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East Midlands Dance Audience Development Action Plan
Volume Three: Research Overview
What do we know about audiences for dance?

July 2008

Acknowledgement: This report updates and develops the literature review commissioned by Dance Touring Partnership in 2005

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Executive Summary

The Dance Snapshot research project had the stated aim of producing "a piece of audience development research for dance which will further develop the dance ecology within the three cities of Derby, Leicester and Nottingham and the wider East Midlands". The key outcome was to gain an overview of the current audience for dance in the East Midlands.

This, Volume 3 of the overall project report, is the result of Phase I. It is a summary of 31 reports of research into audiences for dance since 1995.

Most of the audience research summarised has not been published so many thanks to the organisations that provided it, particularly those that made available documents only intended for internal use.

Phase II of the Dance Snapshot project analysed 14,445 ticket buyers for 76 dance events in 2007 at 13 venues while Phase III analysed in detail the purchasing patterns of ticket buyers for dance at a sample of venues. The results can be found in Volume 2 of the overall project report.

What are they like?

- The potential audience for a contemporary dance event is around 6% of the adult population within a 30 minute drivetime, 8% for ballet.
- The catchment for contemporary dance is broadly the same as the particular venue's overall catchment, with a small number of enthusiasts willing to travel long distances. Between half and two thirds come from within a 30 minute drivetime.
- Dance attenders don't move around lots of different venues.
- Dance audiences are similar to audiences for other artforms at the venue.
- Around two in three dance attenders are women (but bear in mind that still means that one in three are men)
- Contemporary dance attenders are twice as likely to be from professional and managerial social grades, in particular workers in education and in public services. Audiences London found that a third of ticket buyers were from the Mosaic category Symbols of Success and another third from the Urban Intelligence category. The Symbols of Success category tend to be middle aged, successful with professional careers and high incomes, choicest housing and expensive cars. The Urban Intelligence Category tend to be young singles, few children, well educated, full time students or professionals, open-minded with cosmopolitan tastes.
- There is a strong link between attendance at contemporary dance and educational attainment. Audiences are twice as likely to be still studying or to have stayed in education until they were at least 19 years old.

- The age profile of audiences is similar to the age profile of the general audience at the venue and varies widely depending on the particular dance event. The proportion of child, school, student and young people's tickets for the same touring production ranged between 2% and 66%. In some venues contemporary dance seems to attract more under 16s than other artforms but this depends on what is programmed – some drama events attract large numbers of young people and some contemporary dance events attract a much older audience.
- The proportion of students and school children for a particular event depends on the nature of the work, whether it is programmed at weekends or during school holidays, the relationship the venue has with schools in its area and on whether it was marketed to schools and colleges.

What do they attend?

- Audiences are made up of a small number of dance enthusiasts and a large number of general arts attenders who attend dance alongside a wide range of other artforms.
- The proportion of first time ticket buyers for dance and first time ticket buyers at the venue varies considerably depending on the company, the venue, 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.
- Box office data fairly consistently shows that one in five ticket buyers purchase for dance events more often than once a year. Questionnaire research with relatively low response rates tends to show a higher proportion of frequent attenders but this is likely to be because only people who feel committed to the venue or the artform fill in questionnaires.
- 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. Programming more dance does not increase frequency but does lead to an increase in the overall number of people attending dance.
- 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. Over a longer period of time, far more people come back to see particular companies but the vast majority do not see them every year.
- We can define between 2% and 4% of ticket buyers 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 as between a third and a half of ticket buyers only attend the venue once.

- The majority of dance attenders base their purchasing decisions on the available information about a particular event rather than making links between dance styles. There is little crossover between very different styles of contemporary dance.
- Between a half and three quarters of ticket buyers for dance have also bought for non-dance events at the venue.
- The decision to attend a particular dance event is based on the pre-conceptions triggered by the available images and information. In effect, each dance event is competing against every other event on offer, whatever the artform.
- They tend to book slightly later than audiences for other artforms.

How can we build audiences?

- On the whole, potential dance attenders are like dance attenders who haven't attended dance yet.
- Barriers to attendance are: feelings of intimidation, aversion to risk, negative pre-conceptions about contemporary dance, fear that the performances won't live up to expectations of perfection, other time commitments.
- Ticket buyers for dance tend to think about relative value for money not price. If they believe there is no guarantee of quality then even a very low price is too much to pay. A low price means poor quality to many existing attenders.
- Conversely, first time attenders of dance are willing to take risks but only if the price was low enough.
- Only ballet attenders said that they would 'attend dance performances more often if the price of tickets was lower'. Other research identifies price as possibly deterring relatively frequent attenders from attending even more often.

Introduction

This research project had the stated aim of producing "a piece of audience development research for dance which will further develop the dance ecology within the three cities of Derby, Leicester and Nottingham and the wider East Midlands". The key outcome was to gain an overview of the current audience for dance in the East Midlands.

This, Volume 3 of the full project report, is a research overview undertaken to ensure that the primary research phase of the project covered new ground rather than reinventing the wheel.

It focuses primarily on research reports written between1995 and 2007 into the behaviour and attitudes of attenders of dance styles that the researchers have categorised as 'contemporary'. It covers research into other styles and into participation where this offers important insights into audiences not covered by research specifically into audiences for 'contemporary dance'. Research involving self-completion questionnaires that achieved response rates of less than 40% has generally been excluded unless the topics covered cannot be sources elsewhere. A list of the research reports included in the overview can be found on page. 34

This overview is not comprehensive because most of the audience research has not been published, having been undertaken with the aim of supporting the companies' and venues' marketing practice. Many thanks must therefore go to the generosity of organisations providing research, particularly those that have made available documents intended for internal use only. In particular, the report draws on work commissioned by Dance Touring Partnership between 2005 and 2007 to answer its partner venues' questions about audiences for dance. It is around these questions that the report is structured.

It is hard to come to definitive conclusions from an overview of existing research because so many of the reports have formulated questions and categorised key information in different ways. The summary at the beginning of each section is therefore the author's own interpretation of the data. The results from individual pieces of research are then set out to enable the reader to draw their own conclusions.

Who attends dance events?

Q: How many dance attenders are out there?

A: The potential audience for a contemporary dance event is around 6% of the adult population within a 30 minute drivetime. The potential audience for ballet is around 8%

6% of participants in the Target Group Index research for 2007 say they attend contemporary dance 'these days'. This compares to 28% who say they attend plays, 7% ballet and 41% any performance in a theatre. The figure for dance is up from 3.4% in 1993/4 (1). In Canada, the figure for all dance is 6.8% (14) and in Finland 6%. (15)

4% of interviewees in Arts Council England's *Taking Part* survey said they had attended ballet in the past 12 months, 2% contemporary dance and 2% other live dance. (30)

7% of respondents in a major piece of research in Scotland in 2001/2[1] said they ever attended contemporary dance these days. In 1998, 10% of respondents said they attended. This is not necessarily professional contemporary dance, however, as 41% of all respondents said that the most recent performance they had seen was by amateur performers. 2% of respondents said that they every participated in contemporary dance nowadays and 5% say they watch it on the TV, DVD or internet (2).

4% of London households bought tickets for dance over a two year period. (28)

Q: What are they like: gender?

A: Around two in three dance attenders are women.

3% of men and 5% of women said they had attended ballet in the past 12 months, while 2% of men and 3% of women had attended contemporary dance. (30). 72% of the participants in the 2005 Rambert Dance Company research were women. (17)

This kind of demographic data must be treated with caution when planning marketing campaigns. For example, although TGI tells us that contemporary dance attenders are more likely to be female than male, more than one in three contemporary dance attenders are men. (1)

Q: What are they like: social grade and occupation?

A: Contemporary dance attenders are twice as likely to be from professional and managerial social grades, in particular workers in education and in public services.

AB adults participating in the TGI research – that is adults from households where the main wage earner is in a professional or managerial occupation - are significantly more likely to say they attend contemporary dance 'these days' (10.2% compared to 5.7% of all adults). However, those who said they attended contemporary dance are no more likely to be from social grades ABC1 than those who said they attended plays. (1)

An analysis of the Premier TGI surveys 1995-1999 carried out by BMRB has identified the following occupations with high levels of attendance at contemporary dance: teachers in Higher Education, other teachers, other types of educational occupation, people working in welfare and social services, authors, writers and journalists, artists and designers, actors and musicians. (3)

[1] Unfortunately, the 2006 Scottish Arts Council research entitled *Taking Part* does not give separate figures for attendance at dance or ballet.

A quarter of interviewees in the 2005 Rambert research were 'teaching and research professionals', 11% were business managers and 11% were business and public service professionals. (17)

Q: What are they like: education achievements?

A: They are twice as likely to be still studying or to have stayed in education until they were at least 19 years old. The proportion of students and school children for a particular event depends on the nature of the work and on whether it was marketed to schools and colleges.

TGI respondents who are still studying are twice as likely to say they attend contemporary dance as respondents as a whole (12% compared to 6%). 11% of those who finished their education at 19 years old or above said they attend. Those who completed their education earlier than this are less likely than respondents as a whole to say they attend. (1)

In Finland, too, those who finished their education at 19+ are almost twice as likely to attend as those who finished earlier (13% of respondents compared to 7%). (15)

Students made up over 20% of the respondents to Motionhouse's questionnaire (16) and 30% of the respondents to the Destination: Dance surveys (20) and 9% of audiences for arc Dance Company at venues that distinguished between different types of concessionary ticket.

Q: What are they like: non-arts consumption?

A: They like going out to wine bars and restaurants, go on short breaks and shop at John Lewis, Waitrose, House of Fraser and Waterstones.

Participants in the TGI research who said they attend contemporary dance 'these days' are at least twice as likely as the general adult population to have the following patterns of consumption:

- hold a First Direct credit or charge card
- hold a John Lewis Partnership store card, (and almost as likely to hold a House of Fraser Card)
- taken a City or Short break or been skiing as their last or last but one holiday
- to visit wine bars both regularly (more than once a week) and occasionally (once a week) with visiting restaurants in the evening more than once a month almost achieving the threshold
- have shopped in the last three months at Waitrose, Tower Records, Waterstones, Habitat (four times more likely than the general adult population), House of Fraser, John Lewis and specialist health food shops (with Budgen almost achieving the threshold)

- made a visit in the last 12 months to a museum, other places of historic interest, an archaeological site, other places of natural interest, a nature reserve and an international handicraft or DIY exhibition
- be a member of English Heritage
- participate in athletics, keep-fit or aerobics, skating, skiing, tennis, yoga, and dancing (where they have to pay to take part), have paid to watch tennis and be a member of a gym. (4)

Q: What are they like: types of dance attender?

A: Several pieces of research distinguish between dance enthusiasts and general arts attenders who attend dance alongside a wide range of other artforms.

These typologies resulted from research at Warwick Arts Centre (7) and were tested and confirmed by focus group research by arc Dance (9) and across Scotland (11). In this last piece of research, participants in the attender groups were roughly equally divided between Enthusiasts and Incidentals, although Incidentals were just as likely to be over 35 as under 35. Participants in the non-attender groups consisted of Hesitants and people who were very similar to the Incidentals but who had not yet been sufficiently motivated to see dance at that particular venue.

The Hesitants

- Attend infrequently
- Consider carefully before they attend
- Have been disappointed in the past and are therefore easily put off
- Only comfortable with the familiar
- Lack confidence that they will understand
- ‘I don’t want to be made to feel stupid’
- Are mainly over 35
- Are not sensitive to price but paying out for the unknown is unattractive.
- ‘I would not risk paying the money to see something on chance’

The Incidentals

- See themselves as general arts attenders
- See a variety of art forms and incidentally choose dance
- Choose any event if it looks particularly interesting
- Tend to be under 35
- If they are disappointed by a performance, they might avoid a company in the future but they are still willing to experiment
- ‘The unknown is very exciting’

The Enthusiasts

- Are frequent attenders at contemporary dance events
- Seek the challenge of the new and unfamiliar
- Feel confident in their background knowledge and are interested enough to seek more
- Quickly put bad experiences with companies they are loyal to behind them
- Span both age ranges but are most often over 35
- Have strong likes and dislikes
- Are adventurous in their choice of programme but seek background information before committing to something new.

The Come What Mays

- Endeavour to see all available dance
- Are strongly and emotionally committed to the art form
- Almost feel a duty to attend and experience guilt if they do not see all the dance they are able to
- Are both under and over 35
- Are the most price conscious because their frequency of attendance means they are spending a higher proportion of their disposable income on dance
- Are loyal to dance not the venue.

Research in Chicago identified four typologies for attenders. Their Dance Fans segment is almost identical to the Enthusiast group above but, because they first of all divided the sample into attenders and non-attenders according to their purchases in the previous 12 months, it is difficult to compare the other groups as many of the so-called non attenders attended dance but at a frequency of less than once a year. (13)

Quantitative and qualitative profiling research in Australia identified that 45% of contemporary dance attenders are ‘experiential’ in attitude: that is they love trying new things, supporting the arts and new groups, they mix with similar people, and they like being stimulated both visually and intellectually. This is very similar to the Incidental segment described above.

Q: How old are they?

A: The audiences for different companies and venues have very different age profiles.

30% of TGI respondents who said they attended contemporary dance 'these days' are aged 15-34, 39% are aged 35-54, and 20% are aged over 55. The research sample does not include under 15s.(1)

In Canada, 8% of 18-24 year olds attend compared to 9% of 45-55 year olds. People over 45 accounted for half of all tickets sold for dance that year. (14)

The Dance Touring Partnership research used discount types 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 which ranged from 2% to 66%. Senior Citizen discounts ranged from 1% to 12%. (29)

	15-34	35-54	55+
TGI (1)	30%	39%	20%
Motionhouse (16)	-	48%	-
Rambert 2005 (17)	17%	39%	44%
Birmingham dance attenders (21)			
Ballet	21%	58%	22%
Contemporary dance	46%	39%	15%
Black dance	50%	39%	11%
Populist dance	41%	48%	12%

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

A: Contemporary dance as a genre does attract a bigger proportion of under 16s than other artforms but this varies widely between companies and venues.

A: TGI tells us that young people make up a bigger proportion of contemporary dance attenders than other art forms: 25% of those who say they attend contemporary dance are aged 15-24, compared to 13% of ballet attenders and 15% of play attenders. Note that they still only represent one in four of the audience. One in five is aged over 55. (1)

Contemporary dance does not consistently attract younger audiences. The age profile of audiences for specific companies can be significantly younger or older than indicated by TGI. TGI only surveys over-15s so, to make a comparison, those under 15 must be excluded .

	Under 16s as a percentage of all research respondents	16-24s as a percentage of over 15s
TGI (1)	-	25%[2]
Motionhouse (16)	15%	35%
Rambert Dance Company 2005 (17)	6%	7%
Destination: Dance (20)	30%	20%
Birmingham dance attenders (21)		
Ballet	5%	5%
Contemporary dance	5%	27%
Black dance	0%	9%
Populist dance	8%	18%

The proportion of 25-34 year olds varies less dramatically. 16% of adults (over 15) participating in TGI who say they attend contemporary dance these days are aged 25-34 (1), compared to 10% of Rambert respondents (17), 19% of Birmingham contemporary dance attenders (21), 17% of Motionhouse respondents (26) and 11% of arc attenders (9).

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 (unless the venue is in a rural area).

An analysis of ticket buyers for Rambert Dance Company at the Theatre Royal Norwich in 2001 showed that just 15% travelled for more than 60 minutes. The majority of ticket buyers were relatively local to Norwich although this might be a result of the poor transport infrastructure in this rural area. 67% of ticket buyers at Sadlers Wells came from London postal districts. (5)

In Scotland, 66% of all bookers for dance came from a 30 minute drivetime of the venue. On average, one in five travelled more than an hour (excluding international bookers) due to the higher drivetimes predominant in the very rural catchments of some venues.

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[2] The figure for TGI is for 15-24 year olds

Some occasional ticket buyers for dance in the East of England were willing to travel to see dance but all respondents said that convenience was a key factor. Under 15% of respondents had seen modern dance at venues other than the five researched. (6)

Research in Birmingham uncovered much higher percentages of respondents willing to travel more than 30 minutes to see dance and high levels of crossover with London venues. The low response rate to this research, however, means that it is likely that only those particularly enthusiastic to dance or loyal to the venue responded so the results may only reflect the views and behaviour of the core dance audience. (21)

One in ten visitors to the Woking Dance Experience day travelled for more than an hour. Three out of four travelled for 30 minutes or less. (22)

Between 52% and 70% of ticket buyers for Dance Touring Partnership events came from within a 30 minute drivetime. Between 8% and 10% of ticket buyers travelled for more than an hour. Ticket buyers were slightly more likely to travel for more than 30 minutes and more than 60 minutes for contemporary dance than for other artforms. (29)

How often do they attend dance?

Q: What proportion of ticket buyers for dance are first time bookers for the artform?

A: This varies considerably depending on the company, the venue, the work and how it was marketed.

Significant proportions of the participants in arc Dance's research had not previously attended contemporary dance at the venue - as much as 92% at one venue and at least 25% even at venues which frequently present dance. (9) On average, 26% of the audiences for Motionhouse's productions of *Fearless and Volatile* were 'completely new to dance'. (16) Far fewer respondents to the *Perfect* research were new to dance (5%). (26)

Between two thirds and three quarters of dance bookers analysed in the research into Scottish audiences had not previously bought tickets for dance at any of the participating venues and can be seen as new attenders at dance. (10)

Around one in five of the visitors to the Woking Dance Festival Dance Experience were experiencing dance for the first time or had only recently become interested in it. Just over half regularly attended dance performances. A similar proportion had some connection to a participant in the day. (22)

The percentage of first time ticket buyers varies between venues and between productions, ranging between 10% and 68%. Dance Touring Partnership offers additional marketing support for each tour to increase audiences, and in particular encourage first time attendance at dance. In several venues the DTP tours attracted more first time attenders than the comparator contemporary dance and drama events. (29)

Q: What proportion of dance audiences are first time attenders at the venue?

A: Again, this depends on the company, the venue, 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.

A: 35% of participants in the Motionhouse research had not been to the venue before. (16)

Respondents to research into arc Dance's audience were almost all repeat attenders to events at that particular venue but significant proportions had not previously attended contemporary dance at the venue - as much as 92% at one venue and at least 25% even at venues which frequently present dance. (9)

Q: What proportion goes 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.

17% of TGI respondents who said they attend contemporary dance say they go more than once a year compared to 40% of play attenders. 57% said they attended less often than once a year. The average frequency of attendance per year at contemporary dance is between 1.2 and 1.6 visits (1).

Research into the attendance and participation patterns of the Scottish population indicates that less than a third of those who ever attend ballet or contemporary dance say they do so more often than once a year. This is lower than for plays for which a half of those who ever attend say they do so more often than once a year (2).

Between 5% and 37% of ticket buyers for dance in Scotland in 2000 attended dance (including ballet) more than once a year, depending on the venue. Around a quarter buy tickets for two or three dance events a year (10)

Half of ticket buyers for ballet at the Mayflower, Southampton go once or twice a year and around 5% go more often than twice a year. (25)

30% of ticket buyers for dance at seven venues in London bought tickets for dance more than once over a two year period. Just over 10% bought tickets for three or more dance performances over a two year period. Some venues (28)

Q: What proportion goes less than once a year

A: The majority of ticket buyers for dance are general arts attenders who go to dance less often than once a year

Between two thirds and three quarters of dance bookers in 2000 in the venues participating in the Scottish research did not buy tickets for dance the following year. (10)

Research into so-called 'lapsed' ticket buyers in the East of England identified that attenders are general arts lovers. Although the venues categorised them as 'lapsed' they did not appear to be consciously rejecting modern dance. They saw dance as part of a broad repertoire of different types of arts event and therefore something to visit once a year or less, although there were high levels of repeat attendance year on year. 79% of these 'lapsed attenders' said they were 'very likely' or 'quite likely' to attend modern dance in the East of England in the future. (6)

44% of ballet attenders at the Mayflower, Southampton attend less often than once a year. (25)

Just over three quarters of ticket buyers for dance in London in 2004 had not bought for dance at one of the seven participating venues the previous year.

Q: How big is the core dance audience?

A: Questionnaire research with relatively low response rates

TGI tells us that 7% of those who said they attended contemporary dance these days claimed to go at least once every three months (four or more times a year). This compares to 17% of play attenders. These frequent attenders account for 44% of all visits made by respondents to contemporary dance and 55% of all visits to plays (1).

In contrast, around half of arc's audience participating in the qualitative research were 'frequent and enthusiastic' attenders of dance, while the rest were sporadic, infrequent or first time attenders of dance (although the research report does not define how frequently they attend). The researchers made a strong link between the frequent programming of dance and success in growing a large core dance audience. Unfortunately, the quantitative element of this research does not provide evidence to support this as it asked only whether respondents had previously attended contemporary dance or ballet at the same venue, not their frequency of attendance. (9)

In the DTP research, 2% – 4% of ticket buyers were classified as dance enthusiasts as they had bought tickets at the venue more than once and only bought for dance. The research concluded that the strategy offering the greatest potential return on investment to the participating venues was to get first time ticket buyers to return rather than increase the core audience. (29)

39% of Motionhouse's audience for *Perfect* said they attended dance three or four times a year. Respondents attending at this frequency were highly likely to have attended at a venue with a regular dance programme and to be involved in dance through their work or studies. (26)

One in four ticket buyers for dance in Scotland bought for two or more performances in a 12 month period. (10) In Finland, just one in ten attenders are 'heavy users' of the artform, although the report does not define what 'heavy use' entails. (15)

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 and it concludes that increasing the number of dance events does not increase frequency but does result in more ticket buyers overall.

A: An analysis of box office data about 43,848 ticket buyers for dance in eight venues revealed that average frequency of purchase does not increase if more dance performances are presented. More dance events meant more ticket buyers, however, because there are more opportunities to attend for the large pool of general arts attenders who occasionally want to 'see something different'. (10) The researchers who carried out arc Dance Company's research, however, suggested that the venues that programmed dance more frequently were able to develop a larger core dance audience. (9) Motionhouse also draws this conclusion from the results of their quantitative research because frequent attenders were most likely to be from venues that regularly programmed dance (see page 8). (26)

The DTP research found that at the most, one in five ticket buyers buy tickets for more than one dance event a year. There was 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 was not affected by increases or decreases in the number of dance productions programmed. If fact, increases were associated with a decrease in ticket buyers attending more than once, and decreases with an increase in frequency of attendance. This was 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. (29)

Q: Do they come back to see the same company?

A: On the whole audiences do come back to see particular companies but the vast majority do not see them every year.

Three quarters of all ticket buyers for Rambert Dance Company at the Theatre Royal Norwich (TRN) had bought for just one of the total of eight productions on offer during the four visits from 1997 to 2000. 9% had attended three or more of the eight productions. At Sadlers Wells, 88% of ticket buyers attended only one visit by Rambert out of the four. Less than 3% of bookers attended more than two of the four visits.

59% of bookers at for the most recent Rambert production at TRN and 26% at Sadlers Wells had bought tickets for at least one of the preceding seven. The authors of the report conclude that Rambert is effective in retaining customers although the vast majority do not attend each time the company visits. (5)

The DTP detailed analysis of ticket buyers at three venues found that no more than one in five ticket buyers came back to see a company on the subsequent visit, 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. (29)

Focus groups with attenders of arc Dance company found that many 'incidentals' and 'hesitants' have a tick list of events they want to experience and having seen a dance company's work once, they may decide not to attend again because they have 'done' it. The quantitative research revealed that in London, where the company had performed regularly, 35% of respondents had seen the company before compared to 20% elsewhere. (9) The Scottish qualitative research also identified this as an issue, even among frequent dance attenders who say they become bored with the particular dance style of a company or choreographer. (11)

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

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

Research into 43,848 ticket buyers for dance in Scotland identified that over the three years covered by the research, only 10% of bookers attended the particular venue more than once and only bought for dance. However, 17% of bookers in Edinburgh attended dance at more than one venue. (10)

Qualitative research into dance attenders at Warwick Arts Centre identified 'a small proportion' who were loyal to dance and not to the venue. (7)

Just 15% of ticket buyers for dance in London had attended dance at more than one venue in a two year period. 33% had only bought for dance at a particular venue but this includes people who had only bought for one event in total during that time. (28%)

Q: Do they book for particular types of dance?

A: The majority of dance attenders know less about different dance styles than we think and so base their purchasing decisions on the available information about a particular event rather than making links between dance styles. They don't tend to crossover between very different styles of contemporary dance either.

Research into dance attenders at Warwick Arts Centre identified that a very small proportion of attenders try and see all available dance and travel further to do so. A larger proportion, The Enthusiasts, are adventurous in their choice of programme within their strong likes and dislikes but seek background information before committing to something new. (7)

The majority of participants in the arc Dance focus groups had an understanding of other ballet and dance companies but this was often ill-informed and more often than not out of date. (9) The authors of the Scottish qualitative research report found that very few participants could spontaneously recall any names of companies or choreographers. They speculate that attenders at some venues 'do not have access to a sufficiently wide range of dance events to make informed choices between dance styles and between individual choreographers and companies'. (11) Certainly, only 12% of interviewees in the 2005 Rambert research referred to the company correctly as Rambert Dance Company. 53% called it Ballet Rambert, including 40% of first time attenders, even though it changed its name in 1987, eighteen years ago.

The Scottish research concluded that audiences do not associate dance companies with any particular brand values. (11) Research into ballet audiences at the Mayflower, Southampton also concluded that there is little perception of company branding with decisions to attend based on the work on offer. (25)

There is generally relatively little crossover between different dance styles. Dance bookers in venues which present a wide range of dance styles are more likely to attend other non-dance events than other dance styles. Just 12% of ticket buyers at the Edinburgh International Festival attended both contemporary and classical dance styles, even though their median frequency of attendance was two dance events in a year. (10) The Chicago research reports limited crossover between ballet and contemporary or modern dance but suggests that audiences for tap, jazz dance, Broadway musicals and culture-specific dance can potentially be persuaded to attend ballet. (13) In Finland too, there is little crossover between dance forms and, indeed, little crossover between different styles of contemporary dance: 'it is actually too much of a generalisation to refer to a homogenous dance audience; one should rather refer to the various audiences who are enthusiastic about one narrow strand of all that contemporary dance has to offer'. (15)

22% of ticket buyers for dance at seven London venues had also bought for ballet over a two year period at any of the 30 venues that participated in the wider data analysis project. (28)

The qualitative element of the Scottish project also comments on a lack of crossover between dance styles. This research divides contemporary dance into two types with relatively little crossover between them:

- what the participants preferred to call 'modern ballet' referring to a range of larger scale companies including Northern Ballet Theatre and Rambert Dance Company that offer a combination of live music, visually attractive sets and costumes and a high level of skill and physicality from the dancers
- smaller scale contemporary dance that focuses on issues and lacks these visual and musical production values

The potential for crossover is identified as between smaller scale contemporary dance and contemporary theatre and between ballet and 'modern ballet'. (11)

arc Dance Company's research revealed evidence that they can persuade a ballet audience to cross over to their work which falls into this 'modern ballet' category. Audiences are twice as likely to have previously attended ballet at the venue than contemporary dance. (9)

Q: What type of other event do they come and see?

A: It is very difficult to generalise because the available research tackles the question in such different ways that it is impossible to isolate contemporary dance attenders and look at what other consistently defined artforms they attend. On the whole, they are frequent arts attenders who do not specialise in any particular artform.

Extensive analysis of box office data in Scotland identified that a ticket buyer was up to three times more likely to buy tickets for dance (including ballet) at above average frequency if they also bought tickets for all other types of event at above average frequency. The type of other event purchased depended entirely on the programme at each particular venue. (10)

Research into so-called 'lapsed' ticket buyers in the East of England identified that dance attenders were general arts lovers who attended modern dance alongside their prolific attendance of other types of arts events. (6)

19% of ticket buyers for dance in seven London venues had also bought for opera at any of the 30 venues participating in the wider data analysis project and 19% had also bought for music theatre. 39% had also bought for plays/drama. 11% had also bought for orchestral music and 12% for world music. The crossover with any other individual artform was less than 10%. 22% of ticket buyers for world music, 23% of those for live literature and 16% of those for ballet had also bought for dance. (28)

Research commissioned by Arts Council England has identified four different types of arts attender according to the frequency and range of their attendance across broad artforms:

- those whose arts attendance consists of 'Little if anything'
- those who engage 'Now and then'
- those who attend one broad artform relatively frequently, labeled the 'Enthusiastics'
- and those who attend at least two broad artforms relatively frequently – the 'Voracious'.

The groups most likely to say they have attended dance in the past 12 months are the Enthusiastics and the Voracious.

% of each attender group who say they have attended ballet and contemporary dance in the past 12 months

	Ballet	Contemporary Dance
Little if anything	*	*
Now and then	5%	2%
Enthusiastic	11%	6%
Voracious	27%	17%

(31)

How do they find out about dance events?

Q: What are the most effective communication methods?

A: Word of mouth and the venue brochure are consistently among the top ranking communication methods.

Information from different research projects is not strictly comparable as each categorises communication methods differently.

63% of respondents to research into occasional dance attenders in the East of England said they had heard about the performance through a mailing. 24% claimed that posters and leaflets available at the venue were an important source of information. 30% claimed not to regularly read a daily, weekly or Sunday paper. (6)

41% of participants in Motionhouse's questionnaire research heard about the production via 'word of mouth', 22% from a leaflet or a poster, 27% saw a venue brochure and 3% read a review or an article about the show. (16)

52% of interviewees in the Rambert 2005 research said that they heard about the event from information about the venue they received through the post. 13% cited information specifically about Rambert Dance Company they received through the post. 6% picked up information about the venue and 2% picked up information specifically about Rambert. 3% saw a poster, 3% saw a feature, review or listing in local media, 3% saw a feature, review or listing in the national media and 3% found out because they were passing the theatre. All other communication methods were cited by less than 2% if respondents. 11% of interviewees who saw a performance at Sadlers Wells and 3% of those who attended the Lowry, Salford heard by email. At other venues email was either cited by 2% or less or not mentioned at all.

Research into Birmingham's dance audiences identified the most important communications methods for all types of dance attenders as word of mouth and leaflets that have been picked up or received by post. People who booked their tickets in advance were primarily persuaded by the venue brochure, the company leaflet and other leaflets and letters received through the post. Attenders of Black dance were particularly strongly motivated by the venue brochure and attenders of popular dance by mass marketing methods including advertising in national newspapers, local newspaper advertising and posters (unlike attenders of any other type of dance). (21)

27% of visitors to Woking Dance Experience found out about the event through press advertising or editorial, 24% through a leaflet, 15% received a mail shot and 12% found out through the festival brochure. 42% found out through word of mouth. (22)

60% of arc Dance Company's research respondents found out about the performance via the venue season brochure, except in London where word of mouth and the company's own leaflet were more important. (9)

The DTP research found that the season brochure is the most important method of communication in most venues. (29)

The qualitative research that took place as part of the Destination Dance project in the West Midlands concluded that there was 'a desire among audiences for a joint approach to dance marketing through, for example, a dedicated regional dance website and a dedicated regional dance brochure, which could be mailed directly to the homes of potential audiences'. The method of recruitment for these focus groups, however, made it likely that these audiences were more committed to dance than average. (20)

Q: What kinds of communications are effective?

A: The vast majority of attenders know relatively little about dance and have strong negative pre-conceptions about contemporary dance. Clear, simple images and honest, informative copy that does not assume knowledge therefore work best.

Research into audiences for arc Dance Company identified that a key motivator is the strength of the image, particularly the brightness and colour, in the venue brochure and company print. Non-dance images in venue brochures confused participants. Those familiar with the visual language of dance preferred darker, more esoteric images while those less familiar preferred brighter, more cheerful and obvious print images. (9)

16-18 year olds also responded to bright, vibrant print but felt that there was too much print around that looked like this. They, too, were confused by images that weren't obvious. (18)

Much of the copy written about dance reinforces the feelings of intimidation experienced by frequent, infrequent and non-attenders participating in the Scottish qualitative research. They felt inadequate when they failed to recognise the names of companies or artists or understand the jargon e.g. 'vibrant new work'. They also complained that events all sound the same so they couldn't choose between them. (11)

Participants in the Scottish focus groups did not believe the copy written to promote dance events (11) and neither did many participants in the research into the attitudes of young people to contemporary dance. (18) Participants in both pieces of research were suspicious of hype and saw through unrealistic claims. For example, the heading 'If you like clubbing, you'll love K'Dar' attracted everyone's attention but some disbelief: 'It's a bit difficult to understand how nightclubbing is like sitting in a seat and watching other people do it.' (18)

It is worth noting that two pieces of research identify a refusal by participants to use the term 'contemporary dance', and a preference for 'modern dance'. (6, 11)

Focus group research involving dance attenders at mac and Warwick Arts Centre resulted in the following guidelines for marketing communications:

- Need for clarity, precision, honesty and simplicity in the language used to describe dance performances in promotional material

- Need for strong, descriptive, colourful images which give a real flavour of what is expected from the performance and which do not mislead through use of graphic effects or cropping
- Need for clear and legible text in a good point size; avoiding overlaying and complicated formatting
- Inclusion of basic and practical information about the event
- Simple design which is logical in its layout and easy to navigate
- The value for specialists of post-show discussions that provide the opportunity to talk about dance with other like-minded, informed people.
- The value to non-specialist audiences of pre-show talks and good quality, accessible programme information to aid in building confidence.
- Inclusion of all the background information about companies and artists needed to make a decision to buy in the print rather than referring people to another source, as few will consult a website or phone a help line to get additional information. It is important that the volume of information does not make the print difficult to navigate. (20)

Q: Do they book on-line or at the box office?

A: There is currently no reliable information specifically about dance audiences but in general, on-line ticketing appeals to people from the whole range of audiences at a particular venue – new, occasional, frequent and very frequent ticket buyers. People who buy theatre tickets on-line are much less likely to be aged under 25 or over 55 than either the TGI profile of audiences for any performance in a theatre or general internet users.

A greater proportion of online bookers were new or lapsed customers compared to bookers in person or on the telephone. The frequency of attendance of online bookers closely matches the frequency of attenders of any performance in a theatre in TGI. (1) Around half of on-line bookers and half of telephone/in person bookers switch between different methods of buying tickets depending on circumstances. They like booking on line because it is quicker and easier but if they need additional information will use the telephone or call in to the box office. 94% of the online ticket buyers surveyed want information about promotional offers by email, however in some venues significantly more online customers want to get the season brochure by post. (27)

What motivates them to attend dance?

Q: What prompts someone to buy tickets for a dance performance?

A: The available research offers a very wide range of responses to this question, mainly because the results of quantitative research that asks the respondent to choose from a list of options are dependent entirely on what that list consists of.

Unprompted responses

Dance attenders participating in focus groups in Scotland talked about dance being unique in offering something for all the senses. For them, the attraction lay in the combination of live music, visually attractive sets and costumes and the skill and physicality of the dancers. They felt strongly negative if an element of this combination was missing. When they talked about reasons for feeling disappointed by a dance event, they focused on lack of skill among the performers, lack of a narrative of some kind and feeling no emotional involvement. (11)

Research into attenders of contemporary arts events, including dance, at Warwick Arts Centre identified the key motivation as finding something in the brochure that 'catches their eye'. Having identified a possible event to attend, they looked at what else was going on in their lives and what they could afford. They judged quality through endorsements from critics, other members of the public and from those responsible for creating and programming the work. (8) Similarly, 'Hesitant' dance attenders participating in the arc Dance focus group research said that the most persuasive form of promotion was 'Recommendation'. (9) (The importance of recommendations is also underlined repeatedly in research involving prompted responses e.g. 55% of Motionhouse questionnaire respondents were brought by a friend or relative rather than making an independent decision to attend. (16))

Participants in the arc Dance research were asked what key emotions they looked for when attending any live performance. Their responses fell into three categories: heightened emotional state (the wow factor); an opportunity to find common ground with others and share an experience; and escapism. They tended to link quality with spectacle. The attenders of the London performances were more likely to be attracted for the first time by the dancers, the choreographer or the company itself than audiences outside London for whom recommendation and a loyalty to the venue were much more important. (9)

Prompted responses

The following responses need to be treated with a certain amount of caution because they are shaped by the options researchers give respondents to choose from. The diversity of the options in each different piece of research means that it is difficult to make valid comparisons.

42% of respondents to research amongst occasional dance attenders in the East of England said they attended what they called 'modern dance' because 'It was something different'. 38% said that 'entertainment value' was a reason for attending. 31% said that 'quality' was the motivation to attend. (6)

Participants in the Motionhouse research were presented with a list of possible adjectives to use about the performance they had seen. The five most frequently ticked were 'energetic', 'exciting', 'entertaining', 'impressive' and 'high quality'. (16)

Attenders in Chicago were also motivated by the reputation of the company or dancers but also by the venue in which the performance was taking place. Other important motivations were seeing work they hadn't seen before, ticket prices and getting good seats. In particular, attenders of contemporary/modern dance were motivated by a sense of novelty and intellectual stimulation. They also felt a stronger sense of awe, heightened emotion and spiritual uplift than dance attenders who did not attend this type of dance. (13)

29% of participants in the Rambert 2005 research said they wanted to attend the performances because of the reputation of the company, 26% because they had seen the company before, 14% because they liked watching dance in general if they had the opportunity, 13% because they particularly liked watching contemporary dance if they had the opportunity and 10% that it 'just looked interesting'. (17)

Research into the attitudes of arts attenders in Australia identified the following as key motivators for people attending modern 'ballet/contemporary/modern dance': visually appealing, uplifting, optimistic, excellence, contemporary, controversial, highly skilled, fantastic, wonderful to look at. (19)

The primary motivations of attenders of dance in Birmingham across all types of dance were a friend's invitation and the reputation of the dance company. They were also influenced by the pieces being performed. In addition, ballet attenders were motivated by the reputation of particular performers, contemporary dance attenders by the choreographer's reputation (and motivated than other attenders by the description of the work in the print), attenders of Black dance were particularly strongly motivated by the description of the work in the brochure or leaflet and popular dance attenders by reviews on TV, radio or press, the particular dance work being performed and going as part of a party booking. (21)

Half the exit interviewees at the Woking Dance Experience said that as a result of their experiences on the day they would be 'much more likely' to attend this kind of event again. Just over a third said that they would be 'much more likely' to attend another Festival event, with a quarter saying they would be 'slightly more likely' to attend another Festival event. However, many interviewees seemed unaware that the Experience day was the launch event for the Festival. Around a third of those who said they were only slightly more likely to attend another event or whose intentions were unchanged by the event said that they were already involved in dance anyway. (22)

Q: What stops someone buying tickets?

A: Feelings of intimidation

Research in Scotland identified that even frequent dance attenders feel uncomfortable talking about the artform and are worried that they will seem stupid or ignorant because they do not understand the performance. Participants perceived this feeling of intimidation as a primary barrier to attendance by others. (11)

Why is this such an issue with audiences? Researchers measuring enjoyment of contemporary dance point out that, according to Sigmund Freud, the content or subject matter of an artwork is the most potent source of pleasure because, by interpreting it, viewers can identify with the content and project their own wishes and desires onto it to gratify their unconscious tensions. More recent studies emphasise recognition, understanding and meaningfulness in aesthetic pleasure. The researchers comment 'if dance audiences cannot make sense of a work, the most potent source of pleasure or enjoyment may be unsatisfied'. (12)

The research showed that in reality, lack of understanding is not a problem. Regardless of their experience and expertise of dance, 90% of the participants in the research were able to achieve some level of insight into the dance work they saw. They most often used the visual, aural and movement elements to form an interpretation of the more representational dance work in the research, while the spatial relationship between the dancers and between the dancers and the set and props was most often used to interpret the abstract work. The information sessions did not affect their ability to make an interpretation but they did impact on the content of that interpretation. Those that did not manage to interpret the work said either that they chose not to or that they needed more time to gather their thoughts. (12)

The challenge we face in marketing contemporary dance, then, is that many people have a strong preconception that they won't understand a dance work – a perception that is usually not borne out in reality. However, the researchers point out that the process of being involved in the research gave participants time to reflect on the work – and many respondents took twice as much time as expected to do so. They were also told that there were no right or wrong response and that all responses were valid. (12) Perhaps the high levels of anxiety felt by even the frequent attenders of dance involved in the various research projects described in this overview are caused by the perception that their own interpretation of a work is likely to be wrong because it will not match that of other audience members, the performers and its creator.

A: Aversion to risk

Attenders of contemporary dance who participated in the Scottish research were just as risk averse as non-attenders. They took carefully calculated risks based on background information about the company, dancers, choreographer and music. If this information was not available, some enthusiasts would search for it on the internet but most would choose not to attend. (11)

A: Negative pre-conceptions about contemporary dance

Rambert commissioned focus group research into barriers to attendance at their productions by ticket buyers for ballet. Participants were motivated to attend ballet by its familiarity. They perceived that ballet had the following characteristics:

- Familiar classical music
- A romantic theme – with a high proportion of pas de deux.
- Lush, colourful costumes – not necessary tutus but certainly period and recognisably classical ballet
- Large, intricate sets (not necessarily realistic) and plenty of colourful lighting.
- Good seats
- A full auditorium.

The perceived that contemporary dance (or 'modern' dance as most participants referred to it) did not have these characteristics and in contrast consisted of:

- Difficult music – not familiar and not classical
- Everyday clothes
- Aggressive themes and music with sharper, less flowing movements
- No sets
- No plot
- Improvised movements (no structure or chorus work)
- People dancing on their own
- Unpopular
- People of all shapes and sizes (which most said as a compliment).

The authors comment that: 'The three most important motivations were escape, emotional intensity, and social connection. Ballet scores very highly for escape and emotional intensity. Contemporary dance does not because it is deemed not to have a plot, and if it does it is too rooted in the real world to provide a means of escape. Generally, any kind of theatre scores quite low with social connection unless a drink or a meal is involved.' (5)

Preconceptions were also a barrier to attendance by participants in research in Hampshire. Their stereotypes were largely created by channel hopping on the TV and by the leaflet for the particular performance. They believed that contemporary dance would consist of:

- very few people dancing
- fairly minimal music

- not colourful
- very abstract
- no clear story 'you just open your mind and interpret how you feel about the dance'
- difficult to make sense of
- intellectual not emotional (and they felt the performance they saw was 'emotive'. (24)

A: Expectations of perfection

Participants in the Scottish research wanted to be impressed by the skill, talent and grace of the performers. They wanted what they called 'perfection' and saw dance that did not achieve this as 'amateurish'. A barrier to attendance was the absence of a guarantee that the standard of performance would match their expectations of 'perfection'. (11)

Research in Australia identified the key barriers to attendance as: perceptions that it is too way out, not real ballet or an 'abortion' of ballet or an insulting to classical form; a lack of appreciation of skill; a belief that it is expensive or too challenging and a low awareness of what is available locally. (19)

A: Otherwise engaged

Participants in arc Dance's focus groups said that they could often not attend the performances they wanted to because they were not available on that particular night. (9) This was also identified as the primary barrier to attendance once participants in the Scottish qualitative research had decided they were interested in a particular dance event. (11) People who had not attended dance in Chicago in the past 12 months also said that the primary barrier to attendance was being 'too busy' along with a preference for other artforms. Parking difficulties and other 'hassles' were also an issue.

A: Price

Price was only a barrier for very frequent arts attenders participating in the Scottish research when they had to make a choice between several events that they were interested in. Price was part of an assessment of the relative value for money of different events. Even £8 or £9 was too much to pay when they believed there was no guarantee of quality. However, a low price actively signalled poor quality to many participants. (11) 'Newcomers' to dance participating in focus groups were willing to take risks but only if the price was low enough (£6 - £8 in 1997). (24)

Of the attenders of various types of dance in Birmingham, only ballet attenders said that they would 'attend dance performances more often if the price of tickets was lower'. (21)   Research into audiences at the Mayflower, Southampton identified that price was not a deterrent except among lapsed attenders. It was seen as possibly deterring others from more frequent attendance.

A: Young people

16-18 year olds found it difficult to explain what was meant by contemporary dance and saw it as something for their parents' generation. Those who had not previously attended an event believed that they would be unable to socialise with friends and that it would be too serious, lacking in atmosphere and too expensive. They responded very positively to a video of a dance performance as lively and energetic and recommended that people in their age group need similar opportunities to sample the work before they will buy tickets. After seeing the video their attitudes towards contemporary dance changed and they now saw this type of contemporary dance as a group event where you can have 'fun' with your friends. (18)

Participants had not previously seen publicity material unless a parent was on a venue mailing list. They felt that contemporary dance was not marketed in the right places to reach their age group. In fact the leaflet had been distributed throughout the town and even to their school. Their preconceptions that contemporary dance was not for them had meant that they had 'filtered the print out'. The author of the report concludes that 'print alone will not convert non-attenders into attenders'. He also points out that the school had been sent a CD-ROM but that this had not been shown to students who might have been stimulated to make an independent visit to the performance. (18)

Young men involved in performing arts courses at school were motivated to attend contemporary dance by having peers to go with, being given information that showed them it was 'right up their street' and by connections with 'cool' contemporary popular culture. They would rather go in an all male group. They responded very positively to a video of the work – particularly because it proved that the dancing would be 'physical'. They also responded positively to male presenters. (24)

Q: Are the motivations of new attenders any different?

A: New attenders can be persuaded to attend by recommendations by friends and family, price promotions and targeted communication

The authors of the Scottish qualitative research report comment: 'It is difficult to overestimate the importance of other people in introducing first time attenders to new arts experiences, including dance' however they identified that attenders did not see dance as something to take their friends to. (11)

Focus group research into non-attenders at Rambert Dance Company who buy tickets for ballet reveals that they could be persuaded to attend for the first time if the price was low enough for them not to be forced to choose between this and any element of their existing arts attendance. £10 appeared to be the most they would pay for something 'risky'. (5) The Chicago research also revealed that those already frequently attending the arts felt they couldn't afford to increase this activity to attend more dance at 'standard prices'. (13)

English National Ballet's project to attract first time attenders to the company through targeted promotion increased the audience for the triple bill by 47% compared to non-'Affair' nights. Around 60% of the audience had never seen ENB before. (23)

The Company's deliberate choice of three diverse short ballets worked well with audiences commenting that they were attracted by the opportunity to see a variety of ballet. The 'slightly bawdy' tone of voice of "Living Dangerously: start an affair with English National Ballet" was seen as unintimidating and Angela Rippon's introductions to the ballets were seen as reassuring because they were 'not too highbrow'. The self-completion questionnaires identified that posters attracted 13% of the audience and leaflets 33%. The mailings and presentations to staff in John Lewis and Sainsbury's stores, hospitals, the emergency services and local government yielded good returns. The ticket promotion in the Yorkshire Evening Post yielded 37% of bookings in Leeds. (23)

The ticket price of £7 - £10 was seen as a bargain but those indicating that they would come and see the company again said they would be happy to pay up to £20 for tickets in future. Students and schools, however, were not willing to pay £7 as schools matinees were available at £4. It was also difficult to generate party bookings. (23)

'Newcomers' to dance participating in the Hampshire research were willing to try contemporary dance again but they would choose what to attend carefully, basing their decision of the image for a specific production. They were still not open to contemporary dance in general and would need reassurance, for example from a friend. (25)

The opportunity to experience the work before deciding whether to see it does seem to encourage attendance. It is difficult to consistently prove a direct and immediate link between an audience member seeing one of Motionhouse's 'satellite performances' and attendance at the full-length work, but their most recent audience research does provide evidence that the satellite performances reach potential new audiences, raise awareness and create a positive intention to see the work (29% said they would definitely seek out a performance and a further 56% said they would consider going). 70% of respondents had never heard of the company before. 2% of people who saw *Perfect* and filled out a questionnaire at that performance said they had seen *Chaser*. This may indicate that the impact of the satellite performances is more long term because the interval between the satellite and full-length performances is relatively short. (26)

	Ballet	Tap	Jazz	Modern or Contemp.	Broadway musicals w/dance	Culture-specific dance
Seeing something beautiful	++	-	-	o	o	+
Being entertained	o	o	o	o	o	o
Feeling excited	o	-	o	o	-	+
Seeing something new or surprising	-	+	o	++	o	o
Being intellectually challenged or stimulated	o	o	o	++	o	o
Being transported elsewhere	+	+	+	+	-	++
Feeling relaxed	+	-	o	o	-	+
Feeling awed	o	-	+	+	-	+
Being spiritually uplifted	o	++	++	++	--	++

KEY:
"++" means much more likely than average
"+" means more likely than average
"o" means average likelihood
"-" means less likely than average
"- -" means much less likely than average

Q: What prompts someone to choose one dance event over another?

A: Decisions are based on the benefits that potential attenders believe they might get out of a particular dance event. That decision is based on the pre-conceptions triggered by the available images and information. In effect, each dance event is competing for the available time and enthusiasm of the potential attender against every other event on offer, whatever the artform.

A: Participants in the Scottish qualitative research believed that smaller scale contemporary dance rarely offers any of the benefits these participants associate with dance i.e. the combination of live music, visually attractive sets and costumes and the skill and physicality of the dancers. Those that did not already attend smaller scale work did not see it as a medium for ideas and issues. (11)

The Chicago research sets out the different benefits of dance sought by attenders of different types of dance:

Q: When do they buy their tickets?

A: It depends on the general booking patterns at each venue and on the type of attender being targeted.

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

35% of respondents to the Motionhouse surveys at *Volatile* and *Fearless* bought their tickets on the evening of the performance. This dropped to 19% for attenders of *Perfect.* 29% bought more than a week before the show compared to 48% for *Perfect*. 34% of *Perfect* attenders booked in the seven days before the show. (16 & 26)

The arc Dance Company research shows that booking patterns vary considerably between theatres. Two thirds of tickets for the performances at The Hawth, Crawley and the Queen Elizabeth Hall, London were made less than three weeks before the performance compared to one third of tickets at the Wycombe Swan, the Ambassadors Theatre, Woking and Wimbledon Theatre. 40% of bookings at the Queen's Theatre, Barnstaple were made less than two weeks before the performance. At Wimbledon Theatre one third of bookings were made at least ten weeks before the performance, a far bigger proportion than at the other venues. (9)

Ticket buyers for dance at seven venues in London were much less likely than ticket buyers in general to buy their tickets more than 28 days before the performance and on the day of the performance. They were much more likely to buy the day before the performance and between 2 and 28 days in advance. (28)

Q: What are potential dance attenders like?

A: On the whole, potential dance attenders are like dance attenders who haven't attended dance yet.

A: Research in Chicago identified fewer differences than expected between the arts attendance and attitudes of attenders and non-attenders of dance in the past 12 months. The differences were that attenders were more likely to have ever attended some form of dance event and much more likely to have participated in dance classes as a child (although they were only slightly more likely to have attended dance performances as a child). Attenders went to art galleries and exhibitions, opera and theatre more frequently but both groups attended music just as frequently. Attenders were more likely to participate in creative activities and to enjoy avant garde performances. Non-attenders were more likely to say that they wanted to know what to expect when attending performances and to say that the most important aspect was that it should be fun and entertaining.

Respondents who had not attended a dance performance in the past 12 months were divided into three types:

Type	Growth Potential	Description
Dance curious	High	Have attended dance in the past at moderate frequency and are strongly interested in doing so in the future. They can be persuaded to attend by access to marketing materials containing better information and if the practical barriers of lack of time and the hassle of booking were overcome. Are price sensitive and need nurturing as they currently say they don't get adequate information.
Arts fans	Moderate	Frequent arts attenders who prefer other artforms but say they enjoy dance but are too busy to attend. Many say more information would persuade them to attend more often. Not price sensitive.
Dance blind	Low	Prefer other arts activities and do not enjoy dance (and almost all had attended a performance at some point in their lives). Low exposure to dance as a child. Twice as many men as other segments. A tiny proportion might be persuaded by dance/theatre packages.

(13)

Research in Scotland identified that non-attenders and attenders of dance were motivated to attend performing arts events by remarkably similar things: feeling enthralled by a performance; sharing an emotional experience with the performers and the rest of the audience and being part of a unique live event. (11)

Qualitative and quantitative research in Australia suggest that potential attenders could be persuaded to make a visit if: 'modern dance' was presented as approachable, and **Error! Bookmark not defined.**, not difficult to understand, not highbrow, intellectual or too confronting and if the real skills of the dancers and their expertise were stressed. (19)

Details of Research Reports

1. **BMRB, Target Group Index 2007: Area Profile Reports (London: Arts Council England, 2008)** and **Peter Verwey, Target Group Index 2003/2004: Summary of results for Great Britain (London: Arts Council England, 2005)**

   BMRB International collects information each year from 25,000 – 26,000 adults in England, Wales and Scotland via a self-completion questionnaire booklet including questions about their attendance at 10 art forms. These adults are representative of the population of the UK. Target Group Index (TGI) data is significant because it is possible to relate information on theatre attenders to all other information obtained in the survey including the products they buy or use, their readership of newspapers and magazines etc. The information from TGI is made available to arts organisations funded by the arts councils of England, Scotland and Wales in Area Profile Reports which relate it to census statistics for the population within a particular drivetime.

2. **NFO System Three, Attendance At, Participation In and Attitudes Towards the Arts in Scotland 2001/2002, (Edinburgh: Scottish Arts Council, July 2002)**

   This research involved in-home interviews with 2,007 people throughout Scotland. This sample was representative of the Scottish adult population in terms of sex, age, social class and where they live.

3. **Peter Verwey, Attendance at Arts Events by People in AB Social Grades in Particular Occupations, (London: Arts Council of England, 2000)**

   An analysis of the Premier TGI surveys 1995-1999 carried out by BMRB

4. **Peter Verwey, Arts Attendance Related to Other Participation/Consumption, (London: Arts Council of England, 2001)**

   This analysis is also based on TGI using the 1998/9 and 1999/2000 surveys. It shows the extent to which people who attend arts events consume particular leisure goods and services.

5. **Anne Roberts and Tim Baker, Rambert Dance Company Research Report, (unpublished, 2001)**

   The project had three elements:

   - The analysis of customer data held on the box office computer systems at the Theatre Royal, Norwich (TRN) and Sadler's Wells, London (SW) involving ticket buyers at their four most recent visits from 1997 to 2000. There were 3,094 ticket buyers at TRN and 10,386 ticket buyers at SW.
   - Two focus groups in Norwich and two in Plymouth recruited from people who had attended ballet but not performances by Rambert Dance Company.
   - 50 telephone interviews with people who had expressed interest in a Friends Scheme.

6. **Erica Littlewood, *Lapsed Contemporary Dance Attendees*, (Cambridge: Eastern Touring Agency, 1995)**

This research involved telephone interviews with 328 people who had bought tickets for contemporary dance at one or more of five participating venues in 1992 but did not buy tickets at any of the five venues in 1993.

7. **Anne Roberts, *Qualitative Research into Contemporary Dance Attendance at Warwick Arts Centre*, (Warwick Arts Centre, 1997)**

   This qualitative research identified four typologies to describe the range of people attending contemporary dance at the venue.

8. **Anne Roberts*, Nothing by Chance* (Warwick Arts Centre, 1996)**

   This qualitative research explored the attitudes and motivations of attenders at contemporary theatre, dance and film at Warwick Arts Centre.

9. **Tim Baker, Beth Aplin, Anne Roberts, *arc Dance Audience Research*, (unpublished, 2002)**

   The project involved an analysis of box office data from eight venues on arc's Spring 2001 tour and a series of six focus groups with actual and potential attenders.

10. **Tim Baker and Heather Maitland, *Profile of Dance Attenders in Scotland: Box Office Data Analysis* (Scottish Arts Council, 2002)**

    The research analysed data about 43,848 people buying a tickets at 8 venues from 1999 to 2001 for 528 dance events, estimated to represent 70% of professional dance performances in Scotland during that period.

11. **Tim Baker and Heather Maitland, *Profile of Dance Attenders in Scotland: Qualitative Research Report* (Scottish Arts Council, 2002)**

    Six focus groups were held as part of this research project consisting of a dance attender and non-attender group at each of three locations: Inverness, Aberdeen and Edinburgh.

12. **Renee Glass and Catherine Stevens, *Making Sense of Contemporary Dance: An Australian Investigation into Audience Interpretation and Enjoyment Levels* (fuel4arts, 2005)**

    The researchers made a psychological evaluation of the responses of 472 participants to live performances of new Australian contemporary dance works. One work was abstract and the other was more representational. 37% of the participants were given specific information about the work before the performance, 21% were given generic information about contemporary dance and classical ballet and 42% were given no prior information. The project looked at the impact of prior information on audience enjoyment and insight.

13. **Slover Linett Strategies, *Dance Audience Survey Final Report* (Chicago Community Trust Excellence in Dance Initiative Dance Development Project, 2004)**

    This project consisted of 550 telephone interviews with attenders and non-attenders of dance in the past 12 months. The sample was drawn from the mailing lists of a wide range of the city's arts organisations. Cluster analysis was used to segment respondents into seven types.

14. **T.J. Cheney Research Inc, *Facts on Dance: Then and Now – and Now What?* (Canada Council for the Arts, April 2004)**

    http://www.canadacouncil.ca/publications_e/statistics/st127276333609375000.htm consulted 2/11/05

The data is taken from the Performing Arts Survey carried out by Statistics Canada which covered not-for-profit professional performing arts companies only.

15. **'Research on the Finnish Contemporary Dance Audience', *Finnish Dance in Focus 2003*, (Finnish Dance Information Centre)**

http://www.danceinfo.fi/english/focus/focus2003_2 consulted 2/11/05

This article consists of an analysis and interpretation of statistics collected in across Europe by Eurostat and the first questionnaire research carried out into dance audiences in Finland published in 2003 although it is based on a relatively small number of responses (801) from attenders at the Dance Arena festival in 2000.

16. ***Motionhouse Audience Factsheet* (Motionhouse, 2005)**

The factsheet is a summary of the results of self-completion questionnaire surveys of audiences for *Fearless* and *Volatile*. The response rate was low at 12%.

17. **Tina Neil, *Audience Survey Report, Rambert Dance Company*, (Cultural Intelligence, 2005)**

This research consisted of 1,369 telephone interviews with ticket buyers for Rambert's performances at the nine venues on the 2004 Autumn tour. Interviewees were selected at random by computer. Participants were also to describe the other people they bought tickets for. The responses were weighted according to the proportion of tickets sold for the tour by each venue. When comparing venues, the unweighted samples were used.

18. **Eric Orme, *Attitudes to Contemporary Dance Among Young Adults*, (Arts Marketing East, 2000)**

Commissioned by Suffolk Dance, the research involved two focus groups of 16-18 year olds containing equal numbers of males and females at a community college in the county.

19. **Woolcut Research Pty Ltd*, Selling the Performing Arts: identifying and expanding audiences for music, dance and theatre* (Australia Council, no date)**

This research consisted of 64 in-depth qualitative face-to-face interviews and 1,000 quantitative telephone surveys carried out in 1996/7

20. **Gwen van Spyk, Destination: Dance Final Report, (Audiences Central, 2005)**

Two focus groups with existing ticket buyers for dance plus audience surveys at Destination: Dance performances took place in 2002 and again in 2004. No information about response rates to the audience surveys is available.

21. **Birmingham Arts Marketing, *A Study of the Birmingham Dance Market* (2000)**

Following analysis of secondary research, this project compared 529 questionnaires completed by audiences for four different types of dance: ballet, 'contemporary dance', 'Black dance' and 'popular dance'. It also compared people who booked in advance and those who bought tickets on the day or on the door. Response rates were low, ranging between 4% and 20% so respondents are likely to be those particularly enthusiastic about dance or loyal to the venue.

22. **McDonnell Spence, *Project Experience: Woking Dance Festival Experience Day – audience research*, (2005)**

Face to face interviews were conducted with a sample of 63 out of 412 visitors to the Experience Day, a programme of demonstrations, participatory workshops and multi-media presentations by community and professional companies designed as an introduction to dance. Half of these were interviewed on entry and half on exit.

23. ***Live Dangerously – start an affair with English National Ballet: report on English National Ballet's 'Affairs Nights" in Southampton, Manchester and Leeds*** **(English National Ballet: 1996)**

This is an evaluation of ENB's 'Affairs Nights' project designed to attract 'a full house for new ENB attenders' to the company's triple bill programmes. The evaluation consisted of self-completion questionnaires (response rates 17%, 28% and 45% and qualitative telephone interviews with 100 attenders.

24. ***Contemporary Dance: 'newcomers' focus group research*** **(Arts Marketing Hampshire, 1997)**

The research consisted of three focus groups of people who had identified themselves as 'newcomers' to dance when recruited.

25. ***Opera and Ballet at the Mayflower Southampton*** **(Arts Marketing Hampshire, 1997)**

The programme of research involved box office data analysis, qualitative and quantitative research. No information is available about response rates to the audience questionnaires.

26. ***A study of audience attitudes towards Perfect and Chaser – January to July 2005*** **(Motionhouse Dance Theatre, 2006)**

Chaser was a short 'satellite production' designed to introduce dance in general and specifically the full-length production *Perfect* to users of non performance spaces such as shopping centres. Motionhouse pioneered the use of this audience development method. The research consisted of postcard questionnaires handed out to people who stopped to watch *Chaser* (311 responses) and longer questionnaires handed out in venues to audiences for *Perfect* (522 responses). Ten respondents to the *Chaser* postcard were telephoned for a follow-up qualitative interview.

27. **Heather Maitland,** ***Research into On-line Ticket Purchasers 2004*** **(ts.com, 2005)**

Eighteen organisations sent out email questionnaires, gathering 6,931 responses. In addition, for a two week period, two organisations asked their online customers to respond to a short questionnaire at the end of the ticket buying process. They asked their telephone and counter customers three core questions for the same two week period.

28. ***Audiences for Dance in London*** **(Audiences London, 2005)**

This report was commissioned from Audiences London by Arts Council England and is based on analysis of the Snapshot London data initiative, December 2005. The research analyses box office data about customers from 183,000 households with GB postcodes from seven London venues with extensive dance programmes. It covers 1,678 performances between September 2003 and August 2005, excluding those coded by the venue as ballet or as participatory activities.

29. **Beth Aplin and Heather Maitland*****, Research into Audiences for Dance: summary report,*** **unpublished report, 2007**

The project consisted of two years of action research working with marketers at Dance Touring Partnership member venues to research audiences across three tours and compare them with audiences for other types of event plus a 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

30. Catherine Bunting et al, *Informing Change: taking part in the arts: survey findings from the first 12 months, (*London: Arts Council England, 2007)

The Taking Part rolling survey is commissioned by the Department for Culture, Media and Sport (DCMS) in partnership with Arts Council England, Sport England, English Heritage and the Museums, Libraries and Archives Council. It has been running since July 2005. Every year, Taking Part collects information from around 29,000 adults (aged 16 or above) in England about their engagement in culture, leisure and sport in the 12 months prior to the interview. The data is collected by BMRB Social Research in face-to-face interviews. All analyses in the report are based on interviews with 28,117 adults issued between mid-July 2005 and mid- July 2006.

31. Catherine Bunting et al, *From Indifference to Enthusiasm: patterns of arts attendance in England*, (London: Arts Council England, April 2008)

This report is based on a deeper quantitative analysis of data from the first 12 months of the Taking Part survey (see research report 30 above) to develop a more detailed understanding of the nature and intensity of peoples' involvement with the arts.