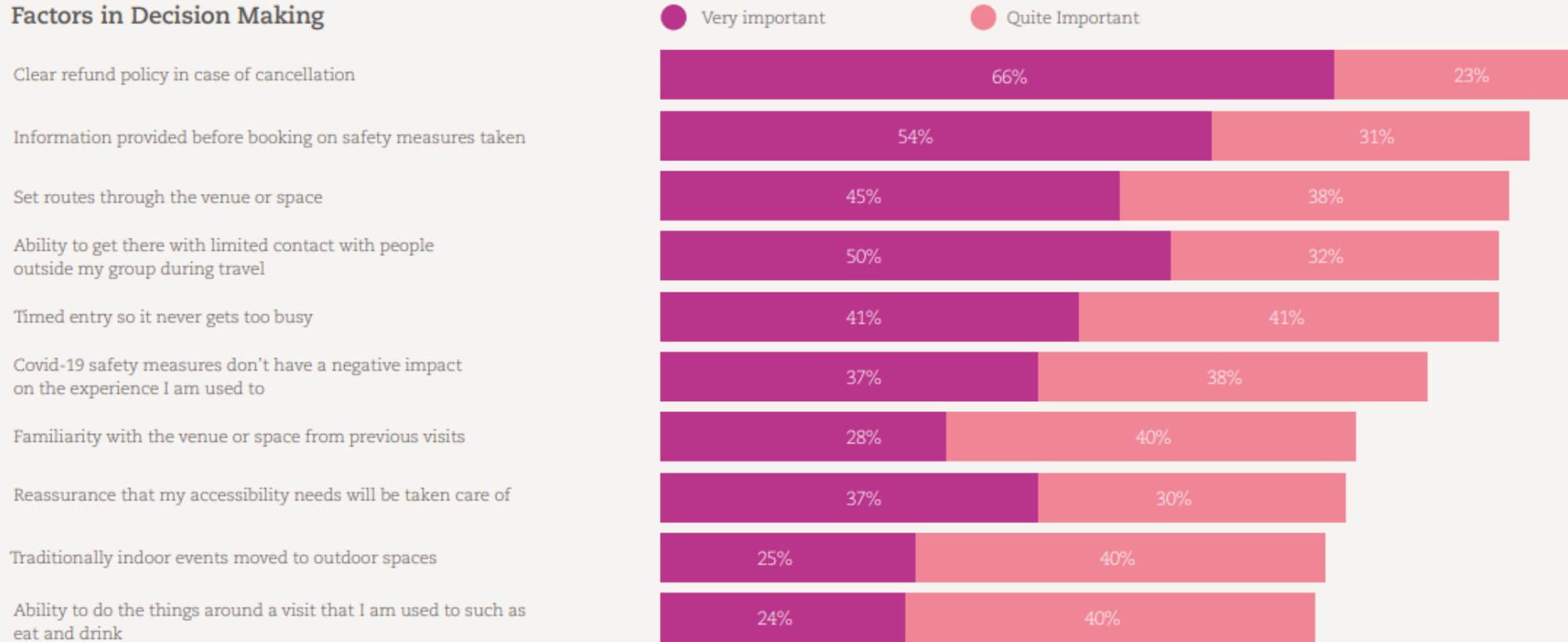
Payment details

Want to add a promo? [Switch to a monthly plan.](#)

Annual subscription	£83.32
Tax:	£16.66
Total:	£99.98

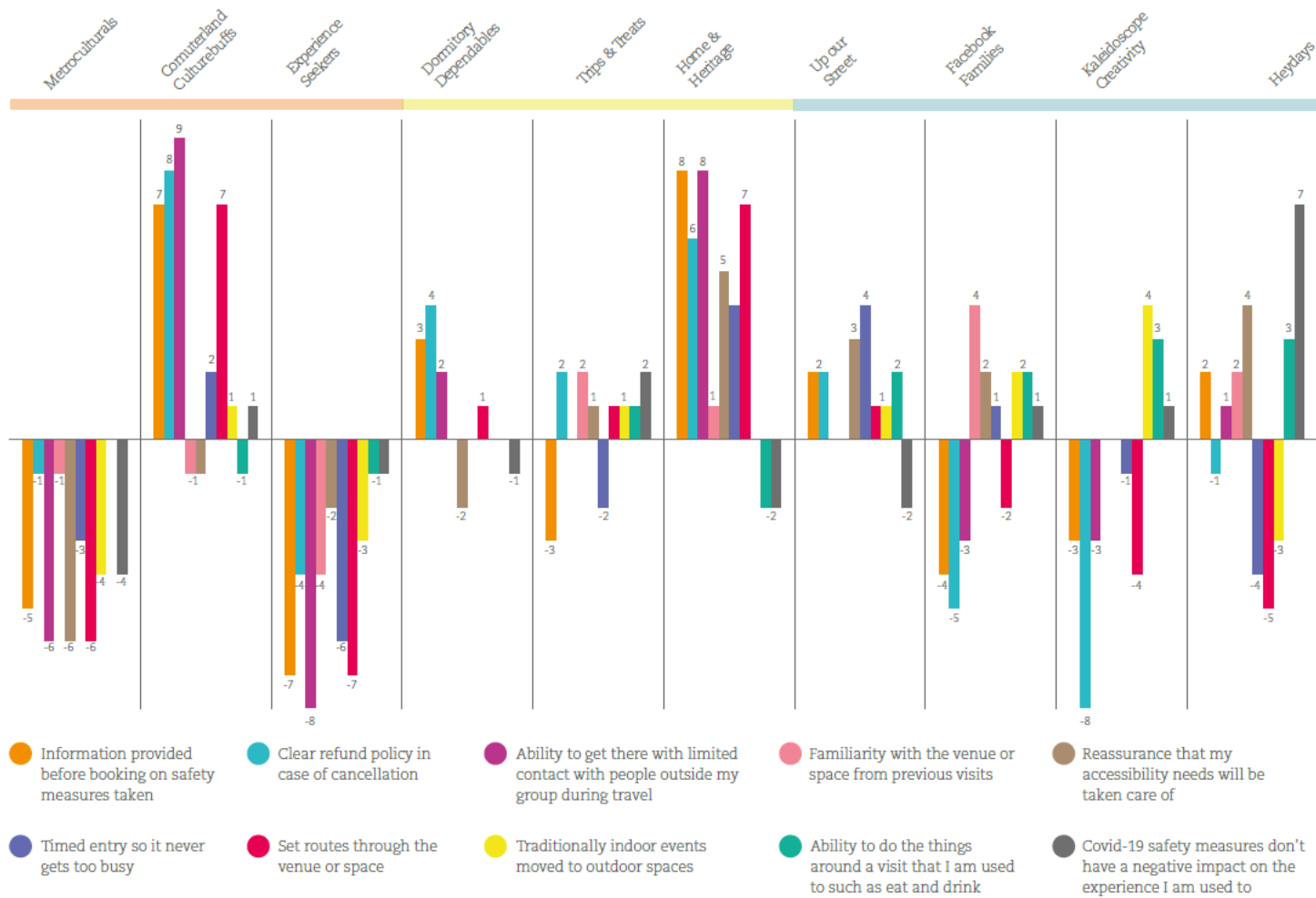
What's next

Factors in Decision Making



Considering What's Next

Important factors for deciding to re-attend: difference by Audience Spectrum segment from overall



The need to be ready

'Since the announcement of the vaccine, it's given our customer base, predominantly those over 65, increased confidence to book and have that summer getaway in 2021'
Jit Desai, National Express.

TUI, the UK's largest tour operator, says 50% of bookings on their website are currently by over-50s. (BBC)

Dawn and Ray - 75 and 78 years old - are from Hampshire and are due to have their first job soon. They have just booked five UK holidays.

'We are raring to go once we've got that vaccine, we are really looking forward to it - both of us. We are going to Wales, Leicestershire, to York where there is a mystery tour - and to the Cotswolds', Dawn said (BBC)

The image shows a screenshot of a BBC News article. At the top, the BBC logo is visible, along with navigation links for Jonathan, Home, News, Sport, Weather, iPlayer, and Sounds. Below this is a red banner with the word 'NEWS' in white. Underneath the banner, there are more navigation links: Home, Brexit, Coronavirus, UK, World, Business, Politics, Tech, Science, Health, and Family & Education. The article title is 'Over-50s rush to book holidays as vaccine boosts confidence'. The author is Simon Browning, a Business reporter, and the article was published 6 days ago. There is a red share button and a tag for 'Coronavirus pandemic'. The main image shows two women wearing face masks sitting on a boat, looking out at the sea. The image is credited to GETTY IMAGES.

Covid-19 Cultural Participation Monitor



Ongoing Covid-19 Participation Monitor:

www.theaudienceagency.org/bouncing-forwards-insights-hub/covid-19-cultural-participation-monitor

Covid-19 Participation Monitor Digital Results:

www.theaudienceagency.org/bouncing-forwards-digital-audience-survey-findings

The Audience Agency's newsletters:

www.theaudienceagency.org/newsletters

Measuring online participation – some thoughts





Measuring online participation – some thoughts

- What are you trying to do? What do you want to measure?
- Online performance or marketing communication?
- The problems of different measures on different platforms
- Break down feedback where you can – eg. not just big numbers – how long were they viewing the video? See Facebook Insight (right)
- Don't neglect the use of qualitative feedback – comments, questions, discussions of audience members



A screenshot of a Facebook video performance analytics dashboard. The title is 'Total Video Performance' with a help icon. Below the title is a list of metrics, each with an icon, a label, a numerical value, and a right-pointing chevron. The metrics are: Minutes Viewed (1,061), 1-Minute Video Views (310), 10-Second Video Views (941), 3-Second Video Views (1,949), Average Video Watch Time (0:16), Audience Retention, and Audience and Engagement.

Total Video Performance		
	Minutes Viewed	1,061
	1-Minute Video Views	310
	10-Second Video Views	941
	3-Second Video Views	1,949
	Average Video Watch Time	0:16
	Audience Retention	
	Audience and Engagement	

And you can always ask people ...

Digital Audience Survey

We are carrying out this survey to better understand who our digital audiences are. We would like to know how you engage with our digital work and what motivates you to do so.

We're also interested in how digital audiences are engaging with arts and culture online, more generally, and how this might be changing during the COVID-19 crisis.

This survey should only take around 5 minutes to complete. Thank you very much for your time.

1. Before we begin the survey, can you tell us your age? (Tick one only)

- | | | | | |
|-----------------------------------|----------------------------------|----------------------------------|--------------------------------------|--|
| <input type="checkbox"/> Under 16 | <input type="checkbox"/> 30 - 34 | <input type="checkbox"/> 50 - 54 | <input type="checkbox"/> 70 - 74 | <input type="checkbox"/> Prefer not to say |
| <input type="checkbox"/> 16 - 19 | <input type="checkbox"/> 35 - 39 | <input type="checkbox"/> 55 - 59 | <input type="checkbox"/> 75 - 79 | |
| <input type="checkbox"/> 20 - 24 | <input type="checkbox"/> 40 - 44 | <input type="checkbox"/> 60 - 64 | <input type="checkbox"/> 80 - 84 | |
| <input type="checkbox"/> 25 - 29 | <input type="checkbox"/> 45 - 49 | <input type="checkbox"/> 65 - 69 | <input type="checkbox"/> 85 or older | |

If under 16 selected, the respondent is shown the following message and redirected to the final submission page:

It is a legal requirement that research with children is based upon consent from a parent or legal guardian, therefore we are unable to conduct a survey with anyone under the age of 16. Thank you for your time.

Your engagement with our website and/or social media platforms

2. On average, how often do you visit our website or social media platforms to watch/read our digital content? (Tick one only)

- | | |
|--|---|
| <input type="checkbox"/> Most days | <input type="checkbox"/> At least every two to three months |
| <input type="checkbox"/> At least once a week | <input type="checkbox"/> At least once a year |
| <input type="checkbox"/> At least once a month | <input type="checkbox"/> This is my first time |

2a. (Question asked of those whose visit frequency is at least 2-3 months or more)

Has the frequency of your visits to our website or social media platforms increased since the COVID-19 crisis?

(Tick one only)

- It has increased significantly
- It has increased somewhat
- It is about the same
- It has decreased
- It has decreased significantly
- Don't know

We'd like to know more about what you have done, or were intending to do, whilst visiting our website/social media platforms today

4. What did you want to do whilst visiting our website/social media platforms today? (Tick all that apply)

- | | |
|---|--|
| <input type="checkbox"/> View a video or live stream | <input type="checkbox"/> Find out about membership |
| <input type="checkbox"/> Get information on digital events/content | <input type="checkbox"/> Donate to the organisation |
| <input type="checkbox"/> Browse virtual art/media archives | <input type="checkbox"/> Find out more about the organisation |
| <input type="checkbox"/> See something online that I am unable to see in person | <input type="checkbox"/> Get updates about events I had planned to see in person |
| <input type="checkbox"/> Conduct research | <input type="checkbox"/> Purchase a ticket or something from the online shop |
| <input type="checkbox"/> Use or download an image | <input type="checkbox"/> Something else - what else did you want to do today? |
| <input type="checkbox"/> Interact with the organisation and/or artists | _____ |
| <input type="checkbox"/> Share my opinions/ideas | _____ |

Motivations for engaging with our website or social media platforms in this way

5. (Question asked of those that select at least one answer from column 1 Q4)

Which of the following describe your motivations for watching/reading digital content on our website today? (Tick all that apply)

- | | |
|--|--|
| <input type="checkbox"/> To be intellectually stimulated | <input type="checkbox"/> For escapism |
| <input type="checkbox"/> To be entertained | <input type="checkbox"/> For academic reasons |
| <input type="checkbox"/> To be inspired | <input type="checkbox"/> For professional reasons |
| <input type="checkbox"/> To discover something new/out of the ordinary | <input type="checkbox"/> To entertain my children |
| <input type="checkbox"/> To learn something | <input type="checkbox"/> To educate/ stimulate my children |
| <input type="checkbox"/> For reflection | <input type="checkbox"/> Other - please specify |
- _____

6. Do you have any further comments about your experience of our website or social media platforms? (Please describe below)

Thank you!

www.theaudienceagency.org

@audienceagents / @JonnyGoodacre

jonathan.goodacre@theaudienceagency.org