Ten Theatres. Ten Years.

Key findings from a marketing benchmarking study of ten venues across a decade:

2013/14 – 2023/24

Background and Methodology

In the Spring of 2024, Nottingham Playhouse approached Data Culture Change to assess how their marketing and sales operations compared to their peers.

The research questions they wanted to answer included:

- Were their marketing salaries competitive?
- Was their team comparatively large or small?
- Did the balance of their spending on traditional and digital channels reflect the market?
- Was the average price paid for a ticket (ATP) high or low?
- What was the return on marketing investment across different elements of their programming and was this typical?
- Were they selling more or less than their peers online?
- How large was the salary bill for ticket staff compared to the revenue generated through counter and phone sales?
- How has this all changed in the last five and ten years?

Data Culture Change found a further nine theatres (all medium- or large-scale presenting or producing houses) from around England and Scotland to take part in a benchmarking exercise.

Participants were required to complete a template that included detailed information from 2023/34 and less granular details from 2018/19 and 2013/14. Data was collated from box office, finance and HR systems.

Each participating organisation received its own report comparing the theatre's data with the mean across the ten theatres and a benchmark of a minimum of three other organisations chosen by the venue.

While the principal motivation for the study was to allow each organisation to benchmark meaningfully with peers, overall trends in the aggregate and mean data across the three study periods are also revealing.

This short study highlights some of the most notable findings from a turbulent ten-year period for British theatre.

Key Finding One: Fewer performances post-pandemic

The ten organisations in this study operate widely varying business models. As well as different artistic policies and different scales, most operate multiple performance spaces. Some of these spaces were not open for all three study periods. No attempts have been made to ‘correct’ data to take into account spaces opening and closing.

The aggregate number of productions in 2023/24 (1,072) was very similar to the total for 2013/14 (1,112). The largest fall was for self-produced productions, down from 72 in 2013/14 to 55 in 2023/24.

Comparing the number of performances ten and five years ago, the totals were very similar: 4,779 in 2013/14 and 4,693 in 2018/19. The total dropped by over 700 performances to 3,987 in 2023/24.

This reduction was not due to a single venue closing for refurbishment: all ten participating organisations reported a reduction in performances compared to 2013/14.

The biggest falls were in self-produced performances (down 37%) and presented run performances (down 23%). One-nighters performances rose by 12%.

Key Finding Two: Falling ticket prices for most venues post-pandemic

After a period of low inflation, prices have been rising sharply in recent years.

We tracked average ticket prices for the three study periods, adjusting them for inflation (CPI).

All theatres that could provide data recorded a real-terms increase in the average price paid per ticket for the period between 2013/14 and 2018/19.

Compared to 2018/19 (£26.52), average ticket prices across the ten organisations fell by £1.58 in 2023/24 (£24.94). While this aggregate fall was substantial, it wasn’t universal: three of the ten organisations recorded prices rising in real terms.

The largest fall in average price paid was for presented runs (down on average £2.82). The average price paid for self-produced work rose by £4.13.

Key Finding Three: Sales channel shift

While the pandemic is widely credited as a catalyst for sales channel shift, there was higher growth in online sales in the five years to 2018/19 (share up 21 percentage points) than there was in the five years to 2023/24 (share up 17 percentage points).

In 2023/24 all ten organisations were generating at least two-thirds of their revenue from online sales, and two organisations had exceeded 80%.

There were marked differences in the proportion of revenue by product type. For most venues ‘One-nighters’ topped the table for the proportion of ticket revenue generated online and all organisations saw the highest proportion of counter and phone sales for their Christmas offering.

Key Finding Four: Digital catching traditional

Participants shared detailed information on their allocation of marketing spend for different product types in 2023/24.

‘Digital’ marketing (including social media advertising, Google/digital advertising, other digital marketing, e-mail marketing and digital content creation) accounted for 37% of show-related marketing spending. This was only just exceeded by ‘Traditional’ activity (press, radio, TV and outdoor advertising) at 40%.

We calculated the return on marketing investment for each of the ten organisations. There was a clear correlation between organisations delivering a high return on investment and those allocating a higher proportion of funds to digital activities. The organisation reporting the highest return on investment was investing 61% of show-related spend on digital marketing.

Two organisations reported particularly high levels of return on investment for their seasonal offering. In both cases the limited marketing investment the venue was making was largely in through ‘Traditional’ channels rather than ‘Digital’.

Key Finding Five: Average marketing wages not keeping track with inflation post-pandemic

Participants shared the salaries of all their marketing and sales staff for the three study periods.

We tracked the highest and lowest salaries for each marketing team, as well as the mean salary across all marketing posts.

While the average salary for the lowest-paid member of the team grew above inflation in the five years between 2018/19 and 2023/24 (up £3,689 in 2024 prices), real terms pay fell for the highest-paid member of the team (down £1,721) and the team as a whole (down £836).

Our project scope did not extend beyond the marketing department's wages. We cannot tell whether the failure to keep pace with inflation is also true for other departments in the ten venues.

Key Finding Six: Marketing teams shrinking post-pandemic

Most participants were not able to provide information on staffing in 2013/14.

All participants did provide data for 2018/19. The size of the marketing and communications teams ranged from 4.0 to 9.8 full-time equivalent posts (FTE). The mean team size was 6.6 FTE.

In 2023/24 the mean size dropped by 0.8 FTE to 5.8 FTE. Two of the ten participants reported an increase in team size, one reported no change and seven reported a reduction in team size.

Conclusions

The findings of this study, conducted over a decade and across ten leading theatres, reveal significant trends in the evolution of theatre marketing, ticket sales, and operational structures. The data paints a picture of an industry that, while resilient, is still adjusting to the long-term impacts of the pandemic.

A reduction in performances, particularly self-produced and presented runs, seems likely to have affected programming diversity. This decline, paired with falling average ticket prices, especially for presented works, reflects shifting audience dynamics. However, there are encouraging signs of adaptation, including the rise of digital marketing channels and non-ticket revenue generation (including packages and donations). Digital platforms have not only on average almost caught up with traditional methods but are delivering stronger returns on investment for theatres that embrace them, marking a key shift in marketing strategies.

Another notable trend is the contraction of marketing teams and stagnant wage growth in real terms, reflecting financial pressures post-pandemic. Despite this, digital investment has helped boost sales efficiency, particularly online sales, which have become the dominant revenue source for all venues.

In summary, while British theatres have demonstrated agility in responding to economic and societal shifts, they face ongoing challenges in balancing operational costs, ticket sales, and evolving audience behaviours. As the industry moves forward, a continued focus on digital innovation, audience engagement, and sustainable financial models will be crucial for theatres to thrive in an unpredictable cultural landscape.

Future Benchmarking

Data Culture Change would like to repeat and extend this project in 2025.

If you would like to know more about how to participate, please email david@dataculturechange.com.

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