



Drama Audiences: Insights from Theatre Nation Partnerships Research

With the National Theatre and Curve

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Kerry Radden, Indigo Ltd:

Well, thank you so much, everybody, for joining us today. I'm Kerry Radden, I'm Associate Director at Indigo, and thanks for coming along today as we plan to share some of the research that Indigo led into drama audiences, which was for the Theatre Nation Partnerships. We're going to talk a bit about that in a moment. And this research underpins the Developing Drama Audiences Toolkit, which we're going to be sharing as well.

We're not going to spend loads of time actually looking at the toolkit itself today, we're more looking at the research behind it, but we'll share links in the chat shortly to both of these reports, which are freely available for everybody to look at.

We're also going to be sharing how the toolkit has been used in practice, and I'm joined today by Kiri Grant, who's Head of National Partnerships at the National Theatre, and Claire Ward, Executive Director at Curve. And in a moment, Kiri's going to give a short introduction to the Theatre Nation Partnerships, and then Claire's going to frame the problem that we were facing before this project began.

But just before we do that, a little bit of housekeeping. So, we've set this session up as a meeting format, as you can see, but I'm just asking that we stick to some house rules. There's quite a lot of people here, so if you could put all your questions in the chat, rather than trying to put hands up, otherwise I think we'll get out of control very quickly, and that'll just make sure that we can answer as many as possible, which we're planning to do at the end of the presentation. And likewise, if you've got any technical issues, just like I experienced myself, that you

need to flag to us, please do put those in the chat as well. My colleague Helen is monitoring the chat for us, and she'll try and put as many questions as possible to our panellists at the end, and we welcome all your questions. But as well as Claire and Kiri, there may well be others here from the TNP network today, so we may spot you and throw out questions to you, if that's okay, so stand by.

Just to flag that today we're very much focusing on this piece of research and the toolkit that came out of it. We're not going to be talking very much about the Theatre Nation Partnerships itself, or any future national partnership plans. So, that's not something that we're going to cover today.

So, first of all, just a very quick introduction to Indigo, if you haven't come across us before. We're an audience intelligence and strategy agency, and we're really passionate about equipping the sector to put audience insight at the heart of making decisions. We work exclusively in arts and culture, and we work with a whole range of organisations and sector bodies, and we've absolutely loved working on this project with a whole big group of organisations.

So today, we're going to share highlights from this research into drama audiences. It was commissioned by the Theatre Nation Partnerships group of organisations, which is led and supported by the National Theatre, with significant leadership on this project from Curve, which is why both Claire and Kiri are obviously here today. So we'll introduce you to the toolkit briefly at the end, but they're both available on our website and on the National's website. Helen's just going to pop the links into the chat, too, so that you can look at those. There's also a QR code at the end of the presentation, or good old Google. You'll find them very easily. So, without further ado, to kick us off, I'm going to hand over to Kiri to give us some context. Over to you.

Kiri Grant, National Theatre:

Thank you, Kerry. Lovely to be here today, so thank you for having me. As Kerry mentioned, I'm Kiri, and I'm Head of National Partnerships and a huge part of that role was our Theatre Nation Partnerships programme.

And the Theatre Nation Partnerships programme was a collective programme which built an engagement in theatre, and strengthened relationships with local audiences, schools, and communities.

And this programme ran from 2017 to 2025, so we finished it last year with a big bang, and mainly it's convened by the National Theatre, but was really important, as I said, that this is a collaborative programme with our 13 partners, across the country.

And I'll just give you a kind of idea of who our partners were. So we had CAST in Doncaster, we had Lowry in Salford, Greater Manchester, Curve, Leicester with Claire, North Devon, so we had Landmark Theatres, and we had Queen's Theatre Hall Church, out at East London, South Essex, Peterborough another Landmark Theatre, Stoke-on-Trent, and Restoke and Regents Hall, who are both based there. We worked in Sunderland, with Sunderland Empire and Sunderland Culture, Trowbridge Town Hall, Wakefield, Theatre Royal Wakefield, and Wolverhampton with Wolverhampton Grand.

And that was a really great collective of commercial, non-commercial, producing houses, non-producing houses, and a really great set of groups for us to think about how we could work closely with our communities, schools, and like I said, audiences.

Part of that was us to look at, okay, drama, and how do we rebuild those drama audiences from COVID? And this is where we started looking at mid-scale, and thinking about how we could tour, amongst the partners, a mid-scale, drama for Pacific Peace. So we did 3 of those. In our first year, we did Soccer Punch, by Roy Williams. We did My Beautiful Laundrette, which was a remount, which was produced by Curve, Leicester, and our last year, we did Handbagged by Maura Buffini. So, a really great collective there of theatre and drama for us to take around the country. And part of that, we also had working groups. So, it was a time also for that peer-to-peer shared learning, and one of those groups was looking at audience and marketing, particularly.

And again, as I said, with that focus on how do we bring audiences back into the theatre to get really excited about drama. So, from that, we've had quite a legacy of work, and this being one of those brilliant legacies, creating that drama toolkit and research to think about how we can engage with audiences and what we have learned from that.

Kerry Radden, Indigo Ltd:

Fantastic. Thanks, Kiri. So, Claire, do you want to take over and just tell us a little bit about how this project came about?

Claire Ward, Curve Theatre:

Yeah, hi everyone. So, as Kiri just mentioned, as well as the marketing and audience development subgroup, there was also a measures for success subgroup, which, I fortunately became chair of, and that, don't laugh, Kiri.

And, we were awarded, as part of the funding received for Theatre Nation's Partnerships, we were awarded a research grant, which was really vital to shaping a key element of the International Nation Partnership, and therefore we had a big group discussion with regards to really trying to find something that would benefit all the partners collectively, but also stand out.

Within the industry, and make a real impact. And tying in with the mid-scale tours of the three titles which Kiri just mentioned, we really felt that this was a real opportunity to look at drama, and look at drama audiences. And, but what was really key for us was not just having a wonderful piece of research, but actually something practical that venues, organisations across the sector can use on a day-to-day basis.

And which is why the toolkit is such an important part of this whole process, and commissioning that from the start, as... alongside the research, was vital to the success, and, Indigo took that challenge on. Very positively. So we...I think the challenge... I think drama can sometimes have a bad reputation across the industry, in terms of sales and financial targets, and I think that predates pandemic as well. You know, I've been around for more years than I wish to admit to, but I, you know, drama sales has always been, for some titles, a bit of a challenge in comparison to what we were looking at with musical theatre audiences. So, I think when we really started to sort of unpick the challenge and the problem and the question that we wanted to answer, it actually came really easily and really naturally to the measures for success group, and I think we all got really excited about it, and I'm delighted that we're going to share the research findings today.

I'm hoping that some of you will look at this really positively, and actually, it will reframe your thinking in terms of where the opportunities are, and then how to usefully use the toolkit to aid dDepartments across your organisation, so I'll hand you back to Kerry.

Kerry Radden, Indigo Ltd:

Thanks, Claire. So, we'll start to dig into the results, but it's worth saying that because, as Claire outlined then, it's a universal problem, and a universal question for people, so it wasn't only the organisations that Kiri just went through who were part of the TNP group who took part, we actually reached out beyond that as well. So, over 22 organisations ended up contributing to the research, so a big thank you to all of those who've shared either their sales data, or sent out surveys, or contributed their own thoughts, experience, etc. So I think that's a really helpful

picture, across the country of how people are feeling, both audiences and organisations.

So, with this research, as Claire said, we wanted to answer some key questions. We wanted to understand, first of all, audience behaviour in relation to drama, so test the facts, test our assumptions, and see what was really going on. We wanted to dig a little bit deeper into attitudes and motivations around drama programme, including the barriers that prevented audiences from coming. So, we know there were audiences who were coming to musical theatre, as Claire said, so maybe they could shed a bit of light for us on any resistance in coming to drama, so we used those almost as a bit of a kind of control group comparison. And then finally, we wanted to look at some of our preconceptions about what drama meant to people, including thinking about exploring it in other contexts, particularly TV. Maybe there were things that we could learn from if we looked at kind of adjacent areas.

So, to try and answer this, we tried to approach the problem from different angles. So, first of all, we looked at actual sales data, so we weren't just relying on audience opinion, or our own, kind of, perceptions to recall, you know, what was happening. We also focused at the time on the tour of *My Beautiful Laundrette*, and did a kind of case study of that in process. We then sent a big survey to audiences from a sample of those TNP venues, and also to the Indigo Audience Panel, which is a group of about 17,000 arts-engaged people who've proactively signed up to take part in audience research there across the UK. And then we also took part... we also ran, sorry, a handful of focus groups to kind of dig a little bit deeper again, and try and colour in some of the outlines.

So we obviously went into it with some assumptions. Like the venues that we're working with, most of the Indigo team have also worked in venues for a long time, so when we all talked together, we did have some kind of common hypotheses which emerged, as you can imagine, and some of these were things like what I've called the star casting hypothesis, so the only way you're going to get people to drama is with star casting. Then we had what I've called the disengaged hypothesis, so people who don't come to drama tend to be people who just don't really go to theatre that much. That was one of the assumptions people had.

There was also this kind of decline hypothesis that drama audiences were sort of falling off a cliff while musicals were thriving, especially post-pandemic. And then there's the distinctiveness hypothesis, that there was kind of such a thing as drama audiences, and we spent a lot of time at the beginning talking about this thing called drama audiences, and that they were very distinct and different from people who don't come to drama, and that really underlined the whole project and how we talked about it at the beginning.

So, what did we actually find? So, first of all, we started by looking at sales data, and we had sales data from 11 of our venues from across the five... the last five years. And the first thing that struck us was actually the sales pitch wasn't quite as obvious as we'd assumed. So these figures are based on data from those 11 venues from 2019 onwards, and they show, positively, good post-COVID recovery for both musicals and dramas. Musicals are tracking ahead, with the red line, drama and the blue line. This is based on capacity achieved to try and flatten out differences in pricing and size of auditorium. Of course, there's lots of other confounding factors in terms of things like length of run and whether things like that have changed, but it's interesting to see that it's not quite as dramatically different a picture as we might have assumed. The big difference, or the big thing we noticed about drama is there was a lot more variance in drama than in musicals.

So that might really explain why we sometimes feel drama's a bigger risk. It feels less predictable. We also saw this kind of variance within the ticket price as well. So overall, musical theatre was commanding a much higher ticket price than drama, so the average on these charts, the little crosses in the middle of the yellow boxes are the average price paid across all of the musicals and dramas that we looked at across those 11 venues, but you can see with drama that that yellow box, the kind of where the bulk of the pricing fell, was much, much lower than musicals. The interesting thing is also the spread. So at the top of those drama lines, there's a few dots, and those are the kind of outliers where they could command a higher price, and those outliers tended to be big West End hits, or famous kind of comedies, as well as some film and book adaptations.

So, a lot more variance and more predictability... unpredictability and drama. However, we started to look at audiences through the survey, and we started by going into it again with this idea that it's kind of drama attenders and non-drama attenders, and we compared drama and musicals, again, to give us something that's sort of a most adjacent experience, even though we knew there were kind of differences in outcomes. And again, this started to debunk even more of those myths, because there didn't seem to be such a thing as a drama audience, which is what we often talk about.

Almost everyone who responded to the survey went to both types of work at some point. And interestingly, many of them were much more fluid in the language that they used than we are when we talk to or about audiences, so they use words like play or drama just as much to describe an opera or a musical as what we might think of as drama, traditionally. So it's really easy to fall into this trap of talking about drama audiences when actually they're much more complex than this. There's far more nuance in how we should kind of speak to people. Having said that, for our purposes, we kind of wanted to highlight the differences. So we focused on the sort of two edge cases. So the quarter of people who either only attended drama, not musicals, so they're the kind of indigo-y colour, or who

rarely or never attended drama at all. So that's our non-attenders, as we've called them in red, they might occasionally come but only very occasionally. And we've used those two colours for those who like colour coding all the way through to distinguish our drama attenders and our non-attenders. But please keep in mind that there are three-quarters of people somewhere in the middle, but what we're hoping is we can sort of learn from the extremes to inform what we do for all audiences in terms of increasing overall drama attendance.

So, having said that, who attends drama? Are there any differences? We presume there were very, very different people, we know loads of them overlap in the middle, but if we look at those edges, of course there are differences in their profile, and probably none of this will surprise you. So, drama audiences tended to be older than those who didn't attend drama. They were less likely to be from the global majority, they were less likely to have children at home. They had a higher income and interestingly they were less likely to be disabled.

So not too many huge surprises. And again, when we looked at how often they attended arts and culture, drama attenders were much more arts engaged in comparison to drama non-attenders. So well over half of drama attenders were engaging in some sort of arts and culture at least four times a year, compared to a quarter of drama non-attenders. And their interests in what they went to see seemed to vary as well. So, drama attenders, as a reminder, that's the indigo colour, seemed to be much more likely to say that they attended stand-up comedy regularly compared to non-attenders, which was quite interesting, whereas non-attenders were much more likely to say that they attended panto, or they attended music gigs or tribute acts. So there were definitely some differences there.

However, it's one of those things where, actually, there's a lot more in common, as well, between these two groups of people. It wasn't that they were necessarily completely distinct groups. So the preferences and motivators were not as different as we might have expected. So again, on here, the reddish colour markers are our drama non-attenders, and the bluish ones are the drama attenders. So we asked audiences what they preferred, or would prefer, if they were watching a play in the theatre. So our non-attenders on that top line were slightly more likely to edge towards the lighter entertainment, but not massively. They were also less likely to take risks, and would rather see something they'd heard of or read about before, but again, the difference in that middle line is not enormous. And then, on the bottom line, interestingly, this really challenged one of those assumptions. Both of the groups seemed to prefer the idea of quality actors, rather than being overly worried about seeing actors they already knew. Now, we can't deny star casting can help to sell but it's interesting that audience perception of that, they don't see it as a necessity, even when they're talking about attending a play.

We also started to look at motivations and attitudes using the survey, but also the focus group data. And drama attenders and non-attenders also had a lot in common here. We found that there were particular types of attenders that crossed over, whether it was going to see drama or not. So these are just a few of those that we found. So, the first one we called the theatre fan. So the kind of things that they would say were things like, you know, I'm known in the office as the person to go to if you want to know what to go and see, everyone thinks I'm the theatre guru, that was somebody who was seeing both musicals and drama. Then there was the happy soloist, and again, these could be seeing... could be drama attenders or not, so quite a lot of the time, I just fancy it and I'll go and see it on my own, and that's fine. They're not compromising about having to, you know, get other people along, which we often assume can be a big barrier for everybody, but clearly not for all.

And then the last one was our arts experimentalists who are open to trying new things, even things they themselves consider quite out there. So, it just told us that we need to be quite nuanced in our approach and avoid assumptions, and in some cases, actually, a similar programming and marketing approach might actually work for both current drama attenders and future drama attenders, sometimes.

Then, we wanted to understand a bit more about, kind of, broad attitudes to drama, and to get some new ideas, really, so we explored some comparisons with TV drama to see if there were any differences. So, again, some of these little blobs on a line charts, so we asked them whether they preferred, initially, drama on TV or in the theatre, and it's no surprise, really, that people who weren't our drama attenders were much more likely to say that they would prefer to watch drama on TV. So that already told us that actually they're engaging in watching TV drama, so is there anything that we can learn about how we present drama in the theatre to make it more appealing?

The drama non-attenders still preferred something lighter, even if it was on TV, which is interesting, but they are more likely to take a risk on TV than on a play, which makes sense when you consider the cost, the ease of changing your mind if you don't like that TV programme that you've started. But they are engaging in this sort of world, storytelling world. And interestingly, everybody agreed on the value of live performance, whether they attended drama or not. So people talked about... I love this quote at the top of, you just feel more, it feels like a brilliant marketing strapline, but people talked about the extra energy and the emotional connection, the sense of immersion, you know, forgetting other distractions.

Indigo Ltd: Everyone sensed that there was something really special about the live experience. And I wonder if we, as a sector, lean into this enough when we communicate. Do we spend too long focusing on the content, and not enough on the experience to help those people who might see drama as a barrier remember that they really, really value that live experience?

We also know that drama non-attenders were much, much more worried about being bored by coming to see something, coming to see a drama, and much more worried about it feeling depressing, so they really had a sense when they heard the words play or drama, often that it was going to be serious, it was going to be downbeat, and what they were looking for was escapism. So they were much, much less likely to take a risk on something that they didn't know. They need much more information, much more reassurance.

You can read the quote on the right yourself about mining communities and Thatcher's era. There seemed to be, you know, something that was top of mind if you said a drama or a play. And maybe we need to think about how does TV do it? How do we sort of align the kind of language that TV uses, so that they're not immediately assuming that this is going to be a kind of a miserable experience, and they're going to be bored, and they're going to be trapped. And this sense of being trapped is really interesting.

A lot of the people who said they didn't really attend drama, but they attended other things, like potentially musicals, were really worried about their attention span. People said things like, I've got the attention span of a gnat, and there's no sense of escape. So there's this sense of, if I'm watching TV, it's really safe, because I can fast-forward the boring bits, and it's really comfortable, there's kind of low barrier to entry, but can we do anything to make them feel less trapped, and like they're taking less of a risk?

So, many of us do relaxed performances. Is this an opportunity to talk to people about the fact that you can leave the auditorium and you can return, you can feel more relaxed? Can we make that more possible at more performances? Can we up the ante in terms of the benefits, the escapism, the immersion, the pace? Given that those non-attenders do watch drama of all kinds, from thrillers to soaps, how can we sort of use their language and use the things matter to them to connect our productions better with them.

So in trying to work out how we might attract non-attenders, we also tested some kind of common levers that we often use in marketing campaigns in particular to attract people to come and see shows.

So the first one is around language. So we asked them what kinds of drama programmes they enjoyed on TV, and we used this really to test out various different phrases and pieces of language. So there was a difference for people, or at least the language that people used to promote those dramas. So on TV, our drama attenders said that they preferred crime drama, thrillers, political dramas, political dramas far, far more than our non-attenders.

Whereas our non-attenders were much more likely to say that they enjoyed true-life dramas. And this came up quite a few times, this idea of true-life stories, and we'll see that coming back in a moment. They were also more than twice as likely to watch soap operas. So, is there, again, is there more that we can learn from the way that those TV programmes are promoted, the way they talk about themselves.

To help people kind of overcome that barrier and that sense of what theatre drama might be, we also looked at the kind of other language and jargon that we're using. I said at the beginning that, like, the idea of the word drama or play was much broader for those people who didn't attend drama, was also more off-putting. So on the right-hand side, we see people who are comfortable with coming to drama are quite happy to say, yep, drama, if you tell me it's a drama, if you tell me it's a play, that appeals to me, I'll go and see that. Whereas on the left-hand side, that was really down low at the bottom.

But if you said things like a hilarious tale, or a true-life drama, or a psychological thriller, they were much more likely to have appeal, they just needed more, they're not in that world of knowing exactly what the code is when you say drama or play. And then, non-attenders were much more driven by social occasions and celebrations to come and see a show. And I think it's worth us just really looking at ourselves hard and asking whether we really do use these motivators enough for audiences, or do we always tend to lean into the theme, the cast, the creative team, and forget that the motivators are so often about more than the show itself. Interestingly, we saw very, very similar findings in Tomorrow's Audience, which was our hot topic a couple of years ago on first-time attenders, but it really bears repeating. People come to the theatre because it meets a need for them at that time, and that need might just be a social night out. That might be the main driver. So, can we use this more to help us?

Then despite being less concerned than we expected about famous faces, it's absolutely true that familiarity and points of connection matter more for those new audiences. Drama audiences tend to be more confident, more experimental, they like variety, they're happy with more challenging work, they know what this is all about, whereas our non-attenders are still looking for entertainment, looking for recommendation, and the reassuringly familiar.

But what does that actually mean? When we say familiar, how does that break down? And in the report, you'll find there's actually a lot more detail around this than we can cover today. But one of the things that was quite interesting to us is they didn't just talk about familiarity being a cast member, or being, you know, a big title like *Stranger Things*, for example. But sometimes it might be, like, a familiar Shakespeare show. So there's one person who hardly ever went to drama.

But she said... she talked about how she wanted to see something she could rely on, so she basically said, I've seen *Much Ado About Nothing*, basically multiple times, because I know I like it. So, you might not necessarily think, oh, here's somebody who hardly ever comes to a play, let's market some Shakespeare to her, but for her, that was a kind of stamp of reassurance. And then we had somebody who doesn't go to drama, who's decided that he wanted to learn about opera, and he was one of those kind of happy soloists just going along, because he wanted to learn.

But he absolutely was starting with the names you hear all the time, so he knew that these had some sort of stamp of quality, they'd stood the test of time, so he knew that was the first thing to try. But we also found that things like adaptations, familiar titles, were, again, just points of connection, and one of our non-attenders talked about having a kind of web of connections to something, and the more points that they could connect with something that meant something to them. Even if it's, you know, a book they'd read at school, or something that someone had mentioned in a conversation they recently had, the more likely it was that they would convert.

The one that really surprised us was this idea of local stories, and this connects again back into that true-life drama sense. So we had some people who were even... they called themselves theatre haters in the group, and, you know, we were finding it really hard to crack. If there's anything they were going to enjoy, they were like, no, none of this. And then there was this moment where somebody talked about the idea of local history stories, something had happened in the local area, you know, that's why my town is, you know, on the map. And even those theatre haters at that point started to get really interested. And this one at the top, when it says Drama Non-Attender, she was one of the ones who said, I do... I hate theatre, I'll go and watch a podcast recording, I'll go and watch some stand-up, but I do not like theatre, it's boring. And she said this, that, you know, can I just say the idea of local history is incredible, and I'd definitely go if that was put on, I've never thought about it.

So, we know that we always tell, very, very frequently, lots of local stories, meaningful, relevant tales about our towns and our cities, but are they hearing that? Because the type of language they're expecting are things like true life story? Is it that we're just sort of not quite hitting the mark and communicating it? I do love the second one, though, that I'd probably want a fictional ending, because most of the endings suck in real life. So we should bear in mind, they still don't really want something that's depressing. They want to have a good time and to feel uplifted.

Then we also tested a few other levers for new drama audiences, things that are kind of in our control and that we often try out and assume are going to help us. And the first one of those is price. So, it's absolutely true that non-attenders were much more price aware, or sorry, were more price aware, but not actually by much, so there wasn't vast differences in terms of a sense that pricing would encourage me to book. The ones that maybe slightly stood out ahead of the drama were pay what you can, and a money-back guarantee, which is quite interesting. And lots of them could talk about different season savers and things in their local theatres. And maybe, again, it's something we can leverage a little bit more, where you do, if you do have a subscription model, or those kind of, you know, buy three and get a fourth show for free, could that be the drama to help reduce all of those risks and encourage people to give it a try?

And even that money-back guarantee, you know, it's interesting. What would happen if we said to people, if you don't like this show, it's the first time you're coming to see it, we wouldn't say it to everybody, of course, but first time you're coming to see it, if you don't like it, leave it at the interval and we'll give you your money back. Are there other levers we can just pull to help people feel like this is less of a risk for them? And that's what we need to do to get them over the threshold, because we know they'll probably love it when they're there.

And as I mentioned before about these points of connection, even for non-attenders other points of connection than the actors were more important. So, about half of people talked about an actor that they've heard of, both drama tenders and non-attenders, being a good encouragement to book, being helpful, and of course, that spans a huge range. It could be, like this person said, Macbeth with David Tennant, or it could be someone they're a particular fan of. When we explored that, there really is a very, very small pool of actors that have that pull, that kind of cross art form or cross-distribution format pull to really convince people to come. Whereas actually, when we look at our non-attenders and what they talk about, one of the big differences versus attenders was this idea it's previously been in the West End. That suddenly opens up a bit of a gap, and we know that from talking to them, a lot of that is about that sort of stamp of reassurance. If I don't know what it is, and my friends haven't told me about it

because they don't know what it is, because they don't go to drama. What can I get that's some sort of stamp of reassurance on it?

Interestingly, that was of more value to people than reviews. So they were much more likely to go, okay, it's been big in the West End, I've heard of the title, there's an actor in it that I'm a particular fan of, a specific fan, which was, although that was very important to people, was quite unusual to find. It's an adaptation, it's an interesting theme or story. These are all more valuable than seeing good reviews, which is surprising, I thought.

So, as we said, these West End transfers reassure, so we gave them a few different strap lines that we might want to use on things, and said, which of these things would actually make you more likely to book? And again, at the bottom, we've got a review there, and our drama non-attenders, you know, they see it as slightly more reassuring and useful to persuade them than our drama attenders, but not a lot. Whereas this direct from London's West End was a huge kind of stamp for them. So, obviously, we can't always have drama that's direct from London's West End.

But how could we sort of create that sense of, sort of a stamp of quality in their mind, or reassurance that a lot of people have seen this, and it's been in, you know, a big, important theatre, or whatever the perception is for them? For them, as you might expect, creative team has much less sway. They don't have those points of connection, necessarily, that they really understand drama. So an award-winning writer and director, or writer of a great TV drama that I've seen isn't necessarily enough to really encourage them to book in comparison with other ideas.

So, that's a kind of whistle-stop tour through some of the highlights of the research. This is just some shots from the toolkit. So the toolkit uses that audience insight from that primary research and from the venue's experiences, there's lots of case studies in here, to create ideas and inspiration for each stage of the process of planning a campaign through to having the show on stage to just really enable people to go through that systematic assessment of whether campaigns are meeting the needs of non-attenders.

So, the aim is that it's full of ideas that people shared with us during the project, short case studies, suggestions from how... of how we might turn the insight that we gathered about audiences into action. The idea is that it is, you know, it's a live process, and one of the key things is about how you then turn this into something useful to use. So, I'm going to hand back to Claire now to talk a bit about how the whole of TNP did this on the tour of Handbagged. So, Claire, back over to you.

Claire Ward, Curve Theatre:

Great, thank you, Kerry. You, do you want us to stay on this page, and then, I'll just do a bit of a pre-waffle. So, I think what was, when we were going through the research and toolkit development process, we were nearly the end of our journey when we started our producing journey for Handbagged, and it seemed like such an ideal opportunity to sort of start testing some of these findings. So, I worked really closely, whilst Queen Theatre Horn Church were the lead producers, I worked really closely with the artistic director there, Alex, and the marketing department to really work out how we could, sort of guide each of the receiving venues for the tour in order to test the research and use the toolkit.

So, nothing I'm gonna say in the next 5-10 minutes is rocket science, but I'm hoping that what it does is, sort of, it really frames what Kerry's just talked about, and how we can practically use this as marketing departments as organisations going forward, and I think because what's really a challenge is sometimes, you know, and I know from having a marketing background, you know, how busy all departments are, but this is an opportunity to stop and think.

I think it's an opportunity to challenge some of the things that we receive, or some of the things that we write, some of the way that we position work, how we communicate to our audiences and it's where the toolkit really comes into its own is that it makes it into a really easy and digestible, set of standards that all of us can just, sort of, you know, I think there's even a press for emergency help button, within the toolkit, so when you're at that moment of just going, how... what should I do, with a drama campaign or a show campaign, you know, it takes you back to the basics and frames it around the research, reminds you of some of the key points within the research so that you're not sifting through a wonderful 100-page document in order to find that little bit of nugget that you need right at that particular moment.

So for Handbagged, we produced a 10-step guide, which, you know, was quite a challenge. It's not, you know, it wasn't, you know, universally received, positively. There was challenge, there was conversation, but, you know, that is the whole point, you know, we need to be talking more as an industry and sharing our learnings. So, but I think, what I'm going to do is I'm... I've got... I've summarized them down into about 7 tips, but I'm just going to go through some of the things that we used, and then also then refer to the Handbagged campaign and talk about Curve success in how we used these top tips, but also then the... the success that we received, in particular for Handbagged.

So, the first one is about language. It's about... it leans into familiarity, which Kerry's talked a lot about, and it's about our jobs as marketers in particular, to really challenge some of the specific words. How we're talking to audiences, and really look at what we're pulling out, and how we're using our show copy to speak to audiences. So, one of the things that we did for Handbagged quite, quite early on is actually we added a tagline. You know, the show, the show artwork was beautiful, the copy was great, but actually it really didn't pull out the fact that this was a comedy, you know, you had to really dig into that information to actually go, oh, this is a comedy. So we put comedy. Knowing that that was a really key, fundamental part, you know, we needed to communicate to audiences that they were going to have a good time, they were going to laugh, they were really going to enjoy the show, so we added the word comedy into a tagline.

But we also then leaned into, for those of you who don't know the show, you know, Handbagged centres around the Queen and Margaret Thatcher. So we really sort of pulled out the familiarity, you know, we changed, we didn't call, we, we used the Iron Lady, which wasn't anywhere in the copy, we used that in the tagline. And that really helped then, and we added that to the artwork. So actually, that first instinct, you've got those iconic figures, but then you've got that reassurance of, okay, this is a comedy, yeah, it's definitely about the Queen, it's definitely about Margaret Thatcher, I know that, okay, I've got that familiarity, and that was really clear from the offset.

The next thing is just an encouragement, really, to think outside the box, and think outside the box in terms of who the target audience is. Very early on, it was stated in the research that, you know, there's no such thing as a drama attender, you know, with 76% of those stating that they attend both drama and musicals. So even, you know, we all use our databases on a regular basis, but, you know, I know we can all fall into those, okay, we're going to target previous drama attenders for this upcoming drama show. Don't, you know, think about the themes in the show, and, you know, expand that, explore, test, how are you communicating? Because just because that audience member may not have booked tickets to see a drama at your theatre, they may have gone somewhere else to get their drama intake.

So do think about who your audience is, and don't fall into those loopholes, those traps, those assumptions, that if you're... if you attended drama before, that's all you attended, that's all... they're the people that we're going to speak to for this campaign.

Apologies to my team, who have heard this rant quite a lot from me, in terms of pricing and discount who are on the call, but stand firm on your pricing, be confident, you know. It clearly showed that we are undervaluing and underpricing our drama productions in terms of what people are willing to pay, able to pay, but also in comparison to musicals. You know, they are not getting a worse experience

by coming to drama. You know, we need to stand firm on pricing, and, you know, it was clear that even when just looking at the drama attendance, they had a higher than average income than those that were coming to a musical, but we all fall into those loopholes of just going, oh my god, sales aren't good enough, I need to drop the prices.

You know, but actually, what... if you look at the research in a little bit more depth, you know, drama audiences just take a little bit longer to get over the line. They're very different in how they need to be communicated to they need a few more touchpoints, you know. You might not get that sale just by sending that one e-flyer, they may need a follow-up on social, they may need a second e-flyer, they may need that brochure during the post. But stay confident in the product, and also stay confident in the pricing, and that discount is just rewarding bad behaviour for booking late.

Next slide, please, Kerry. Oh, I sound like I'm going back to 2020. Okay, one of the most...Moving on from that point, but staying in a similar area, one of the things that we tested and tried on Handbagged was actually starting our campaign earlier. So, thinking about the length of time that we needed to communicate, and how many touchpoints a drama production may need with an audience member in terms of getting them over the line and booking tickets. So we actually moved some of our campaign to start a lot earlier than what we usually would do at Curve.

And that was... that was... but in order to do that, you also need to make sure that you've got the right assets in order to keep, sort of, mixing up and changing those touch points to get people over the line. So we started our campaign earlier, and I think it... and it... and it proved really worthwhile, and I'll talk about the results that we did with social advertising shortly, but that was a really key turning point, I think, for all of us at Curve in terms of starting that campaign earlier, and not falling into, oh, okay, right, you know, okay, that show is at X amount of weeks out, and therefore I'm going to start then working on that campaign 12 weeks prior, going back to what Kerry said, in terms of those motivations to attend, you know, don't fall shy to express how people are feeling. You know, we do this a lot, but actually we don't emphasize it enough.

You know, we do talk about it as an industry on how great theatre is, but actually, think about, you know, if you're doing vox pops, or have got vox pops, what questions are you asking? You know, to get those little nuggets out, to actually really demonstrate to an audience member how they're going to feel both during and after the show, in order to sort of give those reassurances, you know, for people to see others in, you know, experiencing that drama, and knowing then... having that confidence that they're not going to be bored, that they're not going

to need that escape, you know, that they're not going to need to escape or pause like they do on the TV.

Going on to the next bit, don't let this research... I mean, I've just had a look very... and see a lot of familiar marketing names, which is wonderful, but please don't let this research sit just within a marketing department. That wasn't the overarching objective of this research and toolkit. It needs to be shared with your executive team, with your board, with your programme departments, producing, learning.

All of us can learn from this. And that is right from the beginning in terms of choosing the title when you're making those programming decisions. When you're going to those programming meetings, when you're thinking about the learning packs and the creative engagement around the show, all of this research and these toolkits can be beneficial for that early-stage decision-making, and having that confidence across the organisation and also reframing and reshaping the picture of how drama productions are viewed, across the industry.

And then, last but not least, share and test. You know, we're in this together, and we need to talk more about the challenge... more openly about the challenges that we're having. And, you know, I'm really happy, you know, we... we... we tried all of this on Handbagged, and... don't get me wrong, it was a wonderful show, but I'm delighted that in some of the results that we received. So to give an example, so we... so Handbagged finished at Curve on a 96% occupancy with 74% of the tickets being sold at full price. And I think, you know, in terms of that pricing, just having that confidence, you know, I'm not saying don't discount, we all need concessions, and we absolutely should stick by them. And I think... but we don't need to do that last-minute panic, as much as probably we sometimes assume that we do.

But one of the most successful results that we did was actually by experimenting and testing our meta campaign. So, we set up our digital advertising, which, again, started earlier than what we usually do. We invested more money in order to allow that, and... but we set up 3 different ad sets. So, one was to musical enthusiasts. The second was to drama enthusiasts, and the third was to comedy enthusiasts. And the ad set... all three ad sets delivered results. But... The top ad set delivered the best results with 42% of the overall sales coming from the musical enthusiasts. Now, I don't believe that we'd ever really gone to that specific ad set as a test for a drama before. But we're certainly doing it now, more and more in our campaigns, and thinking about how we're framing that, so to give a bit of a specific, in order to sort of prove that it can work. But I think just keep it simple, don't overcomplicate it, use the toolkit.

It's really easy and digestible, and I think the next bit we're going to do is open up to questions, aren't we, Kerry?

Kerry Radden, Indigo Ltd:

That's exactly right, yes. So, thank you so much, Claire, that's really, really helpful, and just really nice hearing figures like that, I have to say. Gonna kind of bathe in the glow of it.

So, I know that Helen has been keeping an eye on the chat, but just gonna throw over to Helen to see if there are any questions as yet.

Helen Wintle, Indigo Ltd:

Yes, we've had a few come through so far, both in the main chat and also a few private messages, so I'll just pick a few out and, like, merge a couple that have some, like, similar themes.

So to start with, we have, a sort of... this is an emerging one. So, if you could pick one thing, what have you found, like, most useful or interesting or surprising from this, research and project?

Kerry Radden, Indigo Ltd:

I think that's for you, Claire.

Claire Ward, Curve Theatre::

For me, it was don't overlook the obvious. I think, you know, adding a strap line to Handbagged was such a no...easy thing to do that everyone just went, oh yeah, that sounds like a really good idea. You know, got complete buy-in immediately.

From all of the producers, the artistic director, and they were really happy with it. We collectively came up with this, strap line, and it just was such a simple thing that I feel made such a significant benefit to the overall campaign.

Kerry Radden, Indigo Ltd:

Brilliant, thank you. Helen, any others?

Helen Wintle, Indigo Ltd:

Yes, and we have a few more coming through as we speak, which is lovely.

So we have one from Hannah, which was, it looked like drama pricing was 10 to 20 pounds, so how does this link to the earlier slides about discounts and price points? I don't know if that's more specifically about, like, price sensitivities of drama attenders and non-attenders, and that kind of point, because this was when, Claire, you're on the slide about top tips and talking about being brave and standing firm on prices.

Claire Ward, Curve Theatre:

Yeah, so the data, Kerry, correct me if I'm wrong, was obviously the average ticket price. So it would have included any discounts, or any concessions, or any complimentary tickets, so obviously that will then, impact the average yield, which, however, you know, as I said, you know, we... we stood firm on Handbagged.

We honoured, obviously, our standard concessions, and, you know, we were able to actually sell you know, 74% at full price. You know, price was not a barrier for attendance, and I think that is just the important part, is price isn't necessarily... actually don't come to price as the first thing you need to fix. You know, go back to the toolkit, look at the checklist and think, right, what's my copy like? You know, what is the image actually saying? You know, can I add a strap line? Am I telling people what this show really is about, and how they're gonna feel? You know, where are the familiar touchpoints that I can add into the campaign, add into any of your copy that you're using, or on e-marketing, or social, or brochure. So I think don't always just go immediately to, oh, people aren't buying tickets to... because it's too expensive, I need a discount. No, actually challenge some of the other areas of the campaign, actually, before you then start to look at price.

Kerry Radden, Indigo Ltd:

I think that data just shows the danger of when we look at our data historically and we think, oh, that's all people will pay, but actually it's not necessarily all people will pay, it's just what they ended up paying. So, you know, it shows that there is a lot of... a big gap between musicals pricing, where, you know, as we say,

we might have lots of non-drama attenders, but people who are coming to the theatre, and then what we're doing with drama. So, in a way, it also points to the possibility of some headroom.

In that, and some of those outliers were really high price points, or not price points, sorry, average yields, so it is possible to, you know, be more confident. The data's, weirdly, even though it looks lower, is kind of telling us that there is potential to be more positive.

Helen Wintle, Indigo Ltd:

Lovely, thank you. We, obviously, I guess we have a lot of marketing people here, we have a lot of marketing questions.

So I guess to sort of summarise some of the aspects, but I can pick out a few specific ones, but I guess, as this toolkit is sort of being aimed at marketers and programmers, is there a place that you would recommend starting? Is it, like, the messaging and the USPs, and the framing of the show in particular, or is it what's being programmed, or is it more chicken and egg.

Claire Ward, Indigo, Ltd:

Oh, I can look at all of it. You know, I think in terms of, and I think that's why it's so important that this doesn't just sit as a marketing toolkit, you know, it's an organisational toolkit that needs to be used widely, so I think sharing this internally is really, you know, I took the findings in the toolkit and did a bit of a summary: for our Board of Trustees here at Curve, and it opened up such wonderful conversations and questions, and I think that's what... that's the starting point, actually, having the conversation, because all of us are all in very different positions in terms of where we're programming and how we're make... and those decision, making processes, so I think actually just having the conversation is actually the most important start point, and then using that to then inform some of the other decisions that are later down the line, in terms of, you know, your copy, your assets.

And I think, sorry, Helen, I'm looking at the questions as well, and someone's asked about how you challenge an external producer with regards to something that you've given. Have the conversation, you know, share the toolkit, you know, share the findings, and say, look, you know, test stuff, you know. Ultimately, that producer is going to want to sell tickets, you know, that is going to be the... and get as many people in their audience, you know, so they may be willing to test

things out with you, if you're willing to invest the time to reframe and, challenge. And sometimes, you know, when I say challenge and look at the language, you might just change one word. You know, please can I remove the word political, because actually I think that's a bit of a barrier to our audiences, and I'd like to test it.

And, you know, all of us can do, you know, A-B testing in terms of that, sort of, in terms of our marketing channels. So, start the conversation. I think that that's going to be the most important thing.

Helen Wintle, Indigo Ltd:

And I think as well, picking out, obviously, like you said, you're reading them as well, like, with Amy's comment about, having approved copy from producers, or whoever might be a tour... a touring venue, or a particular touring company, and sort of thinking about how you might approach that in terms of buy-in with the testing.

Claire Ward, Curve Theatre:

Yeah, have the conversation. You know, use the research, use the toolkit as a leverage. You know, this is not just Curve's research, this is not just the Nationals, and it is research. This research has been informed by the industry as a whole, you know, Kerry talked about the number of venues that contributed their data in order to inform this research and the development of this toolkit. So it's not just coming from one venue. You know, we wanted a really good snapshot of drama attendance from across the UK, and that's what we achieved.

Kerry Radden, Indigo Ltd:

I do think there's, you know, coming back to what's at the heart of a lot of the work that we do is that idea of the collective power. I mean, it's not going to be an instant fix to speak to a visiting producer and go, we're going to fix this by waving this magic wand. And they're going to go, yeah, brilliant! But actually, if we're all starting to sing from the same hymn sheet and asking the same questions, then hopefully, in time, it starts to chip away and you start to find those little chinks where you can try and test something new with openness and saying, it might not work, but we're, you know, we're joining you on this testing journey. But I think it's having that confidence and not just feeling, sort of, like there's no way forward. Because, you know, at least there's some evidence you can try and present as to

why you're asking for that. You're not just being awkward, you're actually asking it for a reason.

Helen Wintle, Indigo Ltd:

Another question we have is a bit more about, like, the application of the toolkit, which I thought could be helpful to pick out. So, this is from Jess. We're a small multi-arts venue and rarely run... and rarely have a run of shows. Trying to plan a campaign for each one feels daunting. Will the toolkit work for one-offs?

Claire Ward, Curve Theatre:

Absolutely.

Kerry Radden, Indigo Ltd:

There's an element in there in the toolkit which is a lot about the storytelling of the venue, and basically brand building, and it can be really hard, and budgets can be really tight, but actually, a lot of what we've been talking about today is about building that long-term trust in what you're programming, and what you're talking to people about, so that's still really relevant, and actually getting off that hamster wheel of, you've just got to talk about what each play is about.

And hope that one of those themes hits the mark with somebody actually working out a way of saying, you know, how is this part of our overall story? And picking out, for me, a lot of it, when we work with venues, is picking out those kind of hero moments, where maybe it is a local story, there's an opportunity to hook more people in, and really investing behind that one, or those moments. But, I mean, it's not easy, is it? Let's not pretend. It's not easy. But maybe, you know, starting to use some of those ideas, I think you can pick and choose from the whole toolkit, and trying some of them and seeing if any of them would work in your situation. And please do keep sharing that, so as a sector, we need to keep learning about stuff that works in different contexts.

Claire Ward, Curve Theatre:

Yeah, and I think, as I said previously, you know, it's just an opportunity sometimes to just stop and think. And actually challenge your own assumptions.

But also allow the research and the toolkit to inspire creativity. You know, we are all creatives on this call, and we need to unleash that creative power within our marketing, and actually, this is where we need to sort of be braver and start testing, and exploring new avenues, and not just doing the same thing.

And doing the Eat, Sleep, rave repeat for every single show that we receive. You know, it's about looking at it as an individual show. And going back to the basics, and... Challenging our own assumptions.

Kerry Radden, Indigo Ltd:

Brilliant. We've probably got time for one more, I reckon.

Helen Wintle, Indigo Ltd:

Obviously, apologies, we're not going to be able to get through all the questions today, and I was just trying to, like, group themes, because obviously we've had a bit about pricing and a bit about, like, marketing and comms, but one I thought could be interesting, so obviously it was talked about during, the presentation in terms of, like, TV and TV drama. Sarah asked, how can theatre learn from TV and other mediums while still retaining theatre's core characteristics?

Kerry Radden, Indigo Ltd:

I mean, from the data side of it, I think the thing is that we... we came to this project going, let's just be bold, we never look at other stuff, we always think we're special and we're different, and the joy is that we actually are, and that people recognize that we're special and that we're different, and there is something unreplicable about the live experience.

And so that, you know, we can really, really lean into that, but I think a lot of the TV stuff was about the language, and about things like expectations about the experience. So when you watch something on TV, you always know exactly how long it's going to be, you have really clear kind of parameters around what this experience is going to be like, and TV programmes and film are never afraid of giving stuff away, of kind of telling you, this is what it's going to be like. You know, the number of times you watch a film trailer and you think well, those are the best bits of the film. I think still in theatre, we can be really, really coy about sharing that, and think, oh, but they have to experience it live, otherwise it spoils the whole thing. There's no evidence from other industries that that is true.

So, I think there's lots of things that we would have to be quite brave to look in the eye and say, actually, in other mediums, they do this well, particularly for new audiences, where they need, as Claire was saying, more run-in, more information, more touchpoints, more reassurance. If you bear in mind that most, especially most young people going to see a new musical, or indeed an established one nowadays, will have listened to the soundtrack loads of times before they go. So when they go in, you know, they know exactly what's going to happen and what's going to come up, but with drama, we tend to sort of conceal it and go, oh, yep, you've got to experience it in the moment. So I think there's a lot more confidence we can have in sharing more, and not feeling like it just all has to be hidden in order for them to have that emotional response, because it really doesn't. We can give them a bit more reassurance, a bit more hand-holding. I don't know if you'd agree, Claire, if there's anything else that...

Claire Ward, Curve Theatre::

Yeah, absolutely.

Kerry Radden, Indigo Ltd:

Thank you. Brilliant. Well, we've kind of run out of time. Bang on 12 o'clock. Really, really appreciate you taking the time, to come along. We will circulate round, recording. We will circulate round slides, but actually this is only a subset of the full research report, which is available, as we said, through the links and through the QR code that was on screen a minute ago.

And if you've got any questions or anything, please do get in touch with us at Indigo, and we can signpost you, info@indigo-ltd.com is our email address. Many of you know us already. And thank you so much for all of your questions. We will also look at those and think about, you know, whether there are other things that are useful to respond to, maybe in a kind of a more informal way.

So, really love to see you. Enjoy the rest of your day, and thanks again for coming along.