



ROYAL
ALBERT
HALL



Shining a Light on the Shadow Audience

Revealing and Re-engaging Unknown Attendees

24 March 2026

Your presenters today...



Isabella Anderson
Senior Insight Manager
Royal Ballet and Opera



Louise Halliday
Director of Audiences
Royal Albert Hall



Kirk Mortensen
Chief Product Officer
True Tickets

Agenda

- What is the Shadow Audience and how big is it?
- Case Study from Royal Ballet and Opera
- Strategic Perspective from Royal Albert Hall
- Discussion

About True Tickets



100+

Clients Across 4
Countries



27.9M+

Secure Digital
Tickets Delivered



3.7M+

Tickets
Shared



1M+

New Booker Records
from Ticket Sharing

What is the
Shadow Audience and
how are they revealed?

Hidden Shadow Audience

	Isabella	Kirk	Louise	Gary
Ballet on Friday				
Concert Next Month				
Christmas Panto				

Hidden Shadow Audience

	Isabella	Kirk	Louise	Gary
Ballet on Friday	 Booker (3)			
Concert Next Month				
Christmas Panto				

Hidden Shadow Audience

	Isabella	Kirk	Louise	Gary
Ballet on Friday	 Booker (3)			
Concert Next Month	 Booker (3)			
Christmas Panto	 Booker (2)			

Hidden Shadow Audience

	Isabella	Kirk	Louise	Gary
Ballet on Friday	 Booker (3)	Shadow	Shadow	
Concert Next Month	Shadow	 Booker (3)	Shadow	
Christmas Panto	Shadow	 Booker (2)	-	

Hidden Shadow Audience

	Isabella	Kirk	Louise	Gary
Ballet on Friday	 Booker (3)	Shadow	Shadow	 Booker (8)
Concert Next Month	Shadow	 Booker (3)	Shadow	 Booker (8)
Christmas Panto	Shadow	 Booker (2)	-	 Booker (8)

Hidden Shadow Audience

	Isabella	Kirk	Louise	Gary
Ballet on Friday	 Booker (3)	Shadow	Shadow	 Booker (8)
Concert Next Month	Shadow	 Booker (3)	Shadow	 Booker (8)
Christmas Panto	Shadow	 Booker (2)	-	 Booker (8)
Frequency	1	2	0	3
Segment	Infrequent attendee	Frequent attendee	Not in the database	Highly engaged across all art forms

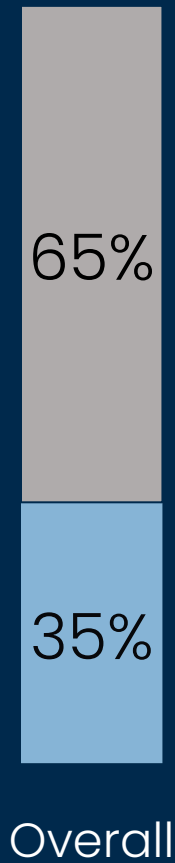
Revealed Shadow Audience

	Isabella	Kirk	Louise	Gary
Ballet on Friday	 Booker (3) Shared (2)	Revealed Shadow	Revealed Shadow	 Booker (8)
Concert Next Month	Revealed Shadow	 Booker (3) Shared (2)	Revealed Shadow	 Booker (8)
Christmas Panto	Revealed Shadow	 Booker (2) Shared (1)	-	 Booker (8)
Frequency	3	3	2	3
Segment	Highly engaged across all art forms	Highly engaged across all art forms	Frequent attendee	Highly engaged across all art forms

Revealed Ticket Sharing Details

	Isabella	Kirk	Louise	Gary
Ballet on Friday	 Booker (3) Shared (2)	Revealed Shadow	Revealed Shadow	 Booker (8) Sharing (8)
Concert Next Month	Revealed Shadow	 Booker (3) Shared (2)	Revealed Shadow	 Booker (8) Shared (8)
Christmas Panto	Revealed Shadow	 Booker (2) Shared (1)	-	 Booker (8) Shared (8)
Frequency	3	3	2	0
Segment	Highly engaged across all art forms	Highly engaged across all art forms	Frequent attendee	Ticket Tout

How big is the Shadow Audience?

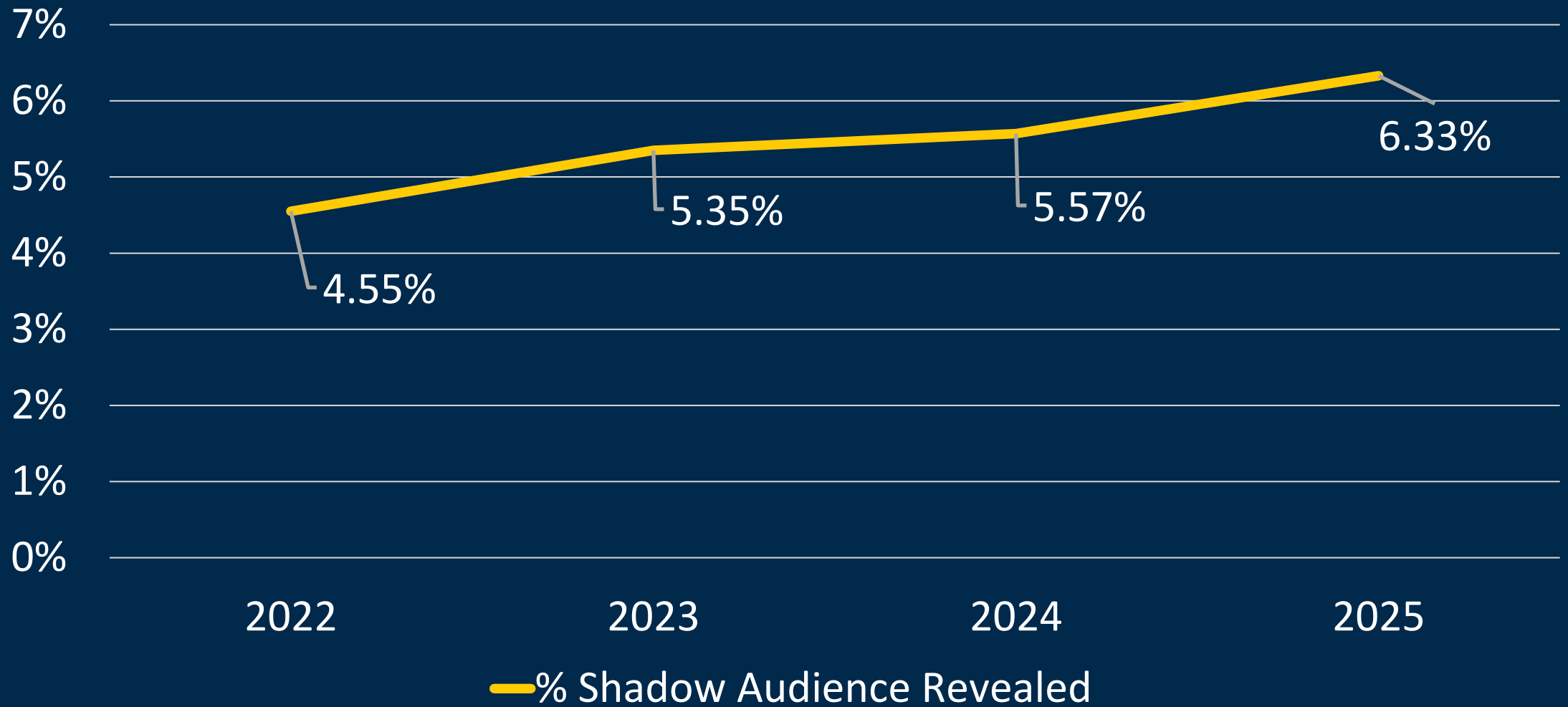


■ Known Audience Tickets

■ Shadow Audience Tickets

Data from 37 event organisers as of 30 June 2025

How much is being revealed?



Data from 37 event organisers as of 30 June 2025

Once Shadow Audience
members are known,
how do they behave?

Higher Opt-In Rates

Opt-in rate for standard acquisition
(primarily ticket sales):

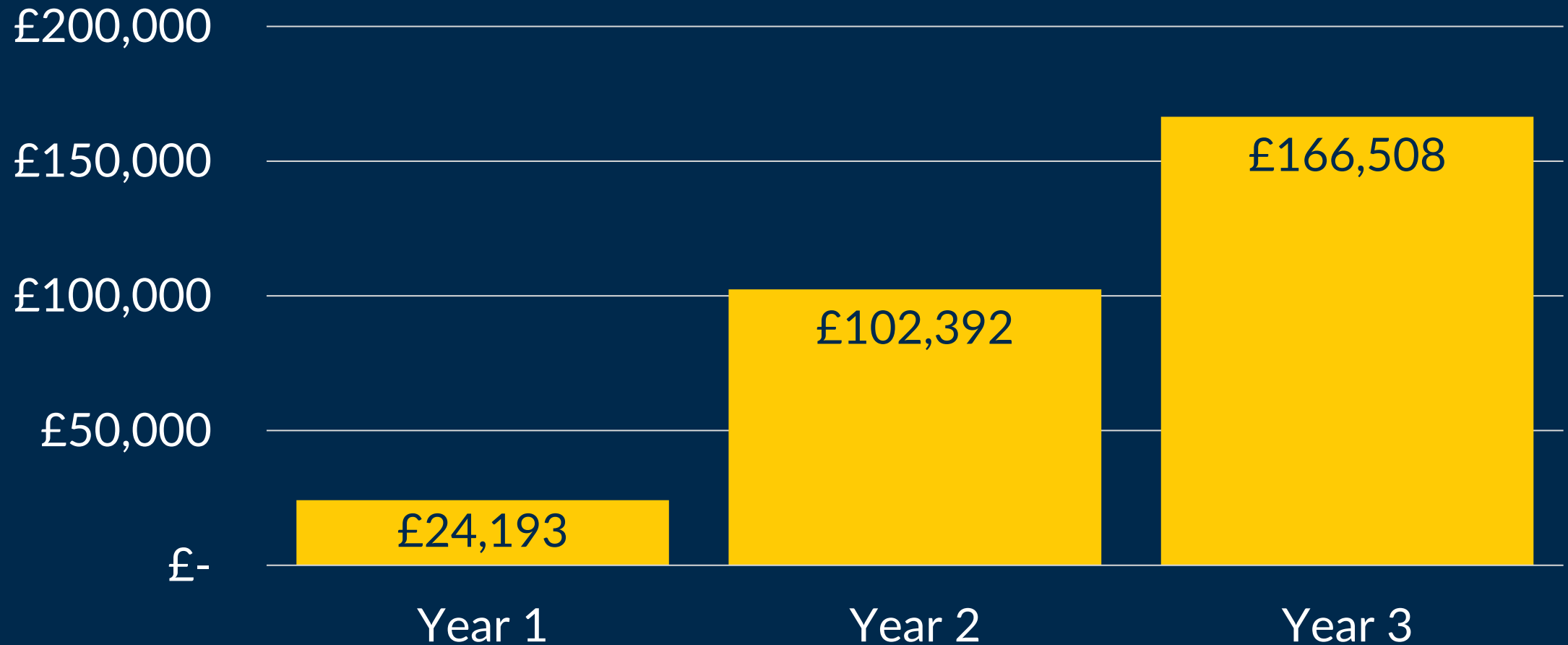
19%

Opt-in rate for revealed Shadow
Audience members:

24%

Booking Directly with the Organisation

Average Incremental Ticket Revenue



Data from 37 event organisers as of 30 June 2025

Generating Incremental Revenue



49K+

Subsequent bookers



£10M+

Incremental ticket sales



£215K+

Incremental donations

£10.2M+

Total incremental revenue



Data from 37 event organisers as of 30 June 2025



RBO Case Study

Isabella Anderson
Senior Insight Manager

Royal Ballet and Opera

- UK's home of world class opera and ballet
- Two world-class performing companies based primarily at the Royal Opera House, in the heart of Covent Garden
- Global reach: streaming platform, cinema season, company tours
- We are committed to widening access to the arts, grow audiences and diversify the future of opera and ballet.
- We want to use insight to learn about our audiences, to deepen engagement and encourage loyalty.



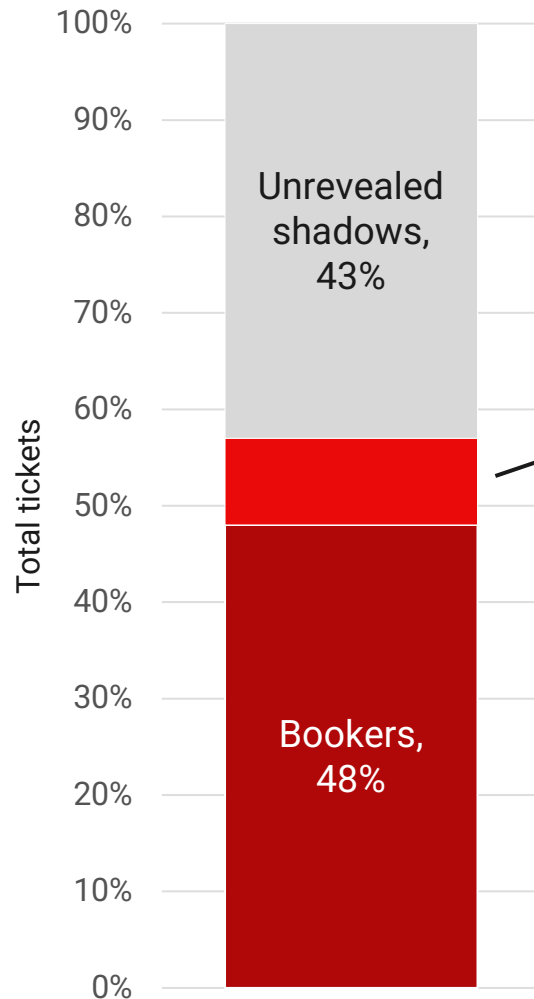
Why did we introduce secure digital tickets?

- Outdated ticketing solution compromising customer experience
- Strain on Box Office resources
- Understanding our audience

How might we take more of a data-driven approach without harming the CX?



What is the RBO learning?



9%

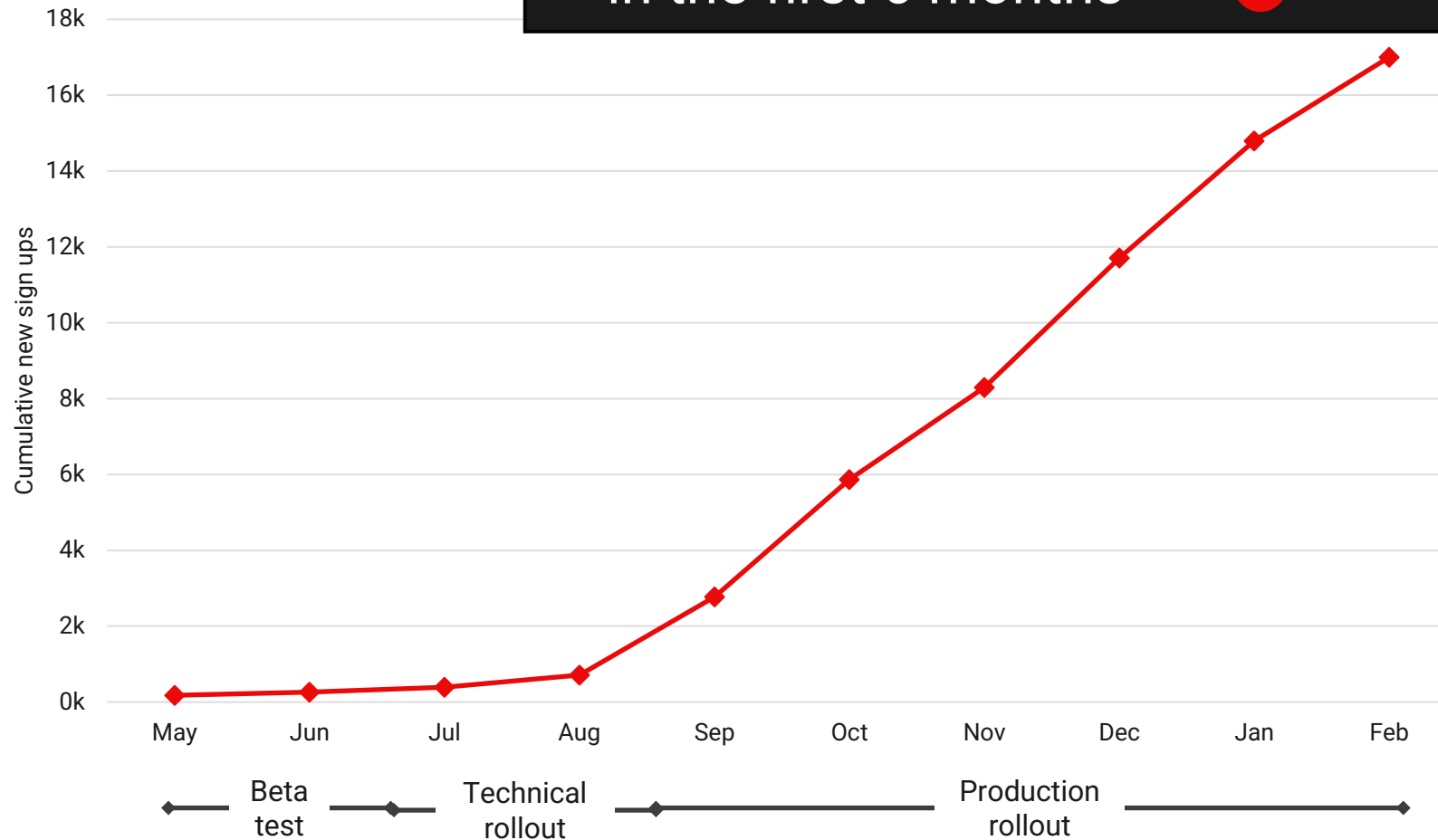
Additional digital ticket users revealed

With half of these revealed users brand new to our database

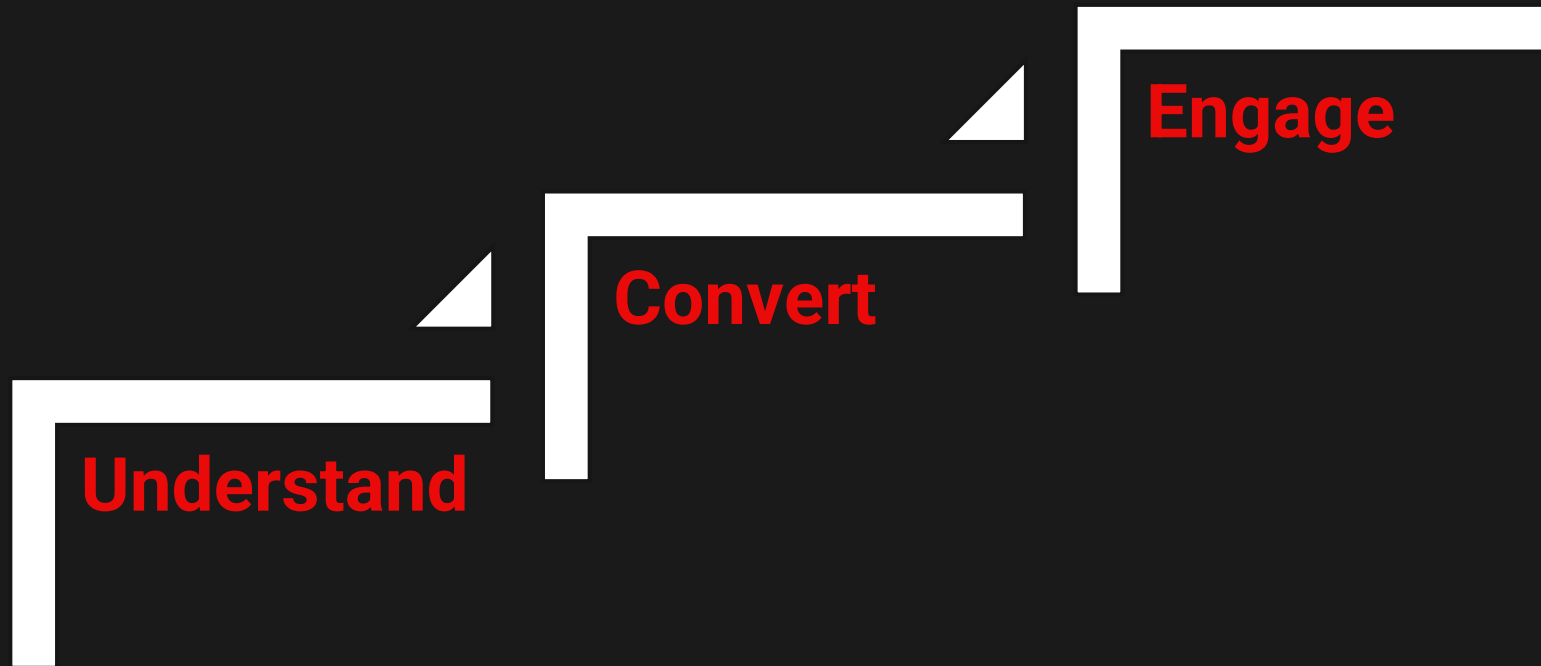


What is the RBO learning?

new accounts created
in the first 6 months  **17k**



Future plans



Outcomes: improved service and efficiency

Before	After
Limited data on attendees beyond the order owner	• Ability to communicate with more shadow audiences after tickets shared • Opportunity to increase revenue and customers
Ticket misuse	• Clear audit trail for each ticket on Tessitura to clarify any customer issues • Flexibility in dealing with customers' ability to re-share
Ticket duplication/ issues	• Significant reduction of double bookings on incomings • One singular instance of an active ticket at a time
Difficult ticketing journeys	• Improved ticketing experience for customers • Tickets available immediately after purchase
Accessibility standards not met	• Meets accessibility standards

ROYAL ALBERT HALL

Digital Ticketing

Louise Halliday, Director of Audiences and Organisational Culture



Context: Why Change Ticketing?

- High-demand events, complex seating and memberships create pressure on our ticketing systems.
- Audiences expect seamless mobile experience for purchase, sharing and entry.
- Promoters expect mobile tickets/rotating barcodes for high profile events.
- Secondary markets, touting and fraud risk both reputation and customer trust.
- We don't know who's attending so we can't contact them for changes to the programme, to ask them what they thought or to build relationships.

Our Strategic Goals

- Protect audiences and the Royal Albert Hall's reputation.
- Put the customer at the heart of our digital journey, from purchase to applause.
- Grow revenue and loyalty through better use of first-party data.

Touts

- PDF/email tickets are easy to duplicate or resell in bad faith.
- High-profile shows at the Hall regularly attract touts and inflated resale pricing.
- Fans who buy from unofficial channels risk invalid tickets and blame the venue.
- We have no visibility of who's actually attending and cannot build relationships.

Terms and Conditions

Rules, schmules...

“Reselling a ticket, other than through Twickets, makes it void and the ticketholder may be refused entry. Tickets sold via third parties and other unauthorised outlets, including online auction sites, are not valid for admission.

The exception to this is Members’ tickets purchased directly from the Members of the charity.”

And yet...

Tickets on Viagogo

Last Night of the Proms

Ticket price 3 × £1,036
Tax ⓘ 3 × £8
Total price £3,135
[Price breakdown](#)

3 

Confirm

Face value per ticket

£6.86

£1,036

Grand Ole Opry

Ticket price 2 × £2,588
Tax ⓘ 2 × £20
Total price £5,217
[Price breakdown](#)

Continue

Ticket price is often based on an event's price, not the original cost of acquiring the tickets, including fees. Face value per ticket (excluding fees)

£495

£2,588

Additional challenge for us

Seatholders' tickets

Hoorah Tickets

Search Events

Events

Discounted Tickets

About

Contact Us

Friday 27 February 2026, 3:30pm

Friday 27 February 2026, 7:30pm

Wednesday 4 March 2026, 7:30pm



FROM £150.00

A Night with the Legends - SAVE UP TO £50

Thursday 5 March 2026, 8pm



FROM £93.50

SAVE UP TO £25.00

Rapperholi London - Ghana Independence Day

Friday 6 March 2026, 7:30pm



FROM £92.00

Anna Lapwood

Sunday 8 March 2026, 6pm



FROM £115.50

Gipsy Kings

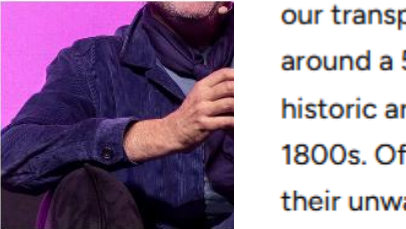
Monday 9 March 2026, 7:30pm



FROM £1.00

Music is for Life! 2026: 'Lookin' Up'

Tuesday 10 March 2026, 7:10pm



FROM £1.00

Alex James' Brit Classical

Wednesday 11 March 2026, 7:30pm

A Night to Remember with Hoorah Tickets

Gain access to privately owned seats at the Royal Albert Hall, enjoy performances and shows of your choice and never pay more than face value for your ticket (plus our transparent booking fee) when you book with us. You may not know this, but around a 5th of the seats within the Royal Albert Hall are privately owned, due to an historic arrangement created at the time of the venue's construction back in the late 1800s. Official Seat Holders (Members) of the Royal Albert Hall are permitted to sell their unwanted tickets, and that is where we come in, connecting you with available performances so that you can enjoy the Royal Albert Hall in a seat that would otherwise have been left empty.

Current solutions

Preventing ticket harvesting

Bot prevention:

- Captcha
- Bot blocking
- Account blocking
- Policing secondary sites

Manual ID checks

David Gilmour

Wednesday 9 - Tuesday 15 October 2024 Auditorium

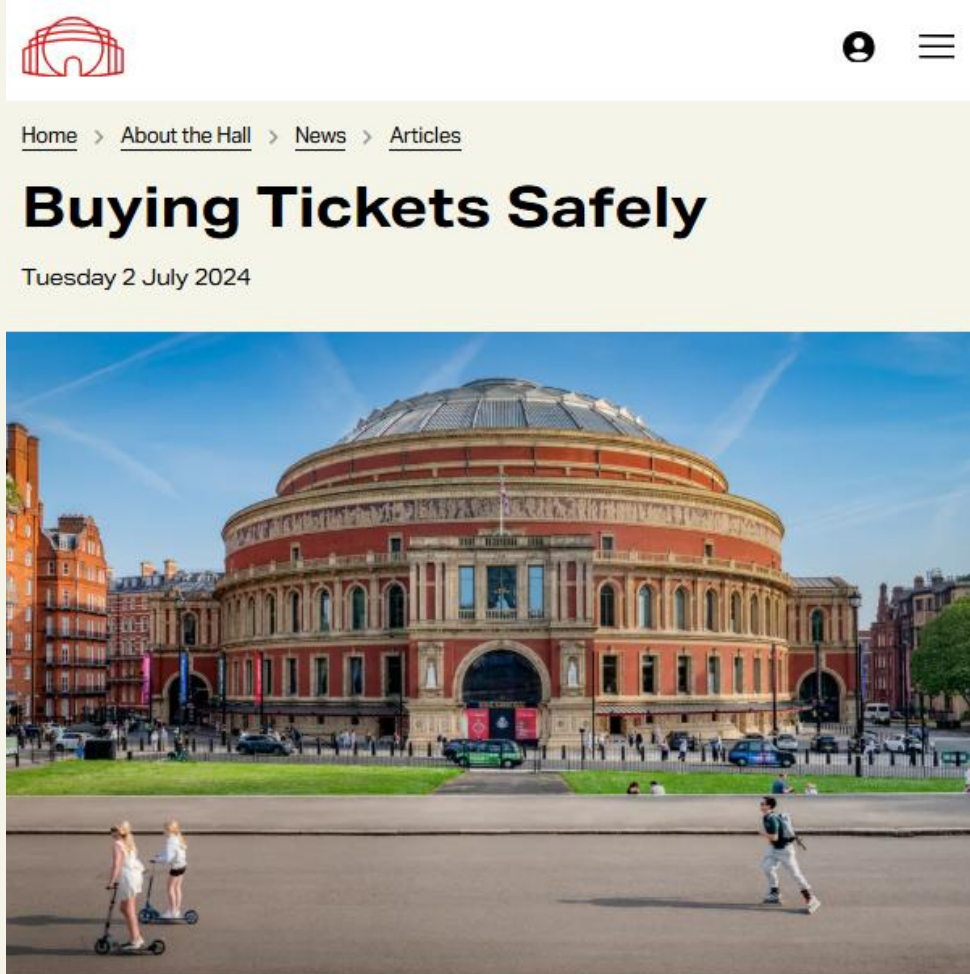
ID Checking will be in place for this concert. Before booking tickets please be aware of these details:

- The name of the lead booker will be printed on each ticket.
- The lead booker must attend the concert and photo ID in its original format (no photocopies) will be required to gain entry to the venue. There will be no exceptions to this rule. Photo ID can be any formal, recognisable form of ID such as a passport, driving licence, bus pass, work pass etc.
- The name cannot be changed once the booking has been made.
- If you are booking more than one ticket your guests must enter the concert at the same time as you. Failure to do so will result in the guests being turned away. Only the lead booker can collect tickets from the box office; you cannot leave tickets to be collected by your guests.
- Failure to adhere to these terms and conditions will result in your order being void.
- There will be no re-admittance allowed.
- Due to the ID checks taking place, customers are advised not to buy tickets as presents unless they are also attending the concert as the lead booker.

Current solutions #2

Other things

- Education
- Communication
- Legislation



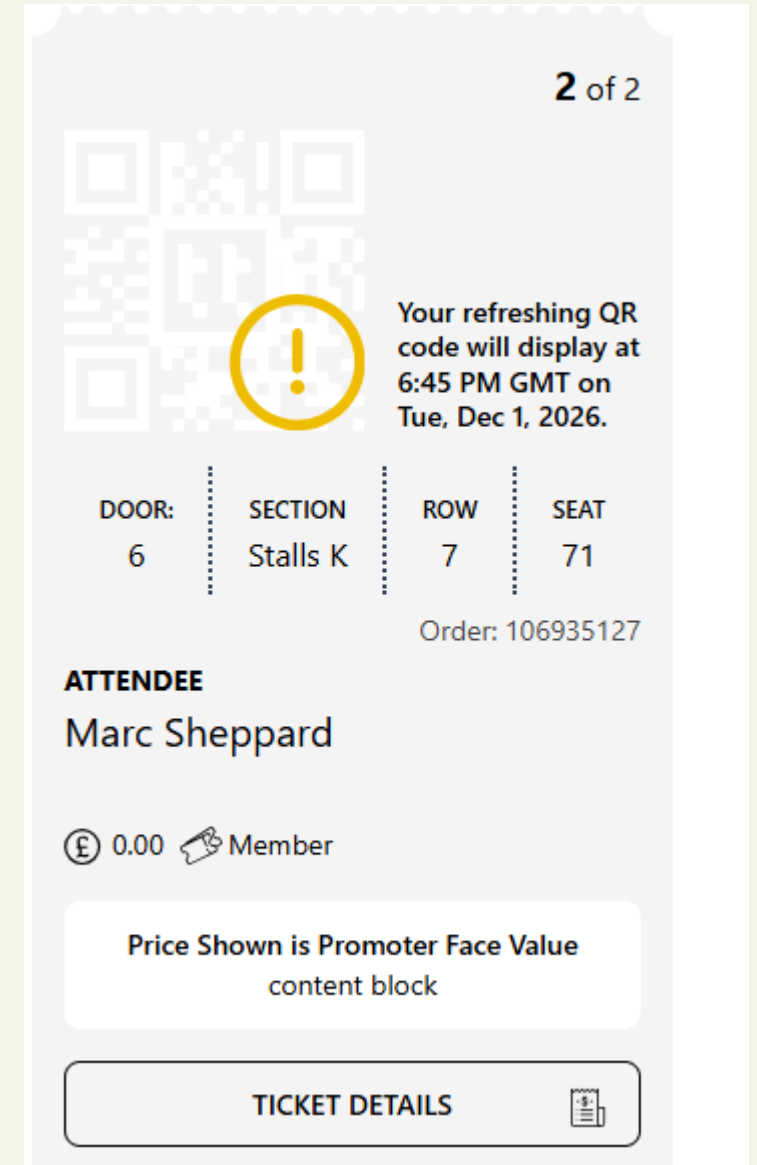
Unfortunately, we have seen an increase in the number of customers buying tickets from unauthorised websites which can sometimes be fake, duplicates, or many times above face value. This can be very upsetting when people arrive for an event and are turned away or realise that they have been mis-sold tickets.

It's of paramount importance to us that genuine tickets end up in the hands of genuine fans. We are taking steps to combat the issue as best we can, including speaking to an e-commerce supplier who use dynamic barcodes, which mean that we can track the ticket when it's transferred, and turn off the option to transfer, when appropriate.

We block millions of bot requests on our website. Our security checks may make your

True Tickets

- Dynamic Barcodes cannot be duplicated.
- We always know who is in possession of the ticket.
- Suspicious patterns can be detected, investigated and blocked.
- Allows customer communication to shadow bookers.
- ID check shows can move to E-tickets (currently hard tickets only).



What next?

- Testing functionality on test system.
- Looking at customisations.
- Aim for launch in May after Proms code-freeze.
- Will trial on some events first.
- Version 16 in September and offer for all events.





Discussion