



SALES DATA REPORT 2013-16

EXECUTIVE SUMMARY AND HEADLINES

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RG
ARTS

Contents



INTRODUCTION

- 3 Introduction by Fiona Allan
- 4 Introduction by David Brownlee

5 HEADLINES

6 OVERALL FINDINGS & EXECUTIVE SUMMARY

8 SUMMARY TOURING REPORT

SUMMARY GENRE REPORTS

- 9 Comedy
 - Concert Classical
 - Concert Other
- 10 Concert Rock Pop
 - Concerts as a whole
 - Dance Ballet
- 11 Dance Contemporary
 - Dance Other
 - Dance as a whole
 - Family Theatre
- 12 Musical Adult
 - Musical Family

- 12 Musicals as a whole

- 13 Opera
 - Pantomime
 - Play

VENUE TYPES

- 14 a: Main auditoria of larger producing theatres
 - b: Principally presenting theatres with a capacity of over 1,000
 - c: Concert halls
 - d: Auditoria of principally presenting theatres with a capacity between 500-1,000
- 15 e: Main auditoria of principally producing theatres with capacity over 160
 - f: Auditoria of principally presenting theatres with a capacity between 200 and 500
 - g: Smaller space, programmed frequently
 - h: Smaller space, programmed infrequently

17 METHODOLOGY NOTES

Introduction

Introduction by Fiona Allan, President of UK Theatre



Here's a report that gives our sector reasons to be cheerful. For five years UK Theatre venues have been supplying sales data on a week-by-week basis, which allows UK Theatre to measure the health of theatre audiences and finance, so reinforcing the importance of the industry in challenging times.

This report goes beyond the impressive annual figures and comparisons to tell a nuanced and comprehensive story about how the industry has evolved in the four years from 2013-16.

And there are some positive headlines that show growth and resilience. Income recorded at UK Theatre venues grew by 18%. The number of performances increased, and the average number of people attending shows grew. From this we conclude that the market for theatre appears to be growing, the demand for individual performances is growing and the price the public is willing to pay is increasing. This is very welcome news - a vital vote of confidence for the sector during testing times.

Let's be proud of our resilience, and use this as a moment to reflect on how we're achieving it. These figures tell a story of change. With total box office income for 'concerts' up by 47%, and by 42% for 'family theatre' our resourceful theatre managers are responding to the evolving tastes of audiences.

After two years of growth, 2016 saw a drop in income from plays - of over £10 million. We could assume that the audience's appetite is there - the growth in box office income from plays continued in producing houses - but the lower sales in presenting houses certainly gives us food for thought.

It is clear that touring continues to be vitally important: 60% of 2016's overall box office coming from touring shows. Figures also show that the major 'producing houses' are relying more now on a mixed ecology model of presenting both home produced and touring shows, meaning it is imperative to the sector that levels of touring are maintained.

We're publishing this report in November 2017 and - whilst there's a way to go until the end of the financial year - more recent figures may indicate a fluctuating landscape. The latest overall figures for 2017 are showing some good growth, including plays and panto. But it's also clear that attendances at major presenting venues are down, and there's a drop in sales for musicals. We'll know and share more in 2018.

Collecting this data from UK Theatre member venues gives us an insightful picture of trends. It's granular data that will allow theatre managers to track their performance against a benchmark of their peers, and provide crucial context for Boards and investors.

This data provides an essential tool for us to use on UK Theatre members' behalf. It helps us make the case for investment in theatre at a regional and national level, and reminds us all of the importance of the industry in challenging times.

Introduction by David Brownlee, Vice President for the UK and Europe at TRG Arts



In theatre (as in almost every other area of life), if you don't measure it, you can't manage it.

In North America, TRG Arts helps over a thousand arts organisations capture and analyse ticket sales data. This provides valuable intelligence to individual organisations, regional community networks and national policy makers.

Our job as consultants is to translate what we see in the data we analyse into practical action that will help our clients improve their performance and become more sustainable. The UK Theatre sales data provides four years of incredibly comprehensive and granular data. How can venue managers use this to improve their performance?

The comprehensive suite of reports accompanying this Executive Summary give detailed analysis for eight different types of venues based on their size and what kind of work appears on their stages. As a venue manager who is seeing audiences for classical concerts in decline, it's far more useful to know what are the industry trends in auditoria like yours than just an overall picture for genre across all theatres.

As we have delved deeper into the data it's become clear that trends have varied considerably in different parts of the sector. The headline figures for Drama for example seem to suggest considerable year-on-year variation in performance, but for some venue types growth had been consistent throughout the study period.

Comparing your data to the trends for similar venues in this suite of reports allows you to answer a host of questions that could help you focus your activity and resources. If your average yield achieved has grown by 10% over the last four years, is this good or bad compared to your peers? If your programming mix has remained constant for the last four years and you think you need to change, where are other similar venues seeing growth? If your average yield achieved for musicals is 20% higher than for drama, is this normal for a venue like yours? Are you underpricing either genre?

Using these reports you can answer your Board's concerns about whether your plateaued sales for comedy is due to a local or national issue and suggest three other genres where similar organisations are seeing stronger performance. You can demonstrate in funding applications areas where you perform significantly better than the national norm and where you need support to develop new audiences. You can align your staff around key metrics and targets that could transform your business.

Data isn't for geeks, it's for managers who want to make decisions based on evidence not anecdote. TRG Arts hopes that analysis in this suite of reports will lead to many more wise decisions at UK Theatre venues that will improve performance and build your resilience.

Headlines



Across all respondents, growth was seen for all key indicators during the study period with more productions, more performances, more tickets sold, greater income, fuller houses and higher prices paid.



There was an increase of over £32 million in the annual income from musicals. In 2016 39p in every £1 taken at the box office was for a musical.



In 2016 Concerts saw a 47% increase in box office revenue. This was higher than for any other genre, overtaking pantomime as the highest performing genre across UK Theatre venues.



Combined income for dance as a whole increased by 3% (less than the rate of inflation). Dance classified as 'other' (not contemporary or ballet, including a large number of Strictly Come Dancing spin off tours) performed well with income rising 161%.



Major producing houses increased their cumulative income by 44%. This type of venue experienced the biggest growth in percentage terms.



In 2016, while tours accounted for only 10% of recorded productions, they generated 60% of overall box office income.



Cumulative box office income grew by 18% from 2013 to 2016. This was thanks to the combination of 4% more tickets being available, 1.3% fuller houses and a 10% increase in the average price paid for a ticket.



While there was strong growth in ticket sales for plays in 2014 and 2015 much of this was reversed in 2016. This was due to lower sales in presenting houses. The growth in box office income from plays continued in producing houses.



Box office income for family theatre also increased significantly. Income went up by 42%.



59p in every £1 of all box office income was taken by large presenting houses in 2016.



Pantomime has overtaken comedy as the genre that fills the most seats. In 2016, 75% of the available tickets for panto were sold.

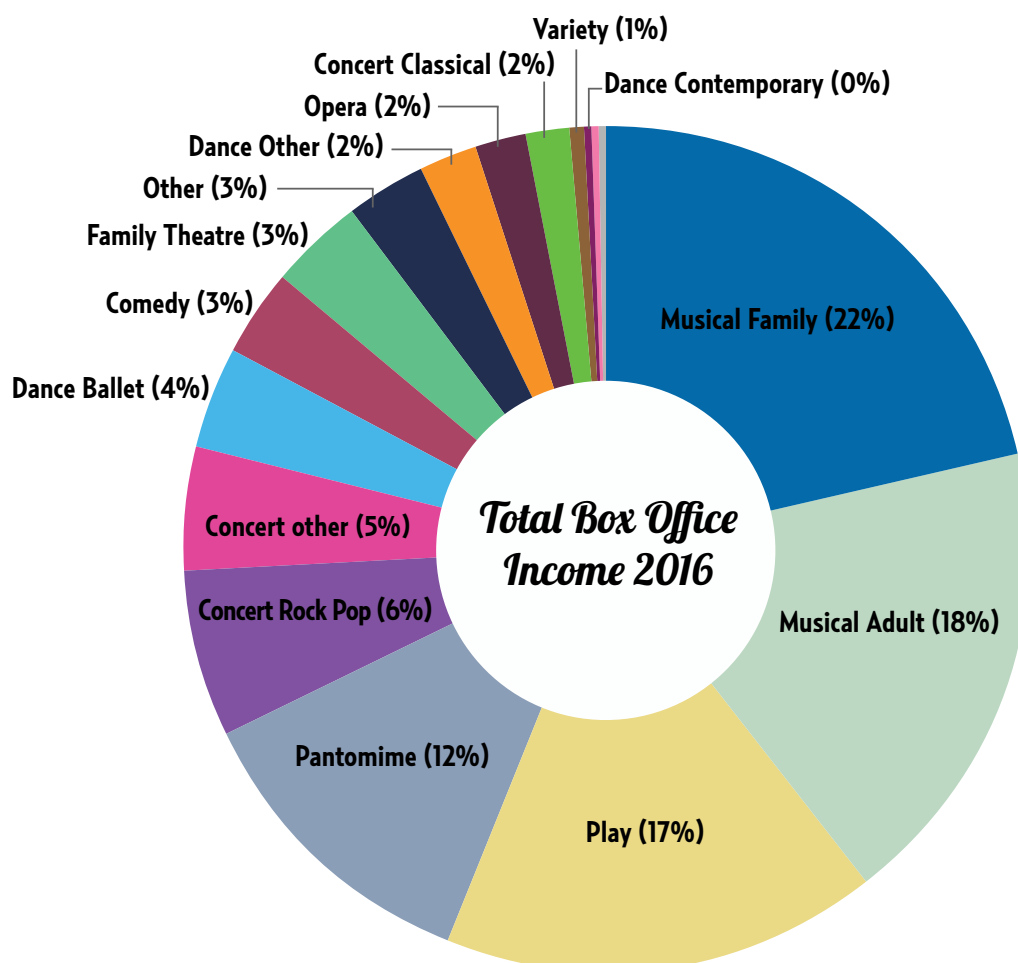


The growth in average price paid ranged from 5% to £32.54 for musicals, 9% to £20.94 for plays and 15% to £20.77 for pantomime

Overall Findings and Executive Summary

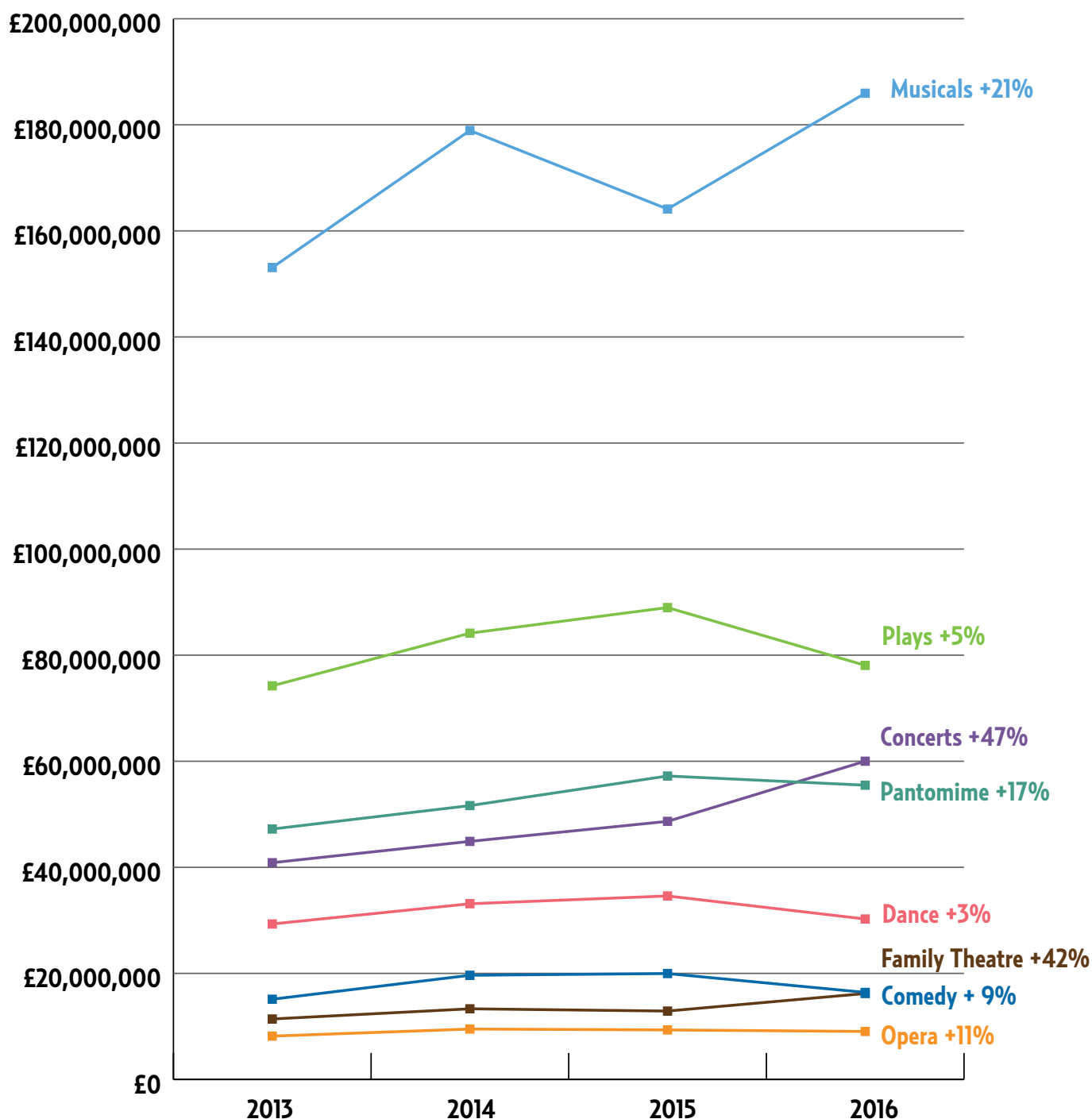
	Number of productions	Number of performances	Total tickets sold	Total box office income	%age capacity achieved	%age cash value achieved	Average ticket price asked	Average ticket price achieved
2013	4,933	40,889	17,615,460	£396,912,018	59%	60%	£22.08	£22.53
2014	5,280	43,952	19,084,886	£455,317,021	59%	61%	£23.29	£23.86
2015	5,237	43,308	19,189,156	£455,253,946	59%	59%	£23.76	£23.72
2016	5,496	42,638	19,020,277	£469,991,837	61%	61%	£24.68	£24.71
Change 2013-16	+563	+1,749	+1,404,818	+£73,079,819	+2.0%	+0.9%	+£2.60	+£2.15
Change 2015-16	+259	-670	-168,879	+£14,737,892	+1.3%	+1.4%	+£0.92	+£0.99

From 2013 to 2016, an 18% increase was recorded for total box office income across UK Theatre venues who take part in this sales tracking project. The five most financially important genres in 2016 were musical family, musical adult, play, pantomime, and concert rock pop. Together, they accounted for 74% of all box office revenue.



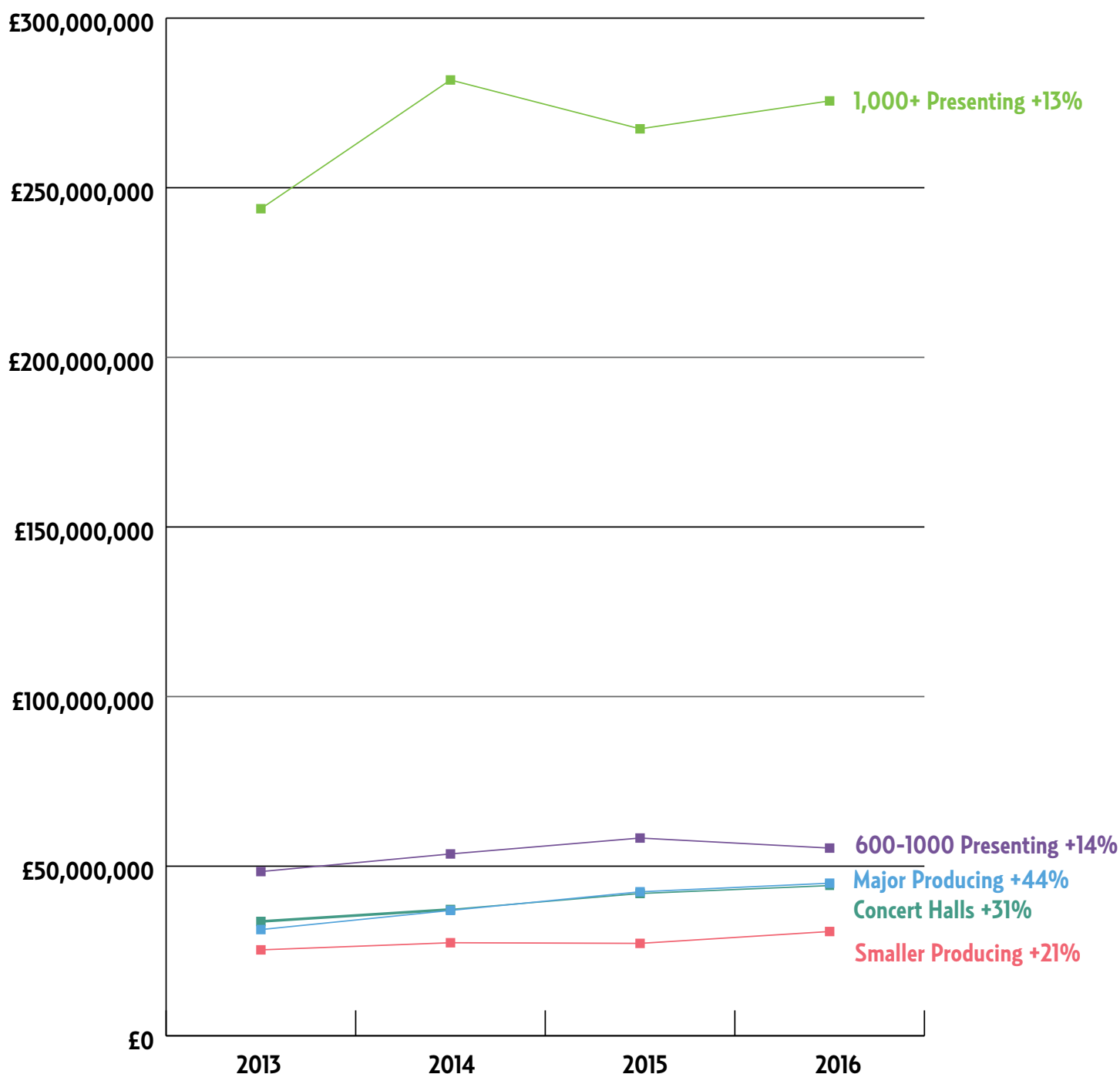
Each of these genres is examined in detail individually in this suite of reports. For this summary we have combined genres within concerts, musicals and dance to create a summary of income trends that is easier to follow:

Total Box Office Income 2013- 2016



Income from musicals has grown by almost £33 million, although the figures vary considerably from year to year. The highest growth in percentage terms is concerts, followed by family theatre.

Total Box Office Income 2013- 2016



The largest presenting houses accounted for between 59% and 62% of all box office income every year. In percentage terms their growth did not match any of the other four largest types of venue.

Summary Touring Report

A more detailed report is [available here](#).

Sales data for 'touring' and 'non-touring' productions in 2016 shows that while tours only accounted for 10% of recorded productions, they generated 60% of overall box office income.

Summary Genre Reports

DETAILED INDIVIDUAL REPORTS ARE AVAILABLE FOR ALL THE FOLLOWING GENRES:

Comedy

After rises in the two previous years, 2016 saw a dip in ticket sales and income for Comedy, bringing it back to figures similar to 2013.

- The average price paid for a ticket rose by 9%.
- Principally presenting theatres with a capacity of over 1,000 (b) and concert halls (c) accounted for 50% of ticket sales for comedy in 2016, although both venue types saw substantial drops in sales compared to previous years.

Concert Classical

- Income from classical concerts rose by a third and the numbers of tickets sold rose by 8%.
- The main factors in the increase in income were more performances taking place in principally presenting theatres with a capacity of over 1,000 (b) and a rise in average price paid of 24%.

Concert Other

- Income from concerts other than classical and rock and pop rose by 46%.
- This growth was driven by a 24% increase in the number of performances and an 18% increase in the average price paid per ticket.
- Box office achieved income in 2016 was very similar for principally presenting theatres with a capacity of over 1,000 (b) and concert halls (c). 'other' concert income has risen significantly for both these venue types and for auditoria of principally presenting theatres with a capacity between 500-1,000 (d).

Concert Rock Pop

- Income has grown 50% from rock and pop concerts.
- In 2016 there were 25% more performances attended in total by 36% more ticket purchasers paying on average 11% more than in 2013.
- Due to the sale of 200k more tickets than in 2015, principally presenting theatres with a capacity of over 1,000 (b) accounted for 46% of all ticket sales in 2016. Prior to 2016 this venue type was recording a decline in sales while sales grew steadily at concert halls (c) and auditoria of principally presenting theatres with a capacity between 500-1,000 (d).

Concerts as a whole

- Over half a million more tickets were sold for concerts at UK Theatre venues in 2016 compared to 2013
- Average yield achieved rose by £3.29.

Dance Ballet

- Figures for different dance genres should be treated with some caution as classification between 'ballet', 'other' and 'contemporary' is subjective.
- A 14% fall in income was reported for Ballet, with a fall in 22% of performances and 23% in tickets sold.
- Average ticket prices paid for 'dance ballet' rose by 11% across the study period.
- While principally presenting theatres with a capacity of over 1,000 (b) accounted for 82% of all ticket sales in 2016, this was a lower proportion than in previous years as ticket sales (and income) in these venues had fallen steadily.

Dance Contemporary

- Figures for different dance genres should be treated with some caution as classification between 'ballet', 'other' and 'contemporary' is subjective.
- The figures for dance contemporary fluctuate substantially between years. Sales in 2013 and 2015 were roughly double what was recorded in 2014 and 2016.
- The overall fluctuations are largely driven by the number of dance contemporary performances at principally presenting theatres with a capacity of over 1,000 (b). In 2013 and 2015, over £3M of sales for dance contemporary were recorded at these venues, while in 2016 sales only just exceeded £1M.

Dance Other

- Ticket sales and box office income for dance other more than doubled in a single year (2014) when Riverdance and a large number of Strictly Come Dancing related shows were touring. Income rose slightly in 2015 and then dipped in 2016.
- Average ticket prices paid for dance ballet rose by 39%.
- The growth in sales and income for dance other was driven almost entirely by principally presenting theatres with a capacity of over 1,000 (b). Income grew from £1.6M in 2013 to £7.6M in 2014 for this genre.

Dance as a whole

- While the figures for sub genres within dance show significant differences, combined figures for dance as a whole saw less dramatic changes.
- Income grew by 3% despite a 10% fall in the number of performances and a 7% fall in ticket sales.

Family Theatre

- Despite a small fall in the number of performances, there has been a 42% rise in income for family theatre, with the majority of this coming in 2016.
- Ticket sales have increased by 21% and the average price paid by 17%.
- The growth in sales and income for family theatre in 2016 was largely driven by principally presenting theatres with a capacity of over 1,000 (b) where income grew from just under £3M in 2015 to £5.5M in 2016.

Musical Adult

- Sales and income dropped in 2014 but returned to similar levels to 2013 in both 2015 and 2016. Income was very similar at the start and end of the study period.
- Ticket sales fell by 9% and the average price paid for a ticket rose by 10%.
- The fluctuation across years was almost entirely due to the variation in performance of principally presenting theatres with a capacity of over 1,000 (b) which accounted for £70M of the £85M income achieved in both 2013 and 2016.

Musical Family

- There was substantial variation with particularly strong sales in 2014. There were 87% more performances in 2016 than 2013 due to growth in a variety of different types of venue.
- The average price paid for a ticket fell by 5% across the study period. However, this was still the most paid for any genre.
- While principally presenting theatres with a capacity of over 1,000 (b) still account for 82% of income for family musicals, the study period saw substantial growth in income from this genre in producing houses.

Musicals as a whole

- Overall the number of performances of musicals grew by 23%, ticket sales increased by 16% and box office income grew by 21%.
- The average price paid for a musical ticket rose by 5% to £32.54.

Opera

- Ticket sales for opera rose by 15% in 2014 when there was a 19% increase in the number of performances. Despite falls in numbers of performances in 2015 and 2016, income has continued to exceed £9M and income has grown by 3%.
- The average price paid for an opera ticket has risen by 8%, and opera remains the highest price paid art form after musicals.
- While principally presenting theatres with a capacity of over 1,000 (b) accounted for 65% of all opera tickets sold in 2016, there has been strong growth in sales at auditoria of principally presenting theatres with a capacity between 500-1,000 (d).

Pantomime

- The numbers of performances and ticket sales for pantomime rose in 2014 and 2015 before dipping back to levels similar to 2013 in 2016. Ticket sales have grown by 2% and income is up by 17%.
- The average price paid for a pantomime ticket has risen by 15%.
- Principally presenting theatres with a capacity of over 1,000 (b) and auditoria of principally presenting theatres with a capacity between 500-1,000 (d) together accounted for 75% of all pantomime income in 2016, but it was these venue types that saw a decline in cumulative income while other venue types saw growth.

Play

- Following two years of growth, in 2016 plays saw a decrease in total box office income of over £10M. There were also fewer tickets sold by over 500,000 and almost 800 fewer performances compared to 2015.
- The average price paid for a play ticket has risen by 9%.
- Despite selling the largest proportion of tickets in every other year of this study, 2016 saw a drop of over 500k in the total tickets sold by principally presenting theatres with a capacity of over 1,000 (b) which decreased their overall share of ticket sales to 20%. Main auditoria of larger producing theatres (a) saw ticket sales rise by £200k, including growth in 2016.

DETAILED INDIVIDUAL REPORTS ARE AVAILABLE FOR ALL THE FOLLOWING VENUE TYPES:

a: Main auditoria of larger producing theatres

- Substantial growth was recorded for these auditoria in performances, ticket sales and income.
- Average price paid for a tickets rose by 13%.
- Plays were the principal genre driving the improved results for these auditoria.

b: Principally presenting theatres with a capacity of over 1,000

- Little change in performances and audience numbers were reported during the study period, but income rose by £28 million.
- Performances for adult and family musicals fluctuated over the years of the study period.
- 2016 proved a poor year for plays following steady growth in the two previous years.

c: Concert halls

- Concert halls reported an increase in attendance and over 30% increase in income.
- Average price paid for a ticket rose by 17%.
- Comedy and concert other were the main genres driving the growth in attendance and income.

d: Auditoria of principally presenting theatres with a capacity between 500-1,000

- These auditoria reported growth in audiences and income in 2014 and 2015, but 2016 proved a far more challenging year due to a big drop in the number of performances.
- Average price paid has grown by 9%.
- The principal reason for the poorer performance in 2016 was down to falls of around 100k in ticket sales reported for both plays and pantomime.

e: Main auditoria of principally producing theatres with capacity over 160

- Box office income grew by over 20% due to an increase in ticket sales and a 16% rise in the average amount spent on a ticket.
- Despite a drop in the number of performances, plays accounted for the majority of the growth in box office income.

f: Auditoria of principally presenting theatres with a capacity between 200 and 500

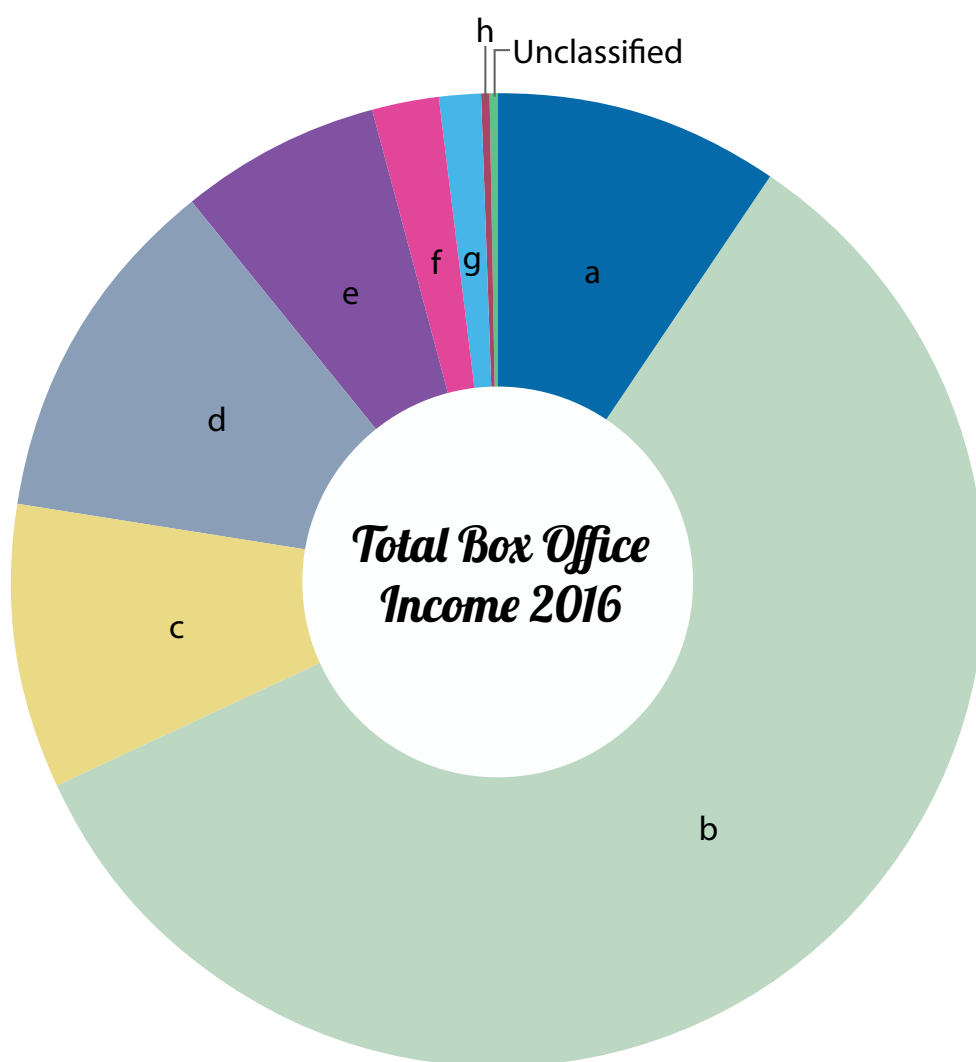
- Box office income grew by over 20% due to an increase in ticket sales and a 16% rise in the average amount spent on a ticket.
- Despite a drop in the number of performances, plays accounted for the majority of the growth in box office income.

g: Smaller space, programmed frequently

- 19% increase in box office income has been driven principally by a growth in ticket sales at the larger of these venues.
- Average ticket price achieved has risen by 8%.
- The majority of the uplift in income has been in plays and comedy.

h: Smaller space, programmed infrequently

- Annual figures are erratic, reflecting infrequent programming.
- Strong growth in 2016 was due to a small number of musical family productions.
- The average price paid in 2016 (still just £13.79) was 54% more than the average price paid in 2013.



- a:** Main auditoria of larger producing theatres
- b:** Principally presenting theatres with a capacity of over 1,000
- c:** Concert halls
- d:** Auditoria of principally presenting theatres with a capacity between 500-1,000
- e:** Main auditoria of principally producing theatres with capacity over 160
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- g:** Smaller space, programmed frequently
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Methodology notes

In November 2015 the first ever comprehensive analysis of sales data by genre and venue type for UK Theatre (formerly TMA) venues was published. For over two decades data was collected from some TMA venues but this was neither a representative nor a comprehensive sample. This collection of reports adds data from 2015 and 2016 to provide a four-year trend analysis.

It should be noted that the data presented in this report still does not represent 100% of tickets sales in all UK Theatre venues. A few venues do not take part in the scheme and some venues do not complete returns every week. We estimate that we captured around 90% of activity at UK Theatre venues who are not members or affiliate members of the Society of London Theatre (SOLT). Most organisations who are members of both only provide returns to SOLT. A very small number supply both. Only around 1% of tickets sold in the UK Theatre sample in 2014 also appear in SOLT's statistics for the year.

UK Theatre venues are not representative of all theatres and concert halls in the UK. The requirement that UK Theatre Members abide by agreements and minimum pay rates negotiated with four unions means that many smaller or less well-resourced organisations would find membership unaffordable. This sample therefore includes a higher proportion of the better resourced theatres in the UK.

This report compares figures for 2013, 2014, 2015 and 2016. It should be noted that the sample is not constant. Membership of UK Theatre changes and UK Theatre has also had success in encouraging more of its members to provide more sales information more frequently.

One major ticketing software company's system does not report on what the income would have been if all seats were sold at the full price. For venues that use this system (usually large venues) we estimate the potential cash capacity based on the percentage of the seats that were sold (i.e. if we know 57% of seats were sold, we assume that 57% of potential income was achieved). We believe this could be overestimating the performance and having an impact on the averages for some of the larger venue types (particularly principally presenting theatres with a seating capacity of over 1,000 and auditoria of principally presenting theatres with a seating capacity of between 500 and 1,000).

This report would not be possible without the work undertaken at over 200 venues who take the time every week to submit their sales data to UK Theatre. Each show is genre coded not by the venue but by a member of the UK Theatre team (during the period of this study, Clare Ollerhead). This ensures that there is accurate counting of the number of shows and that they are coded in the same way. Coding shows remains a partially subjective process, but by doing it centrally a consistent approach is taken to decisions.

The reporting and analysis of the data in this document was conducted for UK Theatre by a team at international arts consultants TRG Arts: Sophia Hubeny, Jenny Male, Gemma Nelson and David Brownlee.