

Audiences
What Keeps Them Away

META AUDIENCE RESEARCH

by Dave Cross

Generator commissioned an extensive research programme to find out what prevented people from attending gigs.

REPORT TO GENERATOR NORTH EAST LIMITED
AUDIENCE DEVELOPMENT PROJECT

SURVEY OF GENERAL PUBLIC

PREPARED BY: SCOTINFORM LTD
FINAL REPORT - 21st MAY 2001

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BACKGROUND

This report details the main findings to emerge from the quantitative research study conducted by Scotinform Ltd on behalf of Generator North East.

The aim of the study was to look at the views of non-attendees of live popular music events in terms of their attitudes to and perceptions of live popular music and barriers to attending live events. Interviews were conducted across the North East of England and Cumbria during April 2001.

A total of 355 interviews were conducted with residents living in the following areas:

Location	Number of respondents	%
Middlesborough City Centre	75	21
Cumbria	67	19
Newcastle City Centre	51	14
Blyth	41	12
Sandyford/Heaton/Jesmond	38	11
Sunderland	36	10
Redcar/Stockton	26	7
Durham	21	6

Throughout this report (*) denotes less than 1% of respondents.

RESEARCH FINDINGS

Profile of Respondents

The first section of the report details the demographic profile of interviewees.

The profile of respondents was based on achieving an even split of men and women. The target group of the research study was young people aged between 16 and 35 years old of which, the majority of the sample interviewed were aged 16-20 years old (52% of respondents) and just over a fifth (22% of respondents) were aged 21-25 years old. A quarter of the sample were aged 26 years old and over.

As you would expect, just over two thirds of the sample had no children living at home and a fifth had one child aged under 16 years old living at home. One in ten respondents had two children and only 4% had three or more children.

Respondents were also selected on the bases that they had not attended a live music performance in the past two years, but were interested in attending a live music event in the future.

Table One: Profile of interviewees

Base = all respondents (355)

		No. of respondents	%
Age:	16-20 years old	185	52
	21-25 years old	78	22
	26-30 years old	60	17
	31-35 years old	32	9
No. of children under 16 in household:	None	227	64
	One	78	22
	Two	36	10
	Three	10	3
	More than three	3	1
	Not stated	1	*

47% of respondents were in employment, 34% were students and 13% were unemployed.

		No. of respondents	%
Occupation :	Employed	167	47
	Unemployed	47	13
	Caring for home/family	16	5

Student	119	34
Self-employed/freelance	4	1
Other	1	*
Not stated	1	*

Attendance at Live Music Events

Respondents were first asked if they were interested in attending a live music performance in the future.

Over three quarters of respondents were interested in attending a live music event with respondents aged 25 years old and under were the group most likely to be interested in attending.

Respondents from Middlesbrough, Redcar/Stockton and Durham expressed the highest level of interest in attending a live music event.

Table Two: Level of interest in attending a live music event

Base = all respondents (355)

	%
Very interested	37
Quite interested	40
Neither/nor	12
Quite uninterested	10

Type of Live Music Event of Interest

Respondents were next asked to indicate the type of live music event that they would be most interested in attending.

Table Three below shows that pop music was rated the highest across all age groups (61% of respondents stated that they would like to attend a pop music event) with 48% of respondents stating dance music. A rock music event was of interest to 36% of respondents followed by indie music mentioned by 23% of respondents. Rock music tended to be mentioned by respondents aged 26 years old and over, whereas dance music was most likely to be mentioned by younger respondents aged 25 year old and under. An indie music event was of interest to all age groups, whereas R 'n' Blues was of most interest to respondents aged 21-25 years old.

Table Three: Type of live music event most likely to attend

Base = all respondents (355)

	%
Pop	61
Dance	48
Rock	36
Indie	23
R 'n' Blues	21
Soul	15
Reggae	10
Metal	4
Punk	3
Hip-hop	2
Underground	2

Reasons For Non-Attendance at Live Music Events

Respondents were asked (unprompted) to give their reasons for not attending live popular music events.

Table Four shows that just over a quarter of respondents (27%) considered live popular music events to be too expensive. Respondents living in Cumbria (34% of respondents), Sunderland (33% of respondents) and Middlesborough (28% of respondents) were more likely than average to say that they had not attended a live music performance in the past two years as they had too far to travel.

Lack of information about live gigs was mentioned by 15% of respondents, as a reason for non-attendance at live music events whereas admission charges at local venues and the lack of variety of local bands were mentioned as a deterrent by 12% of respondents respectively. Respondents in Redcar/Stockton were the group most likely to state that they were not interested in attending events by local bands. Only 5% of respondents mentioned poor selection of venues as a reason for not attending live music events. One in ten respondents from Sunderland mentioned poor selection of venues, as did 8% of respondents based in Middlesborough.

Table Four: Reasons for non-attendance (unprompted)

Base = all respondents (355)

	%
Live music performances are too expensive	27
Too far to travel to see a live music gig	20
I don't know what is on	15
Admission charges are too high at local venues	12
Little variety of local bands	12
No time/too busy	13
Not interested in seeing local bands	7
Lack of child care	7
Poor selection of venues	5
Local bands are not value for money	1
Others	9

Purchasing Habits of Music Products

In order to look at levels of interest in music, respondents were asked how often they purchased CDs/cassette tapes/DVDs or other music related products. Respondents aged 16-20 years old and those living in Middlesborough were the two groups most likely to purchase music products 2-3 times a month or more often. Men tended to purchase music products more frequently than women. 64% of men purchase CDs/cassettes/DVDs or other products once a month or more often compared to 57% of women.

Table Five: Purchasing behaviour of music related products

Base = all respondents (355)

	%
2-3 times a month or more often	33
Once a month	28

Once every 2-3 months	19
Occasionally	19
Never	2

Visits to Local Venues to See a Live Music Event

43% of respondents had attended a local venue to see a live popular music event over two years ago, and 57% had not. Respondents aged 31-35 years old and those living in Sunderland and Cumbria were more likely than average to have attended a local event in the past. Respondents were asked to name three venues, which they had visited in the past to see a live popular music event.

Table Six shows that the main venues were:

Newcastle City Centre: the *Telewest Arena*, *The Mayfair*, *The Riverside* and the *City Hall*.
 Cumbria: *The Warehouse*, *Sands*, *Miners Arms*, *Buskers*, *General Wolfe*, *Blues Night Club*, *Freedom*, *Twisted Wheel*, *Mercury Lodge* and *Front Page*.
 Sunderland: *Liberties* and *Royalty*.
 Middlesborough: *Dickens Inn* and *Middlesborough Town Hall*.

Table Six: Venues visited in the past

Base = those who had visited a local venue to see a local band performing live. Total = 152

		%
Newcastle City Centre:	<i>Telewest Arena</i>	32
	<i>City Hall</i> , Newcastle	18
	Student Union, Newcastle	11
	Gateshead Stadium	6
	<i>Riverside</i> , Newcastle	2
	<i>Whitley Bay Ice Rink</i>	4
Cumbria:	<i>The Warehouse</i> , Penrith	7
	<i>Sands</i> , Carlisle	7
	<i>Buskers</i> , Carlisle	3
	<i>Blues Night Club</i> , Penrith	2
	<i>Freedom</i> , Carlisle	2
	<i>The Twisted Wheel</i> , Carlisle	2
Middlesborough:	<i>Middlesborough Town Hall</i>	5
Sunderland:	<i>Liberties</i> , Sunderland	2
	<i>Royalty</i> , Sunderland	2
Local pub		6
Pub in Blyth		3
Others		34

Rating of Bands Performing Locally

In order to look at perceptions of the bands that perform locally, respondents were asked to rate the bands that they had seen performing live in their area. 52% of respondents rated the bands that they had seen as good with only 11% rating them very good. Just over a quarter of

the sample rated the bands, which they had seen as average.

Table Seven: Perceptions of bands

Base = respondents who had seen a band performing locally (193)

	%
Excellent	11
Good	52
Average	27
Poor	7
Very poor	2

One in ten respondents rated the bands that perform in their area as poor. The main reasons given were that the style of music was not appealing, preference for larger touring bands, quality of bands was poor, bands were not professional enough and that there was little choice of local bands.

Factors Which Would Motivate Attendance

Generator North East wished to determine what factors would motivate attendance at live music performances. Respondents were asked (unprompted) what would encourage them to attend a performance of live popular music.

Cheaper admission prices, better variety of bands and better choice of venue were the three most important factors that would encourage attendance at live music performances.

When asked unprompted only 5% of respondents mentioned promotional nights/special offers on tickets, however when prompted this figure rose to 35%. Suggesting that ticket pricing was one of the main barriers to attendance amongst non-attendees.

Table Eight: Factors that would encourage attendance at performances (unprompted)

Base = all respondents (355)

	%	%	%
	unprompted	prompted	total
Cheaper admission charges	42	26	67
Better variety of bands	17	26	43
Better choice of venues	15	15	30
Cheaper food and drink	9	18	27
More advertising	8	18	26
More different styles of music	8	23	30
Better transportation links	7	17	24
More innovative bands	6	9	15
Special offers on tickets/promotional nights	5	30	35
Better atmosphere in local venues	4	9	13
Improved timing of gigs	1	6	7
Others	20	n/a	20
Don't know	3	15	0

Distance Prepared to Travel to Gigs

Respondents were next asked how far they were prepared to travel to attend a performance by a local band.

Table Nine below, shows that there was no distinct pattern in terms of the distance

respondents would travel to see a live music performance as a fifth of respondents would travel under 2 miles and a further 20% would travel more than 30 miles.

Table Nine: Distance prepared to travel to attend a live music event

Base = all respondents (355)

	%
Under 2 miles	19
2-5 miles	20
6-10 miles	17
11-15 miles	10
16-30 miles	15
More than 30 miles	20

Type of Venue Preferred

Respondents were asked to indicate from a pre-coded list the type of venue they would prefer to attend to see a live music event. 61% of respondents would prefer a purpose built arena and 30% stated a town hall or concert hall. Younger respondents aged 16-20 years old were more likely than average to mention a purpose built arena, whereas older respondents aged 26 years old and over prefer a more intimate venue such as a local pub or concert hall.

Table Ten: Preference for type of venue

Base = all respondents (355)

	%
Purpose built arena	61
Town hall or concert hall	30
Local pub	25
Clubs	30
Open air festivals	2
Other	1

Respondents gave the following reasons for their stated preference for type of venue.

Table Eleven: Reasons for preference

Base = all respondents (355)

	Total	Arena	Town hall	Local pub	Clubs	Open air
Base =	355	218	105	90	105	7
	%	%	%	%	%	%
Better atmosphere	38	38	25	22	32	57
Larger venue	12	17	4	0	4	0
Attracts big names/well known	8	13	3	2	2	14
Local/easy to get to	8	5	13	11	9	0
More people	7	8	4	0	2	29
Better facilities	6	11	5	0	3	0
Smaller venue	5	0	12	3	4	0
Purpose built venue	5	7	4	0	0	0
Better sound quality/acoustics	5	4	4	1	2	0
More intimate/cosy	4	1	4	4	9	0
Easier to see group/get better view	4	2	5	3	7	0

Spacious/more room	4	4	2	1	2	14
Can get a drink	4	1	0	9	6	0
More safe/secure	3	5	3	1	0	0
Better lighting, special effects	3	6	3	1	3	0
Friendly	3	2	1	7	2	0
Don't know	7	11	21	21	18	0

Other responses (29%) see appendix two - tables of analysis

How Venues Can Encourage Attendance

Respondents were next asked (unprompted) how could venues encourage individuals to visit live popular music events.

Table Twelve shows that a third of respondents mentioned that venues would need to attract well-known bands in order to encourage attendance at live music events. A further third mentioned advertising as a way of encouraging attendance at venues.

Free admission charges to events would encourage 27% of respondents to attend. One in ten respondents stated a late licence would influence their decision to visit a venue and a further 11% stated that better atmosphere in venues would also be a welcome improvement.

Table Twelve: How venues could encourage you to visit (unprompted)

Base = all respondents (355)

	%
Attract well known bands	33
Special offers/promotional nights	31
Better advertising	30
Free admission charges to events	27
Improve atmosphere in venue	11
Late license	10
Improve programme of events	9
Having more local bands	8
Cleaner venue	3
Arrange transportation	3
Cheaper admission charges	2
Others	11

SOURCES OF INFORMATION

In order to look at the most cost effective media for marketing live popular music events, Generator North East wished to look at how respondents find out what is going on in their area (all events, not just music) and where they would expect to find out about live popular music events in their area.

Main Sources of Information About What's On

Respondents were first of all asked (unprompted) what was the main source of information used to find out about entertainment in general.

Word of mouth and advertising in newspapers were the two main sources of information. Respondents aged 16-20 years old were more likely than average to mention word of mouth whereas respondents aged 26 years old and over were more likely than average to mention newspaper advertisements.

Radio was most likely to be mentioned, as the main source of information, by respondents aged 21-25 years old.

Posters, leaflets and flyers were of most importance to younger respondents (aged 16-20

years old).

When prompted with a list of sources of information, respondents mentioned posters, leaflets, fliers (mentioned by 53% of respondents) as an additional source of information, radio was mentioned by 45% of respondents followed by word of mouth mentioned by 52% of respondents. Listings in newspapers rose from 6%, when mentioned unprompted, to 17% when prompted.

Table Thirteen: Main sources of information about what is going on

Base = all respondents (355)

	% unprompted	% prompted	% total
Word of mouth	27	25	52
Advertising in newspapers	25	21	46
Posters, leaflets, fliers etc	17	36	53
Radio	16	28	45
Listings in newspapers	6	10	17
Internet	3	5	8
Television	2	14	16
Magazines with entertainment/activities listings	1	11	12
Teletext	1	9	10
Other	1	1	2
Nothing else	n/a	5	n/a
Don't know	0	1	0

Sources of Information Used to Find out About Live Music Events

Respondents mentioned a variety of newspapers and radio stations, which they use to find out about live popular music in their area.

These were:

63% of respondents living in Newcastle, Blyth and Sunderland mentioned the *Evening Chronicle*.

2% of respondents living in Durham mention the *Durham Advertiser*.

3% of respondents living in Sunderland mentioned the *Sunderland Echo*.

43% of respondents living in Middlesbrough, Redcar and Stockton mentioned the *Evening Gazette* newspaper.

21% of respondents living in Cumbria mentioned the *Cumberland News*,

18% mentioned the *Evening News and Star*, and

the *Cumberland and Westmoreland Herald* was mentioned by 15% of respondents living in Cumbria.

Galaxy radio was the main radio station mentioned by respondents across all areas. In total 20% of respondents mentioned *Galaxy radio*.

TFM was mentioned by 39% of respondents living in Middlesbrough, Redcar and Stockton.

CFM was mentioned by 49% of respondents living in Cumbria

Metro FM was mentioned by 13% of respondents living in Newcastle, Blyth, Durham and Sunderland.

Word of mouth was mentioned by a quarter of respondents as were leaflets and flyers.

Posters were mentioned by 17% of respondents as a good way of finding out about live music events locally.

Table Fourteen: Sources of information used locally, to find out about live music events (unprompted)

Base = all respondents (355)

	%
Local newspapers	54
Radio	47
Word of mouth	26
Leaflets/fliers	26
Posters	17
Listings in magazines	6
TV	2

Type of Information Required To Encourage Attendance

The final question asked respondents (unprompted) what type of information about live music performances would be of most interest.

Style of music and ticket prices were the two most important pieces of information required by respondents, followed by location of venue and timing of events.

Table Fifteen: Type of information about live music performances most interested

Base = all respondents (355)

	%
Style of music eg. rock, pop, indie etc	66
Ticket prices	65
Location of venue	64
Timing of event	44
Description of band	29
Endorsements	3
Others	6
Don't know	1

CONCLUSIONS

- The results show a high level of interest in attending live music events, particularly amongst respondents in Middlesbrough, Redcar/Stockton and Durham. Pop music and dance are the two main types of music events that respondents are interested in. Indie music appeals to all age groups whereas pop is predominately of interest to young people aged 16-20 years old. Rock music has a stronger appeal amongst those aged 26 years old and over.

- The main barrier to attending a live music performance is that live gigs are perceived as being too expensive. Distance to travel to events was also considered to be a barrier to attendance, particularly for residents in Cumbria, Sunderland and Middlesbrough. In addition, lack of awareness of live music events also led to non-attendance amongst respondents who were interested in live music performances.

- The main reason for giving a poor rating of live bands was largely due to lack of appeal for the style of music, lack of variety of bands, poor quality and lack of professionalism amongst local bands.

- Respondents are looking for value for money when attending live music performances. Cheaper admission price, better variety of bands and better choice of venue were the three most important factors, which would motivate non-attendees to attend a live music event.

- Venues could also encourage attendance at events by attracting well known bands, providing promotional evenings, more effective advertising and free admission.
- Word of mouth and posters, leaflets and flyers are the two main sources of information used by young people (aged 16-20 years old) to find out what is on in their area. Older respondents aged 26 years old and over tended to refer to the newspapers for information about what's on whereas respondents aged 21-25 years old were more likely than average to listen to the radio for information.
- Information about live bands should include the style of music, ticket prices, location of venue, and to a lesser extent the timing of event.
- The Internet was not considered to be a main source of information regarding what is on locally.
- Local newspapers and local radio stations were the two mediums used by respondents to find out about live music events.

APPENDIX ONE

QUESTIONNAIRE: NON-ATTENDEES

Name of respondent Telephone

Address.....

Post code

I declare that this interview was undertaken according to the rules of the Market Research Society.

SignedDate

Name of interviewer

Classification

SHOW CARD A

Gender:	Age:	
Female	1 16-20 years old	1
Male	2 21-25 years old	2
	26-30 years old	3
	31-35 years old	4
No of children under 16 in household:	Occupation:	
None	Employed	1
One	1 Unemployed	2
Two	2 Caring for home/family	3
Three	3 Student	4
More than three	4 Self employed/freelance	5
	Other	x

QA Can you tell me if you live or work in the following locations?

Newcastle City Centre 1
 Sandyford/Heaton/Jesmond 2
 Blyth 3
 Carlisle 4
 Barrow 5
 Kendal 6
 Middlesborough City Centre 7
 Redcar/Stockton 8
 Durham 9
 Sunderland 10

Good morning/afternoon, my name is from Research International, an independent market research company. I'm asking people in the area about their views on live popular music.

SHOW CARD B

Q1 Have you attended a live popular music event in the past two years?

Yes 1 CLOSE

No 2 ASK Q2

Q2 How interested are you in attending a live popular music event in the future?

Very interested 1 ASK Q3

Quite interested 2 ASK Q3

Neither interested nor uninterested 3 ASK Q3

Quite uninterested 4 ASK Q3

Very uninterested 5 CLOSE

Don't know X ASK Q3

Q3 Which of the following types of music would you be most likely to go to see in the future? PROBE FULLY

Pop 1

Rock 8

Indie 2

Dance 9

Reggae 3

R 'n' Blues 10

Soul 4

Metal 11

Cajun 5

Hip-Hop 12

Folk 6

Punk 13

World 7

Other (please specify) X

Q4 Why do you not currently/no longer attend popular music events? (DO NOT PROMPT)

Live music performances are too expensive 1

Too far to travel to see live music gigs 2

Not interested in seeing local bands 3

Don't know what is on 4

Admission charges are too high at local venues 5

Local bands are not value for money 6

National touring bands are too expensive 7

Lack of child care 8

Little variety of local bands 9

Poor selection of venues 10

Other (Please specify) X

Q5 How often do you purchase CDs/cassette tapes/DVDs or other music related products? 2-3 times a month or more often 1

Once a month 2

Once every 2-3 months 3

Occasionally 4

Never 5

Q6 Have you visited any local venues to see a live popular music event in the past? Yes 1 ASK Q7 No 2 GO TO Q8

Q7 Can you tell me the names of 3 venues that you visited in the past to see a live popular music event?

1.....

2.....

3.....

Q8 How do you rate the bands that perform in your area?

I AM INTERESTED IN YOUR ANSWER EVEN IF YOU HAVE NEVER SEEN A BAND PERFORMING LIVE WITHIN TWO YEARS

Excellent 1

Good 2

Average 3

Poor 4

Very poor 5

Not seen any bands x

Q8a Why do you say that? PROBE FULLY

There is not enough variety of bands 1

The local bands are really good 2

The style of music does not appeal to me 3

I prefer to watch touring bands 4

The quality of the bands are not good 5

Bands are not professional enough 6

Not much choice of bands 7

Not seen any bands x

Q9 What factors would encourage you to attend a live gig? DO NOT PROMPT

Q9a Which of the following factors would encourage you to attend a live gig? PROBE FULLY READ OUT LIST

Q7 Q7a

More innovative bands

1 1

Better choice of venues	2	2
Cheaper admission charges	3	3
Cheaper food/drinks	4	4
Better atmosphere in local venues	5	5
More advertising	6	6
Better variety of bands	7	7
Improved timing of gigs	8	8
Better transportation links	9	9
More different styles of music	10	10
Special offers on tickets/promotional nights	11	11
Other (please specify)	x	x

SHOWCARD C

Q10 How far are you prepared to travel to attend a live music gig by (a) a local band or (b) a national touring band? DO NOT PROMPT

	Local band	Touring band
Under 2 miles	1	1
2-5 miles	2	2
6-10 miles	3	3
11-15 miles	4	4
16-30 miles	5	5
More than 30 miles	6	6

Q11 Which of the following types of venues would you, prefer to visit to see a live music performance?

READ OUT LIST

- Purpose built arena eg. Telewest Arena 1
- Town hall or concert hall 2
- Local pub 3
- Clubs 4
- Other (please specify)

Q11a Why do you prefer this type of venue?

DO NOT PROMPT

.....

.....

.....

Q12 In your opinion, how could a venue encourage you to visit? (DO NOT PROMPT)

Better advertising	1
Late license	2
Cleaner venue	3
Improve atmosphere in venue	4
Free admission charges to events	6
Having more local bands	7
Improve programme of events	8
Special offers/promotional nights	9
Attract well known bands	10
Other (please specify)	X

MARKETING

SHOW CARD D

Q13 What is the main source of information that you use to find out what's going on in your area?

ONE ANSWER ONLY

SHOW CARD E

Q13a What other sources do you use to find out what entertainment is going on?

MULTICODE POSSIBLE

	Q12	Q12a
	Main source	Other sources
Word of mouth (friends/family)	1	1
Posters, leaflets, fliers, etc	2	2
Advertising in newspapers	3	3
Listings in newspapers	4	4
Magazines with entertainment/activity listings	5	5
Internet	6	6
Radio	7	7
Teletext	8	8
Television	9	9
Other PLEASE SPECIFY	x	x

Q14 Where would you expect to find out about live popular music events in your area?

DO NOT PROMPT

Local newspaper (please specify which newspaper) 1

Radio (please specify which station) 2

Listings magazine 3

Word of mouth 4

Leaflets/flyers 5

Posters 6

Other (please specify)

Q15 What information about live music performances are you interested in?

DO NOT PROMPT PROBE FULLY

Timing of event 1

Style of music (eg. indie, rock, pop etc) 2

Ticket prices 3

Description of the band 4

Location of venue 5

Endorsements 6

Other (Please specify) x

THANK INTERVIEWEE AND CLOSE INTERVIEW