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Dance Touring Partnership
Research into Audiences for Dance
Summary Report

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Contents

1 Introduction

This project began by asking participating marketing managers to describe their dance audiences. Their responses were compared to the results of research into dance over the past ten years and with the results of analysis into audiences for the first of the Dance Touring Partnership (DTP). Most thought audiences for dance were significantly younger, attended dance more frequently, were more loyal to particular companies and were willing to travel further than they were in reality.

This inaccurate perception of the nature of dance audiences has a significant impact on the effectiveness of marketing campaigns. The purpose of the project was to build a better picture of audiences and to encourage programmers and marketers in the participating venues to adapt their practice accordingly.

1.1 Methodology

The project consisted of two years of action research. It involved working with marketers at Dance Touring Partnership member venues to research audiences across three tours, compare them with audiences for other types of event and explore the practical implications of the findings for audience development. The research focused on answering a series of questions about their audiences developed by the participating venue marketers. It consisted of:

- Analysis of data capture and integrity at four venues. This involved a manual analysis of 7,560 customer records, a sample of 1.5% of the total records held by those venues.
- An assessment of the marketing managers' tacit knowledge of dance audiences
- A digest of research into audiences for dance carried out over the past 10 years (see separate document)
- Detailed analysis of customer booking data at three venues to explore audience cross over, frequency, loyalty and drivetime for a range of artforms including dance. This analysis looked at ticket buyers for ballet, contemporary dance, comedy, drama and DTP productions between 2002 and 2005.
- An analysis of information about three DTP tours from all venues to compare with a benchmark and with comparable information about another dance event and a drama event selected from the same season. These tours were:
  - Renegade in *Rumble*
  - Stan Won't Dance in *Revelations*
  - Ultima Vez in *Spiegel*
- Research into emarketing practice through a mystery shopper survey at all DTP venues
- A copywriting training day

The venues that participated in at least one element of the research project were:

- Courtyard, Hereford
- Gardner Arts Centre, Brighton

- Hall for Cornwall, Truro
- Laban Centre, London
- Lighthouse, Poole
- Lowry, Salford
- Lyceum Theatre, Sheffield
- MacRobert, Stirling
- Nottingham Playhouse
- Oxford Playhouse
- Queen Elizabeth Hall, London
- Roses Theatre, Tewkesbury
- South Hill Park, Bracknell
- Theatr Brycheiniog, Brecon
- Wales Millennium Centre, Cardiff
- Warwick Arts Centre
- Wycombe Swan, High Wycombe
- Wyvern Theatre, Swindon

2 Key Findings

- Analysis of customer records gives us a good picture of what our audiences are like because venues have relatively few duplicate records and a high level of accurate data capture.
- Most dance attenders are not interested in dance per se
- On the whole, audiences for dance are like the overall audience at the venue. For example, the age profile of audiences varies considerably between venues and between tours
- The existing customer database is the best source of new audiences for dance
- Effective marketing strategies and tactics differ widely from venue to venue and show to show so it is essential that marketers find out what works for their audiences and their programme and keep checking it out
- A great deal of research into dance audiences has been carried out over the past ten years but programmers and marketers are not necessarily thinking through its implications. A typical example is that the research repeatedly shows that four out of five dance bookers attend less often than once a year, however venues continue to programme dance seasons that effectively spread a small audience very thinly

3 How reliable is the picture of dance audiences we get from box office data?

There are relatively few duplicate records and a high degree of accurate data capture which means that analysis of customer records gives us a good picture of what our audiences are like.

Four venues supplied audience data to be assessed for completeness, consistency and duplicates.

The percentage of definite duplicate records ranged between 0.6% and 2.5% of the total records.

On average, 97% of the sample records had a first name or initial. All but one venue was relatively consistently collecting either full first names or initials to enable efficient de-duplication. Even so, a proportion did not have consistent first name information to enable duplicates to be definitely identified. These were analysed as possible duplicates and ranged between 0.01% and 1.3% of the total records. The proportion of addresses with ticketing histories for different members of the same household was also relatively low, ranging from 1.1% to 3.2%. On average for the four venues, the records which could be regarded as misleading totalled 3.9%. This is within acceptable limits.

The data held on box office computer systems that forms the basis for this analysis is for ticket buyers rather than attenders which could lead to a misleading profile of audiences. Research commissioned from Cultural Intelligence by ADUK[1] identified that the profile of non-bookers (ie those who attended but did not buy their own tickets) to be very similar to that of advance bookers. Walk-up bookers whose data is not captured make up only 2% of all box office transactions. 84% of advance booker respondents said that they take responsibility for booking tickets most of the time or always

Although not used primarily for data housekeeping, the proportion of records with phone numbers was also assessed.[2] Across the four venues, between 78% and 84% of records had full phone numbers. It was generally agreed that there is some room for improvement here.

4 What is the profile of the audiences attending DTP events?

4.1 How old are they?

The age profile of audiences varies considerably between venues and between tours

Discount types were used as an indicator of the age profile of attenders. There were considerable differences between the venues for each tour and between tours, particularly between the proportions of discounts targeted at under 24s.

Table 1: Educational plus Child plus Student discounts

[1] Download the full report entitled *Walkup, Advance bookers and Non-bookers* from http://www.aduk.org

[2] Phone numbers are used for contacting customers in case of problems with bookings or when performances are cancelled.

	Renegade	Stan Won't Dance	Ultima Vez
High	62%	66%	43%
Low	31%	13%	2%
Average	52%	46%	31%

Table 2: Senior Citizen discounts

	Renegade	Stan won't dance	Ultima Vez
High	4%	12%	6%
Low	0%	1%	3%
Average	2%	5%	5%

Figure 1: Renegade - percentage of tickets sold at each discount type

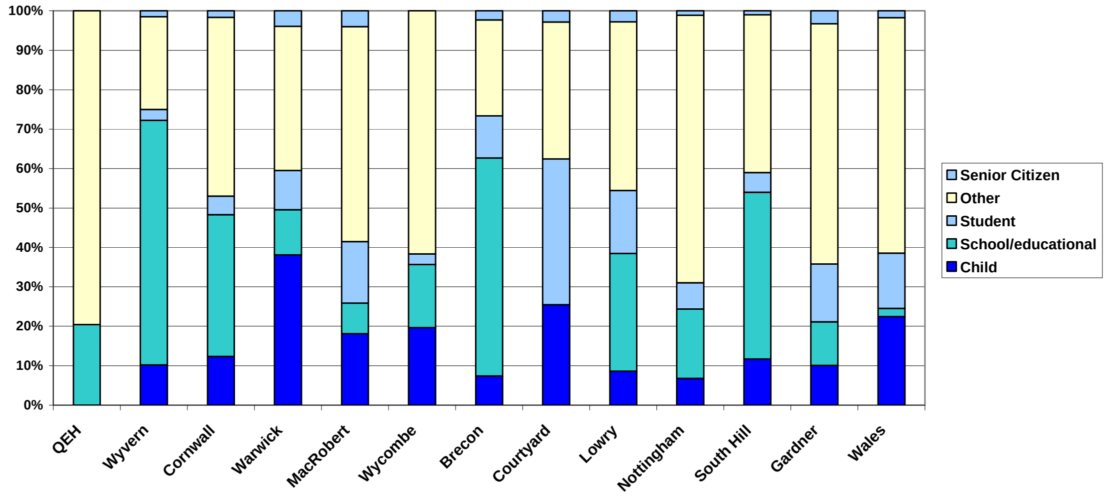


Figure 2: Stan Won't Dance - percentage of tickets sold at each discount type

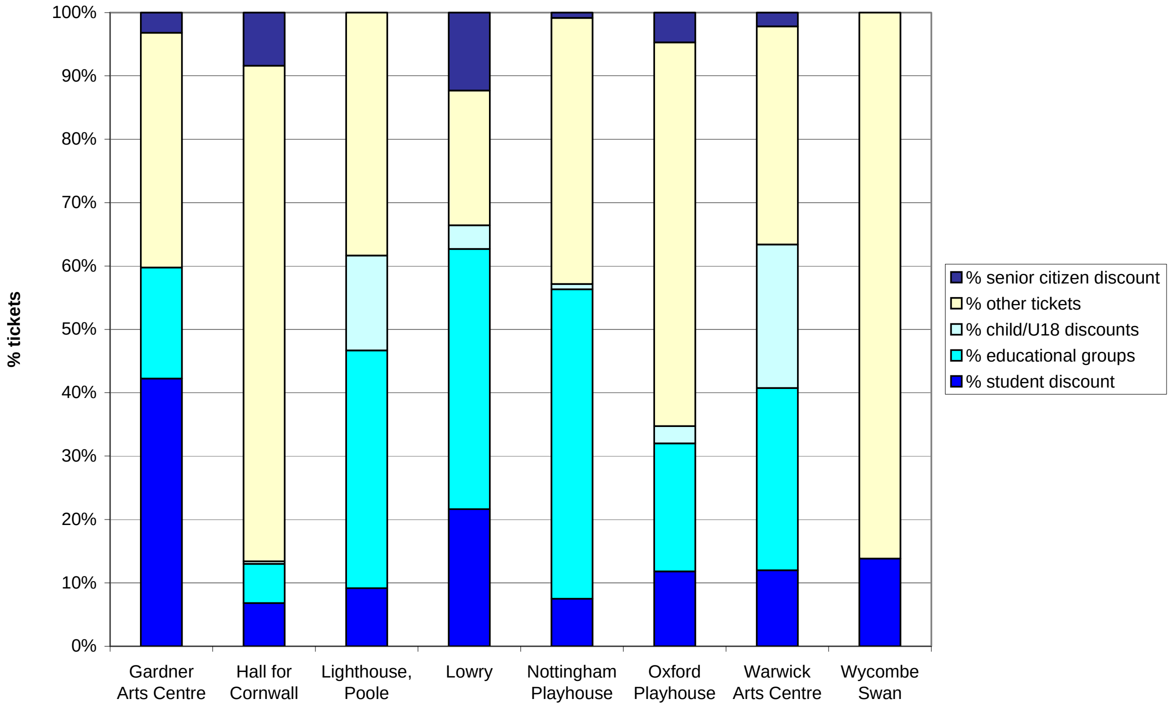
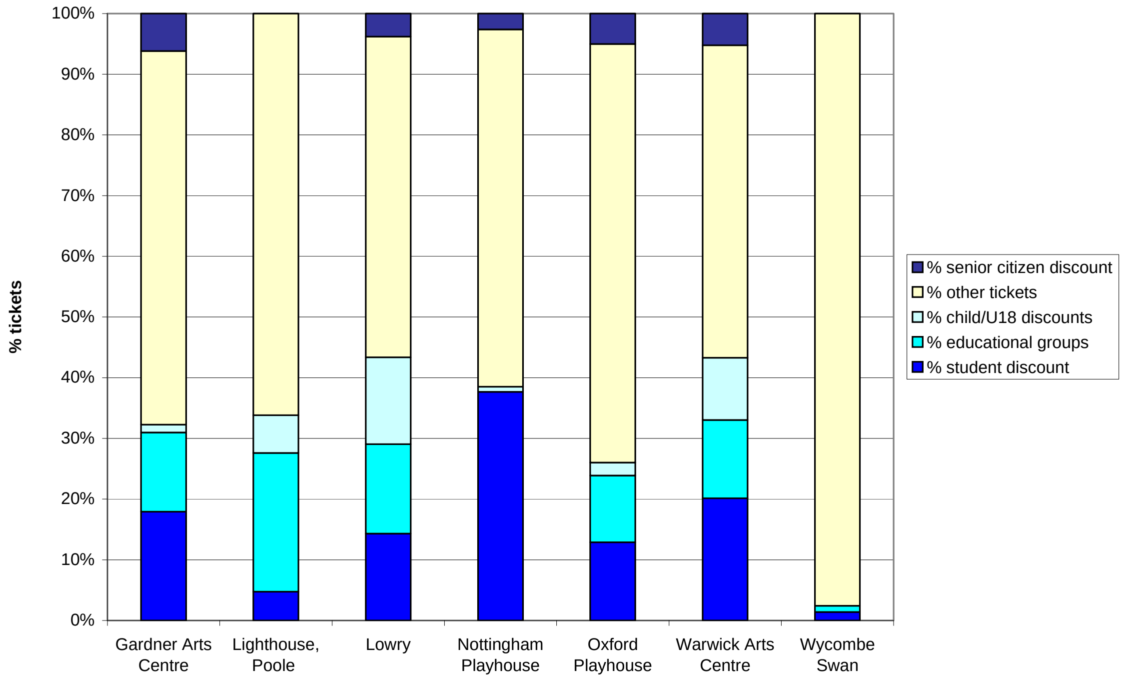


Figure 3: Ultima Vez - percentage of tickets sold at each discount type



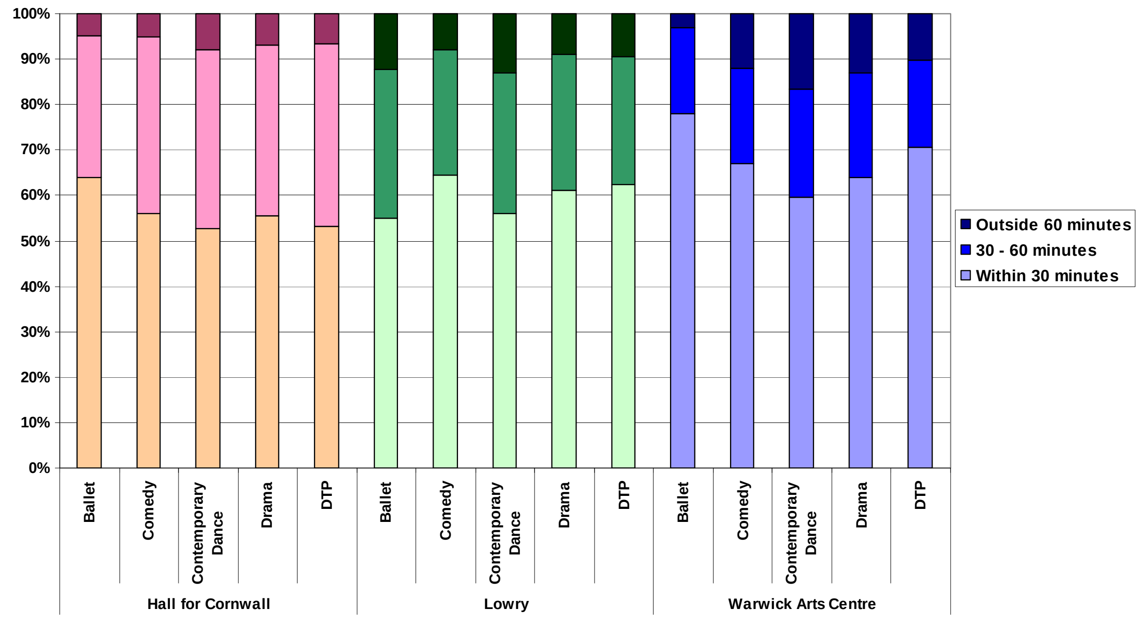
4.2 Where do they live? (drivetime)

Between 52% and 70% of ticket buyers for DTP events came from within a 30 minute drivetime. Between 8% and 10% of ticket buyers travel for more than an hour. Ticket buyers are slightly more likely to travel for more than 30 minutes and more than 60 minutes for contemporary dance than for other artforms.

Between 40% and 50% of ticket buyers for contemporary dance at the three venues participating in the in-depth data analysis came from outside a 30 minute drivetime. This is slightly more than for other artforms. DTP events attracted the same or a slightly smaller proportion of ticket buyers from outside a 30 minute drivetime than other contemporary dance events.

Some artforms attract more people from further away but there is no consistent pattern between venues eg compared to the other artforms, ballet attracts fewest people from outside a 30 minute drivetime at Warwick Arts Centre and Hall for Cornwall, but at the Lowry it attracts the biggest audience from outside 30 minutes.

Figure 4: Ticket buyers by drivetime



4.3 Do they come in groups?

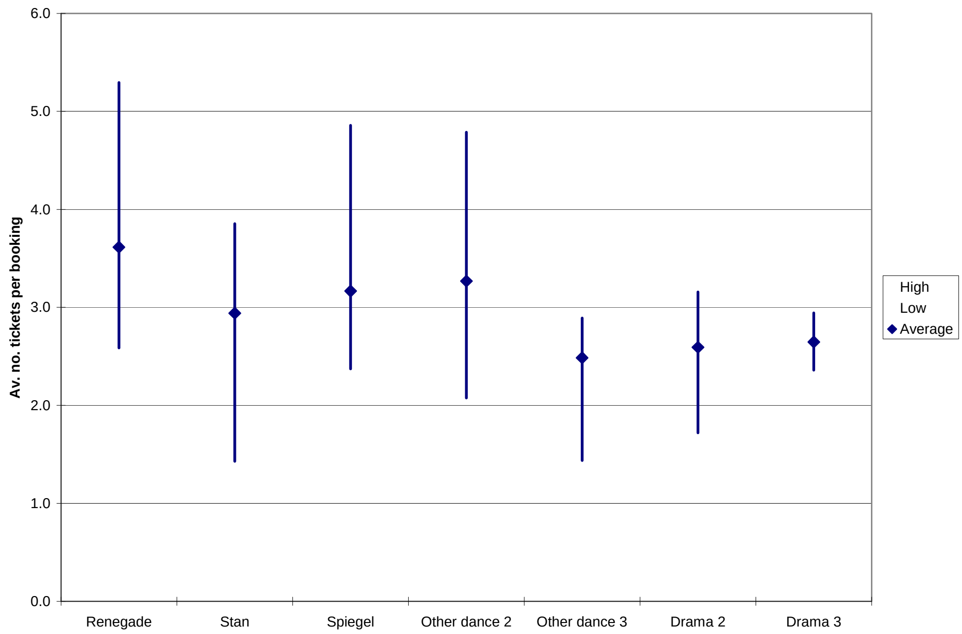
Average party size differs considerably between venues and between DTP tours. This reflects the very different proportion of sales to groups, particularly school groups.

Renegade attracted higher proportions of group bookings across all venues, as indicated by the higher average number of tickets per booking. The variation between venues is considerable, even so, ranging from 2.6 tickers per booking to 5.3. DTP events attracted more group bookings than most but not all of the comparable dance and drama events.

School groups for Renegade ranged from zero to 62% of attenders, for Stan Won't Dance they ranged from 6% to 49% and for Ultima Vez they ranged from 1% to 23%. The large variation seems to be a factor of:

- the timing of performances (eg performances during school holidays and on Fridays and Saturdays attracted small numbers of school bookings)
- the venues' general relationship with schools (for each venue compared to the others, the range of school groups across DTP productions and comparable dance and drama events is roughly the same)
- the importance of school groups within each event's marketing campaign plan

Figure 5: Maximum, minimum and average party size (the top of each line represents the maximum party size across the venues for each tour, and the bottom the minimum)



It would be simplistic, however, to say that some venues are better at getting school and group bookings than others as for each DTP tour a different venue has the highest average party size. This is also the case for the comparator dance and drama events.

Table 3: Average party size by venue

	Stan	Spiegel	Other dance	Other dance	Drama 2	Drama 3
Gardner Arts Centre	2.7	2.4	3.6	1.4	1.7	2.4
Hall for Cornwall	3.3					
Lighthouse, Poole	3.3	3.5	4.8		2.5	
Lowry	1.4	2.8	3.8		2.6	
Nottingham Playhouse	3.9	2.7	2.9	2.8	2.5	2.9
Oxford Playhouse	3.1	2.5	2.1	2.9	2.5	2.4
Warwick Arts Centre	3.1	4.9			3.1	
Wycombe Swan	2.8	3.4	2.5	2.8	3.2	2.9

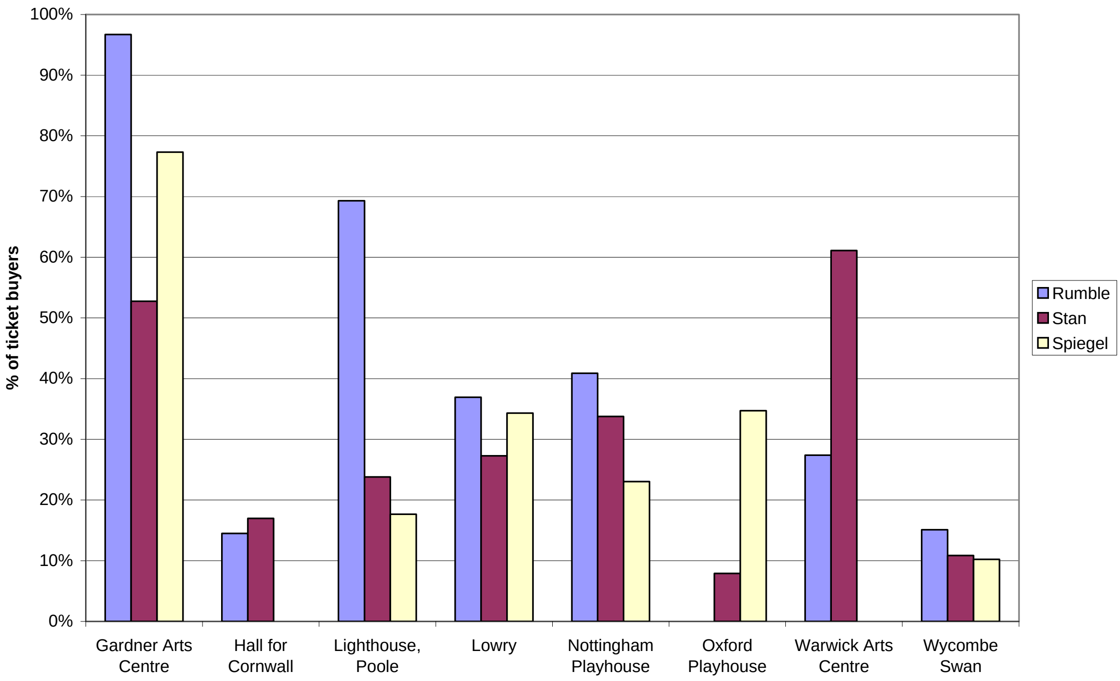
Highest average party size
Above average party size

4.4 What proportion of the audience are first time attenders?

The percentage of first time ticket buyers varies between venues and between productions, although in several venues the DTP tours attract more than the comparator contemporary dance and drama events

Gardner Arts Centre achieved high proportions of first time ticket buyers for all DTP tours and the comparator contemporary dance and drama productions. A relatively low data capture rate in the past means these figures may be inflated so the venue has been omitted from the second of the charts below.

Figure 6: Percentage of ticket buyers for DTP tours who have not previously purchased tickets at the venue



4.5 Do DTP events attract a new, crossover and young audience, as we believe?

In most venues, the DTP events attracted a higher proportion of first time ticket buyers than the comparator dance and drama events. In some venues, a greater proportion of the tickets were sold at child, educational and student discounts for particular DTP tours than for the other artforms or events analysed. On the whole, though, this depends on the particular DTP production and the dance and drama events chosen for comparison.

At venues such as Hall for Cornwall, Warwick Arts Centre and Wales Millennium Centre, particular DTP events attracted significantly larger audiences aged 16-24 as indicated by the proportion of tickets sold at the relevant discounts. Other venues, like Gardner Arts Centre, attract audiences from these age categories as a matter of course. Clearly, some of the comparator dance and drama events were specifically targeted at young people and outperform the DTP events in the same season in terms of the proportion of the relevant discounted tickets sold.

Figure 7: Tickets sold at child, educational and student discounts by artform in 2005

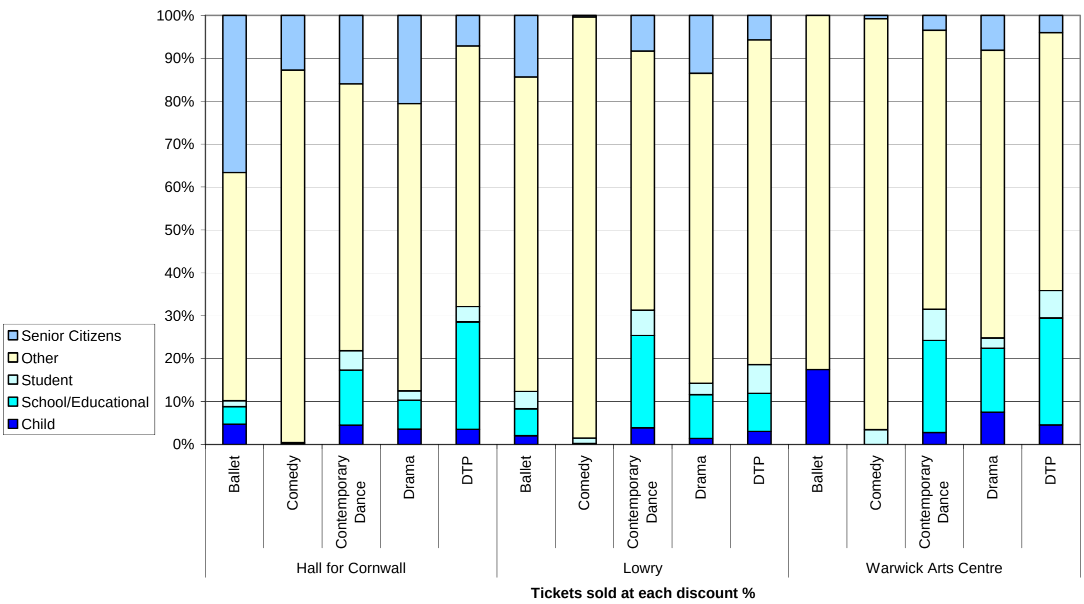
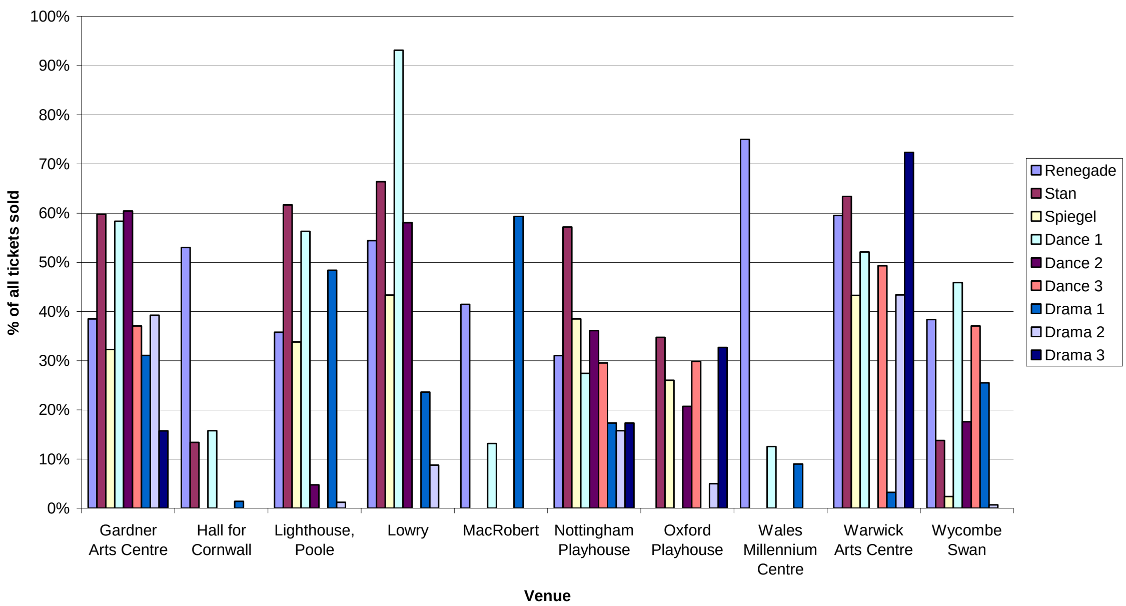
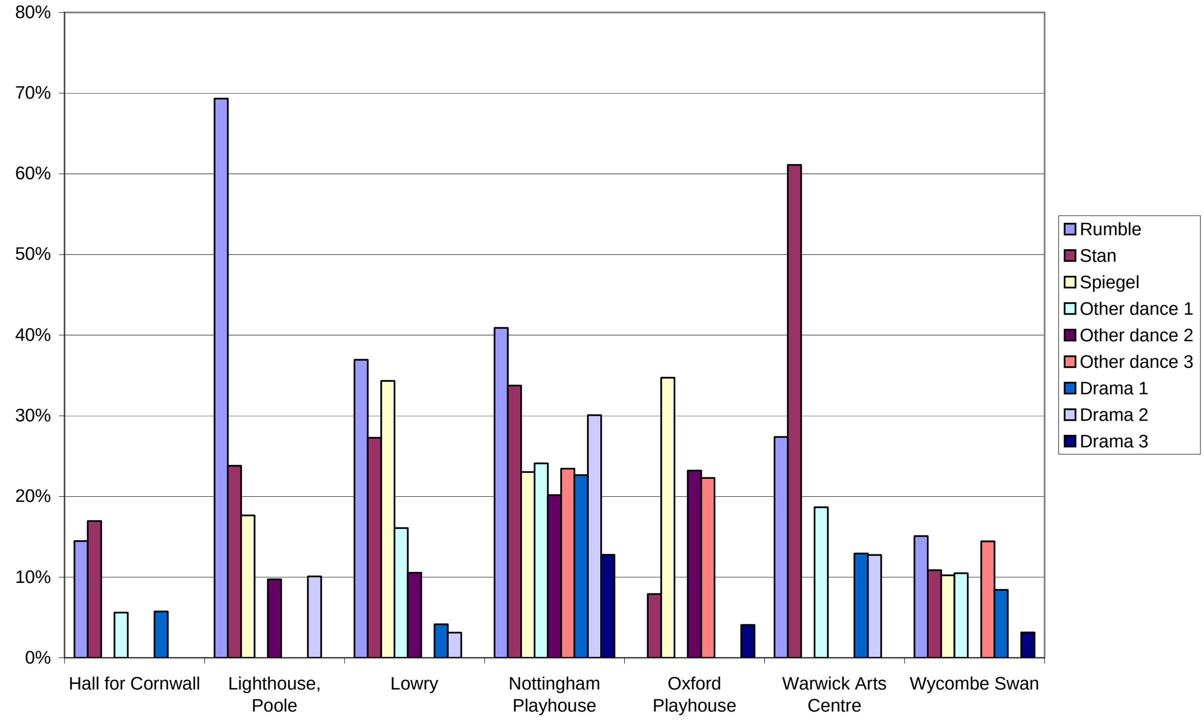


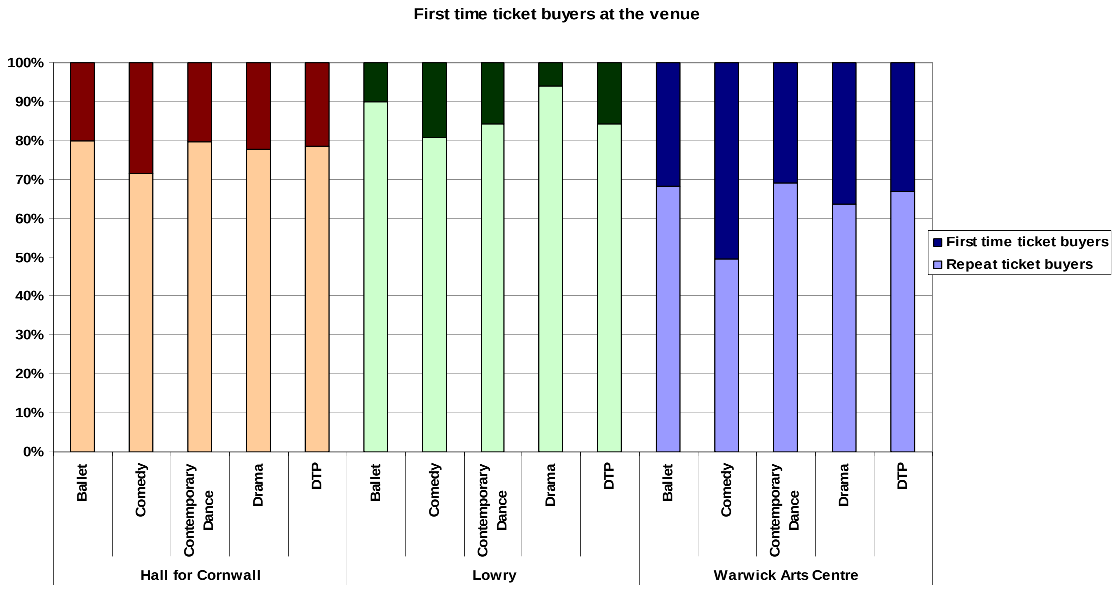
Figure 8: Tickets sold at child, educational and student discounts for DTP tours and the comparator drama and dance events



The DTP tours do attract a higher percentage of first time ticket buyers than the comparator events in most, but not all, of the venues. Comedy consistently attracted a higher proportion of new ticket buyers than all other artforms in the venues analysed in depth.

Figure 9: Percentage of ticket buyers who have not previously purchased tickets at the venue





4.6 Does frequency of attendance at dance depend on what is programmed?

At the most, one in five ticket buyers buy tickets for more than one dance event a year. There is no link between the number of dance productions programmed each year and the proportion of ticket buyers purchasing for more than one event per year.

The proportion of ticket buyers attending more often than once a year is not affected by increases or decreases in the number of dance productions programmed.[3] If fact, increases can be associated with a decrease in ticket buyers attending more than once, and decreases with an increase in frequency of attendance.

Figure 10: Hall for Cornwall - Number of runs (productions) compared to the percentage of ticket buyers purchasing for more than one event per year

Figure 11: Lowry - Number of runs (productions) compared to the percentage of ticket buyers purchasing for more than one event per year

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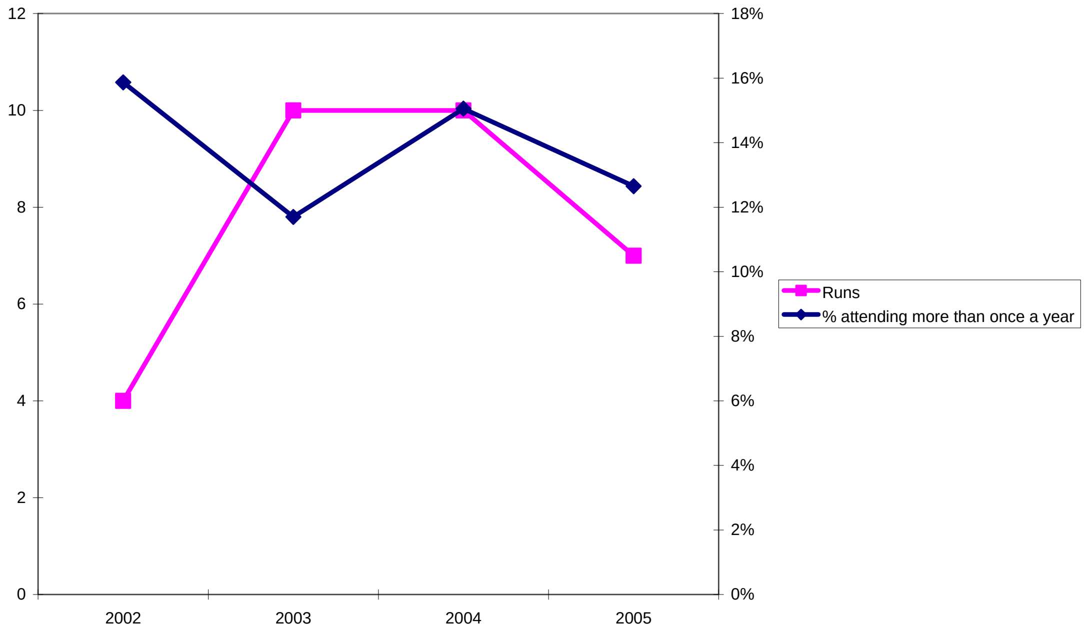
[3] The number of productions, ie runs of performances of the same event was analysed, because this is an indicator of an increase in choice. An increase in the number of performances of the same production may increase the availability of a production to a particular customer but doesn't offer an increase in choice as it is unlikely that a ticket buyer will come and see the same production twice.

Figure 12: Warwick Arts Centre - Number of runs (productions) per year compared to the percentage of ticket buyers purchasing for more than one event per year



This is also the case for other artforms with increases or decreases in the number of productions often having the opposite effect on the proportion of ticket buyers purchasing for that artform more than once a year.

Figure 13: Warwick Arts Centre - no of runs per year compared to % ticket buyers attending more than once a year across different artforms

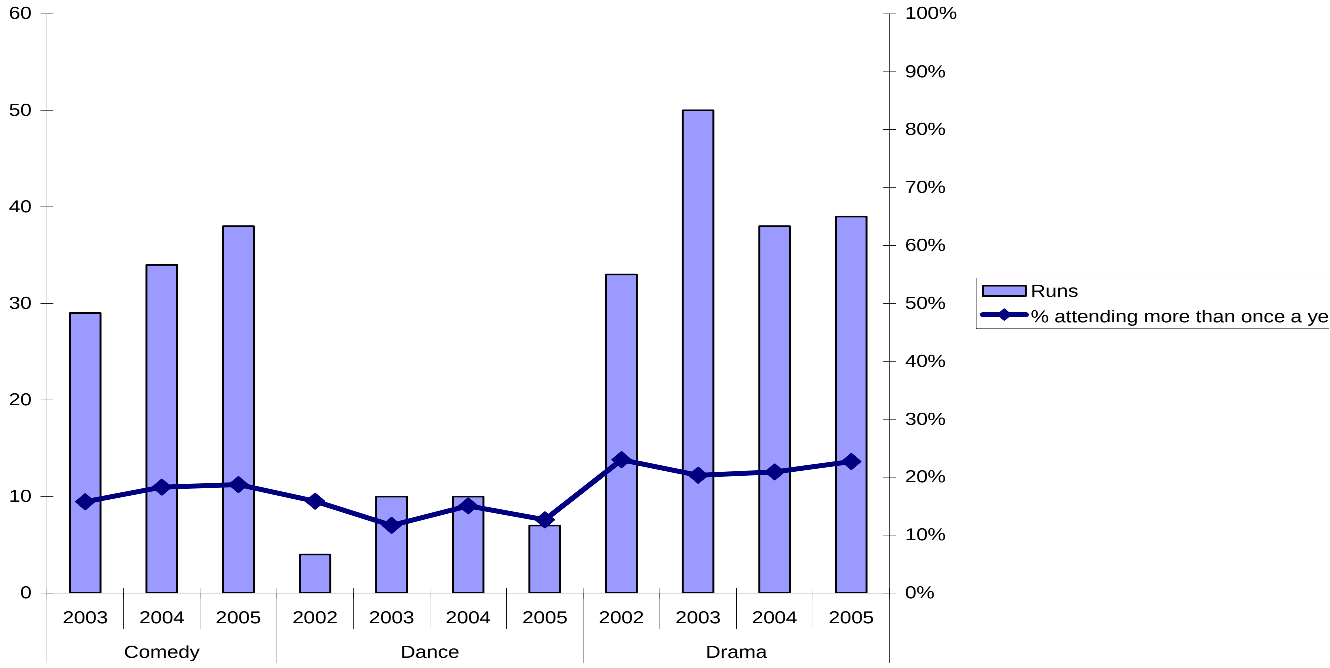


Figure 14: Lowry - - no of runs per year compared to % ticket buyers attending more than once a year across different artforms

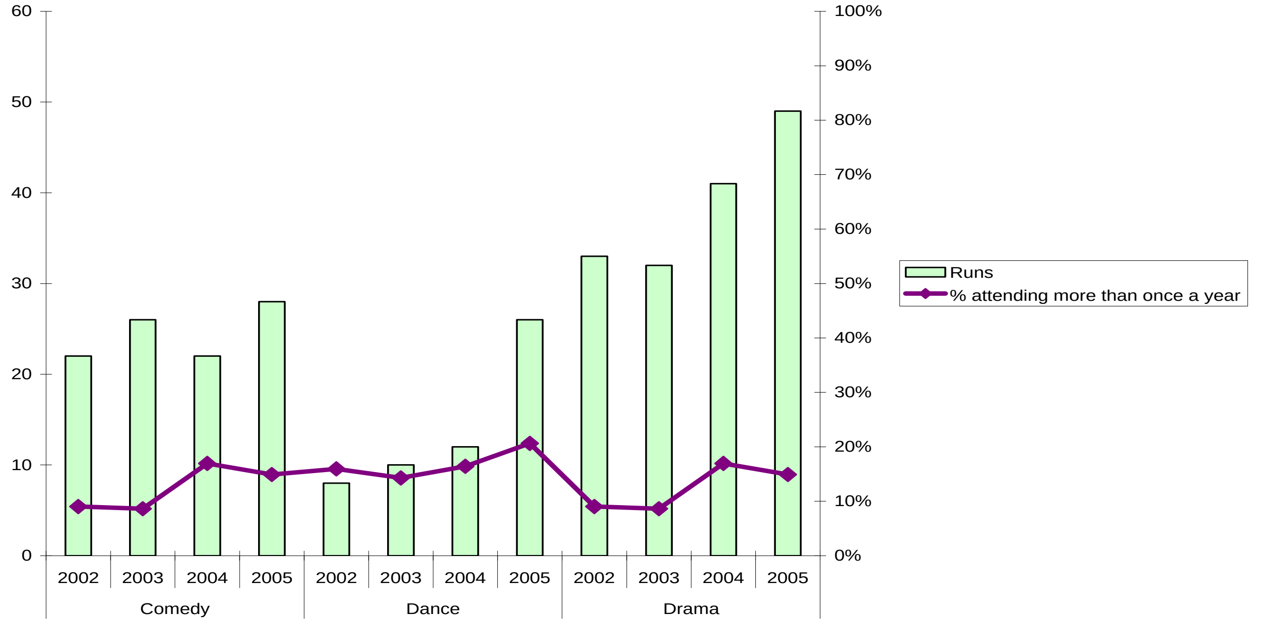
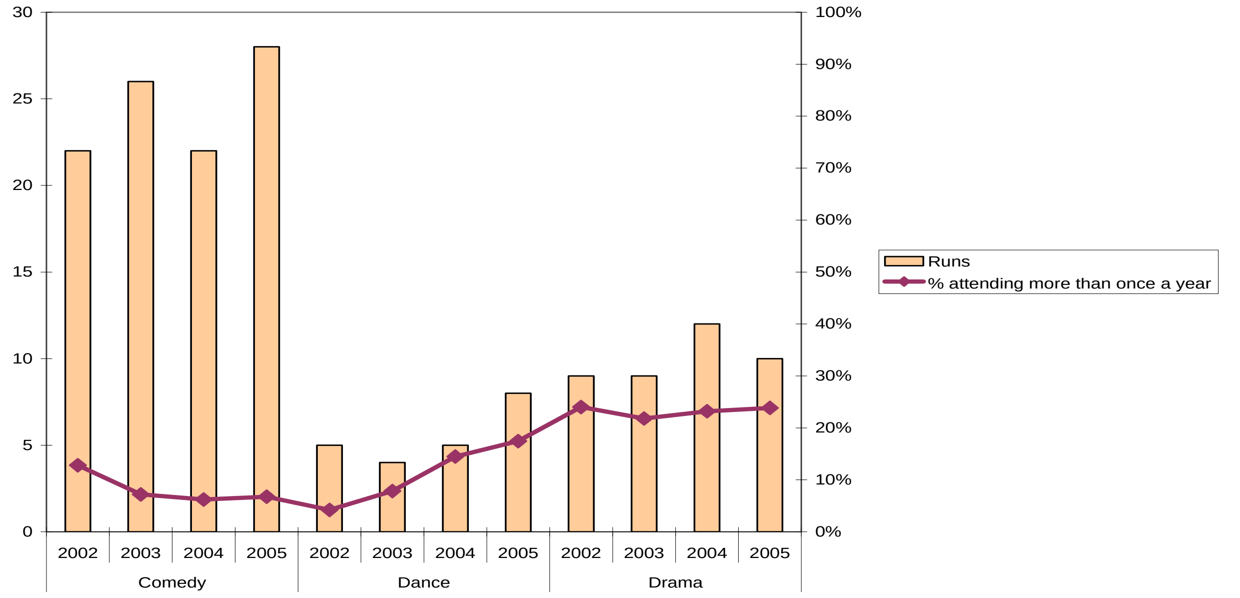


Figure 15: Hall for Cornwall - - no of runs per year compared to % ticket buyers attending more than once a year across different artforms



4.7 How big is the specialist dance audience?

2% – 4% can be classified as dance enthusiasts as they have bought tickets at the venue more than once and only bought for dance. The biggest challenge for all venues is to get first time ticket buyers to return.

2% – 4% have bought tickets at the venue more than once and only bought for dance. 50% - 70% have bought for non dance events at the venue. The remainder have only bought tickets once at the venue.

This is the case for all the artforms analysed at the three venues whose audience data was explored in depth, even over several years:

Table 4: % of bookers buying for more than two events in the last four years, but only for one art form

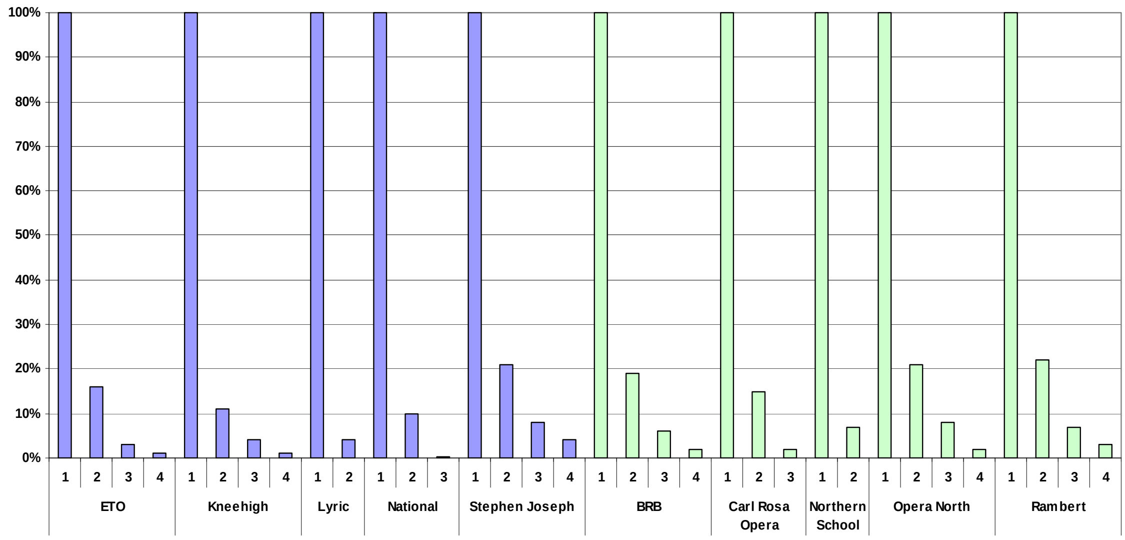
Venue	% of all ticket buyers
Hall for Cornwall	2%
Lowry	5%
Warwick	4%

4.8 Are audiences loyal to particular companies

No more than one in five ticket buyers come back to see a company on subsequent visits, whatever the artform. Between 11% and 25% of ticket buyers saw more than one DTP tour. 1% - 3% bought tickets for all three DTP tours the venue hosted

At most, one in five ticket buyers for a particular touring company return and see that company the next time it visits the venue, regardless of the venue, company or the artform.

Figure 16: Proportion of ticket buyers returning to see a touring company on each subsequent visit to the venue



4.9 When do they buy their tickets?

DTP tours had a slightly later booking pattern than other artforms in two out of the three venues analysed in depth. The difference, however, is not great enough to be significant.

Booking patterns vary between venues, although people buy tickets for comedy events earlier than for the other artforms in all three venues. Ballet books earlier than the other artforms except comedy at the Hall for Cornwall and the Lowry but later at Warwick Arts Centre. At Warwick Arts Centre, more ticket buyers purchase in the week of the performance for all artforms except comedy than at the other two venues.

Figure 17: Hall for Cornwall - Advance booking patterns by artform

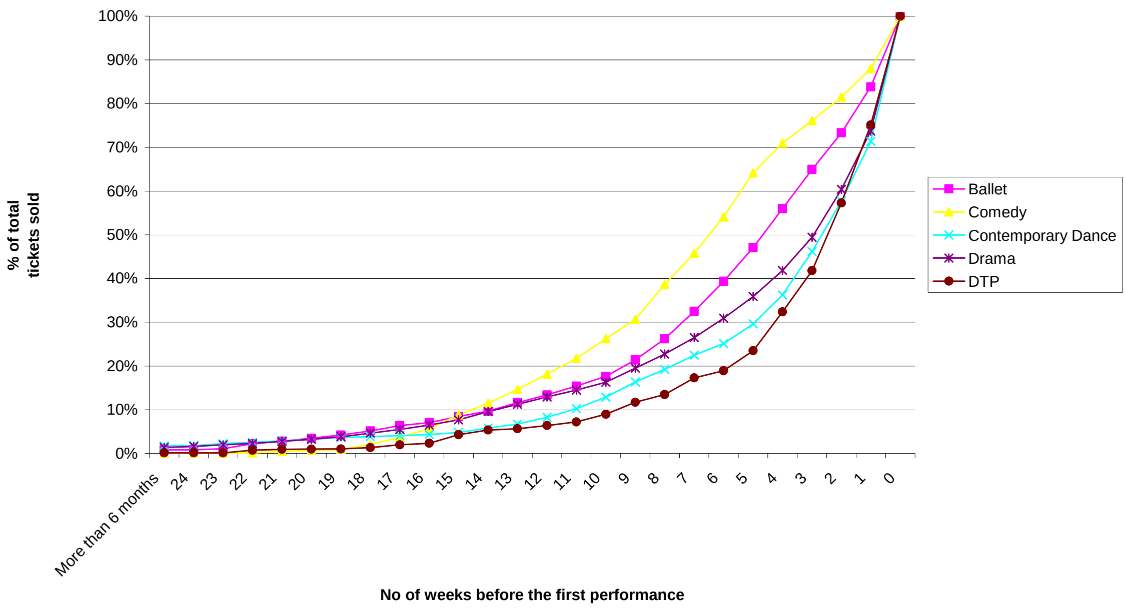


Figure 18: Lowry - Advance booking patterns by artform

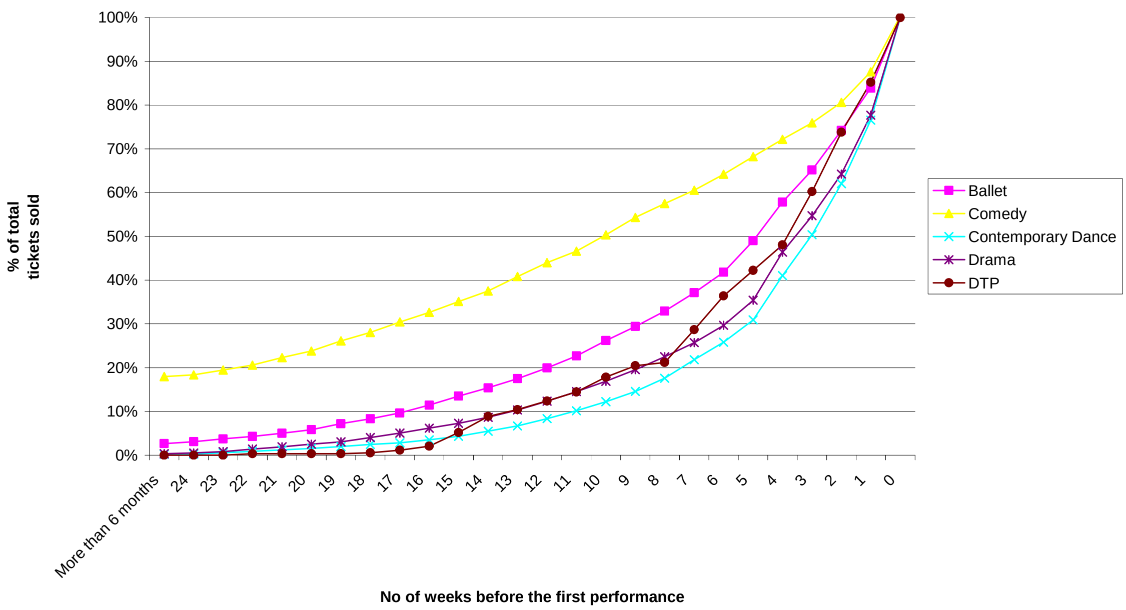


Figure 19: Warwick Arts Centre - Advance booking patterns by artform

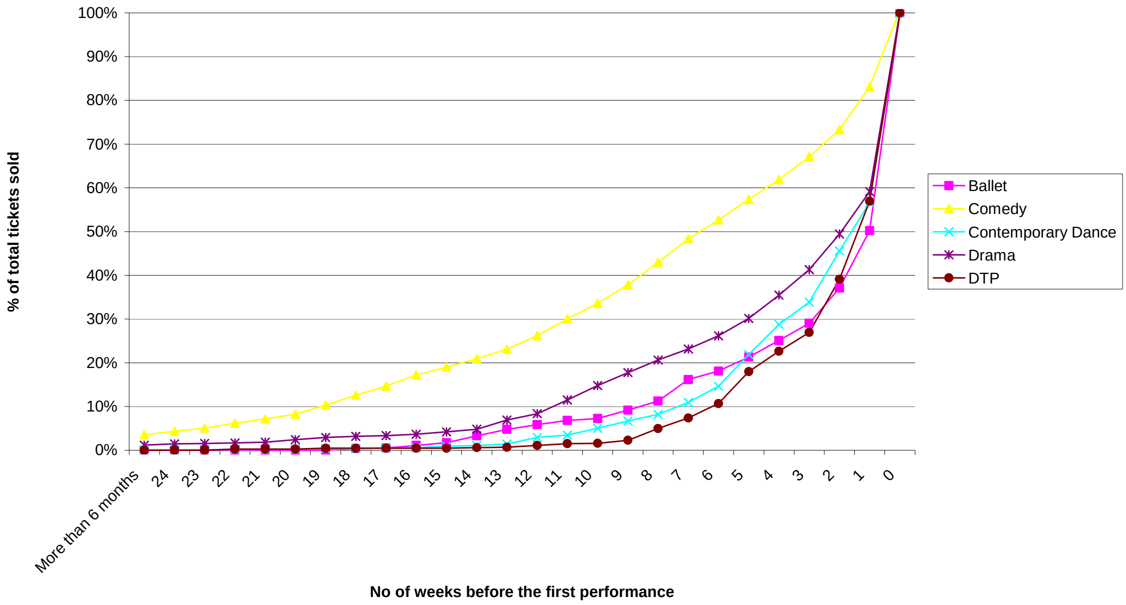
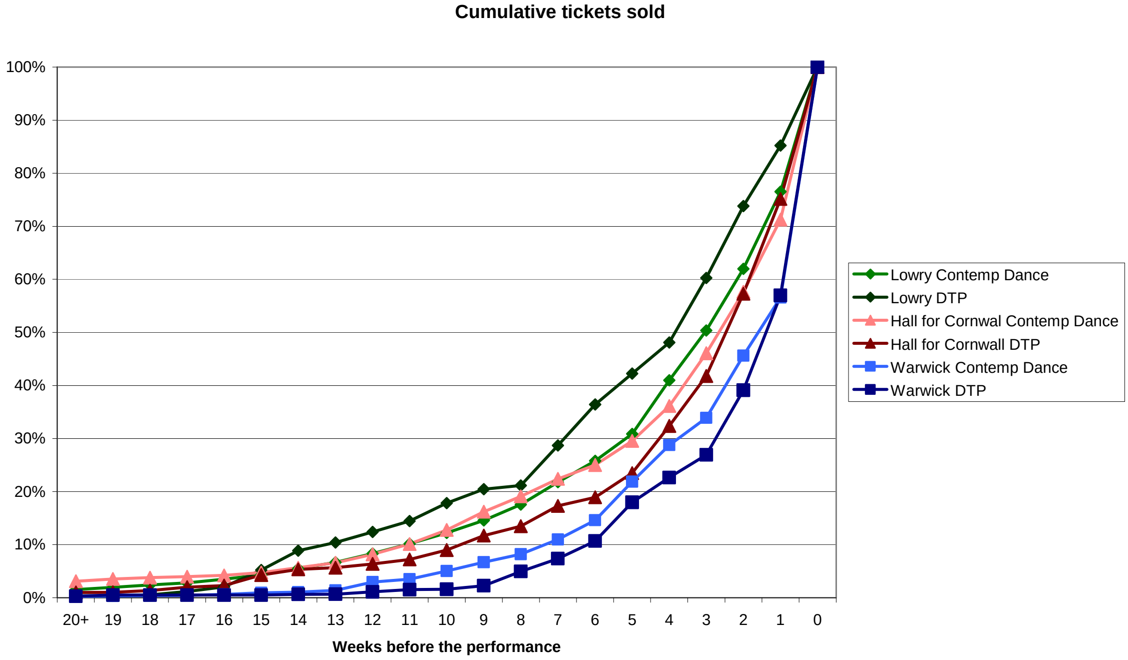


Figure 20: Comparison of booking patterns for contemporary dance and DTP



5 How effective is our marketing?

5.1 How did we do?

Just as with other types of event, there is significant variation between venues in the percentage ticket sales for the same tour.

Some venues appear to achieve lower sales than others for most of the events analysed. In some but not all cases this is owing to the capacity of the venue. Levels of achievement are not consistent – one venue achieved above average sales for one DTP tour but significantly under average for the next.

Figure 21: % ticket sales for the DTP tours compared to the comparator dance and drama events in the same seasons

(Note: the top of each line represents the highest ticket sales across the venues, the bottom of the line represents the lowest and the symbol is the average across the tour)

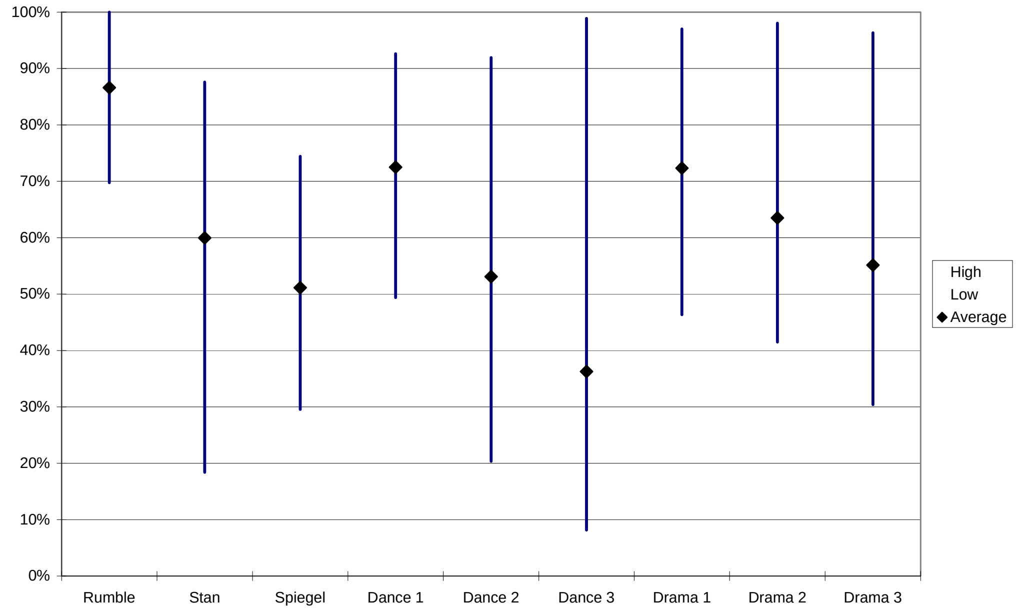


Table 5: Percentage ticket sales for DTP events and comparator dance and drama events by venue

	Rumble	Stan	Spiegel	Dance 1	Dance 2	Dance 3	Drama 1	Drama 2	Drama 3
Gardner Arts Centre	96%	69%	57%	81%	92%	24%	49%	60%	42%
Hall for Cornwall	100%	51%		70%			92%		
Lighthouse, Poole	97%	18%	52%		38%			51%	
Lowry	90%	66%	53%	84%	63%		89%	82%	
Nottingham Playhouse	88%	84%	33%	66%	45%	26%	47%	49%	47%
Oxford Playhouse		68%	74%		60%	8%		98%	60%
Warwick Arts Centre	93%	88%	59%	93%		99%	68%	64%	96%
Wycombe Swan	70%	36%	30%	60%	20%	24%	97%	41%	30%
Average	90%	60%	51%	76%	53%	36%	74%	64%	55%

Highest percentage ticket sales for that DTP tour / comparator artform
Above average ticket sales for that DTP tour / comparator artform

5.2 How effective are our pricing strategies

There is less variation between venues in ticket yields for DTP tours compared to the selected contemporary dance events in the same seasons, with all except Rumble achieving the same degree of relative consistency across the venues as drama.

Figure 22: Comparison of ticket yields for DTP tours and comparator events

(Note: the top of each line represents the highest ticket yield across the venues, the bottom of the line represents the lowest and the symbol is the average across the tour)

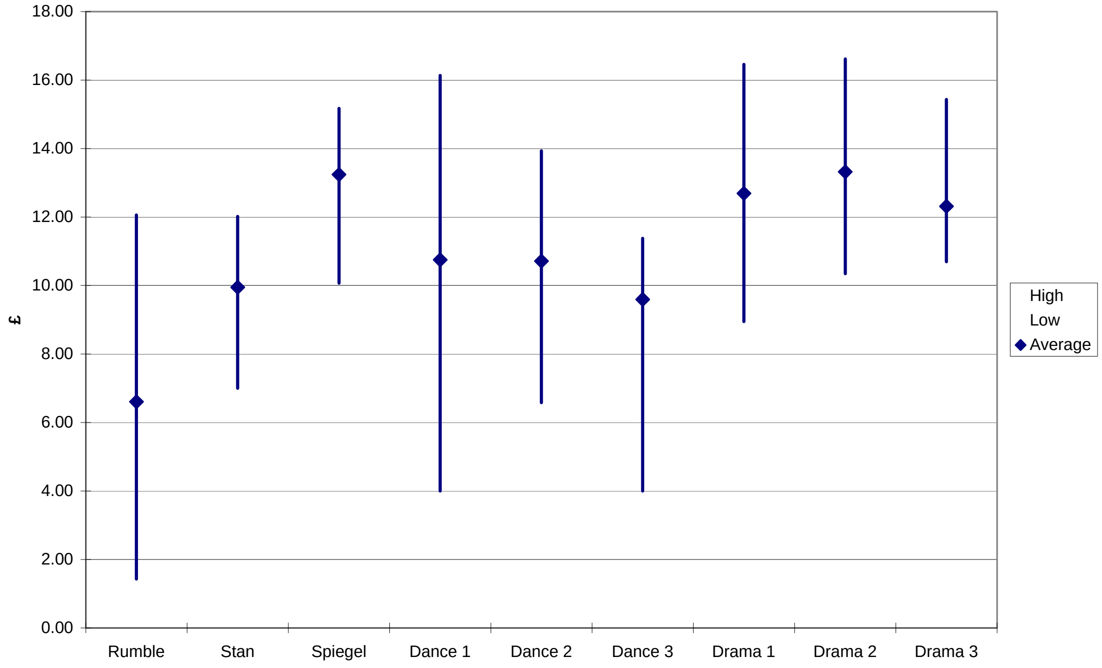
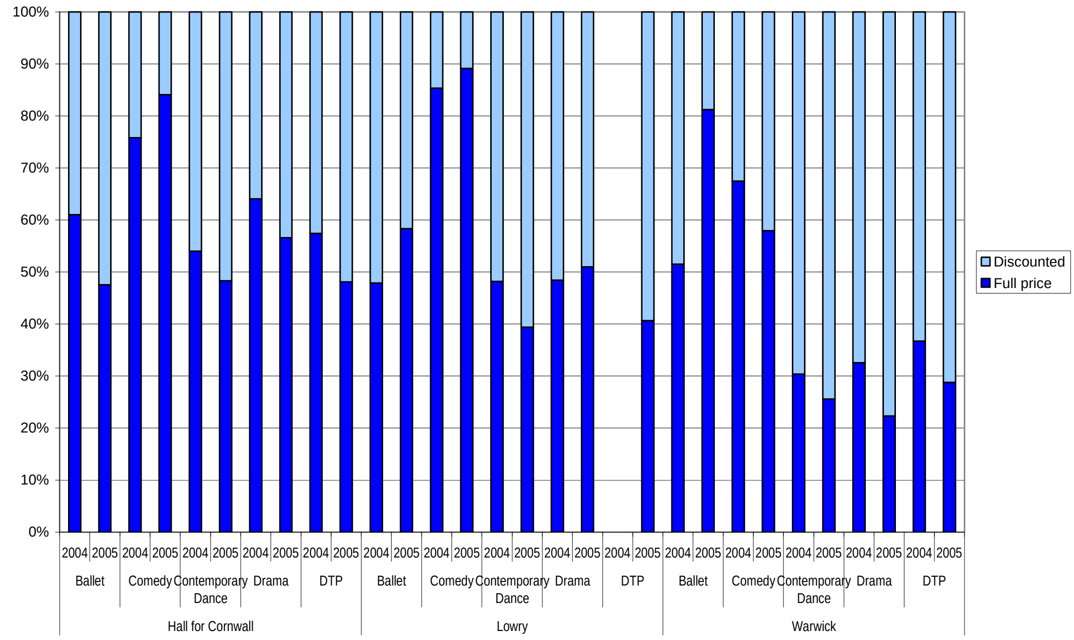


Figure 23: Full price and discounted tickets by artform

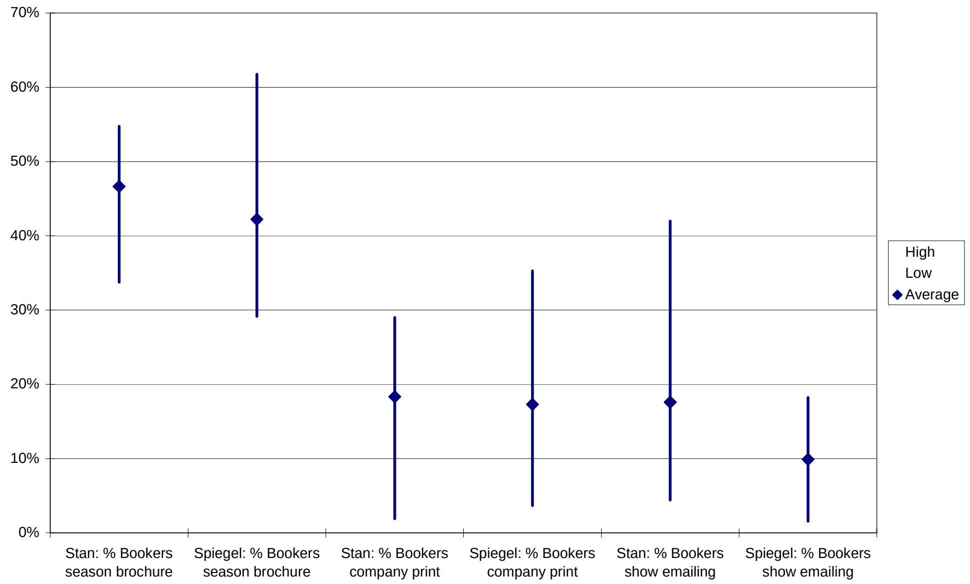


5.3 How are audiences finding out about the events?

The season brochure is the most important method of communication in most venues on the Stan Won't Dance and Ultima Vez tours.

Figure 24: Percentage of ticket buyers responding to different marketing methods

(Note: the top of each line represents the highest proportion of ticket sales for that marketing method across the venues, the bottom of the line represents the lowest and the symbol is the average across the tour)

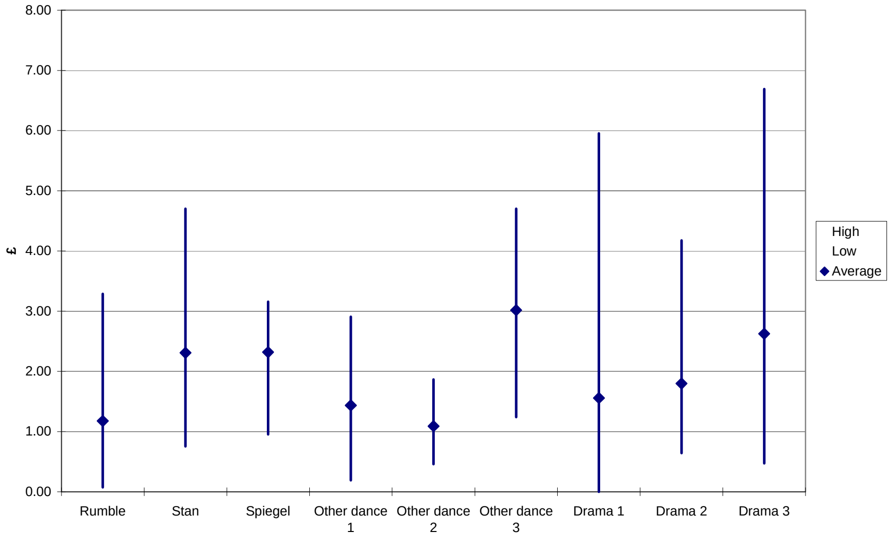


5.4 Return on marketing investment

DTP tours did not require higher marketing investment than the comparator dance and drama events to achieve ticket sales.

Figure 25: Marketing spend per attendance

(Note: the top of each line represents the highest spend per attender across the venues, the bottom of the line represents the lowest and the symbol is the average across the tour)



5.5 How effective are the various marketing tools we use?

There is significant variation in the effectiveness of the same communication channel in different venues. Only two venues, however, were able to assess the effectiveness of their emailings.

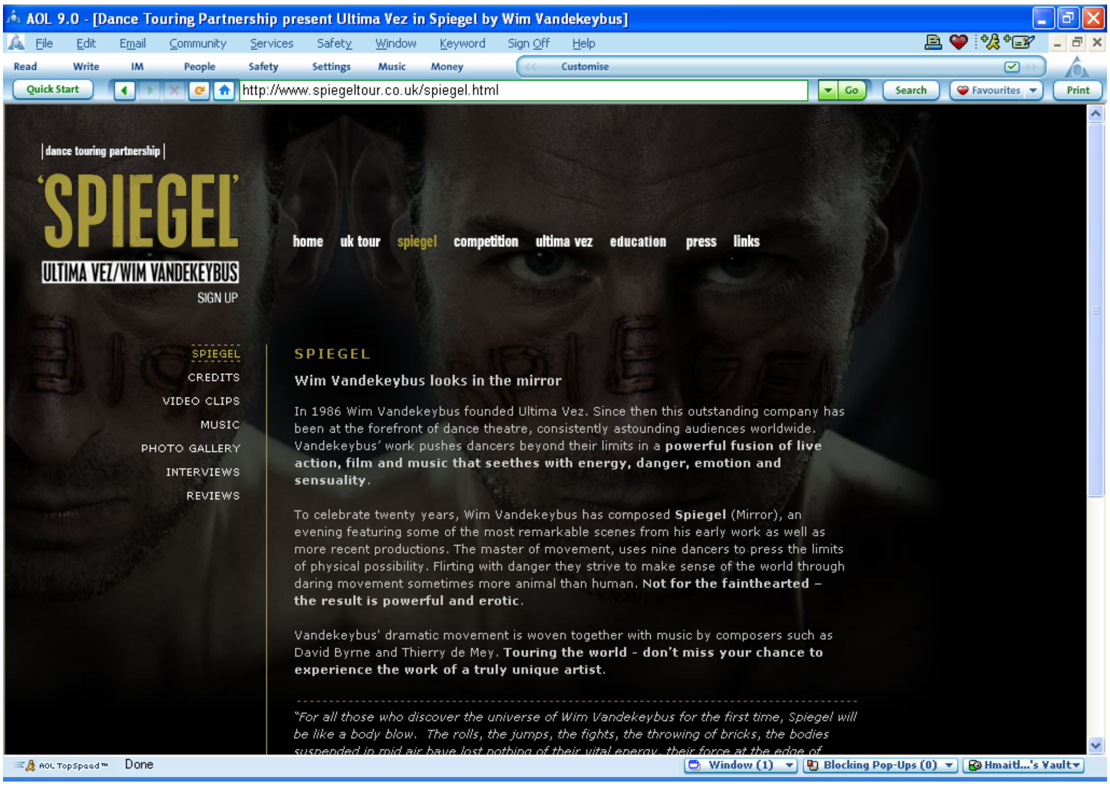
Table 6: Percentage response rates to different marketing methods by venue

	Season brochure response rate		Company mailing response rate		Show emailing response rate	
	Stan	Spiegel	Stan	Spiegel	Stan	Spiegel
Gardner Arts Centre	0.6%	0.8%	6%	9%	5%	7%
Hall for Cornwall	0.1%		2%			
Lighthouse, Poole	0.1%		1%			
Lowry	0.1%		2%	2%	0.2%	
Nottingham Playhouse	0.2%	0.3%	0.2%	2.8%	0.9%	1%
Oxford Playhouse	0.6%	0.2%	3%	1%		
Warwick Arts Centre	0.3%	0.1%	2%	1%		
High	0.6%	0.8%	6%	9%	5%	7%
Low	0.1%	0.1%	0.2%	1%	0.2%	1%
Average	0.3%	0.4%	2%	3%	2%	4%

5.6 How effective is the website?

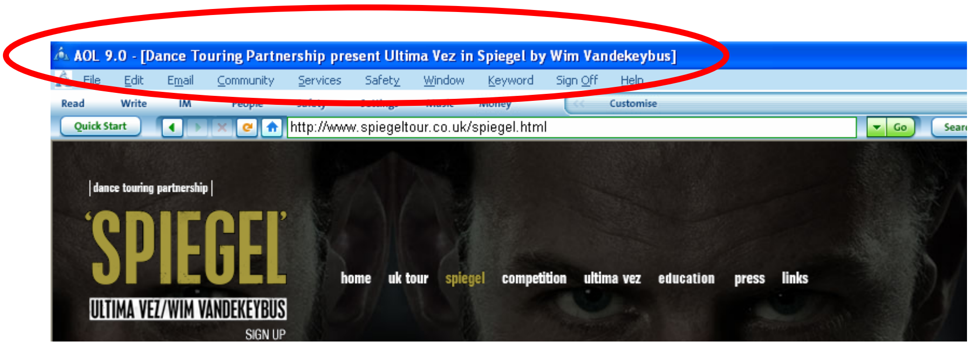
The research element of this project found that the specialist dance audience makes up between 2% and 4% of ticket buyers for dance events and just one in five ticket buyers purchase for more than one dance event per year. The website set up to promote Spiegel was therefore assessed for its effectiveness in attracting non-specialised audiences. The findings were that:

- The website can only be found through the major search engines if the name of the company and the name of the show are entered as search terms
- It cannot be found by someone entering search terms relevant to a general interest in dance in their geographic area eg [dance Salford February]



- This is because the site is not search engine friendly. It can be improved by:
  - using keywords that the audience will use to search (the keywords that meet the threshold were, in order of density, ultima, Spiegel, dance, wim, vez, vandekeybus, touring, present, partnership - all specialist terms that would only be used by people who already know about the event)
  - include text on the home page including a 25 word summary of the benefits of the tour. This should include the most important key phrase for searching in the first and last paragraph of copy
  - include metatags[4] that the visitor would use
  - use a different title tag for each page that describes the content of the page (see below for an example of a title tag).

[4] metatags consist of information in the 'head area' of your web pages that a human visitor can't see but a search engine spider can. You can check what yours are by going to www.ranks.nl and entering your web address.



- To be search engine friendly, a title tag must first describe what the page is about using key words then the organisation
- Only the first 60 characters count so in the title tag above, *Vandekeybus* would not be read by the search engine spider
- The key word density matters (ie the percentage of the total words that consist of key words) so title tags should be short and pithy
- The title tags have too many stop words (ie wasted words) like *present, in, by, and, the* etc
- Avoid using flash on the home page or landing pages from other sites as search engine spiders (and users with low modem speeds) dislike it
- Increase the number of inbound links to improve page ranking (the Spiegel website had 34 inbound links – most arts sites have in excess of 100 and the lovebytes festival has 1,340)[5]

• Participating venues can use their own websites more effectively by ensuring that links, promotions and other benefits appear 'above the fold' (ie in the top section of the page that the visitor can see without scrolling).

5.7 How effective are our emarketing campaigns

Thirteen out of the 14 venues participating in the tour of Ultima Vez had emailing lists. A mystery shopper was given the task of joining each venues' lists to get information about dance events.

Research into the effectiveness of email marketing shows that it needs to be 'anticipated, personal and relevant'.[6] The customer's interest in getting emails from a particular source stems from:

- message relevance
- monetary benefit
- privacy costs (how much information they have to supply in order to join the list)

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[5] Check the number of inbound links for your site by going to www.altavista.com and typing link:[name of your site] in the search box

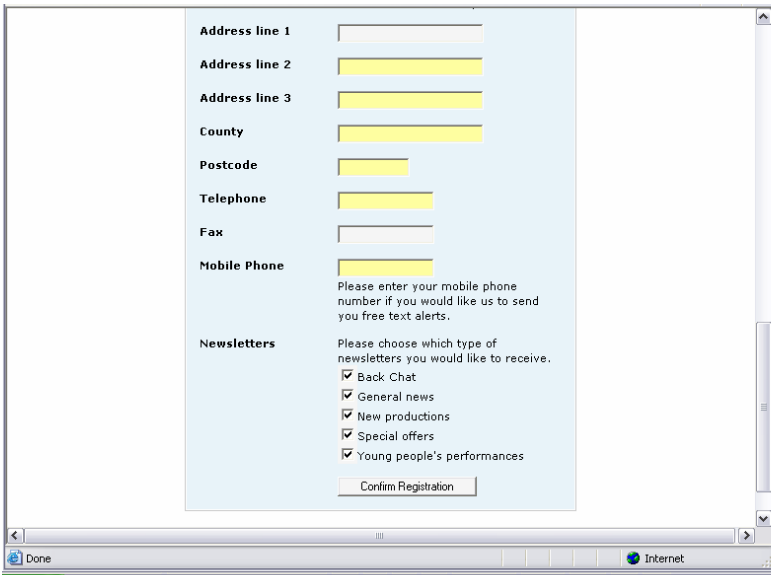
[6] Ruth Rettie, Ursula Grandcolas and Verity Payne, *Email Marketing: Permission to Pester*, consulted at http://www.kingston.ac.uk/~ku03468/docs/permission.pdf on 21/1/08

- message processing costs (how much time and effort it takes to open and read the email)
- personal information entry costs (how much time and effort it takes to enter the personal information required to join the emailing list)

This was therefore the criteria used to assess what happened next.

It was easy to find where to sign up on nine of the websites. On four sites it was difficult to work out the navigation heading under which the sign up page could be found and on one website, the researcher had to ring the venue to find out where it was.

Five venues had a single, unsegmented email list which did not ask the customer what information they wanted. Seven venues had lists segmented by artform. One asked for age group only and one asked the customer to opt into different types of enewsletter:



All asked for reasonable amounts of information only.

Four venues then sent emails asking the customer to confirm their registration. Two of these were relatively simple to respond to, just asking the customer to click on a link. Two were complicated as they asked the customer to enter an automatically created confirmation code or password sent in a separate email and then set up a user name and their preferred password. This is an unnecessary barrier to the simple receipt of information and customers should not be asked to do this until they want to enter into a more complex dialogue with the venue or to book online.

Eight venues sent a straightforward email welcoming the customer to the email list and offering an unsubscribe option. Three venues did not respond to the sign up process.

Over the following eight weeks:

- five venues sent no information at all
- six venues sent between one and five emails – most included relevant information about dance but the venues with unsegmented lists sent this as part of a general email about the season so the customer had to search for the information about dance

- one venue with an unsegmented list bombarded the customer with a total of 18 emails – more than two per week. This included one email about the DTP tour, one email about the dance in the season, one general email launching the season and fifteen irrelevant emails.

The recommendations to the participating venues were:

- It should not take too long to register
- Emails needed to offer useful content
- Messages must be relevant
- Customers should be monitored to see if they are simply deleting the messages and perhaps asked to fine tune their choices Indiscriminate emails (i.e. not perceived as relevant and too often) reduce overall effectiveness
- Emails must be immediately attractive
- Requires a disciplined approach from marketers to send only highly relevant messages
- Requires a segmentable list