



East Midlands Audiences for Dance  
Research and Action Plan  
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Volume One  
Background, Research Summary and Action Plan

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## 1. Background – Why create an audience development action plan for dance?

In October 2007 Derby Dance was commissioned by Arts Council East Midlands to lead on the creation of a snapshot of dance audiences in the East Midlands and out of this to create an Audience Development Action Plan for Dance in the region. There is a great deal of dance related activity already taking place in the East Midlands and there is an ambition to build a strong foundation on which the regional dance ecology can flourish in the future.

The aims of the project are:

- Through data analysis, to identify the key characteristics and behaviours of existing dance audiences in the region
- Through targeted research approaches, identify any barriers to dance performance attendance
- Through dialogue with venues and data analysis, to identify marketing initiatives that have proved successful in attracting new and/or retaining existing audiences
- To create a snapshot of the dance performance infrastructure across the region, mapping both those venues which currently promote dance regularly as well as those that do not but have the technical facilities to do so
- To collate all findings and use these to inform the creation of an action plan to develop both dance audiences and the dance infrastructure of the region
- To enable further development and promotion of the East Midlands as a national focus for dance.

## 2. Methodology

Heather Maitland (arts marketing specialist) and Rachel Gibson (dance consultant) were engaged to carry out the research and produce the Audience Development Strategy.

From the outset it was agreed that the research process should be a collaborative one, in which regional promoters and venues actively participated.

Box office and programme data was gathered from a group of regional venues all of whom regularly programme dance and who collectively represented:

- Geographical spread across the whole East Midlands region
- Contrasting geographic and demographic contexts
- A range of scales from large to small
- Range and variety across their dance programmes

A list of these venues is attached at Appendix 1

On 5 February 2008 a meeting of these venues was held in Leicester to introduce the audience research project and provide an opportunity for the venues to identify specific research questions, in order to ensure that the research was relevant to venues' needs and concerns. A list of research questions identified at the meeting is attached at Appendix 2.

From the long-list of questions and issues, the consultancy team distilled a list of core research questions which:

- Were complimentary to the broad research areas identified in the project's overarching aims
- Were relevant to a significant proportion of the venue group
- Had the potential to achieve tangible results out of the data analysis process
- Had the potential to feed into an audience development plan by offering clearly identifiable practical actions.

In summary the research questions are:

- What is the crossover between different styles of dance?
- What is the crossover between different styles of dance and other artforms?
- How do audiences crossover between contemporary dance and other contemporary artforms?

- Do ticket buyers for “risky” work attend the venue more frequently than those who don’t?
- Do more ticket buyers for familiar dance brands come from outside a 30 minute drivetime in comparison with audiences for unfamiliar dance?
- What proportion of the total ticket buyers at each venue has seen events at each of the other participating venues?
- What is the relationship between catchment and distance or drivetime at each venue?

Concurrent with the data analysis exercise, a survey of venues’ technical facilities and dance programming history was carried out in order to gain a better understanding of the potential building-based infrastructure for dance promotion across the region. A mapping exercise emanating from this survey is attached at Appendix 3.

A further meeting was held at Derby Dance on 10<sup>th</sup> July 2008 at which Heather Maitland presented the research findings and there was discussion of these and their implications for action to develop audiences for dance in the region.

### 3. Summary of research findings

Full data analysis results are contained in Volume 2 of this report. In summary the analysis tailored to address the research questions gave the following results:

What is the crossover between different styles of dance?

- Crossover between dance events is relatively low (maximum of 29%) because most ticket buyers only came once in 2007.
- There is very little crossover between different styles of smaller scale contemporary dance unless the audience was very small and restricted to dance enthusiasts.
- One in five contemporary dance ticket buyers also bought for ballet but this is more likely to be for Northern Ballet Theatre productions than for the St Petersburg Ballet.
- One in five contemporary dance ticket buyers also bought for vintage musicals.
- Ticket buyers for popular dance forms are significantly more likely to cross over with musicals than with dance events.
- Ticket buyers seem to be making their decision to attend based on the kinds of experience offered by each event rather than on the artform of dance

What is the crossover between different styles of dance and other artforms

- Relatively few ticket buyers who are only interested in dance – at Lakeside and at Nottingham Playhouse, 10% of all ticket buyers for dance since the box office computer system was installed have bought tickets more than once and only bought for dance.
- There appear to be large numbers of lapsed attenders – at Lakeside, 36% only attended the venue once since the box office computer system was installed. At Nottingham Playhouse, the figure for one time only ticket buyers was 32%.
- At Lakeside, 54% of all ticket buyers for dance since the box office system was installed have bought for other types of event.
- Of all the tickets bought by ticket buyers for dance in the past five years at Lakeside and Lincoln Drill Hall, only 15% are for dance events.

How do audiences crossover between contemporary dance and other contemporary artforms?

- People who buy tickets for high risk dance events also see mainstream and mass appeal events.
- In two of the three venues analysed, those buying tickets for high risk dance events attend more high risk events overall, but this is not the case in the third venue.
- As with crossover between artforms, ticket buyers' purchases reflect the nature of the overall programme.

- Ticket buyers for contemporary dance do not appear to be making decisions based on perceived risk.

Do ticket buyers for 'risky' work attend the venue more frequently than those who don't?

- Ticket buyers for "risky" dance are more likely to be frequent attenders of the venue.

Do more ticket buyers for familiar dance brands come from outside a 30 minute drivetime in comparison with audiences for unfamiliar dance?

- At least two thirds of ticket buyers come from within a 30 minute drivetime, so audiences for dance are predominantly local.
- There is no link between the familiarity of the brand and the proportion of ticket buyers travelling for more than 30 minutes.
- At two of the venues providing data for this element of the research, the events with the smallest proportion of people coming from outside a 30 minute drivetime were those with the smallest audiences. The distance people are willing to travel is therefore more likely to be linked to the inherent overall appeal of the event rather than familiarity.

What proportion of the total ticket buyers at each venue has seen events at each of the other participating venues?

- Not only are the venues promoting dance in the East Midlands not competing, they are not fulfilling their potential in their immediate local area.
- Although there is significant overlap between the 30 minute drivetimes of venues, there is a remarkably low number of ticket buyers attending dance at more than one venue at 1.1% of ticket buyers, just 153 people out of 14,531.
- On average, 4.9% of the potential audience for contemporary dance within a 15 minute drivetime of each venue and 3.9% of the potential audience for ballet are actually buying tickets at the venue.

What is the relationship between catchment and distance or drivetime at each venue?

- Although the participating organisations' catchments range between a 15 minute and a 30 minute drivetime from the venue, there appears to be little other relationship between catchment and distance or drivetime at each venue.
- It is possible that venues have 'psychological' catchments with people tending to prefer going to one particular town or city rather than another that may be a similar distance away.
- The results could be influenced by the marketing effort that organisations focus on different areas of their catchment. Even so, it is likely that the catchments are heavily

influenced by competition from other towns and cities. This is not competition from other venues programming dance because of the remarkably low levels of crossover. It could, however, reflect the pull of those towns and cities for such activities as workplace, shopping and leisure.

A venue's catchment for dance was defined as any postal sector that contains at least 1% of ticket buyers at each organisation for the selected dance events. This catchment could be regarded as the area that would give the best return on any investment of marketing time or money for dance events.

#### 4. East Midlands Audiences for Dance Action Plan

The audience development research highlighted a number of significant features of the East Midlands' infrastructure and audience for dance. These include:

- The region has a relatively large number of venues with the technical capacity to present dance, particularly at the small scale
- There is a high degree of venue loyalty, with very little audience cross-over between venues (only 1.1% of ticket buyers attended dance at more than one venue)
- The audience is influenced more by the perceived appeal of a show than its artform
- The dance-specialist audience is small. There are very few ticket-buyers who are only interested in dance
- The current average capacities for dance are low (but varied). There is significant unused capacity across all scales
- There is cross-over between audiences for dance and other kinds of event – e.g. popular dance forms and vintage musicals
- Ticket buyers for “risky dance” tend to buy tickets for other “risky” events and attend a venue more frequently than those who come for less “risky” work
- The distance people are prepared to travel is more likely to be linked to overall appeal of an event than to its familiarity. It could also be influenced by a “psychological” catchment determined by people’s loyalty to a particular city or town because of their work or shopping and leisure preferences.

This picture points strongly towards action in some key areas. Foremost among these are:

- The specialist dance audience in the region is tiny. The majority of attenders are venue loyal, interested in a range of work and tend to make choices based on what they are familiar with and what they perceive to be the appeal of a show rather than its artform. This suggests that the way to build a dance audience is through targeted selling of varied programmes which include dance rather than on an artform basis
- There is very little competition between venues for dance audiences. This suggests that an action plan for the region can be founded on collaborative venue effort as well as individual targeting of local audiences.

This action plan is founded on the information gained through research and data analysis, with reference to other relevant research as appropriate and is informed by the discussion with regional venues at the meeting held at Derby Dance on Thursday 10<sup>th</sup> July 2008.

## East Midlands Dance Audience Research and Action Plan

Although the use of ICT-based marketing techniques did not form a specific part of the research for this project, research into digital capacity in dance carried out by Rachel Gibson for ACE national office between May and July 08 has given rise to indicators that could usefully be explored by EM venues as part of the action plan.

The research and action plan conclude the consultancy, but mark the beginning of an action phase, the results of which should be tracked and evaluated. The actions proposed below are those that can be realistically initiated and implemented within a two-year timeframe. Over this period venues should work together and with Cultivate and the Arts Council to capture data and, using the consultancy as a baseline, assess the impact of the proposed approaches on attendance at dance events across the region.

### Actions

#### 1. Actions for the venues

##### Working together

The lack of competition between venues for audiences means that closer working between venues is likely to be beneficial rather than detrimental:

- Use the recently established Touring Network Consortium as a forum for continuing dialogue between venues
- Take into account Cultivate's research into National and International Touring in the East Midlands (due for completion in September 2008) and look at ways in which the information and actions flagged in the Derby Dance and the Cultivate work can be used together to develop approaches to audience development across the region
- Share data and intelligence on audiences to build on and enrich the picture created through the audience research
- Utilise the specialist dance expertise that exists at Derby Dance/Déda and Dance4 to develop regional knowledge and debate around dance programming issues.

##### Catchment and attendance patterns

The audience for dance is venue-loyal with an interest in a wide range of arts activity. Dance events successfully attract first-time attenders who often go on to attend a range of other events:

- Use the catchment mapping and post code analysis information generated by the research to target audiences within a thirty minute drive time of each venue
- Identify lapsed attenders and encourage re-engagement
- Recognise that audiences are looking for a good night out and that this is determined not only by what they see on stage, but the whole experience of being at the venue. Attention to customer care is as important as programming choices in terms of attracting and retaining audiences.

## East Midlands Dance Audience Research and Action Plan

### Communicating familiarity and appeal

Audiences are attracted by events with which they perceive to be appealing and/or familiar, regardless of artform:

- Present a varied overall programme which includes a regular and evenly spread dance element
- Pilot new approaches to copywriting for dance events. Work with companies to adapt copy in light of venues' knowledge of their audiences
- Explore the possibility of encouraging companies to make video material available and use this on venues' websites to help audiences gain a better sense of performances on offer
- Test the impact of strategically planned return visits by dance companies. This should include both return visits to an individual venue over time and venues presenting the same company within a touring period. In the case of the second approach the potential to attract regional media coverage on the back of an extended presence in the region by a particular company should be explored.

## 2. Actions for Arts Council East Midlands

The audience development research would not have been possible without Arts Council support. As well as identifying actions for the venues themselves the project has given rise to actions

- Offer high quality training in marketing techniques to companies and the marketing agencies with which they work; hand-in-hand with this use the evidence provided by the audience development research to highlight to companies the kinds of marketing resources that venues need from them
- Support data gathering and analysis over the two years of the action plan so that its impact on audience habits in the region can be assessed.
- Encourage venues identified in the venue mapping exercise as having the technical capacity to present dance but which are not currently doing so to begin to programme dance in order to achieve wider geographical spread of dance programming. This is in response to the research findings on drive-time and catchment and will help to increase the critical mass of dance-aware programmers in the region

## Appendices

### Appendix 1

List of venues participating in data gathering and analysis

Stamford Arts Centre	Small
Déda (Derby Dance)	Small
Curve (Leicester Performing Arts Centre)	Mid
Phoenix	Small
Nottingham Playhouse	Mid
Lakeside	Mid
Dance4	n/a
Trinity, Gainsborough	Small
South Holland Centre	Mid
Royal and Derngate, Northampton	Large
Blackfriars, Boston	Small
Guildhall Arts Centre, Grantham	Small
Lincoln Drill Hall	Small
Buxton Opera House	Mid
Royal Centre, Nottingham	Large
Peepul Centre, Leicester	Mid
Lincolnshire Dance	n/a

## Appendix 2

### Detailed research questions

#### 1. Data analysis and identification of audience trends

##### A. Tracking audiences' booking history

Venues involved: Nottingham Playhouse, Lakeside, Lincoln Drill Hall and Derby Dance

Information need	Research question	Method
1. How do we persuade an audience to come on a journey with us towards risky work? (origin: from mtg feedback)	What are the steps on the journey that people take to risky work?	Box office data analysis – past booking history of ticket buyers for 'risky' contemporary dance.
2. Can we look at contemporary dance in the context of other contemporary artforms? (origin: from mtg feedback)	How do audiences crossover between contemporary dance and other contemporary artforms?	
3. How do you get people to crossover between artforms? (origin: from mtg feedback)	How do people crossover between artforms?	Box office data analysis – past booking history of ticket buyers for dance.
4. When we communicate with audiences, should we divide up dance into different categories than we do at the moment?	What is the crossover between different styles of dance and other types of arts event?	
5. Typologies		

East Midlands Dance Audience Research and Action Plan

B. Crossover between different styles of dance

Venues involved: Royal Concert Hall/Theatre Royal, Nottingham and Peepul Centre, Leicester

6. Is it generally true that there are audiences for different types of dance that don't crossover? (origin: Dance4 mtg)	What is the crossover between different styles of dance?	Box office data analysis – ticket buyers who have purchased for more than one (or more?) dance event over a period of time.
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C. Frequency and risk

Venues involved: all venues able to analyse frequency

7. Do regular bookers at a venue take more risks with their choice of events (origin: Dance4 mtg)	Do ticket buyers for 'risky' work attend the venue more frequently than those who don't?	Box office data analysis – frequency of attendance of ticket buyers for 'risky' work compared to average frequency of attendance of the rest of ticket buyers
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East Midlands Dance Audience Research and Action Plan

D. Travel and risk

Venues involved: Buxton Opera House (familiar and unfamiliar ballet brands)

8. Is it true that significantly more people will travel over 30 minutes to see a familiar brand than an unknown quantity? (origin: Dance4 mtg)	Do more ticket buyers for familiar dance brands come from outside a 30 minute drivetime in comparison with audiences for unfamiliar dance?	Box office data analysis – extraction of postcodes for ticket buyers of different categories of dance.
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E. Outreach and attendance

Venues involved: one Lincolnshire Dance project

9. Do accidental encounters with dance create audiences? (origin: from mtg feedback)	Do people who incidentally encounter dance go on to attend performances?	Postal survey to people who have accidentally encountered dance as part of a project asking about their attendance before and after.
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F. Geography and travel

Venues involved: all venues plus Dance4 mailing list

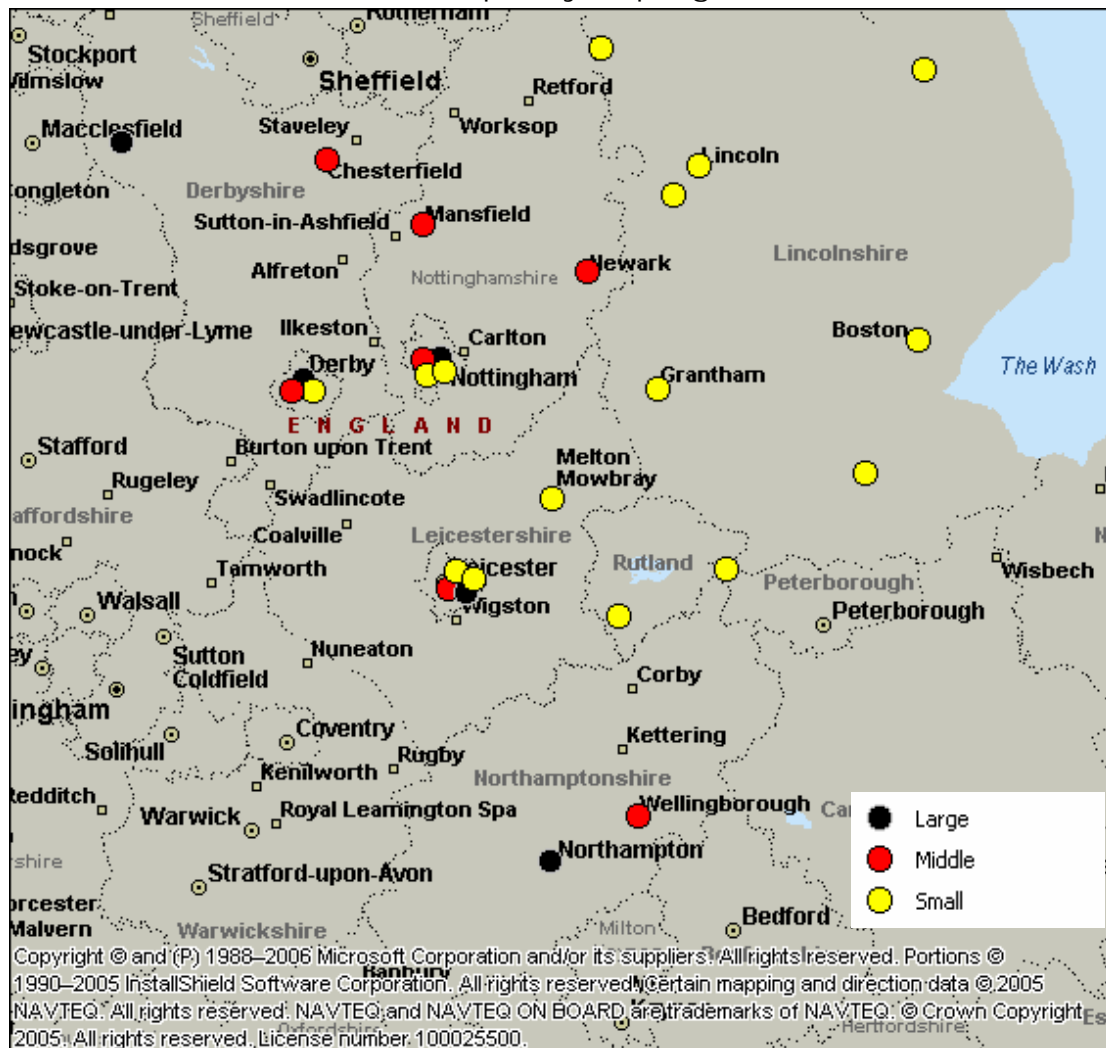
<p>10. What is the crossover between different venues (origin: original brief)</p>	<p>What proportion of the total ticket buyers at each venue has seen events at each of the other participating venues?</p>	<p>Box office data analysis – extraction of names, addresses and postcodes for ticket buyers for dance</p>
<p>11. Do venues have 'psychological' catchment areas that have little to do with travel time or distance? (origin: Dance4 mtg)</p>	<p>What is the relationship between catchment and distance or drivetime at each venue?</p>	<p>Box office data analysis – extraction of names, addresses and postcodes for ticket buyers for dance</p>

## Appendix 3

### Venue Mapping Exercise

One of the strengths of the East Midlands region is its large number and wide distribution of venues. The audience development research included a mapping exercise to identify regional venues that have suitable technical facilities for dance, both those that are currently programming dance and those that are not. The first of the maps plots the locations of these venues across the region, the following map superimposes 15 minute drive-times for each of the venues.

Venues with the technical capacity to programme dance



Venues with technical capacity to programme dance with 15 minute drive-times

