

- **Most families just dip into the arts – on average they bought for 2.8 family performances or screenings over four years**
- **Pantomime audiences don't just see panto – 60% have been back and bought for other artforms**
- **Families need a flexible ticket format – just a fifth came as a party of four**

Audience Insight Wales is an Arts Council Wales project delivered by Clearview to help arts organisations understand and develop their audiences by collecting, analysing and interpreting data. This is the second of a series of bulletins exploring themes emerging from the data. For further information please go to <http://www.clearviewbusiness.com/solutions/audience-insight-wales/>

You and your colleagues have bought the booster cushions, introduced a child friendly menu to your café and set up the buggy park. But how much do you know about the families who flock to the rich array of events you've designed just for them? Probably less than you think.

You don't have time to wrestle your data into any kind of shape. Thanks to Audience Insight Wales, I do. I've analysed the 716,000 tickets bought by 67,000 unique individuals for 10,428 family performances and screenings between 2012/13 and 2015/16 at 21 venues in Wales.¹

So, why is your data likely to be misleading?

The Family Arts Campaign defined a family group attending an arts event as someone under 16 attending with someone over 16. But in most venues' ticketing data, a family group is impossible to spot. Some don't differentiate between different kinds of concessions so it's impossible to see if someone is a senior citizen, a student or a child. Others don't offer discounts for children, preferring to have just one relatively low price for everyone (although the expert advice is that people expect lower prices for kids²). Some have child discounts for some events but not others. That means that we can't see what a family group consists of.

I've resorted to defining families as those attending particular kinds of event in groups of 15 or fewer. But what should those events be? Audience Insight Wales translates the event categories used by each venue into the standard artform classifications recommended by Arts Council Wales. So I started with every event categorised as children's and youth theatre. This classification includes

¹ The venues are Aberystwyth Arts Centre; Beaufort Theatre, Blaenau Gwent; Chapter, Cardiff; Theatr Clwyd, Mold; Congress Theatre, Cwmbran; Gwyn Hall, Neath; Pontardawe Arts Centre, ; Princess Royal Theatre, Port Talbot; Royal Welsh College of Music & Drama, Cardiff; Sherman Cymru, Cardiff; Taliesin Arts Centre, Swansea; The Metropole, Abertillery; The Riverfront Theatre, Newport; Theatr Brycheiniog, Brecon; Theatr Colwyn, Colwyn Bay; Theatr Felinfach, Aeron Valley, Lampeter; Theatr Mwldan, Cardigan; Torch Theatre, Milford Haven; Venue Cymru, Llandudno; Wales Millennium Centre, Cardiff; Wyeside Arts Centre, Builth Wells.

² Baker Richards, *Pricing Family Events: guidance for arts organisations*, Family Arts Campaign, 2015 p4 – download it at <http://www.familyarts.co.uk/resources/toolkits/pricing-family-events/>

professional theatre aimed at children, Youth Theatre involving children on stage, and Theatre in Education. Schools and organised groups have very different needs and behaviours to families. That meant I had to exclude all the events aimed at schools by looking for clues in the title and the event and price types – tedious to say the least.

I then added Pantomime from the nine venues that programme it. At least that was straight forward – mostly.

What about family films? Ten of the venues screened films and collected customer data from ticket buyers for cinema. (A couple more just sold every ticket on the door to a generic customer record. Not helpful.) But most did not consistently differentiate between different types of film. So I focused on films with a U or PG classification and looked up every unclassified film to identify those unsuitable for the under 12s. Then I had to identify the U and PG films that clearly had little to appeal to children eg Orson Welle’s classic drama, *The Magnificent Ambersons* (U).

Schools and groups go to events aimed at children so I needed to exclude them. Some venues attach a label to schools and groups bookings. Others have specific price types. But none were consistent. The only way to exclude non-families was to spend a couple of hours going through every transaction looking for clues in the surname field. Even I got bored.

I had to abandon workshops and classes altogether. Some venues just label them as children’s events without specifying that they are participatory. That’s a problem because people approach attendance and participation in very different ways. Others don’t differentiate between workshops aimed at adults and children. And many venues don’t sell regular classes through their ticketing system at all.

Why am I whinging? Because, if I’m struggling, you will be too. Families need different information from everyone else³ so we need to be able to spot them. It’s easy to fix:

- offer child price tickets (even if you believe a single ticket price is best, set up child and adult tickets at the same price and ask how many children are in the party)
- give a specific category to family films
- categorise schools and groups consistently
- give a specific category to workshops and classes aimed at children.

So, many, many hours later I had a reasonable, but not perfect, data set. Here’s what it said.

We’re offering fewer performances and screenings

Over four years, the participating venues offered 1,827 performances of children’s and youth theatre, 932 pantomime performances and 7,669 screenings of family films. The total number of family performances and screenings fell by 8% in 2015/16 compared to 2014/15.

Twenty of the venues present children’s and youth theatre. The number of performances increased by 10% in 2013/14 compared to the previous year but fell by 11% in 2015/16 compared to 2014/15.

The number of family film screenings peaked in 2014/15, up 32% on the previous year. In 2015/16, however, the number dropped by 10% compared to 2014/15.

³ Creative Communities Unit, Staffordshire University, *Content Guidance: communication for family arts events*, Family Arts Campaign, 2015 – download it from <http://www.familyarts.co.uk/2015/03/new-pricing-content-guidance-research/>

Across the nine venues with pantomimes, the number of performances increased each year for the past three years, rising by 13% in 2015/16 compared to the previous year.

Families come in all sizes

On average, families attend performances of children's and youth theatre and family films in groups of 3.2 and 3.3 respectively. Around a third attended in pairs and a quarter in threes. Just a fifth came as a party of four – proof that families really do need a flexible ticket format.⁴

Families coming to pantomime tend to be in bigger groups – 4.7 people on average. Just under a quarter came in a group of four and a third in a group of between five and nine. Even so, 37% came in a party of fewer than four.

There are differences between audiences for different types of family event.

Audiences for our family events come from all sections of society. Over four years, 12% of ticket buyers for family performances and screenings were from the 20% most deprived areas in Wales according to the Welsh Index of Multiple Deprivation. That compares with 8% of all ticket buyers at the venues.

Families at children's and youth theatre are more likely to be from Communities First areas (12%) compared to audiences for pantomime (8%) and family films (7%).

Mosaic⁵ analysis also shows the diversity of family audiences. There are some differences across the different types of event. Both well-off and much less affluent families from rural areas are more likely to go to family films and pantomime than to children's and youth theatre. The reverse is true of the more affluent families in urban areas.

Most families just dip into the arts

Research by the Creative Communities Unit at Staffordshire University showed that we are competing with sports, friends and other interests for the attention of families⁶. We are not winning.

I looked at frequency in 2015/16 at children's and youth theatre, family films and Pantomime combined. And got depressed. So I took four financial years from 2012/13 to 2015/16 but didn't feel much better. On average, family ticket buyers purchased for 2.8 family performances or screening over those four years. Just 36% of ticket buyers for family events went to more than one. That includes all children's and youth theatre, pantomime and family film across all of the participating venues. OK, we might be missing some repeat visits because of the high doors sales for cinema but not that many because two thirds of cinema tickets at the participating venues are bought in advance.

If we look at the different types of family event, average frequency of purchase over four years at children's and youth theatre was the same as for family films at 1.9. Average frequency of purchase for pantomime is lower at 1.6 but that is not surprising as there is usually only one pantomime per year.

⁴ Baker Richards (2015), p9 – they found that people are more likely to expect discounts for children than a family package and suggest alternatives. There is even a flowchart to help you decide what's best for your organisation.

⁵ Mosaic is a geodemographic segmentation system created by Experian that divides the UK population into clusters depending on the characteristics of their neighbourhood.

⁶ Creative Communities Unit, (2015) p11

We do have a core audience that goes to a family event at least every two months but they make up just 5% of family ticket buyers.

Why do so many ticket buyers purchase for just one event? It's not because they are seeing family events at other arts venues. Even in Cardiff, only 21% of the ticket buyers who bought for two or more events did so at more than one of the four participating Cardiff venues.

The majority of families crossover between different types of family event

Let's just look at ticket buyers for more than one family performance or screening over four years:

- Ticket buyers for pantomime are most likely to have seen another type of family event with 22% also buying for children's and youth theatre and 37% also buying for family films.
- 20% of ticket buyers for children's and youth theatre have also bought for family films and 25% have also bought for pantomime.
- The biggest crossover is between family films and pantomime (38%) with 18% of ticket buyers for family film also buying for children's and youth theatre.

Pantomime audiences don't just see panto

30% of ticket buyers for pantomime have only been to that one event over four years. If they come back, they are much more likely to buy for another artform than to stick to panto. 9% have been to more than one event over four years and only to pantomime. 60% have been back and bought for other artforms.

On average, ticket buyers for pantomime bought for 7 events from other artforms over four years.

Families like matinees

80% of tickets issued for children's and youth theatre and for family films were for daytime performances compared to 63% of tickets for pantomime.

Tickets are cheap

In early May 2016, tickets for the newly released The Angry Birds at Cineworld in Llandudno cost £8.60 for adults and £6.60 for children. This dropped to a single ticket price of £2 for a 10am screening of a less recent film, Alvin and the Chipmunks. How do we compare? Tickets for family films at Audience Insight Wales venues cost an average of £4.61. Tickets for children's and youth theatre were £7.99, falling to an average of £6.23 if shows at the Wales Millennium Centre are excluded. Pantomime tickets cost an average of £12.15.

So what? We are good at developing family audiences and we have so much to offer but we need to find better ways of persuading them to do more than dip their toes and disappear.

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