

The Audience Audit **Belfast**



Who went to the arts in Belfast between 2006 and 2008?

Introduction

As the infrastructure of arts provision in Belfast continues to benefit from the most significant investment in a generation, creating new buildings and refurbishing existing venues, there can be no better time to take stock of our existing audiences and look to the future.

In April 2008, Audiences NI published the Audience Audit, the first report of its kind, profiling audience demographics and behaviour in 2008 at 22 arts organisations across Northern Ireland. The Audience Audit Belfast looks specifically at audiences within the context of Belfast based arts organisations, and analyses over a longer period of time to see how patterns have changed in recent years.

The Audience Audit Belfast is based on box office data drawn from 8 arts organisations programming events in Belfast between 2006 and 2008. These organisations were included on the basis of their having box office systems connected to Vital Statistics, the analytics software used by Audiences NI.

Therefore, while the findings from this report represent the most robust piece of market intelligence on audiences in Belfast to date, they do not represent a comprehensive overview, rather they represent a minimum of arts attendance between 1st January 2006 and 31st December 2008.

The Audience Audit Belfast was *commissioned by the Old Museum Arts Centre / The MAC.*



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Drawing comparisons with the Audience Audit 2008

At various points within this report, comparisons are drawn between these findings and the overall Audience Audit for 2008. Comparisons should therefore be understood within the context that this report;

- covers 8 Belfast based organisations, rather than 22 Northern Ireland wide organisations;
- covers a 3 year period, rather than a 1 year period;
- data for both the Belfast Waterfront and the Ulster Orchestra are included in this report, but were not included in the Audience Audit 2008.

Executive Summary

The Audience Audit Belfast findings show that;

- Combined, these 8 arts organisations contributed £28,059,571.41 in ticket revenue to the Northern Ireland economy between 2006 and 2008. This does not take into account the secondary spend generated by arts attendance for restaurants, bars, hotels and the wider economy.
- 21% of households in Northern Ireland booked for the arts in Belfast between 2006 and 2008. Between 10% and 12% of households in Northern Ireland were attending in an individual year.
- 2007 recorded the highest level of ticket sales across these 8 organisations over the three year period analysed, with 2008 in second place.
- Bookers for the arts in Belfast were coming from all nine Mosaic groups, demonstrating that the arts is enjoyed by the full spectrum of Northern Irish society.
- 22% of households booking for the arts between 2006 and 2008 were from the Ageing Suburbanites Mosaic NI group. 16% of households were from the Wealth and Wisdom group, 16% were from the Better Off Families group and 10% were from the Farming Communities group.
- Over the 3 year period, a household was worth an average of £164.82 to the arts in Belfast. A household in the Mosaic NI group Wealth and Wisdom was worth the most in average ticket revenue per household at £211.76 across the 3 year period.
- Theatre 'Entertainment' was the most prominent artform genre between 2006 and 2008, attracting 37% of households and representing 29% of tickets sold and 25% of revenue generated.

The organisations which provided data for analysis in this report were:



Data Gaps:

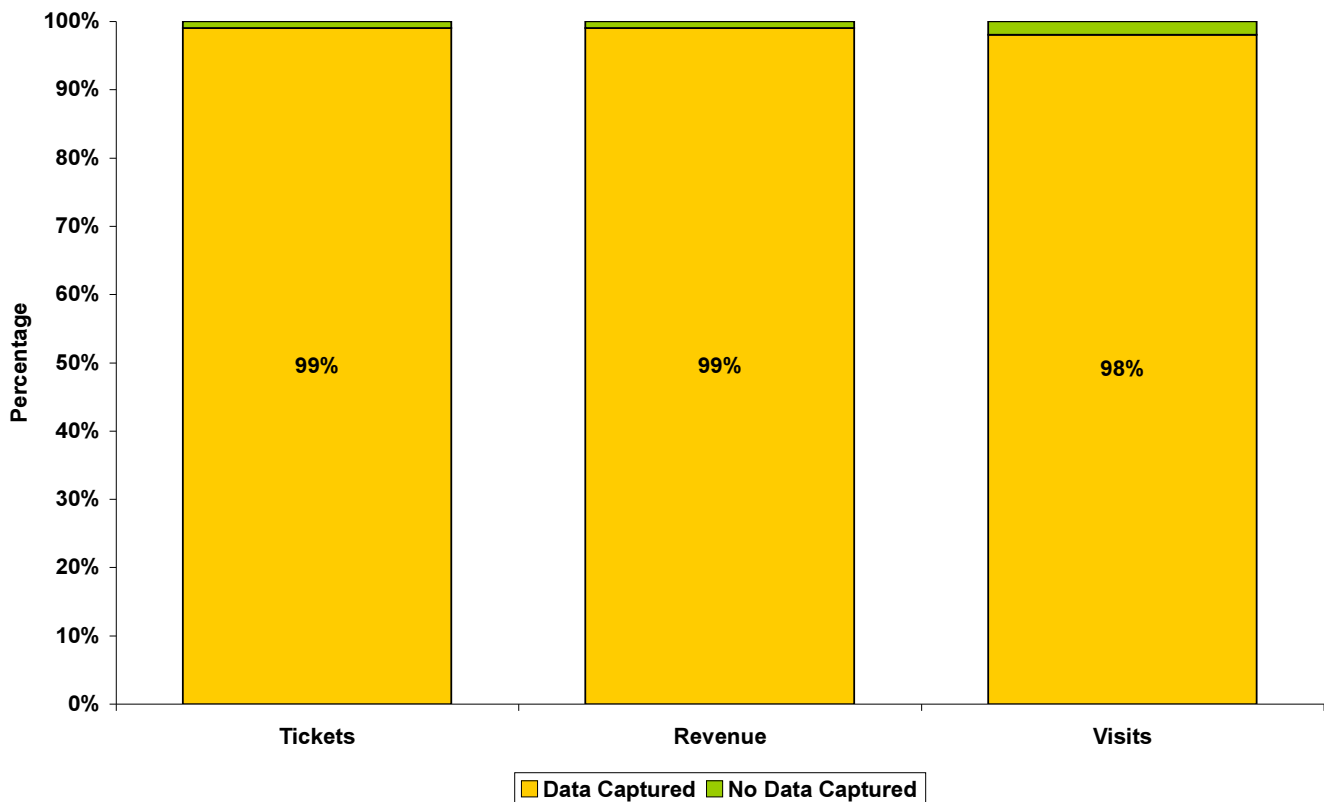
- The Grand Opera House closed between May 2006 and October 2006 for refurbishment. They were not programming events off site in this time. However, in October 2006 the Grand Opera House re-opened with a new second performance space.
- The Lyric Theatre went dark in January 2008 for a rebuild. They were programming events off site during 2008, but not at a comparable level of programming to previous years and these events were not sold through their own box office system. However, some of their sales during this period will be represented within this report in the sales data from the Cathedral Quarter Arts Festival and the Grand Opera House.
- Due to technical restrictions with their box office system, figures relating to the number of tickets sold by Young At Art will be less than in reality, Family tickets were recorded as 1 ticket, but were actually representative of 4 or 6 tickets. This issue did not affect the revenue, households or visit measures.

Methodology

A two-tier methodology was used in this report – transactional analysis (e.g. how many tickets were sold) and demographic profiling (e.g. what type of people were attending).

Vital Statistics

Audiences NI is connected to the box office systems of 22 arts organisations across Northern Ireland via Vital Statistics software, allowing us to collate anonymised data on ticket transactions on a daily basis. This includes the 8 organisations included in this report. This allowed us to look at indicators such as how many tickets were sold in 2006, 2007 and 2008, when they were sold, how much revenue they generated and so on.



The intelligence being gathered on audiences is increasingly robust at an individual organisation level. Customer name and address data (regardless of the geographic origin of the customer) was captured on 98% of the visits across the 3 year period, 99% of the tickets purchased and 99% of the revenue generated through ticket sales at the 8 Belfast based venues between 2006 and 2008.

The analysis is based on households rather than the total number of people attending. This is because the name and address data that is collected as standard during the booking process is purely relating to the person making the booking.

There is currently no way to gather information on who a booker is bringing with them as standard, so the most reliable level of data to analyse is the combined purchase history of everyone within each individual household.

Using Vital Statistics we based our analysis on the following data:

Year	Total Number Of Household Bookers & Blank Accounts	Total Number Of Tickets Purchased ¹	Total Amount Of Ticket Revenue Generated ¹	Total Number Of Visits ¹
2006	79,080	495,342	£7,248,425.30	130,840
2007	100,339	665,749	£10,996,772.04	180,818
2008	97,072	561,504	£9,814,374.07	163,759
Total	194,279	1,722,595	£28,059,571.41	475,417

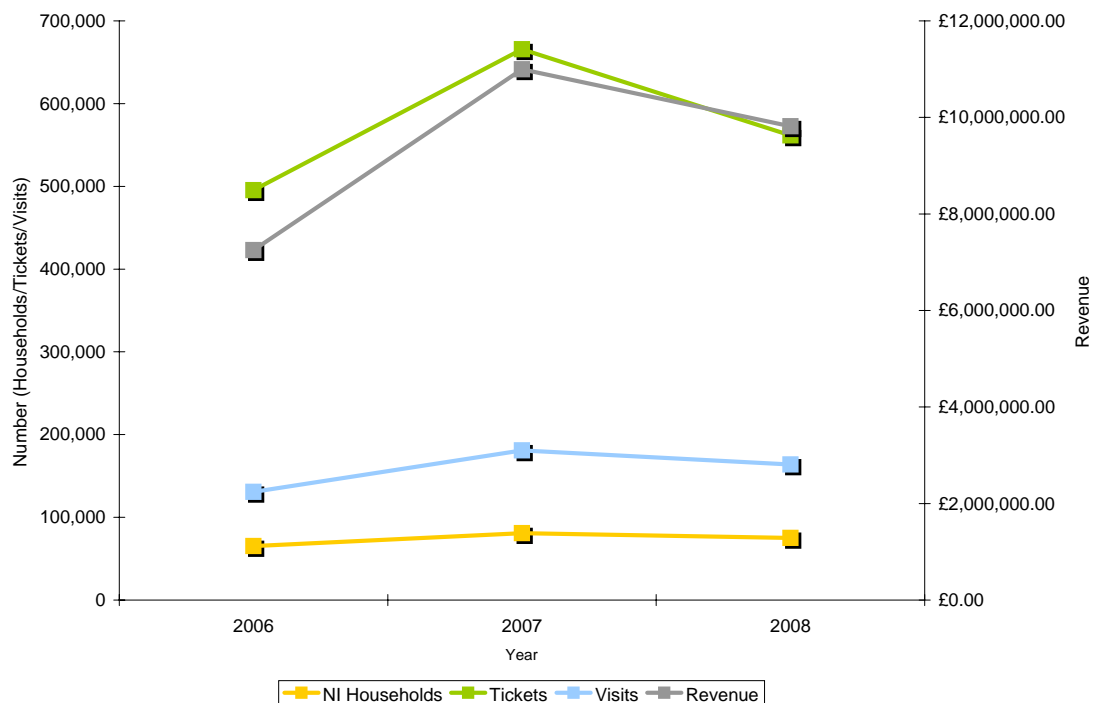
¹ Some of these tickets were purchased by households which could not be identified or were from outside Northern Ireland.

In total, bookings for the arts at these 8 Belfast based organisations between 2006 and 2008 came from 144,020 households that could be verified as being within Northern Ireland (based on records having captured identifiable BT postal addresses). This represents 21% of the total households in Northern Ireland (based on Mosaic NI household estimate of 680,410).

- 65,149 households with BT postal addresses booked in 2006 (10% NI penetration)
- 80,738 households with BT postal addresses booked in 2007 (12% NI penetration)
- 75,023 households with BT postal addresses booked in 2008 (11% NI penetration)

These figures represent the number of households who booked, not the number of people who attended. In reality therefore, more than the 21% of households analysed here will have attended the arts at these Belfast based venues between 2006 and 2008 and this figure should be treated as a minimum level.

How did sales trends vary overall in Belfast between 2006 and 2008?



More households booked more tickets, generating more revenue and making more visits in 2007 than in 2006 or 2008.

Ticket sales rose by 34% on 2006 levels in 2007, but dropped back by 16% of 2007 sales in 2008. Revenue rose by 52% on 2006 levels in 2007, but dropped back by 11% of 2007 sales in 2008. The periods of closure of the Grand Opera House in 2006 and the Lyric Theatre in 2008 will have affected these trends.

Mosaic NI

Mosaic NI is a classification system which segments consumers into 9 demographic groups specific to Northern Ireland, based on the post code attached to the customer record. It is a useful way of understanding what type of person comes to see your show (e.g. likely age range, marital status and social grade) and where they come from geographically.

The following groups exhibit above average levels of:	
Wealth and Wisdom (Frederick & Hilary)	<ul style="list-style-type: none"> • people aged 45-64, 65+ and 85+ • married couples • households in Social Grades A/B and C1 • people with O-Levels, A-Levels and Degrees • household incomes of £25,000+ and £50,000+
Better Off Families (Geoffrey & Kathryn)	<ul style="list-style-type: none"> • people aged 45-64 and children aged 5 -17 • married couples • households in Social Grades A/B and C1 • people with O-Levels, A-Levels and Degrees • household incomes of £25,000+ and £50,000+
Ageing Suburbanites (Ronald & Norma)	<ul style="list-style-type: none"> • people aged 45-64, 65+ and 85+ • married couples • households in Social Grades A/B and C1 • people with O-Levels, A-Levels and Degrees • household incomes of £13,500+, £25,000+ and £50,000+
Younger Nestmakers (Simon & Karen)	<ul style="list-style-type: none"> • people aged 25-44 and children aged 0 - 4 • co-habiting or married couples • households in Social Grades A/B, C1 and C2 • people with O-Levels, A-Levels and Degrees • household incomes of £13,500+, £25,000+ and £50,000+
Small Town Renters (Walter & Martha)	<ul style="list-style-type: none"> • people aged 65+ • divorcees, widowers and cohabiting couples • households in Social Grades C2, D and E • people with O-Levels • household incomes of under £7,500, £7,500+ and £13,500+
Students and Singles (Steven & Nicola)	<ul style="list-style-type: none"> • people aged 18-24, 25-44 and 85+ • single people, cohabiting couples or divorcees • households in Social Grades A/B, C1 and E • people with A-Levels and Degrees • household incomes of under £7,499 and £50,000+
Poor Seniors and Solos (Alexander & Agnes)	<ul style="list-style-type: none"> • people aged 45-64, 65+ and 85+ • single people, cohabiting couples, widowers or divorcees • households in Social Grades D and E • no levels of qualifications • household incomes of under £7,499 and £13,500+
Housing Exec Tenants (Anthony & Theresa)	<ul style="list-style-type: none"> • people aged 18-24 and children aged 0-4 or 5-17 • single people, cohabiting couples or divorcees • households in Social Grades D and E • people with O-Levels • household incomes of under £7,499 and £13,500+
Farming Communities (Seamus & Brigid)	<ul style="list-style-type: none"> • people aged 25-44 and children aged 0-4 or 5-17 • married couples • households in Social Grade C2 • people with O-Levels • household incomes of £13,500+, £25,000+ and £50,000+

Mosaic NI takes into account a detailed analysis of the social trends in Northern Ireland, using a wide variety of data sources and extensive fieldwork and market research to assist in validation and interpretation of the segmentation. Just over half of the information is drawn directly from the 2001 NI Census, with the remainder coming from supplementary lifestyle surveys and other demographic information sources.

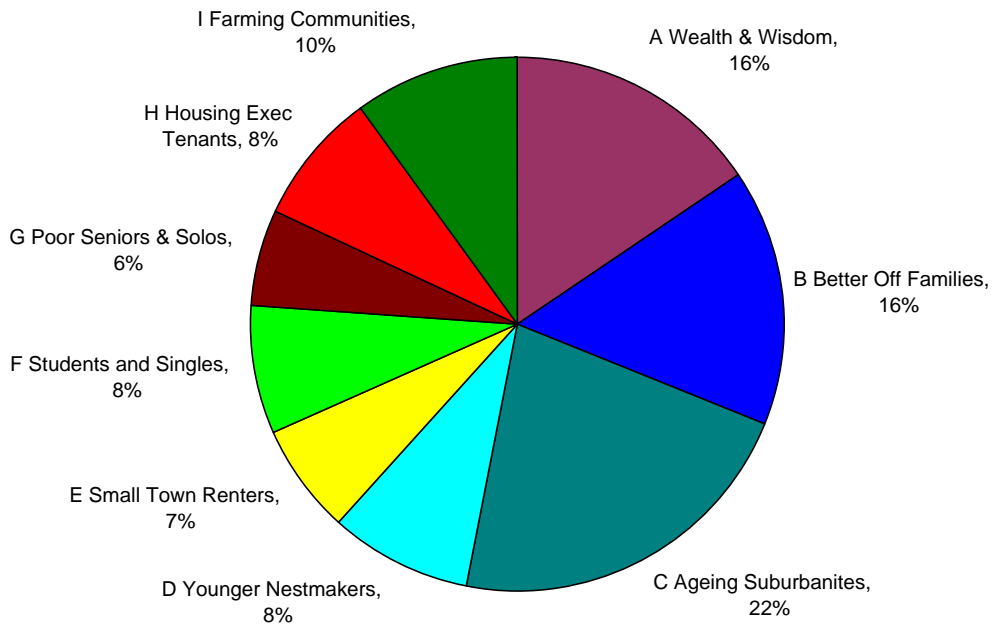
142,377 of the households in Northern Ireland (99%) that booked for the arts at these Belfast based organisations between 2006 and 2008 had the requisite level of data to be classified into a Mosaic NI group.

There are a number of reasons why a Mosaic NI code may not have been appended. Some households may not have had any address data captured, some may not have had their postcode captured, the postcode may be incorrect or very new, or the address could be from outside Northern Ireland.

Findings

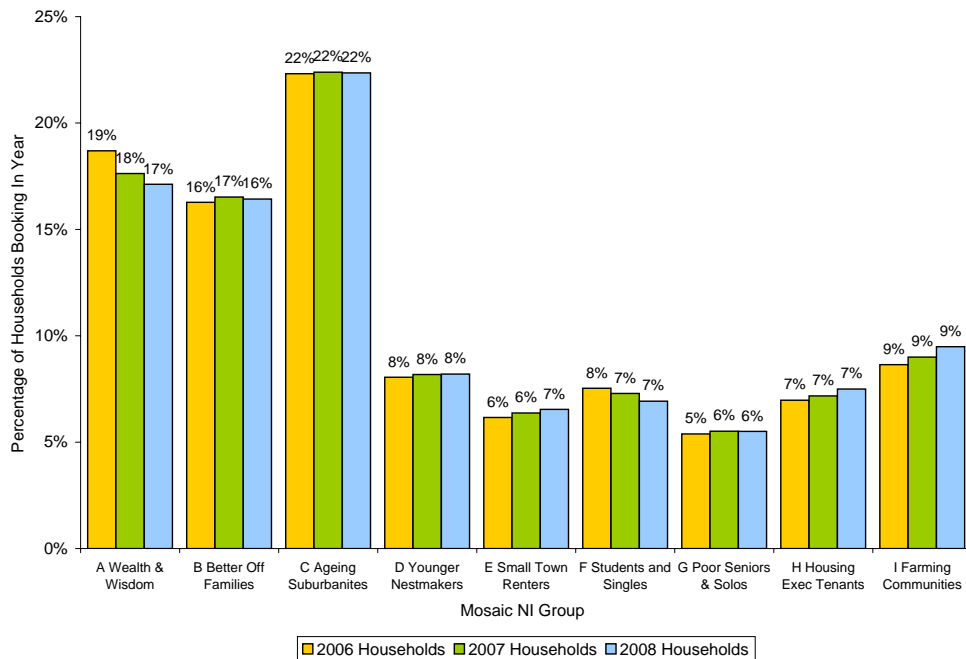
Arts attendance by Mosaic NI Group

2006 to 2008 Combined Attenders



Arts events at these 8 Belfast venues attracted a broad spectrum of the different types of households which exist in Northern Ireland between 2006 and 2008. Household bookers came from all nine of the Mosaic NI Groups, ranging from a maximum 22% of households classified as being in the Ageing Suburbanites group, to a minimum of 6% of households classified being in the Poor Seniors and Solos group.

2006 to 2008 Broken Down By Year



Looking at individual years, the percentage coming from each Mosaic NI group remains reasonably constant. The highest level of variation across 2006 to 2008 is in the Wealth and Wisdom category, which varies by 2% over the 3 year period. (NB: a negative percentage variance does not necessarily indicate a drop in numbers, in fact all of the Mosaic NI groups peaked in 2007 in terms of numbers).

No single Mosaic group is particularly prominent in terms of bookers compared to the other Mosaic groups, but a higher percentage of attendances are coming from Mosaic groups which are more likely to contain older married people, with degrees and household incomes in the higher ranges (£25,000 + or £50,000 +), in Social Grades A/B, C1 or C2. However, that does not mean that all arts attenders have these characteristics, e.g. 29% of households were in a Mosaic NI group which contains above average levels of households with incomes less than £13,500 a year.

Compared to the overall make-up of the population, some groups do seem to be more inclined to attend than others however. For example, 7% of the households in Northern Ireland are in the Wealth and Wisdom Mosaic group but Wealth and Wisdom made up between 16% of arts bookers for events in Belfast between 2006 and 2008. This indicates that there was an above average level of interest in arts events from this group because a higher percentage of arts attendances come from this group than are present in the population. Arts events in Belfast between 2006 and 2008 attracted;

Above average levels of interest >	Wealth & Wisdom Better Off Families Ageing Suburbanites Students & Singles
Below average levels of interest >	Younger Nestmakers Small Town Renters Poor Seniors and Solos Housing Exec Tenants Farming Communities

Three of the four Mosaic groups which included the most arts bookers also show above average levels of attendance compared to the population overall. Wealth and Wisdom, Better Off Families and Ageing Suburbanites can therefore be considered the Mosaic NI groups which are most likely to yield arts bookings.

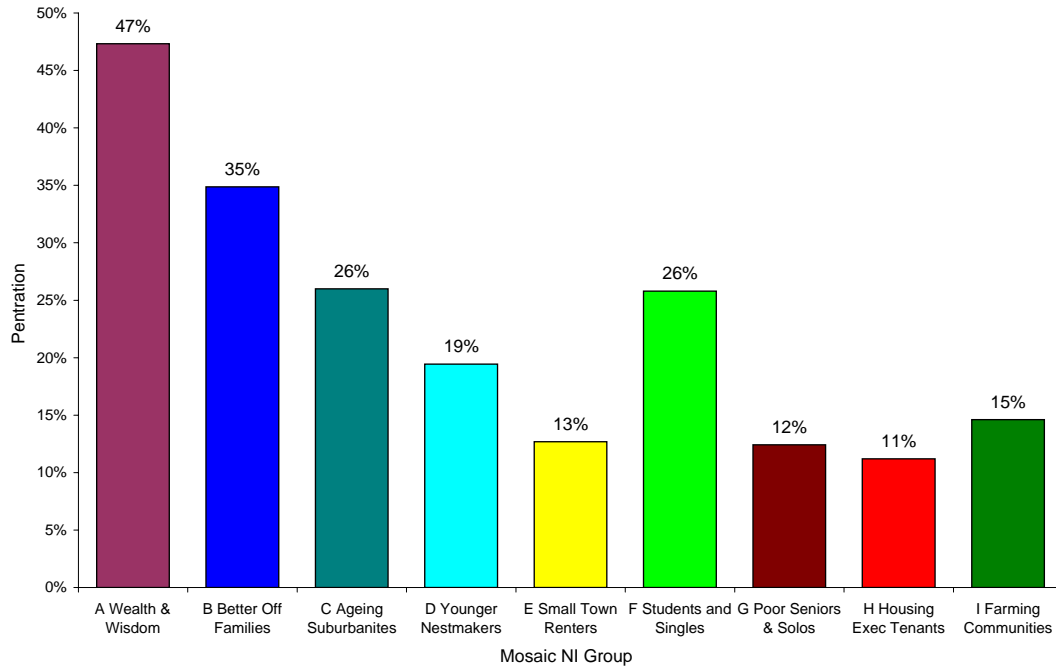
At Northern Ireland level, Farming Communities exhibited a below average likelihood of attendance, but were the fourth largest group attending Belfast venues between 2006 and 2007. There may therefore be untapped potential within this group as well.

How do these results compare against arts organisations across Northern Ireland?

Compared to the overall Audience Audit for 2008, Wealth and Wisdom (up 4%), Better Off Families (up 1%) Ageing Suburbanites (up 1%), Students and Singles (up 3%) and Poor Seniors and Solos (up 2%) are all slightly more prominent amongst Belfast bookers than they are Northern Ireland wide. This is partially because Wealth and Wisdom and Students and Singles households are less dispersed throughout the country, and are more likely to be within a 30 minute catchment drivetime of Belfast.

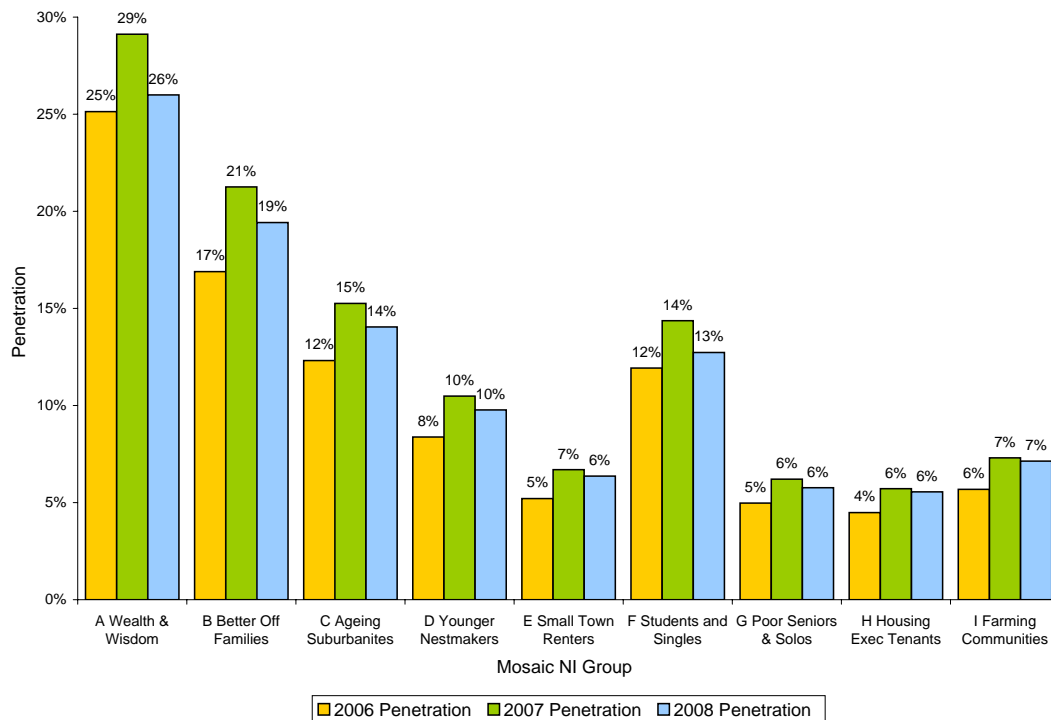
Farming Communities (down 6%), Housing Exec Tenants (down 2%), Younger Nestmakers (down 1%) and Small Town Renters (down 1%) were less prominent for Belfast venues between 2006 and 2008 than they were at Northern Ireland level in 2008.

Penetration Levels in Northern Ireland



Overall, across the three years, the highest penetration of household bookers amongst the overall household population was within the Wealth and Wisdom Mosaic Group, where 47% of the households in this group in Northern Ireland overall booked tickets between 2006 and 2008.

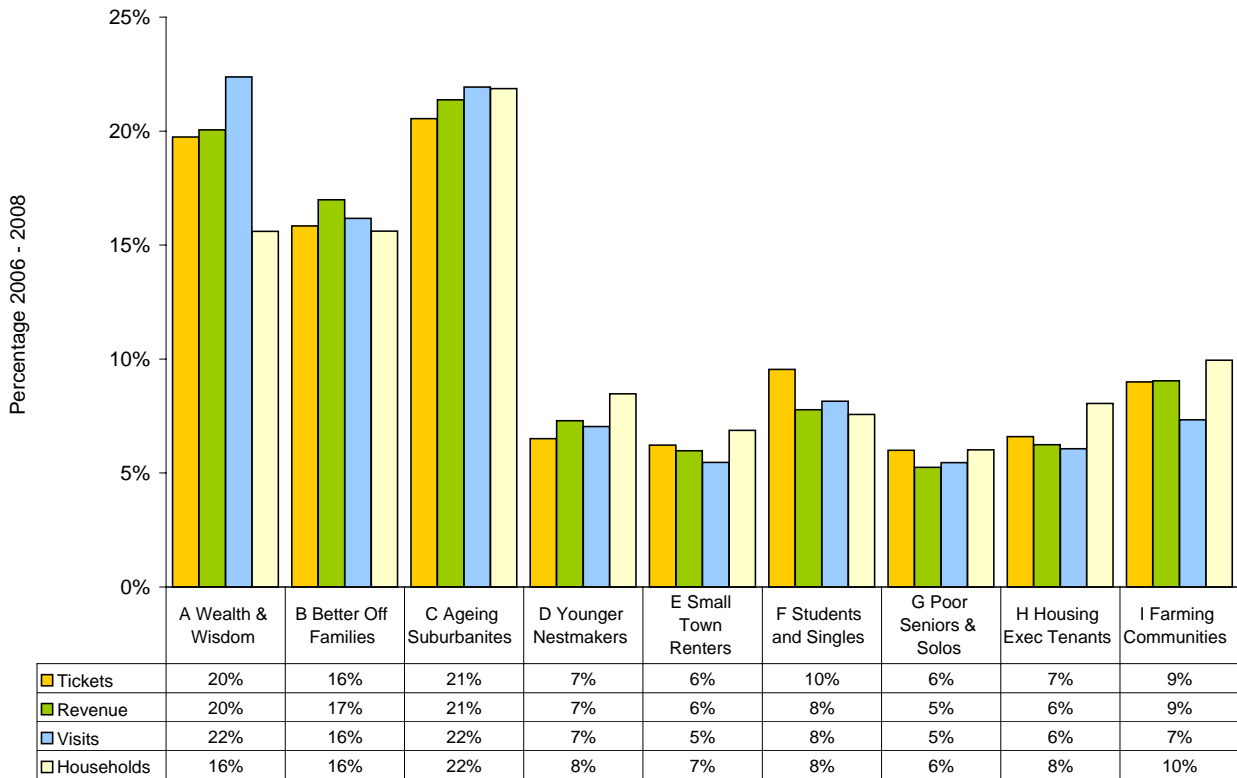
The lowest penetration across Northern Ireland was in the Mosaic NI Group Housing Exec Tenants, where 11% of the households in this group in Northern Ireland overall booked tickets between 2006 and 2008.



On average, penetration amongst Mosaic NI groups by Belfast venues varied by no more than 2% across the three individual years. At most there was a difference of 4% across the period 2006 to 2008 in both the Wealth and Wisdom (between 25% and 29% of households booking in a given year) and Better Off Families groups (between 17% and 21% of households booking in a given year). Ageing Suburbanites varied by 3% (12% to 15% of households booking in a given year).

Booking behaviour by Mosaic NI Groups

83% of the visits made, 77% of the tickets purchased and 83% of the revenue generated between 2006 and 2008 by these Belfast organisations could be identified as being within a Mosaic NI group.



Overall, an individual household was worth an average of £164.82 across the three years to a Belfast based arts organisation. On average bookers bought 3 tickets per visit worth £59.52.

On average, people were visiting as often in 2008 than they were in 2006 or 2007 (2 visits per household). However, the amount they were spending on average per visit rose from £53.83 in 2006, to £60.49 in 2007, then grew very slightly to £60.57 in 2008. However, the average spend per household was greater in 2007 (£116.23) than in 2008 (£109.08).

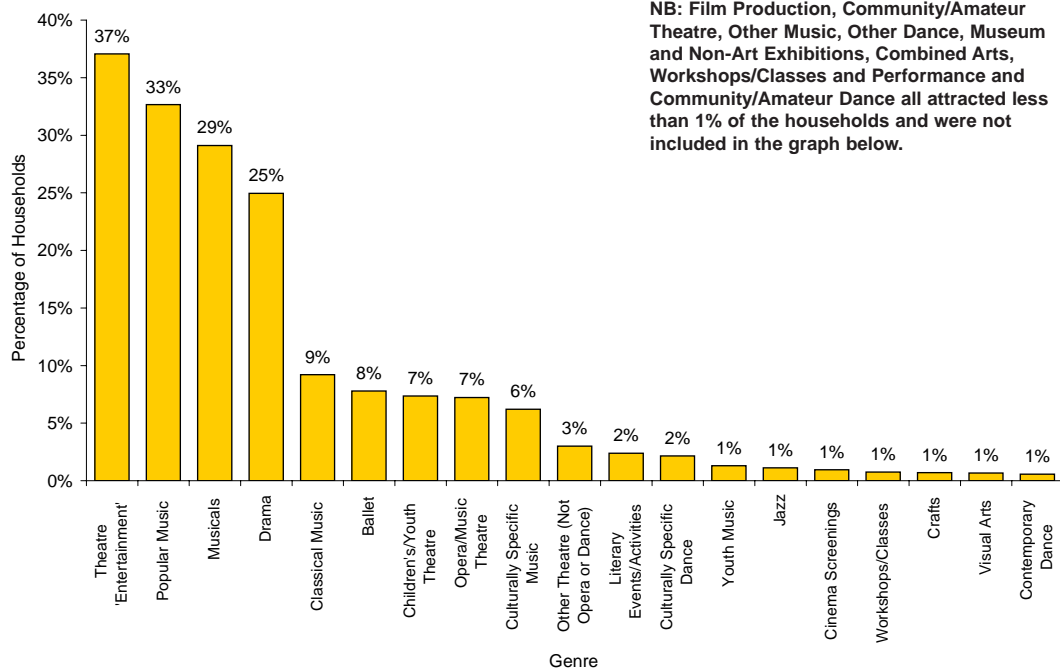
A household in the Mosaic NI group Wealth and Wisdom was worth the most in average ticket revenue per household at £211.76 across the 3 year period, although they had the lowest average spend per visit (£53.51). Housing Exec Tenants were worth the least amount on average to the arts in Belfast across the three year period at £127.79 per household, spending £61.29 per visit.

The visits made, tickets purchased and revenue generated by each Mosaic NI group across the 3 years was generally in proportion to the percentage of households in that Mosaic NI group (mostly within a 3% variance). The only group displaying a variance greater than 3% is Wealth & Wisdom, which made up only 16% of the households booking, but bought 20% of the tickets, generated 20% of the income and made 22% of the visits.

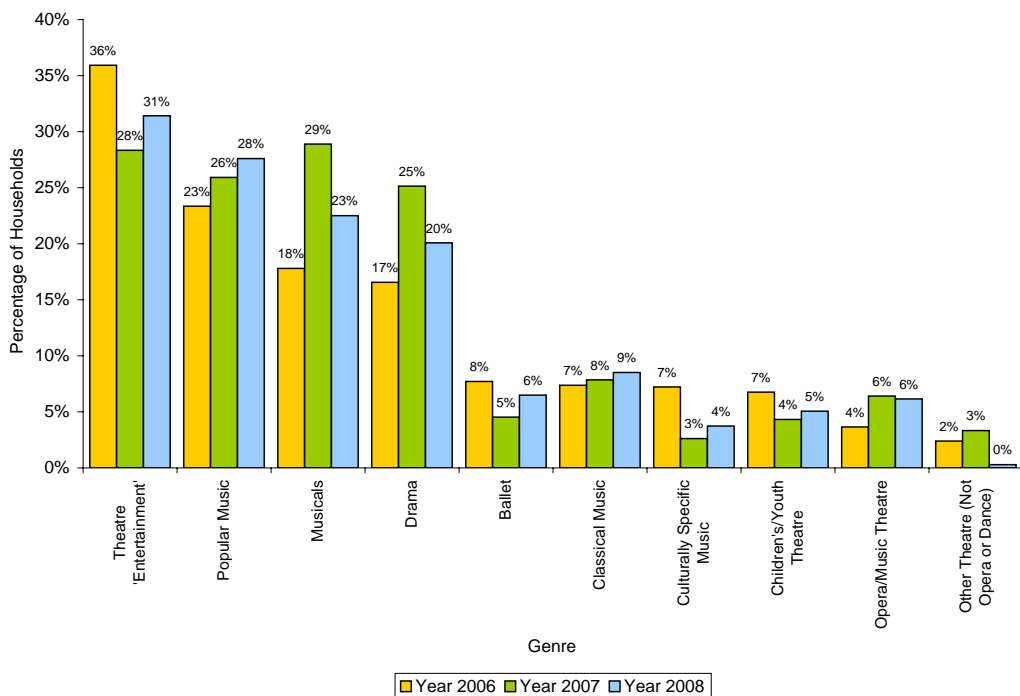
NB: There was a large increase in the number of tickets bought and revenue generated by Students and Singles booking at one venue in 2007, but the number of households coming from that group remained at a comparable level to previous years. As the organisation's box office is in a postcode classified as Students & Singles, it is therefore likely that these were door sales or sales without data capture that were allocated to an account using the organisation's own post code.

Attendance by Genre

To look at attendance by Artform we used the Audience Data UK Classifiers, First Tier (Genre). (See Page 19 for more information.)



The Theatre 'Entertainment' genre attracted the most households overall across the 3 year period with 37% of household bookers attending. This genre includes Pantomime, Variety, Cabaret, Comedy/Comedians amongst other specialisms. Popular Music (33% of household bookers), Musicals (29% of household bookers) and Drama (25% of household bookers) were also widely popular across the three years.



Amongst the majority of the top ten genres for interest, there is a low level of percentage variance across the years (no more than 3% to 4%).

However, amongst the more popular genres there is a higher level of variance. Theatre 'Entertainment' dropped by 8% of households between 2006 and 2007. However, this is actually only a numeric drop of 524 households.

In contrast, the percentage of 2007 bookers attending Musicals and Drama rose drastically between 2006 and 2007, which was also reflected in the numerical increase in households. Musicals rose by 11% (11,450 households) and Drama by 9% (9,411 households).

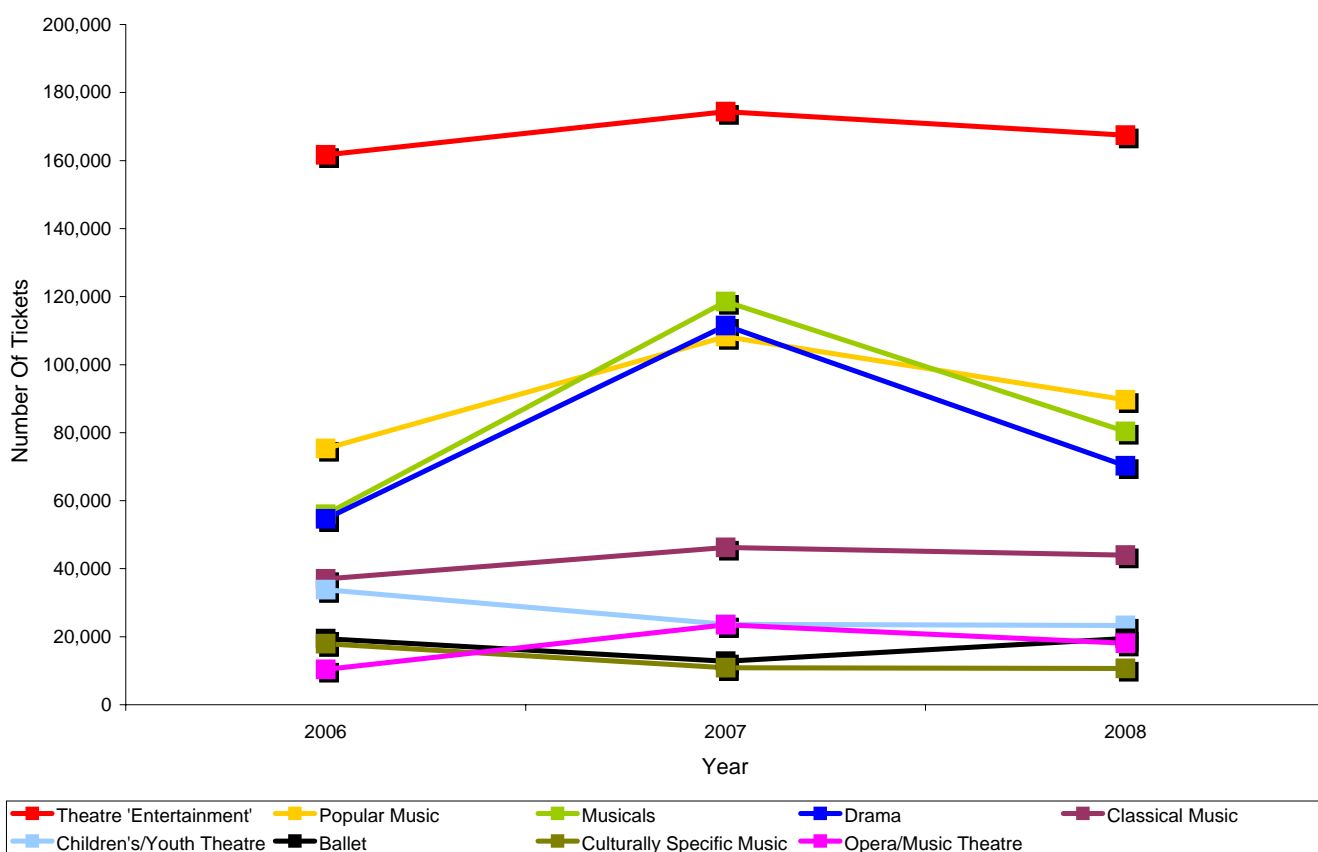
However, both of these rises in 2007 were followed by drops in 2008. This is linked to increased programming in 2007, where capacity for Drama increased 86% in 2007 and ticket sales increased by 104%, while capacity for Musicals increased by 83% and ticket sales increased by 124%. The drop in capacity for Drama in 2008 was 24% and ticket sales went down by 37%, while capacity for Musicals dropped 17% and ticket sales by 32%. **NB:** The periods of closure at the Grand Opera House in 2006 and the Lyric Theatre in 2008 will have affected these figures.

Genre	Visits	Tickets	Revenue	Average Ticket Yield
Theatre 'Entertainment'	96,573	503,443	£7,125,036.24	£14.15
Popular Music	82,902	273,271	£5,331,348.84	£19.51
Musicals	76,211	254,818	£5,863,880.86	£23.01
Drama	81,332	236,212	£3,314,356.84	£14.03
Classical Music	43,956	127,086	£1,652,870.59	£13.01
Children's/Youth Theatre	16,172	77,354	£683,259.73	£8.83
Opera/Music Theatre	17,515	51,971	£1,099,190.02	£21.15
Ballet	18,972	51,652	£1,159,478.59	£22.45
Culturally Specific Music	12,976	39,334	£731,087.78	£18.59
Other Theatre (Not Opera or Dance)	5,802	21,552	£266,343.81	£12.36
Youth Music	2,372	17,920	£126,662.50	£7.07
Culturally Specific Dance	4,201	14,322	£258,821.73	£18.07
Literary Events/Activities	5,518	13,851	£92,588.85	£6.68
Cinema Screenings	2,180	7,977	£66,148.46	£8.29
Crafts	1,545	6,610	£30,506.00	£4.62
Jazz	2,456	6,138	£88,327.75	£14.39
Workshops/Classes	1,832	5,784	£46,141.50	£7.98
Contemporary Dance	1,615	4,665	£42,325.82	£9.07
Visual Arts	208	3,243	£8,775.50	£2.71
Community/Amateur Theatre	280	2,272	£33,664.00	£14.82
Other Dance	232	1,320	£4,656.00	£3.53
Film Production	439	1,103	£6,448.00	£5.85
Community/Amateur Music	1	350	£26,250.00	£75.00
Museum and Non-Art Exhibitions	84	173	£999.00	£5.77
Community/Amateur Dance	10	126	£0.00	£0.00
Workshops/Classes and Performance	33	48	£403.00	£8.40
Total	475,417	1,722,595	£28,059,571	£16.29

Theatre 'Entertainment' was the most prominent genre in Belfast between 2006 and 2008, recording the highest number of visits (20% of visits overall), tickets purchased (29% of tickets purchased) and revenue generated (25% of revenue generated).

Bookers went more times to see Drama than Musicals (by 5,121 visits), but bought 18,606 more tickets and spent £2,549,524.02 more on Musicals than Drama between 2006 and 2008.

On average, bookers between 2006 and 2008 paid £16.29 per ticket, £1.92 more than the 2008 Northern Ireland average from the main Audience Audit 2008 (£14.37). Musicals were the highest yielding genre, with bookers paying an average of £23.01 per ticket, compared to £22.45 for Ballet, £21.15 for Opera/Music Theatre, £19.51 for Popular Music events, £14.15 for Theatre 'Entertainment', £14.03 for Drama and £13.01 for Classical Music.



Genre	2006 Tickets	% 2006 Tickets	2007 Tickets	% 2007 Tickets	2008 Tickets	% 2008 Tickets
Theatre 'Entertainment'	161,683	33%	174,382	26%	167,378	30%
Popular Music	75,354	15%	108,240	16%	89,677	16%
Musicals	55,953	11%	118,538	18%	80,327	14%
Drama	54,611	11%	111,461	17%	70,140	12%
Classical Music	36,999	7%	46,112	7%	43,975	8%
Children's/Youth Theatre	33,880	7%	22,156	3%	22,318	4%
Ballet	19,379	4%	12,775	2%	19,498	3%
Culturally Specific Music	17,834	4%	10,841	2%	10,659	2%
Opera/Music Theatre	10,375	2%	23,490	3%	18,106	3%

Ticket sales for Theatre 'Entertainment' remained reasonably stable across the 3 year period (an 8% rise between 2006 and 2007, but a 4% drop between 2007 and 2008). However, despite the rise in ticket sales in 2007, Theatre 'Entertainment' made up a higher proportion of the overall tickets sold in 2006 and 2008 than in 2007. This is due to the increase in ticket sales for Musicals and Drama in 2007 (18% and 17% of tickets sold respectively).

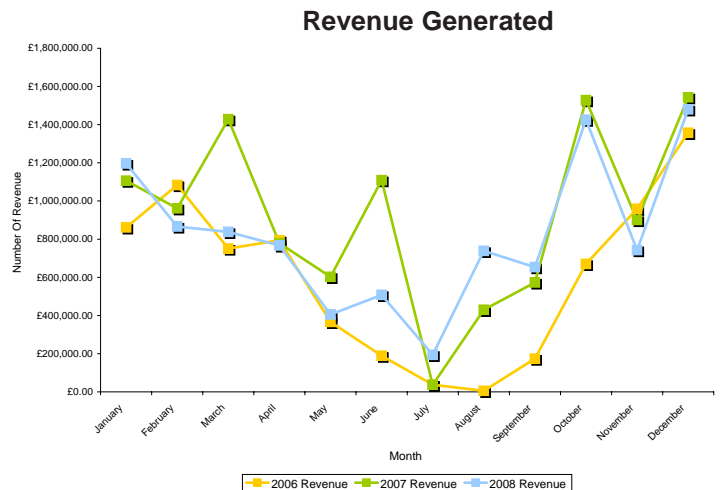
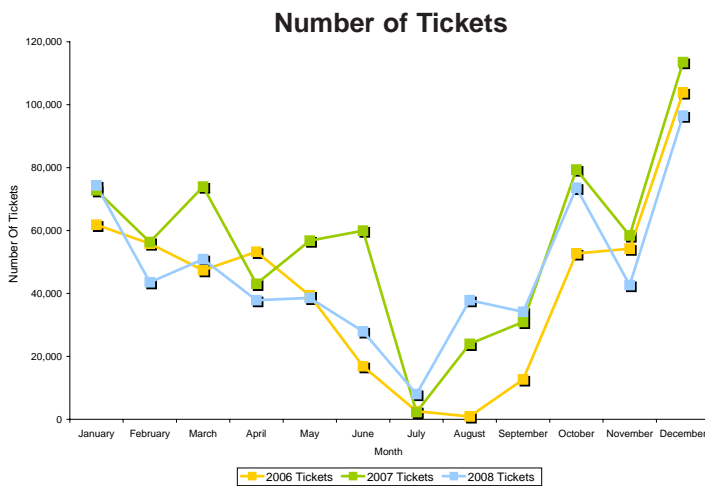
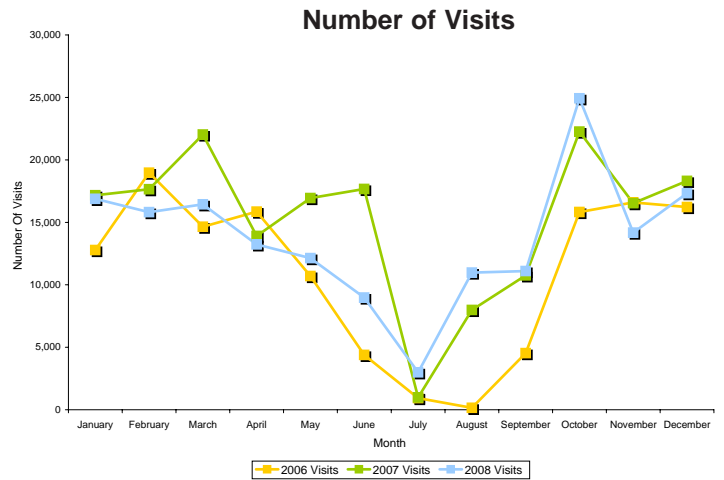
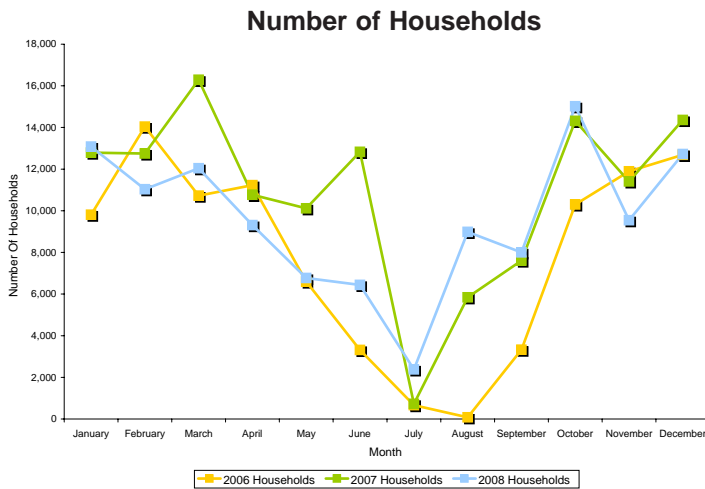
Popular Music, Musicals and Drama sold at similar volumes and follow similar purchase patterns across the three year period, rising and falling to similar degrees. However, the 2007 increase and 2008 decrease were less pronounced for Popular Music (up 44%, down 17%) than they were for Drama (up 104%, down 37%) and Musicals (up 112%, down 32%).

Children's/Youth Theatre, Ballet, Culturally Specific Music and Opera/Music Theatre also sell at similar levels. However, they exhibit different trends in ticket sales across the 3 years. For example, ticket sales for Children's/Youth Theatre dropped by 30% between 2006 and 2007, while sales for Opera/Music Theatre rose by 126%.

Classical Music was consistently more prominent as a genre in Belfast between 2006 and 2008 than the grouping of Children's/Youth Theatre, Ballet, Culturally Specific Music and Opera/Music Theatre, but less prominent than the grouping of Popular Music, Musicals and Drama.

Ticket Booking Patterns

Booking Patterns by Month



All four indicators (households, visits, tickets and revenue generated) follow an approximately similar trend, starting at a high level in January before declining across the first six months of the year into July. The indicators then rebound to a peak in October through August and September, suffer a decline in November before generally peaking again in December.

Summer 2008 (July, August and September) was the best summer for ticket sales and revenue generated in the 2006 to 2008 period. January 2008 was also the strongest opening month of a year in that time period.

Figures for Summer 2006 were noticeably down across all measures compared to 2007 and 2008, particularly in August, although this covers the period in which the Grand Opera House were closed for their rebuild.

However, the strongest Autumn season for ticket sales (October, November and December) was in 2007, and while October 2008 ran a close second to October 2007 figures, November and December 2008 recorded their lowest ticket sales over the three year period.

December is the most important month for ticket sales, with an average of 18% of tickets sold each year for events in December.

December is, on average, also the most important month for generating revenue, with an average of 16% of revenue per year generated by events in December. However, when looking at individual years, October is becoming equally important in Belfast as a month for generating revenue. In 2006, 9% of revenue was generated by events in October, compared to 19% or revenue generated in December. However, in 2007 14% of revenue each was generated in both October and December, and in 2008, 15% of revenue each was generated in both October and December.

October is on average the month with the highest proportion of visits to arts events, with an average of 13% of visits occurring in this month. However, February 2006 attracted more visits and March 2007 attracted only slightly fewer visits, so it is only in 2008 that October was the clearly more prominent for attracting more visits.

February, March, October and December were the most important months for attracting the greatest volume of household bookers, with 18% of households booking in each of these months on average. However, February and December appear to be declining in prominence (drops of 7% and 3% respectively between 2006 and 2008) while October is becoming more prominent (up 4% between 2006 and 2008).

In 2006, August recorded the annual lows for tickets (0.2%), revenue (0.1%), visits (0.1%) and households (0.1%). However, in 2007 and 2008, July was the lowest month for tickets (0.3% and 1% respectively), revenue (0.3% and 2% respectively), visits (1% and 2% respectively) and households (1% and 3% respectively).

On average, a single visit to an arts event in Belfast between 2006 and 2008 was worth £59.02, with an average of 4 tickets purchased per visit but in December and January a single visit is worth more on average; £84.44 in December (average of 6 tickets) and £67.56 in January (average of 4 tickets per visit).

How consistent is seasonality across Belfast venues?

Between 2006 and 2008, each calendar month varied across the three years by:

- an average of 21,017 tickets, maximum difference of 42,249 tickets (June), minimum difference of 5,719 tickets (July)
- an average of £420,129.61, maximum difference of £919,635.62 (June), minimum difference of £27,600.92 (April)
- an average of 5,844 visits, maximum difference of 12,936 (June), minimum difference of 2,065 (July)
- an average of 4,235 households, maximum difference of 9,509 (June), minimum difference of 1,675 (December)

December is the most consistent month across the 3 years (number 1 month for tickets in all three years, number 1 for revenue in all three years, number 2 for households in 2 out of 3 years and number 3 for visits in 2 out of 3 years).

No measure is particularly consistent across the three year period. When each month is ranked in order from highest to lowest for each measure, 5 out of 12 months for tickets and 4 out of 12 months for visits retained their ranks over at least 2 out of the 3 years (i.e. where a month was 2nd in 2006, 1st in 2007 and 1st in 2008). This was compared to 4 out of the 12 months which retained their ranks for revenue and 3 out of 12 months which retained their ranks for households. However, where similar quantities of each measure were being recorded in different months, a swing in the rankings could be affected by only a small increase or decrease in tickets, households, revenue or visits.

How do 2008 sales compare across the three year period?

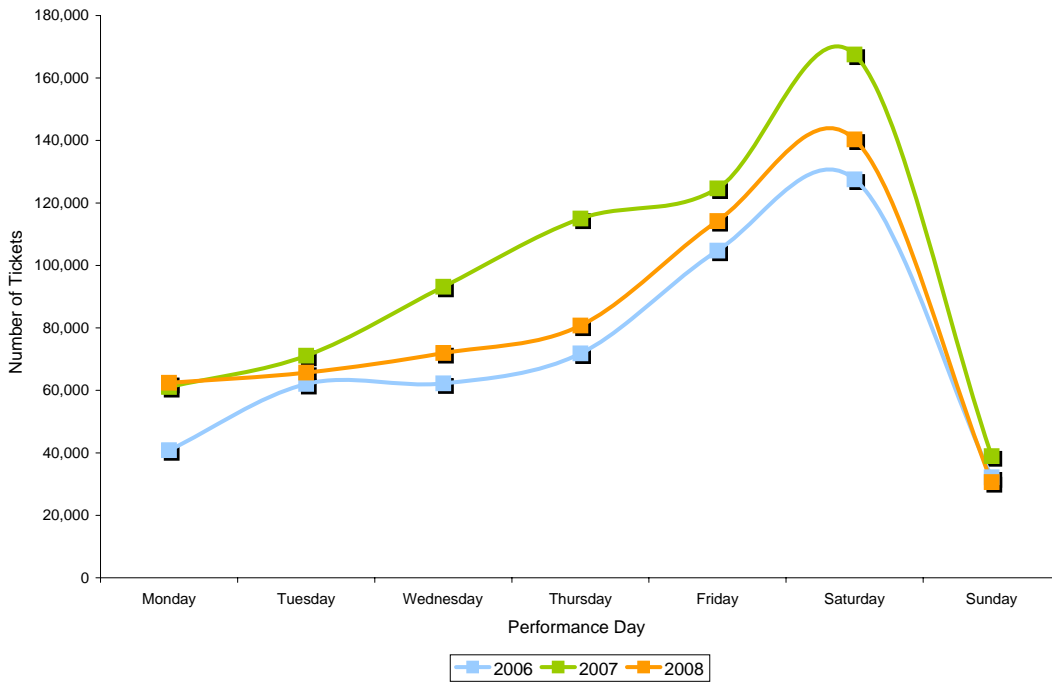
Looking specifically at the year 2008, it recorded;

- three year high revenue figures in 4 months (January, July, August and September)
- three year median revenue figures in 5 months (March, May, June, October and December)
- three year low revenue figures in 3 months (February, April and November)

In contrast, 2007 recorded three year highs in 5 months and only 1 three year low. 2006 only recorded a three year high in only 3 months, and three year lows in 7 months.

2008 was therefore slightly less successful in terms of revenue generated than 2007, but still above 2006 revenue levels.

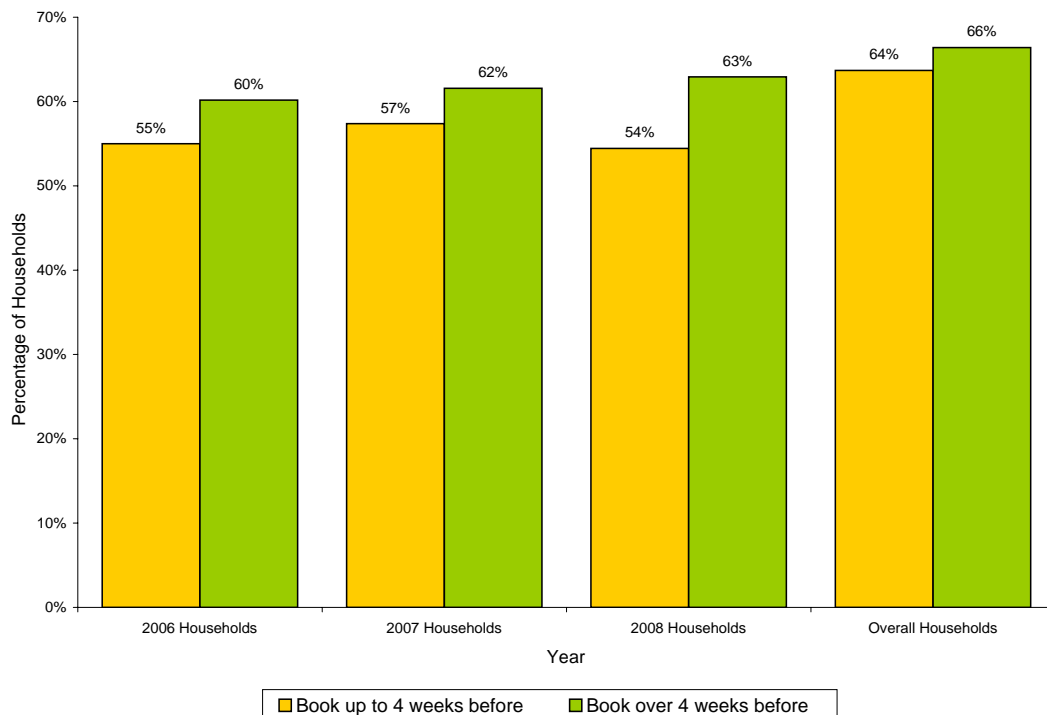
Ticket Sales by Day Of The Week



Performances on Fridays (20% of tickets per year on average) and Saturdays (25% of tickets per year on average) generated the most ticket sales in 2006, 2007 and 2008, and the number of tickets rose consistently as the day of performance got later in the week. There are more than four times as many tickets sold for events on a Saturday than are sold for tickets on a Sunday.

The decrease in tickets sold between 2007 and 2008 impacted most heavily on mid-week performances on a Wednesday and Thursday, which sold 23% and 30% less tickets in 2008 than in 2007. Friday dropped by 8%, Saturday by 16% and Sunday by 19% between 2007 and 2008, while only Monday increased by 3%.

Purchase Patterns



NB: A household can be making more than 1 booking at more than 1 venue, which is why these percentages do not add up to 100%

In an individual year, a household booking for an arts event in Belfast is slightly more likely to be booking more than 4 weeks in advance (between 60% and 63% per year) than they are to be booking in the month leading up to an event (between 54% and 57% per year).

However, looking at the combined figures over all three years, nearly as many households booked in the month before (90,490 households, 64%) than booked over a month before (94,355 households, 66%). These figures would therefore suggest that there may be a higher level of re-attendance amongst those booking further in advance.

As in the main Audience Audit for 2008, more tickets are sold and more revenue generated more than 4 weeks before an event takes place (57% of tickets overall and 63% of revenue generated).

The week leading up to an event is the most prominent for ticket sales than any other week in the month before an event, with 20% of tickets sold and 15% of revenue generated. This is less than the results from the Audience Audit 2008 however, where 27% of tickets were sold and 19% of revenue was generated in the week leading up to events at venues across Northern Ireland. However, the addition of the Belfast Waterfront and Ulster Orchestra data into this dataset may have affected this figure.

Tickets Sold	2006 Tickets	% 2006 Tickets	2007 Tickets	% 2007 Tickets	2008 Tickets	% 2008 Tickets	Overall Tickets	% Overall Tickets
On the Day	31,623	6%	37,020	6%	29,223	5%	97,866	6%
Day Before	17,892	4%	19,461	3%	15,993	3%	53,346	3%
2 - 7 Days	53,424	11%	71,765	11%	59,451	11%	184,640	11%
8 - 14 Days	40,870	8%	55,895	8%	50,936	9%	147,701	9%
15 - 28 Days	70,496	14%	96,431	14%	71,945	13%	238,872	14%
Over 4 weeks before	277,968	56%	376,978	57%	331,614	59%	986,560	57%
No Booking Time	3,069	1%	8,199	1%	2,342	0.4%	13,610	1%
Total	495,342	100%	665,749	100%	561,504	100%	1,722,595	100%

Revenue Generated	2006 Revenue	% 2006 Revenue	2007 Revenue	% 2007 Revenue	2008 Revenue	% 2008 Revenue	Overall Revenue	% Overall Revenue
On the Day	\$315,096.48	4%	\$388,331.59	4%	\$307,509.55	3%	\$1,010,937.62	4%
Day Before	\$180,287.33	2%	\$239,154.19	2%	\$206,081.82	2%	\$625,523.34	2%
2 - 7 Days	\$651,393.87	9%	\$974,644.76	9%	\$886,509.72	9%	\$2,512,548.35	9%
8 - 14 Days	\$537,666.29	7%	\$828,512.23	8%	\$833,905.91	8%	\$2,200,084.43	8%
15 - 28 Days	\$929,498.60	13%	\$1,543,425.74	14%	\$1,257,135.65	13%	\$3,730,059.99	13%
Over 4 weeks before	\$4,609,709.47	64%	\$6,907,169.49	63%	\$6,298,816.92	64%	\$17,815,695.88	63%
No Booking Time	\$24,773.26	0.3%	\$115,534.04	1%	\$24,414.50	0.2%	\$164,721.80	1%
Total	\$7,248,425.30	100%	\$10,996,772.04	100%	\$9,814,374.07	100%	\$28,059,571.41	100%

Booking patterns at Belfast arts organisations are consistent across the three years analysed, with a maximum variance of 3% between years.

Arts attendances are therefore planned and booked in advance rather than being a spur of the moment decision to attend. This booking typically takes place either more than a month in advance or on the week the event takes place. If someone still hasn't booked by the day before the event, the low percentage of bookings the day before would suggest that they are more likely to wait until the next day and get them on the door.

Conclusions

- 8 arts organisations in Belfast sold 1,722,595 tickets worth £28,059,571.41 between 2006 and 2008.
- 21% of households in Northern Ireland booked for the arts in Belfast between 2006 and 2008.
- 10% of households in Northern Ireland booked for the arts in Belfast in 2006, 12% booked in 2007 and 11% booked in 2008.
- Ticket revenue peaked in 2007, having risen 52% on 2006 figures. However, in 2008, revenue figures fell by 11% on 2007 levels.
- 22% of households booking for the arts between 2006 and 2008 were from the Ageing Suburbanites Mosaic NI group. 16% of households were from the Wealth and Wisdom group, 16% were from the Better Off Families group and 10% were from the Farming Communities group.
- The percentage of households attending each year in each Mosaic NI group only varies by an average of 2% each year.
- Compared to the population, Wealth & Wisdom, Better Off Families, Ageing Suburbanites and Students and Singles all show an above average propensity to book for arts events.
- Belfast arts organisations penetrated at least 47% of Wealth & Wisdom households, 35% of Better Off Families households, 26% of Ageing Suburbanites households and 26% of Students and Singles households in Northern Ireland between 2006 and 2008.
- Over the 3 year period, a household was worth an average of £164.82 to the arts in Belfast.
- A household in the Mosaic NI group Wealth and Wisdom was worth the most in average ticket revenue per household at £211.76 across the 3 year period.
- Theatre 'Entertainment' was the most prominent artform genre between 2006 and 2008, attracting 37% of household bookers for the arts and representing 29% of tickets sold and 25% of revenue generated.
- Musicals were the highest yielding artform genre, with each ticket generating £23.01 on average.
- December is the most important month for ticket sales.
- December and October are the most important months for generating revenue.
- October is the most important month on average for generating high volumes of visits.
- February, March, October and December are the most important months for getting larger number of households to book.
- July was generally the least important for tickets, revenue, visits and households.
- On average, 20% of tickets are sold for events on a Friday each year, while 25% of tickets are sold for events on a Saturday each year.
- 57% of tickets were sold and 63% of revenue was generated more than 4 weeks in advance of a performance, while 20% of tickets sold and 15% of revenue generated was in the week leading up to a performance.

Audience Data UK Classifiers

Audience Data UK (www.aduk.org) is a joint project involving the four UK Arts Councils, which commissioned a set of common artform classifications to enable analysis that is consistent between arts organisations and builds up a detailed picture across the whole of the UK to support further analysis and benchmarking. These classifiers have now been adopted for use by Arts Council NI and Audiences NI for reporting purposes.

Glossary

Household: A household comprises one person living alone, or a group of people (not necessarily related) living at the same address with common housekeeping - that is, sharing either a living room or sitting room or at least one meal a day. (NI Census)

Mosaic NI: Mosaic NI is a Northern Ireland specific consumer classification system, which segments consumers into 9 groups based on a mixture of census information and lifestyle surveys. Any data which includes a post code can be classified using the profiling software, providing demographic information specific for each group, and allowing records to be geographically mapped.

Penetration: A comparison of one amount against a total figure to give a percentage. In the case of audience specific data, the extent to which a facility is attracting actual users or attenders from within its relevant identified markets. (An A-Z of Commonly Used Terms and Protocols relating to Box Office and Audience Data, Stephen Cashman/Audience Data UK, 2005)

Performance: An individual show within a run of performances.

Post Code: A code used to identify a postal address, made up of a combination of letters and numerals. All Northern Ireland post codes begin BT followed by a one or two digit number, a space, a one digit number and two letters. These typically relate to around 15 residential addresses or one large user, such as a business address.

Revenue: The amount (in Pounds £) paid per single ticket to see a performance.

Ticket: A ticket is a single seat sold for a single event.

Visit: A visit is where a booker attends a venue to see a single performance of a show along with any other person they have booked tickets for. Regardless of the size of the party, this constitutes 1 visit. However, if the same customer reattends at the venue, even if it is to see the same show, this constitutes a separate visit.



About Audiences NI

Audiences NI was established by the Arts Council of Northern Ireland in August 2004 to help grow and diversify audiences for the arts and cultural sector in Northern Ireland. The agency is one of 12 audience development agencies operating throughout the UK, providing vital audience development support to organisations through the provision of market intelligence, training, projects, research and forums.

Since its inception, Audiences NI has been carrying out research on audiences for the arts in Northern Ireland, including demographic and geographic profiling using Mosaic NI, trend analyses on box office data and customer focused online surveys for its members.

Report compiled by Chris Palmer, Research Officer, Audiences NI.
For more information on Mosaic NI or interpreting the results of this analysis, email research@audiencesni.com or phone **028 9043 6480**.

www.audiencesni.com

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