

# Dance Touring Partnership

## TELL IT LIKE IT IS....

### COMPARATIVE RESEARCH INTO AUDIENCES FOR DANCE AND DRAMA

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## Introduction

This is a summary of three pieces of research carried out for Dance Touring Partnership:

- analysis of key sales and marketing data for the Dance Touring Partnership tour of *Rumble* at 15 venues compared to a selected drama and contemporary dance event at most of these venues. *Rumble* toured in Autumn and Winter 2005.
- analysis of box office data for ticket buyers for Dance Touring Partnership events, all other contemporary dance, ballet, drama and comedy in 2004 and 2005 at Hall for Cornwall, The Lowry and Warwick Arts Centre.
- research into the perceptions of dance audiences held by nine marketers involved in promoting Dance Touring Partnership tours.

This summary should be read alongside the Overview of Research into Audiences for Contemporary Dance that was compiled as part of this project.

Note: all the averages given below are mean values.

### Join in

This summary will be, perhaps, most useful if readers compare their own perceptions of audiences for contemporary dance with the research results. If you wish to do this, please answer these questions before you turn the page:

What proportion of the contemporary dance audience do you think is aged 14-24?

What proportion of the contemporary dance audience do you think is aged 65+?

What proportion of the contemporary dance audience do you think consists of school parties?

What proportion of ticket buyers for contemporary dance do you think have not previously bought for dance at that venue?

What proportion of ticket buyers for contemporary dance do you think buy for dance events more than once a year?

What proportion of ticket buyers for Dance Touring Partnership's tour of *Rumble* do you think had also bought for a previous Dance Touring Partnership tour at that venue?

What proportion of ticket buyers for contemporary dance have bought tickets for more than one event at a venue but only bought for dance?

What proportion of ticket buyers for contemporary dance do you think live outside a 30 minute drivetime of the venue?

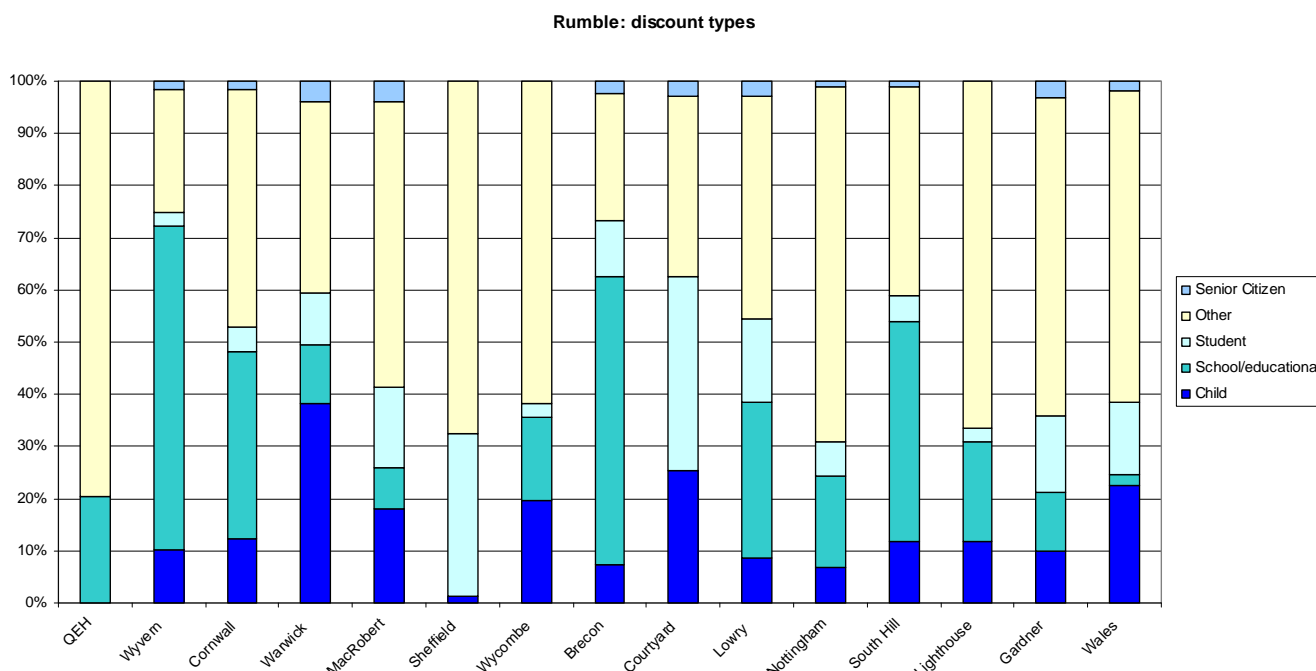
# 1. Who attends dance events?

## Q: How old are they?

A: The audiences for different companies and venues have very different age profiles. The age profile of the Rumble audience differed dramatically from venue to venue.

Proportion of attenders aged:	under 24	65+
Rumble tour <sup>1</sup>	31%-75% average 52%	0%-4% average 2%
Comparative contemporary dance events <sup>1</sup>	13%-93% average 43%	0%-22% average 7%
Comparative drama events <sup>1</sup>	1%-74% average 28%	2%-39% average 15%
Research overview <sup>2</sup>	13%-45%	14%-42%
Marketers' perceptions at contemporary dance <sup>3</sup>	5%-45% average 19%	1%-25% average 14%
Your perceptions (see page 2)		

The available data depends on what discounts were offered by the venues, but overall Rumble attracted relatively high proportions of under 24s and, as might be expected from the content, low proportions of over 65s. (Note that Queen Elizabeth Hall capped the total discounts sold to 20% of the available tickets.)



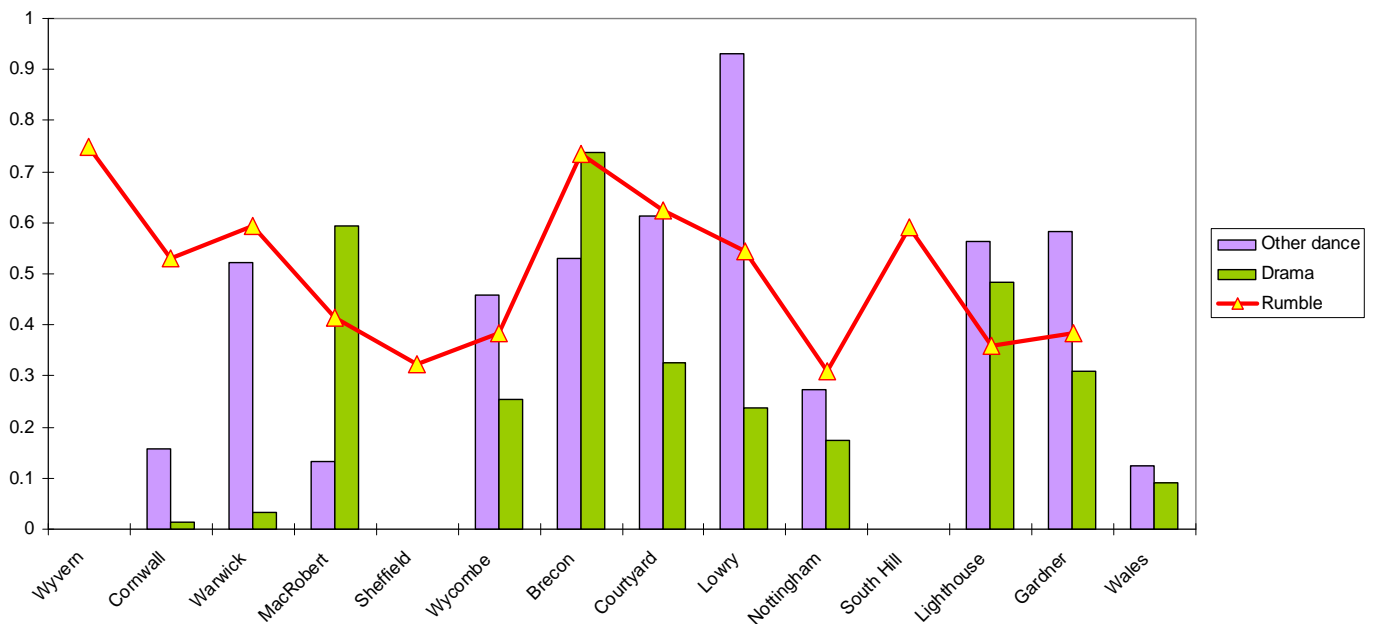
<sup>1</sup> Tickets sold at child, educational and student discount rates

<sup>2</sup> Results of questionnaire research

<sup>3</sup> Perceptions of the proportion of 14 – 24 year olds attending

In some venues, Rumble attracted a greater proportion of under 24s than the comparative dance or drama performances but at others it did not:

**% tickets sold at child/student/educational discounts**



At Hall for Cornwall and Warwick Arts Centre, a higher proportion of tickets were sold for Rumble at discount rates aimed at under 24s compared to previous Dance Touring Partnership tours and other contemporary dance events in both 2004 and 2005. At the Lowry, a smaller proportion of tickets were sold at under 24 discounts for Rumble than for contemporary dance in 2005 (see charts below).

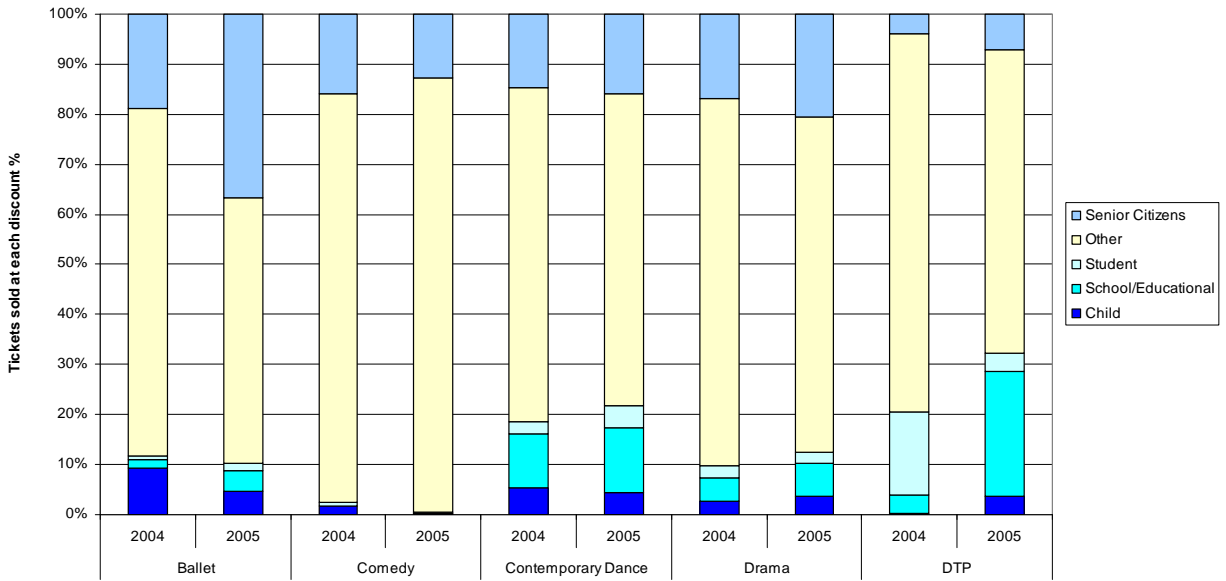
**Q: Does dance attract more young people than other artforms?**

A: The Research Overview indicated that contemporary dance as a genre does tend to attract a bigger proportion of under 16s than other artforms but that this varies widely between companies and venues.

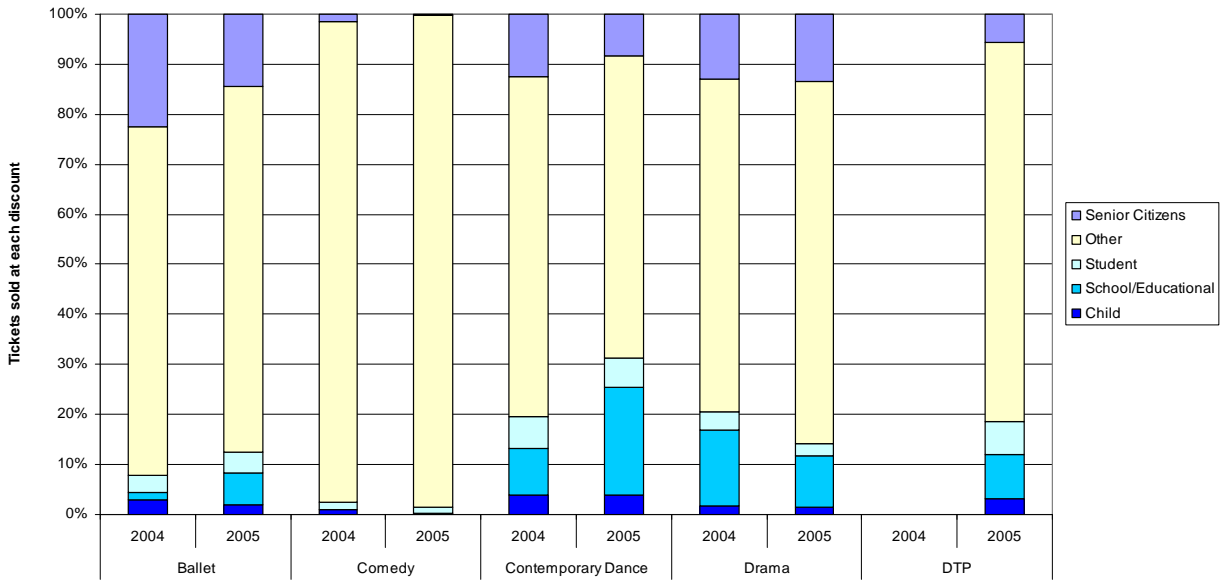
The analysis of customer data at the three venues participating in this stage of the project showed different patterns for age related discounts. At Hall for Cornwall, both contemporary dance and Dance Touring Partnership events attracted more young people than other artforms. At the other two venues, contemporary dance tended to attract more young people but there are anomalies. At Warwick Arts Centre, the 2004 Dance Touring Partnership tour attracted fewer young people than drama in both 2004 and 2005 but the 2005 tour attracted significantly more than both drama and contemporary dance. At The Lowry, Drama in 2004 attracted a higher proportion of young people than all other artforms apart from contemporary dance in 2005.

It would appear that the proportion of young people attending an event depends on a combination of the nature of that individual events and the profile of the audience at the venue rather than on the artform.

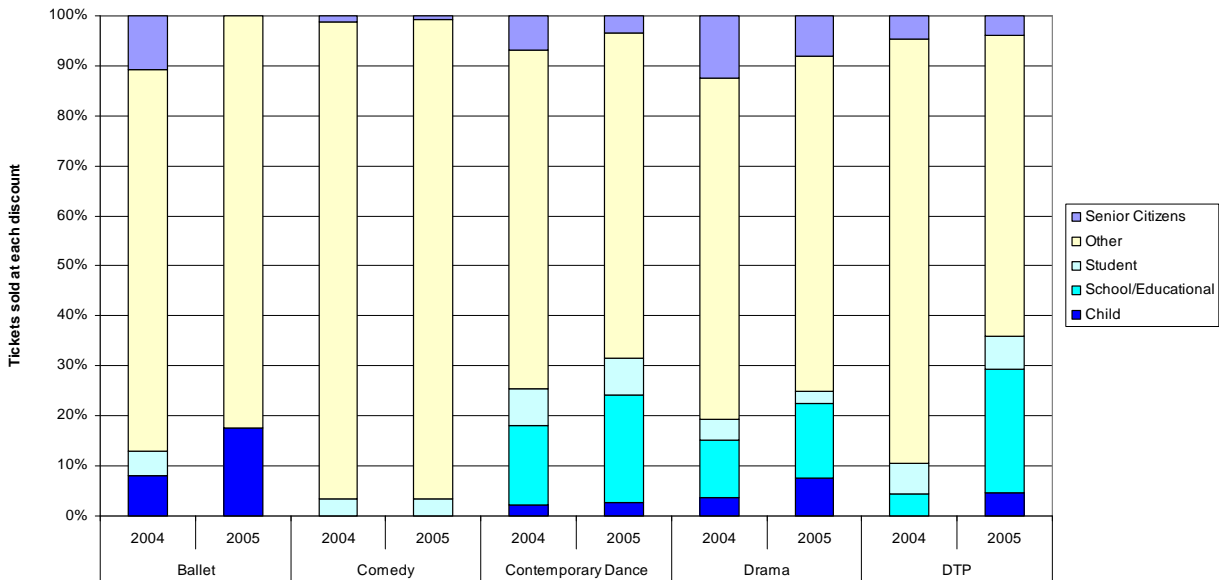
Hall for Cornwall: age related discounts



The Lowry: age related discounts



Warwick Arts Centre: age related discounts

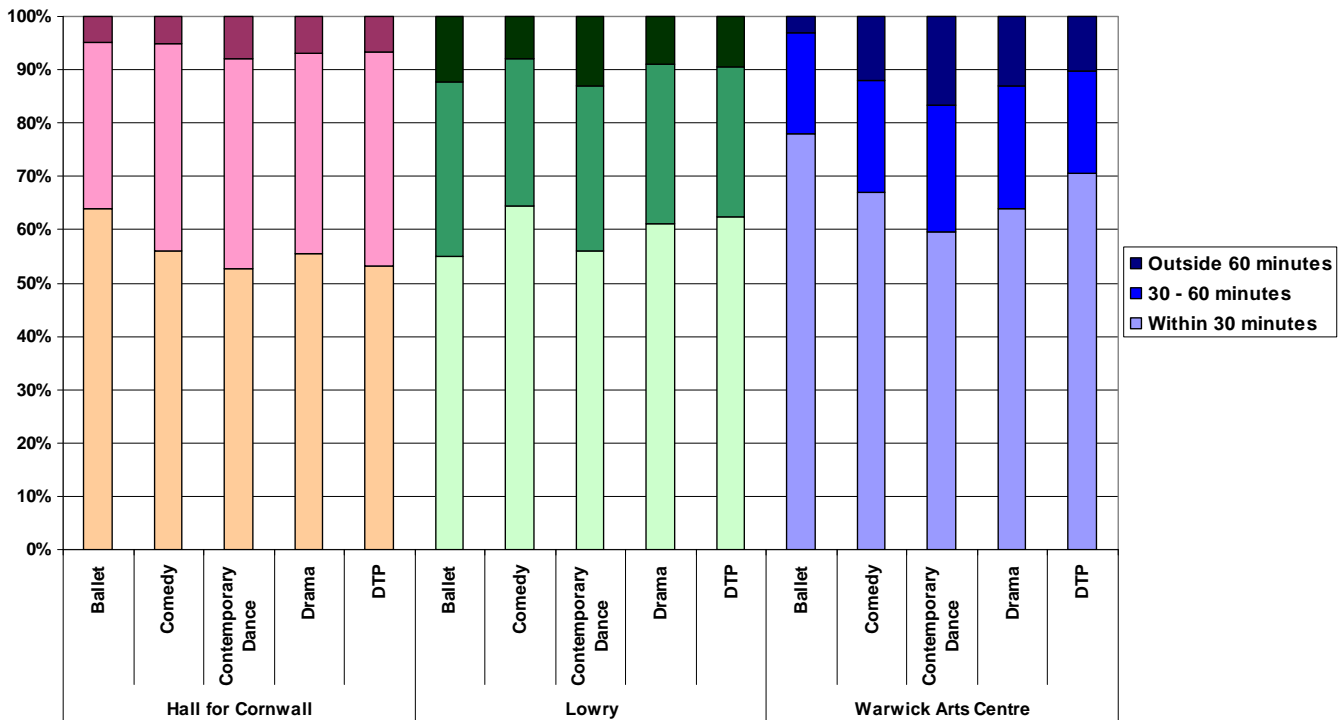


**Q: Are people willing to travel further to see dance?**

A: This depends on the venue and the company. On the whole, the catchment for contemporary dance is the same as the particular venue’s overall catchment, with a small number of enthusiasts willing to travel long distances but the majority coming from within 30 minutes. If the venue is in a very rural area, then a greater proportion of audiences for any artform come from outside 30 minutes’ drive.

	Dance audiences coming from outside 30 min drive time
Research overview	25% - 44%
Data analysis at three venues	40% - 47% average 44%
Marketers’ perceptions	5% - 60% average 35%

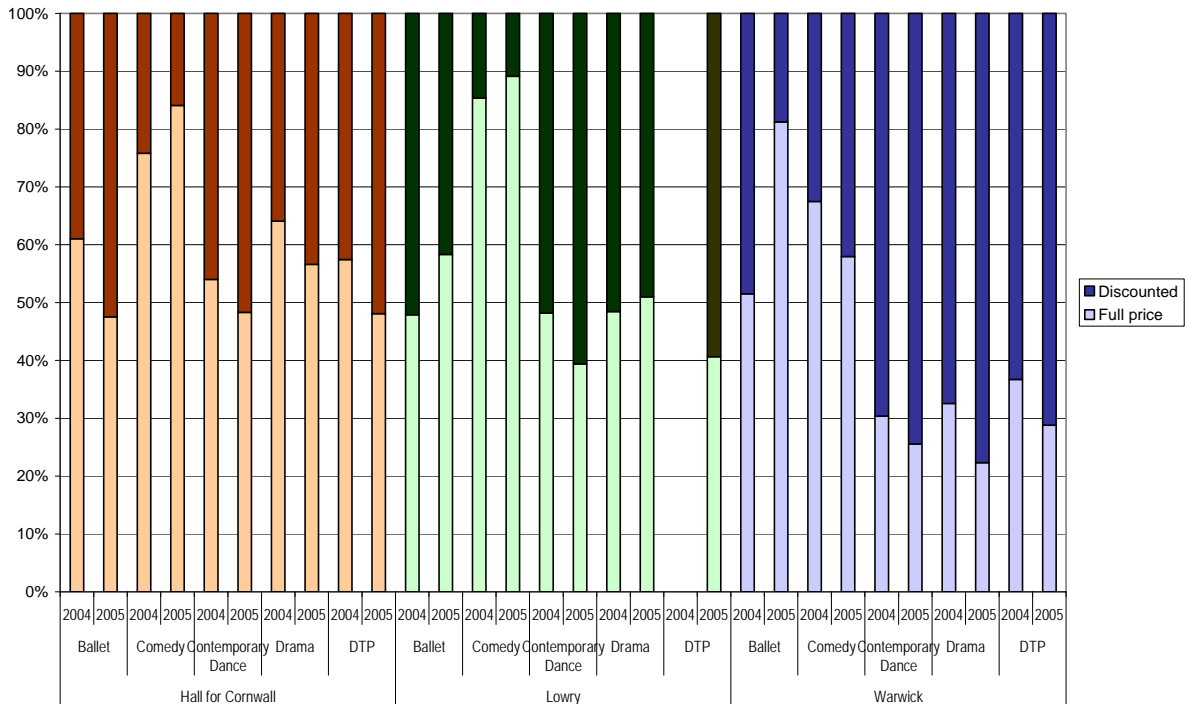
In the analysis of customer data at the three venues below, the percentage of contemporary dance audiences travelling from outside a 30 min drive time ranges from 40% to 48%. This is slightly more than other artforms at all three venues and is almost entirely due to a higher proportion of enthusiasts travelling for more than 60 minutes.



**Q: Does contemporary dance attract fewer full price ticket buyers?**

The number of full price ticket buyers appears to vary from venue to venue. Analysis of audience data at the three participating venues shows that Warwick Arts Centre tends to attract fewer full price ticket buyers for all the five art form types examined.

In all three venues, contemporary dance attracts a relatively low proportion of full price ticket buyers but not always the lowest. Contemporary dance, Dance Touring Partnership and drama events all attract fairly similar proportions of full price ticket buyers. Comedy sells the most full price tickets at all three venues.

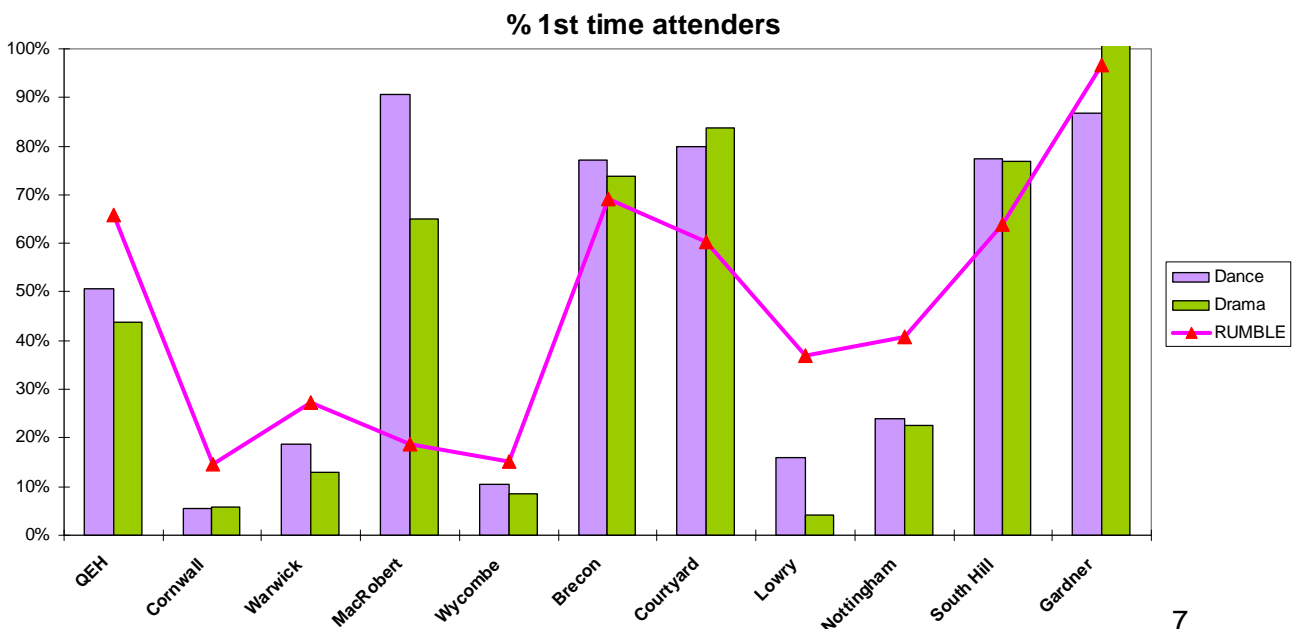


## 2. How often do they attend contemporary dance?

**Q: What proportion of dance audiences are first time ticket buyers at the venue?**

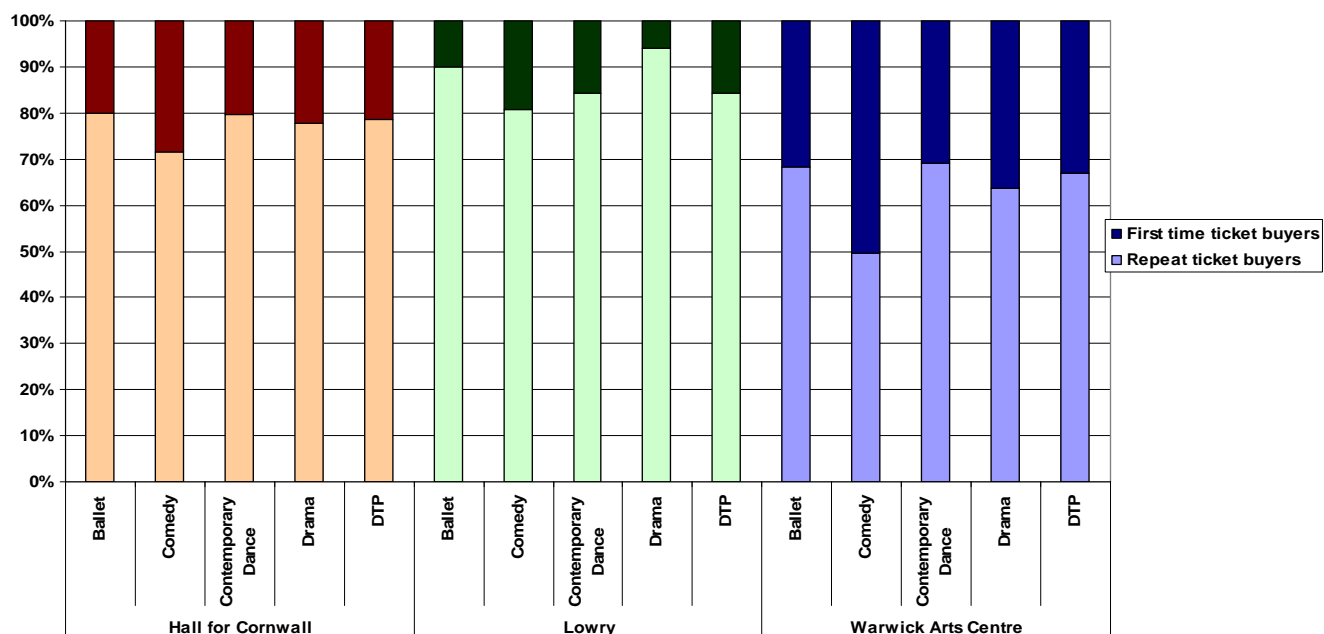
**A:** This depends on the venue, the company, the work and how it was marketed. If the marketing campaign relied heavily on the venue season brochure, then the event will attract far fewer first time attenders at the venue.

The key figures for Rumble tour and the comparative dance and drama event are roughly similar at most of the venues. Rumble succeeded in attracting significantly more first time ticket buyers than both the comparative drama and dance events at five out of eleven venues.



Looking at audience data from three venues in more detail, there is a relatively small difference in the proportion of first time ticket buyers for the different art forms at each venue. There are bigger overall differences between the three venues. Comedy attracts the highest proportion of first time ticket buyers at all three venues. Figures for ballet and contemporary dance are similar at both Hall for Cornwall and The Lowry. At Warwick Arts Centre and Hall for Cornwall, contemporary dance attracts the smallest proportion of first time ticket buyers although differences between artforms are small.

First time ticket buyers at the venue



**Q: What proportion attends dance more than once a year**

A: This depends on the availability of dance at the venue and the response rate to research involving self-completion questionnaires but it is rarely more than a third.

	Attend contemporary dance events more than once a year
Research overview	5% - 37%
Data analysis at three venues	13%-21% average 17%
Marketers' perceptions	8%-80% average 44%

Analysis of ticketing data at the three participating venues shows that between one in eight and one in five of the audience buys tickets for more than one contemporary dance event per year.

There is a perception among all but two of the marketers surveyed that audiences attend contemporary dance much more frequently than this.



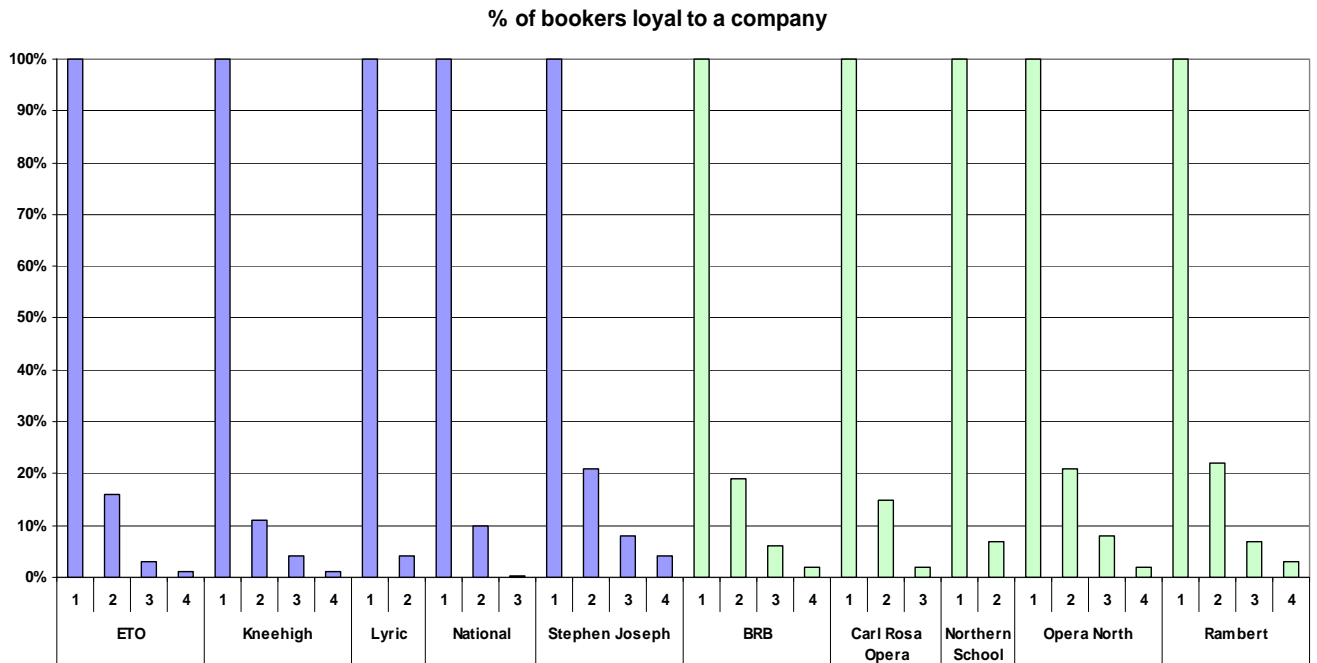
**Q: How big is the core dance audience?**

A: Whichever way ‘core’ is defined, it does not exceed 22% of ticket buyers – roughly one in five.

The ‘core’ dance audience could be defined as those buying tickets more than once a year. At the three venues participating in the data analysis stage, 20% of ticket buyers for dance fell into this category.

Another definition could be ‘loyal’ audiences who come back to see particular dance companies when they visit the venue again. The proportion of ticket buyers for the three dance companies analysed who returned to see them on their next visit ranges between 7% and 22%. The analysis was repeated for seven opera and drama companies. The highest proportion of ticket buyers purchasing for the next visit was 21% for opera and for drama.

The research overview identified that on the whole audiences do come back to see particular companies over time but the vast majority do not revisit year on year.



Most marketers in our survey over-estimated company loyalty, with a couple underestimating it. In particular, most are over-estimating the number of ticket buyers who are likely to see an Dance Touring Partnership tour every year.

	<b>Come back to any other DTP tours</b>
Research overview	20%
Data analysis at three venues	11%-25% average 18%
Marketers' perceptions	5%-40% average 25%

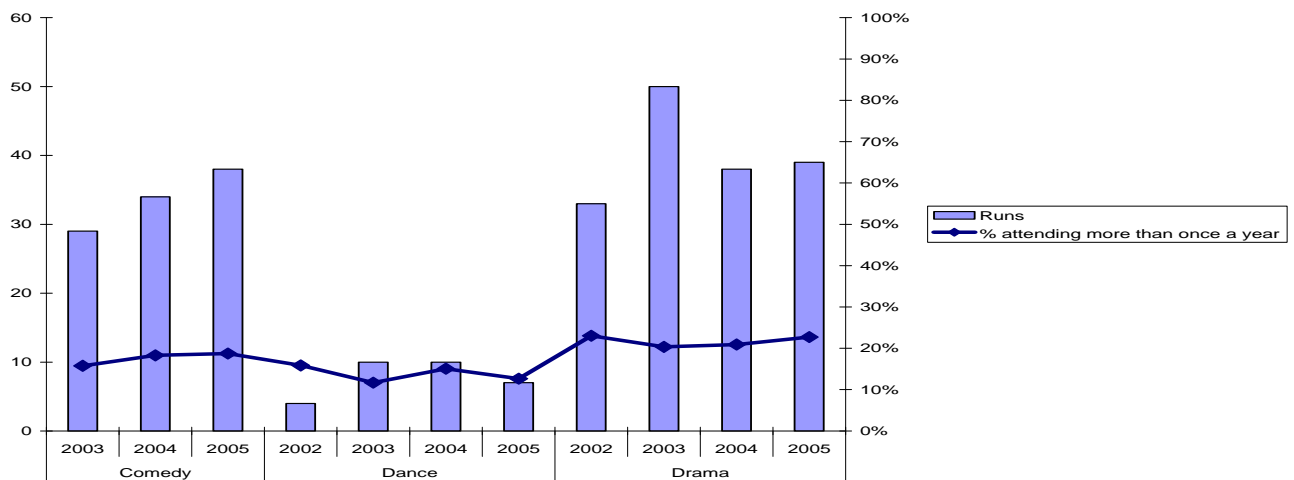
	Have attended all three DTP tours
Research overview	3% - 9%
Data analysis at three venues	1%-4% average 3%
Marketers' perceptions	5%-30% average 12%

**Q: Is their frequency of attendance linked to what dance is programmed?**

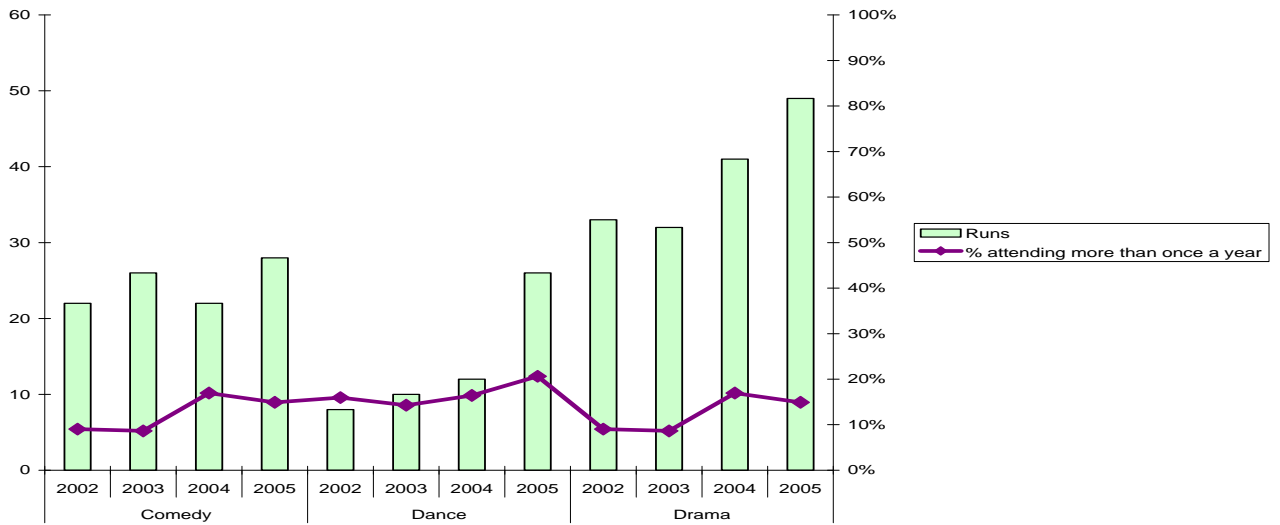
A: Some research makes the assumption that venues with a bigger proportion of frequent attenders have achieved this through the regular programming of dance. Only one piece of research has made specific analysis of a large body of data. It concludes that increasing the number of dance events does not increase frequency but does result in more ticket buyers for dance overall.

The analysis of the three venues backs up this view. There is a slight correlation between an increase in supply and an increase in re-attendance rates, it is not consistent: in some cases a significant increase in the number of productions saw a reduction in the proportion of ticket buyers purchasing more than once a year. Neither is it a linear relationship – if you put on 20% more dance events, there is not a 20% increase in the proportion of reattenders.

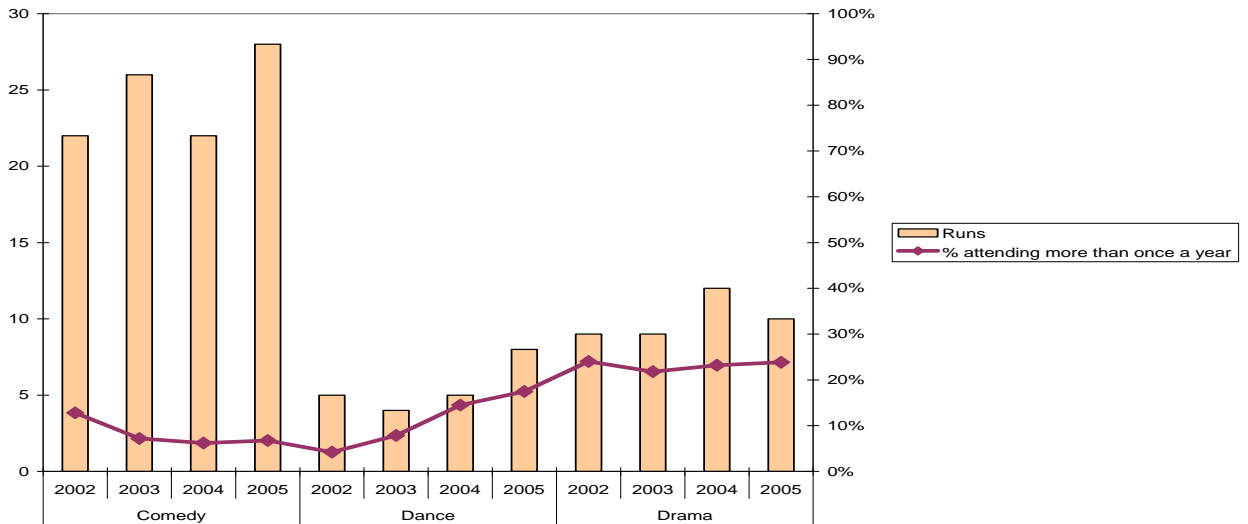
**Warwick: no. of runs per year compared to % of ticket buyers attending more than once a year**



**Lowry: no. of runs compared to % of ticket buyers attending more than once a year**



**Hall for Cornwall: no. of runs compared to % of ticket buyers attending more than once a year**



**Q: What proportion of attenders only visits a venue to see dance?**

A: Only a very few ticket buyers only see dance at a particular venue unless they have only ever bought tickets once at that venue.

	Have bought tickets more than once and only for contemporary dance
Research overview	10%
Data analysis of three venues	2%-4% average 3%
Marketers' perceptions	5%-40% average 20%

Most of the marketers surveyed perceive the majority of their dance audience to be general attenders at their venue. Even so, almost all are overestimating the size of their specialist audience that is only interested in seeing dance.

### 3. Marketing issues

#### Q: What are the most effective communication methods?

A: The Research Overview indicated that word of mouth and the venue brochure are consistently among the top ranking communication methods.

Of course, the response to different communication methods depends on the priorities of each venue's campaign. Venues certainly marketed the Rumble tour differently, choosing to prioritise different tool provided by Dance Touring Partnership according to response rates to previous campaigns, their priority target markets and their perceptions of their overall audience. Seven venues were able to analyse whether ticket buyers had received the season brochure, direct mail with company print/cd or an emailing. For five of them, the season brochure was the most important marketing method. The response varied between venues, ranging from 17% to 80% of ticket buyers with an average of 40%. This was also true for the other marketing communication methods and in some venues marketing methods other than those explored were the most effective:

	Season brochure	Direct mail with company print/cd	Emailings	None of these
Low	17%	2%	1%	14%
High	80%	72%	29%	73%
Average	40%	25%	11%	41%

For most venues, a smaller proportion of Rumble ticket buyers had received the season brochure compared to the selected dance and drama events (40% compared to 41% and 46%)

For most venues a smaller proportion responded to the company print via direct mail compared to the selected dance and drama events (13% compared to 23% and 14%)

The two venues that undertook email campaigns for Rumble and both of the comparative dance and drama events achieved very similar responses for all three campaigns, although the magnitude of these responses was very different (29% / 30% / 30% and 8% / 9% / 8%)

Response rates for all three marketing communication methods examined for the Rumble tour varied considerably between venues:

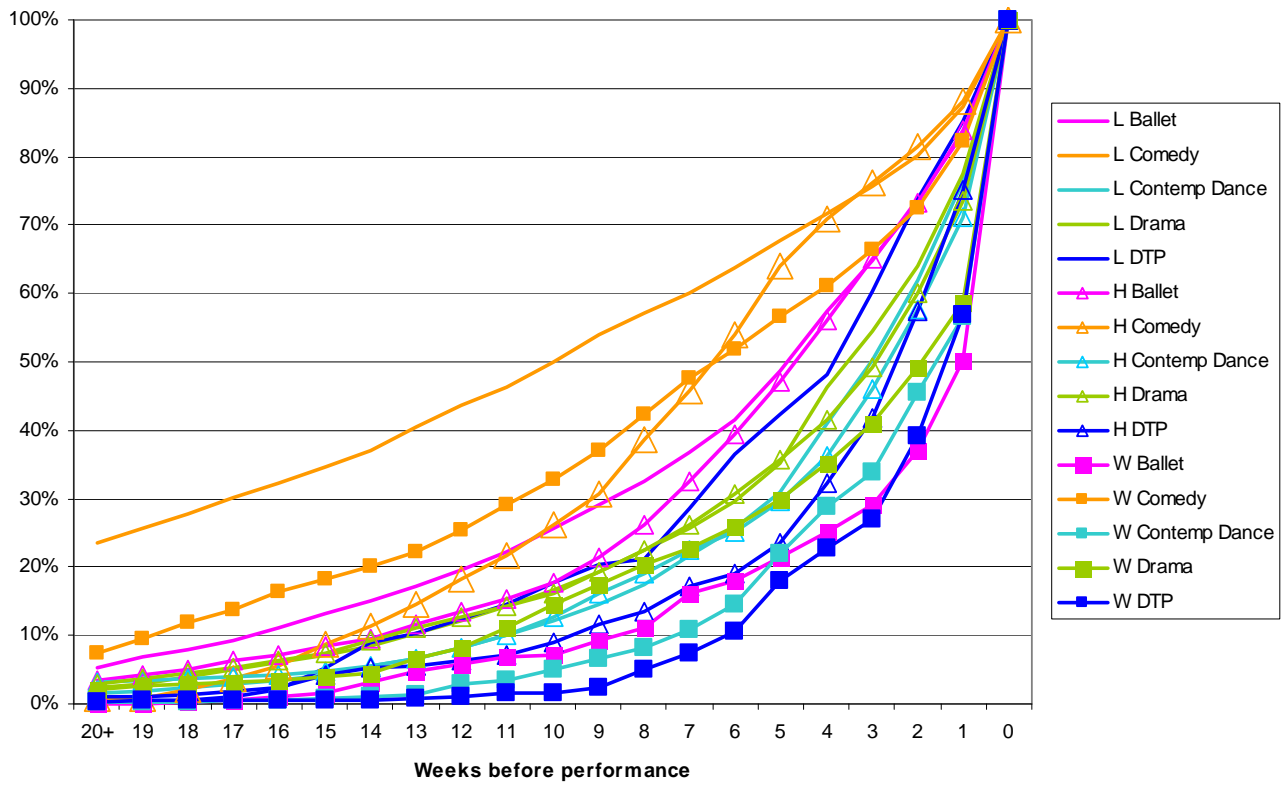
	Season brochure			Direct mail with company print			Emailings		
	<i>Rumble</i>	<i>Other Dance</i>	<i>Drama</i>	<i>Rumble</i>	<i>Other Dance</i>	<i>Drama</i>	<i>Rumble</i>	<i>Other Dance</i>	<i>Drama</i>
High	0.9%	2.5%	2.6%	14.5%	6.1%	7.9%	1.0%	2.1%	2.1%
Low	0.1%	0.1%	0.0%	0.9%	0.7%	0.0%	0.2%	0.0%	0.0%
Average	0.4%	0.7%	0.7%	3.3%	2.9%	3.3%	0.7%	0.6%	0.7%

#### Q: When do they buy their tickets?

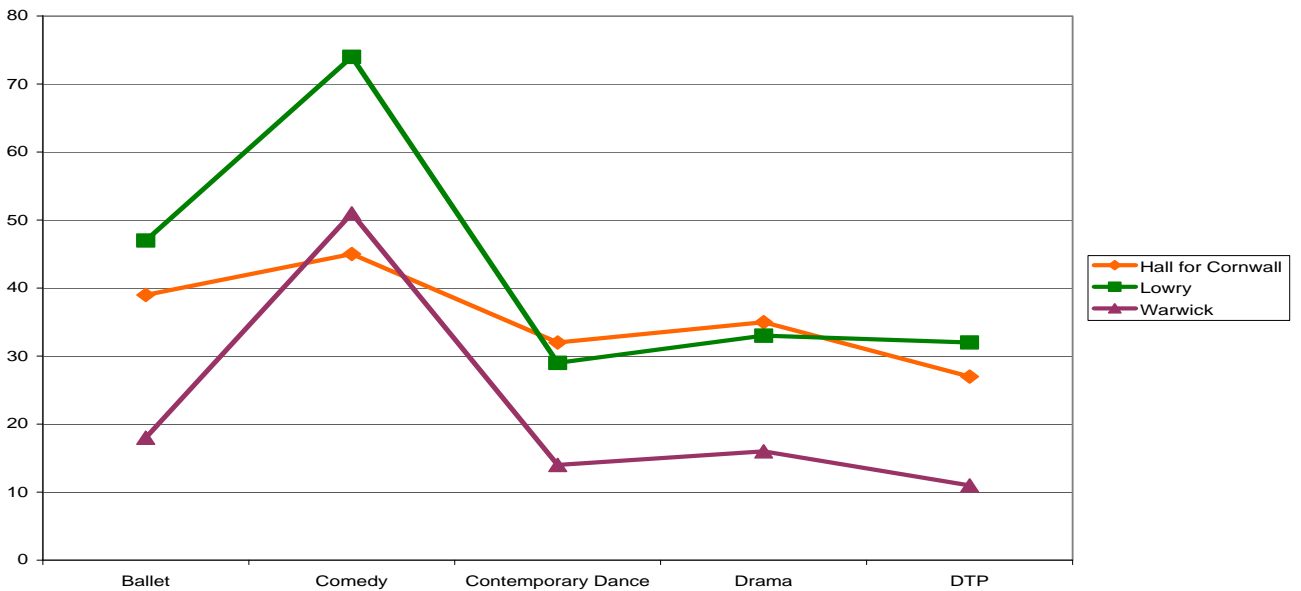
A: There are distinct venue trends and artform trends. Each venue has its own pattern of booking patterns with a tendency for attenders to book earlier for The Lowry and later for Warwick Arts Centre.

In all three venues, comedy consistently sells well in advance of other art forms and there is a strong similarity between contemporary dance and drama booking periods.

**Cumulative ticket sales**



**Average no. of days tickets were booked in advance**



**Q: Does it cost more to attract a dance audience?**

A: Six venues were able to calculate the marketing spend per ticket sold for Rumble and the comparative dance and drama events. In four, the spend per ticket for Rumble was lower than both the other events. In one, it was higher than both other events and in the remainder, the spend per ticket for the other dance event was lower but for the drama event it was significantly higher.

	Rumble	Other Dance	Drama
High	£2.06	£2.91	£9.28
Low	£0.07	£0.19	£0.27
Average	£1.21	£1.25	£3.10

## Participating venues

Analysis of key sales and marketing data for the Dance Touring Partnership tour of Rumble at 15 venues

	Tickets sold	Data capture rate	% tickets sold
Theatre Brycheiniog, Brecon	391	99%	82%
Courtyard, Hereford	389	100%	93.1%
Gardner Arts Centre	894	96%	96.3%
Hall for Cornwall, Truro	934	-	100%
Lighthouse, Poole	642	-	96.5%
MacRobert, Stirling	398	97%	86.7%
Nottingham Playhouse	1251	100%	87.9%
Queen Elizabeth Hall, London	1605	72%	89.1%
Sheffield Theatres	1564	-	73.3%
South Hill Park Arts Centre	300	97%	75.4%
The Lowry, Salford	790	99%	89.6%
Wales Millennium Centre	2755	100%	80.6%
Warwick Arts Centre	462	100%	93.0%
Wycombe Swan, High Wycombe	1343	97%	69.8%
Wyvern Theatre, Swindon	540	100%	87.8%

Analysis of box office data for ticket buyers for Dance Touring Partnership events, all other contemporary dance, ballet, drama and comedy in 2004 and 2005 at Hall for Cornwall, The Lowry and Warwick Arts Centre.

### Detailed system figures for calendar 2004 and 2005

#### Hall for Cornwall

Artform	Avg Tickets	Avg capacity	No perfs	Total ticket sales
Comedy	530	62%	9	4770
Drama	452	56%	22	9944
Ballet	781	86%	5	3905
Contemporary Dance	493	66%	10	4930
DTP	688	78%	3	2064

#### Lowry

Artform	Avg Tickets		No perfs	Total ticket sales
Comedy	652		67	43,684
Drama	410		536	219,760
Ballet	868		63	54,684
Contemporary Dance	514		65	33,410
DTP	557		2	1,114

#### Warwick Arts Centre

Artform	Avg Tickets	Avg Capacity	No perfs	Total ticket sales
Comedy	458	85%	103	47,174
Drama	197	60%	395	77,815
Ballet	126	24%	6	756
Contemporary Dance	248	73%	28	6,944
DTP	368	77%	4	1,472