

National Theatre

Developing Drama Audiences



A Toolkit

Led and supported by National Theatre, in collaboration with Theatre Nation Partnerships,
primarily led by Curve Theatre. Created by Indigo Ltd.

indigo

This toolkit, along with the extensive research report it's based on, is the outcome of a collaborative and research-led approach to audience development across the Theatre Nation Partnerships network. Launched in 2017, this initiative is supported using public funding by the National Lottery through Arts Council England, brings together 13 arts and cultural organisations across England.

Theatre Nation Partnerships, which ran from 2017-2025, aimed to strengthen connections with local audiences, schools and communities in culturally underserved areas. We value the role of new audiences in theatre and strive to create more opportunities for people of all ages to engage with arts and culture nationally.

Across the network, there was a consensus to a deeper understanding of audiences who both attend, and do not attend, live drama. In response, our working group on research and evidence, which we co-chaired, commissioned Indigo-Ltd to take a deep dive into drama audiences across and beyond the TNP network and create a toolkit which can be used to support theatres and their teams to grow, retain and attract new audiences.

We hope that this toolkit will be of value to theatres across the UK interested in building their audiences and connections into their local communities.

We must also thank the venues outside of our network who have contributed to these findings: their involvement demonstrates the importance of this research for our industry. The generous collaboration of Belgrade Theatre, Birmingham Rep, Chichester Festival Theatre, Liverpool Everyman & Playhouse, Northampton Royal & Derngate, Northern Stage, Nottingham Playhouse, Royal Exchange Theatre and Sheffield Theatres has allowed us to draw from an even wider set of Box Office data to achieve exceptional insights from across the sector.

Kiri Grant: Head of National Partnerships, National Theatre

Claire Ward: Executive Director, Curve

This Toolkit and the research that informs it were carried out by Indigo Ltd (www.indigo-ltd.com) in 2024 on behalf of the National Theatre and its partners.

With thanks to the following venues for contributing data and insight:

- Belgrade Theatre, Coventry
- Birmingham Rep
- Cast, Doncaster
- Chichester Festival Theatre
- Curve, Leicester
- Landmark Theatres, Devon and Peterborough
- Liverpool Everyman & Playhouse
- Lowry, Salford
- Northampton Royal & Derngate
- Northern Stage, Newcastle-upon-Tyne
- Nottingham Playhouse
- Queen's Theatre Hornchurch
- Regent Theatre & Victoria Hall, Stoke-on-Trent
- Restoke, Stoke-on-Trent
- Royal Exchange Theatre, Manchester
- Sheffield Theatres
- Sunderland Culture
- Sunderland Empire
- Theatre Royal Wakefield
- Trowbridge Town Hall
- Wolverhampton Grand Theatre

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Introduction

Developing audiences for drama in theatres around England has been a subject of discussion for some time. Post-pandemic, although many parts of the performing arts sector have rebounded well, touring drama may present continued challenges for regional theatres, especially as they seek to find new audiences and look to the future.

This Toolkit was commissioned as part of the Theatre Nation Partnerships, a network of UK theatres led by the National Theatre, who work together to create opportunities for people to engage with theatre.

To inform the Toolkit, primary research was carried out with audiences, including a survey and focus groups, and interviews were conducted with a range of Theatre

Nation Partner venues. In addition, drama and (where relevant) musicals sales data from the last five years was provided by Theatre Nation Partners and many other large regional producing theatres.

The Toolkit is targeted at programmers and marketers. It walks through the process of programming and planning a marketing campaign for drama (although many of the ideas may well be useful for other genres of work), with a focus on developing new audiences. It contains ideas and inspiration based on the insight gathered during the project, as well as case studies and practical tools, templates and checklists to download.

We hope it will provide information and inspiration and help touring drama thrive into the future.

Guide To Contents



Ideas for developing drama audiences, based on audience insight



The data and insight underlying the ideas



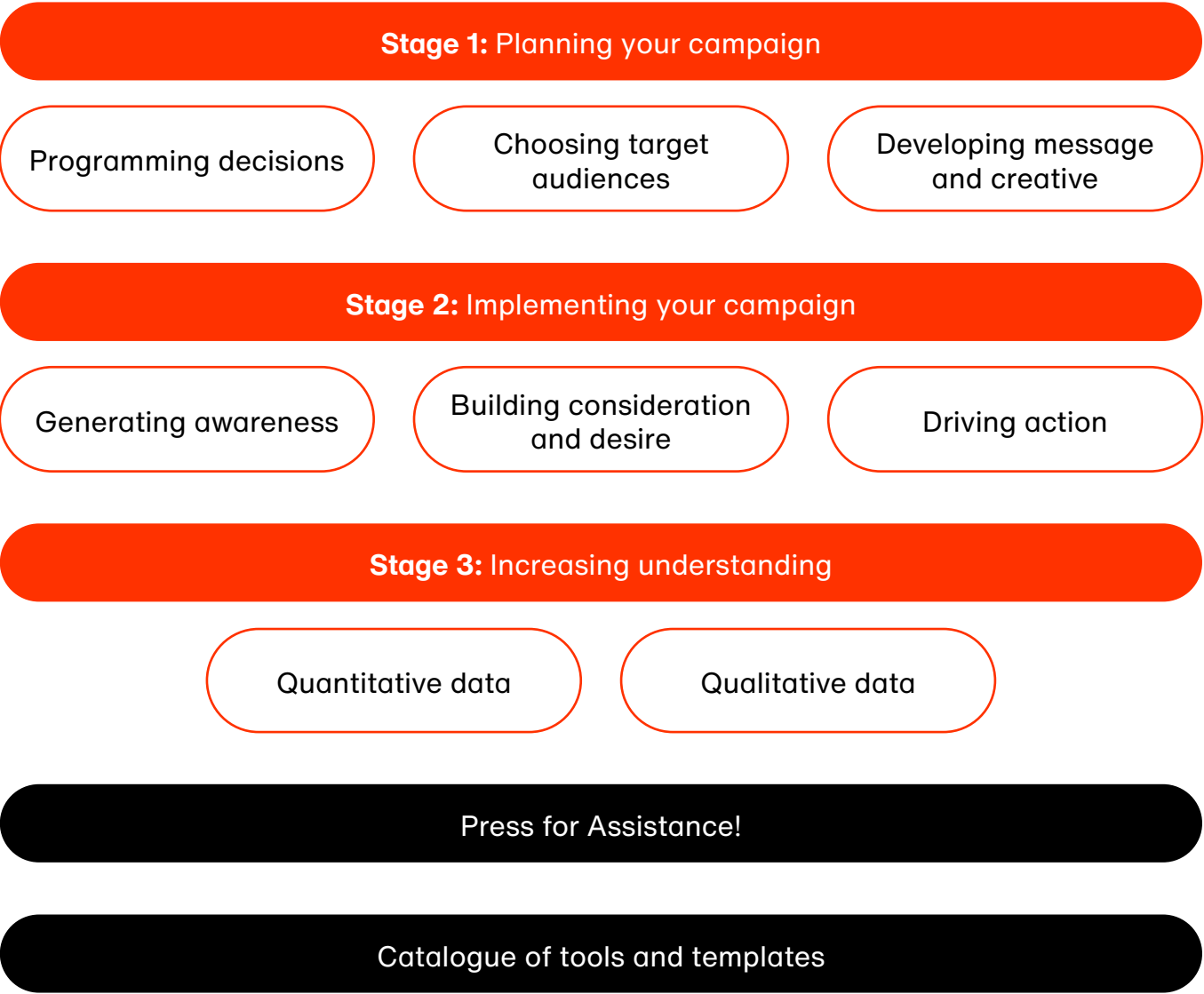
Case study examples of ideas in practice to inspire you



Templates and tools you can download and use

Toolkit Roadmap

The Toolkit is designed either to be worked through in order as you plan a campaign, or to pick and mix to get insight and inspiration as your campaign develops. And if you're stuck and need some new ideas now, head straight to Press for Assistance! to health-check your campaign and find new ideas to try.



Definitions

Within this Toolkit, we refer to drama non-attenders and drama attenders. We used musicals as the closest adjacent artform for the purposes of comparison in the research.

Drama non-attenders means those audiences who never or rarely attend drama but do attend other types of live performance, for example musicals or stand-up comedy.

Drama attenders are those who often or always attend drama. Of course, these audiences, too, are very likely to attend a range of other types of performing arts.

Therefore, “**drama audiences**” should not be seen as a homogenous group. In fact, there is a huge crossover between drama and other artforms: our research found that most people (74%) went to **both** drama and musicals. Only 16% of musicals attenders never or rarely went to drama.

We use other terms interchangeably with **drama non-attenders** in this Toolkit where it feels more appropriate language: **new audiences** or **potential audiences** for drama.

Useful Documents

Understanding Drama Attendance: [full insight report \(2024\)](#)

Indigo Share: [Hot Topic *Tomorrow’s Audience* \(research on first-time attenders to the performing arts, 2024\)](#)

Stage 1:

Planning your campaign

In this section, you can find insight-informed ideas that will help you plan campaigns which develop new audiences for drama.

Programming Decisions

How can programming decisions influence audience development for drama?

Choosing Target Audiences

Using audience insight to inform decisions around target audiences. Around 20% of drama non-attenders are “just not interested” in plays, but the others could be tricky – but possible – to persuade, or ready and waiting.

Developing Message and Creative Concepts

What our insight tells us about crafting messages and creative to sell the show.



Ideas



Insight



Case Study



Tool/Template

Programming Decisions



‘Light entertainment’ options in the programme can create a gateway into drama for new audiences; this could influence both programming and communications.



All attenders said they were likely to prefer watching ‘light entertainment’ versus ‘gritty drama’. Although these terms were not defined specifically in the research, the language used to describe shows could tap into this preference when relevant. Non-attenders also have a slight preference for light entertainment vs gritty drama when watching TV, but drama attenders prefer the harder-hitting shows, showing the potential for these audiences to be more open to more serious drama in the theatre.



Theatre Royal Wakefield has built drama audiences with deliberate attention to audience preferences. By starting with accessible, light-entertainment leaning drama, they have increased regular audience five-fold over the last few years.



Film and book adaptations provide a strong opportunity to target new audiences; finding space in your programme for these familiar titles can help reach new audiences.



72% of drama non-attenders said a film or play adaptation would encourage them to book. This was a higher percentage than those encouraged by knowing the actors (around half if they know them from TV or film) – even if they were a particular fan (65%).



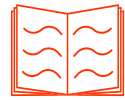
The balance of programming can lean on **specific sub-genre** triggers to attend (which also appeal to drama attenders) in a mixed programme, consciously attracting new audiences.



The productions with the most appeal were, in order: murder mystery, high profile/West End provenance, classic comedy, family, and true-life stories where they were new writing. Curriculum-based drama appealed much more to drama attenders, with only a quarter of non-drama attenders saying they were likely to attend compared to 52% of drama attenders.



‘Be selective’ in programming for and targeting productions at new audiences: encouraging them to come to something more challenging, serious or long may put them off drama even more.



Non-attenders worried that plays might be depressing:

- “I tend to avoid the serious depressing looking modern ones about hard-hitting topics”
- “If it’s sad, I won’t see it”
- “If I’m not enjoying it, I think I might get a bit bored”

They prefer escapism:

- “It’s a really nice bit of escapism for me. I love having just that time of a week that I can have two, three hours away”



Regularly scheduling drama performances helps build a consistent audience base. Given that a third of new audiences only engage with culture between one and three times a year, this suggests perhaps one opportunity per season to see drama. Having a balanced programme that includes both accessible and more serious drama can cater to a broader audience.



Longer runs of shows allow for word-of-mouth to build, increasing attendance over time, but can present financial challenges.



38% of drama non-attenders go to things because they love the venue.



Lowry in Salford has built up a strong reputation for drama over many years. This clear brand identity helps to differentiate its offer from other competing or comparative venues in Manchester and the region.

Choosing Target Audiences



Some **audience types** can be common to both current drama audiences and new ones, so rather than base your targeting on drama attendance alone, consider any other behaviours or attitudes that you might be able to identify. If you aren’t sure which type fits which audience member on your database, try multiple approaches and see which work, increasing your knowledge of your audiences.



We found a range of “types” of audience member which were common across both drama attenders and non-attenders. This was based on their attitudes, motivations and sense of their own identity, which were all more relevant motivators for attending than genre.

Ideas for choosing target audiences

1. The Theatre Fan

“I’m known in the office as the theatre person to go to. Everyone thinks I’m **the theatre guru**.”



Find them on social media. Offer exclusive access to content or an open dress rehearsal so they can demonstrate their expertise to their peers.

2. The Happy Soloist

“Quite a lot the time I just fancy it, and I’ll just go **see it on my own**. That’s fine.”



People who are happy to attend alone. Find them by their booking history. Create single seat special offers: make it easy and acceptable to attend drama alone.

3. The Arts Experimentalist

“I’m **open to anything**: modern performances, shocking. I can say that I watched a performance where a pregnant ballerina was pulled by her leg on the stage, and it was absolutely brilliant.”



Find them through their eclectic and out-there booking history or by reaching out via other experimental organisations. Tell them about avant-garde new drama you have on offer (they may not like more traditionally staged plays).



Create **distinct target audience personas** for risk-takers and tried-and-trues and differentiate your messaging for each.



Start your communications earlier to new audiences to allow time for them to build up knowledge, familiarity and understanding. This may be particularly helpful when existing points of familiarity are limited and audiences need even more of an introduction.



34% of drama regulars are happy to take a risk and try something different (vs 21% of non-attenders), whereas 41% of drama non-attenders prefer something they know and like (vs 19% of drama attenders).



Consider what **popular cultural references** you choose in your campaigns as well as the images you use to reflect younger audiences.



Drama non-attenders in the survey research were more likely to be under 50 than current drama attenders (31% vs 17%).



Assess the **accessibility** of your venue and the performance to ensure you can meet the needs of new audiences.



Drama non-attenders were **more** likely to be disabled than those attending drama (21% vs 15%)



Avoid slipping into the shorthand of “drama audiences” as one distinct group: there are other factors which might be more useful to differentiate who you’re targeting.




Just because a musical attender doesn’t come to a play the first time of asking doesn’t mean they never will - **keep trying!**




Drama and musicals audiences are not mutually exclusive. 88% of drama attenders also went to musicals; 48% prefer them.


Benchmarks



Use **sales data benchmarks** to plan and set targets. The data below is from c.11 venues across England based on either sales data from 2019-2024 (*) OR data from Theatre Nation Partnerships midscale drama tours in 2023 and 2024 (†).



Benchmark	
Average capacity for drama*	57%
Average capacity for drama by quarter*	
Jan – Mar	59%
Apr – Jun	52%
Jul – Sep	60%
Oct – Dec	58%
2024 Average price paid per ticket for drama (vs £27.26 for musicals)	57%
% musicals audiences who attended drama at same venue within two years*	24%
% audiences attended both drama and musicals at the same venue within two years*	12%
Frist time bookers †	30%
% volume sales once show has opened (including on the day of performace) †	30%
% value sales once show has opened (including on the day of performace) †	33%
% non-discounted sales †	69%



Audience calculator:
Plan your audience targets by using [this simple calculator](#).



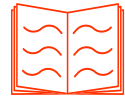
Target families or create a “child-free night out” positioning for parents to attend on their own.



Drama non-attenders were **twice as likely** to have children under 16 living at home (22% vs 10% of drama attenders).



Don't expect your new attenders to come back as often as your drama regulars: **find the sweet spot** to encourage them to return by looking at when most rebooking and reattendance happens.



Drama non-attenders engage in arts and culture less often than drama attenders: only a quarter attend four or more times a year and about one fifth attend less than once a year.



Drama non-attenders go to live music (including tribute acts) and panto more often than drama attenders. Drama attenders go to stand up comedy much more often than non-attenders.



Set a **time-based rebooking** target e.g. 20% book within 1 month of last attendance.



If you are going to invest in schools' resource packs, they need to be **tailored** to specific school needs. The effectiveness of the packs depends on their alignment with school curricula and the needs of teachers.

Customisable learning packs may better support educational engagement. Education packs are not usually a way to drive attendance so can rarely be used as a marketing tool.



Don't forget schools' matinees and consider **travel subsidies**. For more schools' marketing ideas, see our Theatre Trip Toolkit.



Schools are a key drama market but are not always easy to attract unless the play is being taught on the curriculum.



At Theatre Royal Wakefield, the team recognised that travel and transport was an issue for schools. Thanks to some one-off funding, they were able to offer to either fully cover or make a contribution towards coach travel. They have found that helping with transport for schools is more important than discounts in driving schools' attendance. Even free tickets don't always mean that the students will come.



The process of audience decision-making

Step 1

Audiences describe an **initial hook** which grabs attention. This is often driven by **familiarity**: a known writer or title (often adaptations or Shakespeare).

Very high-profile cast may grab initial attention rather than persuade to buy (other than for their fans).

Step 2

There is then a stage of **investigation and validation** which may be passive (waiting for a friend to recommend it) or active (reading the plot or reviews), dependent on predisposition to attend; success at this stage places them in our potential market.

Step 3

The rest of the decision can be seen as a **series of hurdles to overcome**:

- Do the time and date fit my availability?
- Does the price fit the value I am placing on the experience?
- Do I have someone to go with?
- Can I get there?
- Will the experience be something I would enjoy?
- What is the opportunity cost of me going to this instead of something else?
- What are the risks, especially of being bored, trapped or depressed?
- What can I gain from it as an experience? Does it meet my needs from it, whether to learn or to laugh?

Developing Message and Creative



Build trust in your venue through high quality relevant communications that aren't always about selling a show.



38% of drama non-attenders go to things because they love the venue, very similar to drama attenders. For some audiences, this loyalty extends to wanting to support the venue as part of their motivation to attend.



Invest in brand campaigns which promote your venue as a whole in order to ensure audiences know what you stand for.



Binet & Field's The Long and the Short of It (2013) suggests a split of 44% brand-building investment and 56% sales campaign investment for non-profit organisations.



Think about all the possible **familiar touchpoints** and avoid those which may alienate those less in-the-know, e.g. focusing on the creative team. Create a "string of connection" for your new audiences to follow.



New audiences need familiarity/ reassurance before attending, preferring something they know something about. Even if they would take a punt on a new TV show, theatre drama feels like a bigger risk – because of paying for tickets and potential to feel trapped.

"I'd rather go for something light-hearted and then it can be very hit and miss with comedy. I've kind of just leaned towards a few Shakespeare comedies, which I know I enjoy and have seen *Much Ado About Nothing* basically multiple times because I know I like it."
(Drama non-attender)



Points of familiarity checklist

This checklist runs through some of the ways in which you can effectively create an initial hook for new drama audiences, based on their motivations and preferences discovered through the research.



Don't spend too much time trying to convince your new audiences that the play is "relevant"; instead, focus on how it connects with things they know. This could be a theme, a writer, a story or a film. You may need to try out a range of different themes to work out what resonates with different audiences.



New drama audiences are unlikely to be influenced by being told something is relevant to their life or experience (only 13% said this would motivate them to attend), preferring more concrete familiarity such as known play titles or adaptations. This doesn't mean that a familiar title cannot be creatively adapted, of course!



Adaptations and classics (including Shakespeare) were helpful touchpoints and should be played up if available as selling points.



"**Try something new**" is likely to have less appeal to non-drama attenders than referencing familiarity and offering reassurances of quality e.g. from West End, reviews.



Non-attenders are driven by entertainment and a guaranteed good night out. "Direct from the West End" had strong persuasive appeal (45% drama non-attender vs 32% attenders said it would encourage them to book a play).



Ensure your key artwork and copy communicates the **themes** of the show and how your audience will **feel**: this is the critical information non-attenders want to know.




"But there is definitely something in a good poster, in the description, about giving out the kind of themes ...that it's gonna be funny or just telling me a bit about about what it's about and tell you what you're gonna feel." (Drama attender)



Avoid the words "play" and "drama" in favour of more descriptive terms, especially the type of play e.g. mystery, period drama.




Although these words were popular with drama attenders to mark out their familiar experience, they were far less persuasive for new drama audiences. 20% found "drama" appealing and 11% found "play" appealing (vs 43% and 34% respectively for drama attenders).



Talk about the benefits of attending in terms of wellbeing, escapism and entertainment, and show how it also applies to the drama show you are promoting.



Given that so many non-attenders are parents of under-16s, this focus on wellbeing and escapism could be linked to having a night off from their responsibilities.




Drama non-attenders said they found the experience of watching a musical very different from a play in terms of wellbeing, escapism and entertainment. They rarely expected to get these from a play. They also felt uplifted and felt better about themselves.

Drama attenders were also more likely to associate wellbeing benefits with musicals than plays.



In tandem with this, explain how the production will help them to see the world differently.



All audiences are more likely to think plays deliver on making them see the world differently or stop and take notice. This is something they feel they will get more from plays than from musicals.



Stage 2:

Implementing your campaign

In this section, you can find ideas drawn from our research with audiences and venues that will help you implement your campaigns effectively, throughout their lifecycle.

Generating Awareness

Ensuring audiences know about the show and it reaches and maintains top of mind.

Building consideration and Desire

Moving the show and venue into an audience member’s list of possible options eventually creating a desire to attend.

- Selling the show
- Selling the experience

Driving Action

Ensuring audiences convert to purchase.



Ideas



Insight



Case Study



Tool/Template

Generating Awareness



Casting of **soap opera** actors may be worth highlighting for a proportion of new audiences.



Link your marketing campaign to places where soaps tend to feature, for example TV guides and celebrity-driven websites/ social channels.



Drama non-attenders are twice as likely to watch soaps (22% vs 10% of drama attenders). Actors they have heard of from TV are considered an encouragement to book by 44% of non-attenders (the same proportion, in fact, as drama attenders).



Focus on **familiarity**, making links to similar things on social media and beyond.



If you want to invest in social media to reach new audiences, a much higher budget will be needed for prospecting. It will be harder to reach new audiences cost-effectively, especially at this early awareness-raising stage when frequency matters.



Only current drama audiences tend to see social media campaigns if you are optimising to conversion. Moreover, only 37% felt they would be encouraged to attend by seeing an ad on social media.



Create content tailored to new audiences that educates them from early in the campaign, forming a stronger foundation for later sales messaging.



Bookings may be later, but awareness may need building early for audiences who lack the number of touchpoints of a regular drama attender.



Invest in turning “musicals superfans” into drama **opinion leaders**:

- You could offer them a tailored, curated introduction to drama, starting with something familiar and explicitly inviting them to become a ‘drama guru’ by seeing more
- Or create a free membership where you get exclusive access to information and ticket releases if you introduce new people to drama, and offer it to frequent musicals attenders
- Also see ideas on ambassador schemes, below.



Although you might normally suppress frequent attenders from surveys, these regulars want to feed back. Consider a **tailored email for people who have been two or more times that year** with your post-visit survey, showing that you especially value their opinion.



Some people self-identify as theatre opinion leaders even if they have not attended much/ any drama, and this self-identification means they are potential drama opinion leaders, too.



Encouraging **post-show discussions** and **social media engagement** helps maintain interest and build a community around the theatre.



Ensure **word-of-mouth** content is from people who are like the new audiences you want to attract, whether that's social influencers or other audience members.



Use **community ambassadors** or events to connect with new audiences (see case studies on next pages).



Word of mouth and recommendation is influential for three-quarters of new audiences (bigger than any type of content or review): again, it is a trustworthy touchpoint of familiarity which reduces the risk of trying something new.



Positive word-of-mouth and social media feedback were highlighted as significant factors in audience retention and growth by Curve and Queen’s Theatre Hornchurch.



For the visiting production of My Beautiful Laundrette, Lowry built on work they delivered for the previous National Theatre touring show and hosted a free performance for community groups.

They invited local Salford community groups, people from younger South Asian community groups and groups from the Black community who came to a previous event. They aimed to get 250 people along, offering pre-show refreshments (finger food and soft drinks) and short welcome speeches from Lowry and National Theatre.

Lowry worked with two freelance audience development ambassadors to deliver this work, both of whom were well-connected in their own communities. Both are paid a small monthly retainer by Lowry and then commissioned for more extensive work when project or show budgets allow.

As the event took place during Ramadan, Lowry – in consultation with the ambassadors – arranged for dates to be served on arrival for those breaking their fast; they also set up a prayer room for guests.

450 people attended the performance as part of this activity, and 250 had a more extensive engagement through additional activities.

Lowry also uses unique codes and ticket subsidies where possible when working with ambassadors to make activity easier to track.



Wolverhampton Grand Theatre set up the South Asian Ambassadors before the pandemic using a local Audience Development Consultant. The Consultant helped to recruit the other ambassadors and they advised on policy, staffing, programming, considerations around patrons who have English as a second language and how the theatre can be more welcoming to this group.

The Consultant was paid, but the rest of the ambassadors volunteer their time (although cakes at meetings are essential!).

They helped the Grand grow audience numbers from a South Asian background and numbers have risen steadily since. It is important to note that this did not provide an overnight fix, but it is felt to be a very worthwhile area of engagement. Recent panto figures back up this audience development.

Engagement also includes social media messaging on important religious festivals: wishing a happy Eid and Diwali as well as a Merry Christmas, for example.

The success of the South Asian Ambassadors led to the development of a Black African and Caribbean group. Again, an Audience Development Consultant was appointed; she helped recruit Ambassadors from different backgrounds. Monthly meetings have led to discussions shaping programming, the creation of a documentary about Windrush and reaching people who had not visited before.



When My Beautiful Laundrette visited Queen's Theatre Hornchurch, they held an ambassador event discussing the upcoming show with groups they were building new relationships with. There were 18 attendees, who all showed recognition of the film (useful insight for other marketing) and interest in sharing the show with their groups. Free tickets were offered for opening night, with five groups taking these up.



Curve recruited a range of community ambassadors after the pandemic. They each have different expertise, including a BSL interpreter, a writer and someone working for a community charity. They are all engaged with different groups of under-represented audiences and the scheme is tailored depending on the neighbourhood areas they are from. They give them their own tracking promo code. Results vary from upwards of 60 tickets per ambassadors to smaller numbers, and free tickets do tend to have greater take up than discounted tickets.



For the National Theatre tour of Suckerpunch in 2023, Sunderland Culture picked two themes of most relevance to Sunderland audiences: Music and Boxing.

They engaged a local global majority singer/spoken word artist with a wide social media presence to undertake some social influencing via his Instagram account.

They then mounted a pre-show Q&A session between local sports journalist Graeme Anderson and Sunderland boxing legend Billy Hardy. Approximately 50 people attended the pre-show Q&A.



In 2024, Sunderland Empire launched a Young Influencers scheme, inviting hand-picked individuals aged 14 to 18 with local influence or a social media presence to a show. Extra experiences are wrapped around the show, such as Q&As or a backstage tour, with a view to developing peer-to-peer marketing.

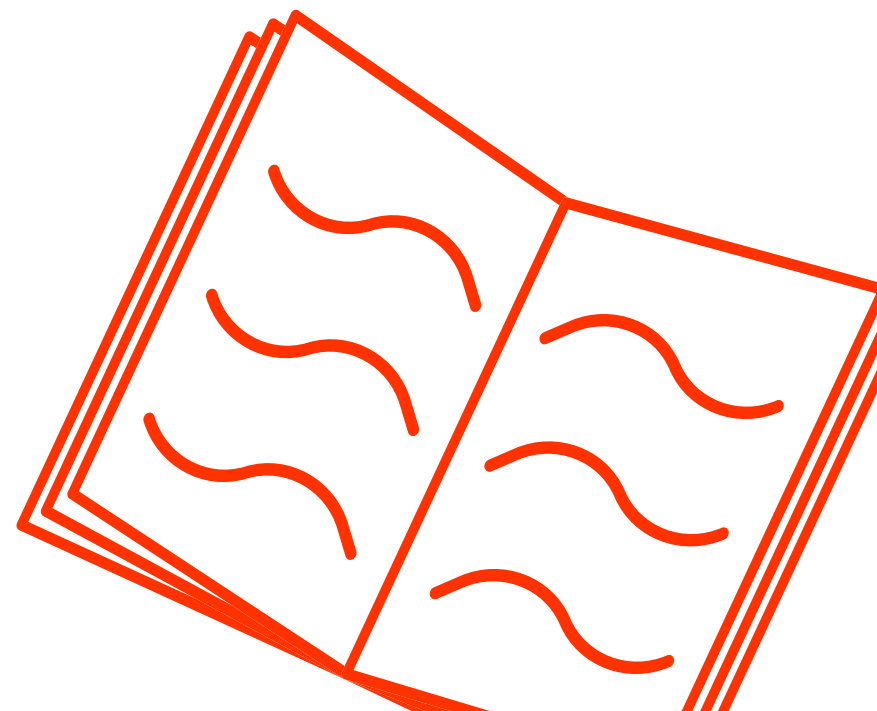
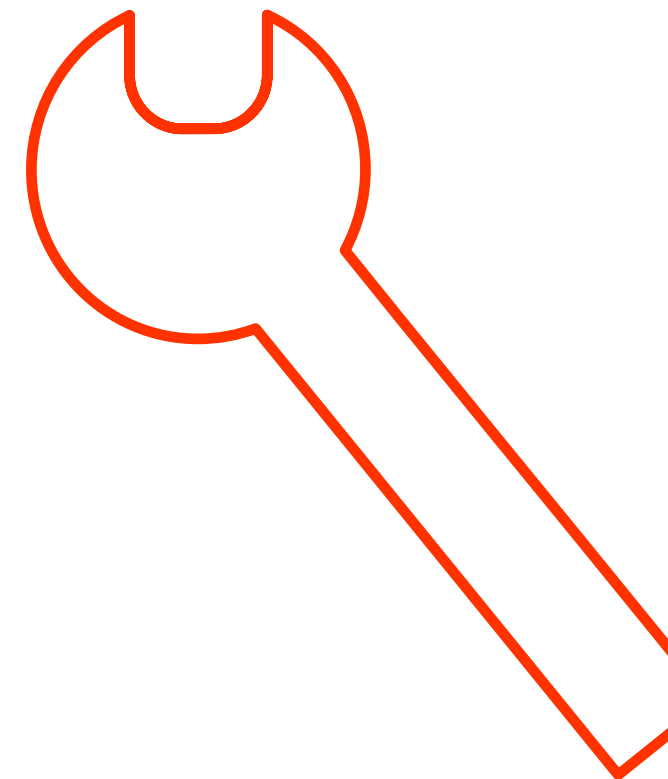


Funded as a pilot by Theatre Nation Partnerships, Cast Doncaster recruited three Community Ambassadors representing diverse communities across the borough.

Over six months, they supported new audiences to attend drama, dance, family, music and circus shows at Cast.

In total, they completed 14 visits with 357 participant engagements. They collected valuable evaluation insight and removed barriers to access such as providing food and drink, and ensuring prayer and breakout spaces during visits.

They have been an invaluable resource for the theatre and will continue in their roles following the pilot, alongside an embedded researcher from Sheffield Hallam University who will be evaluating the scheme.



Building Consideration and Desire: Selling The Show



Confront concerns about **boredom**. You could do this head-on: "Think plays are boring? We guarantee you'll like this one!"



New audiences are risk averse and have multiple anxieties: they might not like it because they don't know it (38%), and they worry they might be bored (26%).



Ensure the **type of drama** is referenced, especially if one of the most popular types is funny, mystery, true-life, psychological thriller.



Use **language** such as psychological thriller, murder mystery etc (common in TV, film and books) to help give new audiences a reference point.



Language is key so do some A/B testing in campaigns to explore which language resonates with audiences most.



The type of drama influenced new audiences more than anything else other than the subject matter itself: 91% said the type of drama influenced them attending. Words like "hilarious tale" and "true-life drama" were far more appealing than just "drama" or "play".



Do all you can to get footage of the **show actually being performed**: focus on elements that will give people a true taster of what it's like.



Seeing the play actually being performed in a video clip was a powerful motivator for newer audiences (60% said it would encourage them to book).

Building Consideration and Desire: Selling The Experience



Reference the **entertainment value** of the experience, that it's a great night out, that you'll have a good time. Selling the experience also helps to build venue brand and trust which is a strong foundation for longer-term audience development.



Entertainment is still key, with 75% of non-attenders finding the word "entertaining" appealing in the context of a play vs 43% of regular drama attenders.



Highlight the **benefits of the live experience**, not just the particular production (this could also drive a more brand-led campaign): quotes like "you just feel more", "extra energy", "emotional connection" or the mindfulness ideas of "no distractions" and "full focus" can help new audiences understand how they will feel.



Potential audiences for drama identify genuine benefits of seeing live performance compared to film or TV.

- "You just feel more... when you see them live, having that audience, there's an extra energy. [Comparing live and TV stand-up] I don't think I've ever laughed so hard... There's just more of an emotional connection." (Drama attender)
- "It's the difference between going to a concert or listening to Spotify...the atmosphere. Everyone is laughing together and maybe just a few seats away, there's a drunk lady vibing with you." (Drama non-attender)



Describe how attending is an **opportunity to escape** from everyday life or look after your own mental and physical wellbeing.



Over half of potential drama audiences would be encouraged to book by benefits of improved wellbeing or a chance to escape.



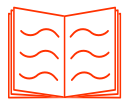
Create campaigns that can be used across a range of types of show which focus on the benefits, for example, **Escape to the Theatre**.



Offer **occasion packages** around the event, for example drinks, meal, programme bundles, and encourage people to get dressed up.



Run a **special occasion** campaign, using any kind of calendar occasion and showing how this experience will meet that need.



31% of drama non-attenders are driven to attend theatre by special occasions. Indigo's *Tomorrow's Audience* sector-wide research also found that special occasions were one of the key motivators for first-time attendance.



Reassure audiences they will have a **great night out** by focusing on the benefits beyond the show: socialising with friends, feeling uplifted, relaxing. Be honest about the emotions they will feel at that particular show.



Many new audiences are put off by serious or sad themes and worry it means they will get bored. With musicals, they are more confident that, even if it's not to their taste, they will still have a good night out.



Create video content (for example vox pops) that communicates a **great night out**. Focus on people having a great time, and – when a play might be perceived as too serious – **debunk any myths** or preconceptions about the experience: for example, interview audiences about what they expected and what they experienced (e.g. "It was funnier than I expected".)



Use video content and other marketing assets to **communicate the emotion** of the experience, not just the story or other factual information. This could be audience vox pops, review quotes or email copy.



Focus copy and imagery on the **social experience** and consider special offers which highlight it, for example group offers.



53% of drama non-attenders are driven to go to the theatre to spend time with friends and family. (Other Indigo research, including *Tomorrow's Audience*, has repeatedly found that social connection is a more significant driver for new audiences than for regulars.)



Ensure your website and pre-visit emails, as well as any marketing targeted at new audiences, have details of the length of each part, as well as details of any intervals and their length, so audiences **know what to expect**.



Consider **highly targeted money-back guarantees** for new audiences if they do not enjoy it and decide to leave at the interval. This reduces the perceived risk to them and may encourage reluctant attenders to give it a go.



Drama non-attenders repeatedly talked about worries of being bored or trapped at something unenjoyable.



Use **social proof** to promote classic shows: "1 million people can't be wrong!"



If you have a range of classic titles coming up, consider creating a **"collect-'em-all" stamp card** to encourage people to see those shows they've always heard of and talk about as things they "should see".



Reasons audience gave for the appeal of particular productions included: familiarity (a very high-profile writer, a classic or an adaptation), sub-genre itself, opportunity for a social outing, strong reputation or legacy (e.g. long-running, performed in the West End).



Use more **familiar mediums** to expose people to theatre drama, for example referencing similarities to films, books or TV programmes.



New audiences are often more familiar with the TV and cinema experience, so use these to drive them to try out live drama.



The Regent Theatre in Stoke-on-Trent specifically invited non-drama attenders who were regular musicals bookers to a screening of a filmed drama production which was an adaptation of a relatively well-known book with broad appeal. They then offered those attenders £15 tickets to attend a drama production with some similar elements, including puppetry and family appeal. The offer was well-received and had a 13% conversion rate.



Wolverhampton Grand Theatre has run free screenings in collaboration with and hosted by their local library, offering discounted tickets live shows at the Grand to those who attended the screenings. This strategy has done well to convert audiences to drama.

The National Theatre Collection of filmed theatre productions is partially free for UK libraries to screen.



Ocean at the End of the Lane toured to Lowry. The team found that the writer Neil Gaiman wasn't widely known, so there was a need to build familiarity. They invested heavily in outdoor advertising; once the show opened, audiences referred to the fact they had seen the show advertised around and about.

This above-the-line advertising spend was followed by heavy social media usage. There was a Stranger Things/Doctor Who vibe to the show which helped create points of reference and familiarisation, especially around the type of show and what audiences might expect. The sci-fi and horror elements were tapped into by getting involved with marketing at a horror film fest and at Comic Con.



Target captioned drama performances at new audiences, not only those who are D/deaf, deafened or hard of hearing.



Potential attenders are used to watching TV and consuming social media with captions. (Indigo's *Tomorrow's Audience* research found a third of younger audiences were keen on theatre captions.)



A/B testing messaging and promotional ideas, as well as trying different approaches and channels, is vital to learn more about audiences.



Tailor messages and imagery to your target audiences, including in digital advertising, social media engagement and partnerships with local organisations.



There is not one type of drama non-attender. Motivations to attend live performance vary (and can be similar to drama attenders, as shown on page 9).



For My Beautiful Laundrette, Queen's Theatre Hornchurch created specific marketing materials for different audience segments, including LGBTQ+ and British South Asian communities.

Driving Action



The more **touchpoints** you can create, the more you should be able to charge. At the least, don't assume there is price sensitivity and simply discount tickets that aren't selling: instead, think about how you can create more reference points to justify the current price.



Price awareness and sensitivity are highest when other motivators are lowest. This means, when people have fewer touchpoints (and therefore lower desire to attend), they tend to look at price more in their decision-making.



Given that new drama audiences tend to book later, last-minute discounting may not always be necessary to drive sales – especially where other touchpoints and interest have been created. Also, as new audiences have fewer reference points for pricing, they can quickly become accustomed to the lower price point, making it harder to increase yield in the future. Where possible, consider holding prices and **limiting late discounts**, perhaps in favour of more structured pricing communications or low- price deals, as below.



Target **discounts and offers** at new audiences only, and make your standard discounts visible and easy-to-understand to those who might be less familiar with them.



Use **familiar pricing mechanisms** that are seen in other sectors to increase the reassurance factor, such as Buy One Get One Free or loyalty cards.



Create a new **permanent discount** for first-time drama attenders to help introduce them to drama.



New audiences are likely to have a lower income – almost a third say they have lower or significantly lower than average income – and therefore smaller budget for attending things that aren't their normal preference.



Leverage **subscription-style approaches** (Sam Freeman has written a [great blog](#) on this), perhaps specifying that one show needs to be from a fixed list (your dramas) or offering previous non-drama attenders the chance to add-on a drama for a small incremental cost.

For example, you could offer a **multi-buy or subscription** on musicals in a season, then offer the chance to add a drama for £10.



Drama non-attenders may still be high-frequency live performance attenders: over 50% attend live performances over 4 times a year (just not drama!).



Queen’s Theatre Hornchurch’s *‘Jump the Q’* scheme offers a discount when booking three shows within a season. Audiences can buy their season ticket then choose dates and seats for each show when they are ready. The scheme is flexible and doesn’t only promote drama, with a musical occasionally included in the three. However, the Autumn 2024 season ticket was for three varied plays (*Bedroom Farce*, *The Turn of the Screw* and *Handbagged*), encouraging multiple drama attendance rather than simply discounting one show.



Use **price sliders or filters** on your website to help new audiences find the cheapest last-minute seats – and tell them that’s what you’re doing.



Low price can be particularly influential for last-minute booking, encouraging conversion.



Employ pricing and promotions specifically aimed at **reducing the risk of attending** (money back guarantees, Pay What You Can, exchange for credit if you can’t attend, etc.).



New audiences are risk averse and have multiple anxieties: they might not like it because they don’t know it (38%), they might be bored (26%). They are less willing to spend money on something that might not meet expectations.



Actively promote last-minute deals on **stranded single seats**, encouraging solo attendance and making it a positive selling-point rather than a negative.



Some potential attenders (14%) struggle to find someone to go with them and this puts them off booking for a play. Although they may attend cinema on their own, they may not see theatre as something acceptable to attend alone:

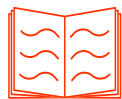
- “It feels like theatre is something I have to do with other people. So if I can’t find someone willing to go with me... then I just won’t go...I can go to the cinema by myself. I guess that feels a bit different because there’s no interval. There you go in and leave... For theatre it feels like it has to be a social event for me.” (Drama non-attender)



Sunderland Empire have a *Matinee Mingle* scheme, where the venue hosts pre-show drinks at mid-week matinees specifically for older (retired) single people. This is a great way to reassure solo attendees and positively encourage them to attend alone.



Offer **group discounts** for friends and families and target them at new audiences. Attending for a social outing may reduce the risk of attending as there is a guaranteed benefit of attending outside the show itself.



53% of drama non-attenders have attended shows to spend time with friends and family.



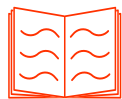
Use a **sense of urgency and FOMO** (this is your only chance to see this classic hit in your area) to drive conversion.



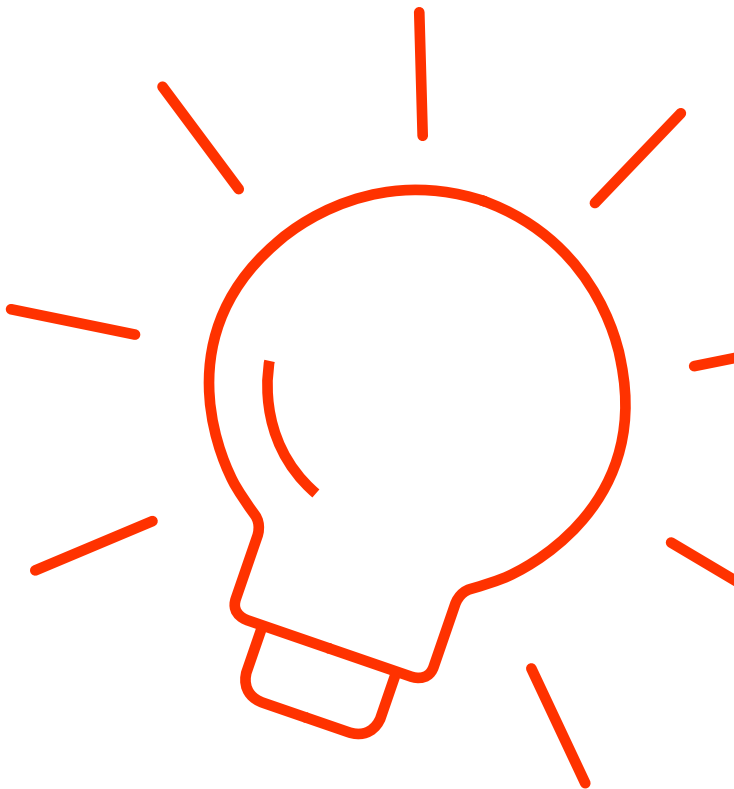
New audiences are persuaded by something that has been tried and tested e.g. West End shows, long-running shows or classic titles.



Create **partnerships with transport providers** (if available), offer free parking when attending a play, or offer a discount at the counter if you come by bus to increase value for money while also improving your sustainability.



About a third of audiences were interested in reduced travel costs as an encouragement to book.



Stage 3:

Increasing Understanding

Every connection with audiences is a chance to increase your knowledge of them: who they are, what they do, their attitudes, preferences and motivations and the impact you have on them.

The research report that informed this toolkit may provide a useful source of questions to ask your audiences, or information to compare your own audience data against.

In this section, you can find a handful of suggestions to help you understand audiences better.

Quantitative data

Gathering the numbers that give you insight into audiences

Qualitative data

Finding out the “why?” of your audiences



Ideas



Insight



Case Study



Tool/Template

Quantitative Data (how many, when, who, where)



Compare your box office data to the benchmarks in this toolkit and the research report to help you understand any differences in your own audience.



Ensure you have a post-visit survey set up. Depending on your ticketing system, you could automate sending this after every show. Consider what you want to find out about audiences, not just what you need to report to funders.



Incentivise your surveys to increase response rates. Rather than offering free tickets or refreshments, which may bias responses or not be as relevant for infrequent attenders, choose a prize draw which may appeal to all demographics.



Consider setting up a post-booking survey to be sent immediately after someone has booked tickets. This can capture motivations for booking more accurately than a post-visit survey, which can sometimes be sent months later. You could also capture demographics information at this point.



Worksheet: Benchmark your success

This worksheet allows you to evaluate your results against the benchmarks developed through the Theatre Nation Partnerships drama research project. Add your results, then reflect on any future actions.



Collaborative data tracking

Significant learnings are available by comparing results. After any piece of drama programming, we recommend recording your data in this template. You can then choose to collaborate and share this with other venues, for example when programming the same touring show.

Qualitative Data (how, why)



Use your ambassadors to gather anecdotal insight on new audiences. Create a template for them to record ad hoc information from events or conversation so you can analyse it.

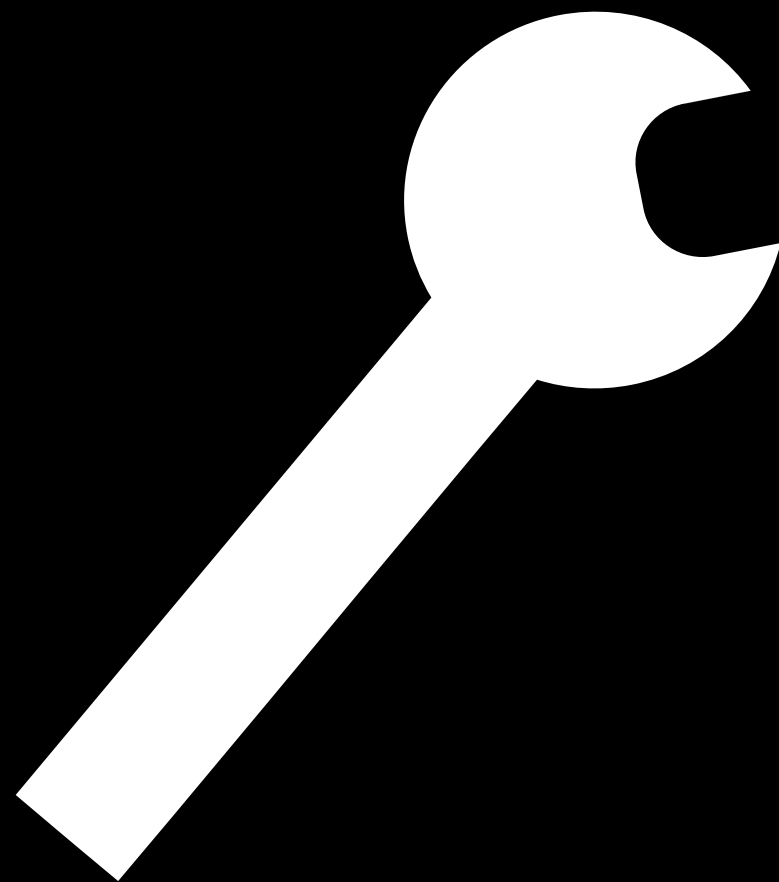


Consider holding informal post-show forums or conversations with your audiences, perhaps in the bar after a show in exchange for a free drink.



You will need to try a lot of different tactics to find out what works for each of your audience groups. Choose which parts of the research to try out and monitor success against the findings in the broader research.

Press For Assistance!



Are you stuck? Struggling with your marketing campaign? Need some new inspiration?

These checklists bring together a summary of some of the key findings from the research and give you a list of the most important points to consider in your campaigns. Go through the checklists then dive deeper into the detail in this toolkit or the research.



Checklist Your Hooks

Check how you are trying to attract attention and initial interest.



Campaign Checklist

Top tips to ensure your campaign is hitting the right notes.

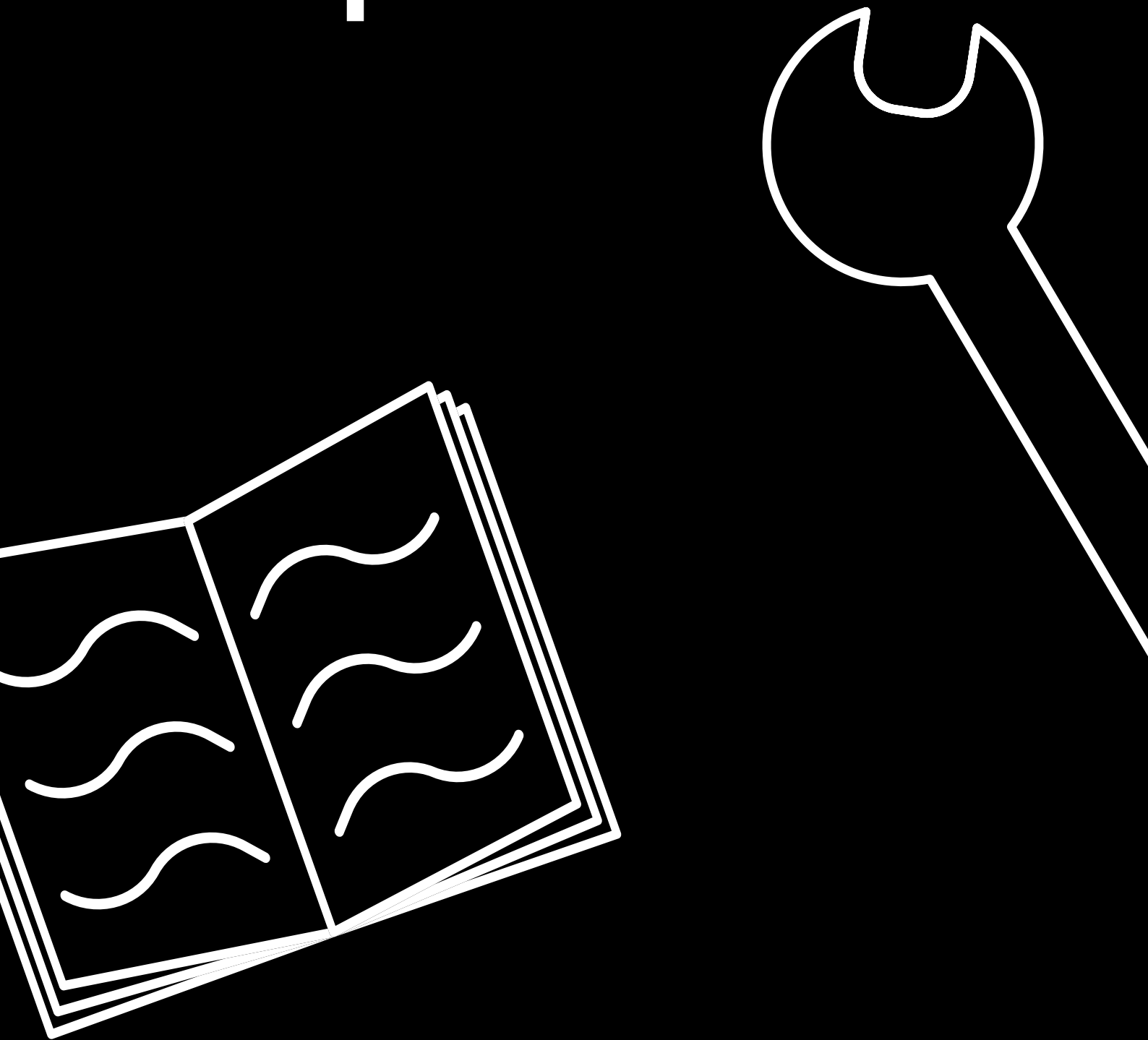


“Make It Easy” Checklist

Have you removed as many hurdles as possible to help people book?

Or just dive into the audience insight report to find inspiration.

Catalogue of Tools and Templates



Audiences calculator



Points of familiarity checklist



Drama results template



Worksheet: Benchmark your success



Checklist Your Hooks



CAMPAIGN CHECKLIST



“MAKE IT EASY” CHECKLIST



Understanding Drama Audiences Research report

