

<b>Committee(s)</b>	<b>Dated:</b>
Barbican Centre Board	<b>24 January 2024</b>
<b>Subject: Barbican Centre – Marketing Annual Strategic Update</b>	<b>Public</b>
<b>Which outcomes in the City Corporation’s Corporate Plan does this proposal aim to impact directly?</b>	<b>3, 7, 8, 9, 10</b>
<b>Does this proposal require extra revenue and/or capital spending?</b>	<b>N</b>
<b>If so, how much?</b>	<b>n/a</b>
<b>What is the source of Funding?</b>	
<b>Has this Funding Source been agreed with the Chamberlain’s Department?</b>	<b>n/a</b>
<b>Report of: Claire Spencer, CEO Barbican Centre</b>	<b>For noting</b>
<b>Report author: Jackie Ellis, Interim Head of Marketing, Barbican Centre</b>	

### **Summary**

This report details the plans for Marketing the Barbican Centre over the next 12 months. The marketing team has for some time suffered from a lack of senior leadership and resource as a result of the Covid pandemic and associated hiring freezes. As a whole the Barbican has not effectively identified its core priorities which has had a serious impact on the marketing team who have come under increasing pressure from across the centre. Brand Marketing has been very limited with the team focused on delivering a large volume of individual artform event campaigns and therefore unable to meet the demands of promoting the overall brand.

Now that Barbican’s new vision and values, strategic framework and audience strategy has been agreed the Marketing team is in a period of renewal. An interim Head of Marketing has been appointed and a new plan is evolving for 2024 which aligns with the strategic framework and the audience strategy.

### **Recommendation**

The Board NOTE the report.

### **Main Report**

#### **Background**

The marketing team at the Barbican is responsible for promoting the full range of events that are held across the centre to the public, driving ticket sales, building the brand story of the Barbican as well as driving visitors to the variety of restaurants and bars, enhancing the membership scheme and more generally responding to the vision and strategic priorities of the organisation.

As with other UK based arts and cultural organisations, the Barbican is still in a post COVID landscape and now amidst a cost-of-living crisis. It has also undergone significant internal

change since the publication of Barbican Stories in 2021 and the hiring freeze that existed throughout the pandemic which has resulted in a passionate but relatively junior level team managed by an Acting Head of Marketing with 12 direct reports.

This has led to the team being overwhelmed by the workload associated with promoting such a large number of individual events with many competing priorities and no focussed plan. The marketing team currently have no real input into the overall programme and are expected to find audiences and drive ticket sales irrespective.

Overall, the Barbican for some time has not seen itself as a destination, but rather a series of independent venues with a variety of commercial hire activities, therefore brand marketing overall has been sporadic and ad-hoc.

The organisation has recently developed a new vision to become London's creative catalyst for arts, curiosity and enterprise. A new set of values underpin this vision, and a set of strategic goals have been articulated. Beyond selling tickets, the Barbican is focused on who it is engaging with to build new and more diverse audiences.

Now the Barbican has a new audience strategy it is important that the marketing team are structured and equipped to deliver on the strategic framework. A comprehensive marketing review was undertaken in mid-2023 and as a result reporting lines were changed from the Artistic Director to the CEO (ultimately landing with the Director for Audiences in 2024), and an interim Head of Marketing was appointed with the remit to look at the team structure and develop the brand and audience strategy.

### **Opportunities**

Three key opportunities will be the focus of much of the marketing team's focus in 2024 and will have knock on impacts on much of the work undertaken: -

1. Develop public facing brand values, USP's, positioning, personality and tone of voice that supports our vision and values and becomes the basis for how we present ourselves to audiences, staff, stakeholder and partners moving forward.
2. Develop a central brand marketing and communications plan (no silos!) tied to shared goals that allows us to plan and prioritise our marketing and communications efforts and allow more significant audience development and brand campaigns to be developed.
3. Significantly improve the organisations data maturity specifically in reference to collection and access to audience data that allow the development of more engaging marketing campaigns based on audience insight.

### **Barbican's place in the Competitive Landscape**

Our organisation faces a wide competitor profile due to the diverse and varied cross-arts programme of events. Our key competitors in the sector continue to be other major cultural institutions including Southbank Centre, however we are increasingly competing with smaller venues across the city, emerging and established, large and small. They often specialise in art forms including theatre, dance, contemporary and classical music, cinema and visual arts. When we discuss our competitors, this is typically related to ticket sales, however we also need to compete on artistic programme identity and brand individuality.

While major venues such as National Theatre, Sadler's Wells and the West End compete with our main theatre programme, The Yard in Hackney Wick for example, is a 200-seat experimental space whose eclectic events often have notable cross-over with our Pit

Theatre programme. Our classical music programme competes with cultural behemoths such as Royal Albert Hall and Royal Festival Hall, however it also sees competition from the 420-capacity King's Place in Kings Cross who are home to the OAE, London Sinfonietta and Aurora Orchestra. For more background, please refer to Appendix 2 – Detailed Competitor Review.

This mixed profile of competitors is reflected across all artforms. It therefore remains crucially important for us to communicate our unique position in the cultural landscape to audiences to remain as a destination at the forefront of their minds. Our unique strength is our ability to deliver outstanding events across artforms, iconic architecture and our strong commercial offer including food, drink and retail opportunities for our audiences to enjoy.

Over the past year, London's cultural landscape has seen a number of remarkable changes and significant developments. Among these changes:

- The reopening of iconic institutions such as the National Portrait Gallery this summer and the Museum of Childhood renamed as the Young V&A stands as a testament to the city's commitment to preserving its heritage and fostering engaging artistic and cultural experiences.
- English National Opera (ENO) have been forced to relocate to Manchester to retain their significant Arts Council funding as part of a government drive to redistribute culture funding from the capital, across the UK.
- The introduction of new venues includes the Nimax owned @SohoPlace theatre in the revitalised Tottenham Court Road area and in early 2024 Soho Theatre is set to open a major new 1,000 capacity venue in Walthamstow, dedicated to a diverse range of live performance including theatre, cabaret and comedy, less than 25 mins from Central London.

Alongside these re-openings and introductions, the city has witnessed the transformation of older cultural institutions hosting genre-breaking events that appeal to younger and more diverse audiences. This includes the vibrant *Summer Series* at Somerset House featuring artists including Young Fathers, Greentea Peng, Tinariwen and Olivia Dean. Ballroom collective Vogue Rites returned with a sold-out vogue ball in their iconic courtyard sponsored by Adidas. *Tate Lates* at Tate Modern continues to lead the way in engaging young audiences late into the evening, providing an open and engaging monthly programme of free events with live music.

Potential risks in the future are likely to come as all arts organisations continue to diversify their own artistic programmes. Our events offer needs to remain relevant, unique and aligned with the key target audiences outlined in our new Audience Strategy.

Work from artists from Global Majority backgrounds including Ballet Black and Boy Blue continue to draw in large audiences, however it's crucial that we remain in a position as a cultural catalyst where we are continuously discovering and developing new emerging talent for our stages before the artists are well known. This is of particular importance as companies including Ballet Black are moving away from being Barbican specific, establishing themselves more widely across other key competitor venues including the Linbury Theatre, Royal Opera House.

The film industry experienced a significant upheaval this year due to the SAG AFTRA strike, disrupting production schedules and impacting the cinema release slate for 2024.

It has been reported that many contemporary music venues across the UK are struggling financially. While new arenas are on the rise in various UK cities, concerns persist about the financial strain on grassroots venues and the potential for these larger arenas to dominate the scene, leading to increased concert ticket prices and potential limitations on emerging artists' opportunities.

Amidst these shifts, there's a concerted effort to nurture emerging talent particularly in the contemporary music sector. *The Great Escape* festival, slated for May 2024, is set to be a transformative music industry conference connecting professionals, drawing on collaborations with esteemed bodies like The Council of Music Makers, NTIA, BBC Introducing LIVE, and Youth Music, thus becoming a hub for industry insights and trends.

Furthermore, in the realm of art galleries, institutions like Tate announced new initiatives such as the Infinities Commission, supporting experimental and visionary works, while the ICA has adapted its opening hours from 4-11pm to better align with audience lifestyles, reflecting a commitment to accessibility and engagement.

There are other notable trends in the visual art world too. Immersive exhibition experiences are on the rise (The Van Gogh immersive experience, *Frameless* and *David Hockney: Bigger and Closer* being most notable). Recent blockbusters have been on the very safe side with no breakout group shows, including Cezanne, Marina Abramovic and Chanel. Women artists have been having a moment with various group shows (*Women in Revolt* at Tate; *Action, Gesture, Paint* at Whitechapel; *RE/SISTERS*) and key solo exhibitions (Alice Neel; Sarah Lucas at Tate; Nicole Eisenmann at Whitechapel; Marina Abramovic at Royal Academy).

Beyond London, the cultural landscape across the UK is experiencing significant shifts, with new arenas set to open in Newcastle, Edinburgh, Bristol, Sunderland, and Dundee. Manchester has just seen the opening of Factory International (Aviva Studios), a landmark new venue that's set to produce a year-round programme of dance, theatre, music and visual arts.

All of these developments underline the ever changing and evolving nature of the cultural scene across London and the UK. In an interconnected landscape where audiences are likely to engage with multiple arts organisations and venues, they all present both opportunities and challenges for us in the future.

What every arts organisation is watching is how audiences are returning post-Covid. At the recent Association of Leading Visitor Attractions (ALVA), they summarised the forecast as 'scattered clouds' in their keynote speech. Galleries and Museums are seeing a slow return to pre pandemic visit levels (at around 85% and rising), while inbound tourism is at around 90%. What is noticeable is that these institutions are seeing a higher demand for their free offer over paid-for exhibitions.

Classical Music is hardest hit. Concert venues and orchestras continue to be concerned by the 'missing older audience' that does not appear to be returning. Of course, our focus is often on young audiences but for many organisations, the more financially-stable older audiences (a demonstrably growing demographic) is their bread and butter.

There seems to be an inconsistent return to Theatre and Contemporary Music, with a feeling that audiences are maybe somewhat more discerning post-pandemic, and the industry struggles with increasingly late booking patterns. Barbican cinema seems to have recovered well, given the continued scaremongering in the industry, with attendances largely matching, often exceeding, the five-year average. A

number of times this year, we've been among the highest performing cinemas for premium new releases.

## **Audience Numbers**

Please refer to Non-Public Appendix 1

## **Brand & Audience Strategy**

In the short term (next 12 months) the Barbican will adopt a seasonal brand strategy with a series of campaigns planned to broadly highlight the Barbican as an overall destination that will improve awareness of the current offering. These campaigns will focus on making the Barbican more accessible and appealing to a wider, younger, more diverse audience.

These brand campaigns will feature both programme and destination highlights for the period and will pick up on seasonal hooks and opportunities to highlight the brand credentials of individual artforms where appropriate all with a firm eye on new audiences and how we translate our programme in an understandable way.

Amplifying these campaigns through comprehensive integrated campaigns that include above the line media spends as well as our owned media channels will be vital. Working in conjunction with Destination City to take advantage of joint marketing and communications opportunities to highlight the City of London as a hub for culture and entertainment will be a pivotal part of these campaigns.

The campaigns currently either in -progress or development include:

- *Unwrap the Barbican*: Dec 2023 Aimed at highlighting the range of experiences at the Barbican over the festive period.
- *Bitesize Barbican*: Jan-Mar 2024 Aimed at highlighting the Barbican to new audiences looking for affordable and time efficient options post-Christmas.
- *Designed to be Different*: Apr/May 2024 This campaign will highlight the four unique visual art experiences that can be enjoyed at the Barbican.
  - Exhibitions with Impact - Main Gallery - *Unravel*
  - Our Cornerless Gallery - The Curve - Discover experiments across art, film and design from names you'll want to know. Soufiane Ababri
  - Find Our Commissions - Ibrahim Mahama & Ranjani Shettar
  - Look Around You - The Barbican building.
- *Summer Campaign*: June/July/August 2024 – in development
- *Cinema Campaign*: September/October 2024 – in development
- *Festive Campaign*: November/December 2024 – in development

In the longer-term (next 18 months) work will commence on a comprehensive audience research and branding project that will focus on identifying new audience drivers and a new brand positioning for the Barbican that will focus the organisation on the strategic framework.

This project will develop public facing brand values, USP's, positioning, personality and tone of voice that supports our vision and values. This work will form the basis of how we present ourselves to audiences, staff, stakeholders, and partners moving forward. It is envisaged that this work will begin in the new year in conjunction with the new Director for Audiences commencing.

## **Digital Experience & Capability**

Please refer to Non-Public Appendix 1

## **Membership & Young Barbican Strategy**

Membership levels for the Barbican have been driven in past years by major exhibitions, high demand theatre shows and the Covid lockdown.

Number of members, number of Young Barbican members as well as associated tickets sales have significantly increased this financial year as the programmes continue to recover post Covid. For more detail on Membership & Young Barbican Numbers, please refer to Non-Public Appendix 1

### Membership Opportunities – 2024

The revenue generated from the Barbican membership scheme is key and represents 11% of the Barbican's total ticket revenue as well as over £1M in fee revenue. Maintaining and growing that revenue will be a key focus of 2024.

An external membership review was undertaken in mid-2023 which looked at the current Barbican membership scheme to consider opportunities for growth and improvement.

As a result of this review and consultation internally the membership scheme will be re-launched later in 2024

There are four central issues which will be addressed:

1. The benefits model is confusing with inconsistent restrictions and caps across events that not only make it difficult for members to feel like they are getting full value for their membership fee but also to clearly communicate to potential new members why they should join.
2. The membership tiers do not provide a clear path from standard member to potential patron. It is necessary to have well defined tiers with clear benefits in each that are differentiated. In addition to this how Young Barbican members are converted to standard members will be considered as well as a potential low cost paid version of Young Barbican.
3. The membership lounge (which is a valued benefit in other institutions) is not delivering value to members as it is not viable to consistently open it and it does not provide the F & B offer necessary therefore consideration will be given to how this is either improved or replaced entirely with another benefit.
4. We are not able to currently track membership activity in the centre outside of ticket sales. There is a need to be able to track retail, bars, restaurants and Wi-fi usage to gain a true picture of the value of members and to engage with them on a deeper level, drive engagement and identify possible patrons.

## **Pricing and Yield Management**

Research since the pandemic shows a number of trends in pricing and attendance for cultural venues. On reopening, the perception was that committed arts attenders were desperate to get back into arts venues, so prices increased (in an attempt to recoup the losses experienced by venues and artists). However, return has been slow in some areas – performing arts in general and Classical Music in particular – and attendances are still taking a while to return to pre pandemic levels.

Cost of living concerns have become a significant factor too. While the top priced tickets, and premium experiences, are as popular as they ever were, many people report that they are reining in their spending, wanting to pay less for meals out and seeking free/low-cost things to do.

Commercial rentals taking up a higher proportion of our programme in Theatre and price pushes (in consultation with artist management) in Contemporary Music, have seen real term price increases. In Gallery, Cinema and Classical Music, our yield has decreased in real terms since pre pandemic. For more information on numbers please refer to Non-Public Appendix 1

In the first six months of 2024, our box office managers are trialling a manual approach to dynamic pricing which will aim to make fewer, but hopefully more impactful, dynamic price changes, but also doing a lot of detailed work in moving, expanding or contracting, price bands within a seating plan.

In both trials we are protecting the lowest price bands (usually between £15-25) and ensuring that, where there is availability, there are always a range of price points available.

Alongside this work, we're examining a more systematic process for setting starting prices before dynamic pricing kicks in.

We are working with Finance and Box Office on the modelling a significant review of our concessions across the Centre, which links with our new audience strategy. This includes an expansion of our very successful Young Barbican scheme by increasing the upper age from 25 to 29 and the introduction of consistent concessions for those on Universal Credit and associated benefits.

As always, using tactical measures to shift unsold inventory is always part of our marketing campaigns.

## **Marketing Media Performance: Paid media**

The move from traditional print and out-of-home to digital continues, with 67% of our media spend going into online channels, mainly social and predominantly Meta.

Out-of-home is most commonly reserved for long-running Gallery exhibitions as we want to stand alongside the big arts institutions in the public eye. Recent Barbican research has shown that 25% of respondents became aware of an exhibition from a poster on public transport.

It's worth saying that attribution is not an exact science on digital channels either. There is some doubt as to whether Meta reports conversions reliably and, of course, it's not possible to directly measure the audience awareness/recall of impressions delivered.

### Meta (Facebook and Instagram)

Clickthrough rate (CTR) 0.87%  
Cost per click (CPC) £0.24  
Cost per 1,000 impressions (CPM) £4.40  
Engagement Rate 1.84%  
Return on investment (ROI) £1.59

Here our CTR is slightly below our media agency benchmark (1%), however the engagement rate is slightly above their benchmark of 1.75%. ROI is respectable, considering this has been close to 0 for many of their clients.

TikTok  
CTR 0.72%  
CPC £0.28  
CPM £2.01

On TikTok, the CPM is very cost-effective and CTR is above our media agency's benchmark of 0.67%.

Google  
CTR 0.20%  
CPC £0.59  
CPM £3.23  
ROI £-0.72

On Google, our CTR is sitting at the benchmark of 0.20%, which is good. We put less investment into Google and tend to use Google Display Network banners and YouTube campaigns more for brand awareness, so ROI has not been the main KPI for these channels.

Please refer to Non-Public Appendix 2 - Paid media spend for FY 22/23

## **Marketing Media Performance: Owned media**

### Barbican Website

The Barbican website received an average of 293,857 active users a month (peaking at over 330,000 in the months Totoro went on sale and opened) leading to 16,831 conversions. Interestingly, but maybe not surprisingly, the top two referrers to our website in 2023 were the RSC and *A Strange Loop* websites, closely followed by Facebook, Instagram and Twitter. BBC (home of the BBC SO), Darbar and Songkick (the concert discovery service) came next.

### Social media channels

Our total audience on our social channels has grown to 1,686,562 followers. Over the last 12 months have seen a drop in net growth caused by people leaving Twitter, and a slowing of people joining Facebook, which has not been totally offset by a continued and strong growth in Instagram followers.

Our TikTok account is still in its infancy, and we acknowledge this needs much more investment to grow a presence on this increasingly important channel.

Over a year into our new, and still evolving, social media strategy, we've posted less, and our channels have delivered fewer overall impressions (down 23.9% on last year, mainly on



Twitter). However, the good news is that engagement has increased (up 29.6%, the biggest growth being on Instagram).

Video continues to be the most effective content and video views across our channels have increased by 115.4% in the last year. Again, this is all despite huge drops in impressions and engagements on Twitter.

### Emails

Email is the backbone of our marketing and CRM. Our marketable database (those who have opted in to hear from us and have had any kind of engagement with us in the last twelve months) grew from 195,825 to 242,529 across FY 22/23 and currently stands at 257,168. On top of this, we have a marketable Membership email list of 13,376.

Our emails have good engagement by media & entertainment benchmarks. In FY 22/23 emails made us £630,302 in income, which does not include unattributable secondary income from our pre-visit emails.

<b>FY 22/23</b>	<b>unique open rate</b>	<b>click through</b>	<b>average monthly income</b>
Media & Ents benchmark	23.90%	2.90%	
All Barbican emails	45-57%	3-17%	£52,525
Members	59-89%	9-56%	£16,870
Weekly round-up	44-51%	2-5%	£20,686

### **Marketing Department Structure**

After a difficult few years, it will be important to clearly define the overall purpose of the Marketing team at the Barbican in 2024 and ensure the structure of the team supports the strategic framework.

Several senior roles within the team were not replaced during Covid and this has led to a lack of leadership and no defined career path for the team. Specifically, there is a gap in digital and brand marketing that must be filled as well as the need to ensure that current ways of delivering artform marketing campaigns are aligned and as efficient as possible.

The introduction of brand campaigns at the end of 2023 has marked the beginning of a new way of planning, prioritising and budgeting for Marketing, in consultation with our Communications colleagues.

While there will always be substantial resource allocated to individual artform events, a higher proportion of resource will go towards activity that delivers bigger messages about the Barbican to a wider more diverse audience.

### Artform Marketing

Our Artform Marketing team consists of specialist Marketing Managers and Marketing Assistants for each individual artform. We're examining how each of the artform campaigns teams work, exploring how we can improve planning and processes, and work more efficiently to manage workloads and make the team able to play a more active role in supporting our strategic objectives. With the interim Head of Marketing in place, the Deputy

Head of Marketing is able to give more focussed support and guidance to the campaigns teams.

Some level of artform knowledge will always be important but we're keen to place more emphasis on developing marketing and collaborative skills within the team and assigning projects and responsibilities to people outside their usual artform area.

This has come into focus in the way we've been running our new cycle of, largely cross-arts, brand campaigns, with each having a different project team assembled under the sponsorship of either the Head or Deputy Head of Marketing. Another innovation has been the combining of the Contemporary and Classical Music marketing teams where workload has traditionally been unevenly distributed through the year.

### Central Marketing

Our Central Marketing team consists of the design, social media, destination and digital marketing team. This team handle all artwork and content requirements for the Barbican and are briefed by a variety of marketing and non-marketing colleagues. The workflow management for these teams will be a significant area of focus for 2024 as we work towards greater efficiencies and collaboration across the Barbican.

### Media Buying

Media Buying is handled by an external media agency. This agency is procured within a framework led by the British Library that includes a range of galleries, museums and heritage venues including the Tate, The Museum of London and Tower Bridge

The Barbican have worked with Havas for over 12 years, but this will change in 2024 to a new agency Anything Is Possible as a result of a competitive tender process.

In terms of media buying in 2024 we will be evaluating our approach in relation to multiple individual event campaigns and incorporating more substantial brand campaigns both within and across artforms in our overall media buy. Media buying will have a strong focus on audience development.

## **Corporate & Strategic Implications**

### Strategic implications

This plan supports the Barbican's strategic framework and supports the delivery of the City's Corporate Plan by

- **Contributing to a flourishing society** - We acknowledge that arts, culture and civic spaces such as the Barbican have their part to play in delivering wellbeing benefits to the diverse audiences who visit, work and live in the City. A great part of our work is about making the Centre's arts programme and learning initiatives appealing and welcoming to the widest possible audience.
- **Supporting a thriving economy** - We're committed to using our resources in the most efficient and effective way possibly, to set and reach income and audience targets and contribute to the Barbican's sustainability.
- **Shape outstanding environments** - A priority is to invest in our digital team, increasing our capability and capacity in order to provide a world-leading digital

experience for both our in-person and online audiences, including optimised user journeys and engaging content that promotes the Barbican's brand.

Financial implications – This plan will be delivered within existing budgets.

Resource implications – the approach will be delivered within existing resource allocations, with approval for any emerging additional requirements sought through standard processes.

Legal implications – none

Risk implications – none

Equalities implications – This plan aligns with the Barbican's Audience and EDI strategy in terms of welcoming new more diverse audiences to the Barbican.

Climate implications - none

Security implications – none

## **Conclusion**

As the marketing team moves forward in 2024 after a sustained period of uncertainty the team are confident about the future and looking forward to a year of focussing on brand and new audience development. There is still work to be done on the structure and how resources are allocated but with a laser focus on working collaboratively both within the team and across the Barbican I am confident we are in a good position. Further updates will be provided in the CEO's report throughout the year.

## **Jackie Ellis**

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