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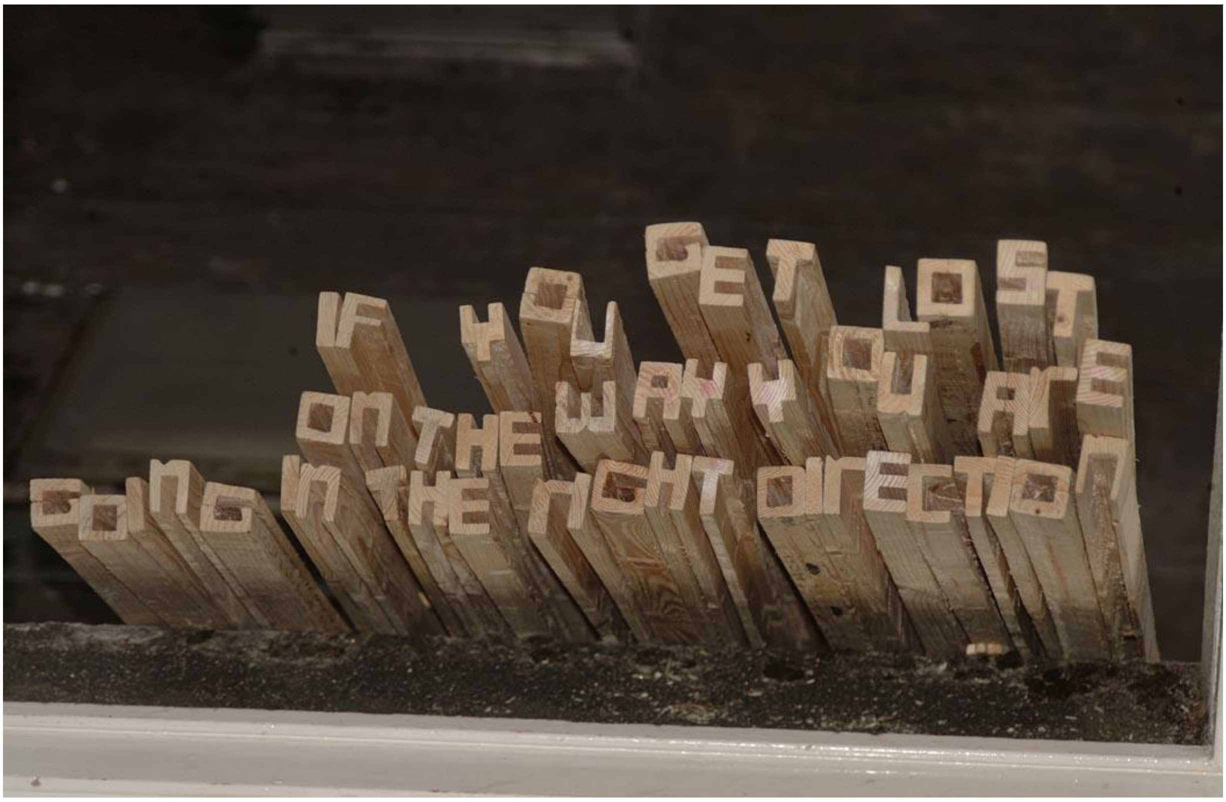

BENCHMARKING TICKETING & DIGITAL BEHAVIOUR OF LITERARY FESTIVALS IN IRELAND 2014

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DECEMBER 2014

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[1ã] *Cover image: installation at Éigse Carlow 2006 by Vivienne Griffin*

LITERARY FESTIVALS IN IRELAND

Literature is an integral part of people’s lives in Ireland: books, stories, language and reading are essential to our culture and society. Through direct support for literary festivals and through partnerships with libraries and others, the Arts Council works to create opportunities for people across the country to engage with high quality literature from Ireland and around the world.

In 2014, the Arts Council supported a variety of distinct literary festivals and events, which ranged from large-scale international festivals encompassing every genre of writing to weekend-long events concentrating on a particular genre. The Arts Council supported 14 literary festivals and events in 2003 and this has risen to over 30 in 2014. The Arts Council's support to literary festivals and events, in the main, is provided in the context of its overall objective to enable more people to experience the arts in more places.

Notwithstanding the role of the festival in the individual writer's creative development, the primary purpose of Arts Council support for literary festivals is to reach and develop audiences for literature. In order to deliver on this ambition, more information is required about who these audiences are, why they attend literary events and how might we reach more people. We are very pleased to present the second benchmarking report for literary festivals, which will go in some way to help us better understand our audiences.

Sarah **Bannan**

Head of Literature

Arts Council of Ireland

INTRODUCTION

Through this project, Arts Audiences and the Arts Council of Ireland are providing support and guidance in respect of ticketing and audience benchmarking for six literary festivals in Ireland. With fit-for-purpose and audience-friendly ticketing vital to the health and growth of audiences in Ireland, this report looks to examine the current status of ticketing infrastructure being used by the participating literary festivals and examine how festivals currently collect and utilise information on their audiences, with a special focus on sales and digital channels.

Now in its second year, we once again carried out a benchmarking of the participating literary festivals with regard to how their audiences interacted with them, looking at industry-standard audience benchmarks as well as key benchmarks for literary festivals as a “genre”, with a view to providing individual and comparative insight for each festival. The overall aim is to provide the participating festivals with knowledge to guide their sales/marketing activity going forward and to arm them to face challenges ahead, as well as providing Arts Audiences and the Arts Council with sectoral insights that might have broader use and resonance.

Continuing the project beyond its pilot phase also gives us the opportunity to begin to track the impact of changes in festival behaviour, particularly regarding any recommendations for participants that came out of the pilot year, and to track trends in audience behaviours as they emerge.

We hope that as the project continues, the data collected over multiple years will provide ever more useful insights for participating festivals to assist them in bringing their wonderful events to increased and more engaged audiences.

Annette **Nugent**

Sarah **Murphy**

EXECUTIVE SUMMARY / KEY FINDINGS

This is the second literary festivals benchmarking project, and analyses over 21,587 tickets for 466 events in six festivals, with a combined total attendance of 33,385.

Some key findings (average figures)…

Ticket sales accounted for 24.3% of participant's total revenue (22.25% in 2013).

60.2% of all events run were saleable: i.e., revenue-generating (66.7% in 2013).

71.5% of festival capacity was saleable (75% in 2013).

Attendance at saleable events (% of available tickets sold) was 55.7% of capacity (52.3% in 2013).

The median ticket price (excl workshops) was €11.17.

Median workshop ticket price was €90.80.

Saleable ticket yield (the average amount actually paid for tickets) was €14.80 (€13.15 in 2013).

28.2% of tickets were purchased online, 15.6% by phone, 33.4% in a physical box office and 20.8% on the door, with 1.9% undefined.

12.9% of tickets were purchased more than a month in advance, 20.3% 8-29 days in advance, 19.9% 1-7 days in advance, and 33% on the day, with 13.9% undefined.

Of known booker addresses, 46% of audiences were local, 41% were Irish (non-local), and 13% were international.

Audiences attended 2.39 events in each festival (1.6 in 2013).

27.4% of website visits were on mobile/tablet devices.

12.4% of website traffic was referred from social media sites and 44% from Organic Search.

Four of the six participants used fit-for-purpose ticketing systems that have the potential to accurately report on audience behaviour, but were used to differing degrees of efficiency.

The average data capture rate of ticket buyer names (at 73.1%), and of address (at 70.1%), are both lower than the 75% required to get a totally accurate image of audience behaviour, and clearly indicates that literary festivals must improve their data collection if they are to generate more accurate audience insights. Having said that, there were improvements in data collection in year 2.

While the promise of future years of benchmarking offers more concrete causation, there are correlations between those festivals with the highest percentage of data capture (C & D) and the highest percentage investment in marketing/box office (C) with the highest % of box office revenue earned (C & D) and the highest % of saleable capacity filled (D). More data, more revenue.

BENCHMARKING IN 2014

About Benchmarks

Benchmarking – comparing your data with metrics from equivalent organisations within your industry – has two things in particular to offer. Firstly it helps us judge how good we are now, and secondly it helps us work out what improvements might be possible. The value is in registering where other organisations are doing better, looking at how they do it and learning from them.

As defined by Arts Development UK (ADUK), benchmarking is *a method for organisations to compare their processes, practices and performance in order to learn and improve their work*. They need to be comparable, broad, and easily calculated, because they need to be repeated regularly to be meaningful for participating organisations and the wider industry.

Making data publicly available in this way means that a wider variety of culture professionals will start asking questions of it and discussing the results they obtain. In turn, this should result in a growth in the overall knowledge base in a particular sector and may in turn lead to improvements in the types and quality of data collected.

About This Project

The aim of the benchmarking process itself is to look at the behaviour – online, offline, sales and marketing – of the six selected festivals. To be scalable as a pilot within the literary festivals sector, it was essential that the pilot sample include a cross section of different types and sizes of organisations, which it did.

This report summarises analysis of box office data from six literary festivals that took place in 2014. The participating organisations were (in alphabetical order) Cork International Short Story Festival, Cúirt Festival of Literature, Dublin Writers' Festival, IMRAM Féile Litríochta Gaeilge, Listowel Writers' Week and West Cork Literary Festival.

The participants in this pilot were once again most cooperative, generously gathering, providing and sharing information as well as making valid suggestions to ease the data collection process in year two. In 2013, we made some specific recommendations for how each festival might improve current behaviours and systems around audience interaction to becoming more "benchmarkable" and measurable – with a view to refining marketing activity and, ultimately, optimising sales. The 2014 benchmarking is an opportunity to see the impact of implemented recommendations on each festival and on the group as a whole. We have, for example, noticed a significant collective awareness of the importance of understanding their web traffic and digital marketing activity, but there is still a need to improve their ability to analyse the digital insights available to them in Google Analytics.

Limitations

As noted in the pilot year, the box office set-up (or lack thereof) of some participants meant that once again they were not capable of fully participating in benchmarking this year. For three of the six festivals, hard data on audience attendance and behaviours continues to be incomplete. While the participants as a whole improved their data collection between 2013 and 2014, this made it difficult in certain research areas to extract entirely robust insights about how Irish literary festivals and their audiences behave.

There were large variances is data capture rates (see data quality section below); relating once more to how the festivals used their particular systems in 2014. Four of the festivals used fit-for-purpose box office systems capable - with the correct set up - of capturing all sales data, but were used to differing degrees of efficiency.

Of those four participants, each had a unique set of circumstances that challenged the robust and accurate analysis of their audiences that this report set up to achieve:

- one shared their system with two other festivals;
- one used a local venue's box office that retained the festival's sales/customer data;
- one held some events at large venues that sold their own tickets to that festival's events;
- one did not enter door sales into the box office system, which meant their cash purchasers were not accurately recorded.

Of the two participants without box office systems:

- one captured limited information on some attenders, mainly advance workshop bookers, but had no facility to collect information on the rest of its audience;
- one did outsource some online sales, but did not experience a high volume of sales through this channel and could not provide benchmarkable data.

One limitation expressed in 2013 was vastly improved in 2014: an adoption of agreed definitions for much-used terms like "workshops" and "readings" to be applied consistently by all participants. The adoption of the lexicon agreed in early 2014 should improve the quality of insights generated in the programme and audience profile analysis in particular.

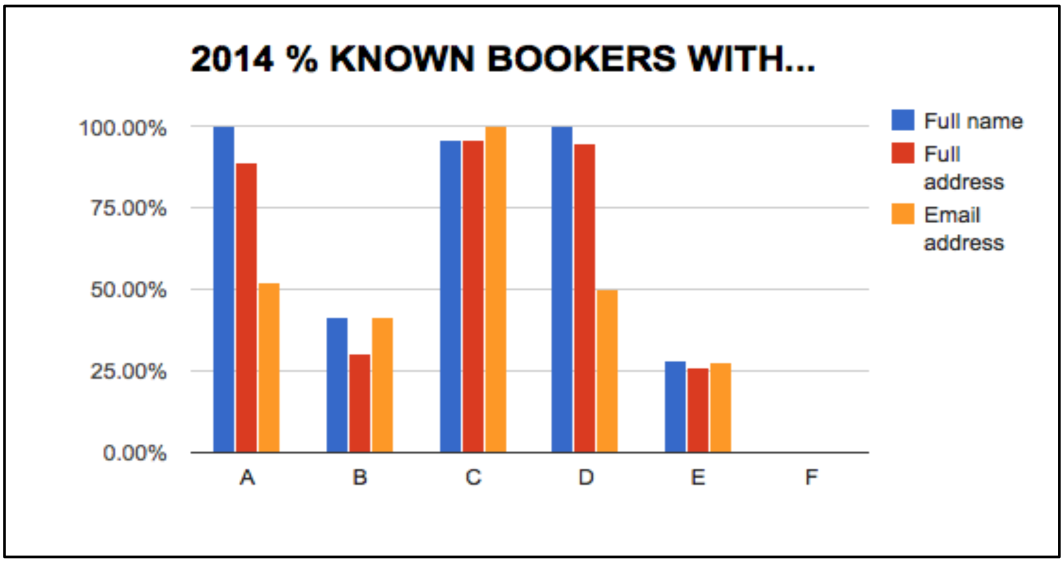
Take home point: As noted in the pilot project report, improving data capture rates considerably is very much possible for all the participating festivals, and for most would just involve some simple but vital shifts in the procedures followed by the festivals, especially by their marketing and box office staff.

Data Quality

Information on the behaviour of festival audiences depends mainly on whether box office staff collect names and addresses of customers and link transactions with those customers. Collection of this information needs to be done on at least 75% of transactions to get a viable image of audience behaviour. In the arts generally, data capture rates of 85%+ are considered good and 90%+ excellent. To give some Irish context, organisations participating in the Theatre Forum Benchmarking[2] collected data for 91% of their ticket buyers, on average, in 2013.

In this, the second year reporting on their data in this way, the participating festivals collected, on average, names of 73.1% of bookers (73.3% in 2013), names and postal addresses of 70.1% of bookers (62.8% in 2013) and email addresses for 64.9% of their bookers (42.6% in 2013). This is an improvement on data collection in 2013, and includes data collection information from five of the participants. However, one of those has no formal ticketing system.

If we compare 2014 data collection of the four festivals with formal ticketing systems, they collected, on average, names of 84.3% of bookers, names and addresses of 77.5% of bookers and email addresses of 60.9% of bookers, which is a significant improvement on 2013. Indeed data collection by three participants was excellent at over 90%.



	MIN	MAX	AVE	TOTAL	#	A	B	C	D	E	F
Full name	28.42%	100.00%	84.30%		5	100.00%	41.49%	95.70%	100.00%	28.42%	
Full address	26.32%	95.70%	77.50%		5	89.14%	30.14%	95.70%	95.04%	26.32%	
Email address	27.89%	99.96%	60.92%		5	52.19%	41.49%	99.96%	50.05%	27.89%	

	2013 Average	2014 Average	% Change
Full name	73.32%	84.30%	14.98%
Full address	62.84%	77.50%	23.33%
Email address	42.55%	60.92%	43.19%

Take home point: There is still scope for much greater accuracy of information in this report if the festivals that did not collect data on door sales were able to incorporate door bookings into their data collection procedures going forward.

[2]Source: *Audiences for the Performing Arts in Ireland 2013* by Heather Maitland

FESTIVAL OVERVIEW

Duration and Frequency

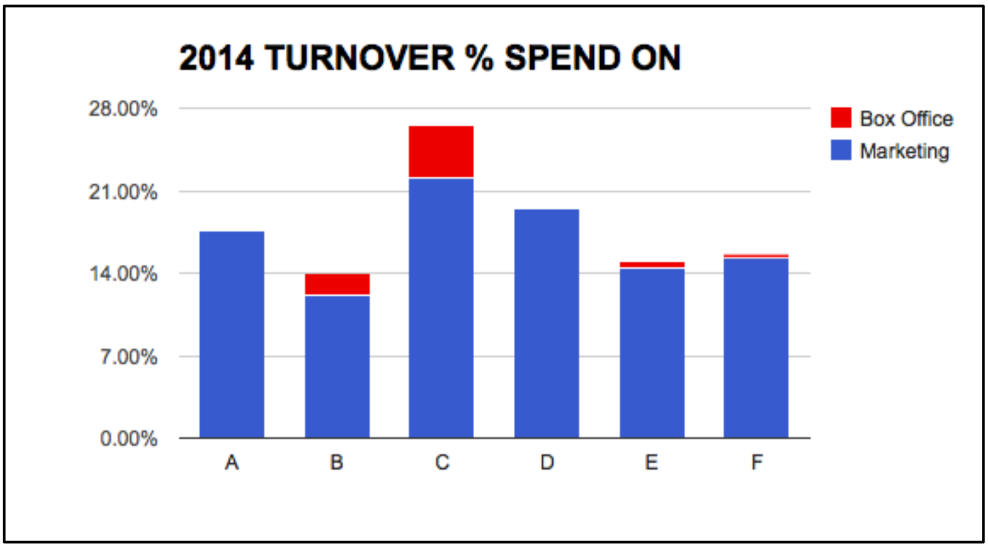
All participating festivals were annual, taking place once a year. **Average duration of participating festivals was 5.8 days (6.5 days in 2013)** ranging from the shortest at 4 days to the longest at 9 days. All festivals bar one were shorter or the same length this year (10.3% overall reduction).

Spend on Marketing/Box Office

Average total festival spend was slightly up at €156,142 (€154,516 in 2013), but the range was incredibly broad, from €43,045 to over €259,000.

While not useful to compare such diverse budgets, we can compare the percentage investment made by participants in marketing and box office. **2014 Marketing spend ranged from 12% to 22% of overall spend, with an average of 16.8%** (17.4% in 2013). British research indicates that, on average, 8-9% of budgets are spent on marketing, with small festivals (turnover less than £100,000) averaging 13-14% on marketing.[3] However, Edinburgh International Festival spends 25% of its budget on marketing, so participants appear to be well within industry norms.

Investment in box office was, as would be expected, significantly lower and in some cases non-existent. The average investment on box office was 1.2% of overall spend, ranging from 0% to 4.5%. Not surprisingly, the festival with the highest % of turnover spent on box office was the participant with the most successful data capture record.



	MIN	MAX	AVE	#		A	B	C	D	E	F
% of total spend on marketing	12.06%	22.09%	16.82%	6	Marketing	17.56%	12.06%	22.09%	19.43%	14.40%	15.35%
% of total spend on box office	0.00%	4.46%	1.20%	6	Box Office	0.00%	1.92%	4.46%	0.00%	0.55%	0.27%

	2013 Average	2014 Average	% Change
% of total spend on marketing	17.39%	16.82%	-3.29%
% of total spend on box office	1.20%	1.20%	0.00%

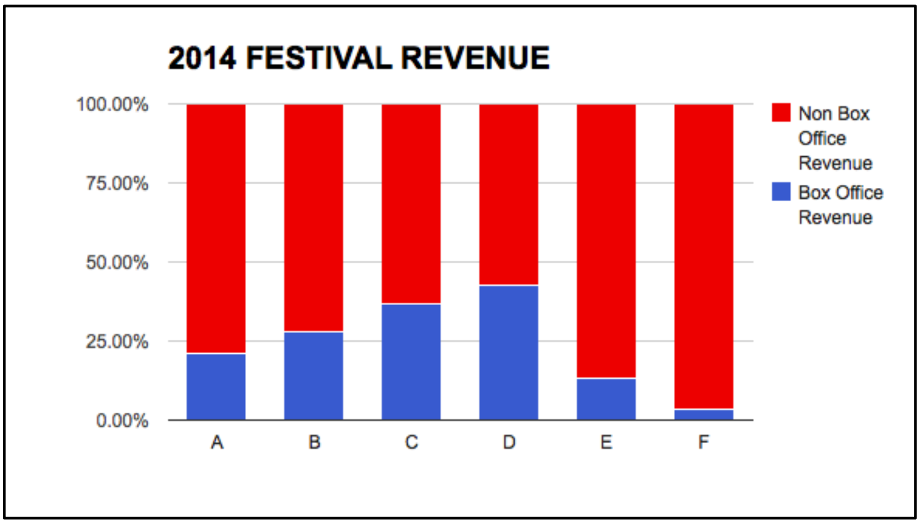
[3]My Cake's *Culture Benchmarks 2011* & BAFA *"Festivals Mean Business 3 - A survey of arts festivals in the UK"*, 2008

Revenue from Box Office

On the revenue side, income from ticket sales is of varying importance to the participating festivals, which may go some way to explaining the variety of investment in marketing / box office. **Box office accounted, on average, for 24.3% of the festivals' total revenue (22.25% in 2013)**, ranging from 3.6% of one participant's income up to 42.8% for another participant.

In general, the percentage of revenue that box office income represents remained stable for participants: for two festivals it is more than 30% of income, for two it is between 20% and 30% of income, and for two it is under 15% of income.

The two festivals with the smallest percentage of revenue from box office were also the two festivals without formal ticketing systems. This may be partially explained by programming / accessibility objectives as well as the level of free unticketed events programed by each, but significant comp ticket figures may also impact on their box office revenue potential.



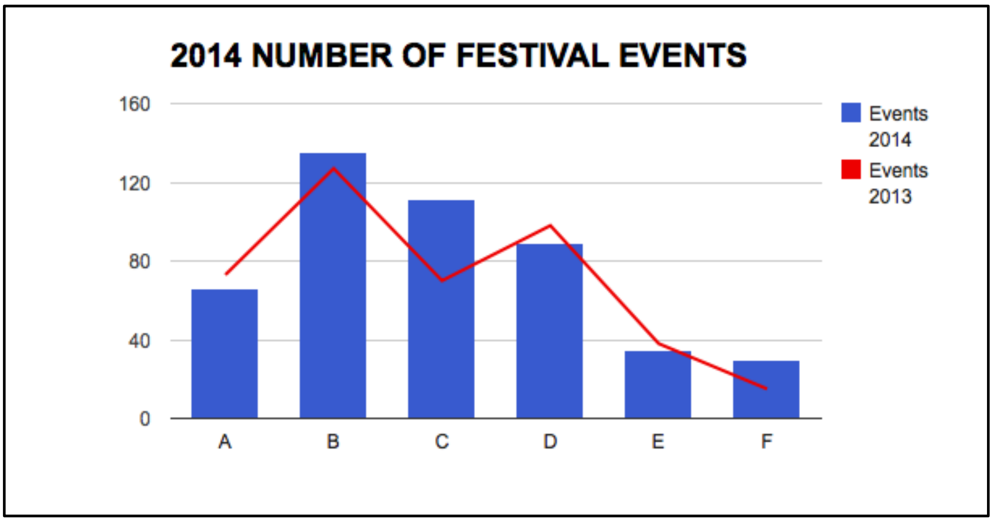
In absolute terms, the combined box office income of the six participants reduced by 7% from €233,410 in 2013 to €217,499 in 2014. Only one participant festival saw an increase in their box office revenue between 2013 and 2014. For all others, box office revenue reduced between 2013 and 2014. There are too many external variables to speculate as to why this may be the case.

	MIN	MAX	AVE	#	A	B	C	D	E	F
Box Office Revenue	4285	73700	36,249.87	6	32,296	73,700	56,527	44,914	5,777	4,285
Non Box Office Revenue	38500	189771	102,921.00	6	120,115	189,771	96,550	60,090	38,500	112,500

PROGRAMME

Number of Events

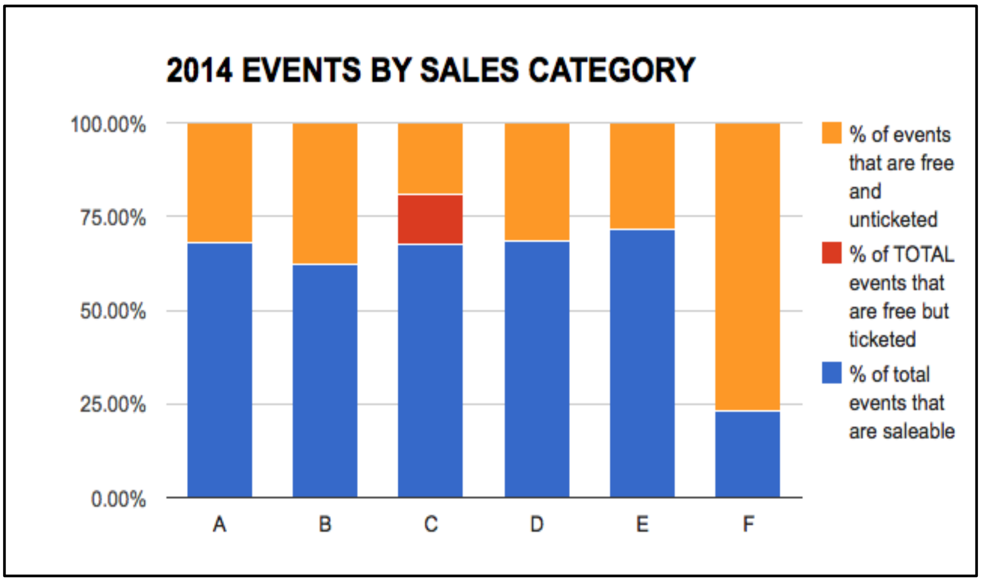
On average, participants ran 77 events each in 2014 (70 in 2013), a 10.7% increase. The year-on-year average increase can mainly be explained by one festival increasing the number of events it presented by 40%. There was, again, a very wide variance, from 30 events by one festival all the way to 135 events by another.



	MIN	MAX	AVE	TOTAL	#	A	B	C	D	E	F
TOTAL EVENTS	30	135	77.67	466	6	66	135	111	89	35	30

Saleable Events

On average, 60.2% of all events run were saleable: i.e., revenue-generating, down 9.8% from 66.7% in 2013. Saleable events ranged from 23% to 71% of participants' total events.



Free Events

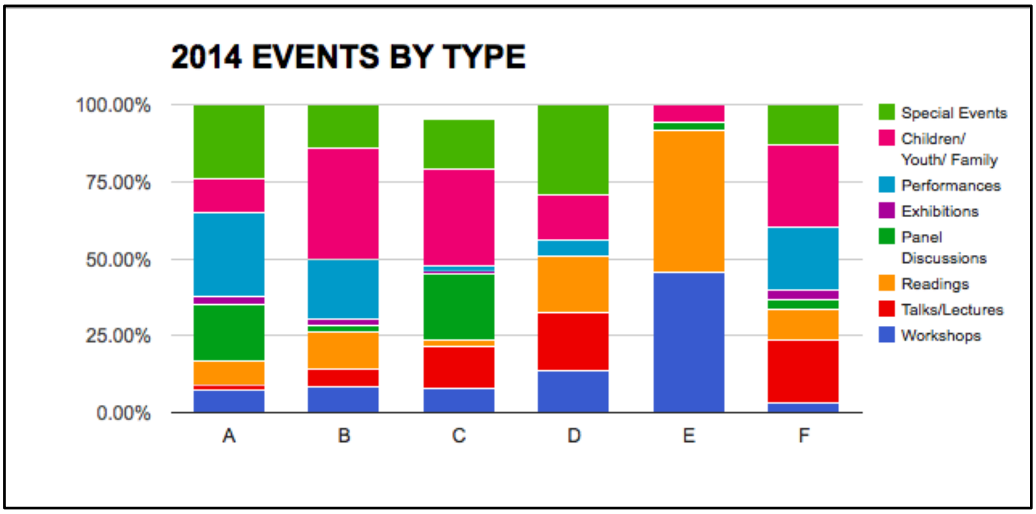
Of the free events run by festivals, the overall tendency was for them to be unticketed. **On average, 37.5% of all events were free and unticketed, a 38% increase on last year's 27.1% free unticketed events.** Just 2.25% of events were free and ticketed, a 63% reduction on last year's 6.1%. Indeed only two of the six participants ticketed any free events in their programme.

	MIN	MAX	AVE	#	A	B	C	D	E	F
% events are saleable	23.33%	71.43%	60.21%	6	*68.18%*	*62.22%*	*67.57%*	*68.54%*	*71.43%*	*23.33%*
% events free but ticketed	0.00%	13.51%	2.25%	6	*0.00%*	*0.00%*	*13.51%*	*0.00%*	*0.00%*	*0.00%*
% events free and unticketed	18.92%	76.67%	37.54%	6	*31.82%*	*37.78%*	*18.92%*	*31.46%*	*28.57%*	*76.67%*

Take home point: Even if everyone's data capture rate was 100% on box office transactions, there was no way to gather any information on attenders at free unticketed events - over one third of all festival events (on average) - which is a loss of knowledge about a significant part of the festivals' audiences.

Events by Type

In 2014, the consultants and participants agreed on eight "types" of events that should accommodate the total range of programmes in each festival: **workshops, talks/lectures, readings, panel discussions, exhibitions, performances, children/youth/family events and special events.**



	MIN	MAX	AVE	#	A	B	C	D	E	F
Workshops	3.33%	45.71%	14.39%	6	7.58%	8.15%	8.11%	13.48%	45.71%	3.33%
Talks/Lectures	0.00%	20.00%	10.01%	6	1.52%	5.93%	13.51%	19.10%	0.00%	20.00%
Readings	1.80%	45.71%	15.82%	6	7.58%	11.85%	1.80%	17.98%	45.71%	10.00%
Panel Discussions	0.00%	21.62%	8.04%	6	18.18%	2.22%	21.62%	0.00%	2.86%	3.33%
Exhibitions	0.00%	3.33%	1.58%	6	3.03%	2.22%	0.90%	0.00%	0.00%	3.33%
Performances	0.00%	27.27%	12.33%	6	27.27%	19.26%	1.80%	5.62%	0.00%	20.00%
Children/ Youth/ Family	5.71%	36.30%	20.90%	6	10.61%	36.30%	31.53%	14.61%	5.71%	26.67%
Special Events	0.00%	29.21%	16.18%	6	24.24%	14.07%	16.22%	29.21%	0.00%	13.33%

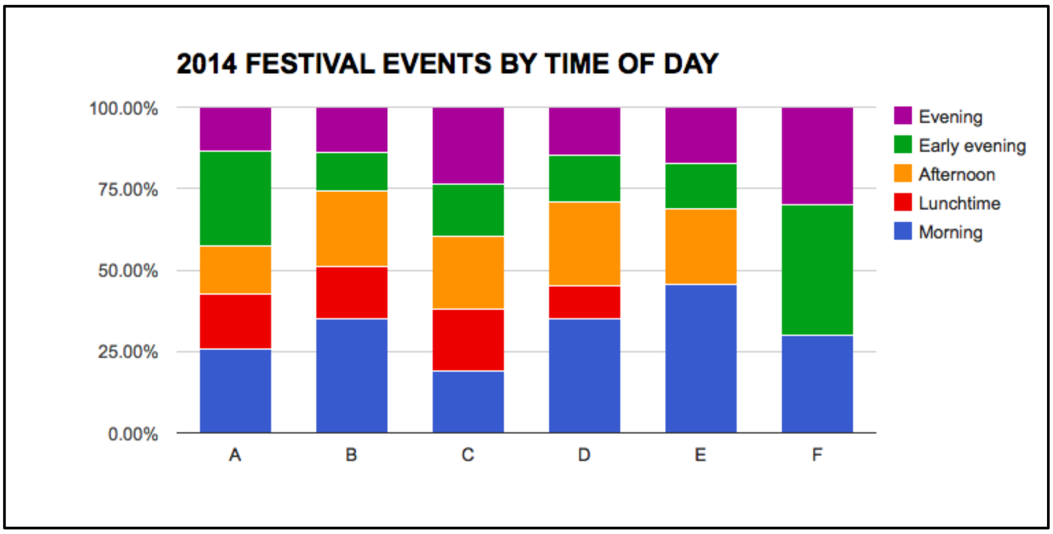
	2013 Average	2014 Average	% Change
Workshops	16.35%	14.39%	-11.97%
Talks/Lectures	13.25%	10.01%	-24.43%
Readings	19.33%	15.82%	-18.15%
Panel Discussions	6.85%	8.04%	17.28%
Exhibitions	1.96%	1.58%	-19.39%
Performances	19.73%	12.33%	-37.54%
Children/ Youth/ Family	15.15%	20.90%	37.96%
Special Events	7.38%	16.18%	119.36%

It is clear that the range of events run by participants is very broad, with workshops, talks/panel discussions and readings prevalent among all participants. As a percentage of their programme, panel discussions (up 17%), children/youth/family events (up 38%) and special events (up 119%) increased in 2014. This correlates with the significant percentage increase in free, unticketed events mentioned above, many of which we would speculate are family-oriented events. Children/Youth/Family events featured in the programme of four participants, and seemed particularly central to festivals B and C.

Events by Time of Day

As in 2013, **five of the participants ran events throughout the day, from mornings right through to post 8pm.** One festival held no lunchtime events. One participant only ran morning and evening events: this was also the festival with the smallest number of events overall.

Mornings were once again the most programmed timeslot, and there was a 24% increase in the average percentage of events taking place at this time. Afternoon was the second most programme timeslot and lunchtime saw the least number of events. While it seems surprising that the evening slots were not the most programmed slots, it should be noted that if you combined the two evening times, that would be the most programmed time of day.



	MIN	MAX	AVE	#	A	B	C	D	E	F
Morning	18.92%	45.71%	31.67%	6	25.76%	34.81%	18.92%	34.83%	45.71%	30.00%
Lunchtime	0.00%	18.92%	10.33%	6	16.67%	16.30%	18.92%	10.11%	0.00%	0.00%
Afternoon	0.00%	25.84%	18.22%	6	15.15%	22.96%	22.52%	25.84%	22.86%	0.00%
Early evening	11.85%	40.00%	20.96%	6	28.79%	11.85%	16.22%	14.61%	14.29%	40.00%
Evening	13.64%	30.00%	18.81%	6	13.64%	14.07%	23.42%	14.61%	17.14%	30.00%

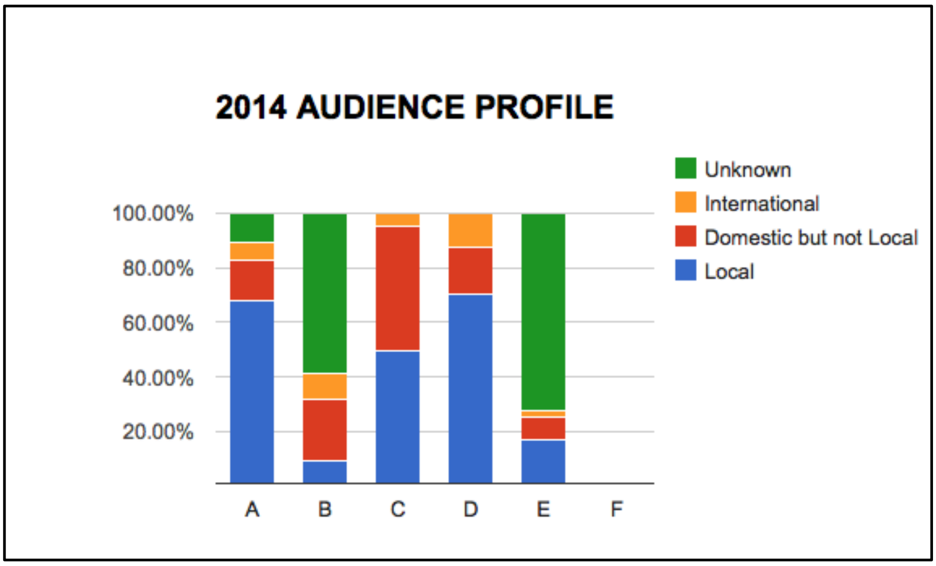
	2013 Average	2014 Average	% Change
Morning	25.57%	31.67%	23.89%
Lunchtime	10.34%	10.33%	-0.03%
Afternoon	19.20%	18.22%	-5.11%
Early evening	20.49%	20.96%	2.27%
Evening	24.40%	18.81%	-22.90%

AUDIENCE

Profile

On average, 43% of festival ticket bookers were local (i.e., from the county in which the event takes place), 22% were domestic visitors (Irish but not local), and 7% were international visitors. The origins of 28% of bookers were not known. If we look just at those bookers whose address was known, then 46% were local, 41% were domestic visitors and 13% were international.

However, there is substantial variance among the participants, with attendance by locals varying from 9% to 70%. It should be noted that due to low data capture rates by some participants this year, we would expect this profile to change significantly in the future, assuming more complete customer address information was collected by all participants. It is not possible to draw conclusions about audience profile changes between 2013 and 2014 as the changes appear to be due to changes in data capture success rather than any obvious changes in audience demographic.

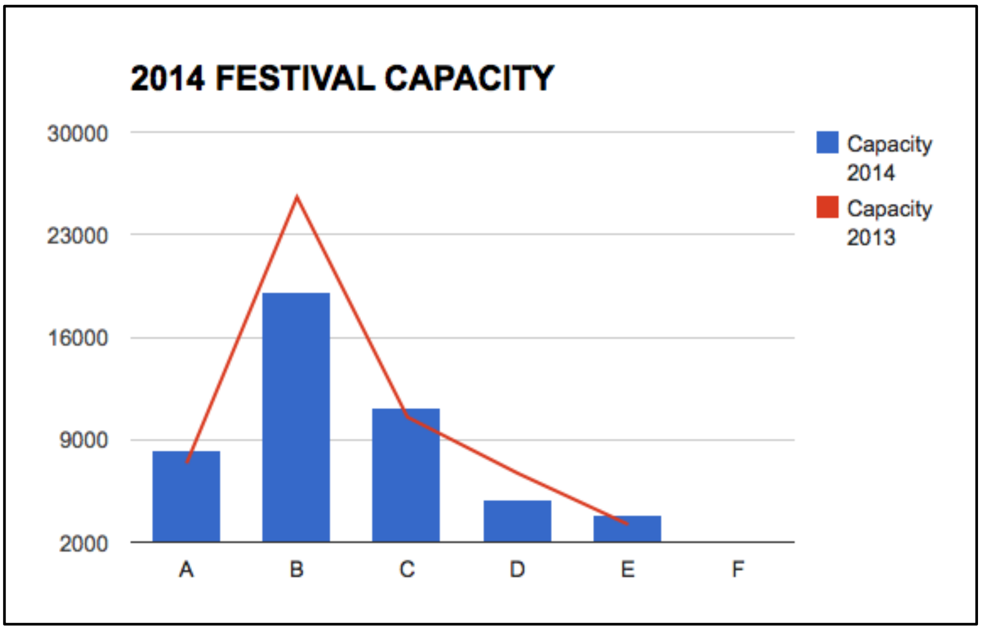


	2013 Average	2014 Average	% Change
Local	52.61%	42.72%	-18.79%
Domestic but not Local	39.29%	21.84%	-44.40%
International	8.11%	7.03%	-13.24%
Unknown		28.40%	

CAPACITY

Of the five participants who were able to supply data about capacity, there was, on average, total festival capacity of 9,460 "spaces", down 11% from 2013's 10,678 "spaces". Again, the variance among participants was wide, ranging from capacities of 3,810 to 19,130. The combined capacity of the five festivals dropped from 53,392 spaces in 2013 to 47,302 spaces in 2014.

	2013 Totals	2014 Totals	% Change	2013 Average	2014 Average	% Change
Total Capacity	53,197	47,392	-10.91%	10,639.4	9,478.4	-10.91%

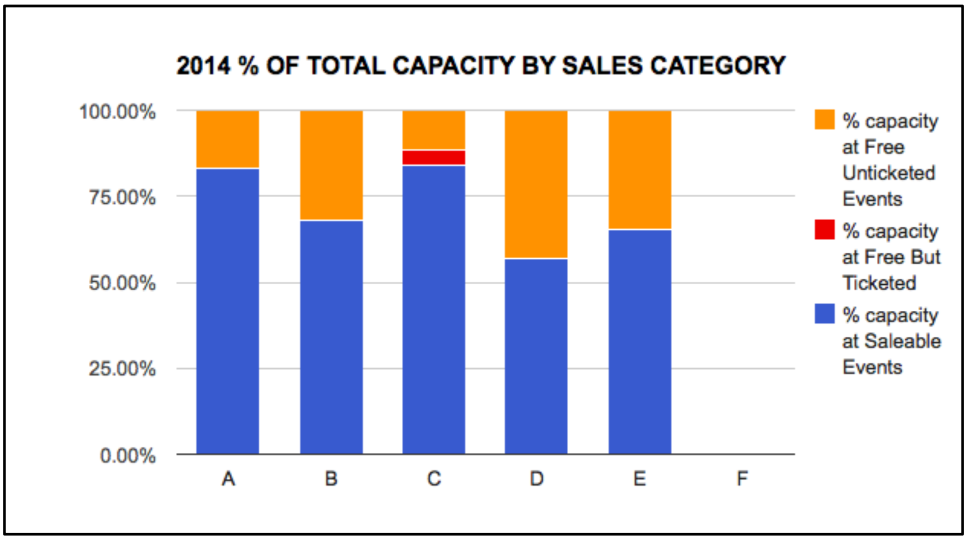


	2013 Totals	2014 Totals	% Change	2013 Average	2014 Average	% Change
Saleable Events	39,750	34,661	-12.80%	7,950.0	6,932.2	-12.80%
Free But Ticketed	2,903	508	-82.50%	580.6	101.6	-82.50%
Free Unticketed Events	10,544	12,223	15.92%	2,108.8	2,444.6	15.92%

Saleable vs. Free Capacity

An average of 68.7% of the festival capacity was saleable (76% in 2013) – i.e., potentially revenue-generating. Indeed, 84% of one participant's total capacity was saleable and even the lowest response had 57% of its capacity for sale. However, saleable capacity reduced in absolute terms by 12% between 2013 and 2014 and this is likely to have had an impact on revenue potential.

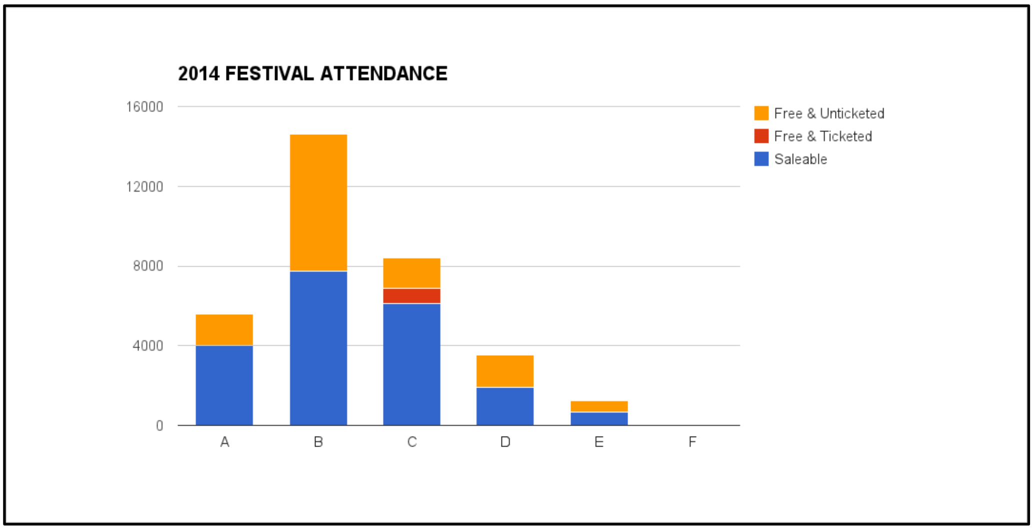
31.3% (24% in 2013), on average, of the festivals' total number of "spaces" were for free events. Within the free events, there was a substantial shift towards holding free-unticketed events (average capacity increase of 16%) rather than free-ticketed events.



ATTENDANCE

Average overall attendance at participating festivals in 2014 was 6,677 (5,657 in 2013). Again, there was huge variance among the festivals, with reported attendance ranging from 1,236 to 14,621. We believe the average attendance increase can be almost entirely explained by the increase in attendance at free unticketed events, which is invariably estimated and inaccurate.

In absolute terms, total combined attendance at the festivals' saleable events fell from 22,683 to 20,458, and free-ticketed attendance collapsed from 1,898 to 731.



	MIN	MAX	AVE	total	#	A	B	C	D	E	F
Final	1,236	14,621	6,677	33385	5	5582	14621	8403	3543	1236	

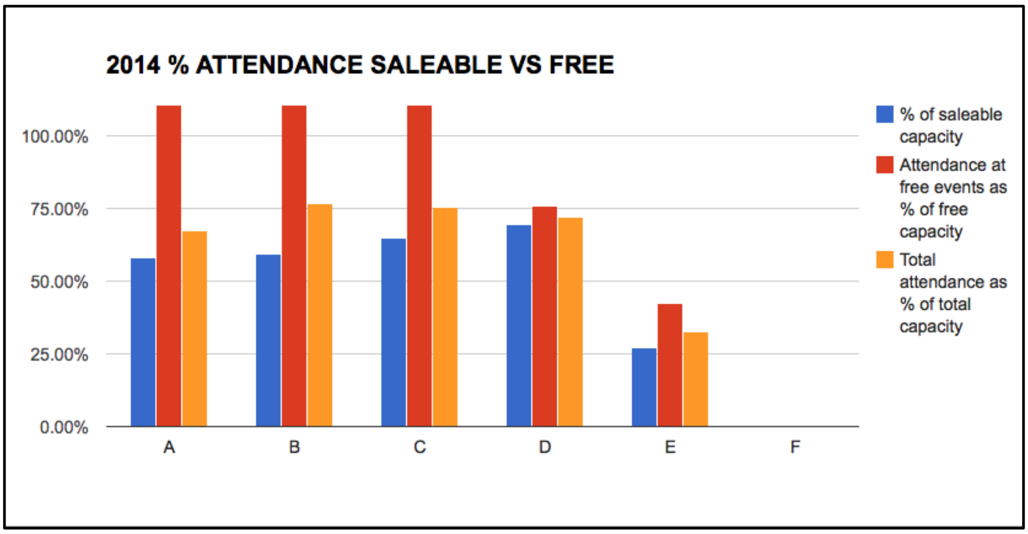
As some participants operate in "niche" genres within literature, where, we assume, a significant reason for the festival is about raising genre profile, it is not appropriate to compare attendance figures per se. However, it is possible to benchmark audience attendance as a percentage of festival capacity, particularly the percentage of available tickets sold.

Attendance as a Percentage of Capacity

On average, total attendance was 64.7% (58.6% in 2013) of total festival capacity, incl saleable and free events. While a 10% increase in attendance sounds positive, we speculate that much of this can be explained by the estimated attendance at free unticketed events, which averaged 94% of capacity.

On average, percentage attendance at saleable events – i.e. the percentage of available tickets sold/issued - is a more interesting figure regarding audiences. **In 2014 this reached 55.7%** (52.3% in 2013). While this 6% increase seems positive, we must remember that overall there were 12% less tickets on sale in 2014. To put this into an Irish context, organisations participating in the Theatre Forum Benchmarking issued 56% of their saleable tickets in 2013, and participating festivals issued 60% in 2013, so it would appear percentage capacity attendance achieved by Literary Festivals is consistent with the wider performing arts sector.[4]

[4]Source: *Audiences for the Performing Arts in Ireland 2013* by Heather Maitland



	MIN	MAX	AVE	total	#		A	B	C	D	E	F
% of saleable capacity	27.11%	69.22%	55.69%	278.47%	5	% of saleable capacity	58.04%	59.20%	64.89%	69.22%	27.11%	
Attendance at free events as % of free capacity	42.50%	127.60%	94.14%	470.70%	5	Attendance at free events as % of free capacity	111.48%	113.40%	127.60%	75.72%	42.50%	
Total attendance as % of total capacity	32.44%	76.43%	64.71%	323.55%	5	2014	67.17%	76.43%	75.48%	72.03%	32.44%	

	2013 Average	2014 Average	% Change
% of saleable capacity	52.33%	55.69%	6.43%
Attendance at free events as % of free capacity	80.05%	94.14%	17.60%
Total attendance as % of total capacity	58.64%	64.71%	10.35%

Attendance at Free Events

As would be expected, percentage of capacity attendance at free events was significantly higher than at saleable events at 94% (80% in 2013). As the vast majority of free events were unticketed, these attendance figures were not derived from participants box office systems and were counted by the participants using alternative methods, which are not accurate (as is evidenced by three festivals recording attendance in excess of 100% of capacity).

Frequency of Attendance

Participants recorded that, on average, audiences purchased tickets for 2.39 events in each festival (1.6 in 2013[5]). This is similar to the average number of festival events purchased in the Theatre Forum Benchmarking, which was 2.3 in 2013.[6]

First Time Attenders

36.8% of attenders (32% in 2013) were attending for the first time, which means 63.2% of audiences are returning attenders. As a comparison, the average percentage of first time attenders in the Theatre Forum benchmarking was 57%, rising to an average of 64% for festivals.[7]

We speculate two reasons for this marked difference: firstly, the workshop nature of literary festivals may indeed mean a high percentage of returning attenders. Secondly, the low data capture rates of some participants. Consequently, we are not confident that this benchmark is robust and would expect improved data capture by participants to affect this benchmark considerably in future years.

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[5] Note: the calculation basis for frequency of attendance changed in 2014. The consultants recalculated 2013 frequency of attendance to ensure accurate comparison with the 2014 figure.

[6]Source: *Audiences for the Performing Arts in Ireland 2013* by Heather Maitland

[7]Source: *Audiences for the Performing Arts in Ireland 2013* by Heather Maitland

SALES/ PRICING

Box Office Revenue

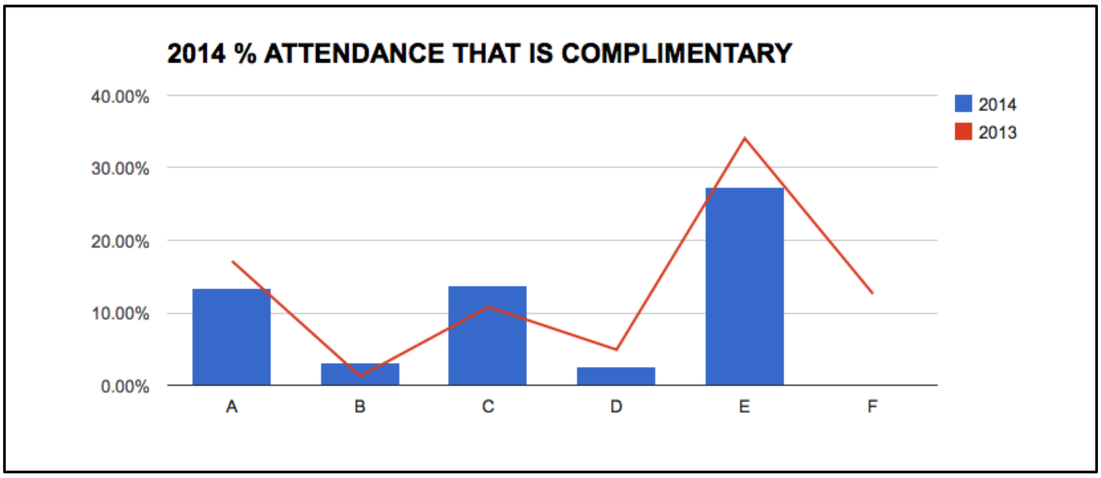
On average, the participants generated box office income of €36,250, a 6.8% drop from €38,901 in 2013. Again the range was vast: the highest box office revenue generated was €73,700 and the lowest €4,285. All festivals except one (Festival A) experienced a drop in box office revenue in 2014. Given that percentage capacity achieved was higher in 2014 than 2013, we would speculate that the average drop in income could be due to the reduced saleable capacity, which dropped by 12%.

	MIN	MAX	AVE	#	A	B	C	D	E	F
Box Office Revenue	4285	73700	36,249.87	6	32,296	73,700	56,527	44,914	5,777	4,285

	2013 Totals	2014 Totals	% Change	2013 Average	2014 Average	% Change
Box Office Revenue	€ 233,410.20	€ 217,499.20	-6.82%	€ 38,901.70	€ 36,249.87	-6.82%

Tickets Sales / Complimentary Tickets

On average, the participants issued 3,686 tickets and "comp'd" 481. There was, obviously, huge variance again, with one festival issuing over 7,000 tickets and another just 530. What might be more useful here is to look at the percentage of tickets given complimentarily, which averaged 12%, and ranged from 2.6% to 27.4%.



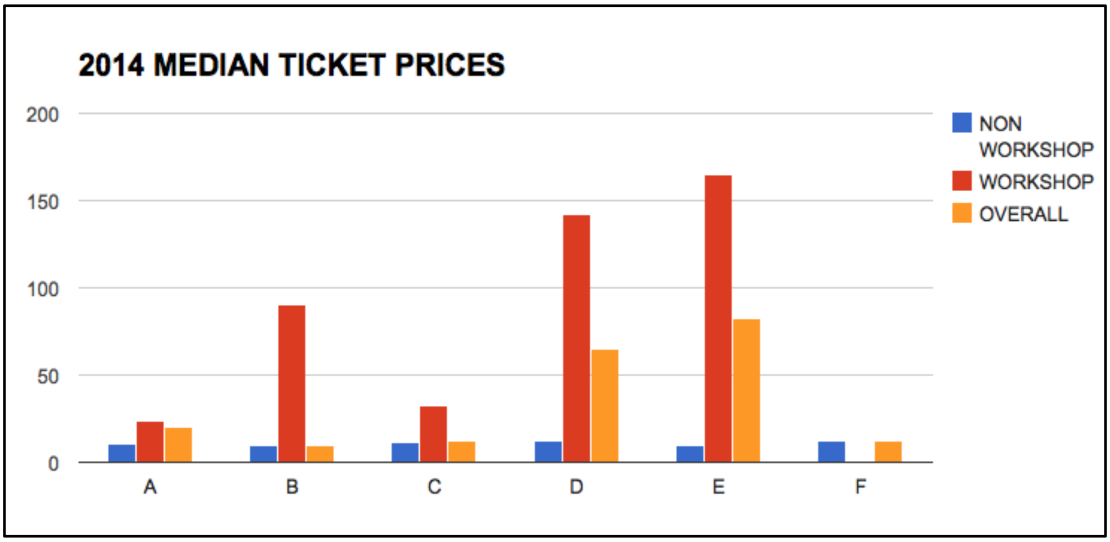
	MIN	MAX	AVE	#	A	B	C	D	E	F
% = Comps	2.57%	27.35%	12.03%	5	13.40%	3.07%	13.75%	2.57%	27.35%	

	2013 Average	2014 Average	% Change
% = Comps	13.47%	12.03%	-10.69%

Ticket Price

With event ticket prices ranging from €3 to €20 and workshop prices ranging from €5 to €180, average overall ticket price is of little significance. Instead we have looked at median ticket offer prices. The median non-workshop ticket price was €11.17, ranging from €10 to just €12.50.

There was no such consistency with workshop prices, where the festivals' median ticket price was €90.80, and ranged from €24 to €165. This may be due to the nature of workshops on offer, particularly if some are "residential" workshops spanning a number of days rather than just one session.



Looking at the least and most expensive ticket offer prices, there does seem to be some consensus that €20 is an upper acceptable limit for a non-workshop literary event. There was also some coalescence at the upper end pricing of workshops, with less variance between the festivals in this regard in 2014.

Ticket Yield

Ticket yield is the average ticket price actually paid including discounts and concessions. **Saleable ticket yield for participants was, on average, €14.80 (€13.15 in 2013).** To put it in an Irish context, the average ticket yield for participants in the Theatre Forum Benchmarking 2013 was €15.79, with the average ticket yield for festivals €18.41.[8]

	MIN	MAX	AVE	TOTALS	#	A	B	C	D	E	F
SALEABLE TICKET YIELD	10.98	23.22	14.80	73.98	5	11.26	10.98	11.38	23.22	17.14	
TICKET YIELD	5.24	23.22	10.71	53.54	5	8.74	5.24	7.79	23.22	8.55	

	2013 Average	2014 Average	% Change
SALEABLE TICKET YIELD	13.2	14.8	12.50%
TICKET YIELD	9.9	10.7	8.18%

Take home point: Lower ticket yields compared to the wider performing arts sector may be explained by low data capture, or by participant use of pricing to achieve social/accessibility objectives. If this is not the case, participants should consider ways to raise ticket yield to optimise box office revenue.

[8]Source: *Audiences for the Performing Arts in Ireland 2013* by Heather Maitland

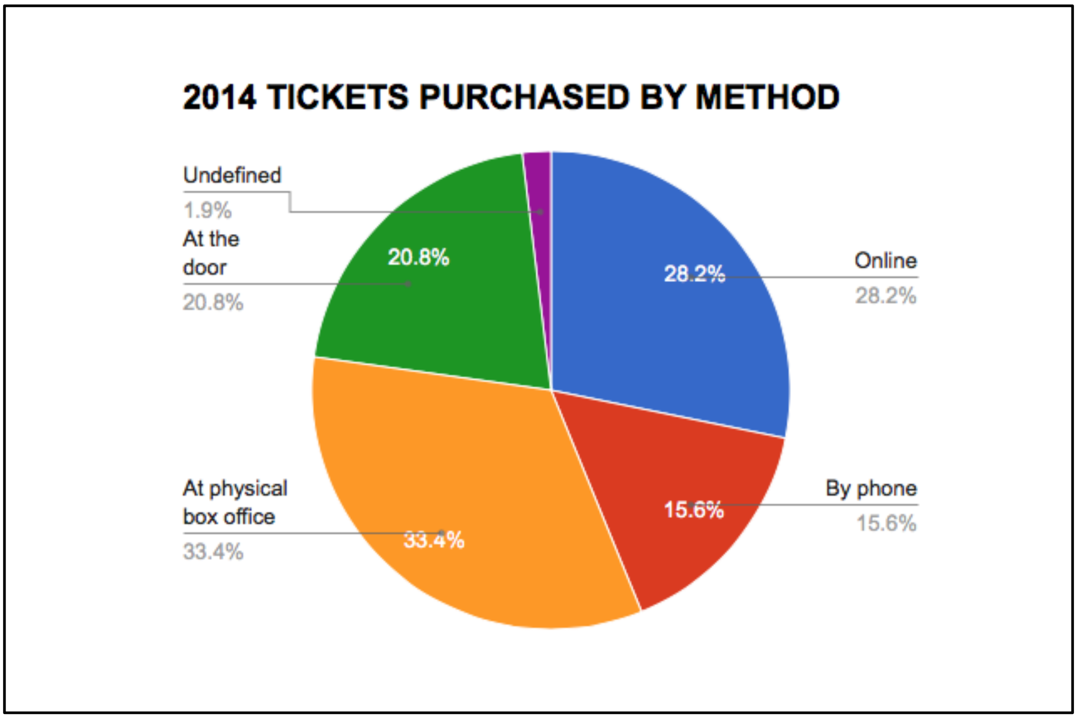
PURCHASING BEHAVIOUR

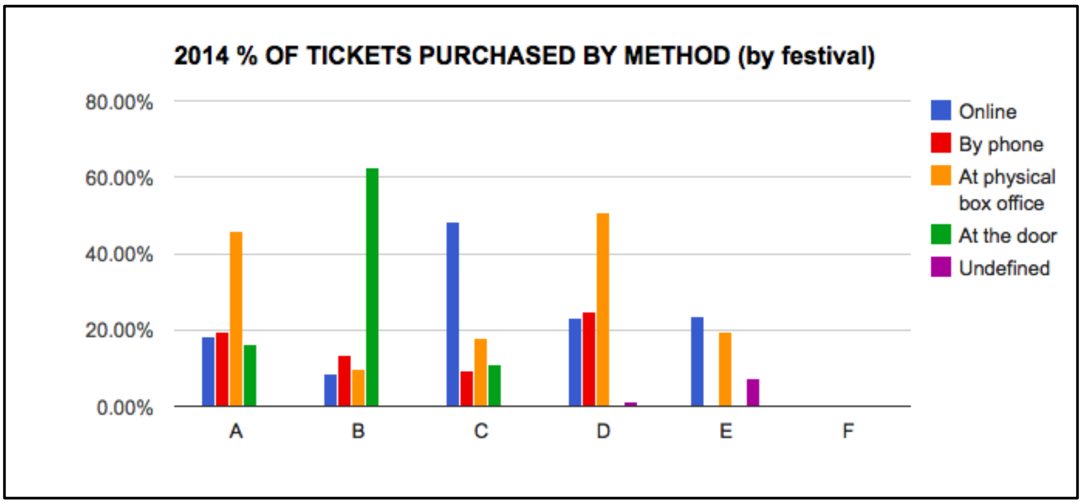
Purchasing Channels

On average, 28.2% of tickets were purchased online (35.2% in 2013), **15.6% by phone** (11.1% in 2013), **33.4% in a physical box office** (27.3% in 2013), **and 20.8% on the door** (9.5% in 2013), **with 1.9% undefined** (16.4% in 2013. The 25% increase in percentage door sales may be somewhat explained as previously undefined purchases being more accurately recorded as door purchases.

The 22% decrease in the percentage of tickets purchased online is somewhat unusual at a time when more and more ticketing activity is going online and is probably disproportionately affected by high reliance on door sales by three of the participating festivals. An "environmental" factor, which might affect online purchasing levels, is the quality of broadband access across Ireland, which varies considerably from county to county.

As is clear from the bar chart below, there are huge variances among participants. These figures are influenced by a number of factors, including what purchase options were provided by the festivals; whether or not participants "tagged" sales as phone / box office / door; and again, data capture rates.



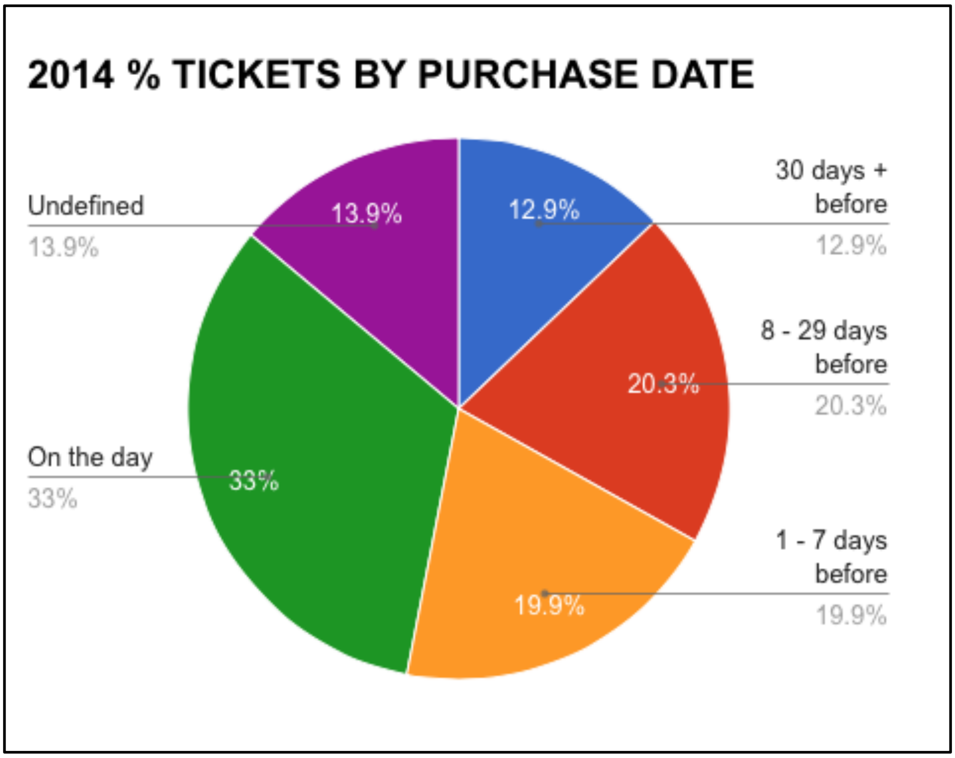


Take home point: Online ticket selling is by far the most resource-friendly channel and barriers to this channel should be removed where possible.

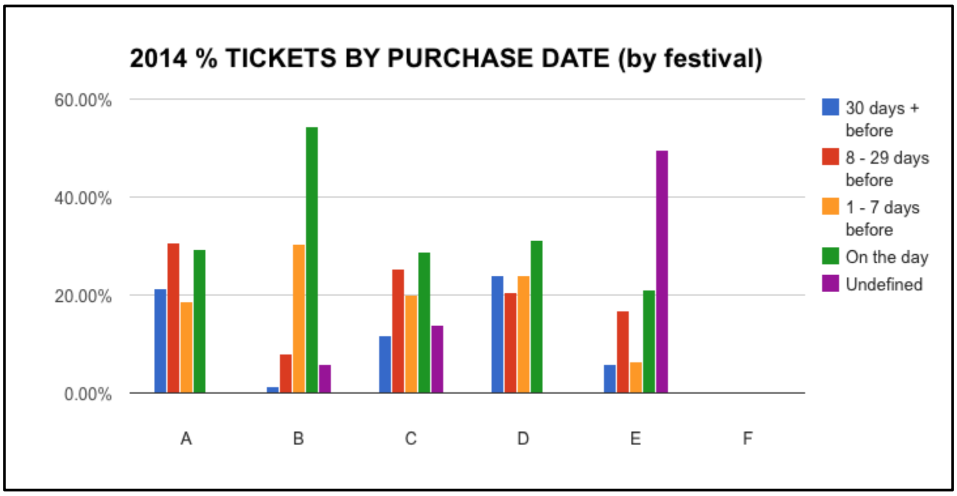
Advance Booking Trends

On average, 12.9% of tickets were purchased more than a month in advance (25.9% in 2013)**, 20.3% 8-29 days in advance** (21% in 2013)**, 19.9% 1-7 days in advance** (19.5% in 2013), **and 33% on the day** (24.1% in 2013), **with 13.9% undefined** (9.5% in 2013).

The 51% drop in the percentage of long-lead bookings and the even larger increase in "on the day" bookings are probably, again, disproportionally affected by reliance on door sales by three of the participating festivals. We understand from participants that long-lead bookers are more likely to be for workshops, so patterns may be affected by changes in when events were put on sale. The increase in "on the day" bookers is more worrying: optimising advance booking greatly improves festival cash flow and securing as much income as possible in advance means less will have to be spent on last-minute promotion of events.



Again the patterns vary considerably among participants. Festival B displayed the most precarious trend, with such a high percentage of "on the day" sales generating a "white knuckle ride" box office experience, as well as impacting on averages outlined above.



DIGITAL MARKETING

Introduction

This analysis was informed by a combination of participants' submitted data plus double checks and some additional pieces of information drawn from analytic work by the researchers from five participants' Google Analytics (GA) accounts to which we were granted access.

All participants bar one have installed GA on their websites. While this number seems equal to 2013, one festival's data was largely unusable last year so there is an improvement in the % of online traffic we can analyse.

No participant had e-commerce functionality correctly working on their site, although four responded that their ecommerce functionality was working (in three cases it was turned on but not set up). Likewise, none of the festivals had turned on demographics (though in three cases they believed it was working). Hence, while some progress in digital literacy was made in the last year, we cannot definitively track the percentage of sales driven by social media activity, email marketing or online advertising.

This remains a significant gap in participant knowledge: particularly, as is evident below, participants are expending considerable resources in promoting their festival online, but are not monitoring what activity actually drives sales.

Google Analytics

We did a sample check on the digital data submitted by the festivals, and when we found anomalies, we delved deeper and ran checks on everyone's Google Analytics (GA). This showed that many participants did not appear to have accurately pulled the requested figures from GA. We then determined we should use our collected numbers but have included a "health check" on self-reported numbers in each festival's personal appendix.

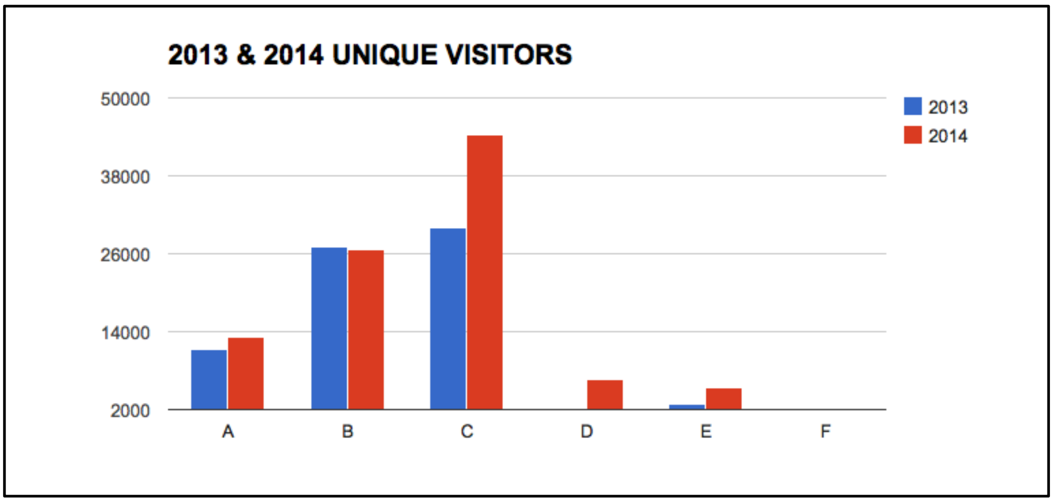
One major area where the answers were not accurate was in the functional use of e-commerce tracking. Four out of five respondents said they did have e-commerce functionality working but none of them were actually working upon closer inspection. Two festivals had it turned on, but none were functional. This means the tracking of individual orders/ events is still not possible for any festival.

Demographics are another area where three festivals responded that they were using this functionality on their site, and on inspection again this number was zero. This issue is potentially less serious though it should be an easy win for all festivals.

Take home point: it seems that training for the festivals in analytics installation, setup and reporting would be helpful both for the festival's own knowledge ease well as for future research into their audience's digital behaviour.

Web Traffic: Unique Visitors

For the five festivals that we could analyse, the date range included for analysis was from the day after the 2013 festival to the final day of the 2014 festival. **There were 27,588 website visits, on average, to each festival website, which represents just a 0.5% increase on last year's 27,436 visits.** This varied greatly among the five. The festival with the highest increase in page views was also the festival that had the highest percentage of tickets purchased online (48.12%, or essentially double the 24.31% average of online bookings).

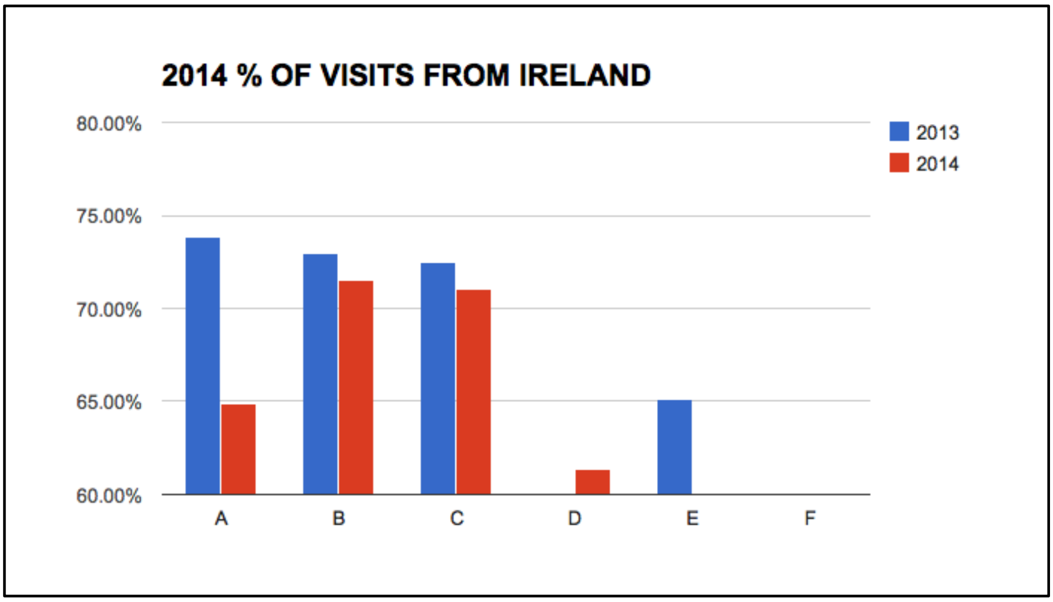


	MIN	MAX	AVE	TOTAL	#	A	B	C	D	E	F
No of visits	7,951	61,086	27,588	150276	5	19387	39523	61086	9992	7951	
No of unique visitors	5,466	44,350	19,229	108397	5	13066	26573	44350	6690	5466	
Page Views	13,100	137,925	65,660	362988	5	51886	92956	137925	32434	13100	

QUERY	2013 Average	2014 Average	% Change
No of visits	27,436	27,588	0.55%
No of unique visitors	17,794	19,229	8.07%
Page Views	75,731	65,660	-13.30%

Web Traffic: Geography

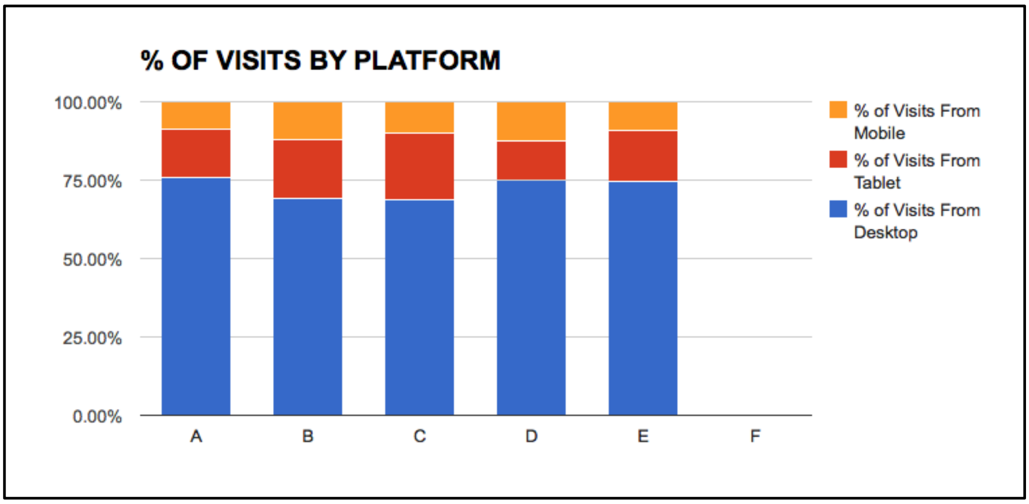
Similar geographic patterns are visible for the four festivals, with an **average of 71.1% of traffic to sites originating in Ireland.** It is possible that Festival E's relatively smaller overall traffic may contribute to their higher percentage of international visits (34.8%). The similarity of A, B & C is not surprising given that the same three festivals' reported international attendance was also similar (1.8% to 5.7%).



	MIN	MAX	AVE	TOTAL	#		A	B	C	D	E	F
Visits from Ireland	4,502	43,387	18,972	108773	5	Visits from Ireland	12579	28266	43387	6128	4502	
% of Visits from Ireland	0.00%	0.00%	69.12%	345.58%	5	% of Visits from Ireland	64.88%	71.52%	71.03%	61.33%	56.62%	

Traffic Platforms

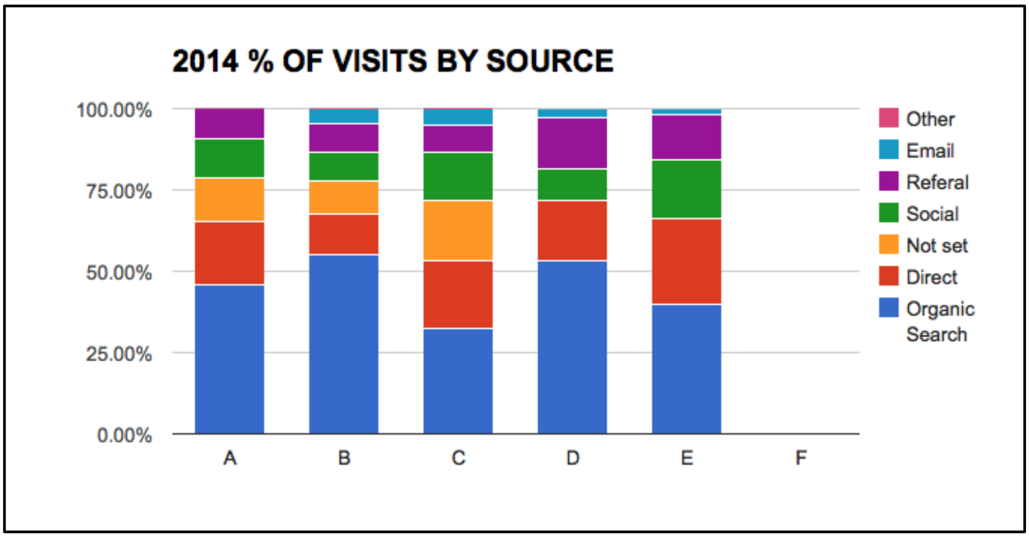
On average, 7.26% of web traffic was mobile and 15.16% from tablet. Unfortunately, as no one had ecommerce activated on their sites, we cannot tell what platform bookers are using or where in the booking process they are dropping off. We do know that, on average, 22.8% of traffic was not from desktops/laptops and this number will likely only rise, particularly as mobile phones currently account for 17% of global web usage and 21.6% of Irish traffic (as of Q4 of 2012).[9]



Just one of the participating festivals had a festival app, so no benchmarks were possible in this regard. Due to the expense of developing apps, arts events and festivals seem to be leaning towards creating mobile-friendly/responsive websites rather than apps going forward: four of the participating festivals had mobile-friendly sites in 2014. This may be an area worth benchmarking in more detail in the future.

Traffic Source Channels

The researchers gathered this information on their own to reduce the reporting burden on the festivals. This year we have changed our criteria in line with Google's new Acquisition Channels. It is a more generic attribution, which provides a more useful overview of traffic sources, for example Organic Search instead of Google and Bing and MSN, Social instead of Facebook and Twitter. Organic Search is the main source of site traffic for the five festivals (38.4%), followed by direct visits (16.54%). Social also accounted for a significant percentage (11.38%). As a result of a change in attribution there is no 2013-2014 comparison.



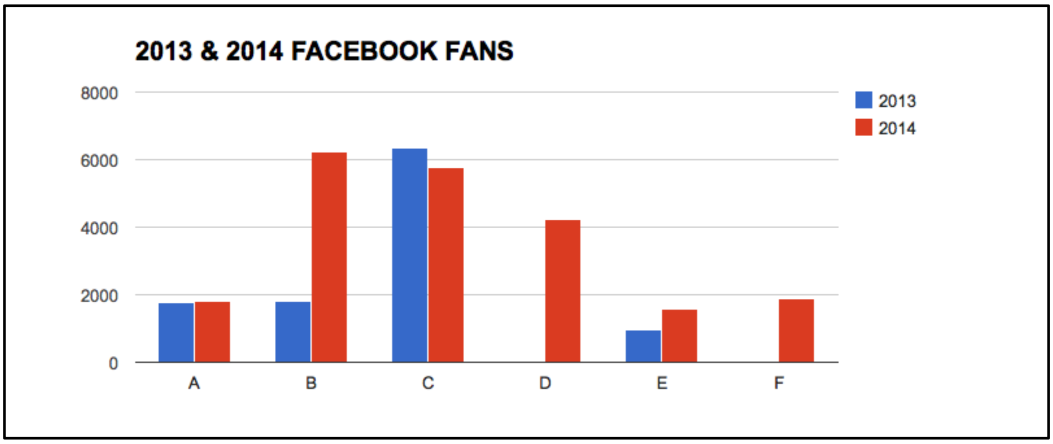
[9]Source: Statista.com - *http://www.statista.com/statistics/242313/percentage-of-mobile-website-traffic-in-eu-countries/*

	MIN	MAX	AVE	TOTAL	#	A	B	C	D	E	F
Organic Search	32.34%	55.12%	44.01%	41.83%	5	39.66%	55.12%	32.34%	53.31%	39.64%	
Direct	12.25%	26.74%	19.05%	18.02%	5	16.87%	12.25%	20.90%	18.48%	26.74%	
Not set	0.00%	18.54%	8.09%	12.81%	5	11.54%	10.39%	18.54%	0.00%	0.00%	
Social	8.98%	18.10%	12.44%	12.39%	5	10.53%	8.98%	14.89%	9.71%	18.10%	
Referal	7.72%	15.91%	10.86%	9.14%	5	7.72%	8.52%	8.27%	15.91%	13.90%	
Email	0.16%	4.99%	2.82%	3.87%	5	0.16%	4.74%	4.99%	2.58%	1.62%	
Other	0.00%	0.07%	0.02%	0.03%	5	0.01%	0.00%	0.07%	0.00%	0.00%	

Social Media

All participants use the main social media platforms, Facebook and Twitter, to varying degrees, with average Facebook fan numbers increasing by 76% between 2013 and 2014. All six festivals are on Facebook, five on Twitter, three on YouTube, two on Google+ and one on Instagram, for an average of 3.8 platforms per festival.

We did not ask festivals to report on social engagement levels. Without ecommerce we can't comment on what drives sales, although we do know that social media accounted for a sizable chunk of web traffic.



	MIN	MAX	AVE	TOTAL	#	A	B	C	D	E	F
Facebook	1,773	8,120	4,801	28805	6	1818	6240	5779	4224	1567	1901

Email Marketing

All participants had relatively large email databases, ranging from 835 to almost 5,000. While five participants indicated that the main purpose of their email marketing was to sell tickets, no participant had enabled its e-commerce functionality, making it impossible to accurately track if email activity did actually drive sales.

We did review the open and click-thru rates of the participants' most recent major email campaign, which yielded an average open rate of 29% and an average click-thru rate of 6.7%. These are greater than expected response rates: to put this in an Irish context, the average open rate for arts festivals emailings was 27% in 2013, and average click-thru rate was 4%.[10] It is not immediately obvious what might account for the high click thru rates.

	2013 Average	2014 Average	% Change
% opened	38.03%	28.95%	-23.86%
% click though	6.72%	6.75%	0.50%

[10] Source: *Audiences for the Performing Arts in Ireland 2013* by Heather Maitland

ADVERTISING

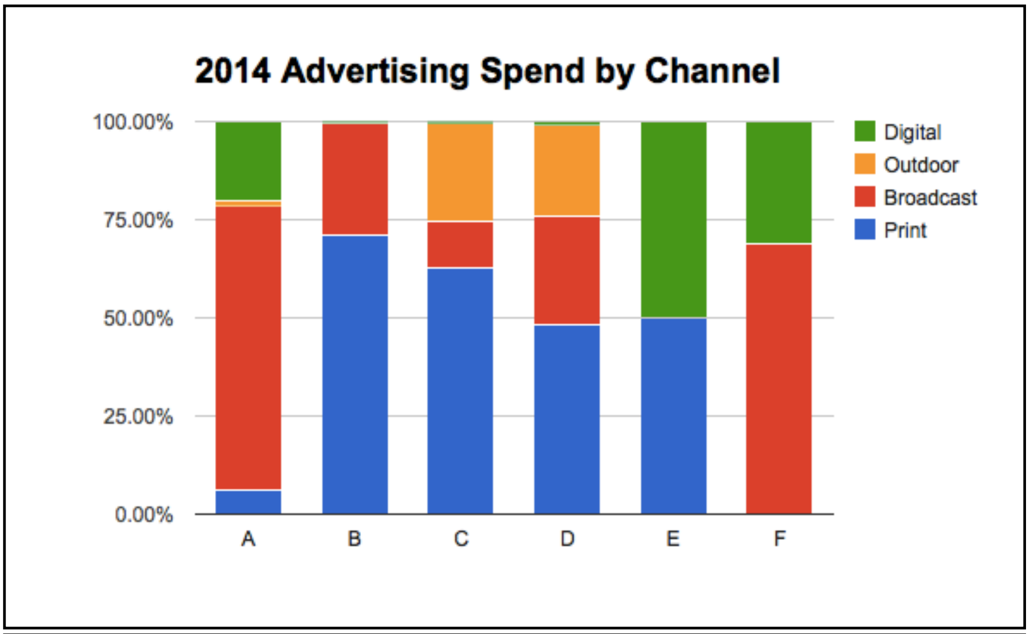
Online Advertising

In 2014, four of the festivals advertised on Facebook, one on Google and one with "Irish Times Online/other sites." The average spend per festival rose from €160 in 2013 to €653 in 2014. The soft impact of this can be seen in the general rise in unique visits to the festival sites. In future years with strong e-commerce tracking, the specific impact of various online ads on purchasing will be explicit.

	2013 Average	2014 Average	% Change	2013 Total	2014 Total	% Change
Total online advertising spend	160	653	308.24%	160	3,919	2349.43%

Offline Advertising

There were huge variances in spend on print, broadcast and outdoor advertising. Two participants invested in outdoor advertising (down from four), all six in broadcasting and five in print. The average amount spent on offline advertising was €13, 535 (up from €9,528) though this varied widely from €406 to €33,270. The three festivals assigning the highest percentage to digital are also the festivals with the lowest actual advertising spend. The table below clarifies how little the participant festivals are spending online compared to traditional advertising: just 4.6% of total advertising spend, on average.



	MIN	MAX	AVE	#	A	B	C	D	E	F
Print	0.00%	71.17%	39.68%	6	6.02%	71.17%	62.72%	48.15%	50.00%	0.00%
Broadcast	0.00%	72.47%	34.95%	6	72.47%	28.47%	11.92%	27.77%	0.00%	69.06%
Outdoor	0.00%	24.88%	8.26%	6	1.44%	0.00%	24.88%	23.22%	0.00%	0.00%
Digital	0	1	0	6	20.07%	0.36%	0.48%	0.86%	50.00%	30.94%

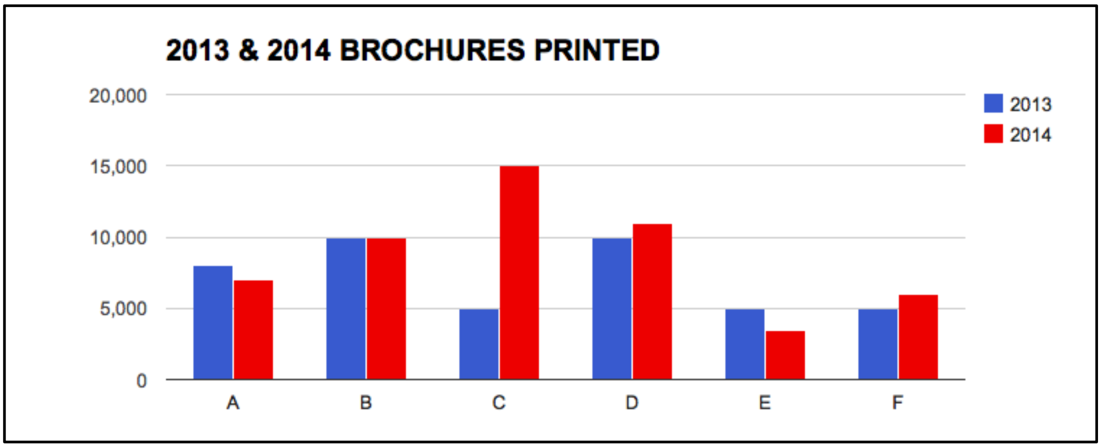
	2013	2014	% Change
Print	40.81%	54.68%	33.97%
Broadcast	40.65%	28.16%	-30.74%
Outdoor	18.25%	12.56%	-31.18%
Digital	0.28%	4.60%	1549.58%

Take home point: No participant used any "tracking" on its print, broadcast or outdoor advertising placement, so there is no data on whether such activity is worth the money spent on it. This is something that we would recommend participants to consider in future years.

OFFLINE MARKETING

Print Promotion

Participants produced, on average, 8,750 brochures, a 22% increase on 2013 (7,167). The significant increase in brochure production by one festival may account for this. Participants also produced an average of 16,417 other print promotional items each, but again this is mainly attributed to one festival producing a very large quantity of flyers.



	MIN	MAX	AVE	TOTAL	#	A	B	C	D	E	F
Brochures	3,500	15,000	8,750	52500	6	7,000	10,000	15,000	11,000	3,500	6,000
Flyers	0	90,000	16,417	98500	6	3,000	2,000	90,000	500	0	3,000
Other	175	5,500	1,638	9825	6	350	1,000	5,500	500	2,300	175

	2013 Average	2014 Average	% Change	2013 Total	2014 Total	% Change
Brochures	7,167	8,750	22.09%	43,000	52,500	22.09%

Direct Mail

While the usage of direct mail may be diminishing among art organisation, it remains that 40% of Irish arts attenders responded to direct mail, and 16% of arts attenders have bought or ordered something in the last year as a result of direct mail. [11]

Three of the participants mailed their brochures. Of these, two participants were able to calculate the return on investment on their brochure mailing (the ticket spend of the people who responded to the mailing divided by the unit direct mail cost).

Take home point: Participants would benefit from reviewing their direct mail processes, calculating ROI on brochure mail and considering how to optimise this promotional channel in future years.

[11] Source: *Arts Attendance in Ireland 2012: TGI 2012-2013* by Arts Audiences

CONCLUSION

Once again, the strongest insight from the 2014 Literary Festival Benchmarking pilot project's conclusion is what a difference more exact data will make to future years.

It is evident that that the quality of data capture is higher when the booker has to include their own information themselves, or when a box office staff member has time to collect the right amount of information from bookers, than when bookers are paying cash on a door. Whatever the festivals can do to increase data capture and quality will in turn increase their ability to allocate marketing and programming resources as efficiently as possible.

It is not only the fact that to not do so means these festivals will lack behind their peers in terms of audience knowledge. It is exciting to think what they **will** know, and **can** achieve, with more complete data collection, higher adoption of fit-for-purpose box office systems, more online booking (the purchasing method with the most complete data collection), the adoption of analytics and a commitment to working towards its maximisation with e-commerce, demographic and cross domain functionality.

ENDS