The Self-Service Venue

Understanding cultural audience willingness to embrace self-service technology as part of the venue experience

Katy Raines & Flo Carr – Indigo Ltd
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POINT ONE

Introduction

Following their collaboration on the Act Green research in 2022, Indigo and pointOne partnered again in March 2023 to deliver a piece of research into audience attitudes towards the use of self-service technology in cultural venues.

This project was an Indigo Share: Hot Topic, research which responds to a challenge being faced by the sector, and builds on Indigo's series of major nationwide surveys into cultural audience confidence levels during Covid.

As tech suppliers to the cultural sector, pointOne wanted to centre the audience view when it comes to use of technology. pointOne's sponsorship of The Self-Service Venue enabled the research to be offered free to cultural organisations in the UK.

Methodology

Cultural organisations in the UK, including theatres, arts centres, festivals, touring companies, museums and galleries, were invited to participate in The Self-Service Venue research. The project was free for cultural organisations in the UK to take part.

Organisations were each provided with a unique link to send out to a recommended sample of around 3,000-5,000 previous attenders. They were provided with a link to see the results from their own organisation in real time, and the results from all organisations were then aggregated to form the baseline data set.

The survey ran from 13 February to 6 March 2023 and during that three week period, 7,228 responses were gathered through 28 cultural organisations.

Participating organisations

Anvil Arts
Birmingham Hippodrome
Blackpool Grand Theatre
Byre Theatre, University of St Andrews
Edinburgh International Festival
Farnham Maltings
Floral Pavilion Theatre Conference Centre
Hall for Cornwall
HOME
Hull Theatres - Hull New Theatre and Hull City Hall
Leeds Heritage Theatres
Little Angel Theatre
Middlesbrough Theatre
Middlesbrough Town Hall
Play to the Crowd
Royal Shakespeare Company
Shakespeare's Globe
The Courtyard
The Grand Opera House Belfast
The Lowry Centre
The MAC
The Market Place Theatre & Arts Centre, Armagh
The Old Town Hall
Theatr Brycheiniog
Theatre Severn
Wales Millennium Centre
Watermill Theatre
Worthing Theatres and Museum

Introduction from Indigo

Katy Raines
Founder & CEO

Our Indigo Share: Hot Topics aim to identify challenges or opportunities in the sector and centre the views of audiences so that cultural organisations can make informed decisions with good customer intelligence.

Over the last couple of years, we've seen the growth of self-service options in the hospitality industry, accelerated by Covid and in response to recruitment challenges in that sector. We wanted to find out what place they have in in cultural venues and how audiences would respond if they were introduced further. This research takes a wide definition of 'self-service', encompassing access to information and tickets, as well as food and drink, and compares how people behave in cultural venues compared to other areas of life.

It is not Indigo's role to tell you how to run your venues, or whether introducing such technology is the right option for you, but we hope this insight will help you make more confident decisions, whatever you choose to do.

Introduction from pointOne

Steven Rolfe

Founder & CEO

The Self-Service Venue Report is a great example of how we can better understand cultural audiences and how their input can drive key opportunities for growth and secondary spend within cultural venues.

It is clear that audiences are becoming increasingly more familiar with a range of different technologies, using them in a wide variety of sectors. Their willingness to adapt to these technological changes means cultural venues can create a seamless 'customer' experience that can be tailored though the use of e-tickets, QR codes, self-service kiosks and apps.

As tech suppliers to the cultural sector, we are always looking to improve the customer experience by leveraging our experience and innovative thinking.

We hope this research gives organisations some key points to take away, to help develop, utilise and increase the customer journey within their venues.

The Self-Service Venue: Research findings

Survey overview

Responses were collected from cultural audiences during a three week period in February and March 2023.

28 participating organisations sent out the survey to a segment of their databases. Cultural organisations could see their own results from their audiences in real time, while contributing to the benchmark data set we're going to look at today.

The organisations were predominantly theatres, arts centres and concert halls. Three quarters were in England, with organisations from Northern Ireland, Scotland and Wales also represented. In total there were 7,228 complete responses from audience members.

RESPONSES COLLECTED

13 Feb – 6 Mar 2023

PARTICIPATING ORGANISATIONS

28

MAJORITY THEATRES, ARTS CENTRES & CONCERT HALLS

LOCATION

75% ENGLAND
11% NORTHERN IRELAND
7% SCOTLAND
7% WALES

AUDIENCE RESPONSES

7,228

Respondent profile

The majority of respondents are aged 55 or over and only 8% under 35.

18% of respondents had children living at home and 10% identify as D/deaf, disabled or living with a long term health condition which limits their day to day activity.

When asked how frequently respondents attend cultural events, more than a third said they go to something at least once a month.

AGE
8% - UNDER 35
32% - 35 TO 54
59% - 55 OR OVER

CHILDREN LIVING AT HOME
18%

IDENTIFY AS DISABLED
10%

FREQUENCY
34% AT LEAST ONCE A MONTH

Section 1: Understanding different cultural audience segments

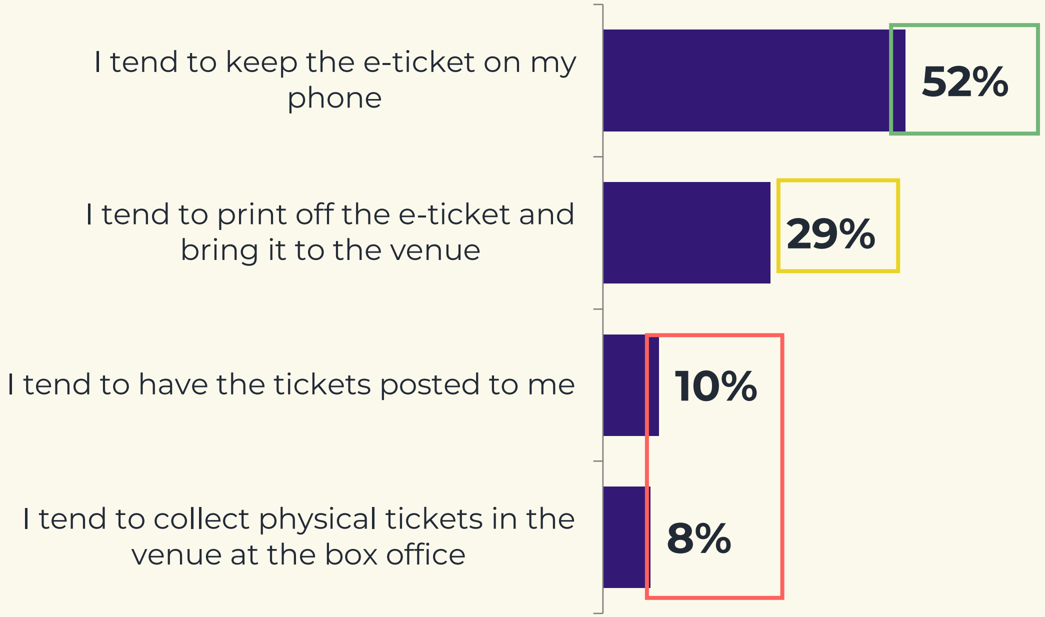
Are there different types of cultural audiences when it comes to self-service technology?

Segmenting our respondents

Overall, cultural audiences reported high levels of confidence using digital and self-service technology. From booking something with a smartphone to scanning QR codes, **97%** reported using self-service technology in their day to day lives. Within that though, there is a range of levels of confidence and self-service technology usage.

One of the first questions we asked audiences was for their ticketing preference, giving a range of options from more digitally confident (e-tickets) to less digitally confident (collecting physical tickets or having them posted).

What is your preference for ticket delivery/collection and using the ticket at the venue?
(Select the one which best fits what you do)
n = 7,045



We grouped audiences based on their responses to this question:

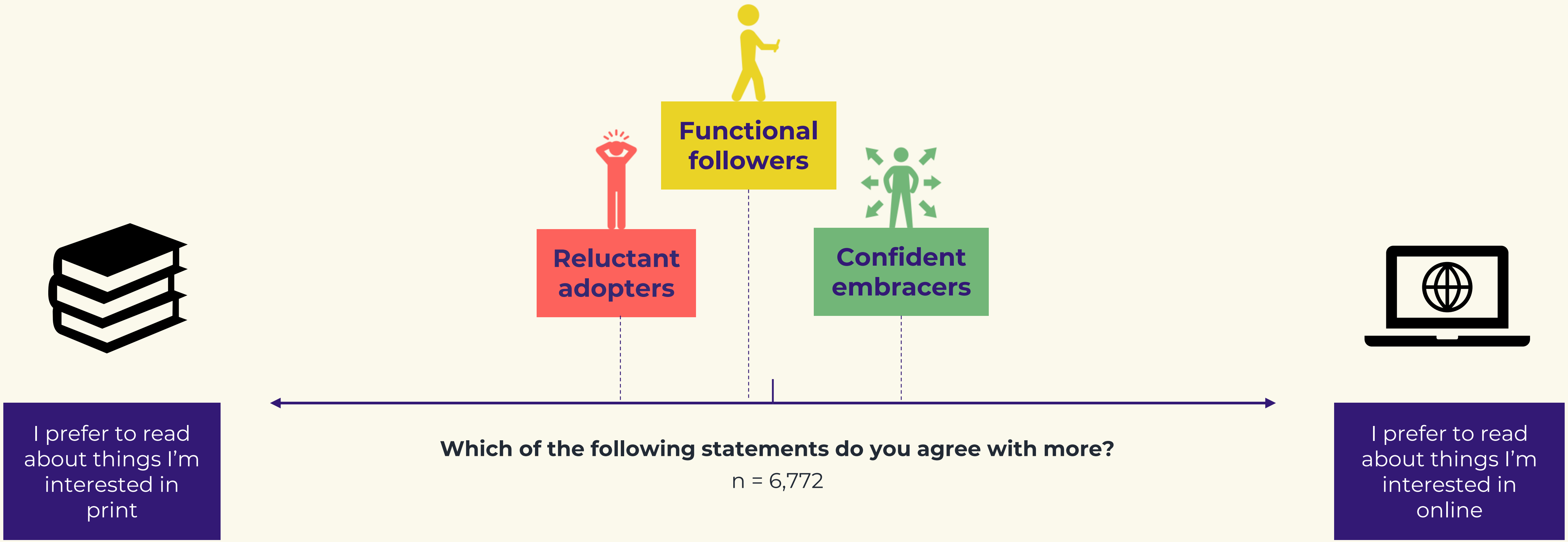
- **CONFIDENT EMBRACERS: 52%** - I tend to keep the e-ticket on my phone
- **FUNCTIONAL FOLLOWERS: 29%** - I tend to print off the e-ticket and bring it to the venue
- **RELUCTANT ADOPTERS: 18%** - I tend to have the tickets posted to me / I tend to collect physical tickets in the venue at the box office

This created a segmentation which could be replicated by cultural organisations in their ticketing system.

We looked at the results of the survey in these three groups to build up a picture of these different audience segments, starting with a series of preference questions.

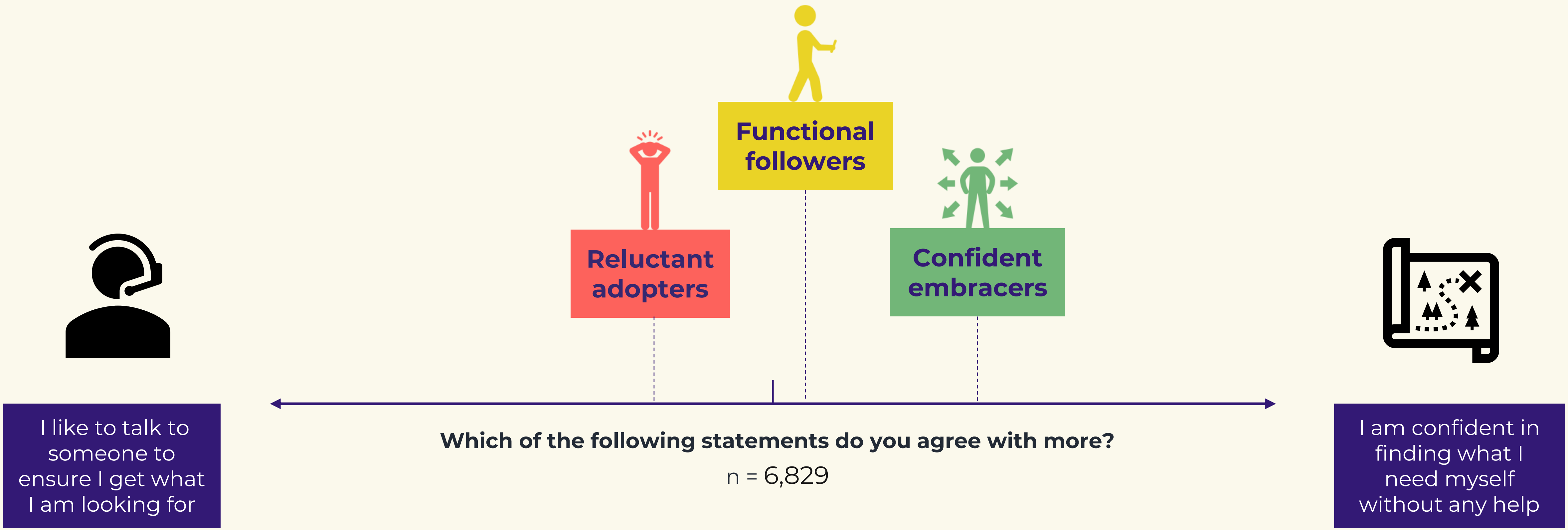
Segment preferences: Print vs online

We asked all our respondents a series of questions which required them to indicate where they fell on a scale between two options. The first asked them to say whether they preferred to read about things they were interested in in print or online, to get a sense of how much people were using their own electronic devices for consuming information. **Confident embracers** were more likely to read about things in print, **functional followers** were fairly neutral but slightly more likely to prefer print, while **reluctant adopters** were more likely to read things in print.



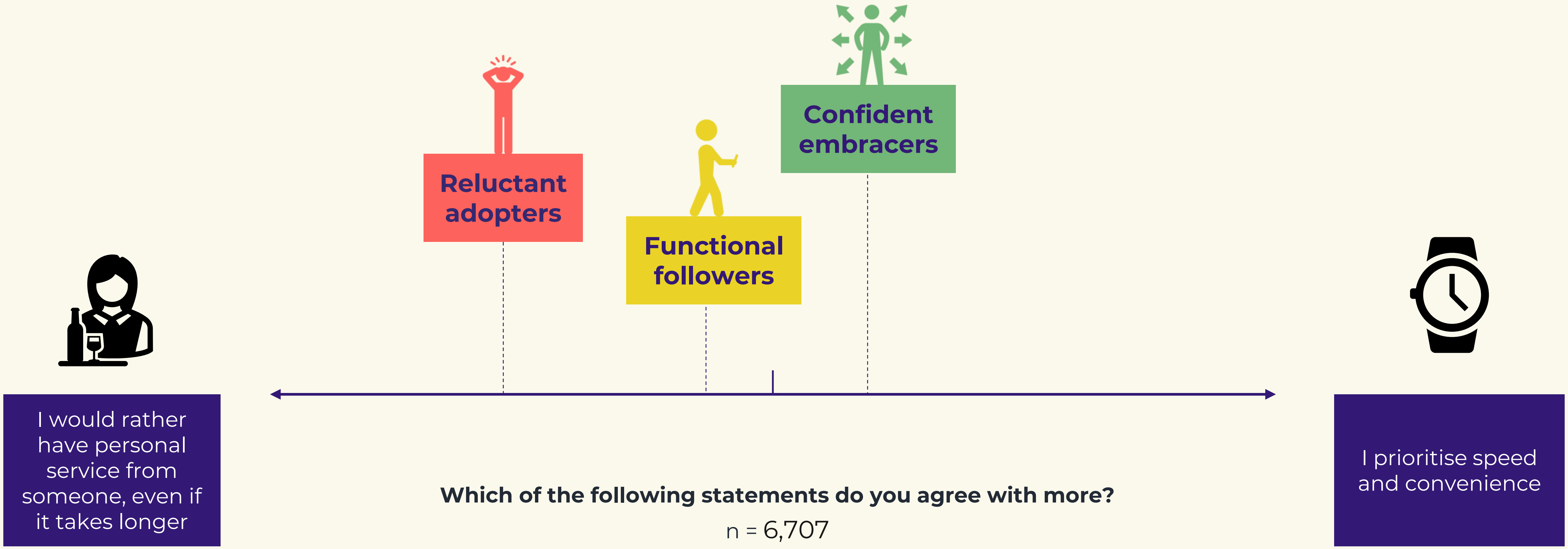
Segment preferences: Talking to someone vs figuring it out

When asked if they would prefer to talk to someone to ensure they get what they are looking for, or feel confident finding what they need without any help, the **confident embracers** were, unsurprisingly, much more confident in their own abilities. **Functional followers** overall tipped towards the right as well, while the **reluctant adopters** were more likely to want to talk to someone.



Segment preferences: Personal service vs speed and convenience

Similarly, when asked about whether they prioritise speed and convenience or a personal service, the **confident embracers** are more likely to prioritise speed and convenience, while the other two groups value that personal service.

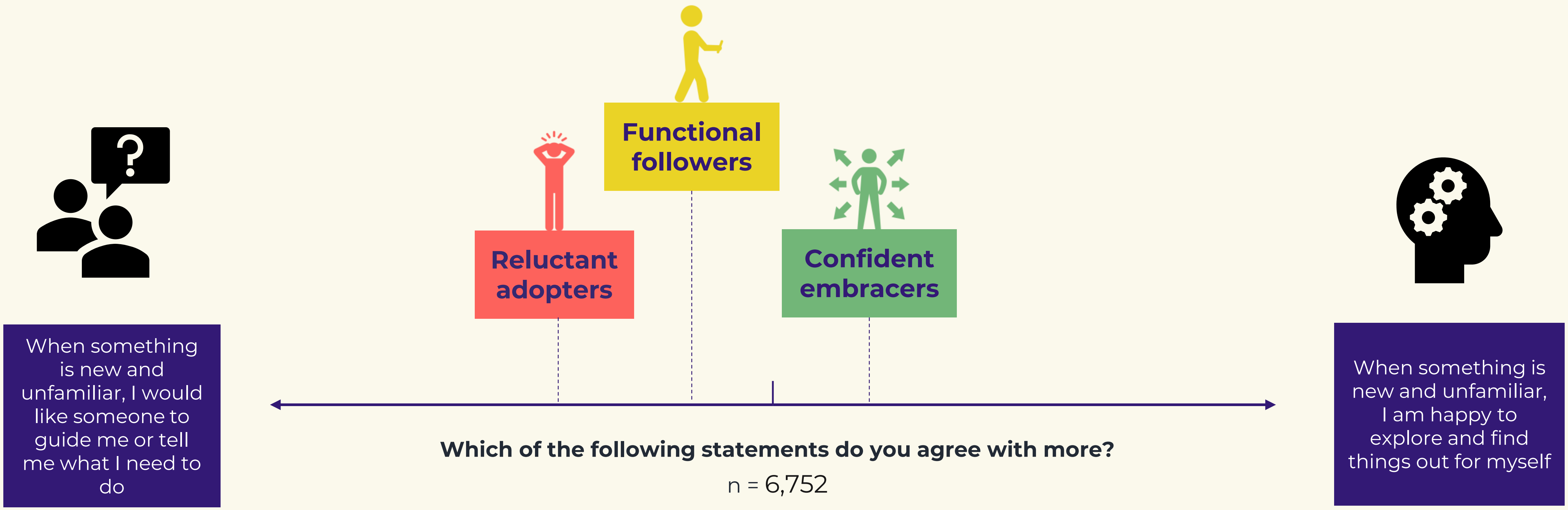


Which of the following statements do you agree with more?

n = 6,707

Segment preferences: Navigating unfamiliar territory

Finally, when asked about how confident they are navigating unfamiliar territory, only the confident embracers were happy to explore and find things out for themselves. The other two groups were more likely to say they wanted to someone to guide them or tell them what they needed to do.



Profiling our audience segments

Bringing together their responses to the preference questions and with their responses to the sections about their demographics and cultural attendance, we have been able to build a picture of our three segments and how they differ from one another.

Confident embracers

52%

"I tend to keep the e-ticket on my phone"

Demographics: They are slightly younger and more likely to have children under 16 living at home.

Cultural attendance: They are more interested in trying unfamiliar artforms, and value the social aspects of cultural experiences.

Digital users: They are self-sufficient and confident users of digital and tech. They value speed and convenience and are confident finding out information.

Functional followers

29%

"I tend to print off the e-ticket and bring it to the venue"

Demographics: Older than the confident embracers.

Cultural attendance: They are slightly more 'traditional' in their artistic tastes.

Digital users: Fairly confident navigating self-service technology when they have had to pick it up, but may still choose a personal service if available.

Reluctant adopters

18%

"I tend to have the tickets posted to me / collect physical tickets in the venue at the box office"

Demographics: Younger than the functional followers, and a higher proportion identify as disabled.

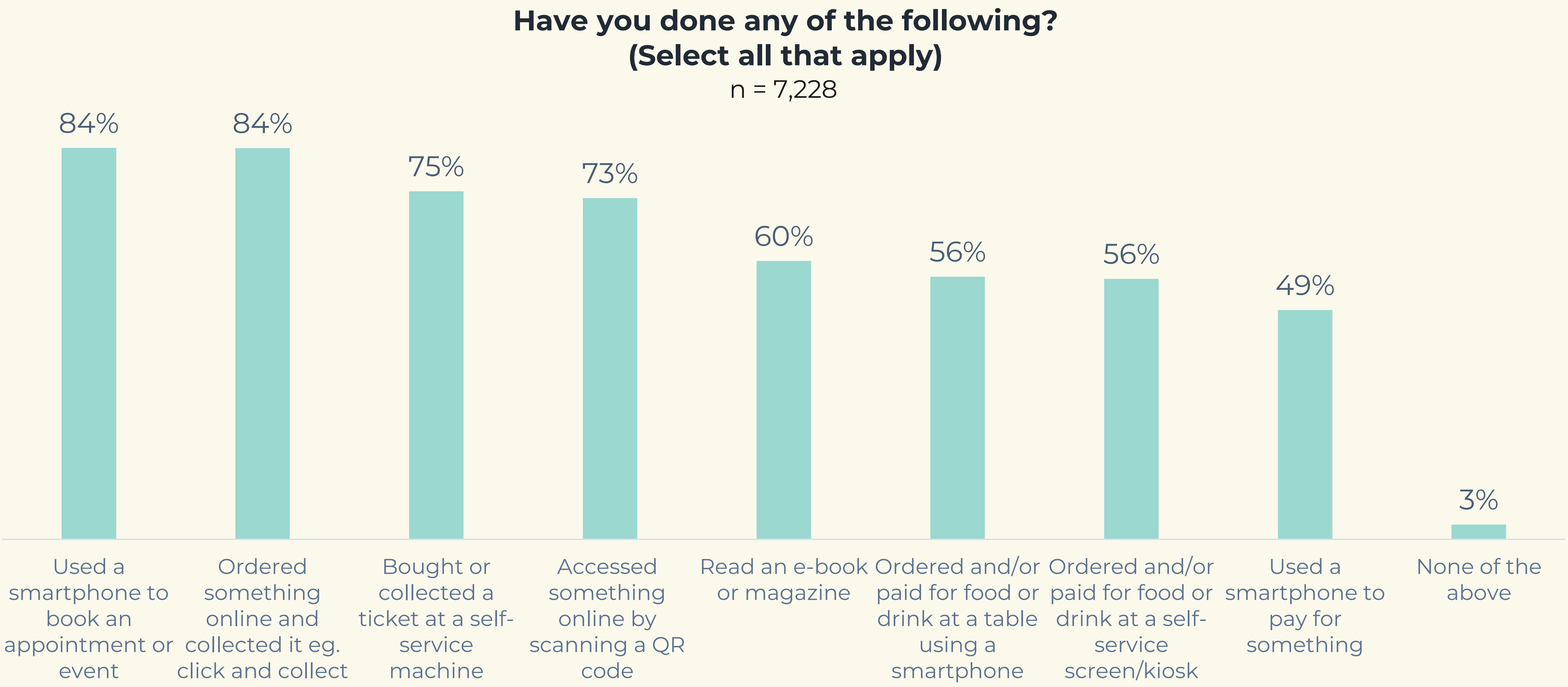
Cultural attendance: Slightly less frequent attenders.

Digital users: This group are the least likely to use self-service tech and value personal interactions more.

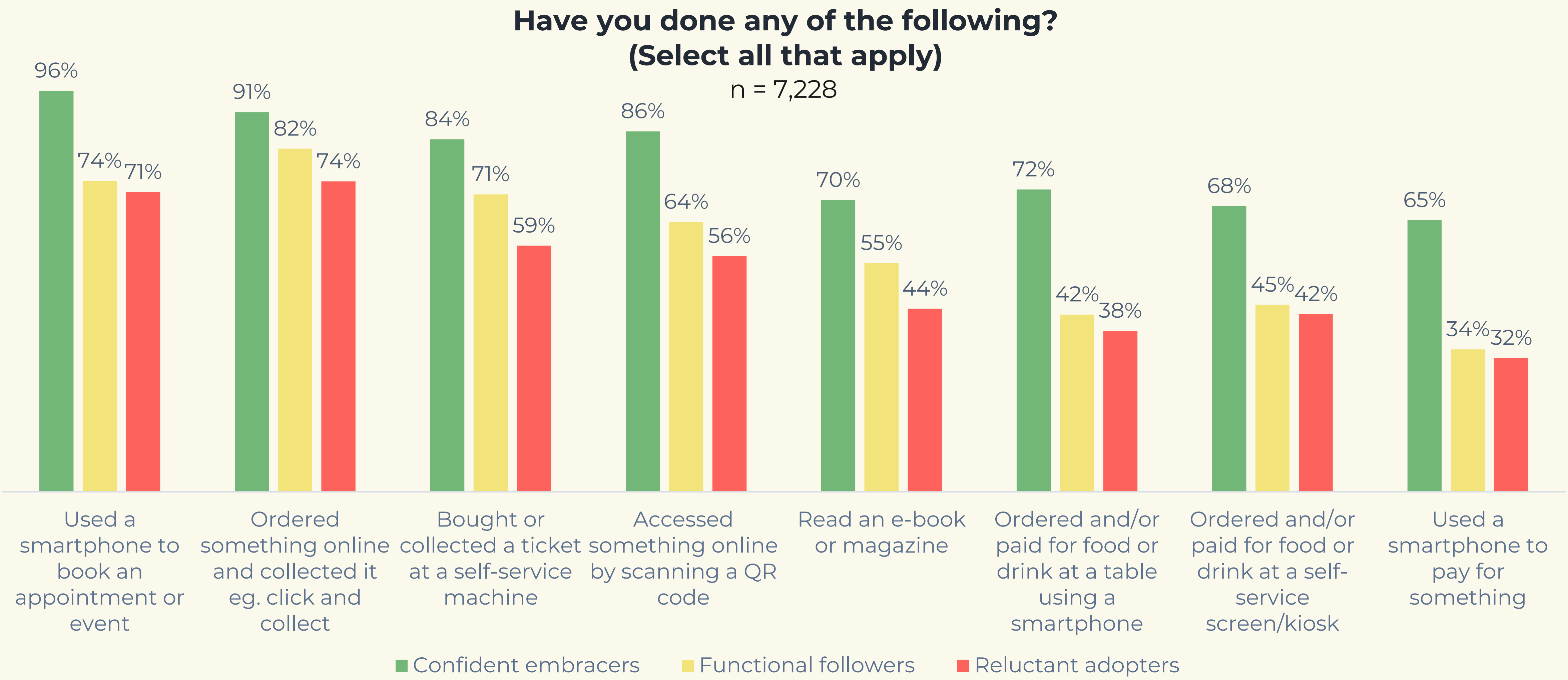
Section 2: Cultural audiences and self-service technology generally

How much and in what ways are cultural audiences already using self-service technology in their day to day lives?

Cultural audiences are using self-service technology in many areas of their day to day lives



This varies by the three audience segments



Using self-service technology in different contexts

There are three key types of self-service technology. **At home use** might include ordering online for delivery or click and collect or booking appointments or events. There is plenty of time to do these, without a queue of people behind you and the comfort of technology you know. The second type **replaces a transaction-led experience** for example buying or collecting tickets from a machine. This tends to be familiar technology which replaces what would be a fairly transactional relationship with someone. The most advanced type **replaces a service-led experience**, for example ordering food or drinks, or paying the bill at a restaurant from your smartphone. It might require you to download an app or scan something on your phone. It is not usually the only option, but tends to be the quickest.

At home use requires fairly low levels of skill and confidence, whereas being able to adapt to whatever tech a particular restaurant is using and know that you'll be able to navigate it confidently requires higher levels of skill and confidence. When we looked at our three groups, although they are doing all three of these to varying degrees, the **reluctant adopters** are most happy with the at home use, but start to drop down to lower levels of experience for the next two. **Functional followers** are happy replacing the -ed experiences with tech, but probably still choose a personal service in a hospitality environment. Then finally the majority of **confident embracers** are happily doing all three.

At home use

To replace a transaction-led experience

To replace a service-led experience

Lower levels of skill and confidence required → **Reluctant adopters** → **Functional followers** → **Confident embracers** → Higher levels of skill and confidence required

Section 3: Cultural audiences and self-service technology in cultural venues

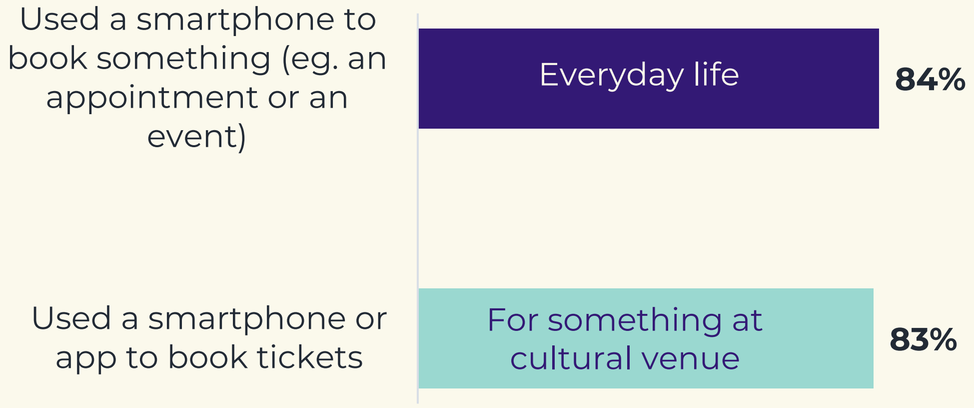
How does audience behaviour in cultural venues compare to what they are doing generally?

Comparing self-service use in cultural venues with day to day

Respondents were given a series of self-service options related to booking for or being at a cultural venue, and asked which of them they had done. Their responses were then compared with their level of self-service use in everyday life to show where self-service technology is being used at the same levels as in other areas, and where there might be opportunities to use it more.

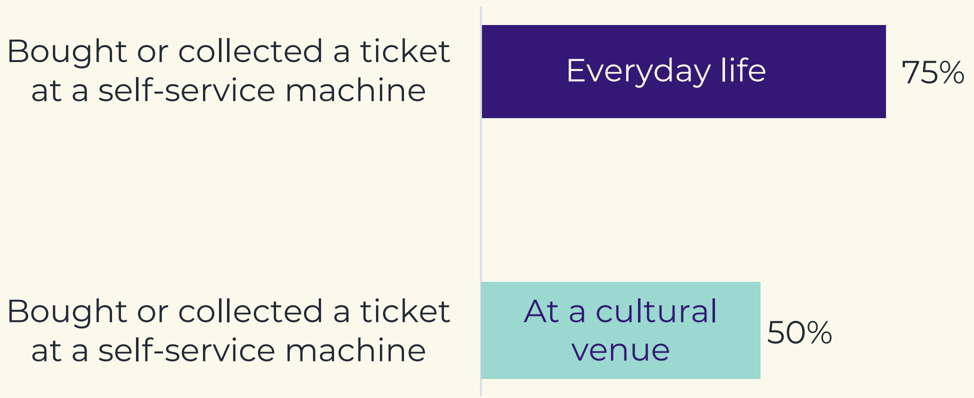
Using smartphones for booking

Which of the following have you done?



Buying or collecting with self-service machines

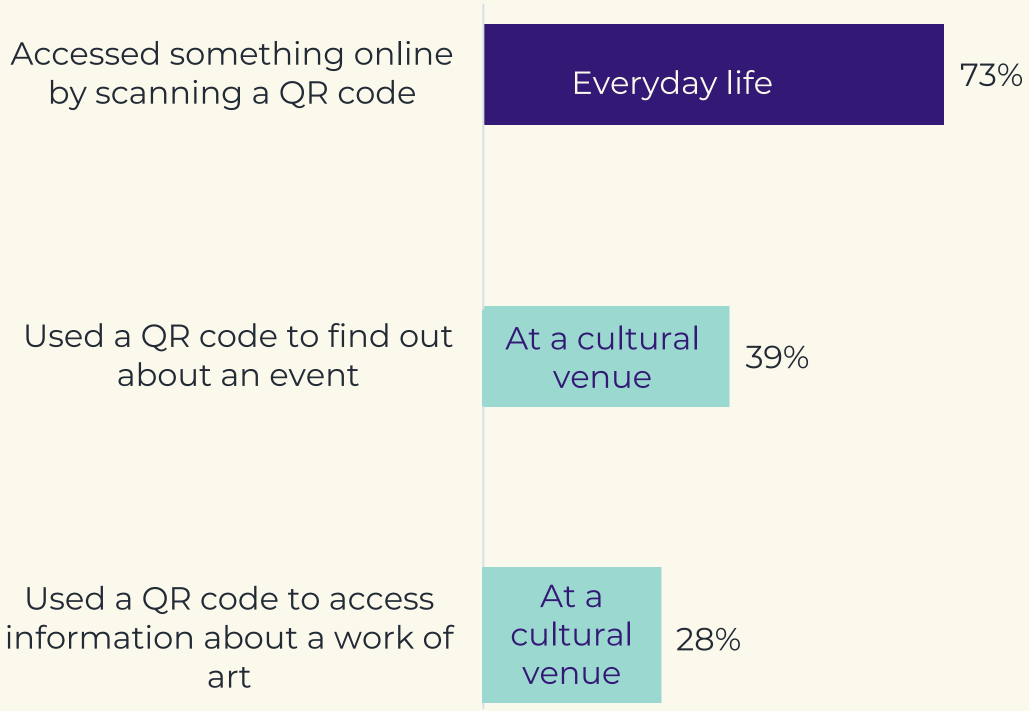
Which of the following have you done?



Comparing self-service use in cultural venues with day to day

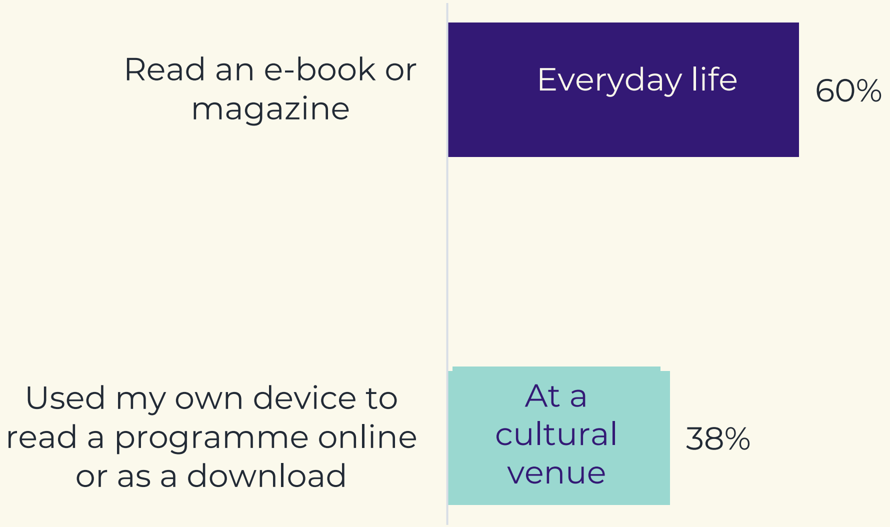
Using QR codes

Which of the following have you done?



Reading on an electronic device

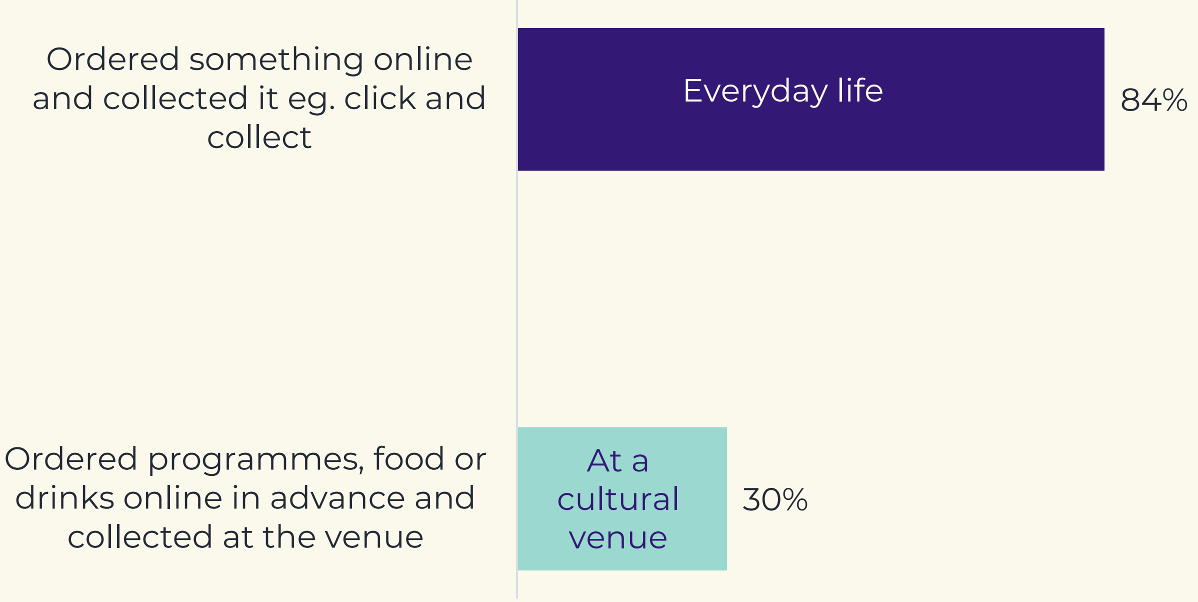
Which of the following have you done?



Comparing self-service use in cultural venues with day to day

Ordering with click and collect

Which of the following have you done?



Opportunities for cultural organisations

There are a number of areas where cultural audiences are using self-service technology in everyday life, but not in cultural venues. For more about possible opportunities for cultural venues to make more of self-service, see page 30-31.

Self-service in cultural venues: What do different audience segments think of it?

Consistently lower than average use

Reluctant adopters

"**I prefer to have the friendly staff at the venues** - it makes me feel more confident going out. I want to be served and greeted at the door, and directed to my event or performance,"

"I am use able to use self service options from my smart phone. But **as a severely sight impaired** person I cannot use machines e.g. to print off my ticket."

Functional followers

"Ok if it works… but if there are problems **it's a nightmare to get help**."

"I would be nervous of using them at first but **would probably get used to it** if not too complicated."

Confident embracers

Consistently higher than average use

"Self-service is quick! I often arrive to an event just in time for the start so **would rather not faff when arriving**."

"They **save time** and **guarantee that you can get what you want** at a venue (programmes, food and drink)."

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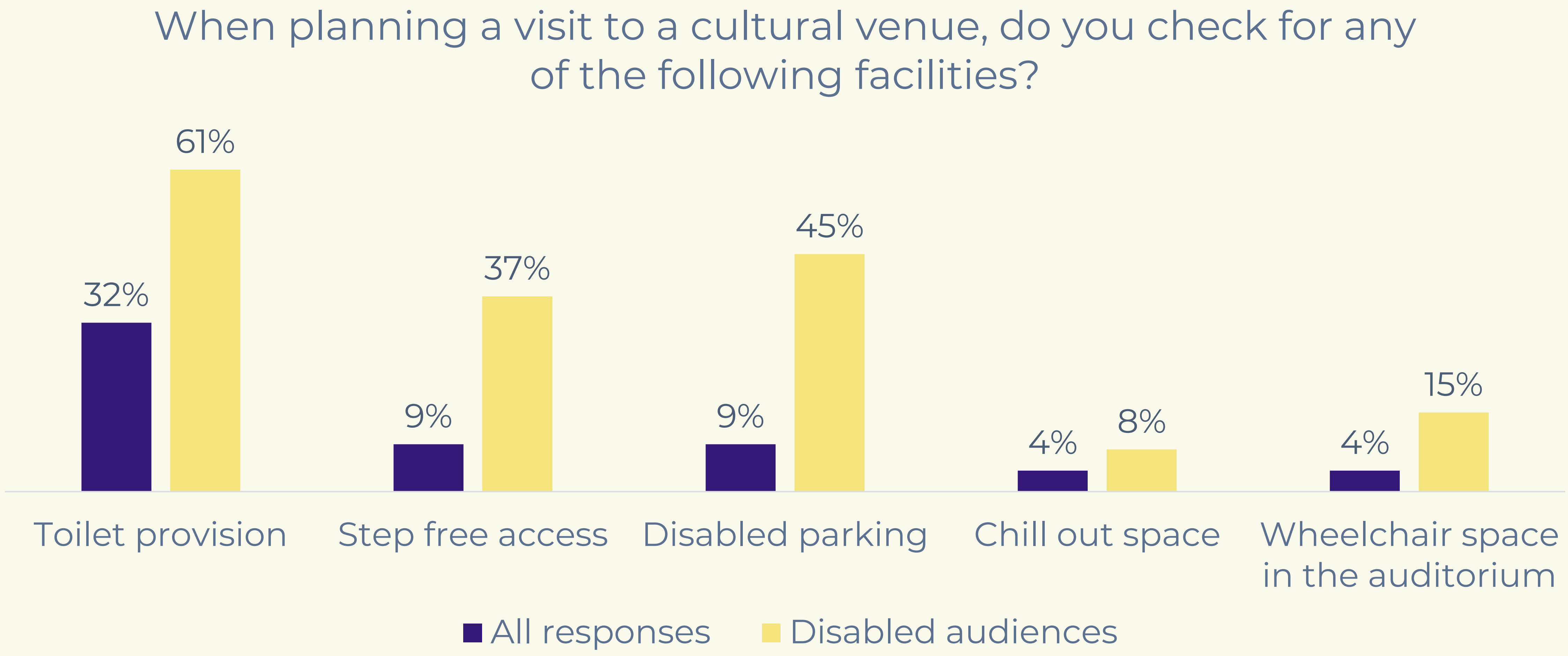
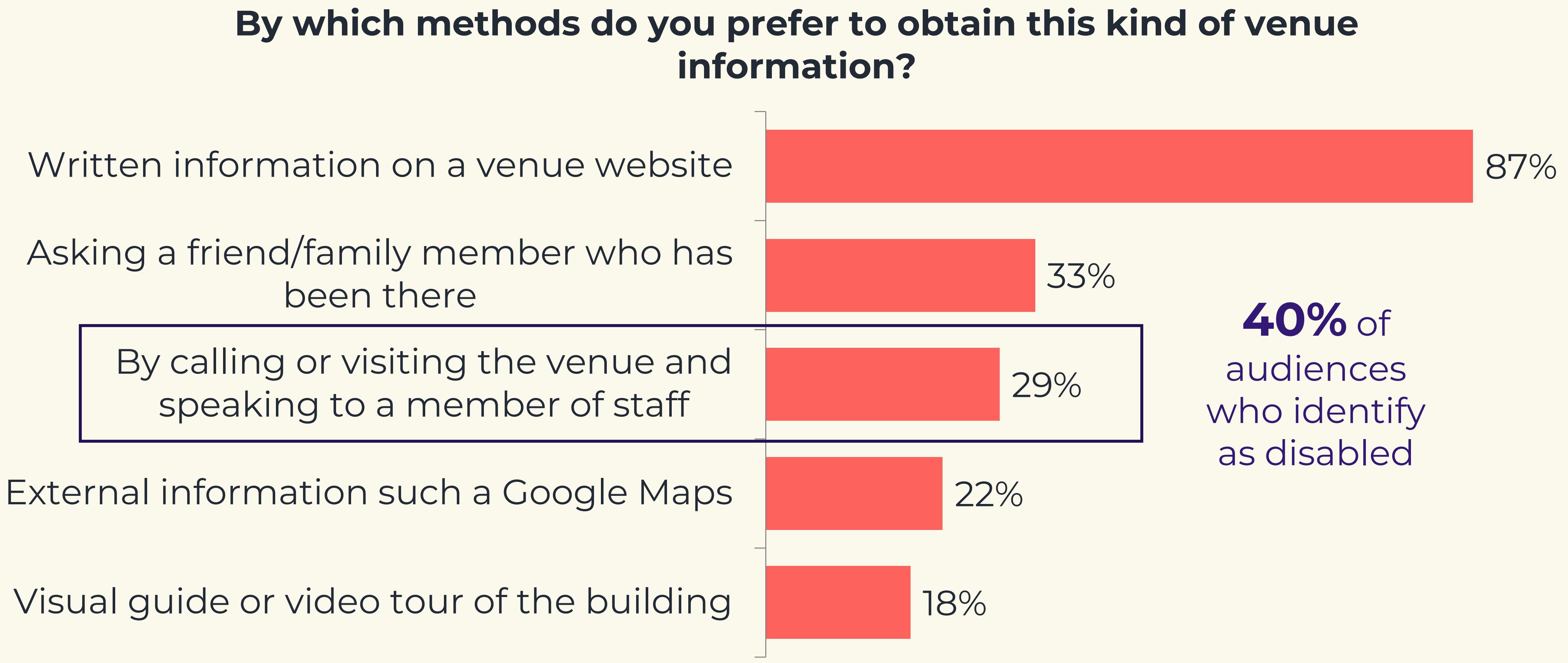
Section 4: Self-serving for information before the visit

To what extent can audiences self-serve when it comes to finding out information about the venue and how it meet their particular access needs?

40% of all audiences check for particular facilities while planning a visit



The majority of audiences are happy to self-serve for this kind of information – but a significant minority want a personal service



Section 5: Context and opportunities for cultural venues

The context

Increasing demands to drive secondary spend in challenging circumstances

Maximising secondary spend has never been more important for cultural venues.

Since Covid, organisations are facing significant challenges in the recruitment and retention of bar and catering staff, and staff costs have risen due to this decreased supply coupled with the cost of living crisis.

Audiences remain unpredictable and slow to return to pre-pandemic habits of attendance. Whilst some venues are struggling to forecast which shows will be full, others are continuing to report lower audience numbers than before Covid, with audiences less willing to spend when they are at the venue.

But customer expectations are still high when they do go out. Overall, organisations are faced with the challenge of serving more demanding customers and a pressure to increase spend per head – with fewer staff.

Myth busting: the perception of self-service as a binary choice

There is a perception that by introducing self-service elements, organisations will be alienating a significant proportion of audiences who are less ‘digitally savvy’.

The results have shown that over half of your audience are not only digitally confident, but welcome opportunities to use technology to save time and hassle. By providing options for those audience groups to self-serve, organisations can free up staff to super-serve those who need or value the human interaction.

The segmentation we have developed based on how people have their tickets delivered means that you can easily identify your reluctant adopters, and perhaps not offer them the self-service options. Instead you could ensure they get all the human-centred information they need ahead of their visit (perhaps as a printed leaflet with their tickets) to show that they will be welcomed and served by individuals.

Those opting to have their tickets digitally can be targeted with self-serve messages and opportunities to save time and remove hassle.

Technology can be an enabler

For some audiences, rather than technology being a barrier or simply a time saver, it can be an enabler.

Some neurodivergent patrons, for example, may far rather interact with technology than with a person; for people with English as a second language, being put on the spot to communicate exactly what they want at the bar, with a large queue behind them, might just put them off trying.

*“For someone like me, who has **autism**, having the option to use a machine is a stress free way to get what I want and is **much less daunting**.*

*It makes me **more likely to spend my money at a venue** and I can spend more time enjoying the art/ performance, **as opposed to feeling anxious or stressed**.”*

Five opportunities for cultural venues

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1 QR codes

76% of respondents would use a QR code to find out about an event - but only **39%** have.

The cheapest and easiest self-service technology to implement, QR codes are already familiar technology for many people.

Options to consider:

- Cut down brochures and use QR codes to direct audiences to your website, cutting print and postage costs.
- Use QR codes around the venue to give information, ensuring you can always keep it up to date.
- Use QR codes to encourage audiences to order food or drinks from a smart phone.

2 Click and collect

76% said they would order programmes, food or drinks online for collection at the venue – but only **30%** have.

'Click and collect' is a familiar term, used by many retailers in the UK.

The results suggest an opportunity for cultural organisations to adopt the term 'click and collect' in audience communications to encourage more people to pre-order for collection – and perhaps to consider what other products or types of merchandise could be sold through 'click and collect'.

3 Kiosks

85% are willing to buy or collect tickets from a kiosk and **77%** are willing to order/pay for food or drink at a kiosk.

Although many audiences are comfortable using their smartphones, for audiences who fit into the functional followers segment, kiosks may be a better option.

Offering both options allows a range of audiences with different confidence levels to self-serve in different ways, and clearly the results show that the majority of audiences would be comfortable using them both for ticketing and buying food and drinks.

Five opportunities for cultural venues

4

Printed programmes

73% of respondents would use their own device to read a programme online or as a download – but only **39%** have.

Many audiences are used to using their smartphones to access information – and nearly three quarters are willing to do this to read a programme.

It may be worth considering, however, what need the programme is fulfilling for theatre or concert audiences and then considering the most appropriate format or formats for the production.

Online alternatives (whether they are written information, video or podcasts) may enable audiences to find out more about the production, while printed programmes offer a souvenir of the event.

5

Hand-held devices

62% would use their own device to access captions / audio description – but only **9%** have. **55%** would use their own device to follow the script/musical score – but only **5%** have.

The results suggest that this is the area which is least available to audiences at the moment, with significant numbers willing to use their device to enhance their experience during the performance but very few who have.

There is innovation happening in this area already, but it is very interesting to consider how self-service technology could allow different people to experience the same performance in a different way, personalised and suited to them, their needs and their level of interest.

Final thoughts

The 'self service venue' is so much more than people buying tickets online.

It has the potential to free up your staff to super-serve those who require or prefer human interaction, enhance the customer experience, increase secondary spend and improve access.

We look forward to seeing how this technology is used in cultural venues in the future.

Get in touch

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About us

indigo

Indigo Ltd provides powerful insight and sensible consultancy for a stronger sector. Indigo's Founder and CEO Katy Raines is regarded as one of the UK's leading consultants on CRM and segmentation for the arts, and as such has developed and led research and implementation programmes for large and middle scale organizations throughout the UK. She has a particular passion for using audience data to effect change and drive an audience-led approach to marketing for any arts organisation.

Since April 2020, Indigo Ltd has tracked cultural audience sentiment during Covid-19 through a series of large-scale national audience surveys – including After the Interval, the Culture Restart Toolkit and Missing Audiences – which have been used by over 500 cultural organisations and gathered over 500,000 responses to date.

POINT ONE

Founded in 2001 by Steven Rolfe and Nick Williams, pointOne had one aim: to develop and deliver innovative EPoS solutions and tools for the hospitality sector, all backed up by outstanding support and project delivery. Over the last 20 years, the company has achieved this core objective and much more. We are now installed in over 2500 outlets.

On the back of successes within the Arts sector, pointOne founded an Arts and Culture division and now the solution includes many theatre-specific features to manage interval ordering, ticketing integration and kiosks, as well as focused learning and support for our customers. pointOne have over 50+ theatre venue customers and are growing fast, making them the go-to EPoS partner for the Arts Sector.