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What people think, feel and do

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research@opinium.com
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LIVE Music Trade body

Buying tickets

Key findings

28 June 2022

OPINIUM RESEARCH
58 Great Sutton St
London, EC1V 0DG
T +44 (0)20 7566 3190
research@opinium.com

Project details

PROJECT NUMBER	OP19536
PROJECT NAME	Buying tickets
CLIENT COMPANY NAME	LIVE Music Trade body
CLIENT CONTACT NAME	
CLIENT CONTACT EMAIL	
PROJECT MANAGER NAME	Isobel Hunt
PROJECT MANAGER EMAIL	isobelhunt@opinium.com
SAMPLE	2,000 UK adults aged 18+
FIELDWORK DATES	Friday 20th – Tuesday 24th May 2022

Life before the pandemic

Cinema, theatre, live shows and the pub have seen larger decreases in attendance than live music venues

Thinking about life before the pandemic, the most popular live music events were small concerts with just over a third (35%) attending at least once a year. These are followed by local music venues (33%), large concerts (28%), small festivals (25%) and large festivals (22%). By way of comparison, 70% of UK adults attended the pub at least once per year, 61% the cinema, 45% the theatre and 38% another type of live show, outside of music.

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Naturally, over the course of the pandemic attendance to these types of venues and events has changed. What is interesting to look at, is the difference between those who attended these at least once a year before the pandemic, and those who have attended these events over the last year.

The cinema has seen the largest absolute drop, a difference of 20% points, followed by the theatre, a difference of 17 percentage points.

When looking at the relative changes, pubs have seen the largest proportion of people return, but are still down by nearly 1 in 5 (18%). While this isn't good news for anyone, it does provide an interesting proxy for the disconnect between pre and post pandemic life, where low cost socialisation is not just less frequent than before but still out of reach for a large proportion of people.

Focussing on live music events, it is the mid-sized music venues who are still struggling to bring people back in, with 2 in 5 (40%) previous attendees not yet returning. The picture for grassroots music venues (-33%) and large concerts (-32%) is marginally better, but far from good.

The data around festivals is slightly worse than for gigs, but with festival season yet to fully take place in the UK, the similarity between pre and post pandemic numbers is encouraging.

For comparison, theatre goers (-40%) have been slightly more reluctant than music events overall. Other live entertainment has fallen by 34%, broadly in keeping with the music average.

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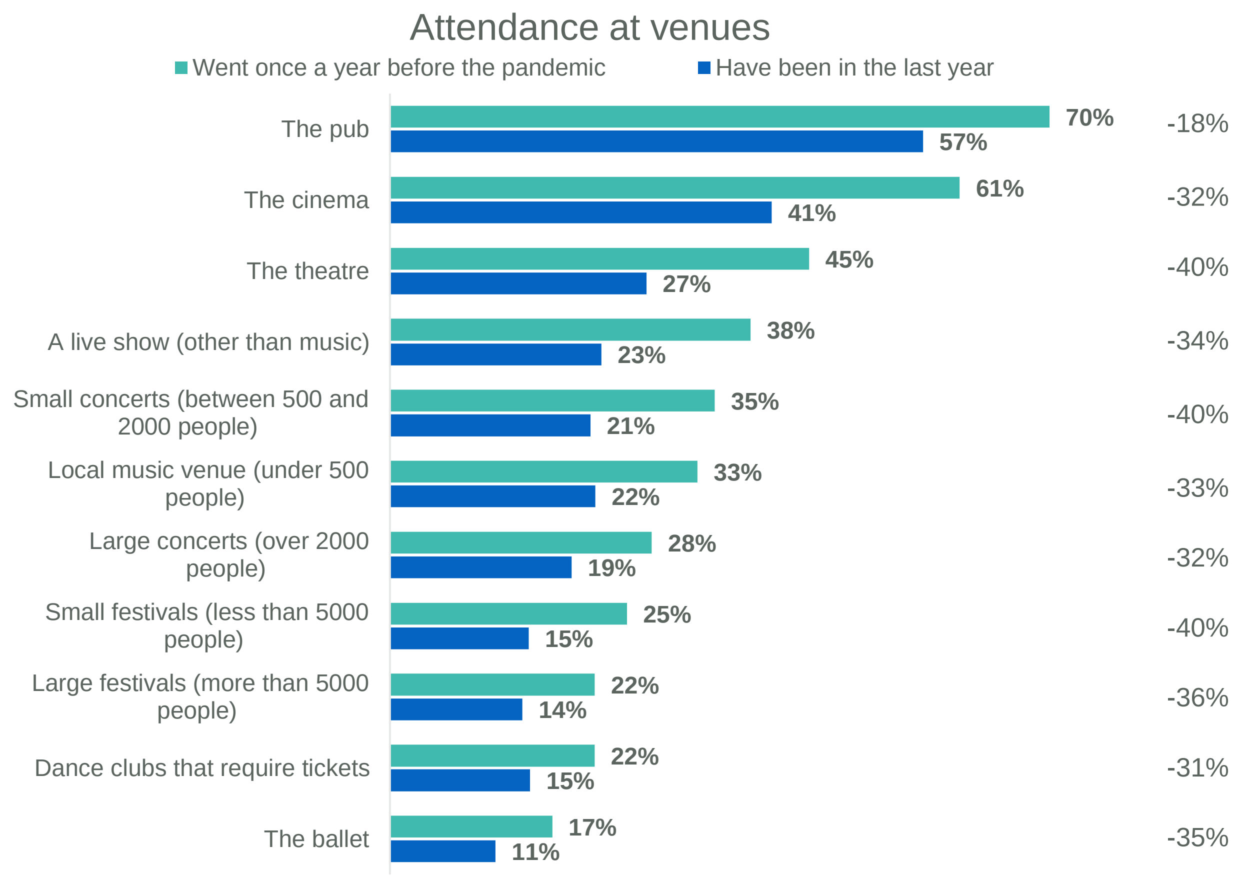


A quarter of UK adults hold tickets for live music events awaiting their rescheduled date

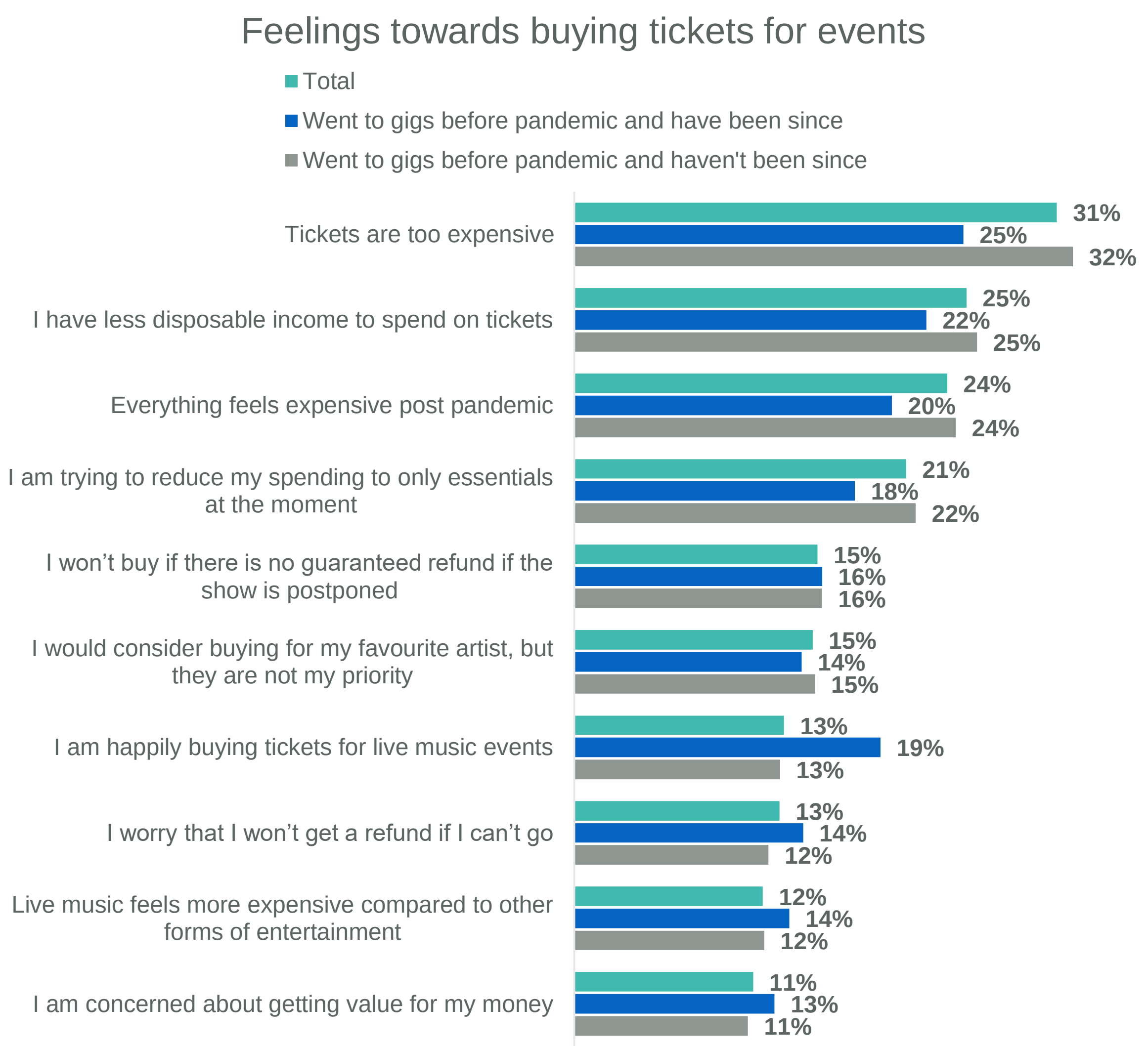
Over a quarter (28%) of UK adults hold tickets for live music events from during the pandemic that are still awaiting their rescheduled date. Amongst those who hold rescheduled tickets, on average they have tickets for 2.3 events, with males aged 25-34 holding tickets for 3 events on average. Of those who hold rescheduled events tickets, 14% are waiting until these events happen before booking new ones.

When it comes to concerns about live music events taking place, three fifths (59%) of UK adults hold concerns about live music events. Their top concerns include not wanting to be in crowds, having concerns about Covid and illness in crowds (both 28%), while 12% believe that staying at home is the responsible thing to do.

Amongst those who have been to live music events before the pandemic, but haven't attended any since, their top concern is about Covid and illness in crowds (30%), followed by not wanting to be in crowds (27%), worrying the artist or event organiser will cancel the event (13%) and not being confident the event will take place or feeling that staying at home is the responsible thing to do (both 12%).

Over half (55%) of UK adult's attitudes towards attending events in general has changed since before the pandemic. The top changed attitudes include going to less events overall (20%), not having as much energy to go out and not thinking about going to live music (both 15%). For over one in ten (13%) travelling to events now feels like a lot of effort.

Of those who attend live music events, three in ten (31%) feel that tickets are too expensive. This is stronger amongst those who have *not been back* to live music events since the pandemic (32%) compared to those who have attended events in the last year (25%). Other barriers to buying tickets for live music events include having less disposable income to spend on tickets (25%), felt most strongly by females aged 55-64 (41%), females aged 25-34 (30%) and males aged 55-64 (29%). This is also felt more strongly amongst those on lower income levels, increasing to 43% amongst those on £5,000 to £9,999 a year and 42% amongst those on £10,000 to £14,999 a year.



Of those who have attended events, they are less likely to feel that everything feels expensive post the pandemic, compared to those who attended events before and have not been since (20% v 24%). All groups are equal when it comes to not buying tickets if there is no guaranteed refund if the show is postponed, 16% for both and an important learning to bear in mind when selling tickets.

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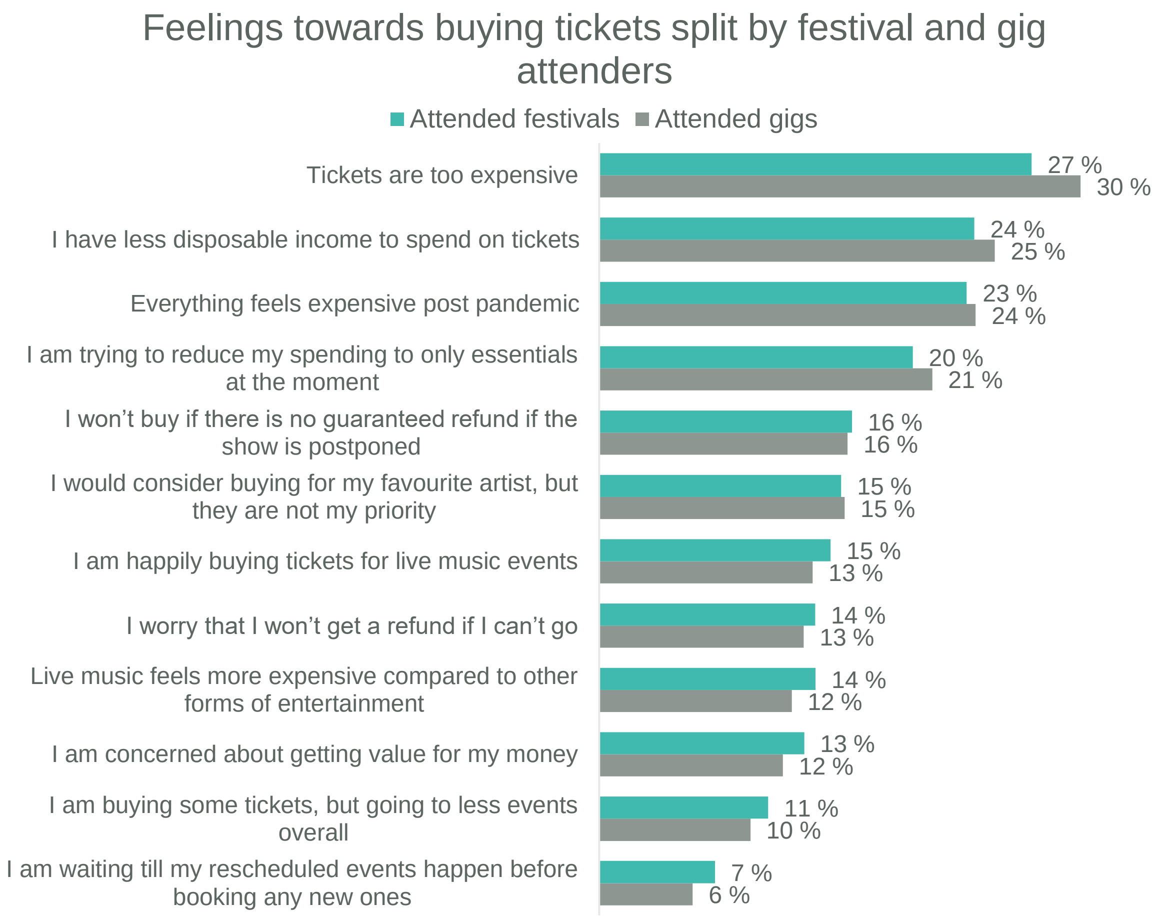
Looking in particular at the differences between those who attend festivals and gigs, there are not large differences in how they feel about buying tickets for the types of events they attend, aside from gig attenders feeling slightly more strongly that tickets are too expensive (30%) versus 27%.



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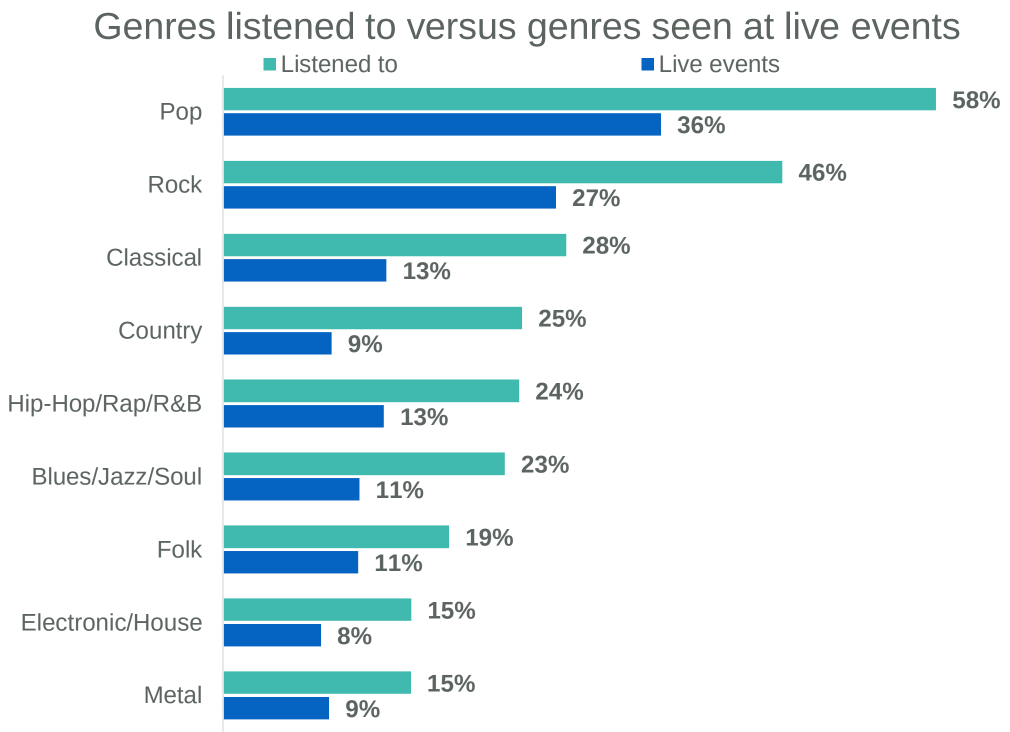
Genres

The most popular genres to *listen to* are pop (58%), rock (46%), classical (28%) and country (25%), and the most popular genres to *attend live events for* are also pop (36%), rock (27%), classical (13%) and Hip-Hop/Rap/RnB (13%).



When it comes to how different genre listeners feel about buying tickets for live events, interestingly, those who listen to Pop and Rock are most likely to feel that tickets are too expensive (34% and 32% respectively). Whilst Jazz and Blues listeners were least likely to feel this way (22%). It is classical listeners that are most likely to be attempting to reduce their spending down to only essentials at the moment (31%), whilst other genre listeners do not feel as strongly about this, with again Jazz and Blues listeners at the lowest end, with 18%. Jazz and Blues listeners are, however, most likely to not buy tickets if there is no guaranteed refund in the case of the event not going ahead (25%).

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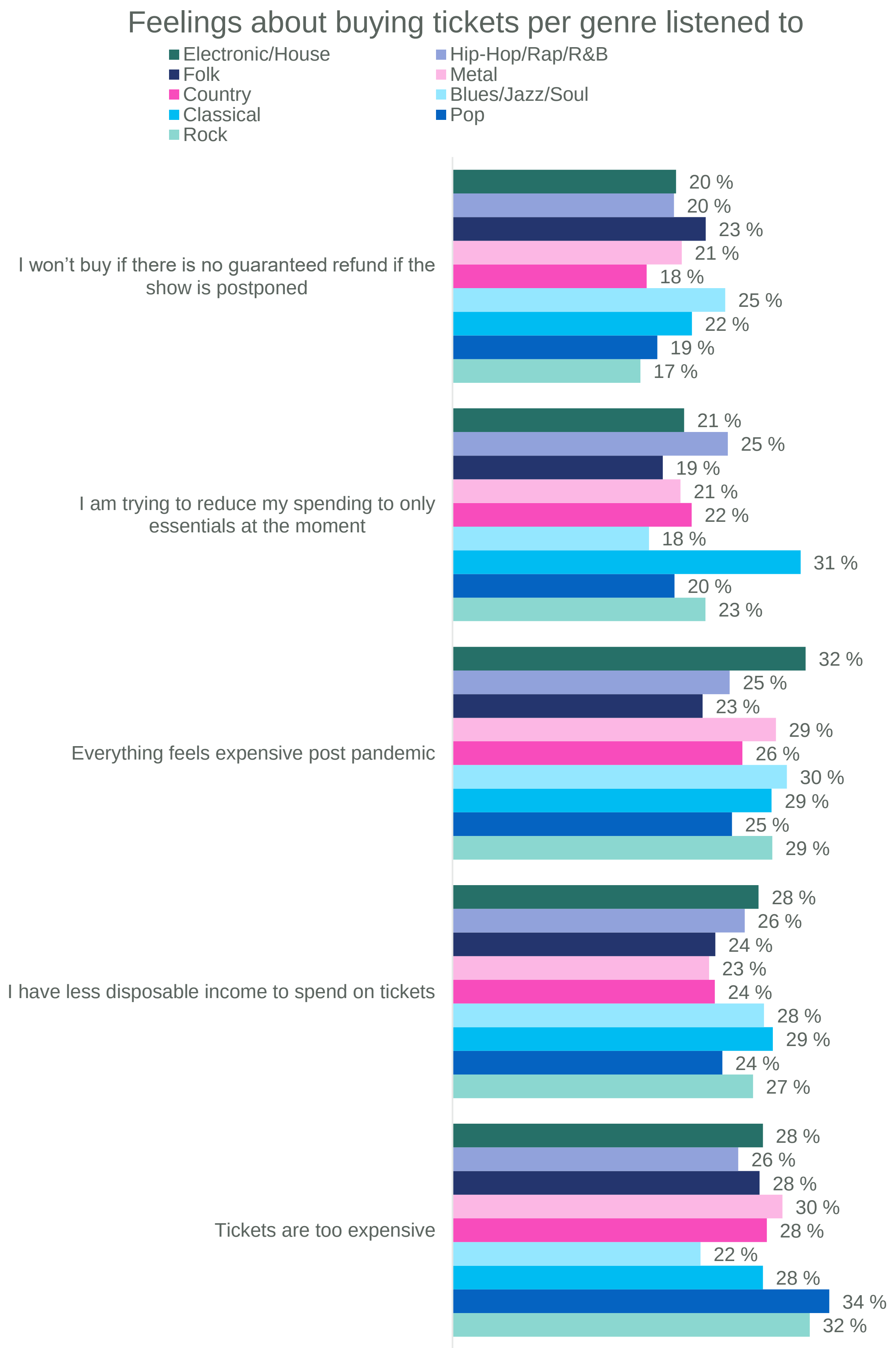

OPINIUM is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on pulse of what people **think**, **feel** and **do**. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

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