

Understanding drama attendance

Final research report

Theatre Nation Partnerships
August 2024

Led and supported by

**National
Theatre**

in collaboration with Theatre Nation Partnerships, primarily led by Curve Theatre.

Summary of research

Research objectives

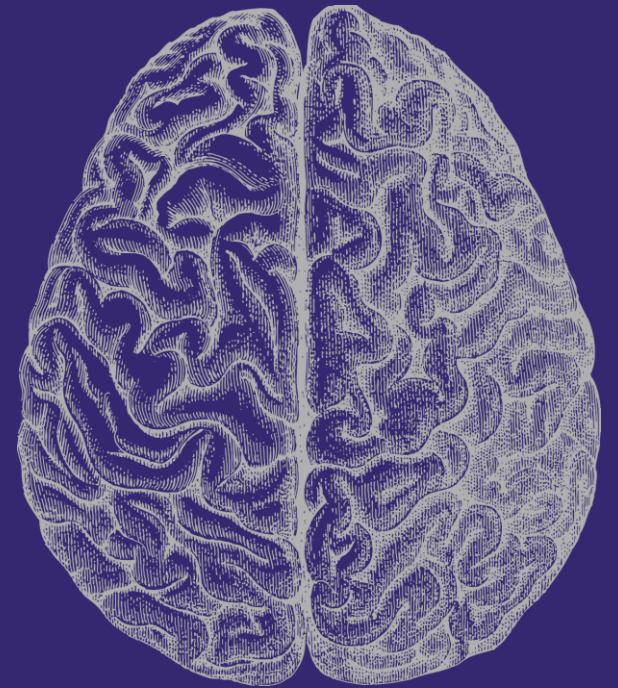
How do we attract new drama audiences and turn them into returning drama audiences?

- Understand audience behaviour in relation to drama
- Develop a deeper understanding of current drama audience attitudes and motivations around drama programming
- Develop a deeper understanding of the barriers for audiences who aren't attending drama (eg musicals attenders), including exploring price, positioning and communication
- Explore the definitions and perceptions of "drama" as a genre and self-identification with the idea of being a "drama attender/audience member"

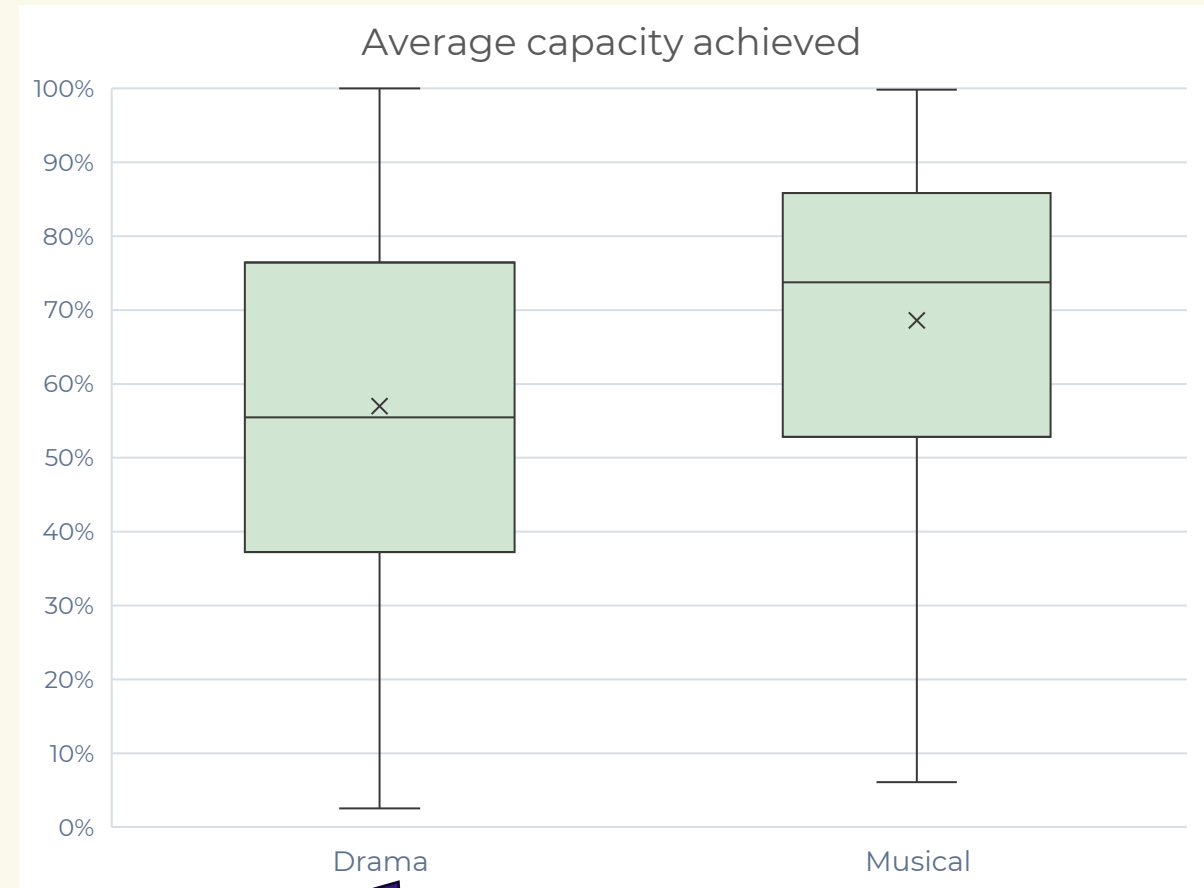
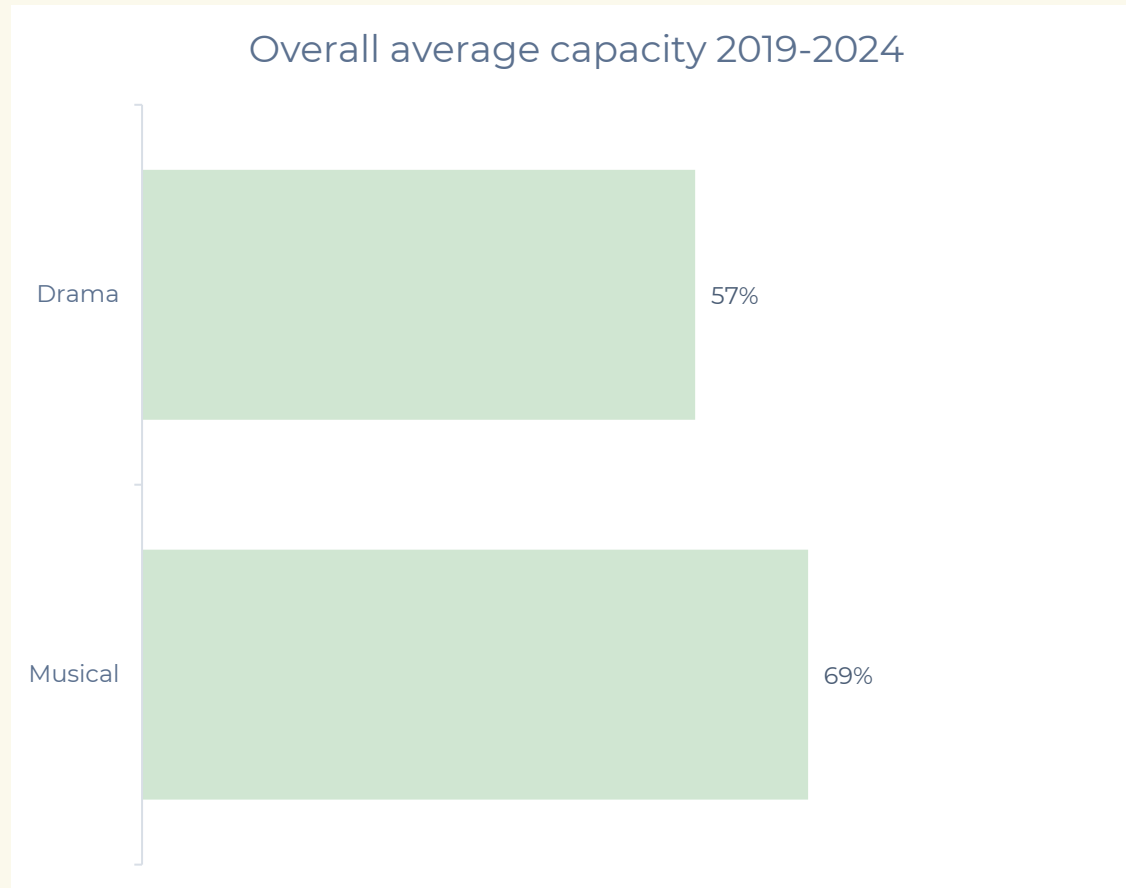
Methodology

1. Analysis of drama and (where relevant) musicals sales data for last 5 years
 - Selected Theatre Nation Partners
 - Regional theatres (thanks to Belgrade Theatre, Birmingham Rep, Chichester Festival Theatre, Liverpool Everyman & Playhouse, Northampton Royal & Derngate, Northern Stage, Nottingham Playhouse, Royal Exchange Theatre, Sheffield Theatres)
2. Sales and audience insights from *My Beautiful Laundrette*, including phone interviews with the host venues
3. Online survey sent to audiences by sample of Theatre Nation Partner venues
 - Curve Theatre
 - Theatre Royal Wakefield
 - Cast Doncaster
 - The Lowry
 - Queen's Theatre Hornchurch
 - Sunderland Empire
 - Sent to those who had been to drama in the last two years and those who had not attended drama (but, preferably, had attended a musical)
 - 2,036 responses
4. Four focus groups were recruited from the survey respondents and from the Indigo Culture Panel
 - Two groups of drama attenders
 - Two groups of drama non-attenders

**How does drama perform in
regional venues?**



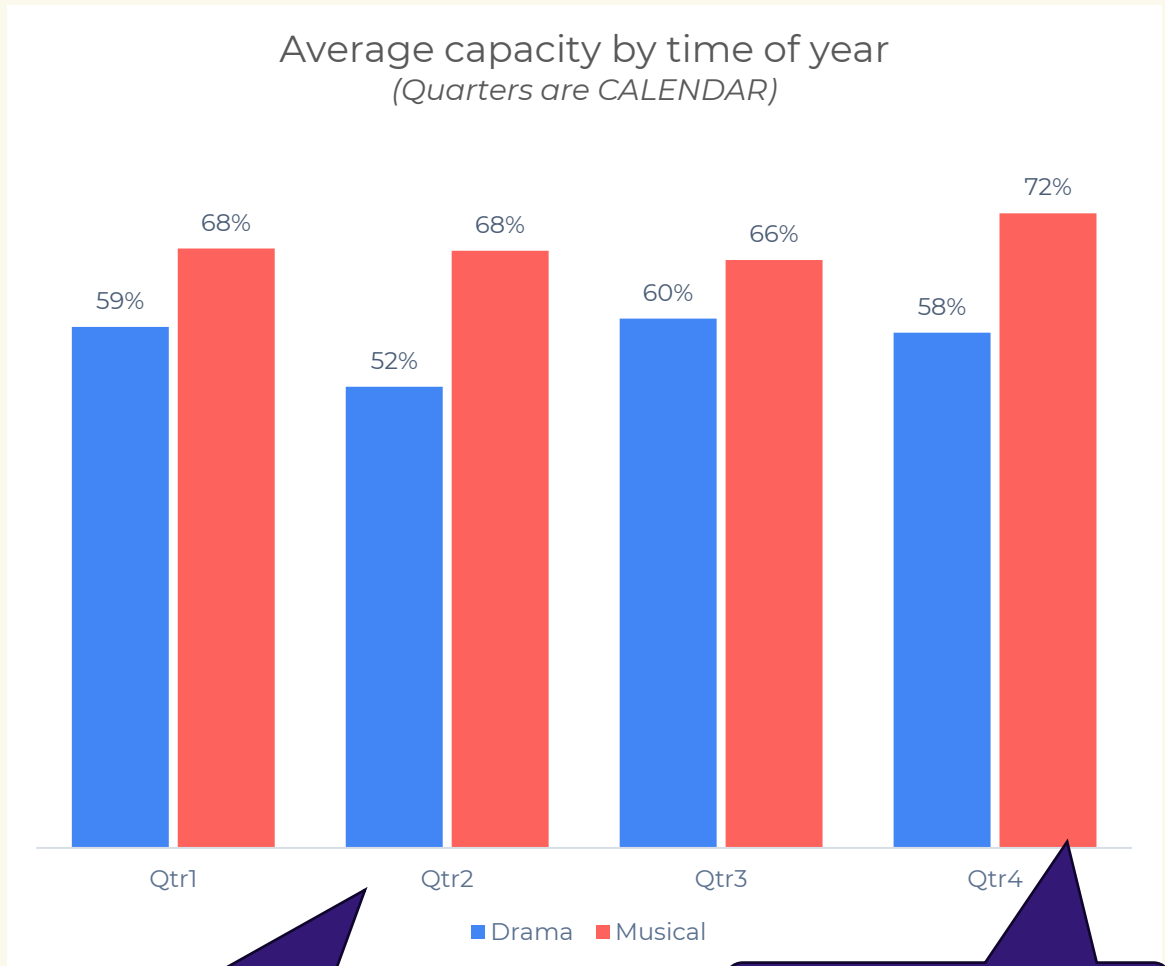
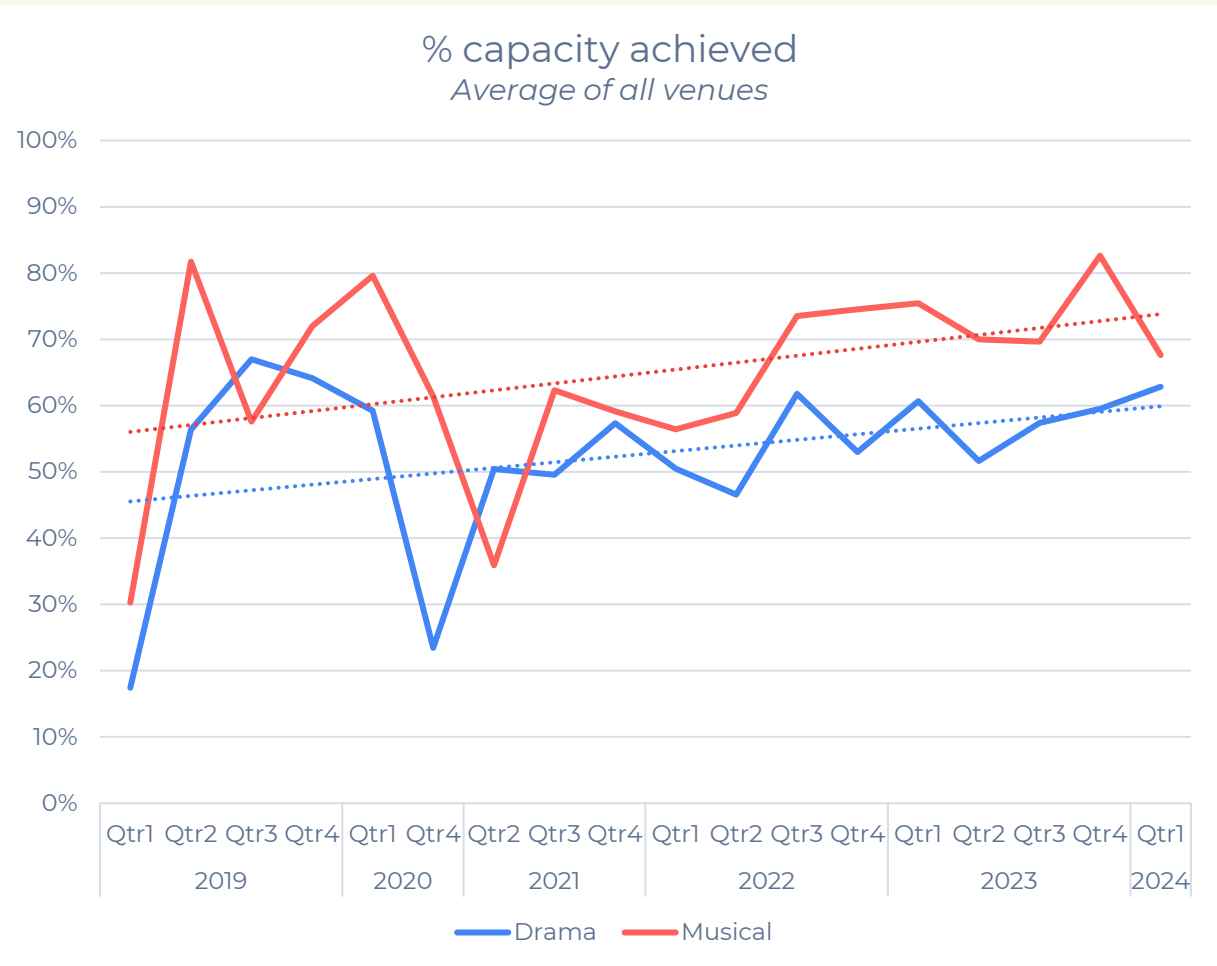
Overall capacity for drama was below that for musicals over the last five years, and had wider variance in performance



The slightly wider variance for drama could suggest less predictable sales or a wider variety of shows on sale

Overall capacity achieved trended up over the last five years for both drama and musicals, with musicals ahead

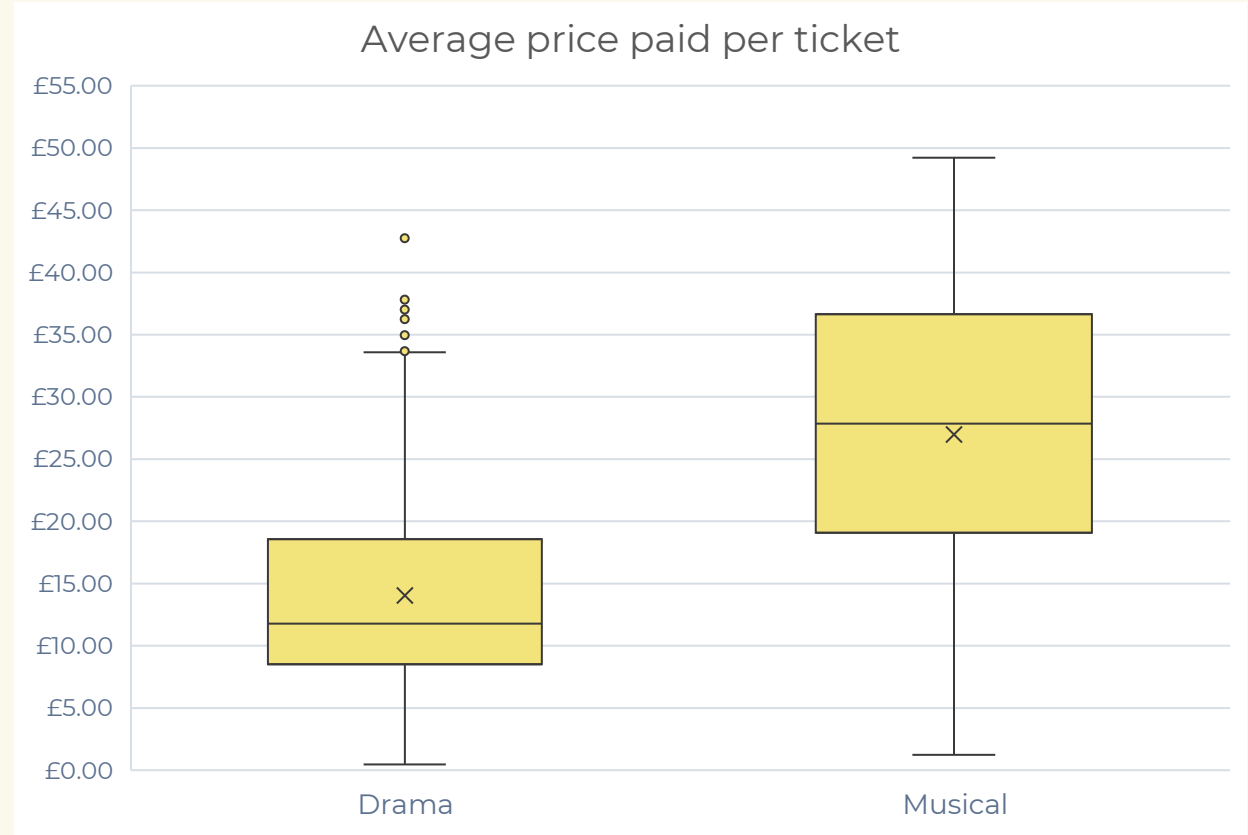
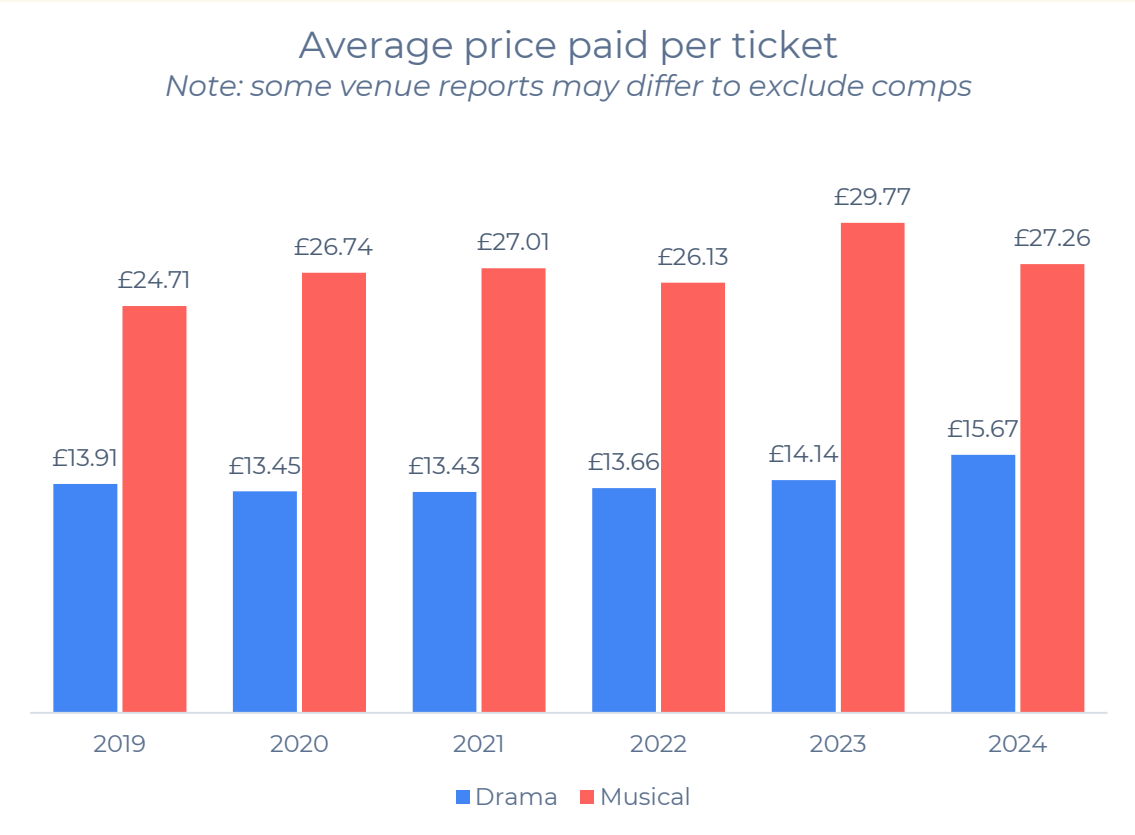
There are only slight seasonal differences in average capacity



Q2 drama results are lower than rest of year (Apr-Jun)

Q4 musicals may include some festive productions

Average ticket price paid is almost twice as much for musicals as for drama, which could suggest heavier discounting for drama

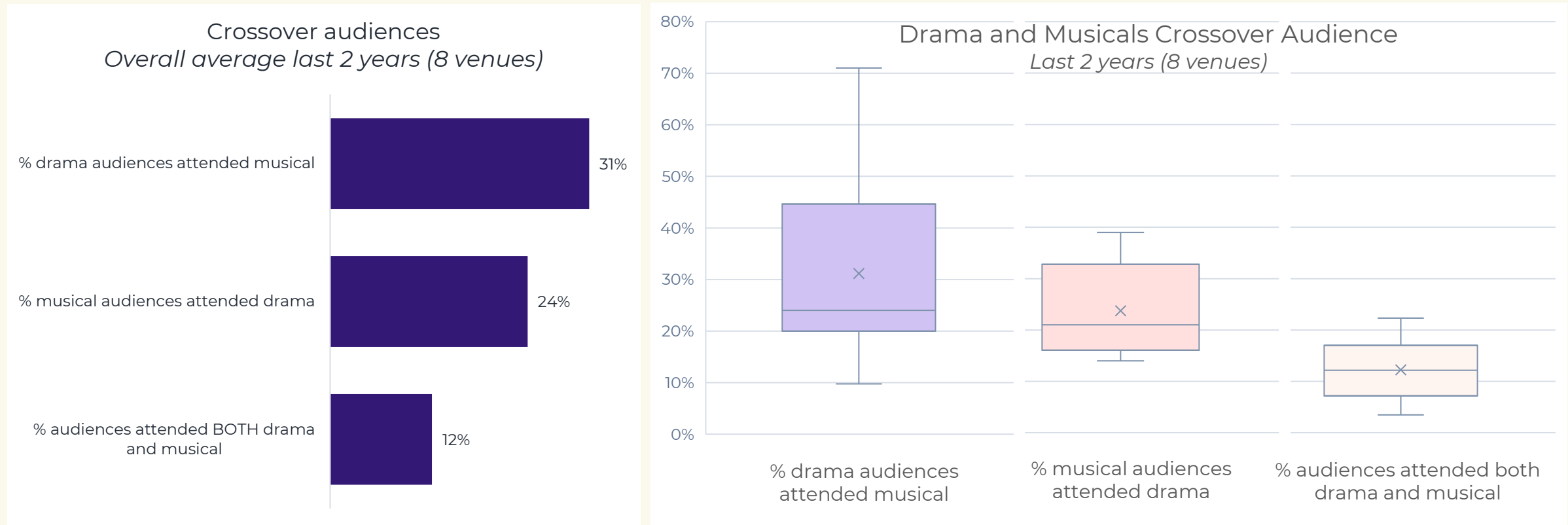


Although price can vary by venue, outliers tended to be big West End hits or famous comedy; note film/book adaptations which also emerge from surveys and focus groups later in this report

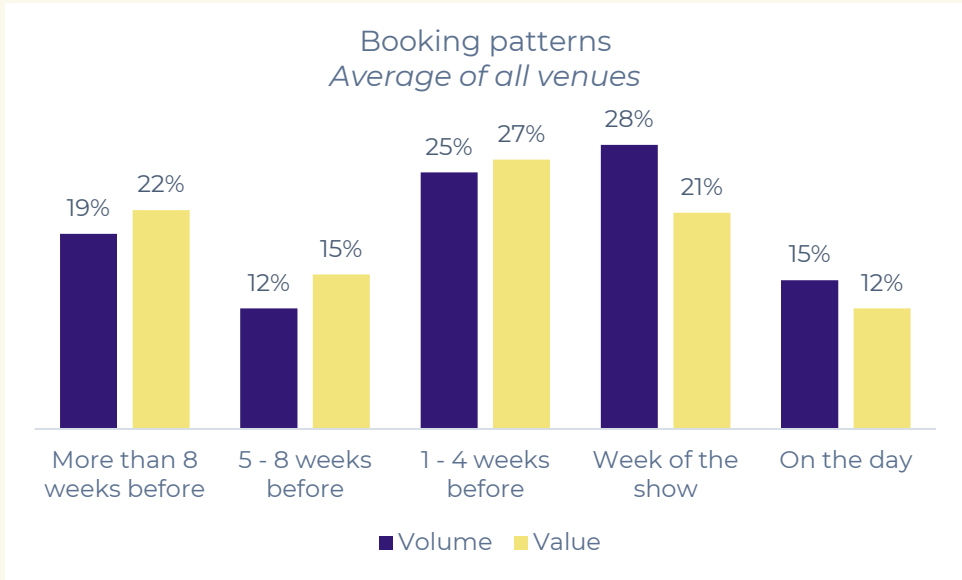
Outlier drama based on ATP	
Warhorse	The Full Monty
2:22 A Ghost Story	Drop the Dead Donkey
Private Lives	Noises Off
Magic Goes Wrong	Life of Pi

Source: Venue box office data; 11 venues

On average, just over 1 in 10 audiences saw both drama and musicals at the same venue within the last two years



Case Study: *My Beautiful Laundrette*, 2024

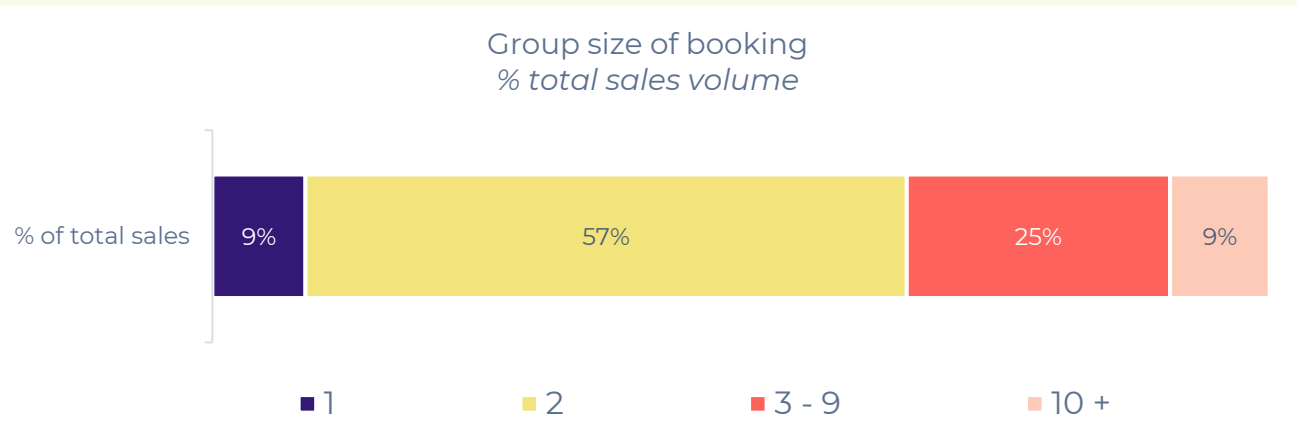


Average ticket yield

£18.27

Average capacity
(volume)

42%

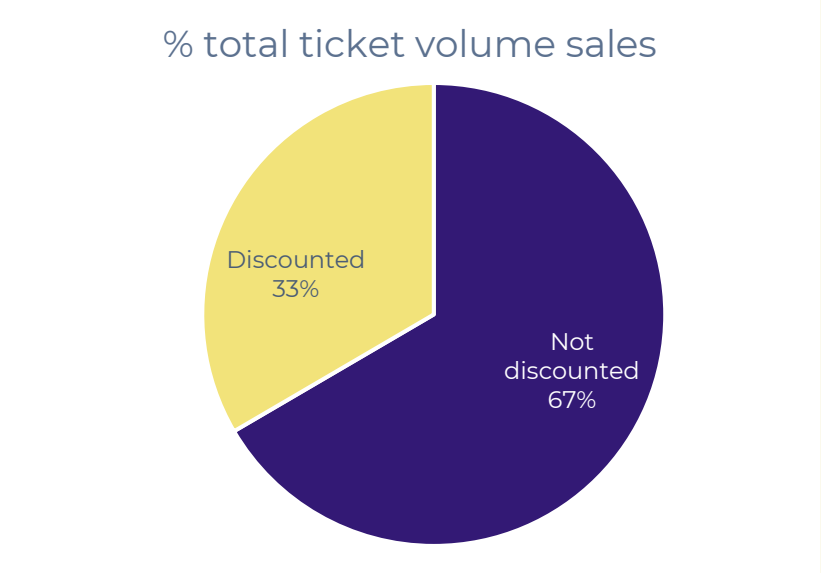
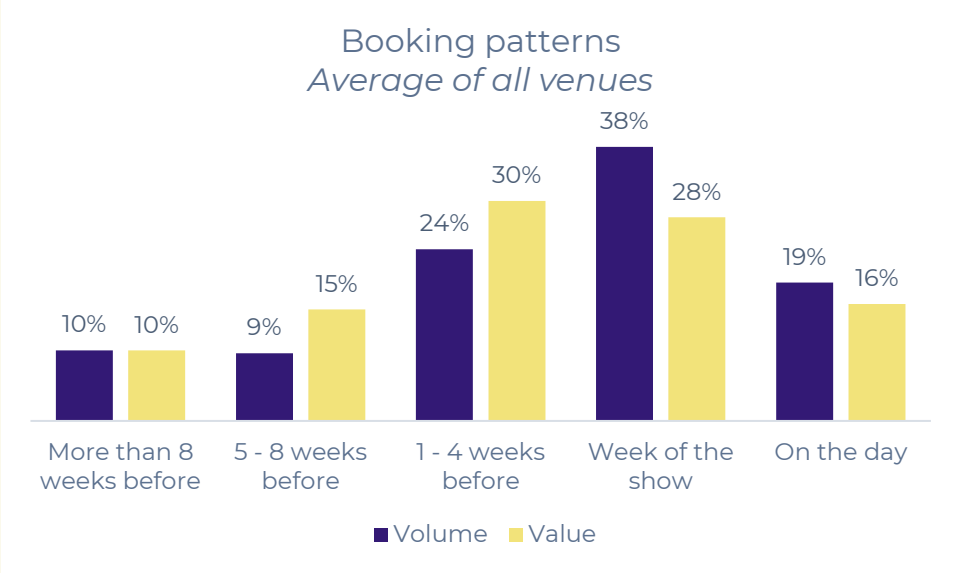


First time bookers

28%

Average ticket yield was higher than most recent benchmark.
Yield decreased later in the selling period during peak sales: is this discounting driving sales or unnecessary discounting due to later sales? Most venues reported a successful tour in terms of volume of sales.

Case Study: Suckerpunch, 2023

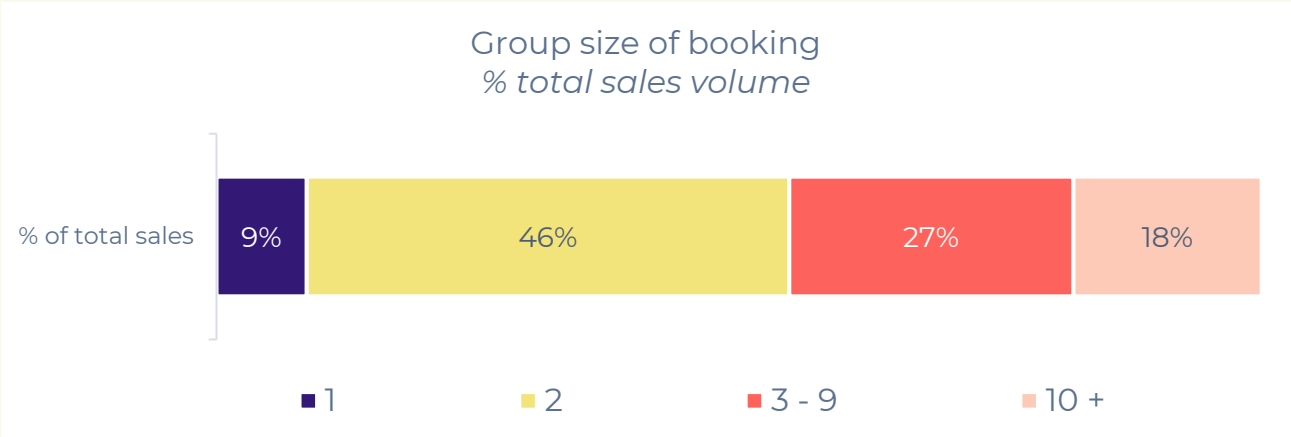


Average ticket yield

£6.35

Average capacity
(volume)

19%

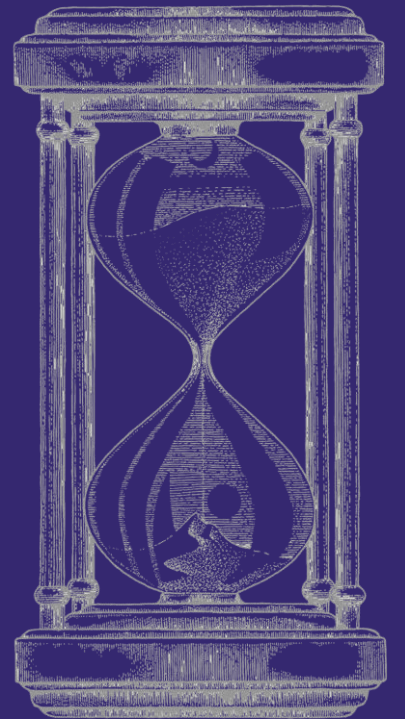


First time bookers

31%

Average ticket yield was lower on a more challenging title, but new bookers were higher, demonstrating the different outcomes for different touring offers. Almost a fifth of bookings were part of large groups of over 10.

An introduction to “drama attenders”



Who did we talk to?

Criteria for data

▪ Drama attenders

- Bookers who attended at least one production classified as drama between 1 April 2022 and 31 March 2024
- Could have attended anything else too

▪ Drama non-attenders

- Bookers NOT attending any drama between 1 April 2022-31 March 2024
- Ideally had attended at least one musical, but if numbers were too small, this was expanded

Self-defined in survey

▪ Drama attenders

- People who said they “sometimes” or “often” attended plays/ drama
- May include people who aren’t drama *bookers* or who attend drama at other theatres

▪ Drama non-attenders

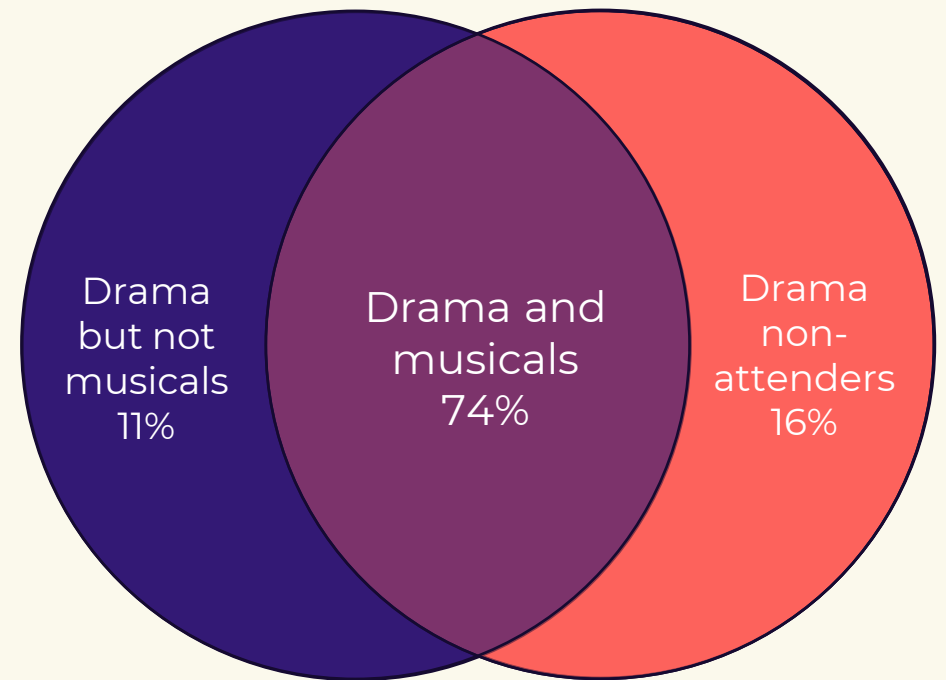
- People who said they attended plays/ drama “never” or “rarely”
- Does include some play attendance but only very infrequently

2 x focus groups

2 x focus groups

Firstly, there is no such thing as a homogenous “drama attender”

- Attenders and non-attenders are not two distinct groups
- We compared drama and musicals attendance as we felt they were the most “adjacent” experiences
 - 88% of drama attenders also went to musicals
 - 48% of them *preferred* musicals
- Some people do attend because they like the artform:
 - 97% of musical attenders go to musicals because they like them, and 93% of drama regulars attend drama because they like plays
 - Some respondents described not liking musicals as a genre, or not liking plays as a genre, but this sweeping generalisation can reinforce barriers: those who “didn’t like plays” tended to think they were depressing
- But others were more fluid in their language, talking about operas and musicals as “plays” or “drama”



Although there are differences between them, drama attenders and non-attenders also had a lot in common

Another crossover behaviour was around planning vs spontaneity of booking

- The survey data highlighted some **differences** in profile, behaviour and attitudes of audiences at aggregated level
- However, our focus groups revealed **common behaviours and motivations** across **both drama attenders and non-attenders**
- We therefore need to be nuanced in our approach and avoid assumptions: in some cases, a similar approach might actually work for both drama attenders and non-attenders

Some “types” common to BOTH drama attenders AND non-attenders

(Source: focus groups)



The Theatre Fan

“I’m known in the office as the theatre person to go to. Everyone thinks I’m the theatre guru.”
(Musicals and drama attender)



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.”
(Drama attender)



The Arts Experimentalist

“I’m open to anything: modern performances, very classical, 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”
(Drama non-attender)

In this analysis, we have mainly compared the two smaller groups (not the big crossover group) to highlight greatest differences and opportunities

- Since most people go to a mix of artforms, we have focused our comparison on the two groups whose attendance behaviour most differs
- This approach helps us to highlight differences in audience profile, behaviour or attitudes which can inform our programming, planning and marketing activity
- Everyone else is likely to fall on the spectrum between these two extremes
- Throughout this report, consistent colours are used to identify these two groups
- Note that our drama “non-attenders” may have been to see plays but only rarely and they were not their preferred genre

Drama non-attender

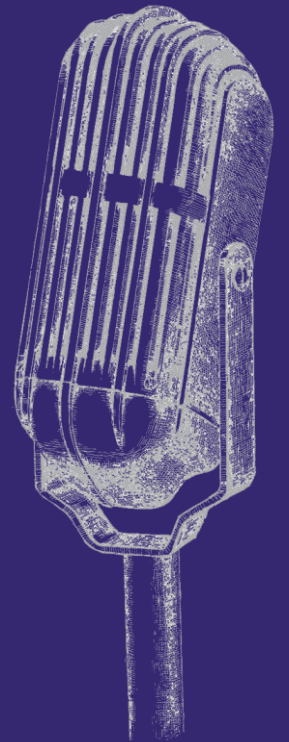
*Attend plays rarely or never
May attend other genres, including musicals*

Drama attender

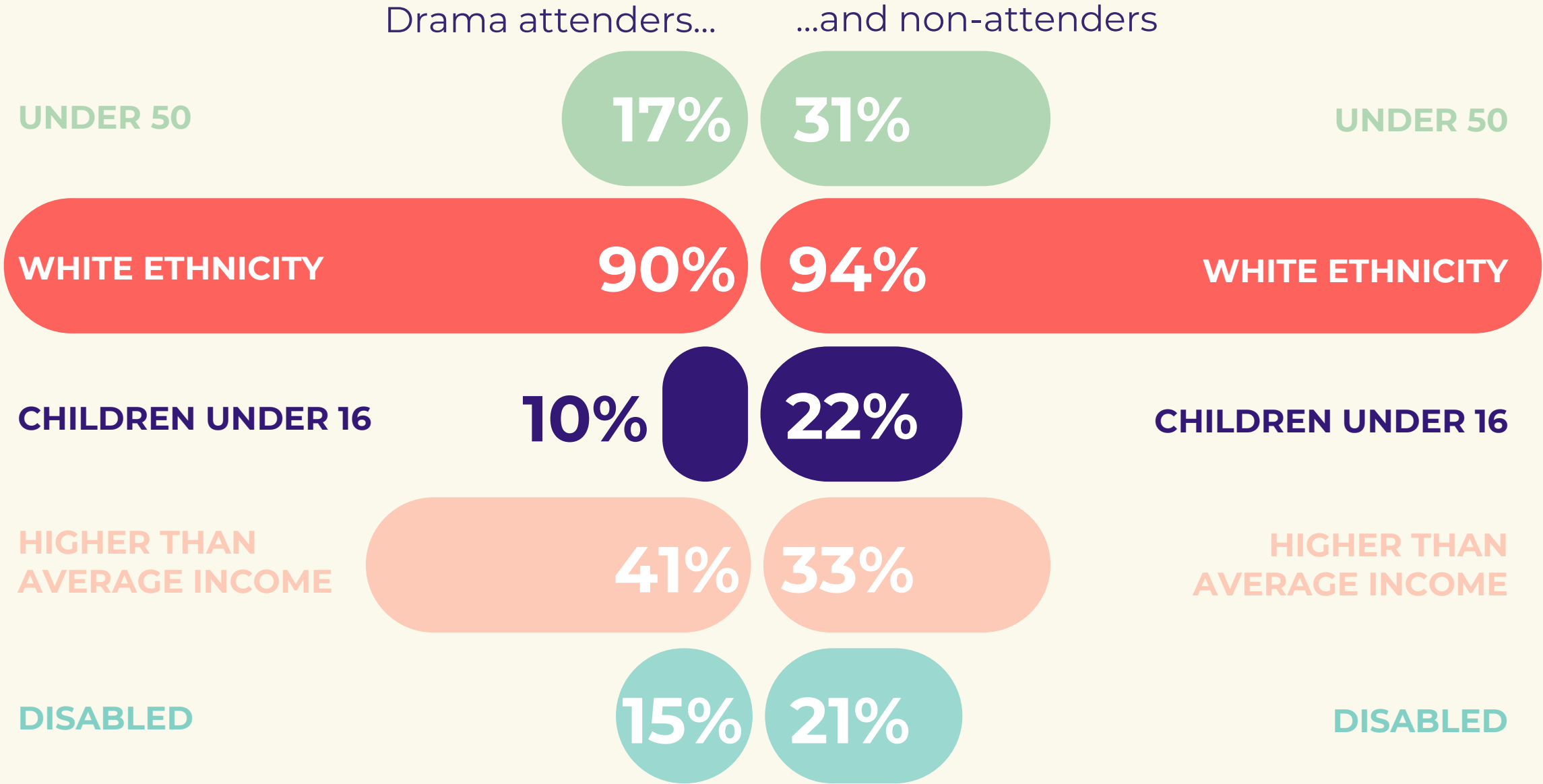
*Attends plays sometimes or often
Musicals rarely or never*

Audience profile

Drama attenders compared with non-attenders



The overall profile of drama attenders and non-attenders differed in many areas

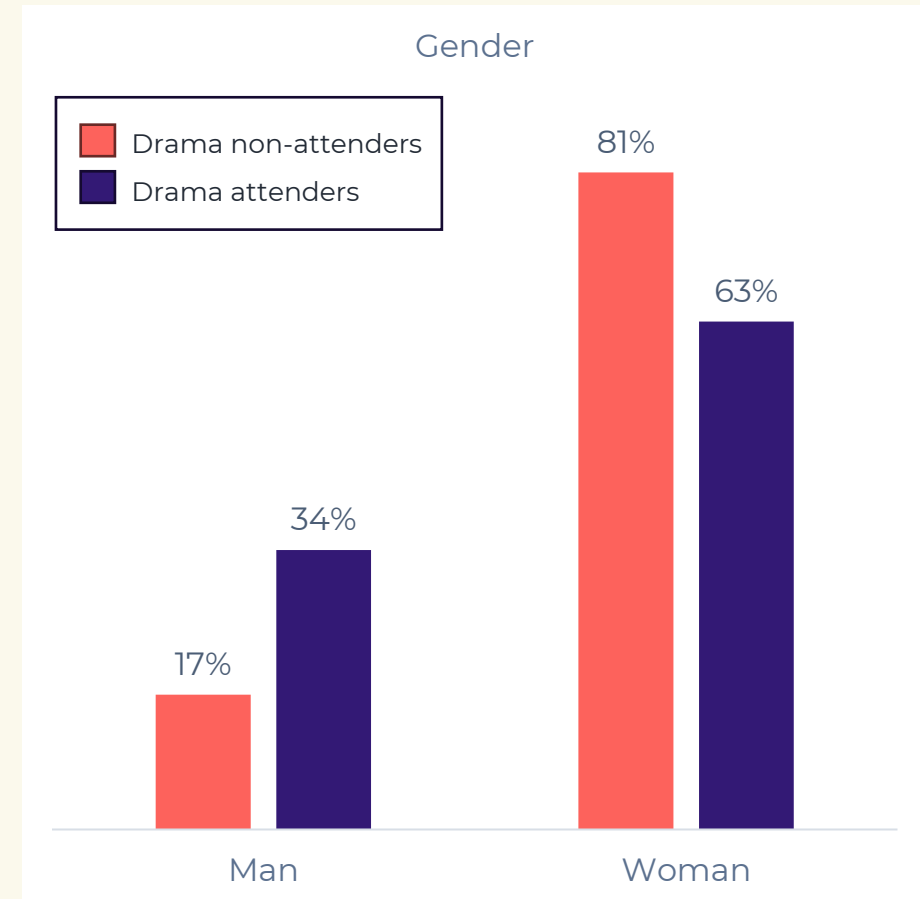
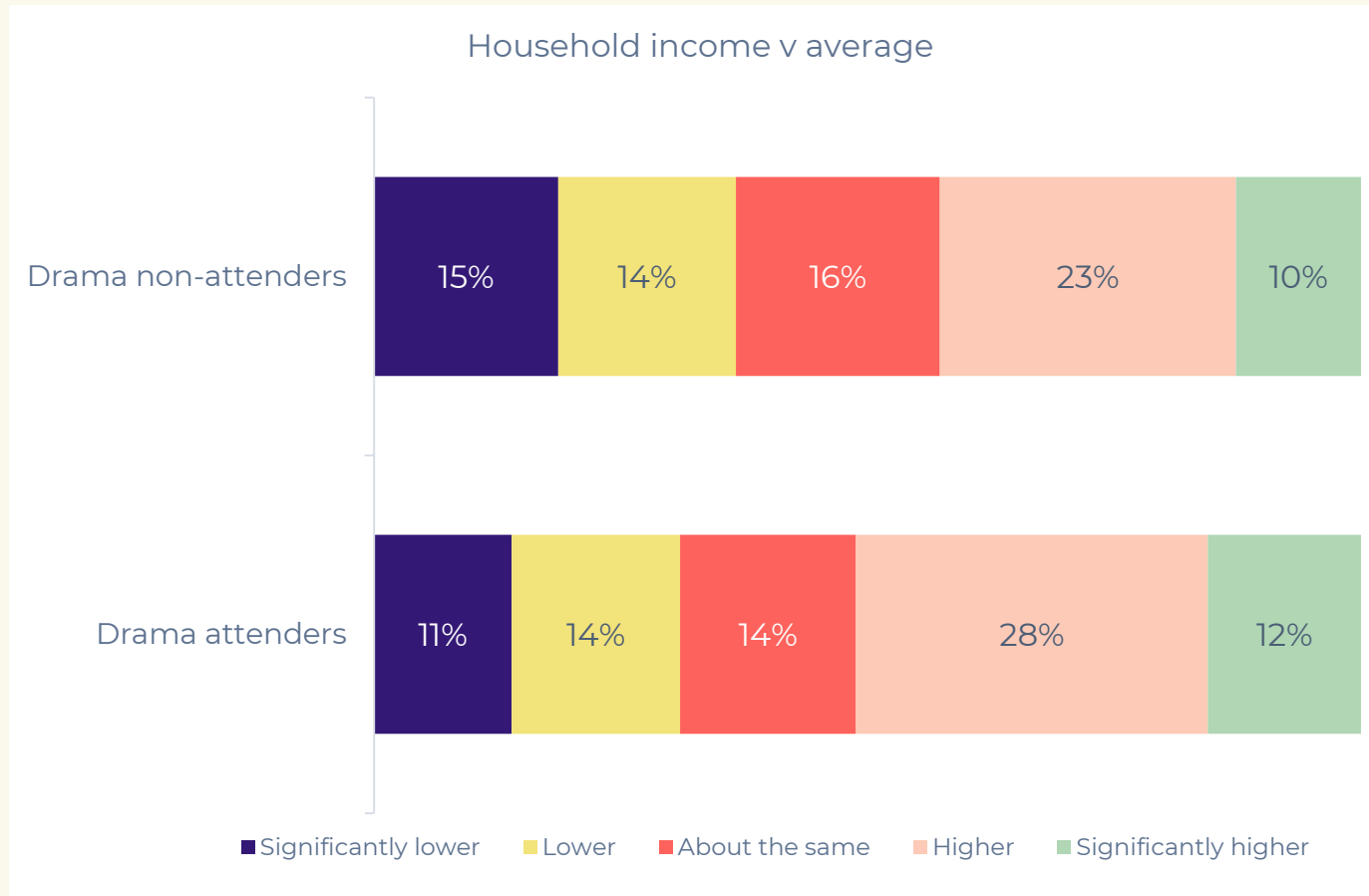


Drama non-attenders skew slightly younger, are more likely to be disabled and are twice as likely to have younger children



There was a marked difference in the gender of respondents with twice as many men in the drama attenders, while non-drama skewed lower income

Overall, 0.6% of respondents identified as non-binary, preferred to state their own gender or stated their gender was not listed

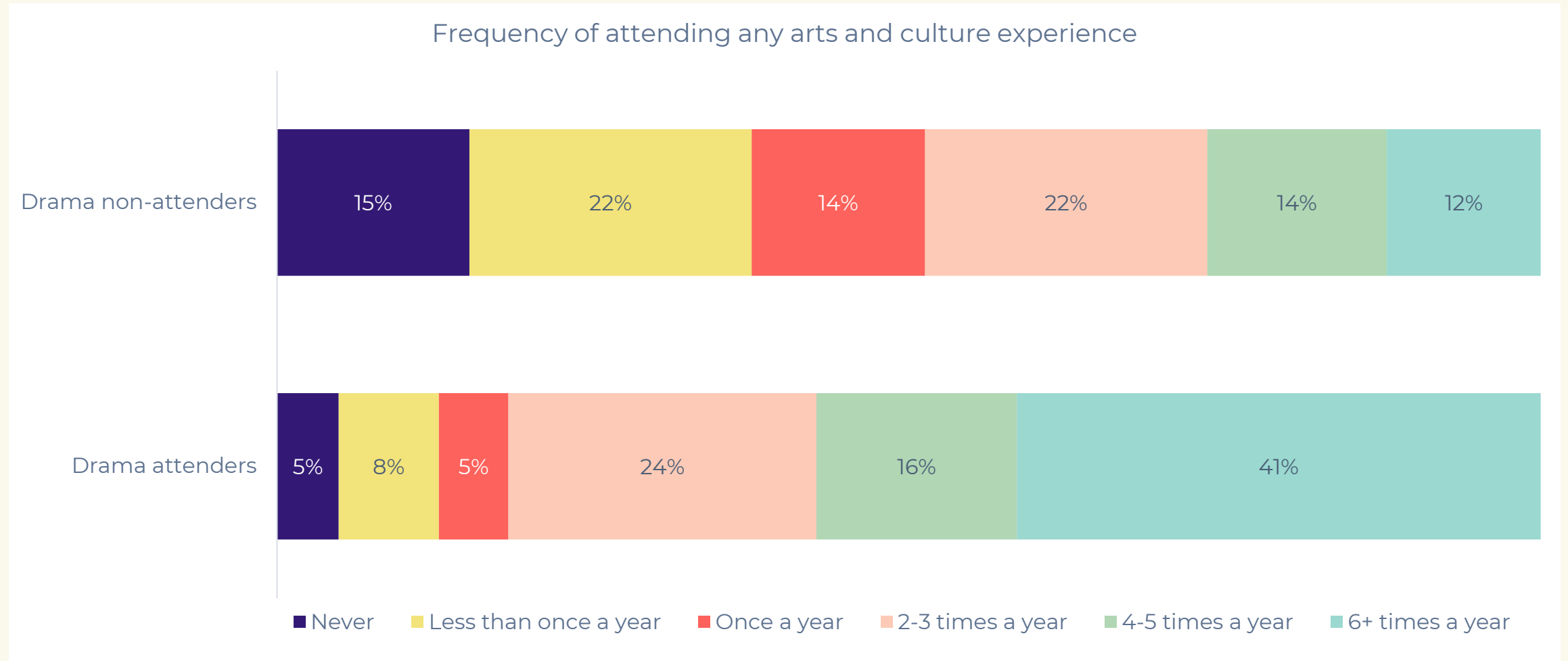


Audience Behaviour

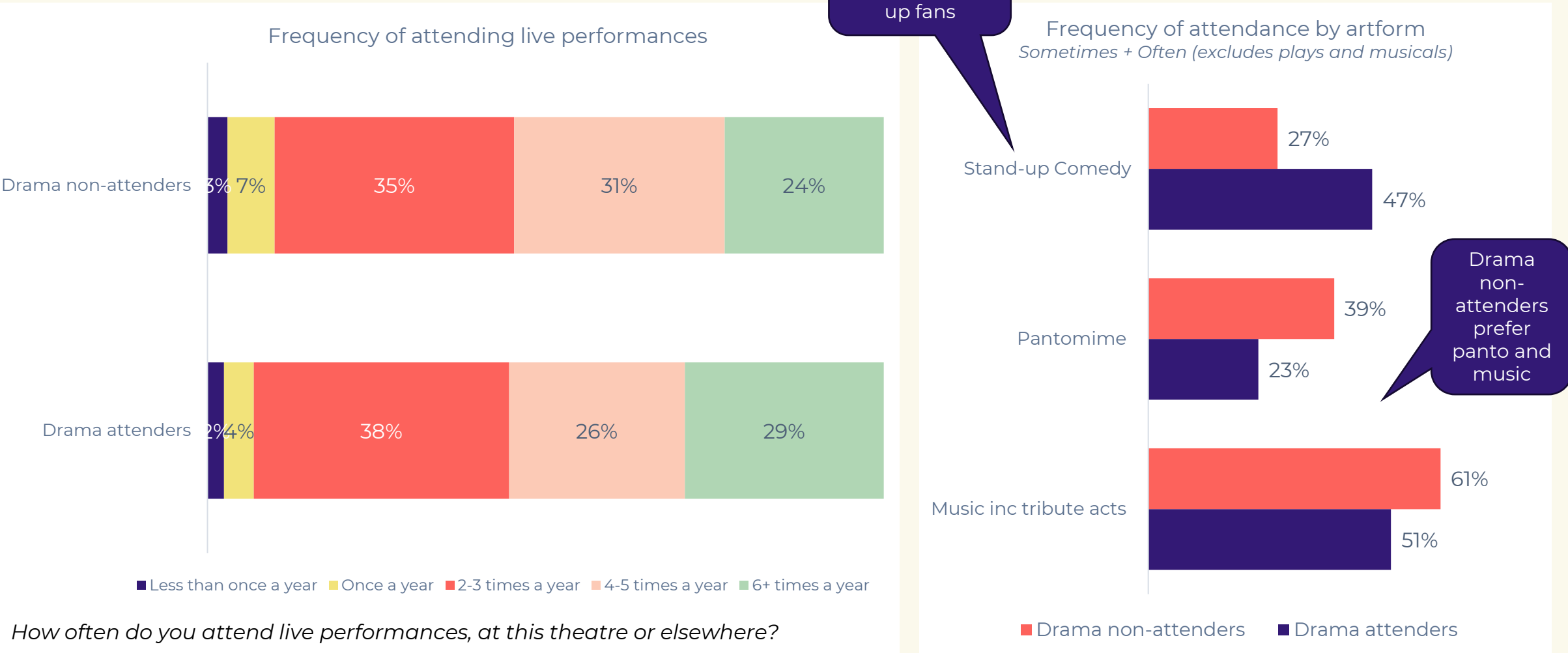
Drama attenders compared with non-attenders



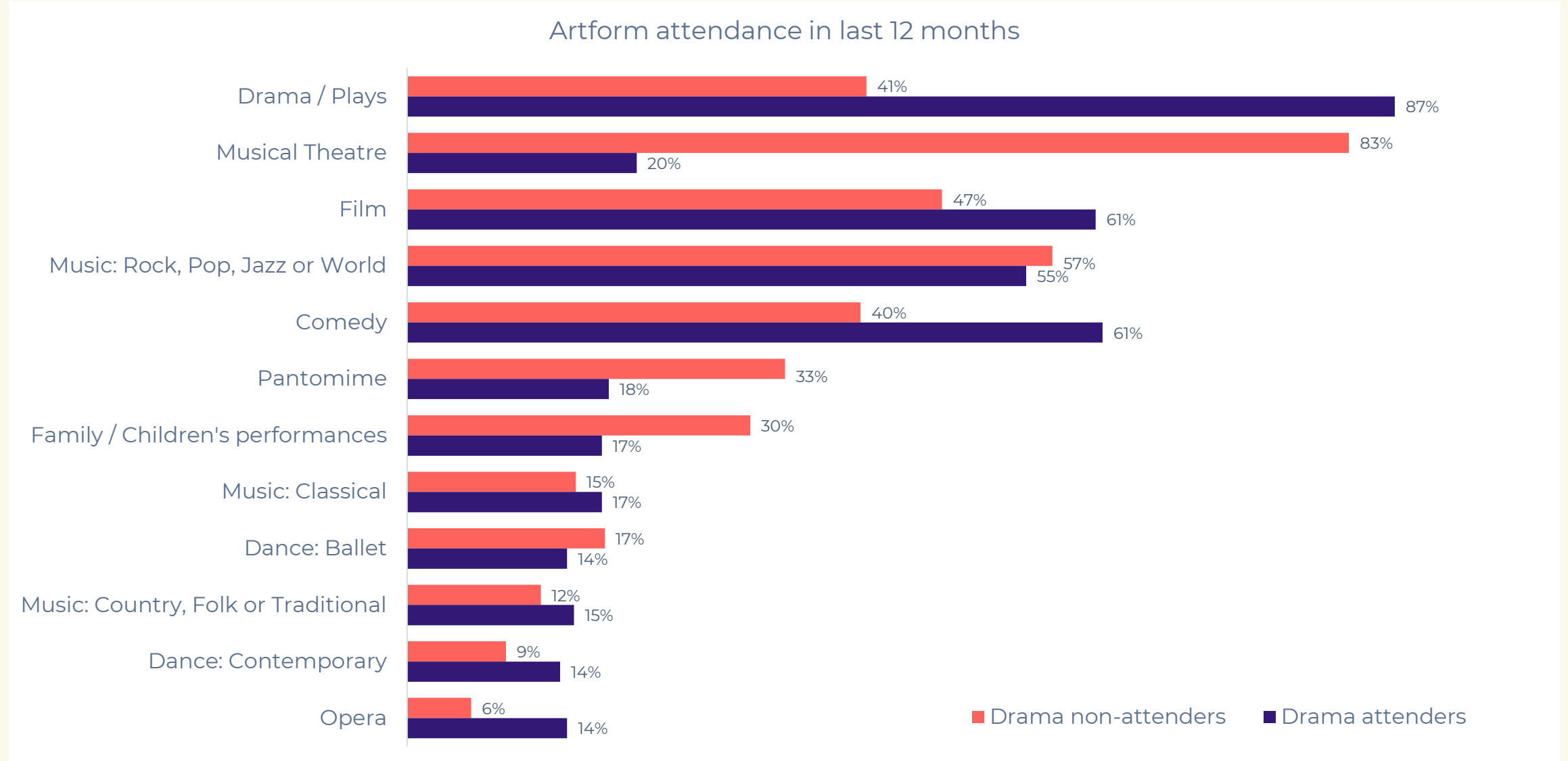
Drama attenders were very arts-engaged in comparison to drama non-attenders



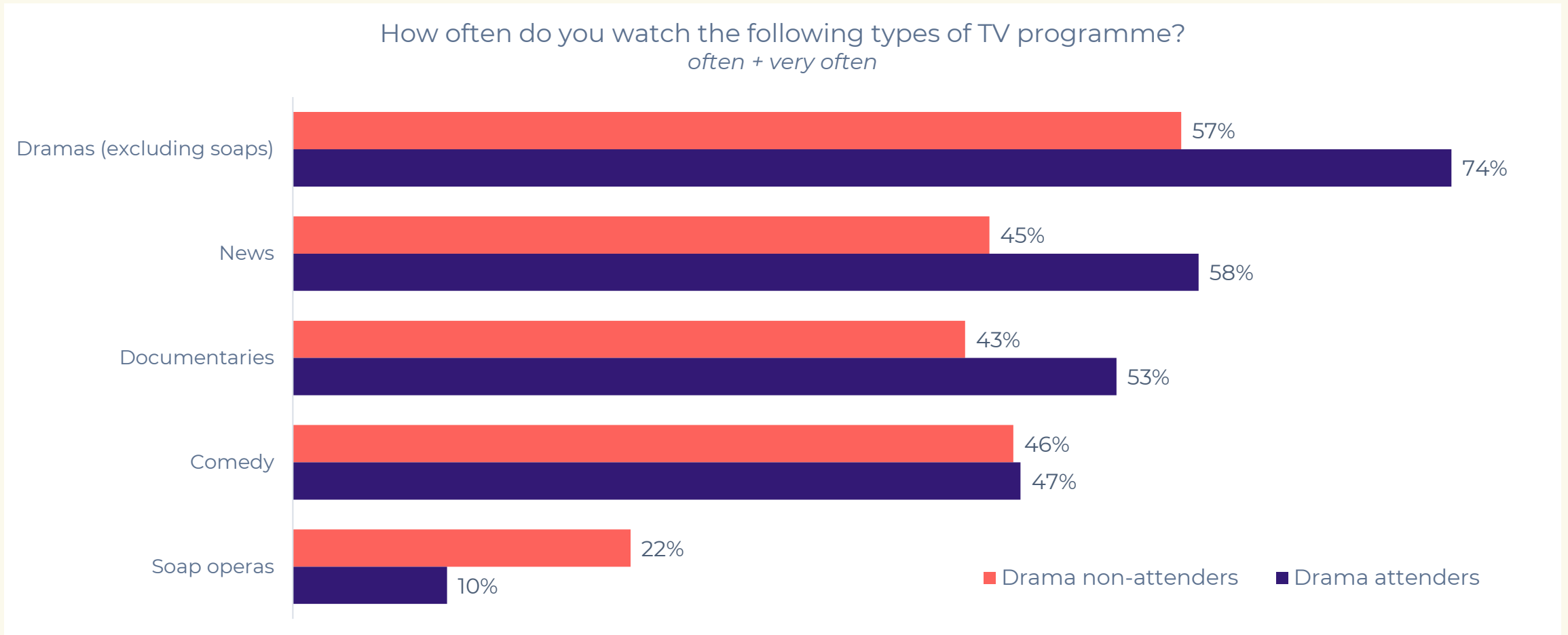
However, frequency of *live performance* attendance was surprisingly similar



Drama attenders were more likely to have attended film, comedy, dance and opera

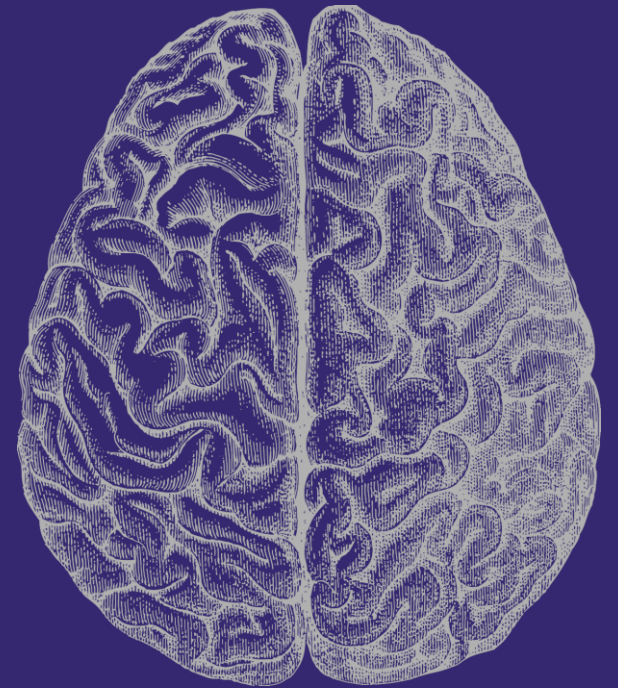


Drama attenders were also more likely to watch TV drama, as well as news and documentaries, where non-attenders were twice as likely to watch soaps



Attitude and perceptions

How audiences view drama



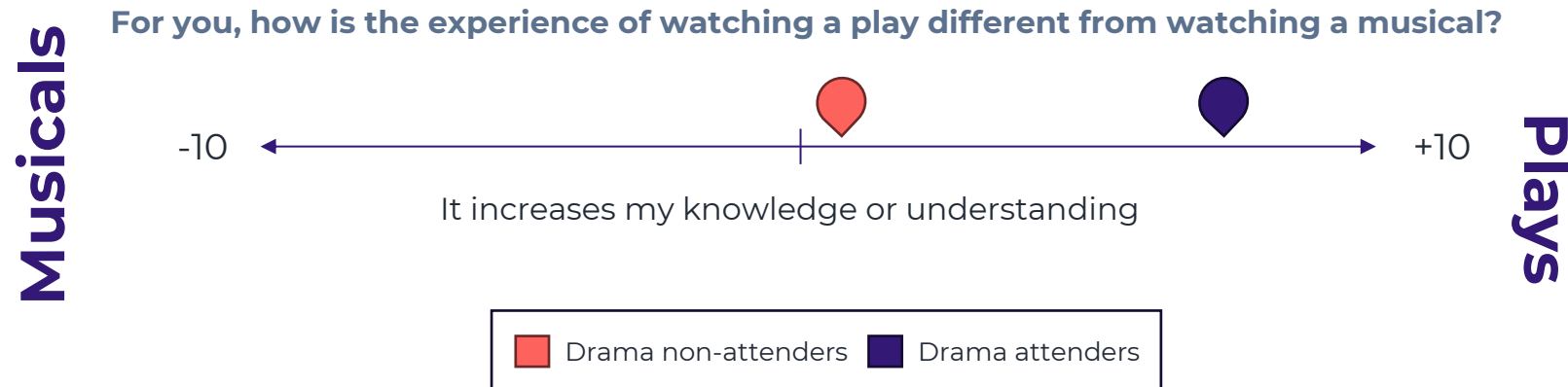
To better understand attitudes to drama more broadly, we explored comparisons with TV drama and with musicals

Comparing musicals and plays, and comparing TV and theatre

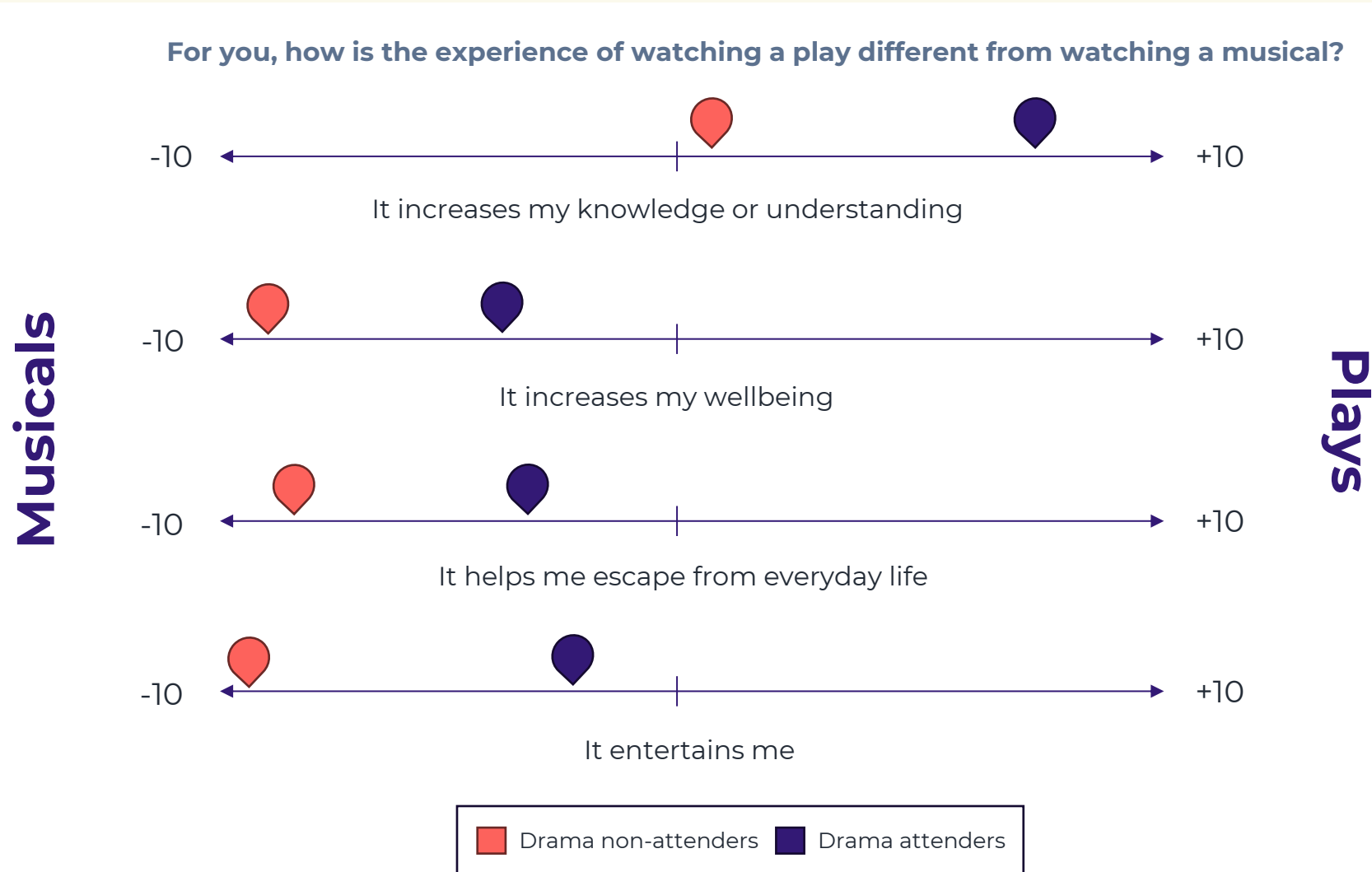
For the following questions, respondents had to position a marker on a slider to show whether they felt the statement more closely matched their experience of watching plays or watching musicals (or experiences in the theatre or watching TV) and to what extent.

In the example below, the markers show that drama attenders felt that watching a play increased their knowledge or understanding significantly more than watching a musical; drama non-attenders felt that attending both plays and musicals increased their knowledge or understanding about the same amount.

It is important to note that drama non-attenders were more likely to place markers on the left of the scale as they rarely or never attend plays, but their *perceptions* of the differences in attending both are important to understand.



Escapism was an important reason for attending, with musicals particularly seen as escapism and entertainment, increasing wellbeing



"Some productions are just meant to be fun. You just go there you forget your things. You just have fun. There is no need to think about the world or philosophy after every show."
 (Drama attender – about attending both drama and musicals)

"It's a really nice bit of escapism for me. So I love having that just time of a week that I can have two three hours away."
 (Drama attender – about attending both drama and musicals)

Plays are seen as more of a cerebral experience which helps change your perspective and makes you think differently

For you, how is the experience of watching a play different from watching a musical?

Musicals

Plays

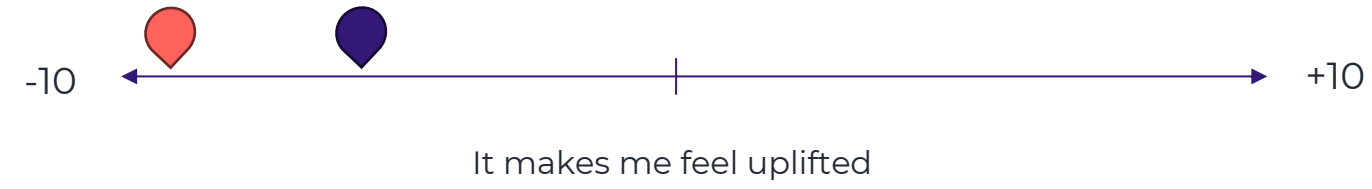


Connection is a more common benefit to both plays and musicals

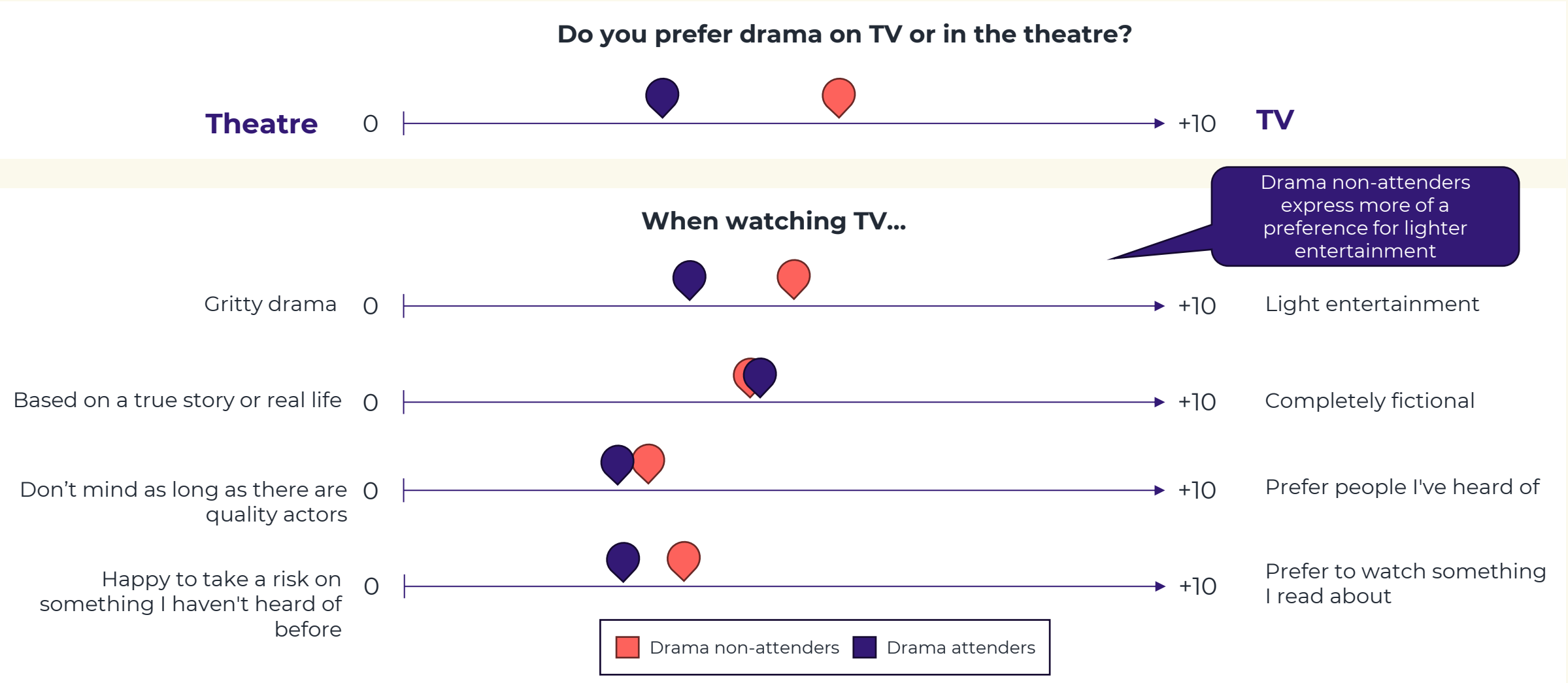
For you, how is the experience of watching a play different from watching a musical?

Musicals

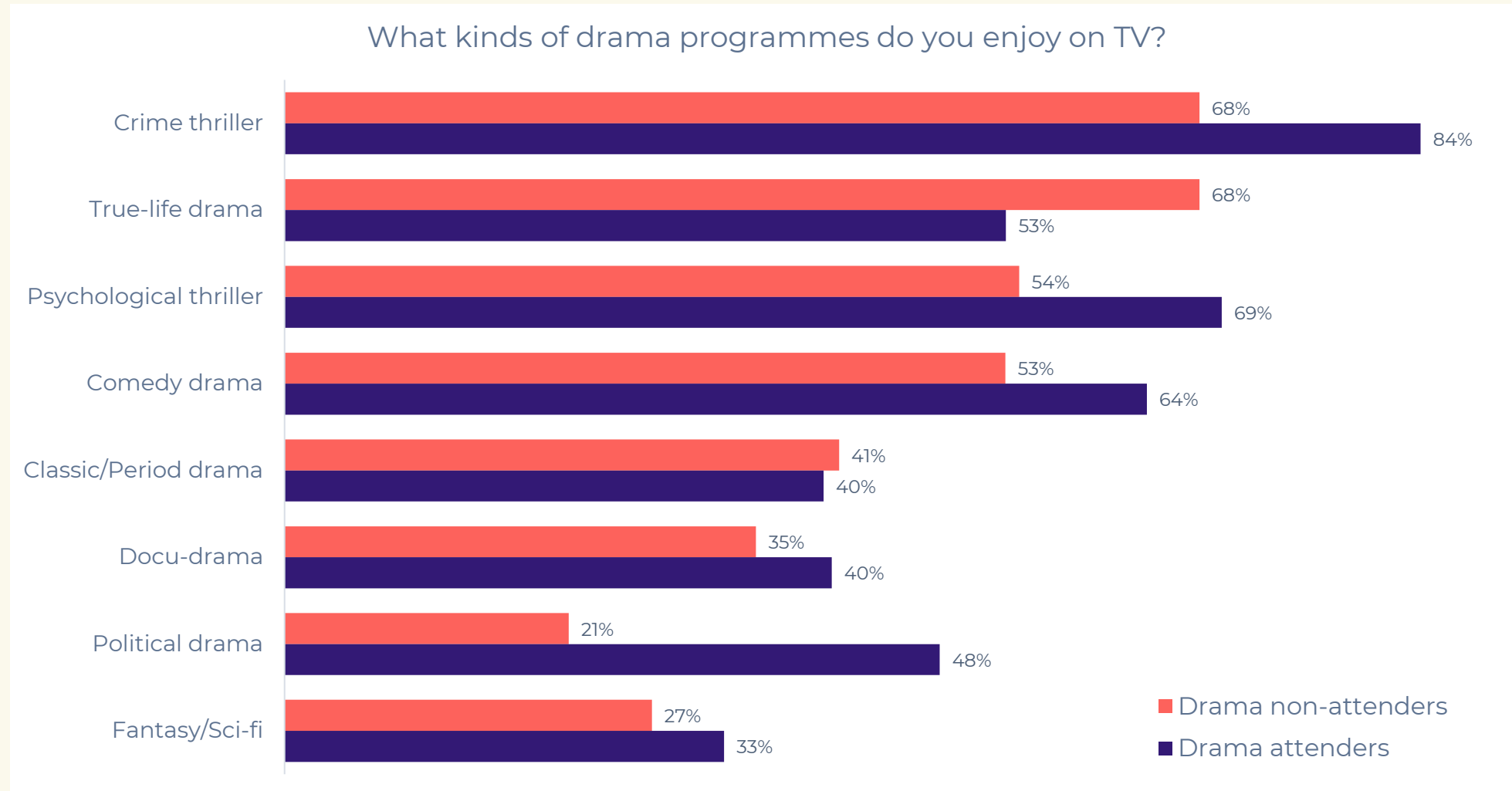
Plays



Drama non-attenders prefer watching drama on TV than live, but preferences in TV drama genre differ relatively little between audience groups

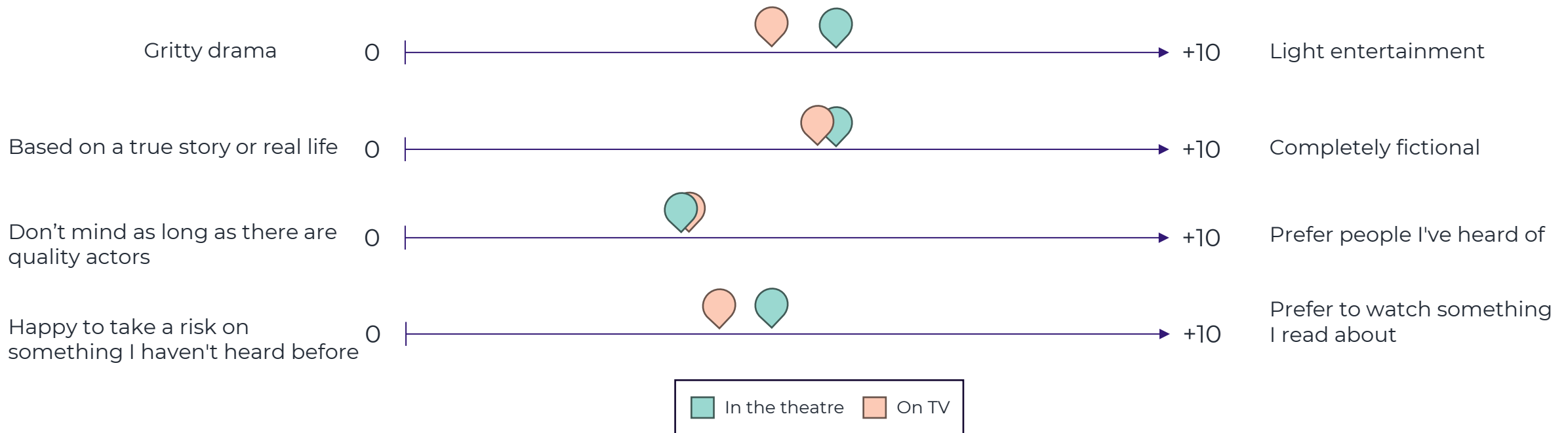


On TV, crime drama, thrillers and political dramas were preferred by drama attenders, whereas non-attenders particularly liked true-life drama



Theatre is seen slightly more for light entertainment than TV and audiences want slightly more assurance/familiarity before attending theatre

Watching on TV compared to in the theatre

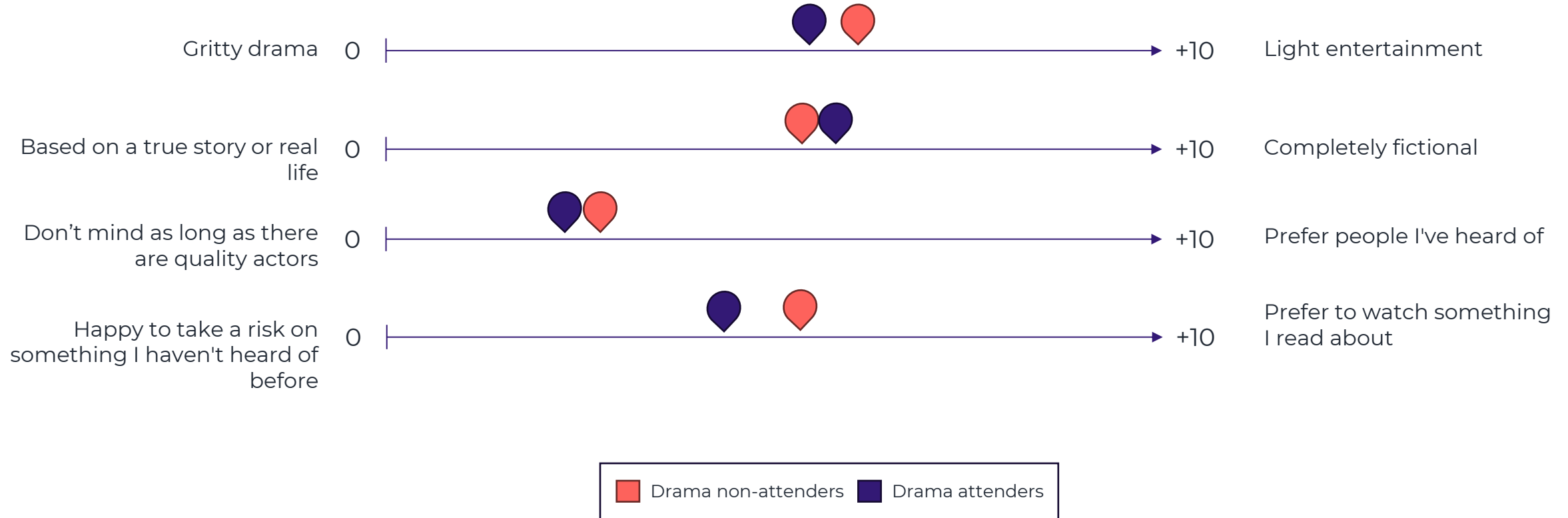


"I'd say I enjoy [TV and theatre] in equal measure really. I think maybe it's just my attention span. I find that I can get really absorbed into a film, depend on what that film is, of course."
(Drama non-attender)

"I have short span of attention [sic]. I really need something like murder mysteries or something."
(Drama non-attender)

Drama genre preferences in theatre are also similar between audience groups

When watching a play in the theatre, I prefer...



"I do like the Alan Ayckbourne plays, the tried and true... light drama. They're not serious plays and they're not comedy as such...compared to the darker, gritty newer plays...you just want to escape."
(Drama non-attender)

"I also tend to avoid the serious depressing looking modern ones about hard hitting topics."
(Drama non-attender)

Almost all focus group respondents saw the value in the live experience: the collective environment, increased emotional impact and immersion, the value of the performers' craft and the element of unpredictability (or even jeopardy)

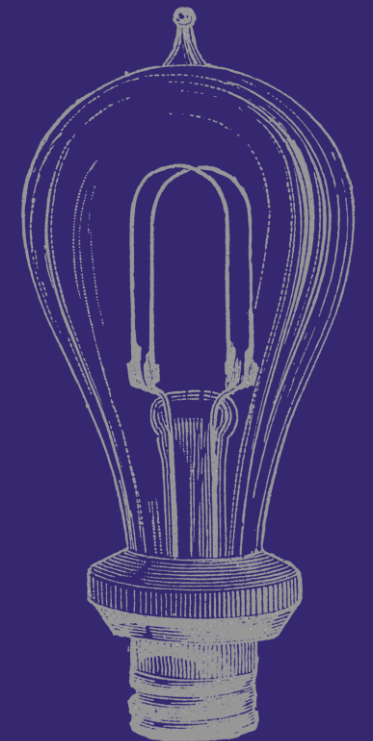
- "You just *feel more*... when you see them live, having that audience, there's an *extra energy*. [Comparing live and TV stand-up] I don't think I've ever laughed so hard... There's just more of an *emotional connection*" (Drama attender)
- "It's the difference between going to a concert or listening 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)
- "It's a live production in the moment, in the cinema you know it was reshot, high budget, made to perfection. *You never know* what is the set going to be, or the audience as well, what atmosphere will there be? You *appreciate the effort* a lot more." (Drama non-attender)
- "I think one of the things that I love so much about there is that these people are putting on these shows sometimes, seven to eight, nine times a week and every single time to bring the same emotion and they're just showing these *amazing ranges of emotions*; and I think in the theatre there's *so many things physical and mental that you experience*" (Drama attender)
- "One of the big things is the fact that when you're in the theatre, *you've not got any other distractions*... I think the fact that you're *immersed*... I feel like you probably get more drawn into it when it's something you're seeing on the stage than on the TV" (Drama non-attender)
- "I do like that you're getting it all in one go, there's no distractions, there's no going on your phone during it, it's *full focus*." (Drama non-attender)
- "I think with theatre it's a live production. *Mistakes might happen*, it's always a bit different, it's in the moment... You never really know." (Drama attender)

The benefits of TV, in contrast, were the convenience and personal flexibility it offered

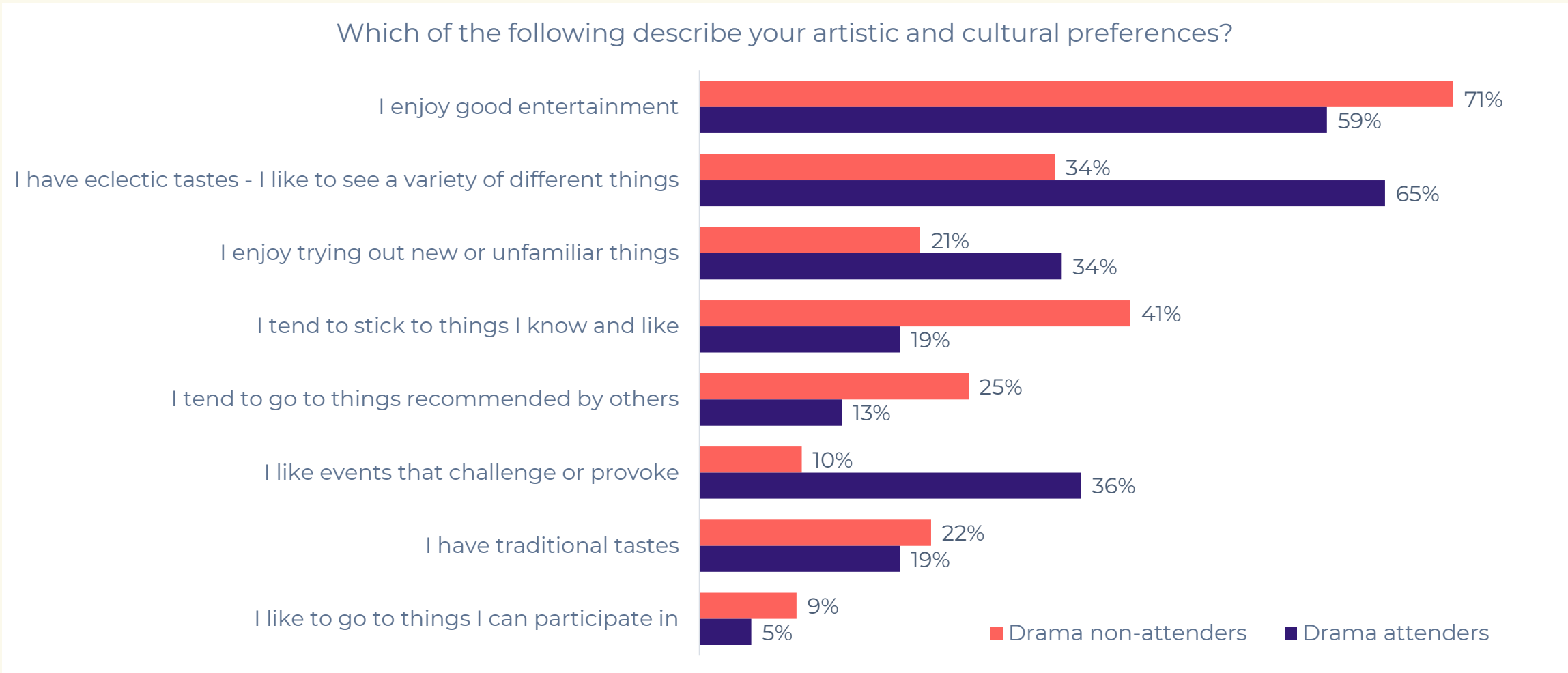
- Attention span concerns and the sense of no escape in the theatre were elements where people favoured TV
 - “[If there is a bit of] boring dialogue, I can skip through it, that binge watching kind of thing which you can do, which you can't do when you're in a real show. You *can't fast forward* anything you have to sit it out... Sometimes on the screen thing you get more of an atmosphere, which sounds weird... I'm at home. It's a more *comfortable environment*.” (Lapsed drama attender)
- Some people had had negative experiences in the theatre which put them off
 - “Sometimes yeah the audience can be amazing and really make it. I don't know if I just get unlucky but I always seem to get either someone very drunk or very loudly eating near me” (Drama non-attender)

Motivations and preferences

What audiences like to see and what triggers their decisions



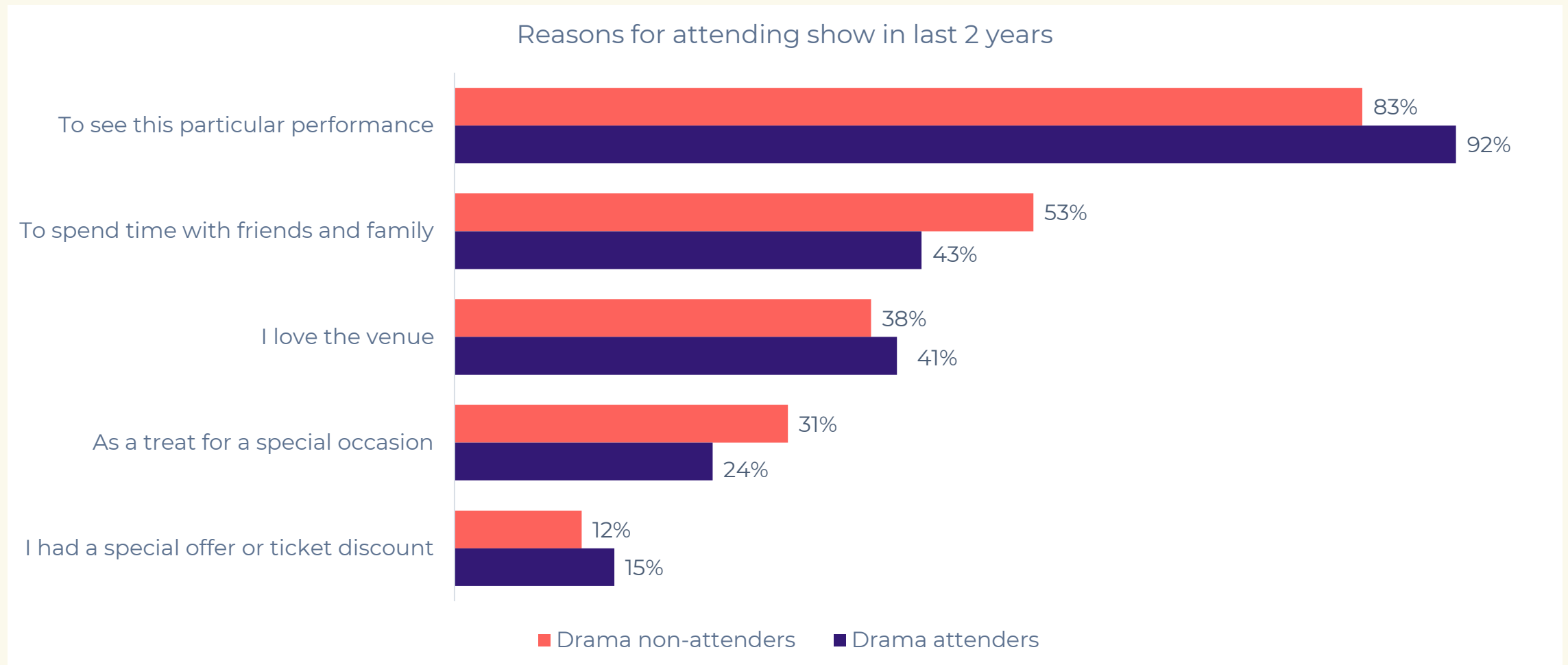
Drama non-attenders tend to have less adventurous tastes and enjoy familiar things, whereas attenders enjoy challenge and variety



The adventurous attender needs less reassurance and is more confident they will have a good time whatever (or is happy to sacrifice their time), whereas those preferring familiarity need points of connection

- *"It's less of a moral, supporting the theatre thing for me, but more just about having that period [during the pandemic] where you couldn't go out and do anything it's made me appreciate more... It used to be I'd see there was a big opportunity cost, like, if I go to see a play and it's a bit crap, I'd be like, oh well that was a waste whereas now I'm like at least it's something different, a different experience."* (Drama attender)
- *"I do like taking a punt if something catches my eye"* (Drama attender)
- *"I'm going to see Paranormal Activity at Leeds Playhouse just because I know the film so it's interesting one to see; I went to see a play The Signalman which is based on a Dickens ghost story recently in the Wakefield Theatre coz it's like, okay, it's Dickens I know what that is, so if there's some kind of string of connection, a familiarity, even if I've not actually seen it before or heard specifically about the production I'll go for it, but I tend not to go for completely random stuff I've got no connection to whatsoever."* (Drama non-attender)

Across all audiences, the main reason to go and see a show was 'to see this particular performance', but drama non-attenders were more driven by social reasons and special occasions¹



1. Indigo's Hot Topic [Tomorrow's Audience](#) in 2023/4 also found that social/special occasions were a key driver of first-time attendance

Additional motivations included support for a venue as well as identifying as a “theatre person” (whether for drama or for musicals)

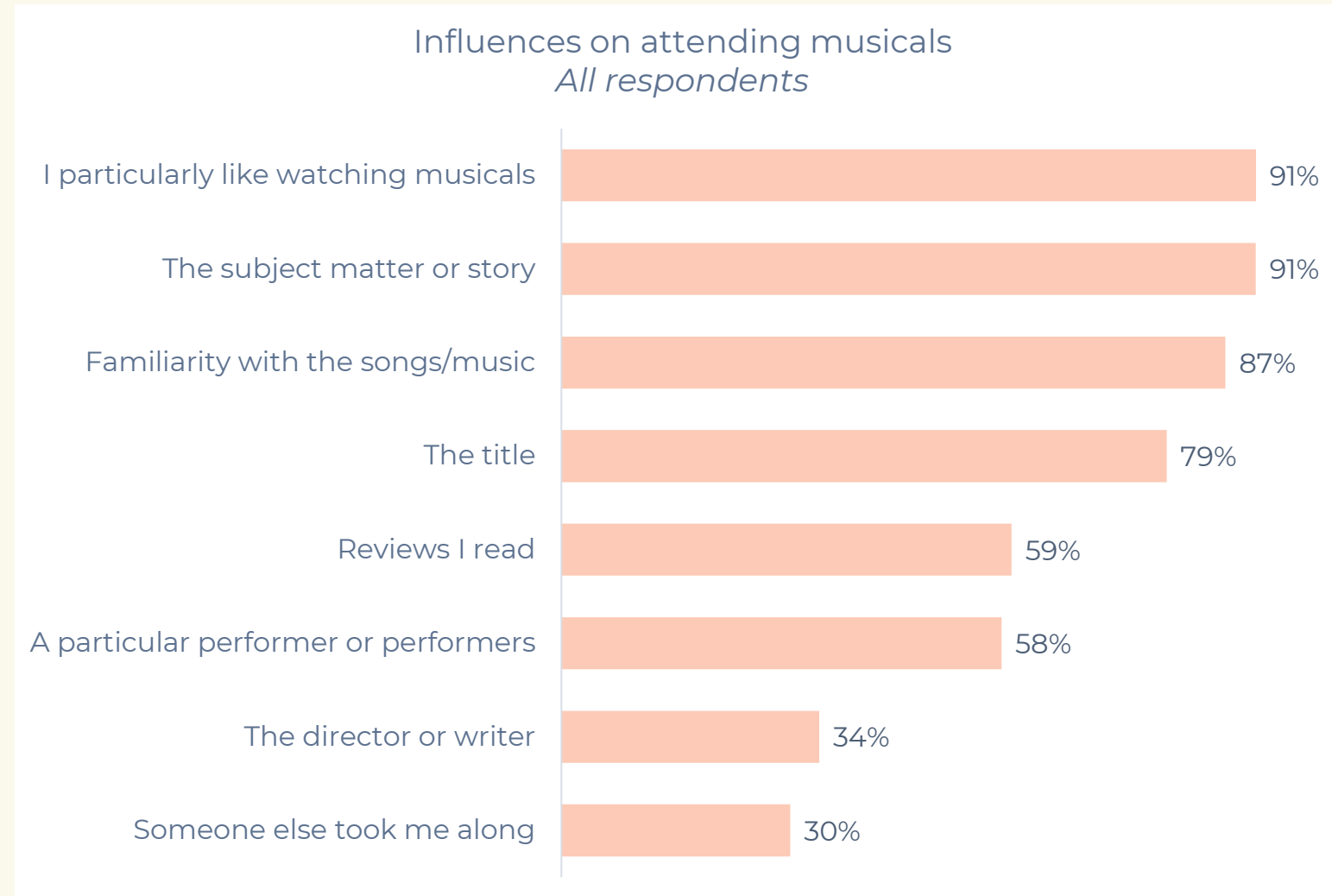
“Well I’d already visited that theatre before to see other kind of new musicals and obviously because they’re independent they do struggle a bit, so I just try and go and see everything there as much as possible. But I think this one did quite intrigue me and I think I’ve got to this point in my life now where I’m like “ooh, I do wanna be part of, like, new things and experience new plays and theatre so I can be like talk of the town and be like “guys you should go and see this new thing that I’ve seen”.” (Drama attender)

“I’ve got a bit of reputation now at work as the theatre girl. So ‘What should we go and see? [Name] knows what’s on, or [Name] knows what’s good.” (Drama non-attender)

“Before [the pandemic] I used to go to maybe ten a year touring productions. And I think I just say if I’m interested in it, I will go and see it and I think it is a mix of I want to support the theatre and make sure that it continues to thrive... I think it’s one of the things that I just love it’s part of me and I couldn’t imagine my life without it. So I think now that I have this opinion that I just want to experience everything. I think that’s why I’ve started going to more plays because I want to really broaden my horizons.”

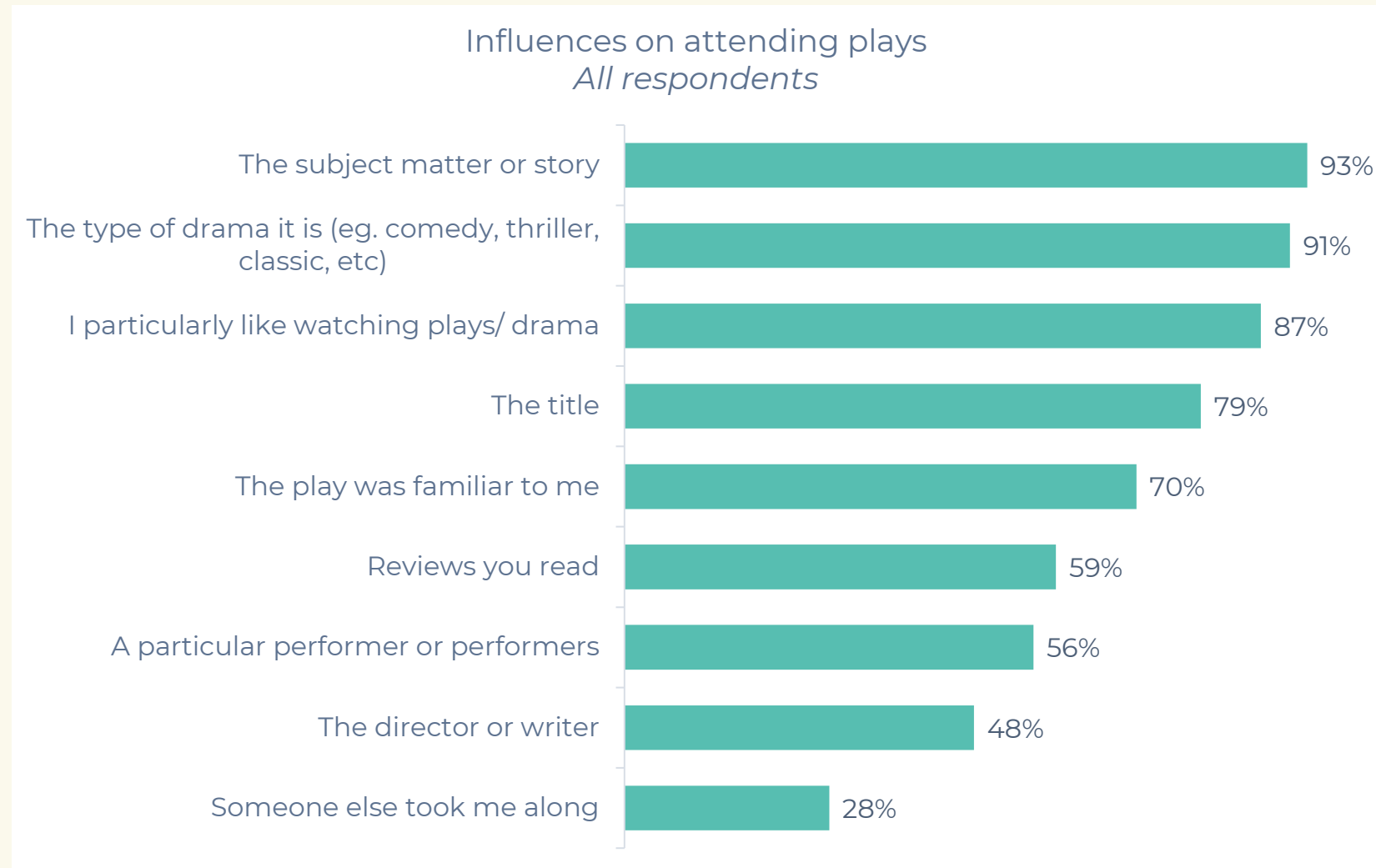
(Drama attender)

Familiarity was an important influence for all attenders, and was an even greater influence on musicals (in part because the music is often available for listening to in advance)



"I'll mostly just see musicals and whatever, like, famous comes around because I don't think there's much famous plays or musicals that usually go that far up north"
(Drama non-attender)

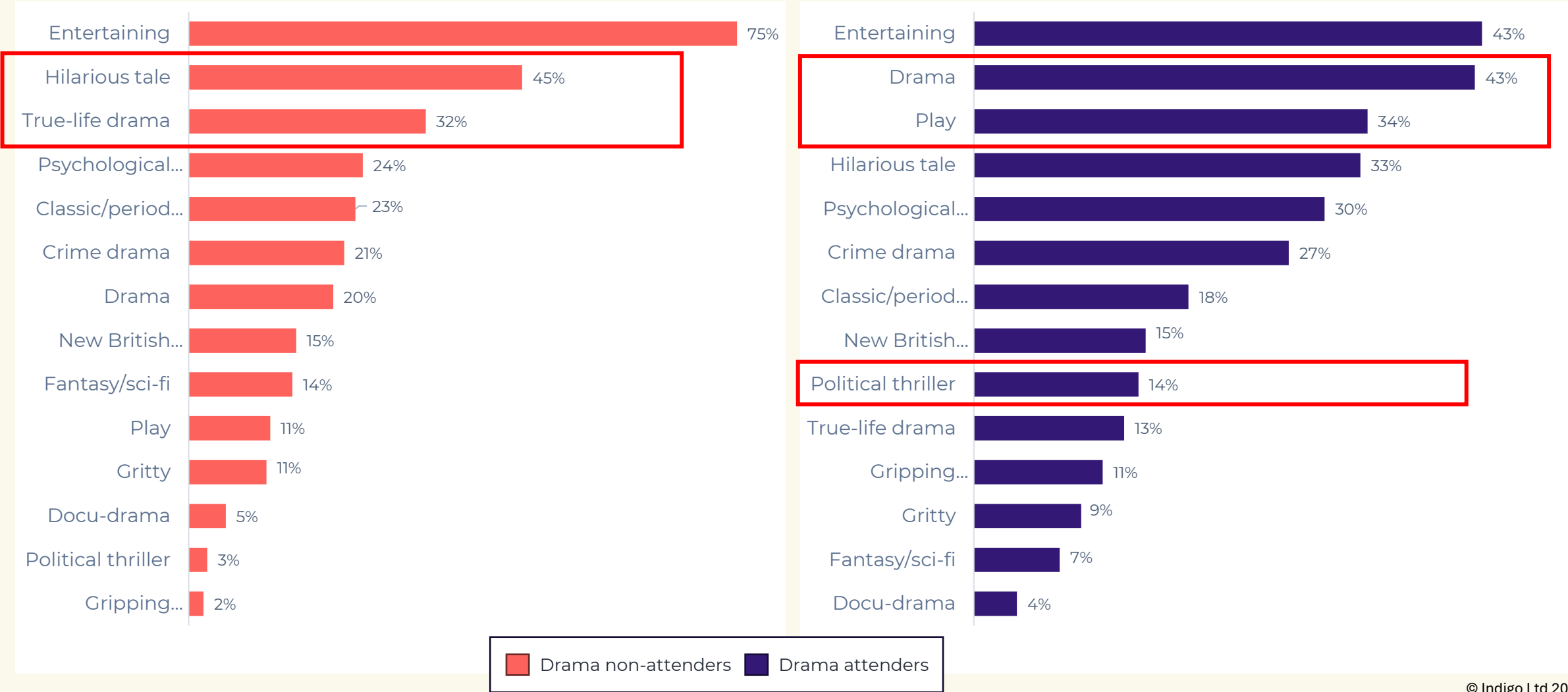
For plays, the *type* of play was a very important influence



"If it's not something I heard of before, I will look at the genre, so mystery and horror is something I like. There was one that I hadn't heard of, 2:22 that came and it looked a bit scary and interesting, so I was like why not just go for it."
(Emerging drama attender)

When looking at terminology, this pattern was seen again: those already attending drama are comfortable with drama/play words, whereas non-attenders responded more the *type* of drama

Which of the following descriptors are most appealing for a play at your local theatre?



The appeal of relevant true-life stories was popular even with those who considered themselves “theatre haters”

- *“Can I just say that the idea of local history is incredible and I would definitely go if that was put on. I have never thought about it.”* (Drama non-attender)
- *“I think that would be also a really good way of introducing other countries or the cultures history from different places”* (Drama attender)
- *“But I would probably want to have a fictional ending to most of histories stories because most of the endings suck in real life.”* (Drama non-attender)
- Relevance still matters, though:
 - *“If it was someone's life that I'm interested in, definitely. Likewise maybe if it was not about the sort of person that I'd be interesting in finding out more about, then I wouldn't be bothered.”* (Drama attender)

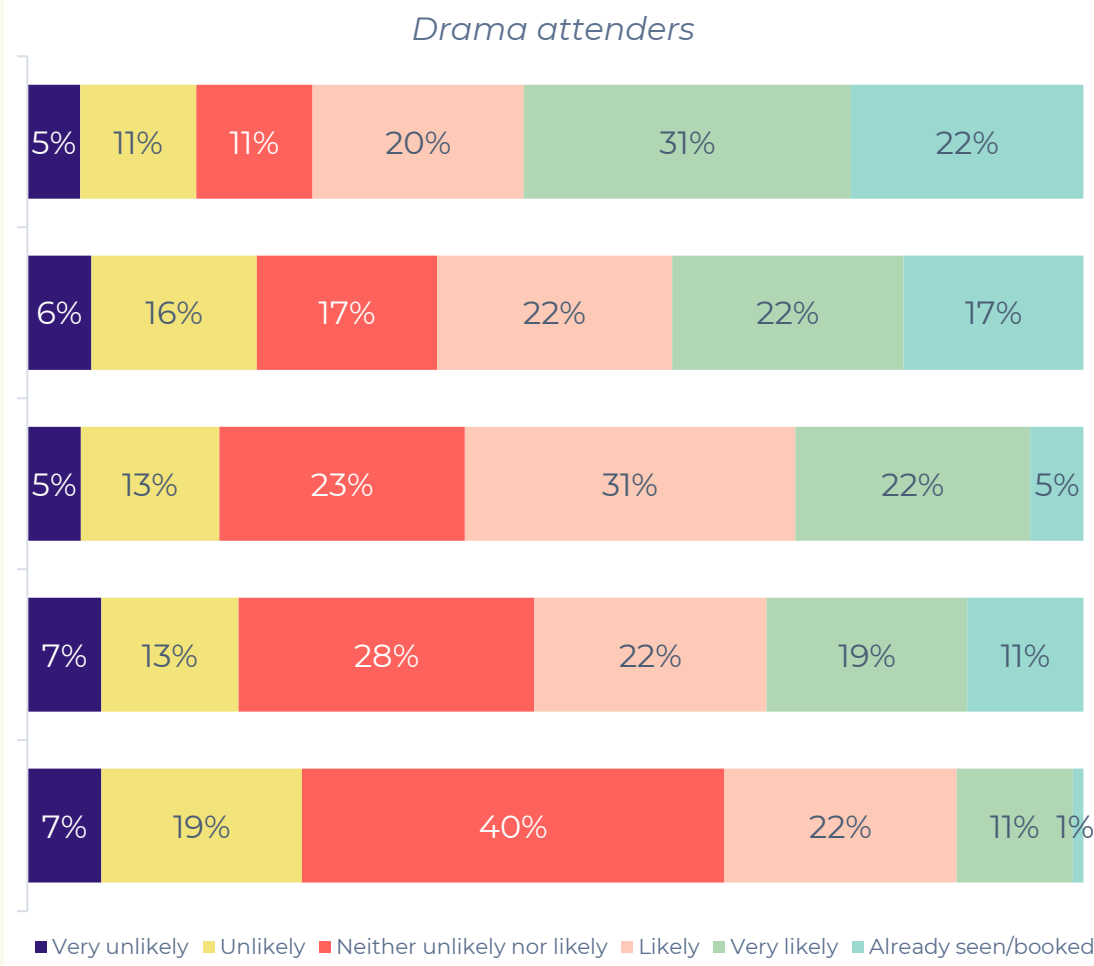
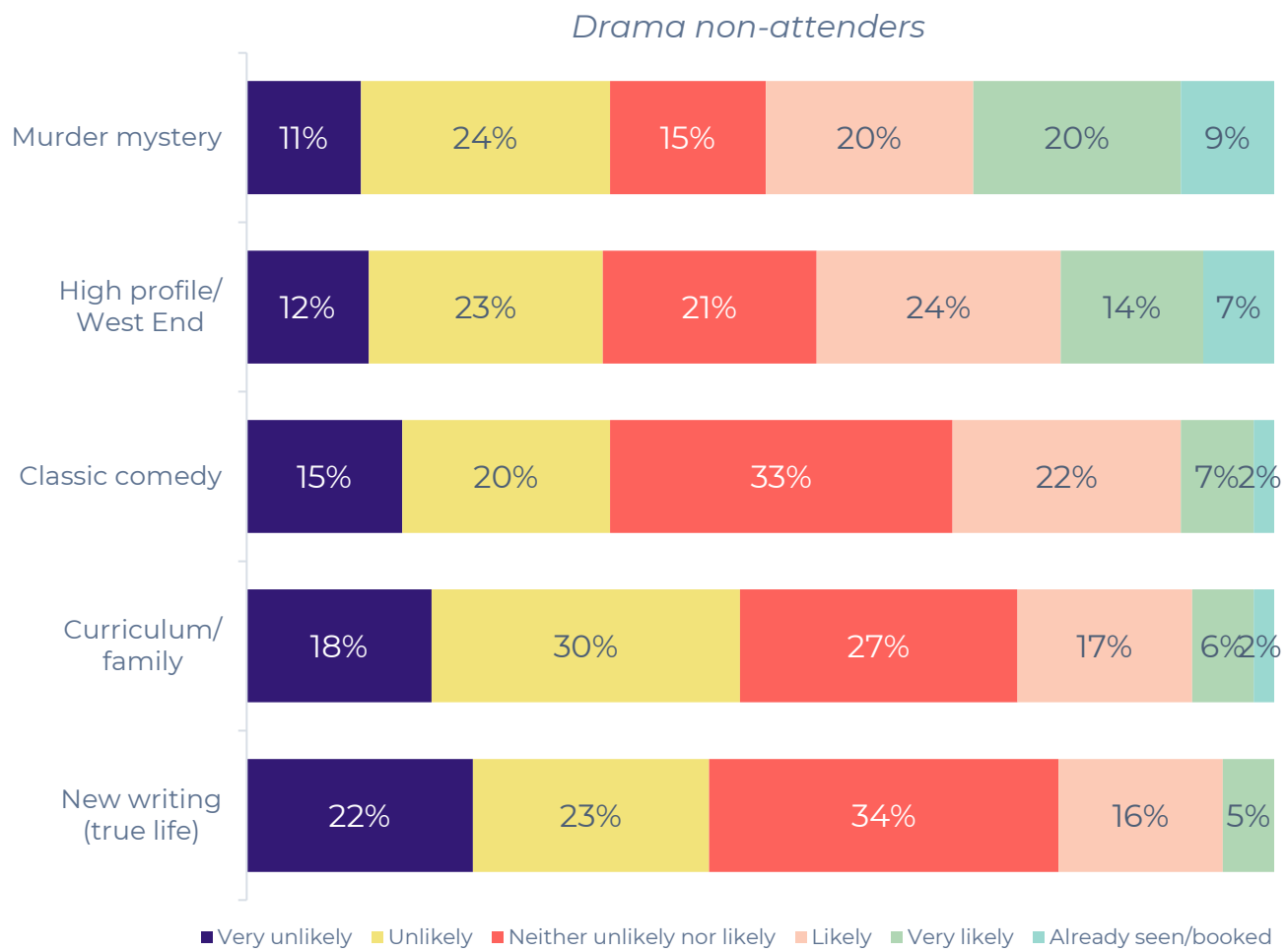
To find out more about these “types”, we compared likelihood of attending across various broad categories of plays to try and find those with most appeal

- Classic comedy show (famous writers)
 - The Importance of Being Earnest by Oscar Wilde
 - Relatively Speaking by Alan Ayckbourn
- New writing (true life)
 - The Mountaintop, about Martin Luther King
- Curriculum-related or family show
 - The Boy at the Back of the Class
 - An Inspector Calls
- Murder mystery (famous writer)
 - Murder on the Orient Express
 - Agatha Christie's the Mousetrap
- High profile/ West End
 - 2:22
 - Life of Pi

Respondents were shown one of each pair at random for each type so that responses weren't too skewed by one specific show

As we might expect, drama attenders tend to find all drama types more appealing than non-attenders, but the order of appeal was fairly consistent across audiences

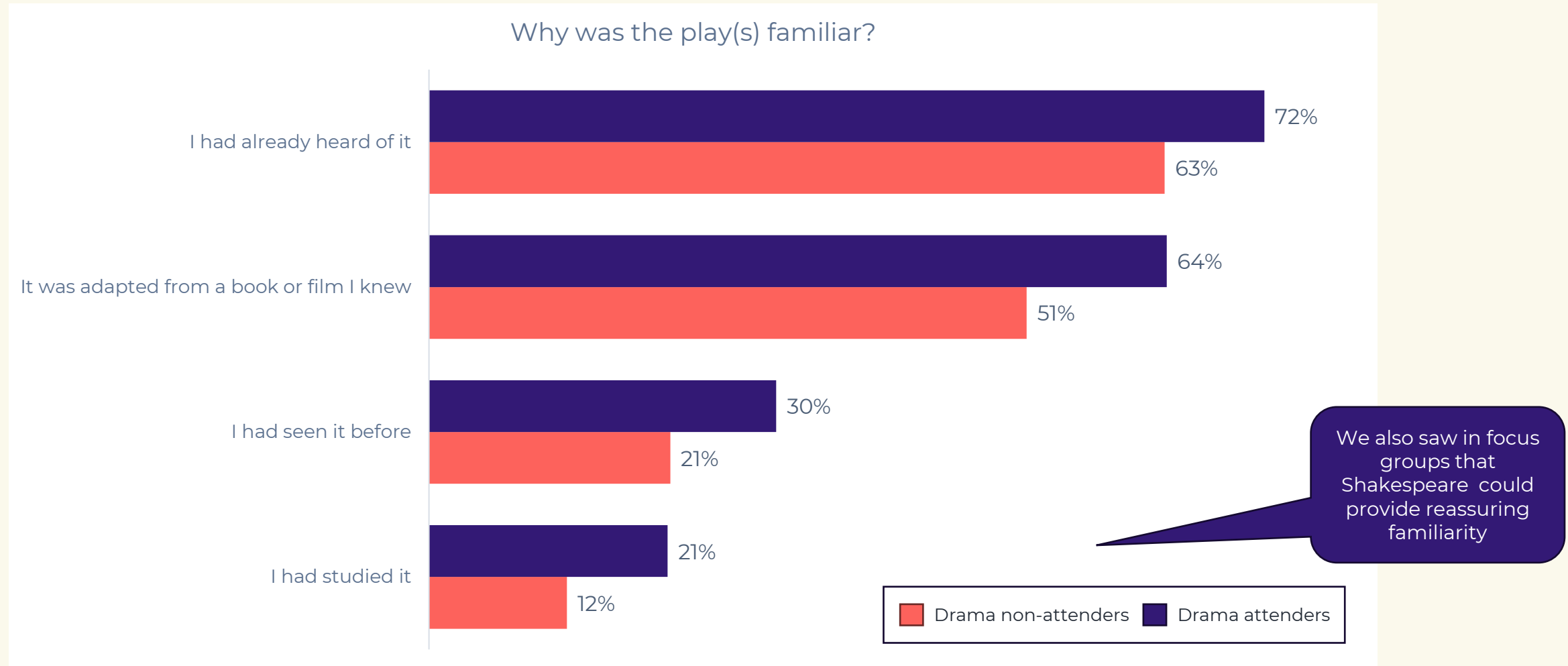
How likely would you be to book for the following show?



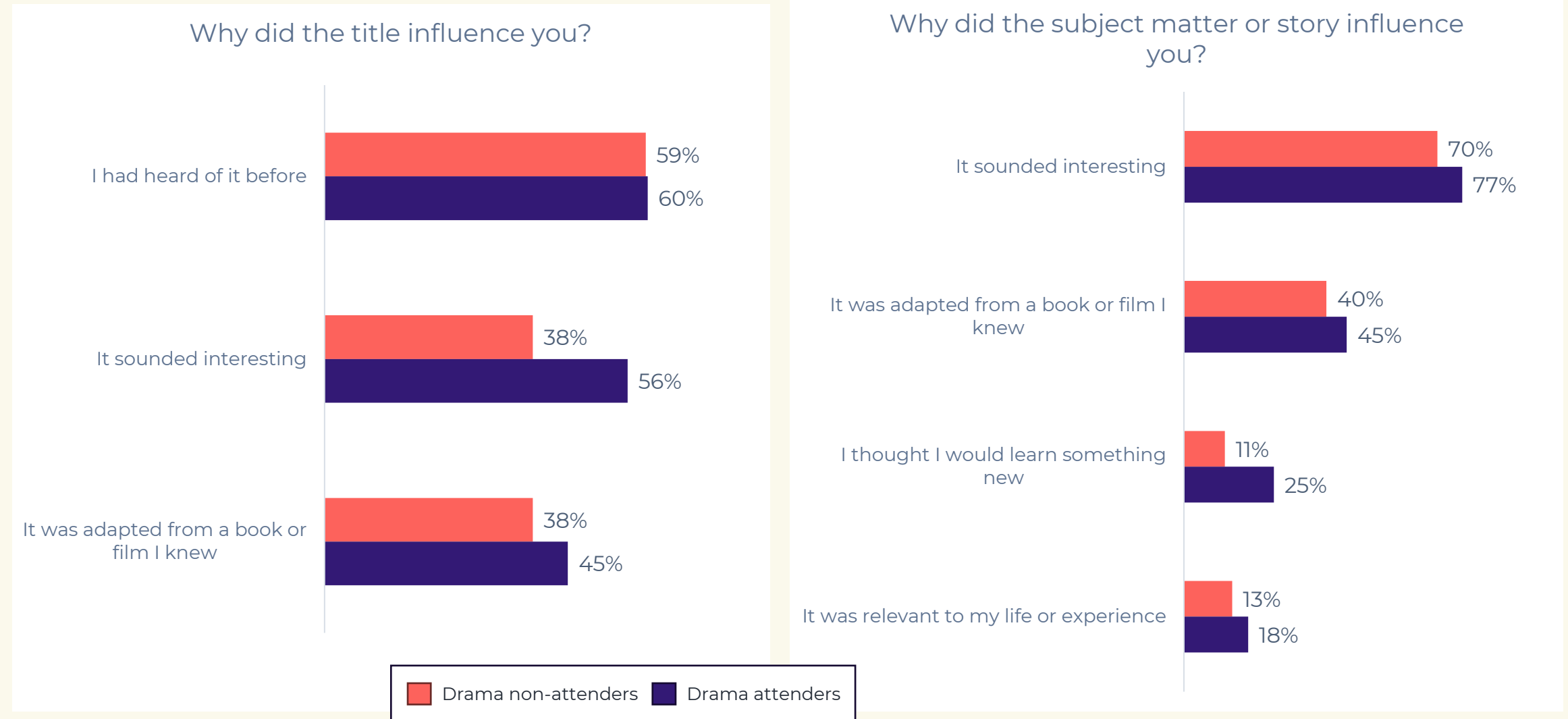
Reasons for these preferences reflected similar themes we saw through the rest of the research

- Top choice: murder mystery
 - Familiarity with Agatha Christie
 - Enjoyment of mystery genre
 - Familiarity with the title from films or books
 - Opportunity for a family or social outing
 - Reputation and legacy
- Second choice: West End endorsed high-profile show
 - Adaptation and interest in how it's done (Life of Pi)
 - Seen good reviews
 - Preference for ghost story genre (2:22)
 - Social experience

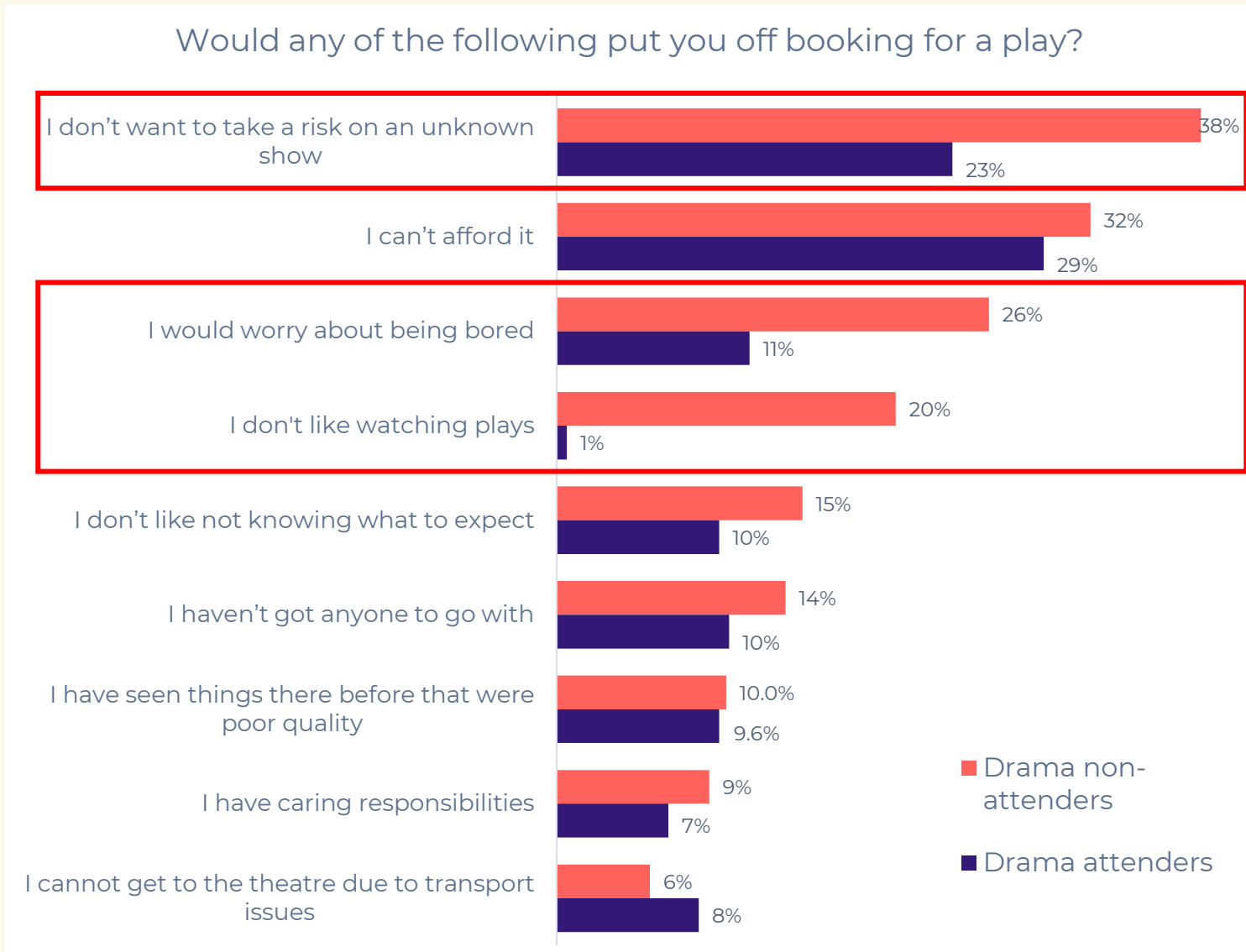
70% of all audiences said familiarity was important to their attendance of a play, and this was driven by general awareness, links to film or book adaptations or even having seen it before (a third of drama attenders)



In line with their more adventurous approach, drama attenders tended to be more influenced by something “sounding interesting”, suggesting they feel more confident to give something a go (although familiarity still mattered)



Drama non-attenders can be put off booking for a play due to worrying about being bored, not wanting to take a risk on an unknown show and not liking watching plays in general



Drama non-attenders are more likely to worry about being bored or depressed by a play and wasting their time and money; musicals seem a safer bet for many

"I think I don't really enjoy watching really sad horrible things." (Drama non-attender)

"If it's sad, I won't see it." (Drama non-attender)

"If it sounds too depressing.. It might be interesting but, I dunno, I prefer the sort of escapism. If it's about sad people in a mining town in Thatcher's era...I'll probably avoid that." (Drama non-attender)

"I feel like with a musical even if it's not brilliant I'd still be like, you know what? It's been nice having a bit of a night out. Whereas a play, if I'm not enjoying it, I think I might get a bit bored." (Drama non-attender)

"I can't go and watch something serious. It has to be a laugh because I'm caring for my parents full time." (Lapsed drama attender)

These less frequent drama attenders talked a lot about the reassurance of a classic show or a familiar title because it reduced these risks of being bored or not enjoying themselves

- *“I just think about I love classics, what classics can I kind of add to my repertoire and why are they so famous?”* (Drama attender)
- *“I kind of find plays have very heavy subject matter, which I'm not quite eager to dedicate an amount of time to; 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)
- *“I'm still quite new to opera really so I only really go to the classic ones – the ones you hear the names all the time – just so I can acquaint myself with the genre”* (Drama non-attender)

Some people were happy to attend alone while for others, the lack of someone to go with was a big barrier

- Some respondents were more confident to attend alone as their main driver was to see the performance
 - *"I like to go by myself... I mean, I'm not gonna be talking to anyone while the play's on"* (Drama non-attender)
 - *"I often go to things on my own because I'm not gonna miss out just because no one else is interested"* (Drama attender)
- Another respondent attended musicals but was put off going to plays because he had no one to go with, although he would happily attend the cinema 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)
- One respondent had experienced single tickets being sold off last-minute
 - *"If you go on your own all the time, you can get cheap tickets, single seats that have been left and they really reduce them down 20 quid or something else ridiculous from what they were"* (Drama attender)
 - This was popular as respondents felt it validated solo attendance: *"I'd be a lot more likely to go for it - it's like taking the opportunity rather than planning it in advance."* (Drama non-attender)

We then explored a whole range of specific levers for triggering drama attendance

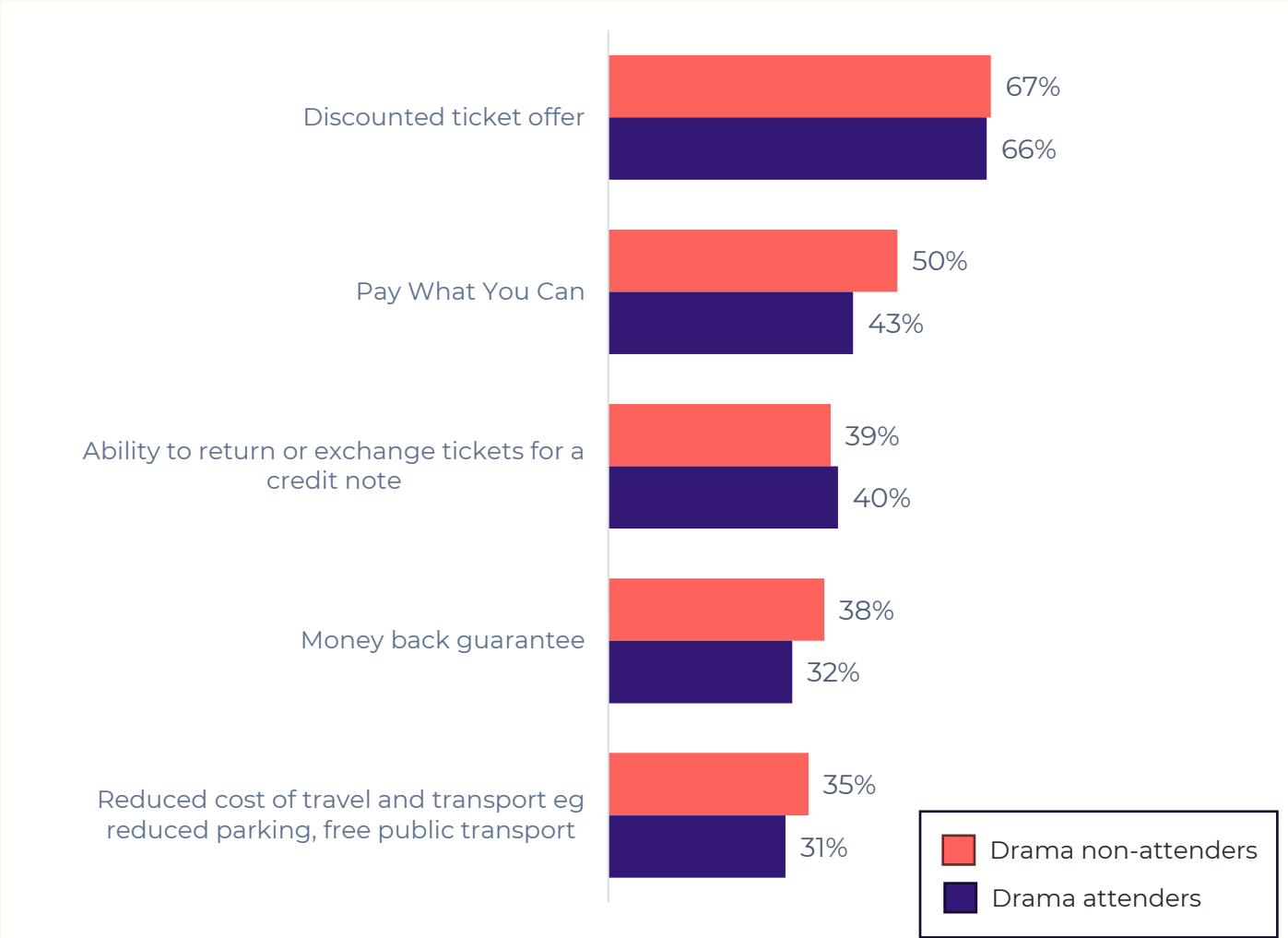
1. Pricing factors, offers
2. Ways to find out more about the show
3. Elements of the production itself
4. Impact of casting
5. Marketing phrases
6. Personal drivers to attend
7. Wraparound events

Attitudes to **pricing** can play a very small or very significant role in decision-making, partly dependent on the overall value placed on the experience

- Spend can flex, even for those who have strict budgets to adhere to
 - “[Referring to Warhorse and Spirited Away] *If the story I’m really familiar with and I really like then yes I will go out of my budget or maximise my budget and say yes, I will go and see this play. But if it’s something I’m interested in but I won’t cry if I don’t go, I’ll be back to my usual smaller budget.*” (Drama attender who books far in advance)
- Where booking is more last-minute and motivated by availability, low-price can be more influential
 - “I think I just see if there are seats available because usually *I buy my tickets quite late* maybe a week before that’s when I like to search and see what seats are available, the price of it.” (Drama attender who books last-minute)
- Lower prices helped to reduce the risk of a less well-known show
 - “If it’s like a new show or show that I never heard of before, if it’s on the a cheaper side like a lottery ticket or two for one, *I think I’m more willing to risk it* than like pay £60 for a ticket for a show that I’m not hundred percent on” (Drama attender)
- **Overall, price awareness and sensitivity is highest where other motivators are lowest eg people are looking outside their normal preferences or have fewer familiar touchpoints.**

Non-attenders were very slightly more likely to find pricing offers appealing and be more price aware for drama, with discounts and Pay What You Can the highest appeal for all audiences

How much would the following encourage you to book? (Pricing factors)
(% fair amount + large amount)



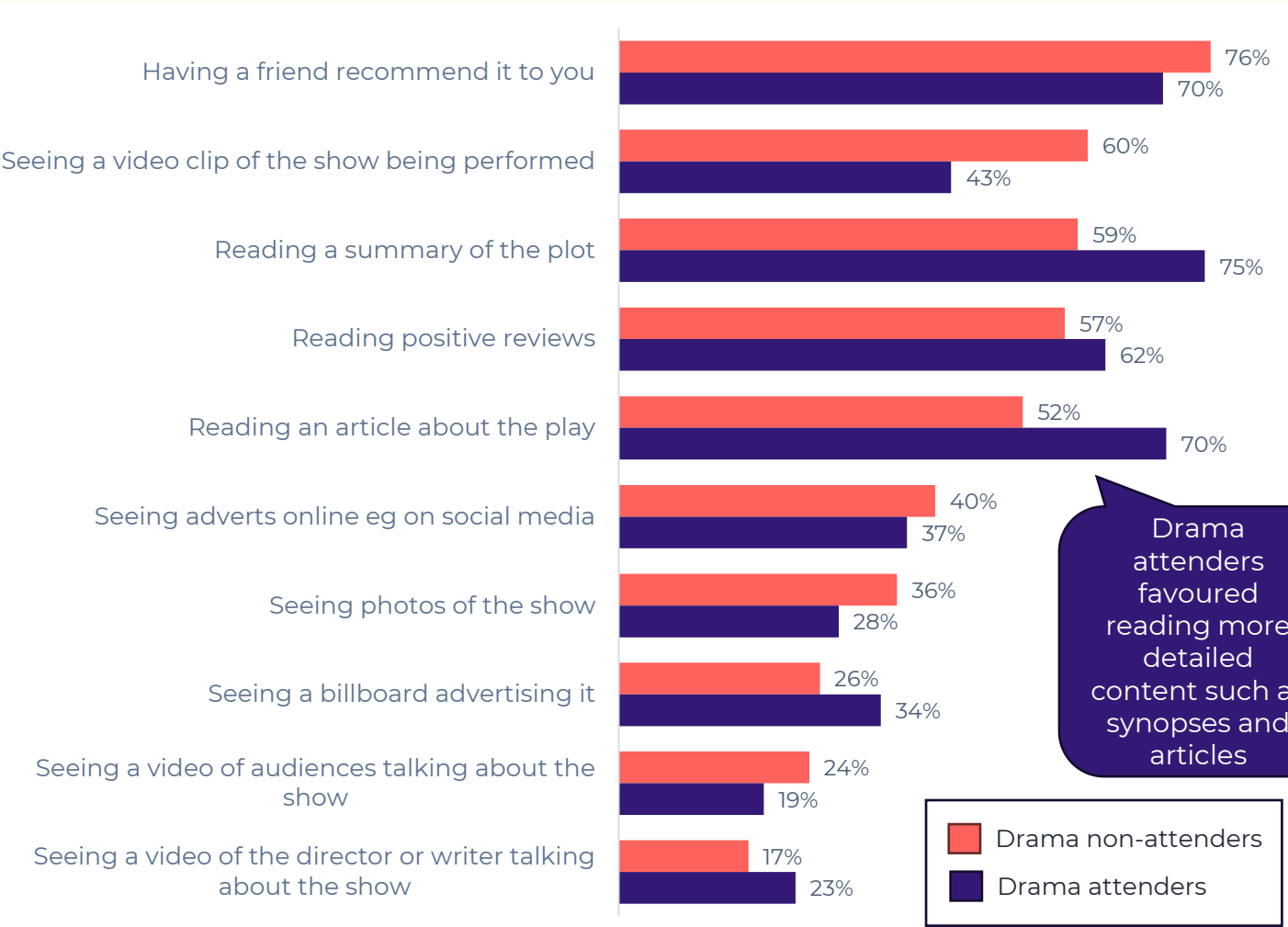
“My local theatre does a season saver thing... I think it's if you book more than four shows in a season, then it works out cheap and that does kind of tickle that thing in my brain of 'I've done an upfront investment'.” (Drama non-attender)

“Being like ‘you can leave in the interval if you want’ - that could be a cool way to do the old money back guarantee: if you leave in the interval you get your money back.” (Drama non-attender)

“Where I am there’s quite a few under 25 £10 tickets, sometimes £15. I know when I've travelled around the country you see other theaters don't have that. So hang on a minute, if I miss something on tour because I'm on holiday when it's at my local where it would be £10, I can see it somewhere else and it'll be £65 for a ticket. It's like, ‘I could have seen that for £10’. I think about the discounts.” (Drama non-attender)

Ways of seeing *exactly* what the show looks like were valuable to non-attenders, particularly video

How much would the following encourage you to book? (Ways to find out more)
 (% fair amount + large amount)



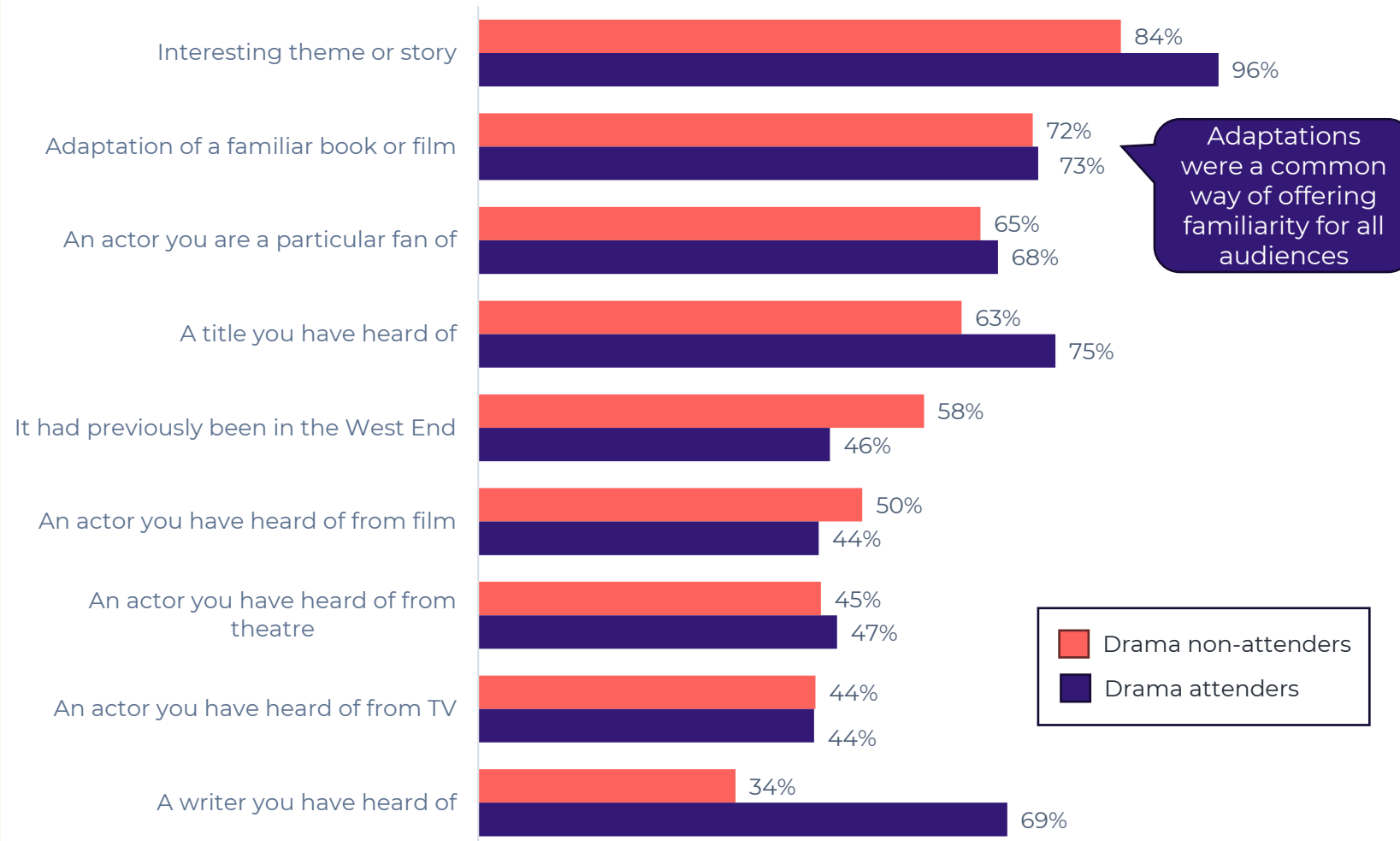
“Usually if it’s something new, I do a lot of Google searches, so I read reviews, I’ll see what other people think about it, I’ll try and watch the trailer, try to get a sneak peek of what’s going on, see if I like it.” (Emerging drama attender)

[Talking about convincing a non-theatre-goer friend to attend] “When I met her I was a massive fan and slowly but surely through showing her videos and telling her about the experience you get, experiencing something live compared to at home and I really got her hooked on musicals... I did show her the soundtracks and I’d show her visual things... I think [visuals are] really beneficial to convincing someone to come see something with you.” (Drama non-attender)

Drama attenders were likely to have more “expert” touchpoints for familiarity than non-attenders, such as the title and the writer

How much would the following encourage you to book? (Production elements)

(% fair amount + large amount)



Familiar writers for non-attenders that came up in the survey and focus groups were Oscar Wilde and Agatha Christie: classic writers rather than any contemporary playwrights

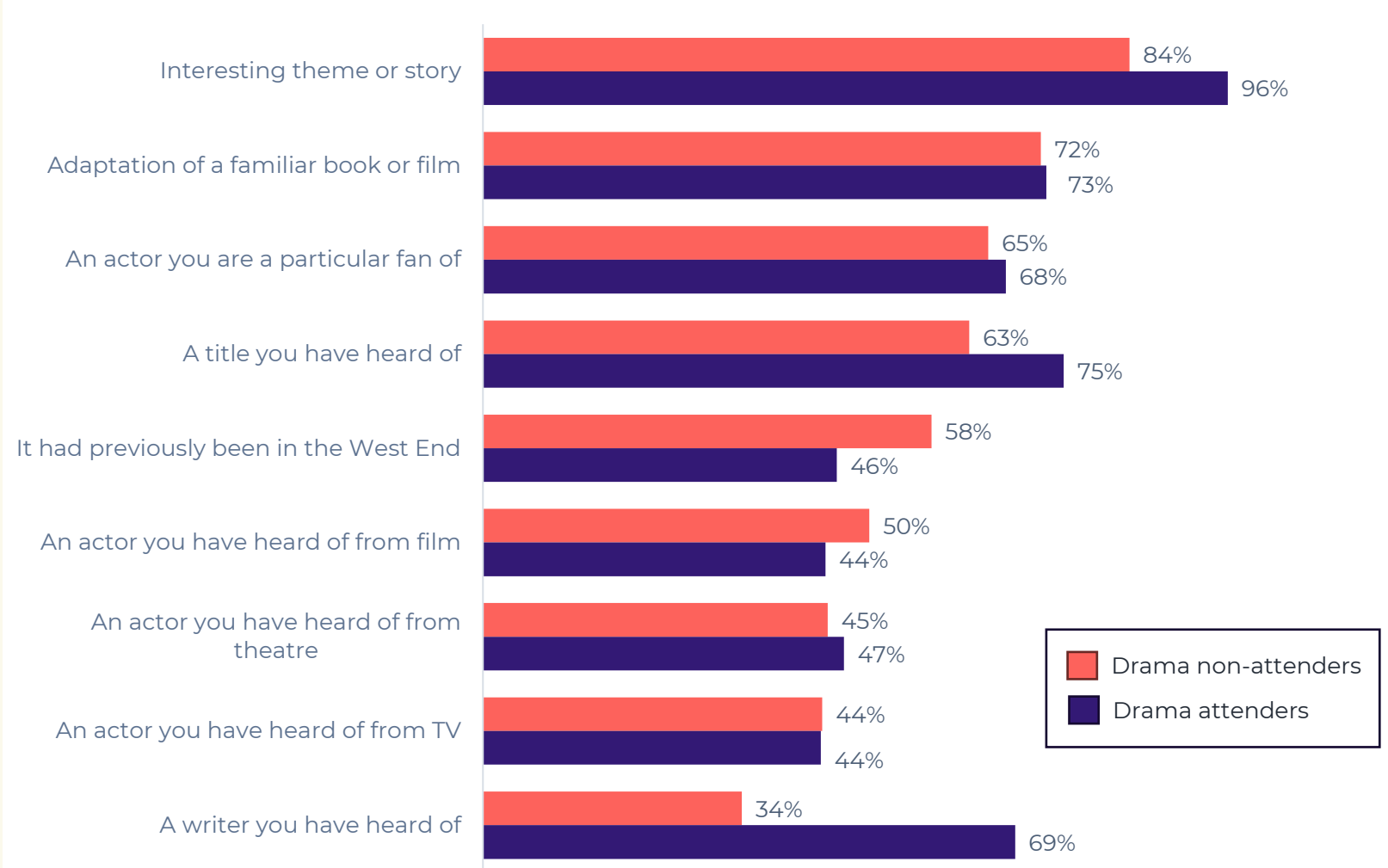
"I'm always quite interested if it's like a movie adoption or if it's been adapted from a book. So last year I saw Shawshank Redemption and I've seen Life of Pi." (Drama attender)

"I kind of hate the trend generally... like Stranger Things the Musical and it's been this TV show, but it undeniably seems to be quite good at getting people interested and hopefully they'll be a springboard onto other stuff." (Drama non-attender)

People were also attracted by something different about a production eg outside production in a castle grounds as it was about the broader experience

Just under half of people surveyed felt that an actor they had heard of might encourage them to book, but in the focus groups this tended to be a small list of very high-profile people – rarely enough alone to drive booking

How much would the following encourage you to book? (Production elements)
(% fair amount + large amount)



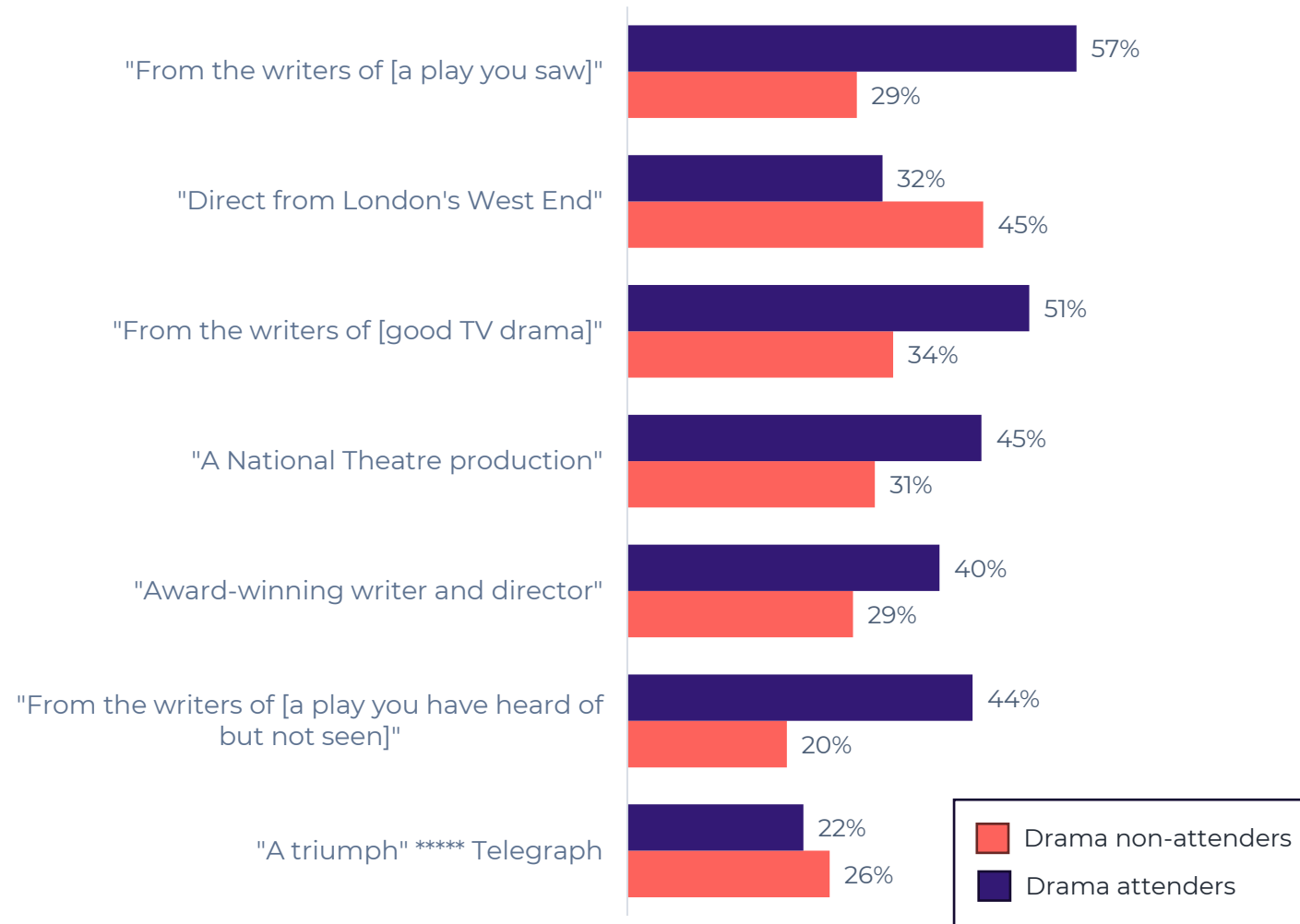
“Usually I don't really tend to care about the people that are in it necessarily because I'm quite happy to see someone amateur do an amazing performance and if I see a celebrity name most the time, I don't even recognise who they are.” (Drama attender)

“I saw Macbeth early this year the David Tennant production, which was incredible and my friends said, but that's not a musical... I studied it when I was at school and... I don't go to as many plays, but if I were to go, I want it to be one I already know the story... You definitely want that kind of guarantee of having a good time.” (Drama non-attender)

Drama non-attenders responded more strongly to the reassurance of a West End transfer and reviews rather than the creative team

How much would the following encourage you to book? (Marketing messages)

(% fair amount + large amount)



"There's one group in Leeds called Imitating The Dog where I will watch whatever they do because I love their productions. But everything else, I tend not to remember names of who's putting it on, so it tends to be based on 'Does that sound like it's a story I'll like?'" (Drama attender)

"Certain theatre companies can often be a seal of approval" (Drama attender)

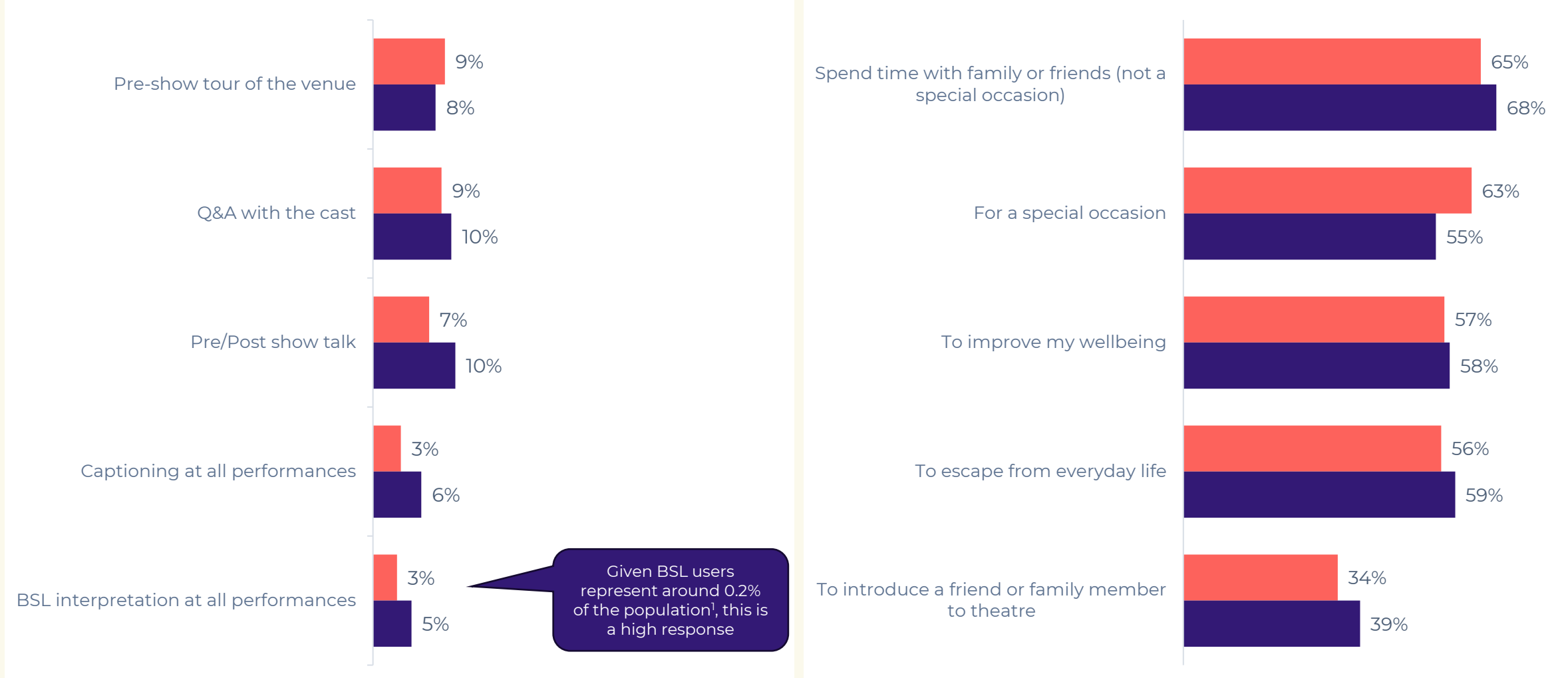
"People-wise I'm not really that bothered and even in terms of companies that put on the productions, I'm not really that familiar with them to be honest. even though I'm quite a big theatre fan, I'm not really that well versed on the different companies." (Drama attender)

Creatives were of value to drama attenders, who were already in-the-know so understood these cues.

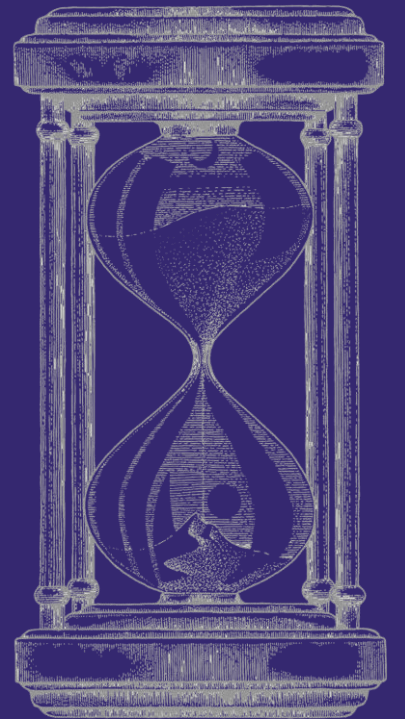
Wraparound events were not effective motivators to book, but the overall experience was important

How much would the following encourage you to book? (Wraparound events)

(% fair amount + large amount)



**What does this mean for
developing a drama audience?**



Let's paint a picture of a typical drama attender

Attitudes

- They have **eclectic tastes, enjoy things that challenge and provoke, enjoy trying new and unfamiliar things, and good entertainment.**
- They aren't too concerned about seeing shows featuring actors they know, and are **happy to take risk on something new.**
- They are up for a bit of **gritty TV drama** (and fine with it at the theatre too), and particularly like crime thriller, psychological thrillers and political dramas – although they also enjoy comedy dramas.
- They see a play as a real chance to **increase their knowledge and understanding**, helping them see the world differently.
- Comfortable with words like '**drama**' and '**play**' as they know what that means.
- Likes to read up on a play, enjoying **plot summaries** and articles more than video content.
- Attends because they particularly **enjoy seeing plays.**
- They are **in-the-know** and have often heard of the shows they attend – they may have studied it or it may be an adaptation of something they have seen or read.

Profile

- **Doesn't have any children** living with them
- **Around 65 years old**
- **Earns more than the average income**



- Most likely to be **persuaded** to book a ticket for a play by a **discounted ticket offer**, a **friend's recommendation** or by **interesting theme or a story**
- Will be **loyal** to a venue they like and may attend in part to **support it.**
- **Values the live experience** and atmosphere of the theatre – the extra energy, the real emotion, the jeopardy.
- Although they are into TV drama, they **prefer watching drama at the theatre.**
- Motivated by the show they want to see, but still **value attending for social reasons.**
- Has more '**expert**' touchpoints like creative teams, so there's more they can connect with.

Behaviours

- **Attends live performances very frequently**
- **Engages very frequently in arts and culture**
- Goes to **film, music and stand-up** but less keen on panto
- Watches **TV drama** but not into soap operas

What might a typical drama non-attender be like?

Attitudes

- They are **easily put off** booking for a play because they worry **about being bored**, **they don't want to take a risk** on an unknown show, or worry about **not being able to afford it**.
- They like **good entertainment** and **tend to stick to things they know and like**, so they can be swayed by something familiar or similar to something they have seen and liked.
- They also **don't particularly enjoy events** that **challenge and provoke** or **things they can participate in**.
- On TV, they prefer watching **true-life drama, crime thrillers** and **psychological thrillers** but are **less likely** to enjoy **classic** or **period drama, political drama** and **fantasy/sci-fi**.
- They are more **interested in 'big name' shows** that are **adaptions of books or films**, have an **actor they are a fan of** or a **title they heard about**.
- They find words **'entertaining'**, **'hilarious tale'** and **'true life drama'** most appealing about a play.

Profile

- **Much more likely to have children** living with them
- **Around 45 years old**
- **Average income**



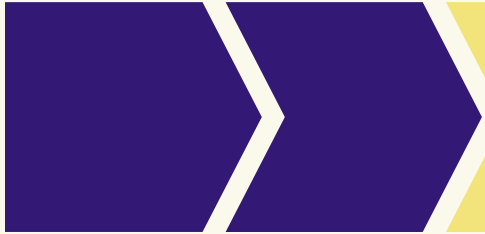
- They like to see proof of quality so something **direct from the West End** or something with a long history is appealing.
- They are strongly **motivated to attend for social reasons** and for **special occasions**.
- **A friend's recommendation is key** to encourage them to attend.
- May to be **persuaded** to book a ticket for a play by a **discounted ticket offer** and like the idea of **Pay What You Can**.
- Prefer **watching drama on TV** to going to the theatre to watch it.
- They need to **read about something** and **watch video content** of what it actually looks like, rather than taking a risk on something new.

Behaviours

- They **attend live performance a few times a year**.
- They **don't engage in arts and culture very frequently**.
- **May enjoy a good soap opera**.

The decision-making process is complex and our job is to try and increase the motivators, offer the right information and remove as many hurdles as possible

Initial hook



People 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).

Investigation



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

Overcoming the hurdles



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?

"But there is definitely something in a good poster, in the description, about giving out the kind of themes that it's like if it's something ...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)

There are levers available at each stage of this journey or funnel, *indigo* and we will need to try a huge array of ideas in order to reach the widest range of potential audiences

Building Awareness

Campaigns which go beyond the conversion algorithms and have high cut-through; advantages for familiarity and West End profile

Generating Interest/Consideration

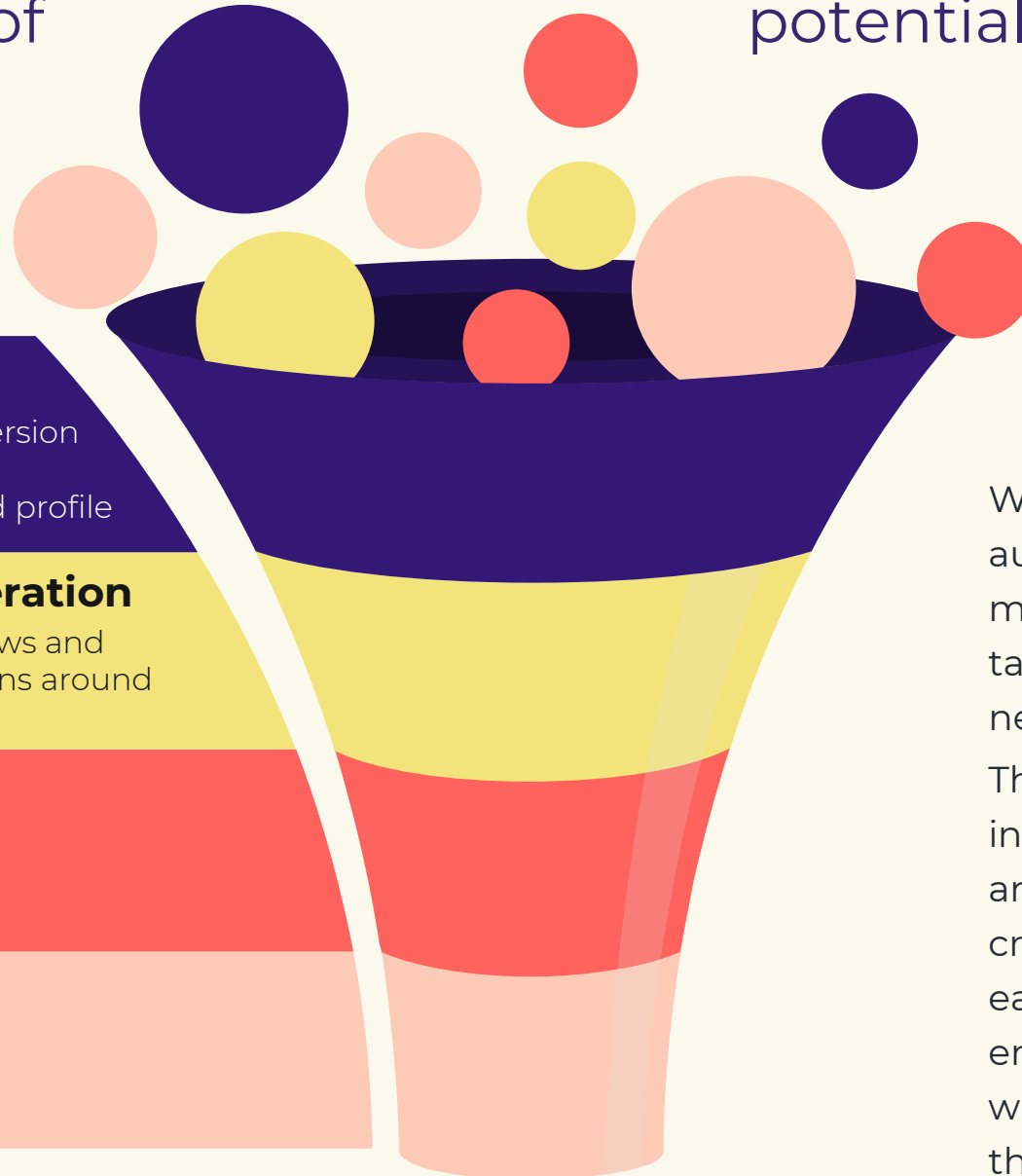
Arresting artwork, word of mouth, reviews and relevant copy as well as brand campaigns around the venue

Increasing Desire

Connecting with audience needs and emotions; reassuring and reducing risk; the whole experience not just the show

Driving Action

Pricing strategies, promotional ideas



We can use tactics to attract new audiences at all stages of the marketing process, but not all tactics will hit the mark with all new audiences.

The toolkit will use the audience insight from the primary research and from venues' experience to create ideas and inspiration for each stage, as well as checklists to enable systematic assessment of whether campaigns are meeting the needs of non-attenders.

Discussions with theatre partners highlighted some wider factors which influence audience development longer term

- **The brand identity of the venue** plays an important role in building and retaining drama audiences
 - A clear reputation for and association with high-quality drama requires a long-term brand-building approach, which includes programme decisions as much as marketing, and requires deliberate investment
 - 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, probably the closest comparator
- **Programming structure and pace**
 - In order to attract and retain audiences, it helps if the drama programme is regular and reliable: this gives new audiences the most opportunity to engage but financial risk would need to be managed
 - Key cultural moments, for example Halloween, can be used to help create gateways to engage in the drama programme where the offer can be connected (eg scary show)
 - From an audience development point of view, longer runs help in generating word of mouth and attracting new audiences, but increase financial risk for the venue
- Although new audiences may book late, **awareness needs building earlier** to ensure there are adequate moments to connect with and increase frequency of being exposed to marketing

Developing Drama Audiences



A Toolkit

in collaboration with Theatre Nation Partnerships, primarily led by Curve Theatre.