



Walk-ups, advance bookers and non-bookers

A study commissioned by the Arts Councils of England, Wales, Scotland and Northern Ireland

Prepared by Tina Neill & Eric Orme
March 2006

Contents

1	Executive Summary	4
1.1	Methodology	4
1.2	Findings	5
1.3	Conclusion to Executive Summary	7
2	Introduction	8
3	Methodology	10
3.1	Phase 1 -The survey.....	10
3.2	Data analysis methodology.....	14
4	Survey Findings	19
4.1	Who responded to the survey.....	19
4.2	About the respondent	21
4.3	Frequency of visit	23
4.4	Motivation to attend	25
4.5	Ticket price	26
4.6	About the visiting party	27
	Advance bookers	29
4.7	Walk-ups.....	32
4.8	Non-bookers	34
5	Walk-ups data analysis findings	35
	What proportion of bookers are walk-ups?	35
	What proportion of sales do walk-ups bookers produce?	39
	What is the significance of failure to capture walk-up data?	42
	Are walk-up bookers more likely to be booking for the first time?.....	43
	Do walk-up bookers attend less frequently than advance bookers?.....	44
	Do walk-ups live closer to venues?.....	45

Are walk-up bookers a distinct group?.....	45
6 Conclusion	50
Appendix 1 – Participating venues and performances selected for sampling	51
Appendix 2 – Survey form	54
Appendix 3 – List of survey tables.....	58
Appendix 4 - Data analysis - list of other tables	65
Appendix 5 – Key Features of Mosaic Groups	67
Appendix 6 - Sample of venue forms	69
Appendix 7 – quality control and client approval	74

1 Executive Summary

This ground-breaking study presented the first opportunity to explore the long held uncertainties about the possibility of differences between those who book their tickets in advance for live performances (advance bookers), those who do not purchase their own tickets (non-booking attenders) and those who purchase their tickets on the door (walk-up bookers).

The fundamental aim of the study was to “establish whether there are significant differences between’ these three groups and to determine any factors arising from this that should be taken into account when carrying out data analysis projects.

The study was in two phases. The first was a survey which took place in 2004/5 and comprised 826 telephone interviews conducted with the three attender types across 42 performances at 18 venues in England, Scotland and Wales.

The second phase was data analysis which took place in 2005/06 and comprised the statistical analysis of transaction data relating to 211 events at 21 venues across the United Kingdom. This second element was necessary to strengthen the study with respect to walk-up bookers who were not well represented in the first phase.

1.1 Methodology

For the survey, telephone interviews were selected because they impact least on the visitor experience and allow the same approach to be used for all three attender types. A diverse range of 18 venues agreed to collaborate in the study, providing a sample of 42 events across two sample periods of two weeks each. Venues were asked to capture telephone numbers of 12 non-booking attenders and 12 walk-up bookers and to supply data for 100 advance bookers. The aim was to conduct the same telephone interview with 10 of each booker type for all events.

In the event, venues had some difficulty in capturing contact data for the target number of non-booking attenders and in particular, for sufficient walk-ups. In many cases the latter was due to the small number of walk-up bookers that events in the sample attracted.

A total of 826 interviews were conducted comprising 433 advance bookers, 291 non-bookers and 126 walk-up bookers. The sample size for walk-ups was weak and therefore data analysis in Phase two was commissioned to strengthen findings with respect to walk-ups.

The aim of Phase two was to establish what proportion of bookers are walk-ups, whether walk-ups are more evident at some types of event or venue than others, for what proportion of walk-up bookers data not captured, and whether walk-up bookers are a distinct group.

A diverse range of 25 venues agreed to permit access to their box office data stored on the Vital Statistics server. This represented 211 events with sales of 60,447 tickets. The data was analysed in SPSS at transaction and event levels.

1.2 Findings

This is a summary of the full findings of the study. It aims to give the reader a feel for the three different types of attender. A more detailed analysis is provided in the full report. Note that the summary draws on findings from both the survey phase and data analysis phase of the study. In a few cases the findings of the two phases are contradictory. This is due to differences in the two methodologies. Rather more information is provided about the walk-up booker as this formed the subject of both phases of the study.

The advance booker (approx. 36% of the audience)

The data analysis showed that the advance booker is more financially valuable to the venue than the walk-up booker. They tend to buy 37% more tickets in any transaction than walk-ups do and to pay one third more for each ticket than walk-up bookers.

The evidence from the survey would suggest that, within a group of all attenders, the advance booker is more likely to be female (67% of advance bookers were female compared to 60% walk-up bookers), and more likely to be aged over 45 (57.3% of advance bookers compared to 37% of walk-ups). Advance booking is likely to be his/her normal behaviour (83% of advance bookers book in advance 'Always' or 'Most of the time'). Advance bookers prefer to book in advance to ensure that they get the seats of their choice or to remove concern that there may not be any tickets left if they leave it too late.

Compared to the other attender types, more advance bookers are retired (34% compared to 24% of walk-ups) and fewer are students (4% compared to 8% of walk-ups). They are more likely to attend with their spouse or partner and more likely to pay top price for their tickets (26% compared to 19% of walk-ups).

The non-booker (approx. 62% of the audience)

The non-booker could not be described as habitual to the same extent as the advance booker. Only one in five 'never book' their tickets whilst 24% 'usually do'. Over half do 'sometimes' or 'occasionally'.

They are more akin to the advance booker than the walk-up booker and there are few marked differences between them. Not surprisingly, a higher proportion (26%) are first-time attenders compared to the other attender types (advance bookers 18% and walk-ups 16%) and a higher proportion are motivated to tag along with friends and family (12% compared to advance 4% and walk-ups 2%). Non-bookers are more likely to be female (72%) and more likely to attend with friends (41% compared to advance 32% and walk-ups 27%).

The walk-up booker (approx. 2% of the audience)

The data analysis phase addressed the issue of the significance of walk-ups. It was found that on average 4.9% of bookers in the sample booked their tickets within 1

hour of the performance and were therefore walk-ups. However, they paid less for their tickets than do other types of attender and therefore accounted for only 2.7% of box office income. It should be noted that the significance of walk-ups was much greater at small venues (7.2% of bookers) than at large ones (2% of bookers).

Walk-ups were more common at theatre events (6.7% of bookers) and less common at opera, classical music and dance events (3.7%).

As with the other booker types, it is important to recall that a group defined only by its booking behaviour is unlikely to be homogeneous. The sample of walk-up bookers will have included the relative newcomer to arts attendance as well as the well established regular. Mosaic classification of the walk-ups compared to advance bookers showed a remarkably similar profile with the main differences being a slightly younger age profile and more metropolitan characteristic to the walk-up bookers.

Some caution should be exercised in the interpretation of the Phase 1 survey findings because of the relatively small sample size, however most findings, including the finding that the walk-up is more likely to be slightly younger, employed, sophisticated and knowledgeable, are supported by the findings of the data analysis conducted in Phase 2.

The survey suggested that, compared to other attender types, a higher proportion of walk-ups are males. The survey and the data analysis suggested that a lower proportion are retired and that walk-up groups have a younger age profile with more aged between 25 and 44 (28% compared to advance 25% and non-bookers 17.5%). With an average booking size of less than two, the data analysis and the survey show that more attend on their own, whilst the survey suggests that fewer attend with their spouse or partner compared to the other attender types (25% compared to advance 32% and non-booker 27%). The data analysis reinforces the survey finding that more pay the lowest price for their tickets, although price is not the key driver to purchasing tickets on the door.

Although the survey suggested that fewer are generally attending the venue for the first time (16% compared to advance 18% and non-bookers 26%) the data analysis showed that the group of walk-up bookers includes a higher proportion of first-time bookers than does the group of advance bookers. Note the difference between attenders and bookers. Computerised box office systems only record bookings not attendances so it is not possible to directly compare results from the two methodologies.

Whilst the survey showed that a higher proportion of walk-up bookers tend to attend live performances weekly or more often, their frequency of attendance at the venues analysed was lower than that of advance bookers (this may be off-set to a degree by the lower data capture for walk-up bookers).

Although the greatest motivation to attend the performance for all attender types is the subject matter, walk-ups demonstrated their sophistication and knowledge in the survey as significantly more of them said that their main reason for attending is the

reputation of the company, director, choreographer, writer or performers (41% compared to advance 31% and non-booker 30%).

As more frequent attenders to performing arts in general, walk-ups seem to “know the score”. Unwilling to commit in advance, their decision to attend is more likely to be last minute and deliberate (rather than not getting round to booking in advance). They seem more likely to have the confidence in their ability to anticipate for which shows seats will be available at the last minute. Where they sit is not of particularly high importance to them. It is possible that as regular arts attenders, attending arts events is less of a special event for them and that they are therefore more likely to make a spur of the moment decision (30% said they made a last minute decision to attend).

The proportion of walk-up bookers with incomplete customer records is relatively high at 42% compared to 20% for advance bookers. However, because walk-ups are a relatively small proportion of bookers, they account for only one in ten records with missing data, and walk-up bookers with missing data make up only 2% of all transactions.

1.3 Conclusion to Executive Summary

The full report included many findings which will be of value to researchers or marketing managers seeking to develop their interpretation of the audience research they commission or conduct. Such readers will need to study the full report and adapt its findings to their own situation.

For the marketing manager the lessons are clear. That the advance booker is likely to buy more tickets and to pay more for them, so advance booking behaviour is to be actively promoted. Also, that they can relax if they have been worrying that their audience surveys are based on box office data which sample only bookers to the exclusion of the majority of the audience. The majority of the audience are bookers – they just don’t always book every time.

2 Introduction

In 2003, the Arts Councils of England, Scotland and Wales commissioned a study to review the current practice and identify strengths and weaknesses in data collection, data analysis and data usage within the arts sector. The report by Catalyst Arts, *The Thirst for Knowledge – Audience Data in the Arts* (November 2003) provided a valuable insight into the audience data needs of the arts and identified many of the limiting factors that are preventing funders and practitioners alike from making full use of information that is available.

The report recommended a series of projects and this has formed the basis of an overall programme of work. The aim of this programme, which is being undertaken by a number of consultants over two years, is to provide clarification and guidance for individuals and organisations who collect and analyse audience data.

The programme of work is being funded and commissioned by the Arts Councils of England, Scotland, Wales and Northern Ireland and is being overseen by the Audience Data UK Steering Group. This is made up of representatives of each of the Arts Councils, a representative from Network, the umbrella body for audience development agencies, and representatives from a range of arts organisations across the four countries.

The Arts Councils appointed Cultural Intelligence to undertake one of a series of individual projects forming Audience Data UK's programme of work.

The *Thirst for Knowledge* highlighted two potential weaknesses in research based on samples derived from box office records. These were that such samples often under-represent buyers who purchase their tickets on the door, and that samples based on box office data exclude the majority of the attenders i.e. those who do not purchase their own tickets.

Cultural Intelligence undertook a research study to identify any significant differences between these types of attender and if possible to propose approaches which can improve the future interpretation of box office data. The study was comprised of 2 phases. Phase 1 was a telephone survey of the three attender types and Phase 2 was analysis of box office data designed to respond to a weakness in the sample achieved in Phase 2.

Terminology

For the sake of clarity the following expressions have been used throughout this report:

'Advance bookers' - all attenders who book tickets in advance of one hour before the start of the event.

'Walk-ups or walk-up bookers' – people who purchase tickets within one hour of the start of event.

'Non-booking attenders' – people attending who were not responsible for booking their tickets

Respondents - Respondents to the survey who make up the sample of the three attender types to selected performances across the UK

Attenders - Attenders represent the respondents to the survey and the people they attended with

Acknowledgements

Cultural Intelligence would like to thank Megan Skinner and Phil Cave from Arts Council England and all the venues that participated in the survey for their valued support and co-operation.

Thanks are also due to all of the venues who generously allowed their data to be included in the sample for the data analysis. Also to Stuart Nicolle of Purple Seven Ltd for his technical support and to Angela Tillcock and Cathy Morris who supervised the second phase of the study on behalf of the Arts Data UK project.

3 Methodology

A project of this kind had not been undertaken before so there was no established approach to develop. The methodologies proposed were innovative and whilst at times they presented challenges, valuable findings emerged through the delivery of the study.

For Phase 1 of the study, Tina Neill had responsibility for project management and liaison with both the client and participating venues. Eric Orme managed Phase 2 of the study.

3.1 Phase 1 -The survey

For the survey, telephone interviews were selected as the most appropriate data collection method to ensure a consistent approach to researching all three attender types. The same basic interview was conducted with a very carefully selected sample of attenders in all three categories.

Telephone interviews were selected as the most appropriate methodology because:

- They represent minimum intrusion and therefore reduce the number of non-responses
- They have a lower impact on the visitor experience
- The same approach can be used for all three attender types
- They are a cost effective way of addressing geographical spread
- They overcome the difficulty represented by the limited time before or after an event, when face-to-face interviewing would be possible

The development of a balanced sample was important to the success of the project. The sample needed to take account of the following dimensions:

Artform

Four artform areas, as proposed by the client, were sampled: Opera/ballet, classical music, contemporary dance and theatre. Within these artforms, and as far as was reasonably possible, great care was taken to ensure that the events selected accommodated both contemporary and traditional styles.

Venue type and size

It was important to ensure that a range of venues of different type and scale were involved. Five venue types were selected as being the most appropriate and cross-representative for the sampling process:

- Art Centre
- Receiving theatre

- Concert Hall
- Producing Theatre
- National Touring House

To maximise research manageability and to achieve a cross-section of large, medium scale and small venues, five seating capacity categories were selected as follows:

- 300-500
- 500-800
- 800-1000
- 1000-2000
- 2000-3000

Geographical location

It was important to achieve a mix of rural and urban venues with representation from England, Wales and Scotland.

All venues selected for the sample had computerised box office systems as well as professional marketing and front of house operations. The sample did not include outdoor events or events held in non-arts venues. All events appeared in the organisation's main brochure and tickets had been on sale for at least four weeks prior to the event.

The process of developing the sample began with desk research in order to get a sense of the distribution of venues of different scale and type across the three countries. This information was sourced from the British Performing Arts Yearbook 2004/05 which listed approximately 1,300 venues in Great Britain. Based on the sample criteria outlined above i.e. geographical spread, venue type and scale, a long sample list of venues was randomly selected from the yearbook and submitted to the client for comment and approval.

Sampling periods and sample frame

There were two 2-week sampling periods. Initially these were planned for July and October 2004, but due to delays in the planning stages, these were put back to September and November 2004.

Based on feedback from the steering group, the list was amended and further desk research was undertaken to source venues who were staging events from the selected artforms within the sampling periods.

In order to enable segmentation of artform and attender type, a target of 100 responses from each target group was sought to produce a target sample of 1200.

Response to the telephone survey was maximised through an incentive. Respondents were offered the chance to enter a prize draw to win a £200 book token.

The number of events and venues needed to participate was dictated by the need to ensure a geographical spread, range of scale and the target response rate.

The target response rate for each event was 30 comprising 10 of each booker type.

Each venue was asked to supply the names and contact numbers of all advance bookers for each event and for as many walk-up bookers as possible. The aim was to randomise this data and select approximately 15 advance bookers and 15 walk-up bookers from each event to build the survey sample.

Venues were also asked to supply the names and telephone numbers of 12 non-booking attenders for each event who were willing to be interviewed. As these leads would have consented to participating in a telephone interview, a response rate of 83% was assumed (i.e. 10 interviews x 40 = 400).

In order to collect the sample of non-booking attenders each venue was requested to appoint one member of their front of house team to approach attenders at a designated event. Their task was to approach attenders on a random basis and obtain names and contact numbers from a sample of 12 people who agreed to respond to a telephone interview.

Venue recruitment and support

Eighteen venues across England, Wales and Scotland participated in the research. A total of 42 performances were sampled over two periods: 16 in September and 26 in November. See APPENDIX 1 for details of venues, scale, country, artform and event.

Venues were asked for their co-operation in selecting two to four events from their programme for sampling, supplying box office data relating to those events (making a special effort to capture data from walk-ups), and providing a member of staff at those events to capture contact data from 12 non-bookers. The venues were also asked to undertake some basic box office analysis of four previous similar events to determine the distribution of each attender type.

Besides the prestige of taking part in a groundbreaking study, in return for their co-operation each venue was offered a mini-report giving the findings relating to their venue, benchmarked against the full sample or their event type as appropriate.

On confirmation of their participation, venues were sent emails confirming the events and dates selected for sampling with the following attachments (see Appendix 6):

- Step by step guidelines
- Distribution of attender type form
- Collection of non-bookers form

The venues were provided with ongoing support during the sampling periods.

The level of venue co-operation and understanding of the project varied greatly. Some venues grasped what was wanted immediately and had no problem providing

the data, whereas others struggled. The degree of commitment in terms of allocating staff to collect walk-ups' and non-bookers' contact details also varied and, if anything, tended to slip during the second sampling period.

Some venues struggled to obtain the data in the format required. Perhaps the competency of box office staff to use their systems, and/or adequate briefing of box office staff from marketing staff had been overestimated.

It became apparent after the first sampling period that this target was not being reached (particularly where venues did not provide as many as 12 names). The reasons given varied from being short-staffed and staff sickness to box office staff being briefed to undertake the task but not completing it.

Insufficient data was received for walk-up bookers. It became apparent that in some instances there weren't many walk-ups (if any) for some events; however, co-operation in maximising data capture for this group of attenders varied.

The table below shows data for each sampling period and for each booker type as follows:

- data received from the venues
- target number of interviews
- number of interviews conducted

Booker type	September			November		
	Data rec'd	Target interviews	No. of interviews	Data rec'd	Target interviews	No. of interviews
Advance	619	160	157	447	260	276
Non-booker	168	160	117	229	260	174
Walk-up	85	160	48	119	260	78
TOTAL:		480	322		780	528

The total number of interviews was 67% of the target

Survey development and pilot

A telephone survey was drafted in consultation with the client. Once the survey had been finalised, CI piloted the survey with attenders to one of the events at the beginning of the first sampling period. The final survey was sent to the call centre ready for data collection. (See APPENDIX 2).

Interpreting the survey data

The extent to which the findings can be accurately extrapolated to a wider population depend upon two key factors: effective sampling and the proportion of respondents that respond in a similar way. Over 40 sampling points across eighteen venues throughout the UK strengthened the approach to sampling on this project.

There is a useful statistical rule for assessing the reliability of findings for randomly sampled surveys. Accuracy depends upon the number of people responding to a question and the proportion that answer in the same way.

For example, using the table below it is possible to see that for a sample of 100, 25% giving the same response allows us to be 95% confident that the truth lies between plus or minus 7.8% i.e. between 17.2% and 32.2%. This is known as the 95% confidence rule.

Response frequency	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Sample size 100	5.9%	7.8%	9.0%	9.6%	9.8%
250	3.7%	5.0%	5.7%	6.1%	6.2%
500	2.6%	3.5%	4.0%	4.2%	4.4%
1000	1.9%	2.5%	2.8%	3.0%	3.1%

The meanings of the terms used in the tables in this report are explained below:

- “Percentage” is the proportion of respondents to the question
- “Base” refers to the total number of surveys in the analysis
- “No reply” refers to the number of respondents who did not answer the question

3.2 Data analysis methodology

The data analysis phase was commissioned in order to strengthen findings relating to walk-up bookers. The aims of this phase were to consider:

1. What proportion of box office sales (both number of tickets and value) are walk-ups?
2. Are walk-ups more evident at some types of event or venue than others?
3. Within this group of walk-ups, from how many (again volume and value) is no significant data captured? Therefore does this group in any way skew venue data?
4. Is this group distinct from other bookers?

It was agreed that these points would be best addressed through analysis of box office data and that further research might be necessary if the data analysis suggested that item four could be significant to research based on Box Office data.

It was proposed that a solution be achieved using Purple Seven Ltd’s data warehousing solution called ‘Vital Statistics’. Vital Statistics is a new data analysis tool whereby venues can upload their box office sales data to a central server. The system provides a versatile tool for the analysis of the data. Its distinctive feature is that it provides a standardised format for data which allows comparison of data from a variety of computerised box office systems.

A further advantage of using Vital Statistics was that, because data is uploaded more or less automatically, it would not be necessary to bother the venues to output

data especially for this project. All that was needed was their written consent to include their data in the sample.

Because the system is new and had not yet achieved a sufficiently significant market penetration, it was necessary to wait until the end of 2005 before commencing recruitment of the sample. A long list of venues was identified ensuring a broadly representative range of the kinds of venues that the Arts Council's fund. Venues were selected to include representation from large and small, specialist and general, receiving and producing, rural and urban. (See Figure 1 for a list of participating venues).

Purple Seven prepared data tables which were imported and analysed by Cultural Intelligence using SPSS statistical analysis software.

For the purposes of the study, walk-up bookers were defined as people buying tickets within 1 hour of the start time of the performance.

The sample venues

Consent was achieved from 25 venues but due to technical difficulties it was not possible to include four of these in the sample. Venues were deliberately over-recruited to allow for this.

Participating venues included:

Name	Location	Type	Capacity(s)
Albany Deptford	London	Arts Centre	300
Arts Depot	London	Arts Centre	100-400
Battersea Arts Centre	London	Arts Centre	50-150
Belfast Festival at Queens	Belfast	Concert Hall/Festival	200-1224
Broadway Theatre	Barking	Local authority theatre	350
Citizens Theatre	Glasgow	Producing theatre	100-450
Grand Opera House	Belfast	Opera House	1001
The Haymarket Theatre	Leicester	Arts Centre	100-750
Malvern Festival Theatre	Malvern	Arts Centre	500-850
North Edinburgh Arts Centre	Edinburgh	Arts Centre	150
Playhouse Theatre, Derry	Derry	Arts Centre	200
Polka Theatre	London	Children's Theatre	80-300
Queen's Theatre Hornchurch	Hornchurch	Theatre	503
Royal Lyceum Theatre	Edinburgh	Producing Theatre	658
Sadlers Wells Theatre	London	Dance/Opera House	180-1560
The Arches	Glasgow	Arts Centre	60 to 1800
The Courtyard	Hereford	Arts Centre	140-400
The Drum	Birmingham	BEM Arts Centre	140-351
The Green Room	Manchester	Arts Centre	197
The Place	London	Dance house	300
Tron Theatre	Glasgow	Producing/Presenting	230
Usher Hall	Edinburgh	Concert Hall	2200
Warwick Arts Centre	Coventry	Arts Centre	200-1500

Figure 1 Venues included in sample

Venues were asked to nominate one week's programming from the months of September and October 2005. They were asked to propose a generally busy week that had few completely pre-sold shows. This produced a database comprising 211 events with sales of 60,447 tickets to a value of £937,871.

The sample included 23,185 customers. It is possible that several customers bought more than once from a venue or from more than one venue in that week but it was not considered necessary to make an allowance for this minor issue.

In the analysis of events, all events with sales of less than 25 tickets were excluded, as were quirky events such as 'car parking' and 'restaurant booking' and participatory workshops. Other statistically very extreme transactions or events were also excluded.

It was apparent that a small minority of venues transact tickets to a 'doors' account to be then sold manually. To eliminate bias in the analysis individual walk-up transactions of 10 tickets or more were excluded (these numbered only 45 transactions out of 1,494).

In order to limit the sample to genuine sales to customers, all transactions to the value of £1 or less, and bookers showing more than 100 visits in the previous 2 years were also excluded from the sample. Of these 54 were walk-up transactions.

Events were classified by type. Because of the diverse approaches to artform classification used by venues, only the most general classifications were possible. Film events were excluded from the analysis on the basis that cinema booking practices are very different to most live performance events.

Analysis was conducted using two levels of the same data.

The first was a table of 23,185 individual transactions. Where this data level was used, the findings are presented in terms of 'transactions' of 'individual bookers'.

The second was a table of 211 events in which the data from the transaction table aggregated by event was used to arrive at averages per event and are described as such in the presentation of findings.

Event types were represented in the sample as follows.

		Events		Transactions	
		Count	%	Count	%
Comedy	Stand-up comedy, alternative comedy, etc	9	4.3%	974	4.2%
Other music	Traditional music, world music, jazz, rock, folk, etc	41	19.4%	3,422	14.8%
OPCMD	Opera and classical music including all orchestral music and chamber music, dance including ballet and modern dance	30	14.2%	7,003	30.2%
Other	All events not classifiable in other categories	15	7.1%	2,959	12.8%
Theatre	All live drama and theatre based shows	116	55.0%	8,827	38.1%
Total		211	100%	23,185	100%

Figure 2 Event and transaction sample by artform

The venues for events were classified according to the capacity of the auditorium in which the event took place.

The following venue scale categories were used:

- Small – 0-300
- Medium – 301 to 800
- Large – 801+

	Count of events	Percent
Small	133	63.0%
Medium	50	23.7%
Large	28	13.3%
Total	211	100.0%

Figure 3 Sampled events by scale

The distribution of event types by venue scale was found to be significant to the findings.

	Small	Medium	Large
Base	133	50	28
Comedy	5.3%	2.0%	3.6%
Other music	19.5%	22.0%	14.3%
OPCMD	8.3%	14.0%	42.9%
Other	6.0%	10.0%	7.1%
Theatre	60.9%	52.0%	32.1%
	100.0%	100.0%	100.0%

Figure 4 Distribution of events by venue scale by event type (events)

	Base	Small	Medium	Large	Total
Comedy	9	77.8%	11.1%	11.1%	100.0%
Other music	41	63.4%	26.8%	9.8%	100.0%
OPCMD	30	36.7%	23.3%	40.0%	100.0%
Other	15	53.3%	33.3%	13.3%	100.0%
theatre	116	69.8%	22.4%	7.8%	100.0%

Figure 5 Distribution of transactions by venue scale and event type (transactions)

4 Survey Findings

4.1 Who responded to the survey

There was a total of 826 respondents to the survey sampled across 18 venues in England, Scotland and Wales and 42 performances.

Attender type

The table below shows the number of respondents to the survey by attender type.

	Base	826
Advance booker		435
Walk-up booker		118
Non-booker		273

Figure 6 Number of respondents to the survey categorised by attender type

Survey sample - artforms

Figure 7 shows the number of respondents to each performance categorised by artform.

Opera		Contemporary		Drama		Classical		
Aida - Hackney	21	Chango Spasiuk World Music	25	Bent	16	Bright Lights	15	
Nutcracker	13	Diversions - Gwynedd	13	Bloody Mess	16	Carmina Gurana	23	
Swan Lake	39	Liz Lea	18	Miss Saigon	22	Halle	30	
Swan Lake/ Nutcracker	19	Oguike	11	Monty	16	Jacque Loussier	17	
Cosi Fan Tutte	12	Oh my Goddess	32	Oh! What a Night	25	Scottish Chamber Orchestra - Aberdeen	24	
Aida - Marlowe	22	Richard Alston Dance	25	Out of Order	23	Scottish Chamber Orchestra - Inverness	12	
Dangerous Liaisons	21	Ricochet Dance	11	The Caretaker	3	The Hanover Band	21	
Romance in Vienna	12	Sam Rivers Jazz	26	Ying Tong	23	Lindsays	17	
Passionata	24	Up Close and Personal	21	Fruit Salad	23	Royal Scottish National Orchestra	21	
Carmen	24	Diversions - Brecon	18	The Glee Club	20	Tchaikovsky Gala Night	19	
				Lysh	21			
				Fame	12			
	10	207	10	200	12	220	10	199

Figure 7 Number of respondents by performance and artform

Figure 8 shows the number of respondents by event type and by attender type.

Artform	Base		Advance booker		Walk-up booker		Non-booker	
	826	-	435		118		273	
Opera/ballet	207	25%	114	26%	31	26%	62	23%
Drama	220	27%	114	26%	41	35%	65	24%
Contemporary dance/music	200	24%	94	22%	26	22%	80	29%
Classical music	199	24%	113	26%	20	17%	66	24%
		100%		100%		100%		100%

Figure 8 Number of respondents by event type and attender type

4.2 About the respondent

Gender

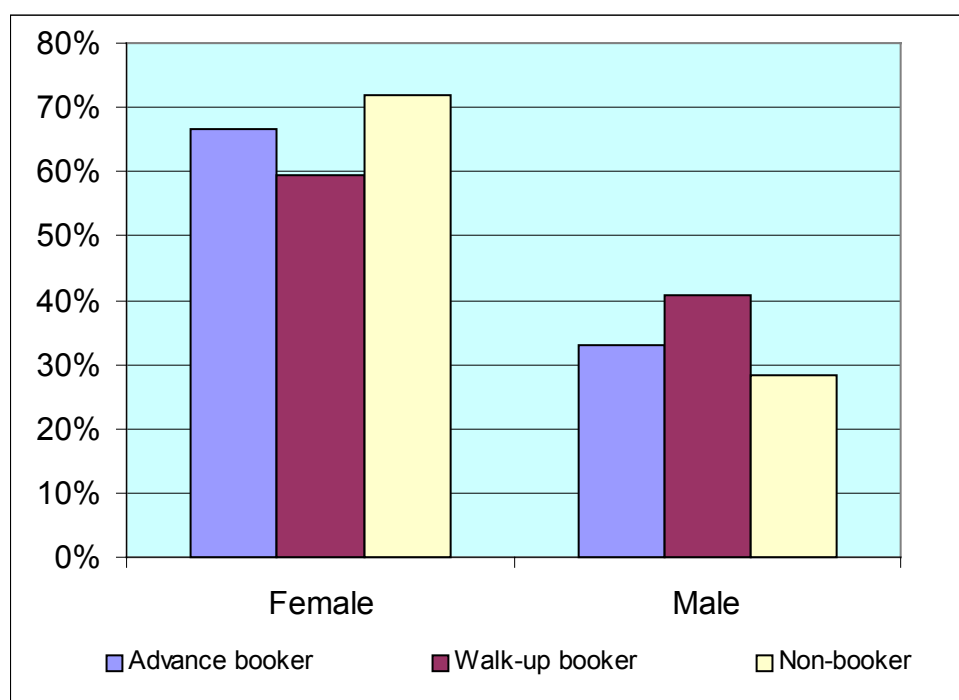


Figure 9 Gender of the respondent by attender type

- There was a higher proportion of male walk-ups compared to the other booker types:
- Non bookers represented the highest proportion of females
- Ratios of females to males:

- Non-bookers (72%:28%)
- Advance bookers (67%:33%)
- Walk-ups (59%:41%)

See Table 1, Appendix 3

Employment status

Respondents were asked to describe their employment status

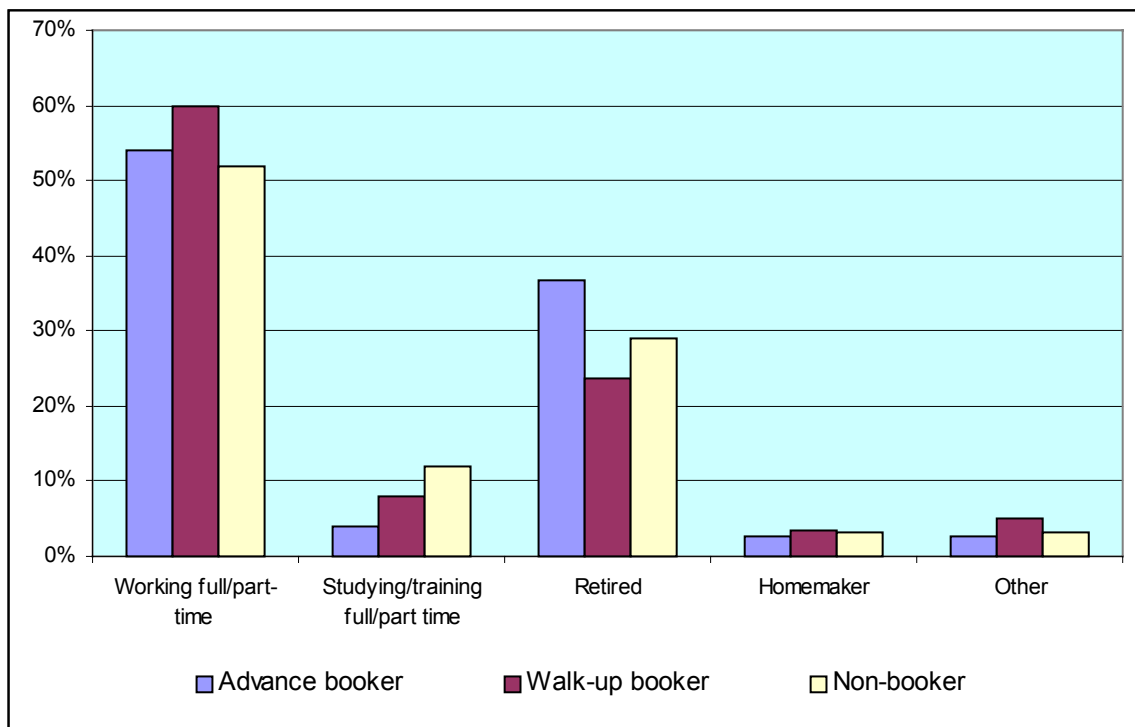


Figure 10 Employment status

- A slightly higher proportion of walk-up bookers were employed (60%) compared to advance bookers (53%) and non-bookers (52%)
- There were also differences in the proportion of retired respondents between attender types. A higher proportion of advance bookers were retired (37%) compared to 24% for walk-ups

See Table 2, Appendix 3

4.3 Frequency of visit

The respondent was asked how many times, including their current visit, they had attended a performance at the venue in the last 12 months.

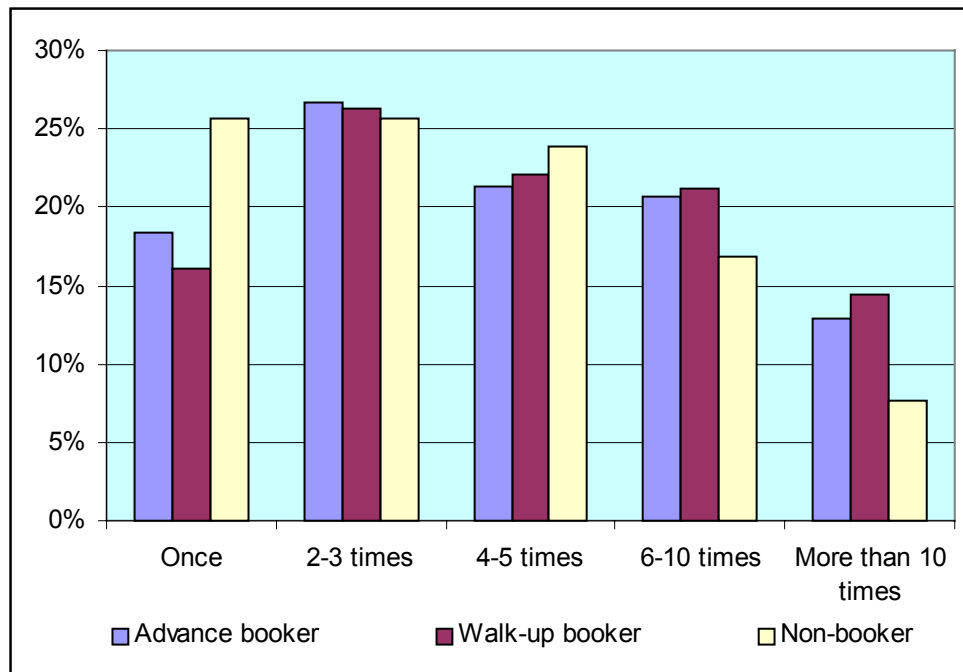


Figure 11 Number of times attended a performance at the venue in the last 12 months (including current visit)

- A quarter of the non-bookers attended the venue for the first time compared to 18% for advance bookers and 16% for walk-ups
- Advance bookers and walk-ups could be described as regular attenders to their venue compared to non-bookers i.e. a third of advance bookers and walk-ups had attended more than 6 times compared to a quarter of non-bookers
- 14% of walk-ups attended more than 10 times compared to 13% of advance bookers and 8% of non-bookers

See Table 3, Appendix 3

Note that the data analysis found walk-up bookers to have a slightly lower frequency than advance bookers; however, the data analysis was measuring previous 'bookings' not previous 'attendances'.

Respondents were asked how many times a year they attend live performances such as concerts, theatre and dance performances.

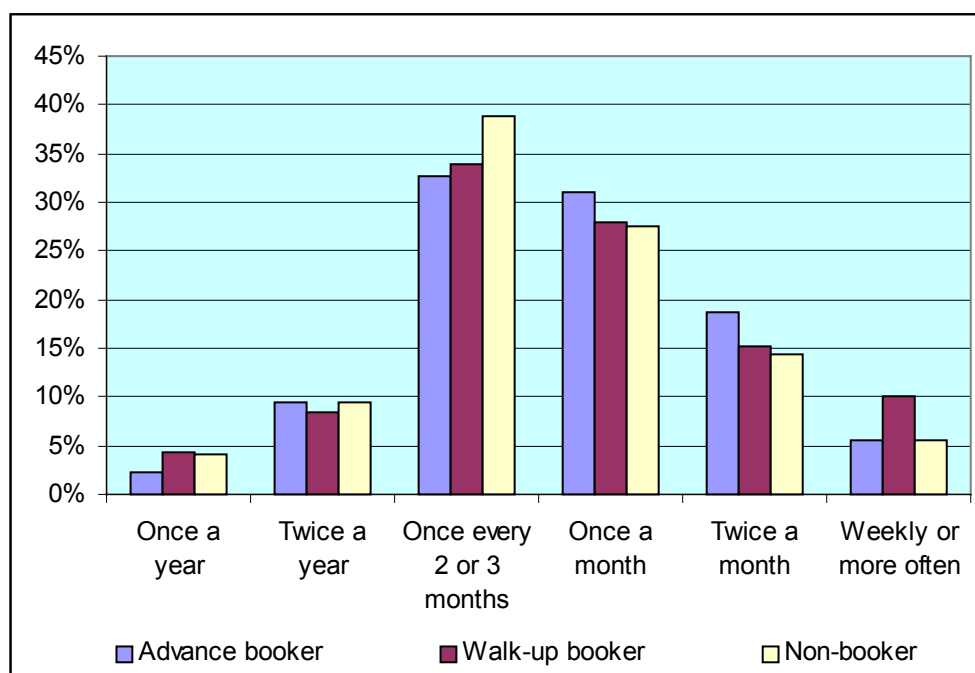


Figure 12 Number of times a year respondents attend live performances

- There was little variance in attendance levels to live performances between the booker types. Around 87% of all booker types said that they attended live performances four to six times a year or more
- 10% of walk-ups attend weekly or more often compared to 5% of advance and non-bookers

See Table 4, Appendix 3

4.4 Motivation to attend

Respondents were asked what in particular made them want to attend the performance. They were able to give up to three reasons.

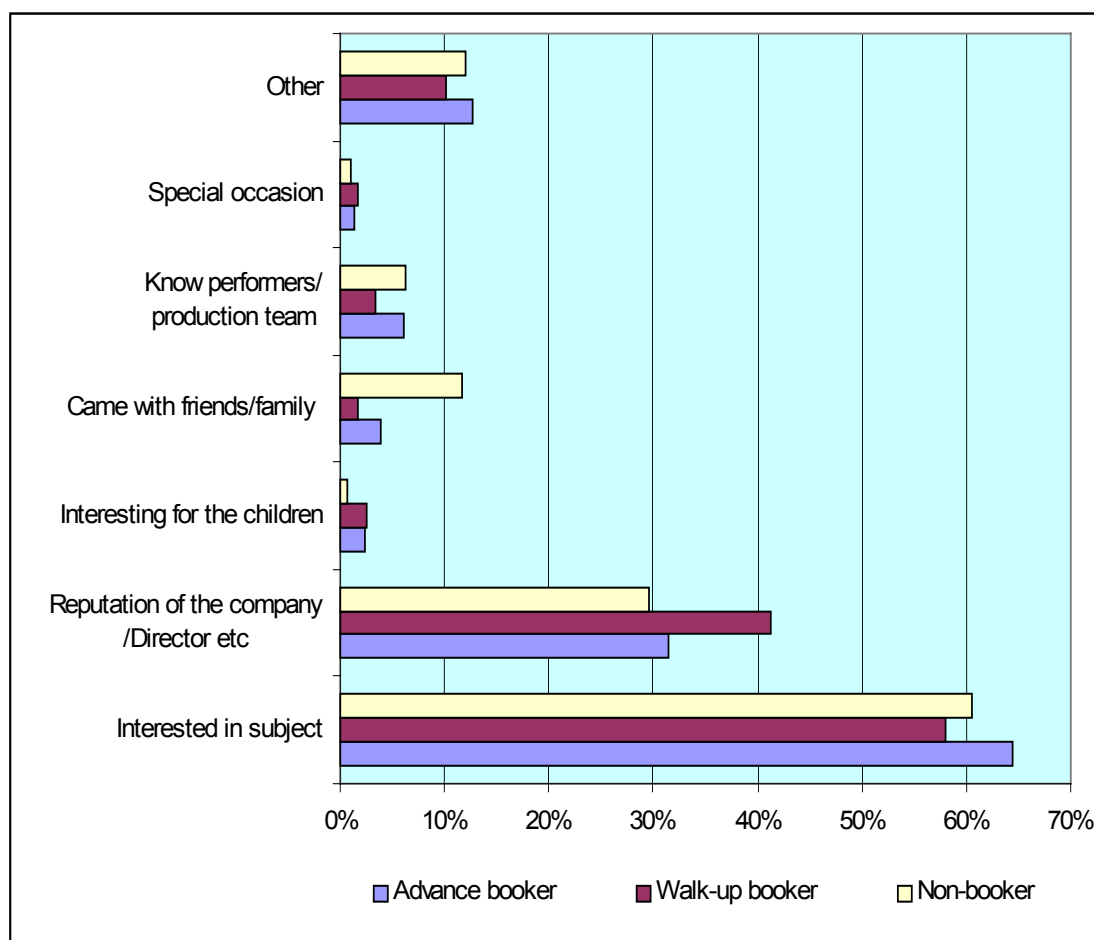


Figure 13 Motivation for attending

- A higher proportion of walk-up bookers (41%) said that the 'reputation of the company, director, writer, choreographer or performers' made them want to attend compared to advance bookers (31%) and non-bookers (30%)
- Not surprisingly, a significantly higher proportion of non-bookers (12%) said 'friends or family were coming so I came too' compared to advance bookers (4%) and walk-ups (2%)

See Table 5, Appendix 3

4.5 Ticket price

Respondents were asked what price band their tickets were in.

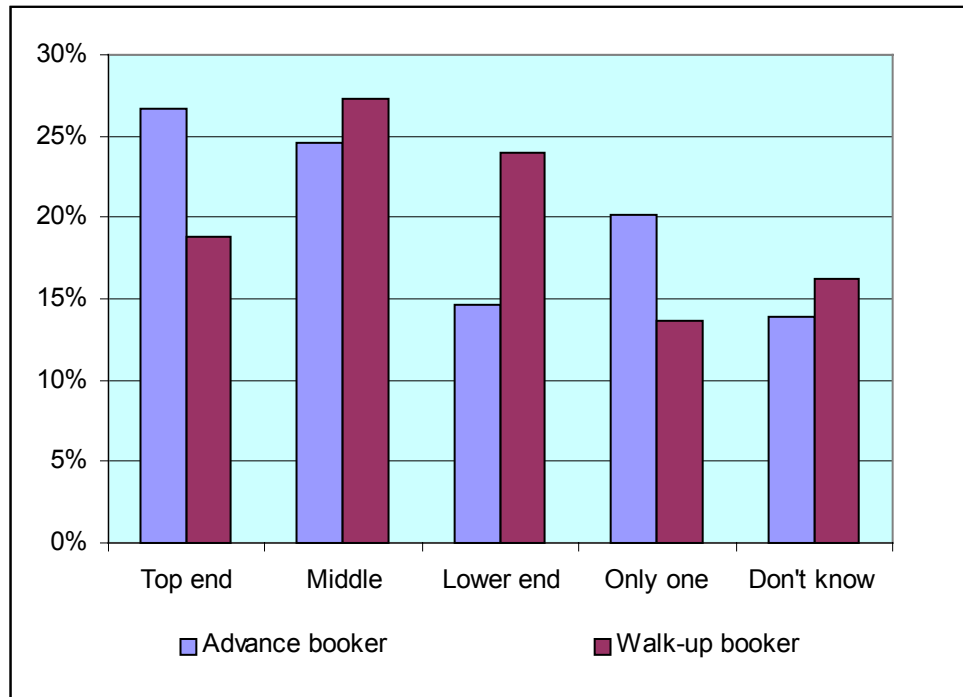


Figure 14 Ticket price band

- A higher proportion of advance bookers (27%) had tickets in the top price band compared to walk-ups (19%)
- A slightly higher proportions of walk-ups had tickets in the middle (27%) and in particular, lower (24%) price bands compared to advance bookers (25% middle, 15% lower end)
- Clearly, it would be meaningless to compare non-bookers because they are likely to have attended with advance bookers. As they didn't book their own tickets, they are less likely to know what price band their tickets were in – as borne out in Table 6

See Table 6, Appendix 8

The survey finding that advance bookers buy more expensive tickets was supported by the data analysis which found a significant difference in ticket yield between the two types of booker.

4.6 About the visiting party

The information in this section is concerned with the respondents to the survey and the people they attended with. The findings are segmented into walk-ups and advance bookers but exclude non-bookers because they would have attended with advance bookers or walk-ups and therefore cannot be considered as a visiting party in their own right.

Age and gender

The respondents represented a total of 2088 attenders of which 1256 (60%) were female and 836 (40%) were male.

To allow for distortions which may be produced by including large groups in the analysis (for example there was a walk-up party of 45 people, almost all of whom were females aged under 24), parties of 10 people (a total of 49 cases) and over were excluded to produce comparisons between walk-ups and advance bookers as illustrated in Figure 15

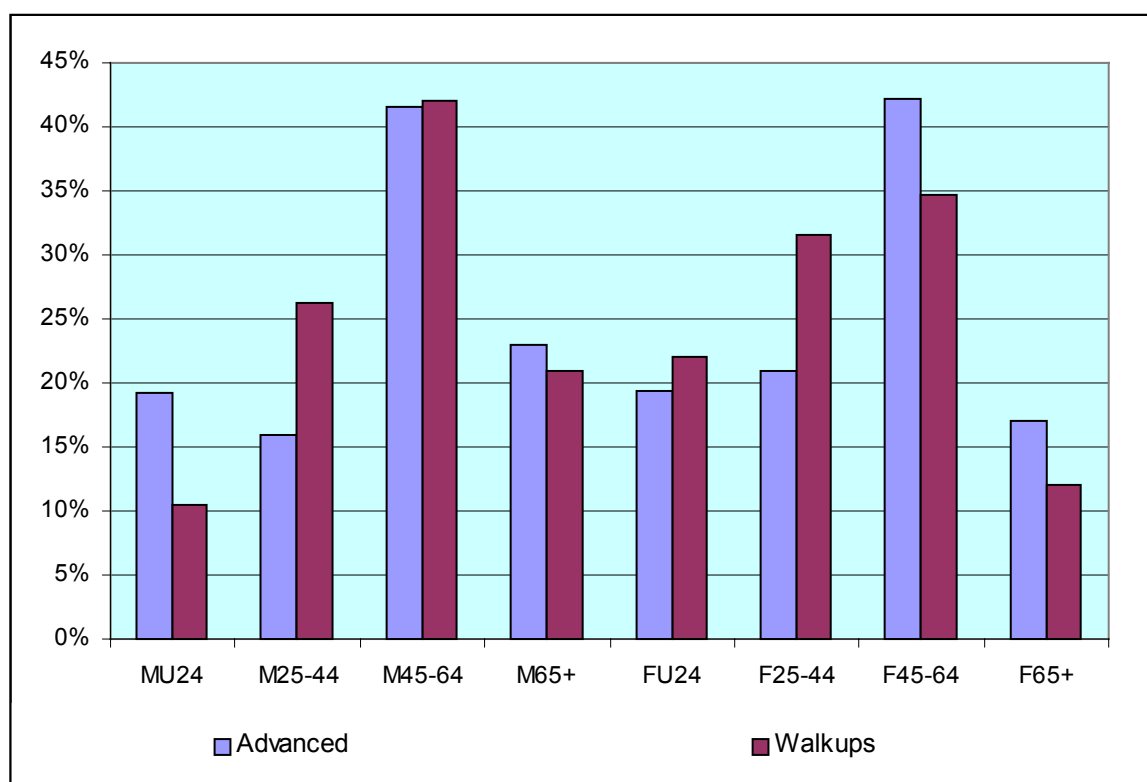


Figure 15 Age and gender of attenders in parties numbering less than 10

- There is no variation between males aged 45-64 attending in advance booker parties and walk-ups (both 42%)

- The variance between female under 24 walk-ups (22%) and attenders in advance parties (19%) is significantly less
- However, the proportion of female aged 24-44 walk-ups (32%) is greater than attenders in advance parties (21%)

See Table 7, Appendix 3 for detailed age and gender breakdown of all attenders

Ethnic origin

Respondents were asked to describe the ethnic origin of the people in their party including themselves.

	Advance		Walk-ups	
White	980	93%	259	90%
Asian	10	1%	1	0%
Black	37	3%	20	7%
Chinese	5	1%	0	0%
Mixed race	4	0%	4	1%
Other	7	1%	0	0%
Prefer not to say	11	1%	3	1%
TOTAL¹	1054	100%	287	100%

Figure 16 Ethnic origin of attenders

- 9% of walk-up attenders were of Black or minority ethnic origin compared to 6% of advance bookers
- The largest ethnic minority group was Black. 7% of walk-ups were Black compared to 3% of advance bookers

Disability

Respondents were asked how many in their party (including themselves) had a long- standing illness, disability or infirmity.

	Advance booker		Walk-up booker	
	435		118	
No reply	5	1%	-	
Yes	55	13%	14	12%
No	370	85%	103	87%
Prefer not to say	5	1%	1	1%

Figure 17 Disability of attenders

¹ A significant number of people declined to respond to this question hence lower Base

- Almost 15% of all attenders had a disability
- There was no significant difference between walk-ups and attenders

Type of visiting party

Respondents were asked who they attended the event with.

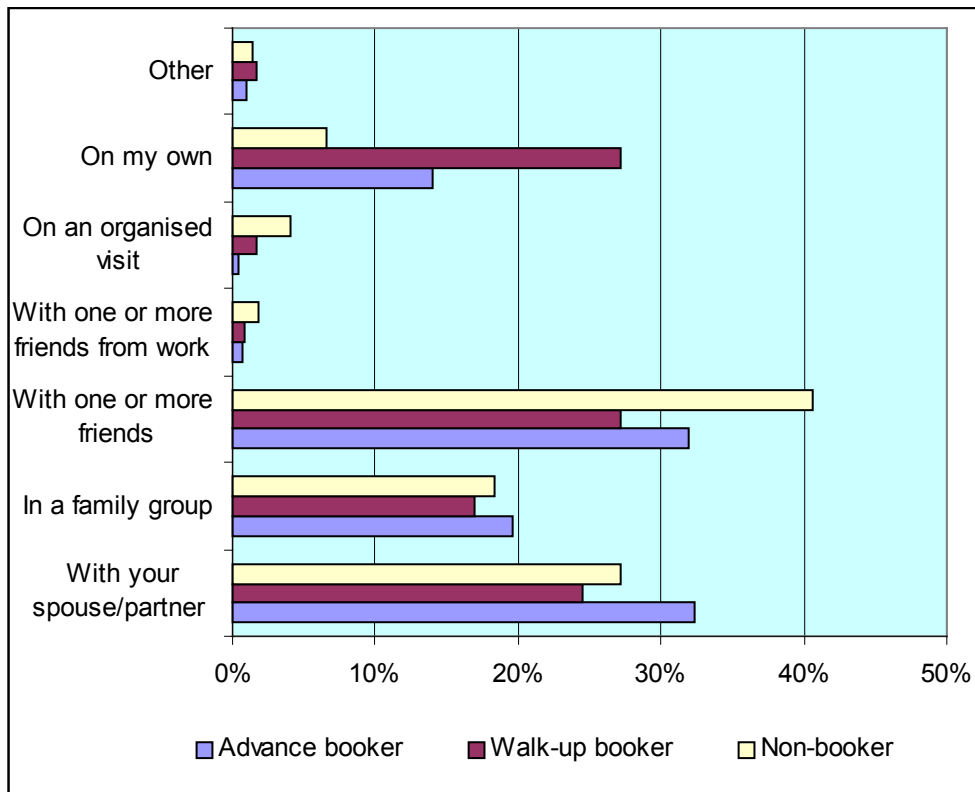


Figure 18 Type of visiting party

- A higher proportion of advance bookers (32%) attended with their spouse/partner compared to walk-ups (25%) and non-bookers (27%)
- A significantly higher proportion of walk-ups (27%) attended on their own compared to advance bookers (14%)

Advance bookers

Advance booker respondents were asked if it was usually they who took responsibility for booking tickets for these type of events.

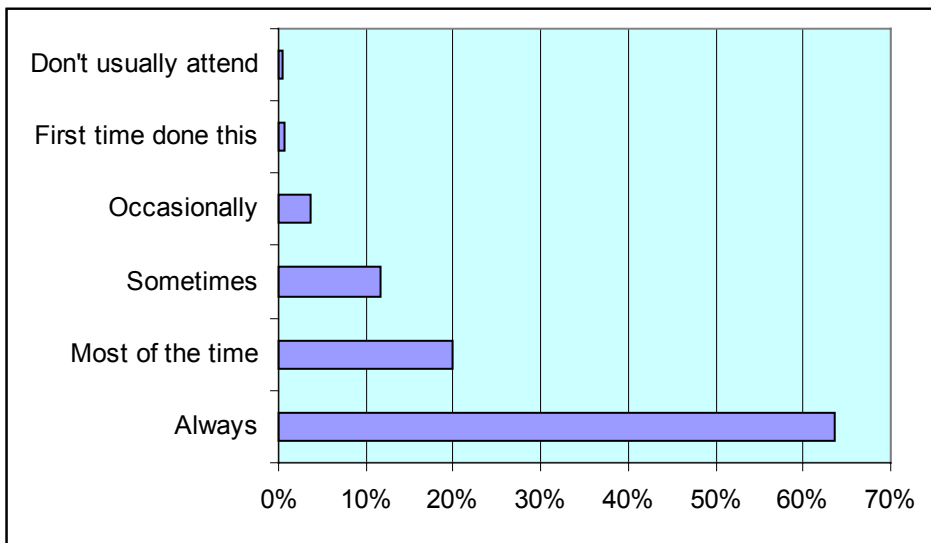


Figure 19 Advance bookers: Frequency of taking responsibility for booking tickets

- 84% of advance booker respondents said that they take responsibility for booking tickets most of the time or always

Advance bookers were then asked the main reason why they booked their tickets in advance.

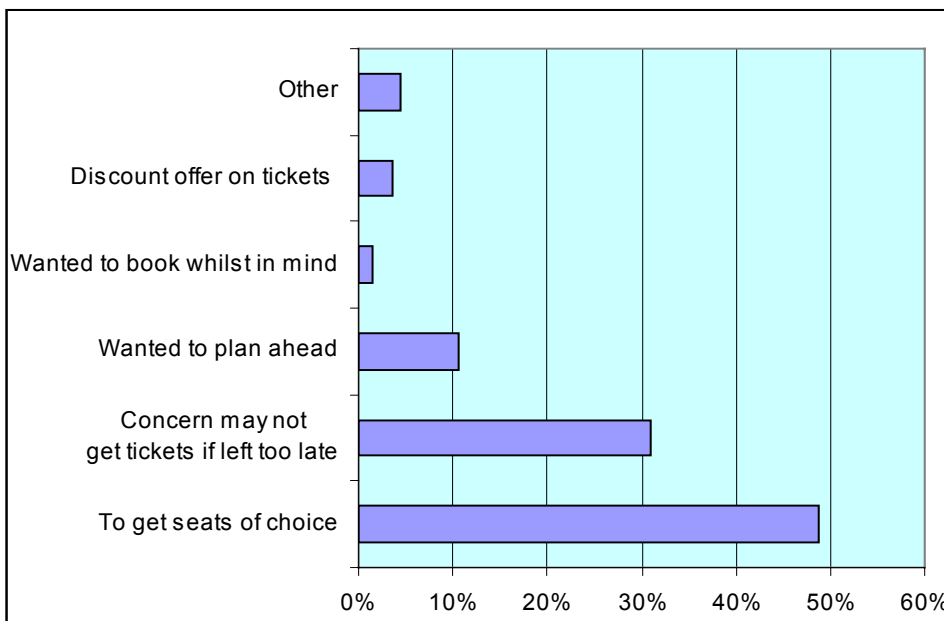


Figure 20 Advance bookers: Main reason for booking tickets In advance

- Almost half of the respondents said that the main reason they booked in advance was to ensure they got seats of their choice

- The second most cited reason was concern that they may not get tickets if they left it too late (31%)

See Table 11 and Table 12, Appendix 3

The frequency of advance bookers taking responsibility for booking tickets was cross-tabulated with artforms. This revealed that at one end of the scale 88% of advance bookers who attended opera or ballet always or most of the time take responsibility for booking their own tickets compared to 80% for drama.

See Table 13, Appendix 3

4.7 Walk-ups

Respondents were asked if they usually buy their tickets at the last minute.

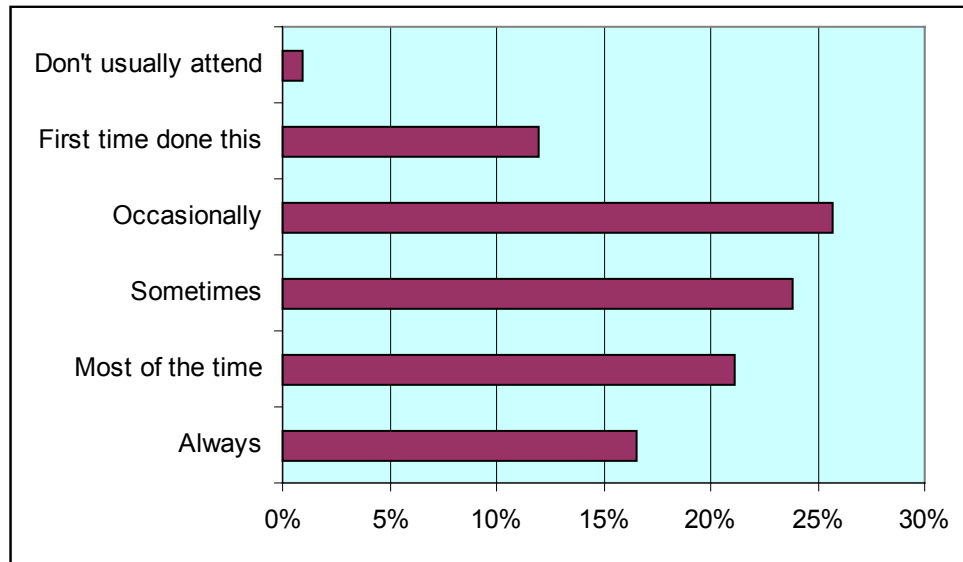


Figure 21 Walk-ups: Frequency of buying tickets at the last minute

- 38% of walk-up respondents said that they usually buy their tickets at the last minute 'most of the time' or 'always'
- 12% said that it was the 'first time' they have done this
- This was occasional behaviour for 38%

Walk-ups were asked the **main** reason why they bought tickets on the door rather than booking in advance.

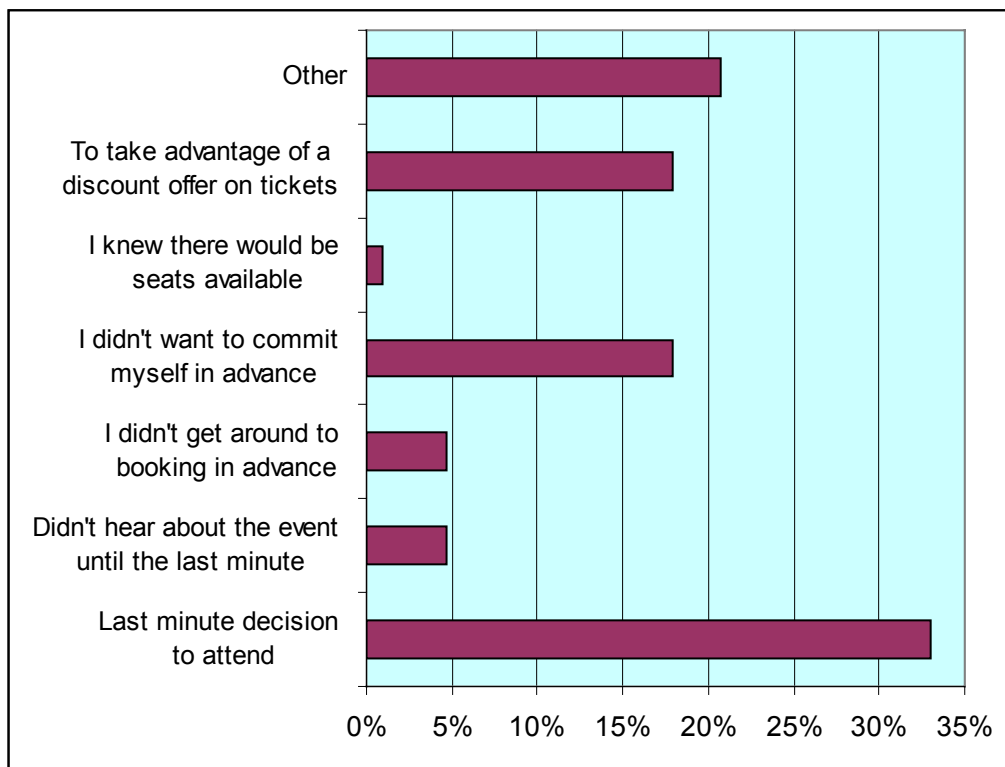


Figure 22 Walk-ups: Main reason for buying tickets on the door

- A third said that it was 'a last minute decision to attend'
- The next most commonly cited reasons were 'I didn't want to commit myself in advance' (18%) and 'To take advantage of a discount offer on tickets' (18%)
- The proportions of respondents who said 'I knew there would be seats available', 'I didn't get round to booking in advance' and 'I didn't hear about the event until the last minute' are significantly low

Walk-up respondents were then asked what **other** reasons led them to buying tickets on the door. 73% of walk-ups said that there weren't any other reasons. 11% said that it was a last minute decision to attend

See Table 14, Table 15, Table 16, Appendix 3

4.8 Non-bookers

Non-booker respondents were asked if they ever personally booked tickets for these types of events.

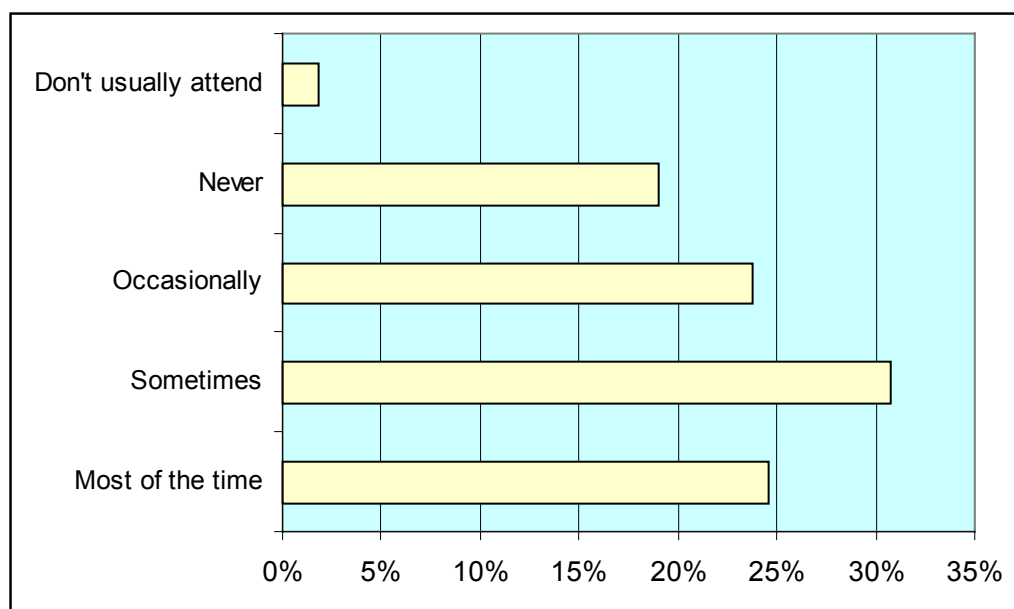


Figure 23 Non-bookers: Frequency of booking tickets

- Almost one quarter of non-bookers could normally be described as habitual bookers
- 55% said that they personally booked tickets sometimes or occasionally
- 19% said that they never personally book tickets

See Table 17, Appendix 3

5 Walk-ups data analysis findings

This section of the report includes analysis of all events and transactions in the sample as well as analysis segmented by size of venue and event type.

Based on the whole sample for the data analysis, the 'average' audience is made up as follows:

Non-booking attenders – 65%

Advance bookers – 36%

Walk-up bookers – 2%

What proportion of bookers are walk-ups?

The issue of what proportion of bookers is made up of walk-up bookers is key to understanding the extent to which walk-up bookers should be a matter for concern in analysis of box office data.

Figure 24 shows what proportion of events in the study attracted 0% walk-ups, 0-5% walk-ups and so on. For instance the third bar from the left shows that at approximately 15% of events, between 10 and 15% of bookers were walk-ups.

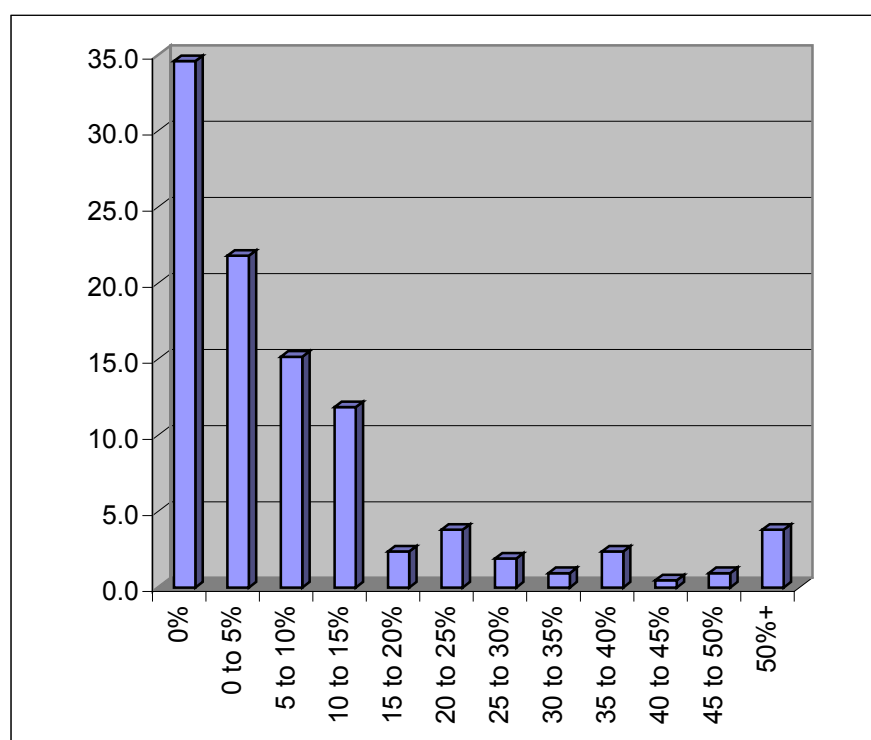


Figure 24 Proportion of bookers who are walk-ups by % events

- Of the 23,185 customers in the sample, 1,127 (4.9%) purchased their tickets within 1 hour of the start of the performance and are therefore considered as 'walk-up bookers'.

However, the generalisation that customers for an 'average event' include approximately 5% of bookers who walk up does merit some further consideration.

- More than a third (34.6%) of the 211 events in the sample had no walk-up bookers at all, but 22% of events had between 0 and 5% walk-up bookers

This finding helps explain some of the difficulties in achieving the walk-ups sample in the survey.

The proportion of bookers who are walk-ups varied between event type. Figure 25 shows the proportion of walk-up bookers by event type

	Base	Advanced	Walk-up
All	23185	95.1%	4.9%
Comedy	974	97.2%	2.8%
Other music	3422	96.3%	3.7%
OPCMD	7003	96.3%	3.7%
Other	2959	97.3%	2.7%
Theatre	8827	93.1%	6.9%

Figure 25 Proportion of walk-up bookers by event type (transaction table)

- At 6.7%, Theatre attracted a notably higher proportion of walk-up bookers than the other event types.

It is relevant that theatre events in the sample tended to take place in the small and medium scale venues because walk-ups were over-represented in these venues (45% of walk-ups were found in small venues although small venues only accounted for 23% of all bookers see Appendix 4 - Table 22)

The difference between small and large scale venues was marked. Figure 26 illustrates the proportion of walk-up booker to advance booker by venue scale.

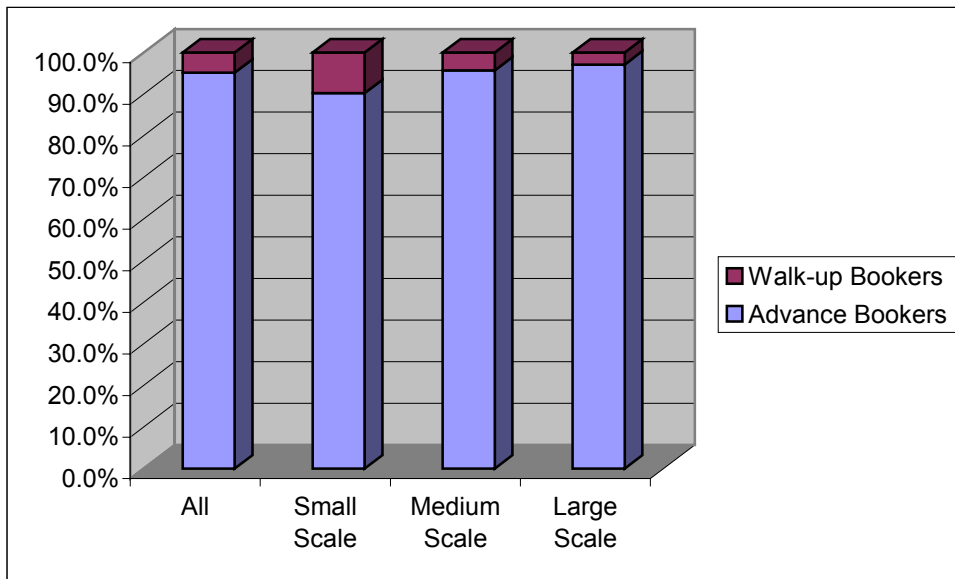


Figure 26 Ratio of advance bookers to walk-ups by venue scale

- The small scale venues attracted nearly 10% walk-up bookers compared to large scale venues which attracted only 3% (see Appendix 4 - Table 19).

The effect of venue size on the proportion of walk-ups for theatre is illustrated. If the venue size had no influence the columns would be equally proportioned.

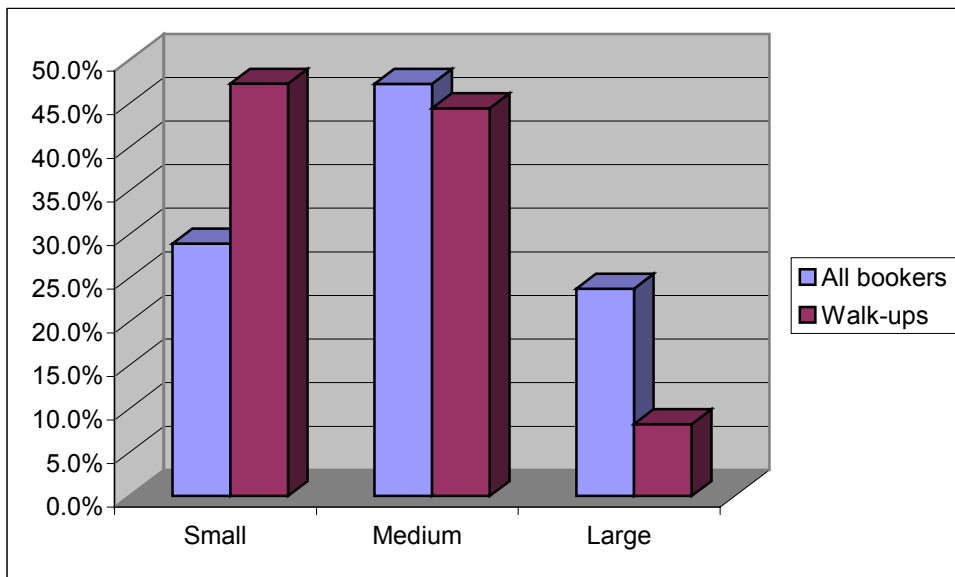


Figure 27 Influence of venue scale on 'theatre' booker type

- 22 out of 211 events had greater than 25% of bookers who were walk-ups. Of these, a significant majority were in 'Theatre' (59.1%) followed by 'Other music' and 'Comedy' (18.2% and 13.6%) (see Appendix 4 Table 21).
- All events attracting greater than 25% walk-ups were in small scale venues.

What proportion of sales do walk-ups bookers produce?

It is equally important to consider the proportion of tickets bought by walk-up bookers and the proportion of box office income that their bookings provide.

Figure 28 shows the volume and value of walk-up bookers verses advance bookers broken down by artform.

Base: 23,185	Volume (Tickets)		Value (£ Sales)	
	Advance Bookers	Walk-up Bookers	Advance Bookers	Walk-up Bookers
Tickets				
All	96.5%	3.5%	97.3%	2.7%
Comedy	97.6%	2.4%	98.3%	1.7%
Other music	97.5%	2.5%	98.3%	1.7%
OPCMD	97.5%	2.5%	98.3%	1.7%
Other	98.1%	1.9%	99.0%	1.0%
Theatre	95.1%	4.9%	96.6%	3.4%

Figure 28 Volume and value of booker types by artform (Transactions)

- Although walk-up bookers average 5% of all bookers, on average they account for only 3.5% of tickets sold.
- Although walk-up bookers average 5% of all bookers they generally account for an average of only 2.7% of box office income.

Figure 29 gives the same information only broken down by venue scale. Note the close relationship between volume and value of walk-up sales at large scale venues compared to the other venue scales. This is reflected in the table of ticket yield shown in Figure 34.

Base: 23,185	Volume (Tickets)		Value (£ Sales)	
	Advance Bookers	Walk-up Bookers	Advance Bookers	Walk-up Bookers
All	96.5%	3.5%	97.3%	2.7%
Small Scale	92.8%	7.2%	94.4%	5.6%
Medium Scale	97.1%	2.9%	97.4%	2.6%
Large Scale	98.0%	2.0%	98.1%	1.9%

Figure 29 Volume and value of booker types by venue scale (transactions table)

It is notable that at all event types, the proportion of tickets bought by walk-ups is greater than the financial proportion of sales that they represent. This is because walk-up bookers tend to buy fewer tickets than advance bookers and they tend to pay less for the tickets that they buy.

Ave Booking Size	Base	Advance Bookers	Walk-up Bookers	Differential % of WU Booking
All	23,185	2.6	1.9	39.14%
Small Scale	5,206	2.9	2.1	40.34%
Medium Scale	7,198	2.8	1.9	47.96%
Large Scale	10,781	2.4	1.6	47.62%

Figure 30 Average booking size by booker type and venue size (transactions table)

Whilst there are wide variations from event to event, when averaged it was found that walk-up bookers tended to buy 1.9 tickets per purchase whilst advance bookers averaged 2.6 tickets per transaction. (see Figure 30).

- Advance bookers buy on average 37% more tickets in any one transaction than walk-up bookers
- This phenomenon is most marked at large scale venues where advance bookers tended to buy 47.6% more tickets in a single transaction than walk-ups.

Figure 31 shows the difference in booking size by booker type and event type. The difference is most marked at musical events.

TICKETS	Base	Advance Bookers	Walk-up Bookers	Differential % of WU Booking
All	23,185	2.6	1.9	39.14%
Comedy*	947	2.6	2.3	14.18%
Other music	3,422	2.8	1.9	49.75%
OPCMD	7,003	2.8	1.9	49.75%
Other	2,959	2.0	1.4	40.19%
Theatre	8,827	2.0	1.4	40.19%

Figure 31 Average. booking size by booker type and event type (transactions table)

- At 'Opera, Classical music and Dance' and at 'Other music' advance bookers bought nearly 50% more tickets per transaction

Figure 32 and Figure 33 both illustrate the value of an advance booker over a walk-up. Not only do they buy more tickets in any single transaction, but they pay more for them.

Average Spend	Base	Advance Bookers	Walk-up Bookers	Differential % of WU spend
All	23,185	£41.38	£22.27	85.79%
Small Scale	5,206	£27.47	£15.21	80.65%
Medium Scale	7,198	£39.51	£23.53	67.94%
Large Scale	10,781	£48.85	£32.60	49.84%

Figure 32 Average spend by booker type and venue scale (transactions)

Base: 221	Advance Bookers	Walk-up Bookers	Differential % of WU spend
All	£41.38	£22.27	85.79%
Comedy	£36.47	£22.22	64.12%
Other music	£44.24	£19.65	125.21%
OPCMD	£44.24	£19.65	125.21%
Other	£15.84	£5.67	179.39%
Theatre	£42.91	£20.21	112.32%

Figure 33 Average spend by booker type and venue scale (based on averaging events)

The yield per ticket was calculated for the different booker types attending different event types. It was notable that ticket yield from advance sales was significantly higher at smaller venues. At large venues the difference is very modest.

YIELD	Base	Advance bookers	Walk-up bookers	Differential	Differential % of WU Yield
All	23,185	£15.96	£11.95	£4.01	33.6%
Small	5,206	£9.87	£7.60	£2.27	29.8%
Medium	7,198	£14.44	£11.73	£2.71	23.1%
Large	10,781	£19.68	£19.28	£0.40	2.1%

Figure 34 Average ticket yield by booker type and venue scale (transactions)

- At 'Theatre' the ticket yield of advance sales is £5.07 (51%) greater than for walk-up bookers.

This may suggest the widespread use of last minute offers such as ‘student standbys’ or other ‘papering’ techniques.

YIELD	Base	Advance bookers	Walk-up bookers	Differential	Differential
All	23,185	£15.96	£11.95	£4.01	33.56%
Comedy	947	£14.33	£10.26	£4.07	39.70%
Other music	3,422	£16.89	£12.01	£4.87	40.58%
OPCMD	7,003	£20.84	£18.56	£2.28	12.29%
Other	2,959	£6.80	£3.98	£2.82	70.76%
Theatre	8,827	£14.99	£9.92	£5.07	51.11%

Figure 35 Average ticket yield by booker type and event type (transactions)

- On average, advance bookers pay one third more for their tickets than walk-up bookers.
- Higher priced tickets generally produce a smaller differential between the walk-up yield and the advance booker yield.

What is the significance of failure to capture walk-up data?

One of the main concerns over walk-up bookers is the possibility that venues fail to capture patron data and that, therefore, research based upon analysis of box office records may misrepresent audience behaviour. It was therefore considered desirable not only to consider the proportion of bookers made up of walk-ups but also the extent to which data was not captured.

Besides the event title, date, price paid, etc, the patron information of greatest importance is the customer’s name and address. It was therefore agreed that incomplete data would be defined as transactions which can not be linked to both a surname and a postcode.

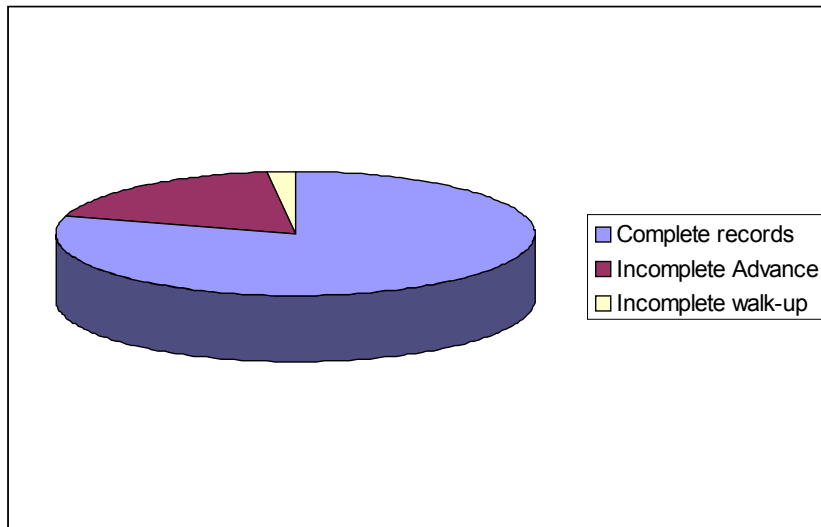


Figure 36 Incomplete records by booker type

For the whole of the sample it was found that 20% of all transactions were missing surname or postcode. 19% of advance booker transactions were missing either the postcode or name, whilst for walk-up bookers this figure was 42%.

- Walk-up bookers are responsible for one in ten incomplete patron data records.
- As a proportion of all transactions, walk-ups with missing data make up 2%

Whilst the patron records of walk-up bookers are substantially less complete than those for advance bookers, for most venues they represent such a small proportion of transaction records that missing records are unlikely substantially to influence findings in general box office research. The influence might, however, be greater at venues which have an extraordinary proportion of walk-up bookers or which are notoriously poor in their data capture of these bookers.

Are walk-up bookers more likely to be booking for the first time?

The box office records were interrogated to determine the number of first time bookers at the events. In this instance, bookers were taken to be booking for the first time if a full new patron record was established for the purpose of the transaction relating to that event. Because classification of first timer is based upon individual customer histories, calculations were based only on records which show complete records (i.e. surname and postcode).

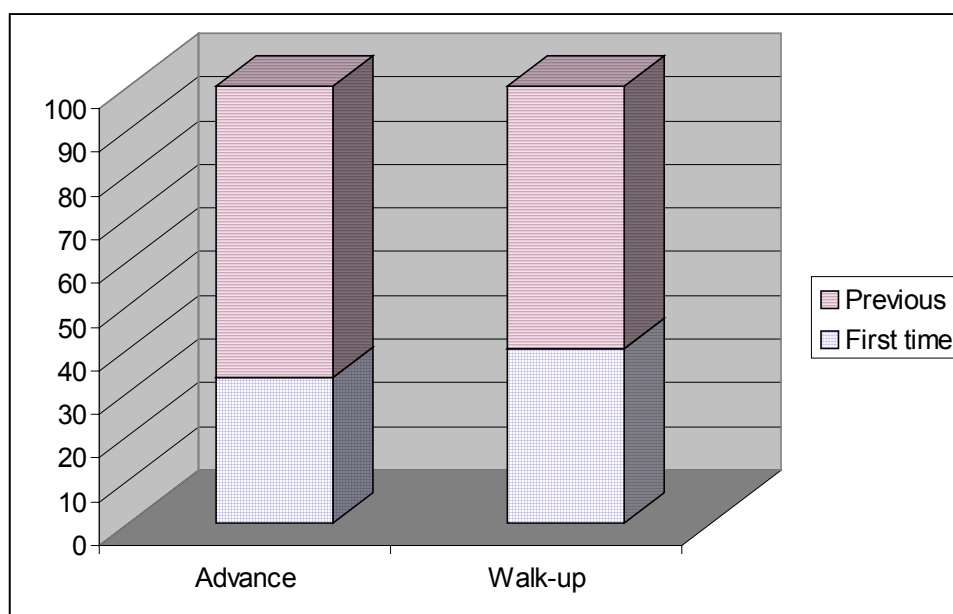


Figure 37 Booker type by first-timer

- 33.4% of advance bookers were booking for the first time. For walk-up bookers this figure was 39.9%.

	Base	Advance bookers who are first timers	Walk-up bookers who are First-timers
All	6221	33.4%	39.9%
Small	1852	38.0%	47.8%
Medium	1224	27.6%	22.3%
Large	3145	34.0%	37.4%

Figure 38 Proportion of booker types who are first-timers (transactions)

- One in three advance bookers were booking at the venue for the first time compared to two in five walk-up bookers.

At small and large scale venues, walk-up bookers were more likely than advance bookers to be booking for the first time. This was not true at medium scale venues.

Do walk-up bookers attend less frequently than advance bookers?

The frequency with which walk-up bookers attend a particular venue helps indicate whether they book at the last minute because they are not familiar with the more regular practice of booking in advance, or because they are well-informed arts attenders who know just how late they can leave it to book for a particular show.

Because this calculation is based on a ticketing history, all incomplete transactions were excluded from the sample.

Frequency	Base	Advance Bookers	Walk-up Bookers	Differential % of WU spend
All	23,185	2.7	2.3	16.37%
Small Scale	5,206	2.5	2.0	23.30%
Medium Scale	7,198	3.6	3.8	4.62%
Large Scale	10,781	2.3	1.8	27.54%

Figure 39 Average annual bookings by booker type and venue scale

- Advance bookers booked approximately 2.7 events per year, whilst for walk-up bookers the figure was 2.3.
- At the medium scale, all bookers were found to have a significantly higher frequency of attendance than at small and large scale venues, with walk-ups having a slightly higher frequency than advance bookers.

Although walk-up bookers appear to attend less frequently it is likely that their frequency may be slightly higher than the figure of 2.3 events per year, because walk-ups experience lower levels of data capture and therefore do not build such complete ticketing histories.

Do walk-ups live closer to venues?

It was felt likely that people buying their tickets at the last minute would live closer to the venue as people are unlikely to travel a great distance without booking a ticket first. Drive-time data was available for 16,657 advance bookers and 524 walk-up bookers.

Average drive time for advance and walk-up bookers was computed and found to be 36 minutes.

Whilst average drive time was indeed found to be less for walk-up bookers, at 33 minutes the differential was only 3 minutes (10%). No segmentation was possible by venue scale or event type due to insufficient drive-time data.

Are walk-up bookers a distinct group?

To answer this question it is necessary to take an overview of all the findings of the data analysis. If walk-ups were a distinct tribe they might be expected to differ from advance bookers significantly across many of the variables discussed above. It might also be expected that MOSAIC profiling would indicate marked differences.

The MOSAIC system of consumer classification is based upon the fact that people with similar lifestyles, values and expectations, tend to live in similar types of house. A Mosaic coding is matched to the consumer's postcode to give a profile of the lifestyle they are likely to have.

Mosaic profiling was used to help address the question of whether or not walk-up bookers are a distinct group. If they were, one might expect to see it reflected in the kind of house and kind of neighbourhood that they live in, and the respective profiles of walk-ups and advance bookers would be distinctly different.

In fact the MOSAIC group profiles of walk-up bookers are remarkably close to that of advance bookers. However, there were distinct variations in three Mosaic Group types.

Walk-ups were less likely to be found in Group A – Symbols of Success and more likely to be found in ‘E Urban Intelligence’ and ‘F Welfare Borderline’.

At first sight, the higher proportion of ‘Welfare Borderline’ may seem surprising, however, closer examination reveals that bookers within this group were dominated by the Mosaic Types ‘F35 Bedsit Beneficiaries’ and ‘F36 Metro Multiculture’.

The first of these types is characterised by younger educated people taking advantage of cheap inner-city living in poor neighbourhoods. ‘Metro Multiculture’ tend to be young Black inner city populations actively engaged in forging a new cultural identity combining elements of their immigrant parents’ culture and that of modern urban Britain.

Base: 16,992	Advance bookers	Walk-up bookers	Differential
A Symbols of Success	24.2%	20.5%	3.7%
B Happy Families	7.8%	6.2%	1.7%
C Suburban Comfort	17.0%	14.5%	2.5%
D Ties of Community	9.1%	9.7%	0.5%
E Urban Intelligence	19.4%	24.1%	4.7%
F Welfare Borderline	4.7%	8.9%	4.2%
G Municipal Dependency	1.6%	1.4%	0.2%
H Blue Collar Enterprise	4.3%	4.1%	0.2%
I Twilight Subsistence	1.2%	1.2%	0.1%
J Grey Perspectives	4.9%	4.6%	0.3%
K Rural Isolation	5.7%	5.0%	0.7%

Figure 40 Booker type by Mosaic Group

(See Appendix 5 for a description of MOSAIC groups.)

MOSAIC profiling is based upon postcode. As a higher proportion of walk-up booker records were incomplete (81% of advance booker is captured whereas only 58% of walk-up data is captured), it is possible that within the incomplete walk-up transactions hide a group of distinctly different attenders who do indeed form a distinct tribe. It should be said that this could also be true of the advance bookers. However, from the evidence presented above, both seem unlikely.

It is widely understood that young people and possibly some specific cultural groups tend to buy their tickets late. Research specifically with these groups will shed light upon the extent to which this is the case and the reasons for it. However, whilst the

data analysis and the survey both suggested that walk-up bookers have a younger, more culturally diverse profile, no evidence was found to suggest that data not captured in walk-up sales masks a hidden horde of young or ethnically diverse attenders.

Although the difference in proportion is very minor . . .

Walk-ups have fewer. . .	Walk-ups have more . . .
<p>Group A</p> <ul style="list-style-type: none"> Middle-aged Successful Rewarding careers Professional occupations High incomes High net worth Choicest housing Expensive cars Exotic leisure pursuits 	<p>Group E</p> <ul style="list-style-type: none"> Young singles Few children Well educated Full time students Professionals Open-minded Cosmopolitan tastes Liberal views Cultural variety <p>Group F</p> <ul style="list-style-type: none"> Families Many young children Low incomes State benefits High deprivation Council housing Public transport Heavy watchers of TV Use cash

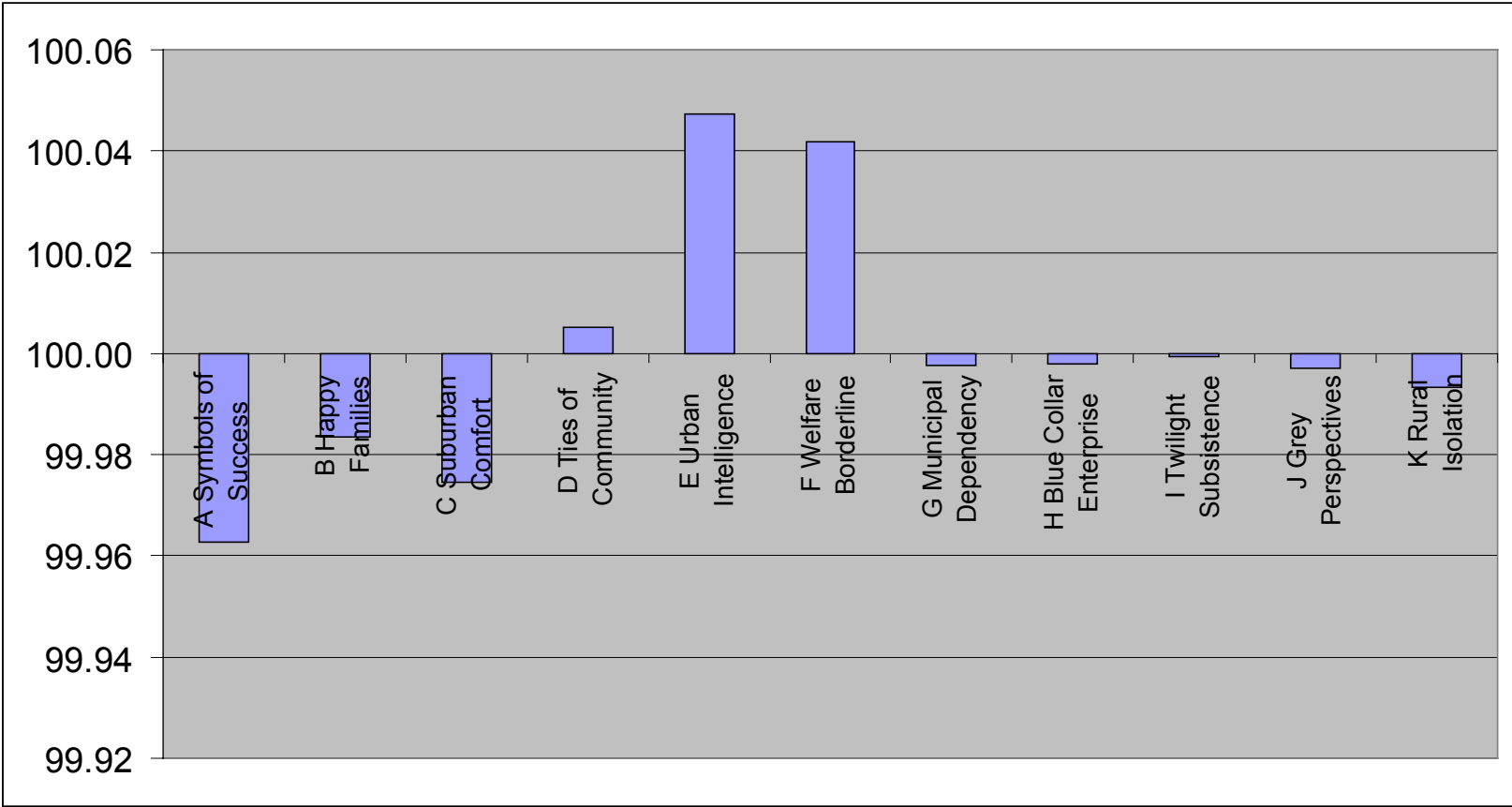


Figure 41 Mosaic Groups of booker types (Indexed - above the line walk-ups are over-represented)

6 Conclusion

This study sought to explore the differences and similarities between people who book their tickets in advance, those who buy their tickets on the door and those who don't buy their own tickets but who attend with someone who does.

The study comprised two phases, the first being a national telephone survey of 826 attenders of the three types. The second phase consisted of data analysis of 23,185 transactions from 221 events in venues of different types and scales across the United Kingdom. Taken together, the two phases have produced a substantial study which does much to further our understanding of the three attender types.

Most importantly, perhaps, it was found that only a fifth of non-booking attenders 'never book' their own tickets. This means that 80% of non-booking attenders are advance or walk-up bookers 'sometimes' or 'normally'. It is therefore hard to argue that they are a distinct group which is absent from that audience research which tends to focus on the booker as the research subject.

The walk-up booker was found to be a less common creature at most venues than was previously anticipated. However, distinct and significant differences were found between the proportion of walk-up bookers at small scale venues and at large scale venues.

The proportion of ticket sales and of box office income accounted for by walk-up sales was found to be very small. These findings reinforce the financial value of the advance booker over the walk-up.

Some evidence was found that walk-up booking behaviour may be associated with younger people. This supports the anecdotal views of many marketing managers that this group tends to plan late, although it must be remembered that a late decision to attend does not always result in buying tickets as late as 1hr before the performance.

The report included many findings which will be of value to researchers seeking to develop their interpretation of the audience research they commission or conduct. Such researchers will need to study this report and adapt its findings to their own situation.

For the marketing manager the lessons are clear. Firstly, that the advance booker is likely to buy more tickets and to pay more for them, so advance booking behaviour is to be actively promoted. Also, that can they relax slightly if they have been lying awake at night worrying that their audience surveys sample only bookers to the exclusion of the majority of the audience. The majority of the audience are bookers – they just don't always book every time.

Appendix 1 – Participating venues and performances selected for sampling

			Ballet/Opera		Contemporary Music and Dance		Theatre		Classical Music	
ENGLAND	Venue	Town	Sept	Nov	Sept	Nov	Sept	Nov	Sept	Nov
Large Scale	Hackney Empire	London	Cosi fan Tutte	Aida			Fruit Salad			Carmina Burana
	Lyceum Theatre	Sheffield		Swan Lake		Oh My Goddess				
	The Bridgewater Hall	Manchester							Tchaikovsky Gala Night	Halle
Medium Scale										
	The Marlowe Theatre	Canterbury	Aida	Swan Lake/ Nutcracker				Oh, What a night		
	West Yorkshire Playhouse	Leeds	Dangerous Liaisons				The Glee Club	Ying Tong		
	Gordon Craig Theatre	Stevenage	Romance in Vienna					Out of Order		
	Turner Simms Concert Hall	Southampton				Sam River Trio & Band, World Music				
Small Scale										

			Ballet/Opera		Contemporary Music and Dance		Theatre		Classical Music	
	MAC	Birmingham			Liz Lea and Synergy			Bent		
	The Old Laundry Theatre	Bowness on Windermere							The Lindsays	The Hanover Band
	Gardener Arts Centre	Brighton				Ricochet Dance Co.		Bloody Mess		
	Lakeside Arts Centre	Nottingham	Opera North, Tango Passionado			Henri Oguike				Brightlights Trio
	The Music Hall	Shrewsbury		The Nutcracker						Jacque Loussier Trio
	Roses Theatre	Tewkesbury			Ballet Boyz			The Caretaker		
WALES										
Medium Scale										
	Theatr Brycheiniog	Brecon			Diversions Dance Co	Richard Alston Dance Co.				

			Ballet/Opera		Contemporary Music and Dance		Theatre		Classical Music	
	Theatr Gwynedd	Bangor				Diversions, Dance Co. of Wales	Lysh			
SCOTLAND										
Large scale										
	King's Theatre	Glasgow					Fame	Miss Saigon, Full Monty		
	His Majesty's Theatre	Aberdeen	Carmen							Scottish Chamber Orch
Medium Scale										
	Eden Court Theatre	Inverness							Royal Scottish National Orchestra	Scottish Chamber Orchestra
TOTAL	18 venues		10 performances		10 Performances		12 Performances		10 Performances	

Appendix 2 – Survey form

Arts Council Audience Survey

NOTE FOR THE INTERVIEWER: The instructions and questions typed in blue are for the interviewer's use only. These should not be read out to the respondent.

Questions 1 to 2 below to be completed before interview

Q1 What attender type is the respondent?

- Advance booker..... 1
 Walk-up booker..... 2
 Non-booker..... 3

**Q2 Which performance did the respondent attend?
 (Venues are listed in alphabetical order)**

- | | | | |
|--|-----------------------------|---|-----------------------------|
| Eden Court Theatre, Royal Scottish National Orchestra..... | <input type="checkbox"/> 01 | Roses Theatre, Swan Lake..... | <input type="checkbox"/> 23 |
| Eden Court Theatre, Scottish Chamber Orchestra..... | <input type="checkbox"/> 02 | Roses Theatre, Up Close and Personal..... | <input type="checkbox"/> 24 |
| Gardener Arts, Ricochet dance..... | <input type="checkbox"/> 03 | Roses Theatre, Henri Oguike..... | <input type="checkbox"/> 25 |
| Gardener Arts, Bloody Mess..... | <input type="checkbox"/> 04 | The Bridgewater Hall, Tchaikovsky Gala Night..... | <input type="checkbox"/> 26 |
| Gordon Craig Theatre, Romance in Vienna..... | <input type="checkbox"/> 05 | The Bridgewater Hall, Halle..... | <input type="checkbox"/> 27 |
| Gordon Craig Theatre, Out of Order..... | <input type="checkbox"/> 06 | The Marlowe Theatre, Aida..... | <input type="checkbox"/> 28 |
| Hackney Empire, Cosi fan Tutte..... | <input type="checkbox"/> 07 | The Marlowe Theatre, Swan Lake/Nutcracker..... | <input type="checkbox"/> 29 |
| Hackney Empire, Aida..... | <input type="checkbox"/> 08 | The Marlowe Theatre, Oh What a Night..... | <input type="checkbox"/> 30 |
| Hackney Empire, Fruit Salad..... | <input type="checkbox"/> 09 | The Music Hall, The Nutcracker..... | <input type="checkbox"/> 31 |
| Hackney Empire, Carmina Burana..... | <input type="checkbox"/> 10 | The Music Hall, Jacques Loussier Trio..... | <input type="checkbox"/> 32 |
| His Majesty's Theatre, Carmen..... | <input type="checkbox"/> 11 | The Old Laundry, The Lindsays..... | <input type="checkbox"/> 33 |
| His Majesty's Theatre, Scottish Chamber Orchestra..... | <input type="checkbox"/> 12 | The Old Laundry, The Hanover Band..... | <input type="checkbox"/> 34 |
| King's Theatre, Fame..... | <input type="checkbox"/> 13 | Theatr Brycheiniog, Diversions Dance..... | <input type="checkbox"/> 35 |
| King's Theatre, Chicago..... | <input type="checkbox"/> 14 | Theatr Brycheiniog, Richard Alston Dance Co..... | <input type="checkbox"/> 36 |
| King's Theatre, Miss Saigon..... | <input type="checkbox"/> 15 | Theatr Gwyned, Diversions Dance..... | <input type="checkbox"/> 37 |
| Lakeside Arts, Tango Passiona..... | <input type="checkbox"/> 16 | Theatr Gwyned, Lyshe..... | <input type="checkbox"/> 38 |
| Lakeside Arts, Hengi Oguike..... | <input type="checkbox"/> 17 | Turner Sims, Sam River Trio..... | <input type="checkbox"/> 39 |
| Lakeside Arts, Brightlights Trio..... | <input type="checkbox"/> 18 | Turner Simes, World Music..... | <input type="checkbox"/> 40 |
| Lyceum Theatre, Swan Lake..... | <input type="checkbox"/> 19 | West Yorkshire Playhouse, Dangerous Liaisons..... | <input type="checkbox"/> 41 |
| Lyceum Theatre, Oh My Goddess..... | <input type="checkbox"/> 20 | West Yorkshire Playhouse, The Glee Club..... | <input type="checkbox"/> 42 |
| MAC, Liz Lea and Synergy..... | <input type="checkbox"/> 21 | West Yorkshire Playhouse, Ying Tong..... | <input type="checkbox"/> 43 |
| MAC, The Smallest Person..... | <input type="checkbox"/> 22 | | |

BEGIN INTERVIEW

Hello, we are conducting research on behalf of the Arts Council and wondered if you could help us by answering a few questions about your recent visit to (name of venue). It will take about 5 minutes and the answers you give will be confidential. If you like we can enter your name into a prize draw and the winner will be awarded £200 worth of book and music tokens.

First, please think about the performance you most recently attended at (name of venue)

Q3 What was it about this event that particularly made you want to attend?

TICK A MAXIMUM OF THREE THAT FIT THEIR ANSWER

- Interested in the topic or subject of the performance..... 1
- The reputation of the company, Director, writer, choreographer or performers..... 2
- Thought it would be interesting for the children..... 3
- Friends or family were coming so I came too..... 4
- Know one of the performers or production team..... 5
- To mark a special occasion for someone in my party..... 6
- Other..... 7

Q4 Thinking about your ticket price now, in which of the following price bands were your tickets: READ LIST AND TICK ONE

- Top end..... 1
- The middle..... 2
- or the lower end..... 3
- There was only one band..... 4
- Don't know..... 5

Q5 WALK UPS ONLY I believe that you bought your ticket shortly before the event. Do you usually buy at the last minute for these type of events?

TICK ONE THAT MOST CLOSELY APPLIES

- Always..... 1
- Most of the time..... 2
- Sometimes..... 3
- Occasionally..... 4
- First time done this..... 5
- Don't usually attend..... 6

Q6 WALK UPS ONLY What was the MAIN REASON why you bought your ticket on the door rather than book in advance?

TICK ONE THAT MOST CLOSELY FITS

- It was a last minute decision to attend..... 1
- Didn't hear about the event until the last minute..... 2
- I didn't get around to booking in advance.. 3
- I didn't want to commit myself in advance. 4
- I knew there would be seats available..... 5
- To take advantage of a discount offer on tickets..... 6
- Other..... 7

Q7 WALK UPS ONLY What other reasons, if any, led to you buying your ticket on the door rather than booking in advance?

TICK UP TO TWO

- None..... 1
- It was a last minute decision to attend..... 2
- Didn't hear about the event until the last minute..... 3
- I didn't get around to booking in advance.. 4
- I didn't want to commit myself in advance. 5
- I knew there would be seats available..... 6
- To take advantage of a discount offer on tickets..... 7
- Other..... 8

Q8 ADVANCE BOOKERS ONLY I believe that you personally booked the tickets for this event. Is it usually you that takes responsibility for booking tickets for these type of events?

TICK ONE THAT MOST CLOSELY APPLIES

- Always..... 1
- Most of the time..... 2
- Sometimes..... 3
- Occasionally..... 4
- First time done this..... 5
- Don't usually attend..... 6

Q9 ADVANCE BOOKERS ONLY What is the MAIN reason why you booked your tickets in advance

TICK ONE THAT MOST CLOSELY APPLIES

- To ensure that I got seats of my choice..... 1
- I was concerned that I may not get tickets if I left it too late..... 2
- I just wanted to plan ahead and make sure that it was in the diary..... 3
- I wanted to book tickets whilst it was in in my mind (otherwise if I had left it until later I may have forgotten to book)..... 4
- To take advantage of a discount offer on tickets..... 5
- Other..... 6

Q10 NON-BOOKERS ONLY I believe that someone else in your party booked the tickets. Do you ever personally book tickets for these type of events?

TICK ONE THAT MOST CLOSELY APPLIES

- Most of the time..... 1
- Sometimes..... 2
- Occasionally..... 3
- Never..... 4
- Don't usually attend..... 5

Now please think about the group of people that you went to the theatre with

Q11 Did you attend the event with other people?
TICK ONE

- Yes 1
No 2

Q12 Who did you go with?
TICK ONE THAT MOST CLOSELY APPLIES

- With your spouse/partner 1
In a family group 2
With one or more friends 3
With one or more friends from work 4
On an organised visit 5
Other 6

We are interested in finding out more about the people you attended the event with, please include yourself when you provide your answer

Q13 How many MALES in your party were in the following age bands?
READ OUT THE BANDS AND WRITE THE NUMBER OF PEOPLE INCLUDING THE RESPONDENT IN THE APPROPRIATE BOXES

- Under 5yrs
5-11yrs
12-15yrs
16-24yrs
25-34yrs
35-44yrs
45-54yrs
55-64yrs
65+

Q15 How many people, including yourself, would describe their ethnic origin using the categories I'm going to read out:
READ OUT AND WRITE NUMBER

- White (British, Irish, any other)
Asian or British Asian (Indian, Pakistani, Bangladeshi, any other).....
Black or British Black (African, Carribean, any other)
Chinese
Mixed Heritage (Asian and White, Black African or Carribean and White, Chinese and White, any other)
Any other ethnic group
Declined to answer

Q14 How many FEMALES in your party were in the following age bands?
READ OUT THE BANDS AND WRITE THE NUMBER OF PEOPLE INCLUDING THE RESPONDENT IN THE APPROPRIATE BOXES

- Under 5yrs
5-11yrs
12-15yrs
16-24yrs
25-34yrs
35-44yrs
45-54yrs
55-64yrs
65+

Q16 Including yourself, was there anybody in your party that has a long-standing illness, disability or infirmity?

Notes: By long-standing I mean anything that has troubled you or someone in your party or that is likely to affect you over a period of time?

- TICK ONE
Yes 1
No 2

And finally some questions about you

Q17 Including your most recent visit, approximately how many times have you attended a performance at this venue in the last 12 months?

TICK ONE

- Once 1
- 2-3 times 2
- 4-5 times 3
- 6-10 times 4
- More than 10 times 5

Q18 How many times a year do you think you attend live performances such as concerts, theatre, dance performances etc?

TICK THE ANSWER THAT BEST APPLIES TO THEM

- Once a year (1) 1
- Twice a year (2) 2
- Once every two or three months (4-6) 3
- Once a month (12) 4
- Twice a month (24) 5
- Weekly or more often (50+) 6

Q19 Which of the following best describes your current working status?

READ LIST AND TICK ONE

- Full-time working 1
- Part-time working 2
- Full-time studying/training 3
- Part-time studying/training 4
- Retired 5
- Homemaker 6
- Other 7

Q20 What is your postcode?

WRITE IN FULL

Q21 And finally, would you like to be entered into the prize draw?

- Yes 1
- No 2

The prize draw will take place by 7th December 2004 and the winner will be notified by 14th December 2004

THANK YOU VERY MUCH FOR YOUR HELP

After the interview, please note the gender of the respondent

Q22 Gender

- Female 1
- Male 2

Q23 If the respondent wishes to enter the prize draw, enter name and telephone number below

Name

Telephone number

Appendix 3 – List of survey tables

		Advance booker		Walk-up booker		Non-booker	
Base		435		118		273	
Missing	No reply	2		-		-	
Gender	Female	290	66.7%	70	59.3%	196	71.8%
	Male	143	32.9%	48	40.7%	77	28.2%
			100%		100%		100%

Table 1 Gender of the respondent by attender type

	Advance booker		Walk-up booker		Non-booker	
Base	435		118		273	
No reply	2	0%	-		1	0%
Working full-time	155	36%	56	47%	100	37%
Working part-time	77	18%	15	13%	42	15%
Studying/training full time	15	3%	8	7%	27	10%
Studying/training part time	3	1%	1	1%	6	2%
Retired	160	37%	28	24%	79	29%
Homemaker	12	3%	4	3%	9	3%
Other	11	3%	6	5%	9	3%
		100%		100%		100%

Table 2 Employment status

	Advance booker		Walk-up booker		Non-booker	
Base	435		118		273	
No reply	-		-		1	0%
Once	80	18%	19	16%	70	26%
2-3 times	116	27%	31	26%	70	26%
4-5 times	93	21%	26	22%	65	24%
6-10 times	90	21%	25	21%	46	17%
More than 10 times	56	13%	17	14%	21	8%
		100%		100%		100%

Table 3 Number of times attended a performance at the venue in the last 12 months

	Advance booker		Walk-up booker		Non-booker	
Base	435		118		273	
No reply	2	0%	-		1	0%
Once a year (1)	10	2%	5	4%	11	4%
Twice a year (2)	41	9%	10	8%	26	10%
Once every two or three months (4-6)	142	33%	40	34%	106	39%
Once a month (12)	135	31%	33	28%	75	27%
Twice a month (24)	81	19%	18	15%	39	14%
Weekly or more often (50+)	24	6%	12	10%	15	5%
		100%		100%		100%

Table 4 Number of times a year attend live performances

	Advance booker		Walk-up booker		Non-booker	
Base	433		119		274	
No reply	2	0%	-		2	1%
Interested in the topic or subject of the performance	279	64%	69	58%	166	61%
The reputation of the company, Director, writer, choreographer or performers	136	31%	49	41%	81	30%
Thought it would be interesting for the children	10	2%	3	3%	2	1%
Friends or family were coming so I came too	17	4%	2	2%	32	12%
Know one of the performers or production team	26	6%	4	3%	17	6%
To mark a special occasion for someone in my party	6	1%	2	2%	3	1%
Other	55	13%	12	10%	33	12%
	531		141		336	

Table 5 Motivation for attending

	Advance booker		Walk-up booker		Non-booker	
Base	435		118		273	
No reply	4	1%	1	1%	3	1%
Top end	115	26%	22	19%	55	20%
The middle	106	24%	32	27%	61	22%
The lower end	63	14%	28	24%	38	14%
There was only one band	87	20%	16	14%	53	19%
Don't know	60	14%	19	16%	63	23%
		100%		100%		100%

Table 6 Ticket price band

Age	Advance bookers		Walk-ups bookers		Non-bookers	
Male U5	26	7%	2	1%	14	5%
M5-11	5	1%	2	1%	4	1%
M12-15	13	3%	3	2%	2	1%
M16-24	21	6%	26	17%	49	16%
M25-34	34	9%	22	14%	31	10%
M35-44	44	12%	27	18%	39	13%
M45-54	73	19%	31	20%	49	16%
M55-64	88	23%	19	13%	68	22%
M65+	74	20%	20	13%	48	16%
Sub total	378	100%	152	100%	304	100%
Female U5	33	5%	4	2%	9	1%
F5-11	21	3%	13	6%	9	1%
F12-15	26	4%	7	3%	69	10%
F16-24	53	7%	69	31%	170	24%
F25-34	67	9%	33	15%	50	7%
F35-44	129	18%	27	12%	59	8%
F45-54	141	19%	31	14%	110	15%
F55-64	141	19%	19	9%	140	19%
F65+	116	16%	20	9%	103	14%
sub total	727	100%	223	100%	719	100%
Total	1105		375		1023	

Table 7 Age and gender of attenders

	Advance booker		Walk-up booker		Non-bookers	
White	980	93%	259	90%	916	94%
Asian	10	1%	1	0%	20	2%
Black	37	3%	20	7%	23	2%
Chinese	5	1%	0	0%	1	0%
Mixed race	4	0%	4	1%	3	0%
Other	7	1%	0	0%	5	1%
Prefer not to say	11	1%	3	1%	3	0%
TOTAL	1054	100%	287	100%	971	100.0%

Table 8 Ethnic origin of attenders

	Advance booker		Walk-up booker		Non-booker	
Base	435		118		273	
No reply	5	1%	-		3	1%
Yes	55	13%	14	12%	46	17%
No	370	85%	103	87%	222	81%
Prefer not to say	5	1%	1	1%	2	1%

Table 9 Disability of attenders

	Advance booker		Walk-up booker		Non-booker	
Base	435		118		273	
With your spouse/partner	141	32%	29	25%	74	27%
In a family group	85	20%	20	17%	50	18%
With one or more friends	139	32%	32	27%	111	41%
With one or more friends from work	3	1%	1	1%	5	2%
On an organised visit	2	0%	2	2%	11	4%
On my own	61	14%	32	27%	18	7%
Other	4	1%	2	2%	4	1%
		100%		100%		100%

Table 10 Type of visiting party

Base	435	
No reply	2	0%
Always	275	63%
Most of the time	86	20%
Sometimes	51	12%
Occasionally	16	4%
First time done this	3	1%
Don't usually attend	2	0%
		100%

Table 11 Advance bookers: Frequency of taking responsibility for booking tickets

Base	435	
No reply	3	1%
To ensure that I got seats of my choice	211	49%
I was concerned that I may not get tickets if I left it too late	134	31%
I just wanted to plan ahead and make sure that it was in the diary	46	11%
I wanted to book tickets whilst it was in my mind (otherwise if I had left it until later I may have forgotten to book)	6	1%
To take advantage of a discount offer on tickets	16	4%
Other	19	4%
		100%

Table 12 Advance bookers: Main reason for booking tickets In advance

	Opera/ballet		Drama		Contemporary dance/music		Classical	
Base	113		114		93		113	
Always	79	70%	69	61%	53	57%	74	65%
Most of the time	20	18%	22	19%	23	25%	21	19%
Sometimes	11	10%	12	11%	13	14%	15	13%
Occasionally	2	2%	8	7%	3	3%	3	3%
First time done this	1	1%	2	2%	-		-	
Don't usually attend	-		1	1%	1	1%	-	
		100%		100%		100%		100%

Table 13 Advance bookers cross tabulated with artform – frequency of booking own tickets

Base	118	
No reply	9	8%
Always	18	15%
Most of the time	23	19%
Sometimes	26	22%
Occasionally	28	24%
First time done this	13	11%
Don't usually attend	1	1%
		100%

Table 14 Walk-ups: Frequency of buying tickets at the last minute

Base	118	
No reply	12	10%
It was a last minute decision to attend	35	30%
Didn't hear about the event until the last minute	5	4%
I didn't get around to booking in advance	5	4%
I didn't want to commit myself in advance	19	16%
I knew there would be seats available	1	1%
To take advantage of a discount offer on tickets	19	16%
Other	22	19%
		100%

Table 15 Walk-ups: Main reason for buying tickets on the door

Base	118	
No reply	14	12%
None	76	64%
It was a last minute decision to attend	11	9%
Didn't hear about the event until the last minute	-	
I didn't get around to booking in advance	2	2%
I didn't want to commit myself in advance	2	2%
I knew there would be seats available	3	3%
To take advantage of a discount offer on tickets	5	4%
Other	5	4%
		100%

Table 16 Walk-ups: Other reasons for buying on the door

Base	273	
No reply	-	
Most of the time	67	25%
Sometimes	84	31%
Occasionally	65	24%
Never	52	19%
Don't usually attend	5	2%
		100%

Table 17 Non-bookers: Frequency of booking tickets

Appendix 4 - Data analysis - list of other tables

	Base	Small	Medium	Large
Walk-up	1127	45.1%	27.4%	27.5%
All bookers	23185	22.5%	31.0%	46.5%

Table 18 Booker type by venue size

Attender type ratio	Base	Advance Bookers	Walk-up Bookers
All	23,185	95.1%	4.9%
Small Scale	5,206	90.2%	9.8%
Medium Scale	7,198	95.7%	4.3%
Large Scale	10,781	97.1%	2.9%

Table 19 Ratio of advance bookers to walk-ups by venue scale

Value	Base	Advance Bookers	Walk-up Bookers
All	23,185	97.3%	2.7%
Small Scale	5,206	94.4%	5.6%
Medium Scale	7,198	97.4%	2.6%
Large Scale	10,781	98.1%	1.9%

Table 20 Proportional value of booker types by venue scale

	Frequency	Percent
Comedy	3	13.6%
Other music	4	18.2%
OPCMD	1	4.5%
Other music	1	4.5%
Theatre	13	59.1%
Total	22	100.0%

Table 21 Events with more than 25% walk-up bookers by event type

	Base	Small	Medium	Large
All WU	1127	45.1%	27.4%	27.5%
All bookers	23185	22.5%	31.0%	46.5%
Comedy WU	27	77.8%	0.0%	22.2%
Comedy bookers	974	25.1%	16.4%	58.5%
Other music WU	127	74.8%	2.4%	22.8%
Other music bookers	3422	34.5%	39.5%	25.9%
OPCMD WU	287	26.8%	12.2%	61.0%
OPCMD bookers	7003	10.1%	11.1%	78.8%
Other WU	79	35.4%	1.3%	63.3%
Other bookers	2959	17.4%	24.9%	57.7%
Theatre WU	607	47.3%	44.5%	8.2%
Theatre bookers	8827	29.0%	47.3%	23.8%

Table 22 Distribution to walk-up bookers within event type by distribution of all bookers within artform

Appendix 5 – Key Features of Mosaic Groups

A	B	C	D	E
Middle-aged Successful Rewarding careers Professional occupations High incomes High net worth Choicest housing Expensive cars Exotic leisure pursuits %Households 9.62	Young couples Good education Corporate careers Low unemployment Good prospects Modern homes Internet Cable and Sky TV Kitting out homes % Households 10.76	Married couples Older children White collar workers Hardworking Comfortable homes Mature suburbs Plan for retirement Self reliant Independent % Households 15.10	Young couples Children Family close by Older houses Small industrial towns Traditional Close knit communities Foreign package holidays Takeaways % Households 16.04	Young singles Few children Well educated Full time students Professionals Open-minded Cosmopolitan tastes Liberal views Cultural variety % Households 7.19

F	G	H	I	J	K
<p>Families Many young children Low incomes State benefits High deprivation Council housing Public transport Heavy watchers of TV Use cash</p> <p>% Households 6.43</p>	<p>Families Low incomes Terraces and semis Large council estates Outer suburbs Large provincial towns Old fashioned Pay bills at Post Office Heavy TV viewing</p> <p>% Households 6.71</p>	<p>Middle aged couples Mostly poorly educated Council estates Small towns Exercised Right to Buy Self reliant and capable Straight talking Like to shop around Heavy viewers of TV</p> <p>% Households 11.01</p>	<p>Older people Low incomes Low savings State benefits Some small bungalows Some sheltered accommodation TV popular Bingo, dominoes, cards Look forward to visits</p> <p>% Households 3.88</p>	<p>Pensioners Relocated on retirement Own their homes Index linked pensions Significant capital Active Good health Principles/prejudices Prefer face-to-face service</p> <p>% Households 7.88</p>	<p>Older people Small communities Distinct rural life Farming Agro-tourism Work long hours Cars important Churchgoers Authenticity</p> <p>% Households 5.39</p>

Appendix 6 - Sample of venue forms

Arts Councils of England, Scotland and Wales Audience Research

Step by step guide for participating venues

Step 1. Select performances for sampling

We only need to sample one performance for each event (if it runs more than one night). Please select a performance for collecting data. We would suggest that you select a performances that are likely to have the most walk-ups.

Step 2. Collect data for 'Non-booking attenders'

We request that you appoint one member of your front of house team to approach attenders at the selected performance. The task will be to obtain names and contact telephone numbers from a sample of 12 people who did not book their own ticket and who agree to respond to a telephone interview.

The member of staff should approach people walking through the door on a randomised basis (e.g. every other party or after approaching one party go onto the next one that walks through the door). A 'non-booker' form for collecting contact details is attached with these Guidelines. This form **must** be faxed back to us the **next day**. (The fax number is on the bottom of the form).

Step 3. Collect data for 'Walk-ups'

For each selected performance, make a special effort to capture names, contact numbers and full postcodes of as many 'walk-up bookers' as possible. In most cases a 'Walk-up' will be defined as someone who purchases their ticket within 1 hour of the performance starting.

Step 4. Collect data for 'Advance bookers' for selected performances

For each selected performance, capture names and contact numbers for all 'Advance bookers' as you would normally do through your box office system.

Step 5. Email to us data collected in Steps 3 and 4 above

In order that the content of the research is still relevant to the interviewee, we will aim to conduct interviews no longer than 2 weeks after the performance. Could you please, therefore, email your box office data (Walk-ups and Advanced Bookers) in a format, which can be imported into Excel **the day after** the performance to brenda.evans@audience.co.uk

In order that we can collate data from a number of venues and events scheduled on different dates within a short time frame, it is imperative that this deadline is adhered to.

Step 6. Undertake basic box office analysis

In order to determine the distribution of each attender type, please analyse around 4 similar previous events (that didn't sell out) to the events selected for research indicating how many attenders fall into 'Advanced booker', 'Non-booker' and 'Walk-up'. Please **complete** the Distribution of Attender Type form attached with these guidelines and **email or fax back** to us at the same time as the 'Non-Booker' contact details form i.e. the **day after** the first selected performance.

Thank you very much for your assistance with this research.

You will receive your own report benchmarked against the full sample by end of January 2005.

If you have any further queries, please do not hesitate to contact Tina Neill.
Telephone: 01394 388029, email: tina.neill@audience.co.uk

Arts Councils of England, Scotland and Wales
Audience Research

Distribution of Attender Type Form

In order to determine the distribution of each attender type, please analyse around 4 similar previous events (that didn't sell out) to the events selected for research indicating how many attenders fall into 'Advanced booker', 'Non-booker' and 'Walk-up'.

Definitions:

- **Advanced booker**
An attender who has booked ticket/s in advance (up to 1 hour) of the performance
- **Walk-up**
An attender who purchases ticket/s within one hour of the performance starting
- **Non-booker**
Attendees who do not book their own tickets

Please complete the form below:

- Step 1.** Enter the total number of seats sold in the first column
Step 2. Enter the number of unsold seats in the second column
Step 3. Enter the number of advanced bookers (captured on your box office system less the walk-ups) in the third column 'no. of bookers'
Step 4. Enter the number of walk-up bookers in column 4 (captured on your box office records and defined by time of transaction i.e. 1 hour before the performance start time)
Step 5. In the last column enter the total number of non-bookers i.e. subtract the number of bookers (advanced bookers and walk-ups) from the total number of seats sold

	Total no. of seats sold	Total no. of seats unsold	No. of advance bookers	No. of walk-up bookers	No. of non-bookers
Event 1					
Event 2					
Event 3					
Event 4					
TOTAL					

Venue name: _____ **Town** _____

Please **email** or **fax back** to Cultural Intelligence the **day after** the first selected performance:

Email: Brenda.Evans@audience.co.uk

Arts Councils of England, Scotland and Wales
Audience Research

Distribution of Attender Type Form

In order to determine the distribution of each attender type, please analyse around 4 similar previous events (that didn't sell out) to the events selected for research indicating how many attenders fall into 'Advanced booker', 'Non-booker' and 'Walk-up'.

Definitions:

- **Advanced booker**

An attender who has booked ticket/s in advance (up to 1 hour) of the performance

- **Walk-up**
An attender who purchases ticket/s within one hour of the performance starting
- **Non-booker**
Attendees who do not book their own tickets

Please complete the form below:

- Step 1.** Enter the total number of seats sold in the first column
Step 2. Enter the number of unsold seats in the second column
Step 3. Enter the number of advanced bookers (captured on your box office system less the walk-ups) in the third column 'no. of bookers'
Step 4. Enter the number of walk-up bookers in column 4 (captured on your box office records and defined by time of transaction i.e. 1 hour before the performance start time)
Step 5. In the last column enter the total number of non-bookers i.e. subtract the number of bookers (advanced bookers and walk-ups) from the total number of seats sold

	Total no. of seats sold	Total no. of seats unsold	No. of advance bookers	No. of walk-up bookers	No. of non-bookers
Event 1					
Event 2					
Event 3					
Event 4					
TOTAL					

Venue name: _____ **Town** _____

Please **email** or **fax back** to Cultural Intelligence the **day after** the first selected performance:

Email: Brenda.Evans@audience.co.uk

Appendix 7 – quality control and client approval

Survey

The data was analysed using SNAP survey software. The main focus of the analysis was to identify any significant differences between the three types of attender.

The methodology included the following quality control measures and opportunities for client review.

- Client approval of the sample frame
- Client approval of the long list of venues
- Client approval of survey questionnaire
- Active support of venues collecting and supplying sample

For fieldwork:

- Full interviewer briefing
- Status reports from fieldwork partner highlighting any interviewing issues
- Interviews monitored via remote listening
- All interviews tape recorded
- 10% validation through monitoring/taping, as above
- Client status reports
- Discussion of preliminary main findings with client
- Client review of draft report

Data analysis

The data was analysed using SPSS statistical software.

The methodology included the following quality control measures and opportunities for client review.

- Client approval of the long sample list
- Regular status reports to steering group
- Four complete iterations of the analysis
- Client review of draft report