UK Performing Arts **Audience Survey**

Monthly Report

February 2023

Introduction

The UK Performing Arts Audience Survey commenced in April 2021. It was designed as a weekly snapshot to track changes in customer sentiment as venues re-opened (and closed again) due to the COVID pandemic.

In May 2022 sampling changed from inviting 5,000 participants to a weekly survey to 20,000 participants for a single monthly survey. The sample comes from the audiences of 37 participating venues around the UK:

Nation/Region	Venues
East	2
East Midlands	1
London	6
North East	1
North West	2
Northern Ireland	1
Scotland	7
South East	8
South West	6
West Midlands	2
Yorkshire and The Humber	1

The sample size from each venue is proportional to the number of tickets they sold in 2019. Monthly samples were generated randomly from patrons who have transacted at least once within the last three years. This was altered to at least once within the last five years in December 2022 to ensure we continue to reach the ‘pre-Covid’ audience.

Participating venues include both commercial and not for profit organisations. As well as both producing and presenting theatres of all scales, concert halls are also represented.

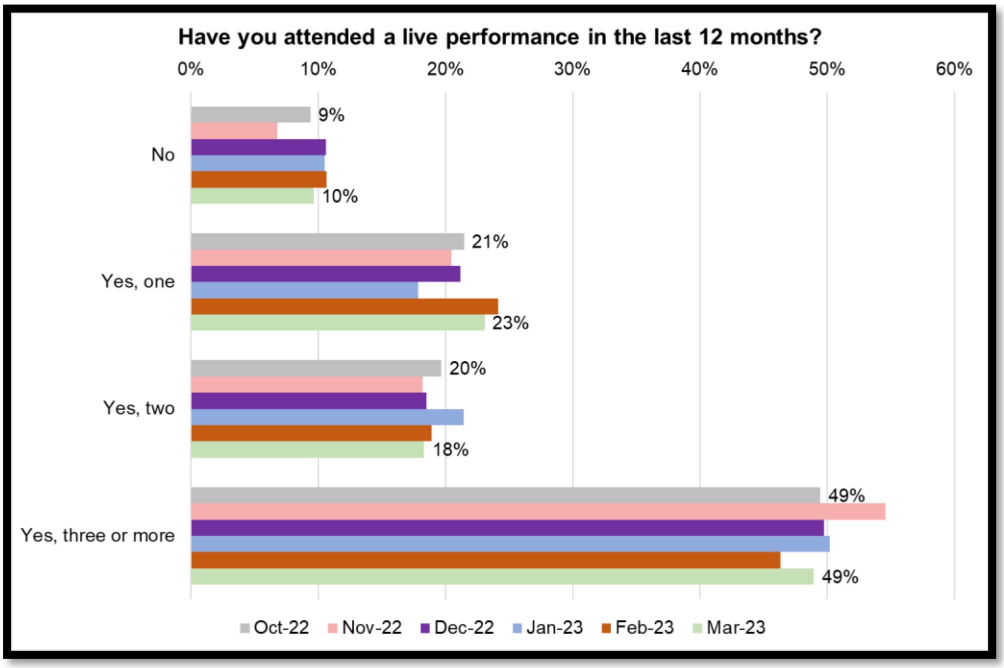
It should be noted that this is a survey of theatre (and concert) goers, not the UK adult population as a whole. We are also aware that respondents (generally around 5-6% of those invited to participate) are on average more recent and frequent bookers.

In October 2022 the questionnaire was substantially altered to allow the tracking of audience sentiment regarding issues beyond COVID. October 2022 therefore provides a baseline for six out of seven key questions that we are currently tracking.

The survey is managed by TRG Arts/Purple Seven on behalf of the 37 participating theatres. The questionnaire has been designed by Morris Hargreaves McIntyre and Data Culture Change. Analysis of responses and the writing of this report has been led by Data Culture Change.

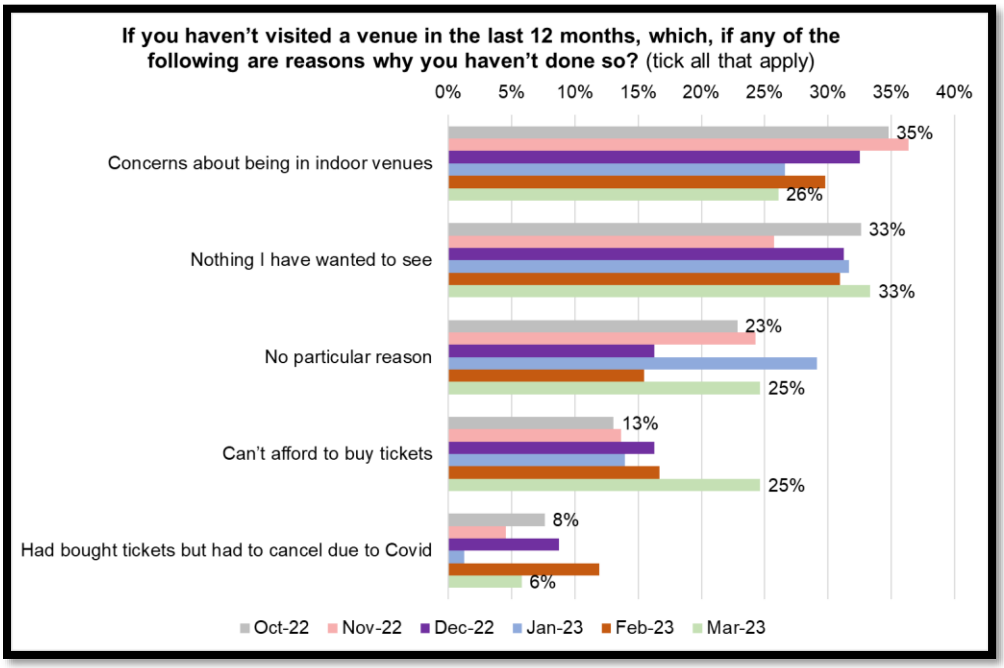
Monthly Tracker

Chart 1 – Attendance in the last 12 months



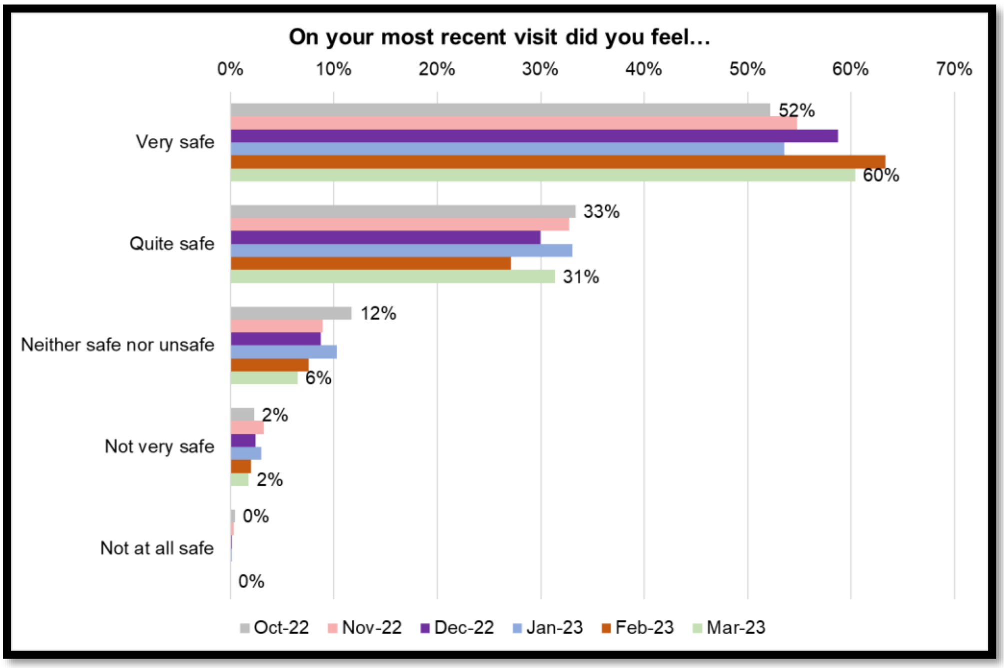
In March 2023, 715 responses to the survey were received. Almost half the respondents (49%) stated they have attended three or more performances in the last 12 months. 10% stated they had not visited a live performance in the previous year.

Chart 2 – Reasons for not returning



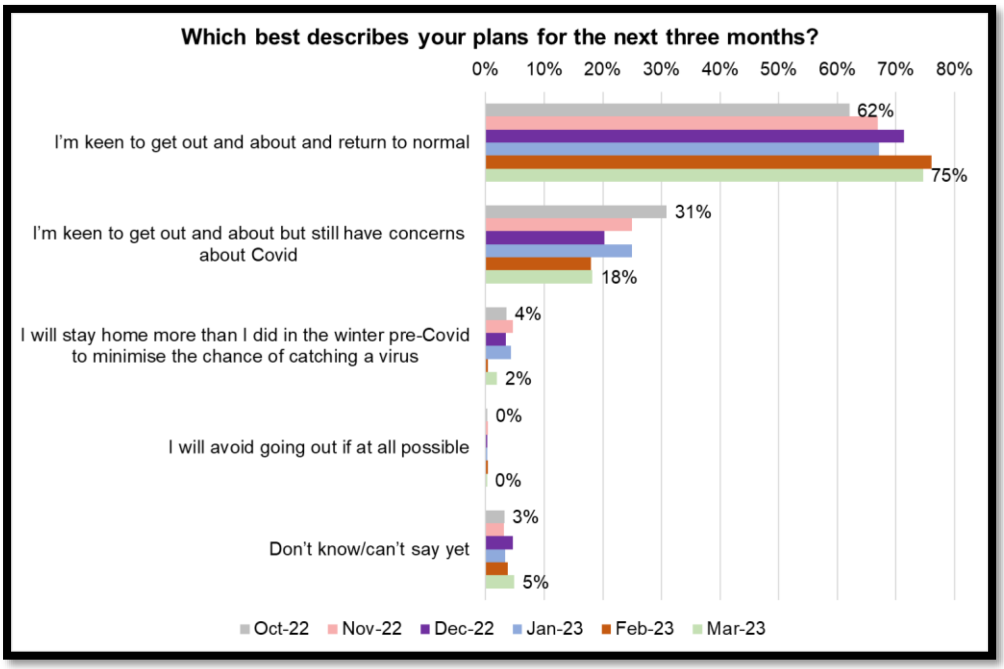
69 respondents in March shared one or more reasons for their not returning. In this very small sample, affordability continues to appear to be an increasing factor in not returning.

Chart 3 – Perception of Safety



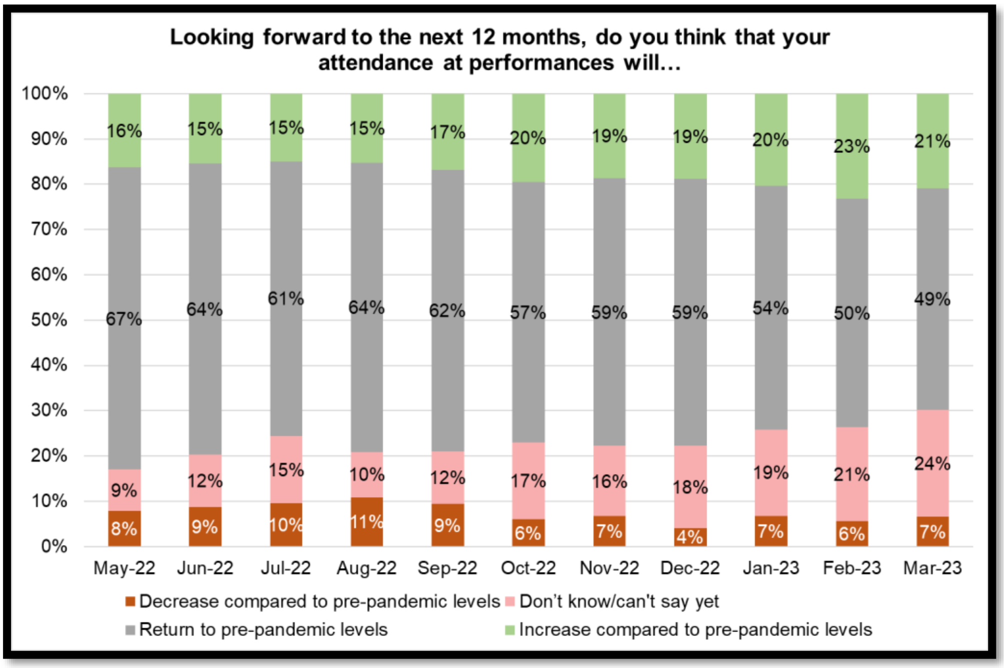
In March 2023 91% of respondents stated they felt ‘quite’ or ‘very safe’ on their last visit and no respondents stated they felt ‘not at all safe’.

Chart 4 – Plans for next three months



March 2023 is the second month where over three quarters of respondents are ‘returning to normal’ with no concerns about Covid.

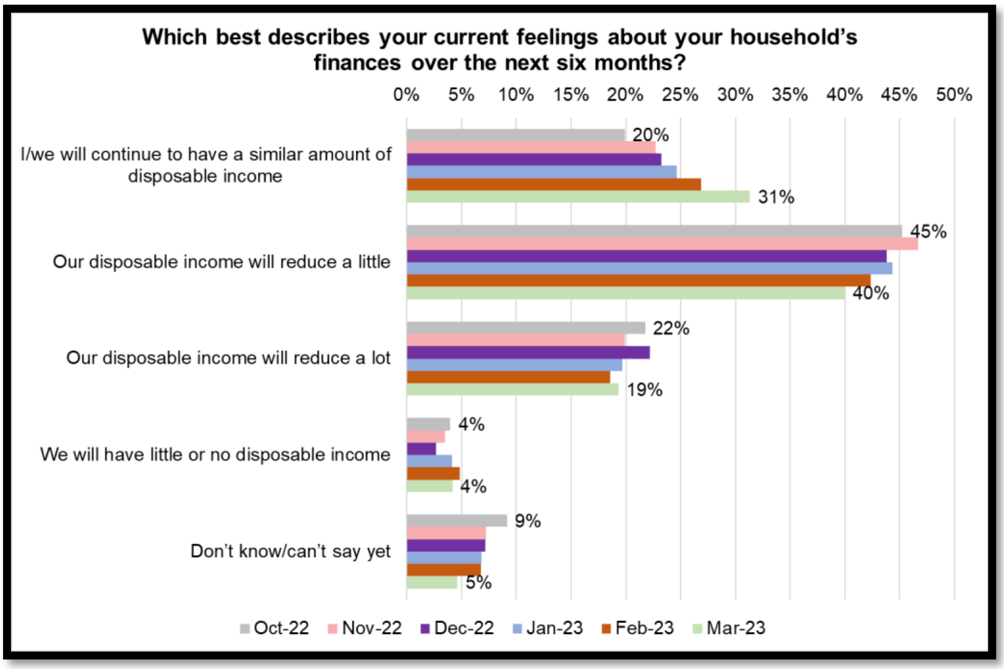
Chart 5 – Attendance expectations for the next 12 months



As we have asked this question consistently in the same way, we can follow the trend across the last 11 months.

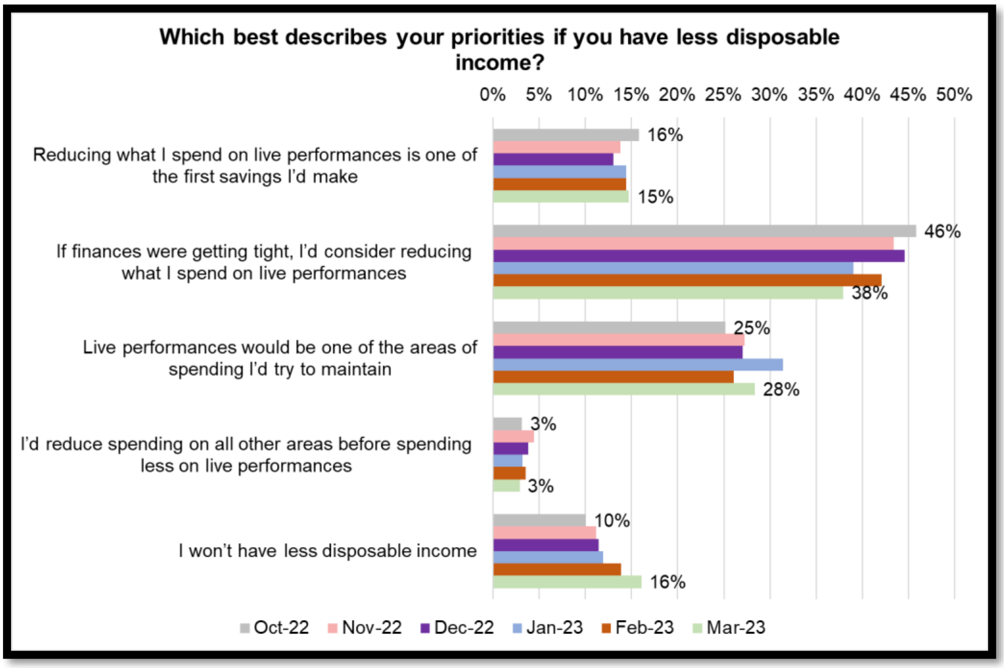
March 2023 saw the lowest proportion of respondents who expect to 'return to pre-pandemic levels' and the highest who were 'unsure' to date.

Chart 6 – Expectations regarding disposable income



The proportion of respondents who expect their disposable income to be similar in the next six months has grown every month since October 2022.

Chart 7 – Priorities for disposable income



47% of respondents currently state that they won't have less disposable income or would prioritise spending on live performances with a reduced budget. This figure has risen from 38% in October 2022.

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