



A Qualitative Research Summary and Presentation for:

AEIA

'Summit for the Australian Live Entertainment Industry'

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OUTLINE



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BACKGROUND AND BUSINESS OBJECTIVES

The primary business objectives underpinning this research are threefold:

- ▶ Increase audience attendance by:
 - Growing new audiences; and
 - Encouraging the existing audience to attend more frequently.

- ▶ Inform the development of strategic and tactical direction for achieving this growth; and

- ▶ Provide a springboard to assist in the strategic objectives for the development of an industry brand and ensure that the AEIA effectively positions itself in a manner that is consistent with the Industry Brand.

RESEARCH OBJECTIVES

The specific research objectives underpinning the qualitative stage included to:

- ▶ Explore the depth and breadth of attitudes held by the community towards 'live performance' and 'live entertainment';
- ▶ Identify the key triggers encouraging attendance to attending live shows or genres;
- ▶ Determine the key barriers that continue to discourage attendance of live shows or genres as well as live performance overall.

This stage of the research will be followed (shortly) by quantitative research and will address the need to:

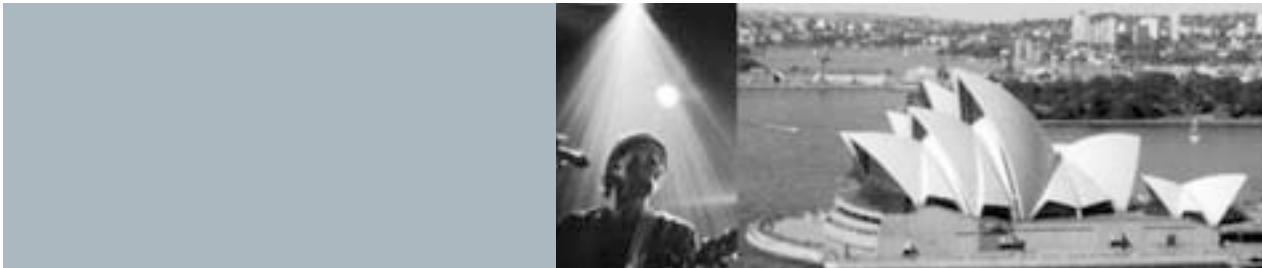
- ▶ Identify and prioritise the target markets in terms of their likelihood to increase their level of current attendance; and
- ▶ Quantify the potential for growth or conversion of the target markets of interest.

QUALITATIVE APPROACH

We conducted a total of five standard group discussions and four mini-group discussions (maximum of 6 participants) across Melbourne and Sydney. We also ensured a spread of ages (from 25 years to 55 years) across the genres and locations.

	Melbourne	Sydney	Total
Dance/Ballet	-	1	1
Opera	1	-	1
Contemporary Music	1	1	2
Musical Theatre	1	-	1
Theatre	-	1	1
Mix of genres (mini-groups)	1	1	2
Mix of genres (standard)	1	-	1
Total	5	4	9

THE KEY FINDINGS



A E I A

ATTITUDES TOWARDS 'LIVE PERFORMANCE' AND 'LIVE ENTERTAINMENT'

There is no denying, there is something special about 'live' – and it is the total experience of live that represents what the industry is all about.

This said, we recommend the essence of a brand identity developed for the industry must be underpinned by the experience of 'live'.

So what do attendees of live events get out of it? What do they believe they are actually buying when they purchase a ticket to a live event?

Some are able to better articulate this than others, however the essence of the experience is similar for all, across age, gender and genre...

A unique, stimulating and emotional experience that is an 'occasion' – creating a valued memory and sense of personal involvement, growth and self importance

I was there, I was part of it

ATTITUDES TOWARDS 'LIVE PERFORMANCE' AND 'LIVE ENTERTAINMENT'

Unique:

- ▶ Every performance is different;
- ▶ Limited opportunities to see any one particular performance.
- ▶ Element of unpredictability
- ▶

ATTITUDES TOWARDS 'LIVE PERFORMANCE' AND 'LIVE ENTERTAINMENT'

Stimulating:

- ▶ Sense of anticipation.
- ▶ Audience atmosphere.
- ▶ Thought provoking.
- ▶ All of the senses come alive and are enticed – *"you have to actively participate (engage) to get the most out of it", "like kinetic energy", "a real buzz", "has a physical feel – gets you all over";*
- ▶ Often involves so much more than the performance, such as spending time with others, dinner at a restaurant, drinks at a venue, supper afterwards – a real sense of occasion.

ATTITUDES TOWARDS 'LIVE PERFORMANCE' AND 'LIVE ENTERTAINMENT'

Emotional experience:

- ▶ An opportunity to interact/connect with the performer – *"they may even look at you"*.
- ▶ Can be confronting/challenging as well pleasurable and enjoyable.
- ▶ Engages you on an emotional level – *"gets to the core of you", "can send shivers up your spine", "a rush", "absorbing", "surreal", "intrigue", "goose bumps"*.

ATTITUDES TOWARDS 'LIVE PERFORMANCE' AND 'LIVE ENTERTAINMENT'

Memorable:

- ◆ The experience stays with you.
- ◆ Being part of something that relatively few people have the opportunity or choose to share in.
- ◆ Associated with a particular time in your life.
- ◆ A shared memory with another/others.

ATTITUDES TOWARDS 'LIVE PERFORMANCE' AND 'LIVE ENTERTAINMENT'

Personal involvement, growth and self importance:

- ▶
- ▶ You own the experience, it's all yours – *"you feel privileged to be able to connect with someone you really admire and respect"*;
- ▶ Feel good about doing something positive for yourself;
- ▶ Also delivers a sense of belonging or being part of something 'bigger';

ATTITUDES TOWARDS 'LIVE PERFORMANCE' AND 'LIVE ENTERTAINMENT'

Personal involvement, growth and self importance:

- ▶ Depending on the venue and genre, there is often license to interact with others in the audience, including people you don't know, and delight in the shared experience.
- ▶ Can shape your views/perspectives on particular issues or performers – generates ideas, discussion.

Attendance typically considered a treat or something special – not an everyday experience, or even a regular experience for most in our sample.

"It's a night out, something different, but not something you would do every week"

IMPLICATIONS OF TERMINOLOGY

On first glance, it would appear there is little difference between the terms 'live performance' and 'live entertainment'. However, it is important to take heed that each term creates a different expectation of the tone of the live event.



Live Performance - Expectations

- ▶ Creates expectation of a high quality/skilful performance:
 - Showcasing 'real' talent;
 - Level of preparation and effort underpinned by real passion for what they are showcasing;
 - Implies a stage/theatre type venue where acoustics and production elements are at their best;
 - More formal e.g. allocated seating, getting dressed up.

IMPLICATIONS OF TERMINOLOGY

- ▶ Expectation that the audience will be engaged by the performer/performance;
 - Intellectual edge – can be lighter e.g. thought provoking comedy, but typically heavier and more engaging; ▶
 - Evokes a strong sense of anticipation, lights go down, audience quiets down, excitement builds, hushed whispering, then no more talking...

More high brow

IMPLICATIONS OF TERMINOLOGY (Cont)

Live Entertainment - Expectations

- ▶▶ Flashy, glitzy, big sets, visually stimulating – a spectacle:
 - Not necessarily as polished as a 'live performance';
 - Typically relies on high energy to entertain.

- ▶ Or more casual and spontaneous – *"can relax and be entertained at the same time"*

IMPLICATIONS OF TERMINOLOGY (Cont)

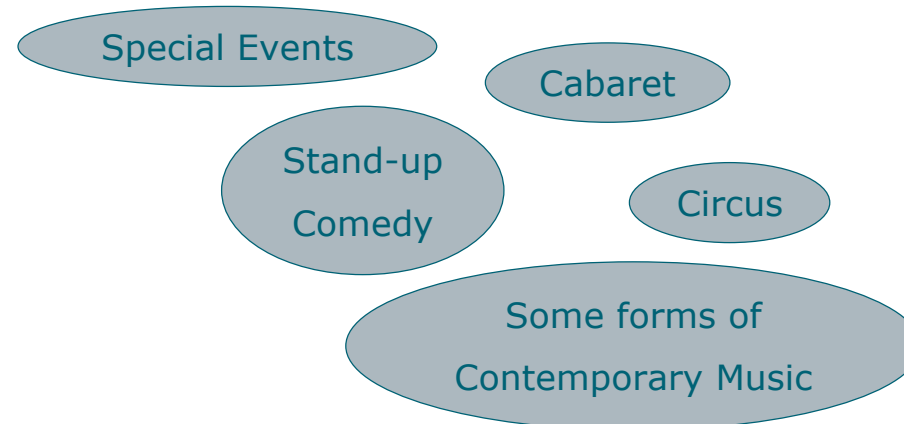
- ◆ Implies something light/frivolous – can be consumed passively and does not require the audience to engage;
 - Do not expect to be challenged by 'live entertainment' – "*It washes over you*", "*Is less demanding*";
 - Do not expect it to be as polished as a 'live performance'.
- ◆ Something that is not the focus of the 'event'/'venue' – can be going on in the background;
- ◆ Free or very low cost e.g. a cover charge to get into the venue

More down market

IMPLICATIONS OF TERMINOLOGY (Cont)

Live Performance - Genres Implied

- ▶ The more traditional performing 'arts' genres are most strongly associated with this term:
 - *Ballet, classical/jazz music, opera, theatre (Shakespeare), some higher profile musicals*
- ▶ Other genres float between 'live performance' and 'live entertainment' depending on past experience and perceptions of the quality of the act...



But performance=entertainment
Hence live 'entertainment' considered superfluous

IMPLICATIONS OF TERMINOLOGY (Cont)

Live Entertainment – Genres/Events Implied

- ▶ Smaller or local venues:
 - Pub band – Espy in St Kilda was a common reference - Crowded, noisy, sticky carpet, stuffy/smelly;
 - RSL Clubs – particularly in Sydney.
- ▶ Floor show:
 - Dinner and show;
 - Casino shows.
- ▶ Incidental 'entertainment':
 - Street performers/buskers/jugglers;
 - Jazz band in the corner prior to opera performance;
 - Drag queen.

"A stripper or pole dancer can be live entertainment"

IMPLICATIONS OF TERMINOLOGY (Cont)

- ◆ Festivals (although performances within festivals also sit within 'live performance') – one example is The Big Day Out.
- ◆ Some pop and rock music (does not include all contemporary music – tends to be those perceived to be more about spectacle than raw talent).
- ◆ Also includes genres outside the industry such as sport and other mediums including television and the internet.

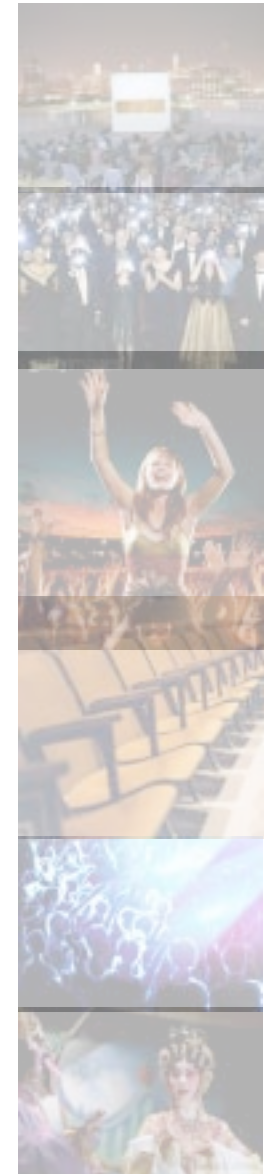
"Bert Newton is live entertainment"

"So is the footy"

TRIGGERS FOR ATTENDANCE

In the group discussions participants were asked to develop a **decision making tree** reflecting the decisions and processes involved around the most recent live performance event they attended.

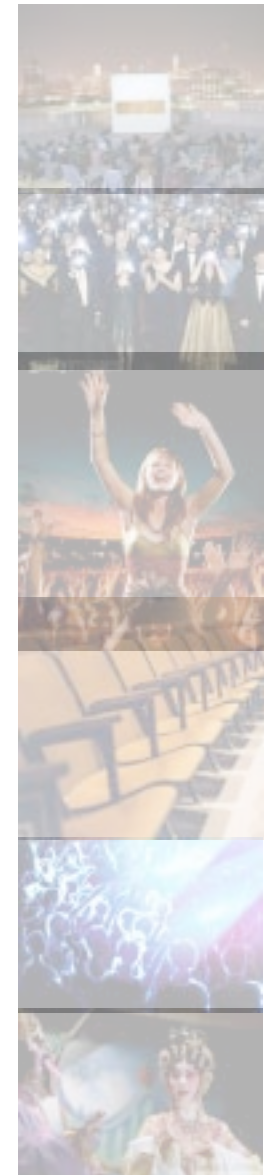
This exercise helps us understand **what triggers interest in attending a particular event**, as well as **all of the arrangements involved leading up to and around the actual event**.



TRIGGERS FOR ATTENDANCE

We found people are either **actively seeking** to attend particular genres of performance or are simply **open to live performance and look out for events of interest**, but are less active in seeking it out.

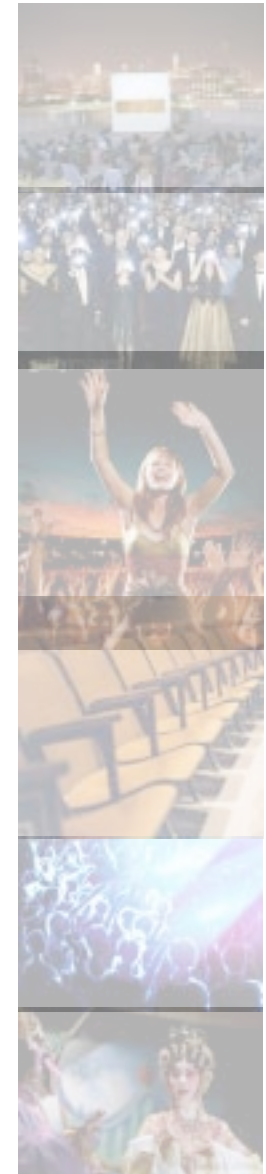
There are yet others who are **open to events that are suggested by friends/family/colleagues and arranged by them**, but they themselves would be unlikely to initiate.



TRIGGERS FOR ATTENDANCE

ACTIVELY SEEKING A LIVE PERFORMANCE

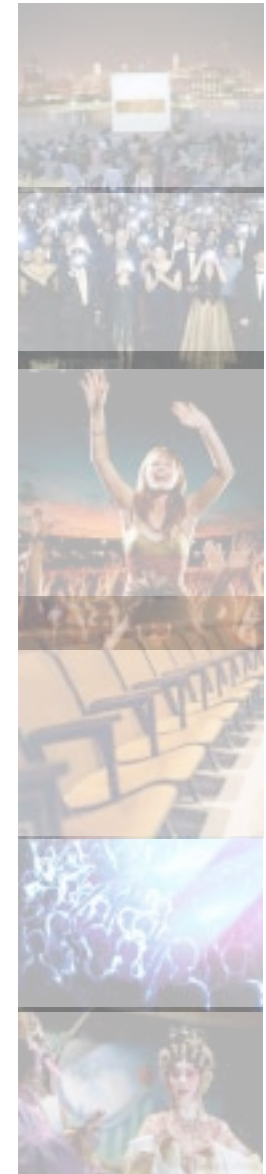
- ▶ Have previously seen a version of the live performance and enjoyed it.
- ▶ Are familiar with a performer/performers, director/choreographer, writer/composer, producer and interested in their work.
- ▶ Have a membership or subscription (eg. theatre, opera, ballet – can be a gift and usually generated by exposure in formative years or personal participation in the genre), or are registered with a ticket distributor (e.g. Ticketek or Ticketmaster7):
 - Promoted by promotional material posted or emailed to them;
 - Special deals/discounts.



TRIGGERS FOR ATTENDANCE

ACTIVELY SEEKING A LIVE PERFORMANCE

- ▶ Pick up a brochure/flyer when attending another performance.
- ▶ Frequently check out the entertainment guide in The Age or other newspapers.
- ▶ Availability of discount offers such as group, seniors, student, early bird, last minute/half ticks

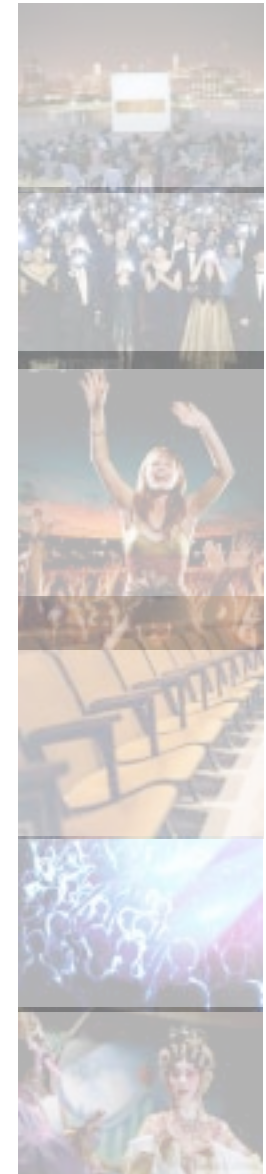


TRIGGERS FOR ATTENDANCE

NOT ACTIVELY SEEKING LIVE PERFORMANCE

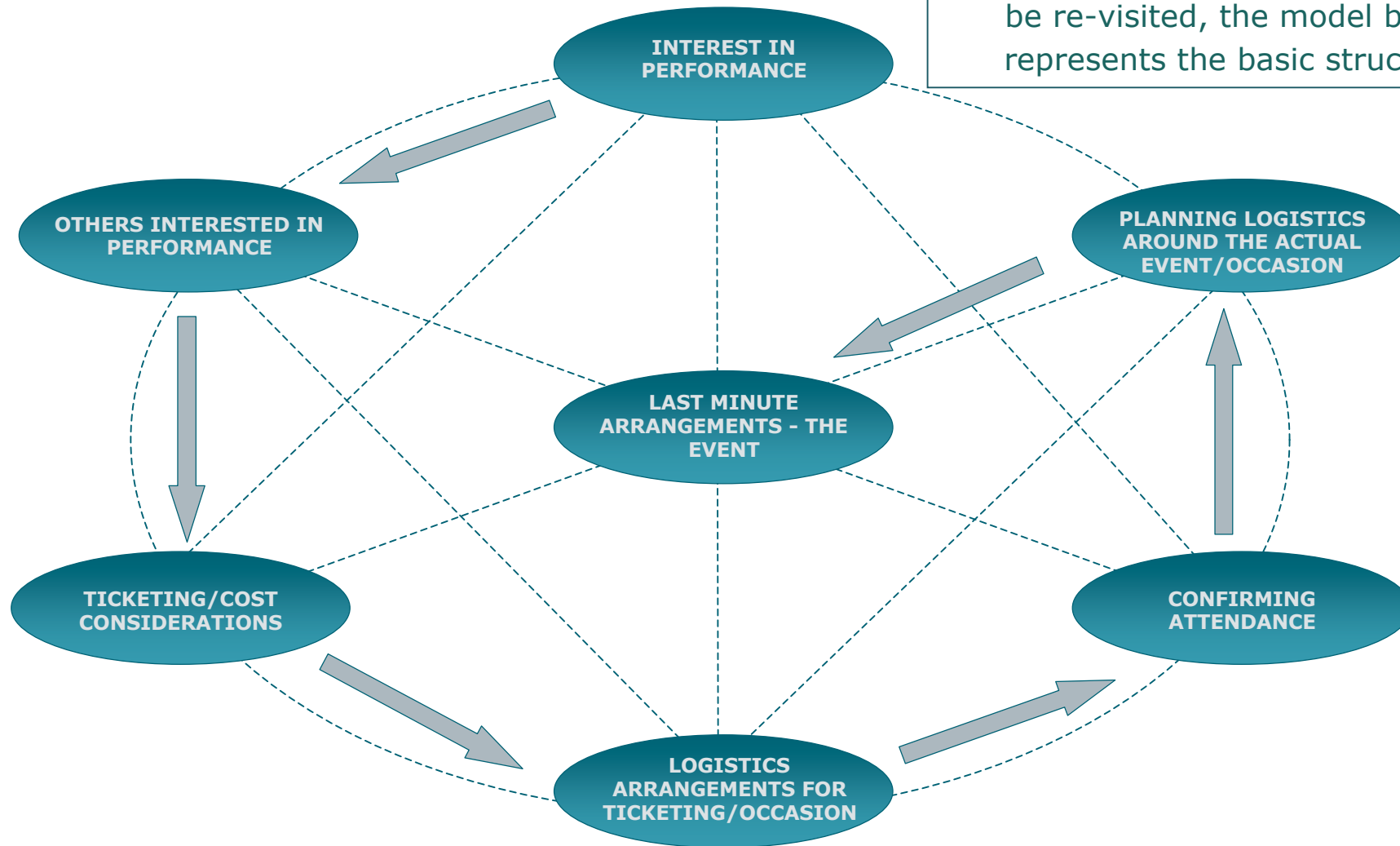
- ▶ Notice advertising, incidentally:
 - Outdoor/Billboards;
 - TV;
 - Newspaper;
 - Radio;
 - Direct Mail;
 - Walking past venue.
- ▶ Read review in newspaper/magazine.
- ▶ Word of Mouth – suggestion/invitation from others.
- ▶ Receive ticket as a gift.
- ▶ Friend in a particular performance.

The area of gifting, including promotion and packaging and distribution (at least perceptually) appears to be highly under utilised in this industry



THE DECISION-MAKING PROCESS

Although decisions are not always made in this order and some steps can be re-visited, the model below represents the basic structure.



DECISION MAKING PROCESS: WHAT'S INVOLVED?

INTEREST IN PERFORMANCE

- ▶ Who is in it?
- ▶ What's it about?
- ▶ Seen it before? Familiar with it?
- ▶ Quality of performance?
- ▶ Suitable for kids?
- ▶ Venue/performance compatibility?
- ▶ What are others saying?

OTHERS INTERESTED IN PERFORMANCE

- ▶ Gauge initial interest?
- ▶ Availability – preferred and alternative times/dates?
- ▶ (May be a gift from/to someone so these issues are not considered)

TICKETING CONSIDERATIONS

- ▶ Cost of tickets?
 - discounts?
 - concessions?
- ▶ Other items may need to include?
 - meals
 - parking
 - chauffeur
 - accommodation
- ▶ Payment options?
- ▶ Who pays?

DECISION MAKING PROCESS: WHAT'S INVOLVED?

LOGISTICS

- ▶ Venue?
 - In relation to home work, others interested?
 - How to get there – public transport options, parking nearby?
 - Time of performance
- ▶ Ticket availability on preferred date?
- ▶ Seating arrangements?
- ▶ Length of show?
- ▶ Accessibility?
- ▶ Organising babysitter?
- ▶ Arranging time off work?
- ▶ How to collect tickets once purchased?
- ▶ Accommodation/restaurant booking if required?

CONFIRMING ATTENDANCE

- ▶ Reconfirming numbers after gauging initial interest – tickets purchased
 - Generally based on cost and logistics

DECISION MAKING PROCESS: WHAT'S INVOLVED?

PLANNING THE OCCASION

- ▶ Transport?
 - taxi
 - public transport
 - driving
- ▶ Timing of everything want to do/getting there?
- ▶ Pre/post drinks/meal?
- ▶ Organising babysitter/children if necessary
- ▶ Leaving work

THE EVENT

- ▶ Meeting point?
- ▶ Parking
- ▶ Which entrance?
- ▶ Pre/post drinks/meal/supper – location - time
- ▶ Transport home?

PERCEIVED BARRIERS TO ATTENDANCE

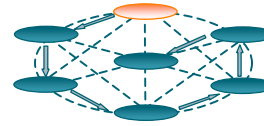
It would appear from the decision making process and logistics involved with attending a live performance that there are several opportunities for barriers to arise, particularly as decisions can be revisited throughout the process.

However, having said this, once interest has been cemented (generally in the first two stages), a lot of the more logistical decisions are often navigated, albeit sometimes time consuming/a hassle/frustrating.

By this stage, people have typically made the commitment to attend and will try to overcome any obstacles.

Although cost can still get in the way. The following attempts to address the most common barriers that discourage/prevent attendance prior to the confirmation stage.

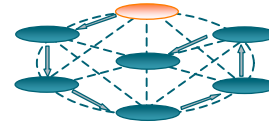
PERCEIVED BARRIERS TO ATTENDANCE (Cont)



INTEREST IN PERFORMANCE

- ▶ Once aware of the event, the level of interest depends on various factors:
 - **Prior experience with the genre/type of performance** and/or performer;
 - **Expectation of the quality of the event** which is based on the level of media support, past/performers/ directors/others involved (over exposure of particular performers can be a disincentive)

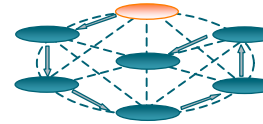
PERCEIVED BARRIERS TO ATTENDANCE (Cont)



INTEREST IN PERFORMANCE

- ▶ Lack of experience or exposure to a genre/performer can be a major hindrance as there is **no option to try before you buy**).
- ▶ Implications include:
 - **The importance of advertising/communication which gives a real taste of what can be expected**, either visually or descriptively;
 - **Provision of sampler CDs/downloads** e.g. short Mpegs linked to ticketing websites;
 - **Highlight importance of festivals** where wider range within and across genres can be more readily sampled (particularly important for contemporary music);
 - **Cross selling discount offers which encourage trial of other genres** e.g. when purchase ballet or classical music tickets discounted tickets offered to an upcoming opera event.

PERCEIVED BARRIERS TO ATTENDANCE (Cont)

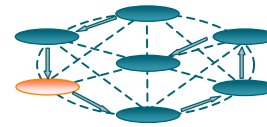


- ▶ The **location of the venue can also be a deterrent** – especially if unfamiliar or perceive difficult to get to/park etc:
- ▶ The other issue with venue is the **perceived suitability of it for the event**. Common attributes of preferred venues are historical relevance (adds to sense of occasion), smaller seating capacity (bringing audience closer to performance/ performer), and quality acoustics.

FINDING OTHERS INTERESTED IN PERFORMANCE

- ▶ This is much **more of an issue for those with young families, singles** or if have **peer group/partner that are a lot less interested** in particular genres/live performance in general.

PERCEIVED BARRIERS TO ATTENDANCE (Cont)



TICKETING & COST CONSIDERATIONS

- ▶ **Cost** comes into the decision making process very early on and represents one of the **major deterrents to higher frequency of attendance**:
 - Cost considerations are also about **everything else around attending the event** e.g. meals, parking, public transport, drinks, potentially accommodation, a babysitter – hence **value add offers will ease this burden** and could encourage attendance.

- ▶ The **availability of desired tickets** (hindered if find out about event well after tickets go on sale) **and level of comfort with the purchasing channel** also present a barriers that can discourage attendance.

▶ **What are the implications of these issues?**

▶ **DNA**

THANK YOU

