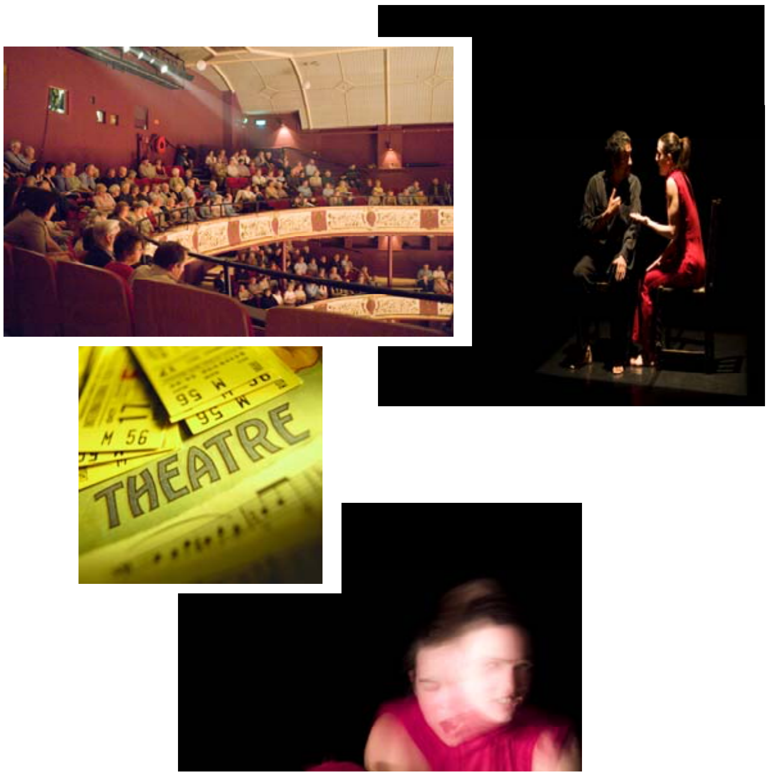
Identifying the Potential

The Development of Theatre Audiences in Wales

Part 1: Executive Summary



October 2009

Cyngor Celfyddydau Cymru
Arts Council of Wales

Noddir gan
Lywodraeth Cynulliad Cymru
Sponsored by
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Preface

by Richard Hogger, Director, Creu Cymru

"Theatres and arts centres form an arterial network that sustains, nourishes and distributes creative content to the people of Wales. They are much more than sterile receiving venues. At best they develop a diverse audience, provide access and inclusion and foster loyalty."

Elan Closs Stephens

The theatre and arts centre sector across Wales offers a rich and varied network, from national and regional centres, to centres serving, supported by and rooted in their own communities. The network offers a range of large, medium and small scale capacity theatres, the majority of which are seeking to develop their programming of theatre and build audiences.

Drama Programming

The starting point for drama programming in the majority of theatres and arts centres is promotion of performances for one or at the most two nights. This pattern of touring is different to that in England, particularly at the middle scale, where week-long runs, or sometime split-weeks, are the norm.

Programming practice is changing. Programmers of theatres and arts centres are becoming curators – working more closely with the creators and producers of work and planning more cohesive and targeted programmes which take account of both the style and content of drama productions. Programme planning is therefore well considered so that it provides a quality artistic experience, but also the chance to build ticket sales. They are looking for a consistency of provision of work. They certainly want to present work that attracts and engages their audiences.

However, there is a perceived paucity of appropriate productions currently available on a regular basis both from Wales and the rest of the UK that affects the potential for consistent programming of drama. The combination of availability of suitable work and these touring patterns seriously affect the theatres' ability to build consistency in drama programming.

Creu Cymru Drama Consortium

With this climate in mind, in January 2007, the Creu Cymru Drama Consortium began a piece of qualitative and quantitative research into drama programming and attendance across Creu Cymru's diverse membership. Some immediate conclusions could be drawn, most importantly the lack of appropriate work on a regular basis and the resulting lack of continuity for drama audiences.

This initial research coincided with the publication of the Arts Council of Wales Drama Strategy which identified a key concern: that audiences needed to be developed for drama.

It was in this context that Audiences Wales received funding from the Arts Council of Wales to undertake a wide-ranging piece of research to investigate further the picture of drama programming and the possibilities for building audiences. As well as interrogating box office data and studying reports, Audiences Wales interviewed the sector (theatres and companies) and, importantly, the audiences and potential audiences themselves.

'Identifying the Potential'

Audiences Wales' extensive research has identified the potential to develop the drama presenting sector and increase the number and frequency of attendances. Some of the findings may be well known to programmers and marketers, through examining their box office records for drama. Some marketing practice is purely pragmatic as many of the theatres and arts centres offer a mix of art forms, with drama as only one element of a diverse programme. In others, marketing is often undertaken by a member of staff with at least one other responsibility.

The report identifies some key profiles of drama attenders - many tending to be risk-averse - but the theatres and arts centres are also being risk-averse in their programming, by choice or necessity.

The report also comments on the need to develop relationships between theatres and arts centres and companies – particularly issues of programme choice and responsibility for building audiences. Creative co-operation is required, and Creu Cymru and the Wales Association for the Performing Arts are already working together to facilitate this.

Programming and marketing should be indivisibly linked to agree programming strategies and targets, and 'Identifying the Potential', as well as providing a body of research, also offers practical approaches to all those working in programming and marketing in the sector. One the most important elements to come from it is the development of marketing resources designed to support all those working in marketing, whether as one responsibility within many or as a dedicated role within an organisation.

Introduction

1 Aims of the research

Audiences Wales received funding from the Arts Council of Wales to undertake a major research project on current and potential audiences for drama in Wales.

The impetus for the project came from the Arts Council of Wales's drama strategy which expressed the concern that audiences needed to be developed for drama, particularly in light of the new English language National Theatre for Wales. There was also in-depth discussion about current and future audience levels at the Creu Cymru Drama Consortium Meetings, and there were concerns in the sector about the long-standing problems in attracting drama audiences.

The project aims were:

- To identify current trends in drama attendance in Wales
- To provide profiles of drama attenders and potential attenders
- To assess the approach to and correlation of programming and marketing
- To identify areas of good practice and potential schemes and initiatives to develop attendance at drama events in Wales

2 Methodology

A steering group was established of representatives of the Arts Council of Wales, Creu Cymru and Wales Association for the Performing Arts. This group met at various intervals to inform the phases of the project and provided invaluable feedback and support across its duration.

Methodologies for individual phases of the project are detailed in the corresponding sections of this report. A summary appears below:

- *Phase 1:* Box office data analysis, primarily via The Knowledge
- *Phase 2:* Setting the information from Phase 1 in context using Arts in Wales survey, TGI data and Area Profile reports
- *Phase 3:* Face to face and telephone interviews with 19 receiving venues, 3 producing venues and 8 theatre companies
- *Phase 4:* 120 telephone interviews and 8 focus group discussions in English and Welsh with drama and non-drama attenders across Wales

Audiences Wales would like to thank all the sector consultees for their contribution to this research.

Summary of report findings

Phase 1: Drama Ticketing Data Analysis

Phase 1 of the research comprised in-depth analysis of box office data via Audiences Wales' The Knowledge[1] programme, with additional analysis of data from three further venues. The aim was to build a detailed profile of attendance at specific drama art form categories in Wales over the past three years.

- Between 1st April 2005 and 31st March 2008, just under one million tickets were sold for drama events[2], generating a revenue of over £8.0m.
- The South East Wales region has the largest share of ticket sales (45%), revenue (49%) and performances (42%) for drama. North Wales has the next largest share – ticket sales (32%), revenue (36%) and performances (32%). The other regions have only a small percentage share of sales, revenue and performances for drama.
- North Wales is, however, 'punching above its weight' in relation to its population density. This picture may change once the impact of Theatr Gwynedd's closure filters through into the statistics.
- In 2006/07, the number of drama performances that took place was much higher compared with 2005/06 and 2007/08. Ticket sales per performance increased each year and were highest in 2007/08. This may reflect the type of drama on offer.
- In 2006/07 there were large increases in the amount of provision for English language Children and Young People's Theatre and English language Classical Plays.
- The numbers of Welsh language Contemporary Plays and English language Physical Theatre performances have increased steadily across the three years.
- English language Community/Amateur Theatre, English language Contemporary Plays and Welsh language New Writing have fallen in numbers across the three years.
- Across the three years the overall trend shows that English language Children and Young People's Theatre, English language Classical Plays and English language Contemporary Plays have both a large share of performances and ticket sales. Conversely, both English language New Writing and Welsh language New Writing have a lower share of ticket sales in relation to the performances available.

[1] The Knowledge was set up by Audiences Wales in 2006 to analyse box office data, track attendances for the performing arts and provide an overview of the performing arts sector in Wales.
[2] The following drama types were analysed in Phase 1: English and Welsh language Children/Young People's Theatre, Classical Plays, Community/Amateur Theatre, Contemporary Plays, New Writing and English language Experimental Theatre and Physical Theatre.

- English language Classical Plays and English language Contemporary Plays have a large number of performances available for the general public to see. Consequently, it is not surprising to observe that a greater proportion of the audience attending these classifications also crossover to other types of drama. Also, bookers attending Welsh language drama and New Writing crossover more widely to other drama classifications.
- Surprisingly, 70% of ticket purchasers made just one booking for drama within the three year period, 2005-2008.
- More frequent drama bookers generate proportionally more revenue.
- English language Contemporary Plays and English language Classical Plays have a higher percentage of more frequent bookings, followed by Welsh language Contemporary Plays. The frequency of booking will also reflect the opportunity to see various events, as well as the desire to purchase tickets for programmed events.
- The largest proportion of drama bookers in Wales in 2007/08 was from the Mosaic Group[3] Suburban Comfort at 19% followed by Symbols of Success at 18%.
- In relation to GB, Wales has a much larger percentage of households that belong to Ties of Community, Blue Collar Enterprise and Rural Isolation Mosaic Groups and a smaller percentage of households that belong to Symbols of Success, Suburban Comfort and Urban Intelligence.
- Analysis of all drama bookers by Mosaic Groups, crossover between groups and mapping of Wales is available in Part 2 of this report. This analysis defines drama bookers across Wales and identifies potential for new audiences.

[3] Mosaic is a geo-demographic segmentation system which combines geography, demographics and lifestyle information. Every full postcode in the UK will be classed as a Mosaic type.

Phase 2: Contextual Analysis

Phase 2 placed the findings of Phase One within the context of the overall adult population in Wales and Great Britain by referring to published surveys. The Knowledge is restricted to ticket purchasers, while the surveys are based on a representative sample of the adult population and therefore will include people who attend arts events but whose details do not necessarily appear on venue box office systems.

The surveys referred to were:

- 2005 Arts In Wales Survey published by the Arts Council of Wales[4]
- GB Target Group Index Survey (TGI) 2004-2005/6[5]
- Area Profile Reports[6]

ACW Arts in Wales Survey

- Just over a quarter (27%) of adults in Wales attend plays[7] once a year or more.
- The demographic profile of play attenders shows that they mostly belong to social grades ABC1 (particularly AB) and tend to be women, but encouragingly belong to all age groups.
- It is interesting to observe that a high percentage of play attenders are also interested in other cultural activities such as literary events, ballet and opera.
- When asked about their frequency of attending arts events, the general pattern is for plays to be attended a few times a year or once a year. This is more frequent when compared with the analysis of the ticketing data and may reflect those people who attend but have had their tickets booked by somebody else[8].
- Plays are attended at a similar frequency as other artforms, the only exceptions being cinema and other live music which are attended on a far more frequent basis.
- An analysis of attendance at plays by the Arts Council of Wales' three regions shows that as a *percentage* of the population, North Wales and Mid Wales have above average attendance. However, as South Wales is more densely populated, *numerically* South Wales has the greatest number of play attenders.

[4] Representative sample size of 6,851 adults in Wales aged 16+
[5] Representative sample of 25,000 adults aged 15+ in Great Britain
[6] Contain modelled data on arts attendance from the Target Group Index Survey
[7] Respondents are likely to have included attendance at children's plays and amateur play productions.
[8] Audiences Wales often finds on its own surveys that a high proportion of ticket bookers that appear on a non-attenders list for a particular artform or venue will have attended as a result of somebody else in their party responsible for the ticket booking.

- There are wide variations across the unitary authorities in relation to play attenders. Some authorities such as Gwynedd and Anglesey have a very high percentage of their population that attend plays – 50% and 43% respectively. Conversely, all the authorities in the South Wales Valleys areas have a very low percentage of their populations that are play attenders, for example, only 12% of adults in Rhondda Cynon Taff say that they attend plays.
- Welsh speakers are far more likely to attend plays compared with non Welsh speakers – 41% vs 23% (although they could be attending plays in either English or Welsh).

Target Group Index Survey

- A comparison of the percentage of adults in each region in Great Britain shows that Greater London has by far the highest percentage of play attenders (36%), followed by South East England (31%) and South West England (29%). Wales has the lowest percentage of adults who attend plays (19%). The figure for Wales is similar to the North of England, but well below Scotland's figure where 24% of adults are play attenders.
- Similar to the Arts In Wales Survey, the demographic profile of play attenders across Great Britain shows that there is a bias towards women, social grades ABC1, and adults in the older age groups of 45+ are more likely to attend.
- The frequency with which plays are attended averages out at 2 plays a year.

Area Profile Reports

- The range of the percentage of adults in Wales expected to attend plays based on their demographic profile varies from around a fifth to a quarter of the population[9] depending on the area; by and large play attenders are biased towards women and ABC1 social grades.

[9] The Taking Part surveys conducted in Scotland, England and Northern Ireland found that play/drama attenders ranged from 17% to 26% of the adult population in 2006 and 2007.

Phase 3: Sector Consultation

Phase 3 involved consulting with venues and companies about their approach to programming and marketing for drama[10].

The main areas covered in the interviews were:

- Programming
  - Artistic vision
  - Drama programming decisions
  - Changes in drama programming
  - Touring in Wales compared with England (touring companies only)

- Marketing
  - Popularity of drama at venue or different venues (if touring)
  - Marketing methods
  - Audience development
  - Other initiatives and schemes
  - Education and outreach

Venues

- 5 out of the 21 venues interviewed were also producing or co-producing. A further 2 venues were either supporting a resident company or supporting emerging artists. The co-producing element was considered a strength for the venue as it helped with building audiences for their programme.
- When asked about the factors that influence drama programming, the cost of a drama production was mentioned first by many venues. Many venues are in a financial quandary of weighing up the desire to programme a particular play against the ability to minimise potential financial losses.
- The marketing effort required for programming certain types of drama such as new and unfamiliar work was also a major consideration for many venues, given the low staffing levels of many venue marketing departments.
- Positive changes in drama programming included Creu Cymru bringing in more middle scale drama, Arts Outside Cardiff money helping some venues to develop their drama programme, more coherence in

[10] For Phases 3 and 4, drama was defined as Classical plays (Shakespeare up to WW2), Contemporary plays (Post WW2), Experimental theatre, New writing (1st performance in last 3 years), Physical theatre. Other forms of theatre such as pantomime, musicals, amateur and children's drama were excluded for the purposes of these phases.

programming in Wales, growth of Welsh language theatre i.e. Theatr Genedlaethol Cymru.

- A few felt it was difficult to detect any particular trends because of the lack of consistency and unpredictability of the product available and what is being toured.
- Less positive aspects of drama programming included a lack of availability of drama product, a decline in good quality productions willing to tour to certain parts of Wales, loss of companies entirely or companies no longer touring in Wales, less new writing and safer programming.
- A few venues felt that inconsistent funding and lack of funding has led to sporadic programming of quality drama provided by visiting companies. The irregular visits make it difficult to build audiences for this type of quality drama if the public is unable to get into a habit of expecting a certain standard or style of work regularly.
- Generally speaking, a play sells well if it has a well-known title or has some other familiar element to the audience such as established cast names, a well-known production company, a subject matter that resonates with the audience, West End reviews and if audience members know someone in the production.
- If a venue is strongly associated with a style of work, such as new and cutting edge experimental work and international work, that will also generally sell well. Also, if a venue has had an opportunity to build up audiences over a long period of time to develop a sense of trust, this will serve as an endorsement and support an unknown company.
- Plays that are difficult to sell cover anything that is unknown and unfamiliar to people, especially an unknown title, an unfamiliar or obscure story and unknown company. Some of these elements are associated with new writing though it is important to emphasise that it is not new writing itself which is the deterrent but that new writing will include some of those elements. New writing with a populist slant will be easier to sell.
- The most frequently mentioned marketing method was direct mail (brochure, letters and leaflets). Some venues use sophisticated direct mail techniques and segment their database, producing more than one version of a direct mail letter aimed at different audience segments for the same show and/or targeting attenders of other art forms, or carrying out a careful analysis of their mailing list.
- Drama-led venues realised that generally people seem to require more information on a play and need more persuading, compared to other artforms such as a musical or music event.
- Consultees were asked if they have a strategy for drama in their marketing plan. Only one venue confirmed that they have this.
- On the whole, marketing drama is considered far more resource hungry especially in terms of staff time compared with other artforms.

- There were several comments about the lack of marketing material from some companies, including some of the basics such as press releases and marketing packs, as well as a DVD.

Companies

- Most of the companies interviewed had various issues with the venues they toured to. These ranged from communication problems and programming limitations to difficulties in obtaining box office data for marketing the company. The value of having an open dialogue with venues was stressed. There were positive comments on the recent Creu Cymru / WAPA 'speed dating' event, which had brought companies and venues together.
- Developing audiences was seen as central to the artistic work of the companies. All were clear that they wanted to produce work which they believed would be relevant and appealing to their audiences. To this end, companies spoke of the need to know their audiences and understand their expectations.
- Several companies said they had made a conscious decision to build audiences' trust in their work before 'pushing boundaries' in terms of programming, since people might then be more willing to take a risk with a less well-known production. This required making regular appearances at a venue over several years to establish familiarity with their work and the company name.
- Key programming issues included the limitations of having split weeks, an excess of product in the Autumn, venues becoming more risk averse, a lack of ACW support for more adventurous programming and a perception problem about a lack of audiences for drama.
- Companies believed they do build an audience for their productions, but that it is difficult to prove because they do not have access to the box office analysis.
- Companies commented on the limited marketing capacity of some venues in Wales (either in terms of their skills or resources) and emphasised that they are reliant on the venues to a large degree to market their productions.
- Companies highlighted the importance of some element of familiarity for audiences when it came to choosing which production to see. Of particular importance was the title of a play, to both venues and audiences.
- In general, finding themes or elements within a production with which audiences could identify was often successful. Some companies felt that audiences did not necessarily think about particular types of drama, but looked at more fundamental elements like subject matter and the type of experience they were likely to have.

- When asked which types of drama were harder to sell, most companies mentioned new writing or an unknown text. Audiences were thought to prefer work that was more familiar, or that had endorsement from good press reviews or positive word of mouth.
- However, some companies identified that if the new writing had well-known themes which resonated with audiences, it tended to do better. One venue-based company said their audience was more likely to trust their own productions of new writing than those of a visiting company. This was partly due to these having a longer run to attract positive press and word of mouth and the value of the venue's brand.
- When asked what they felt worked best in terms of marketing activity for drama, companies highlighted the importance of generating word of mouth and working with groups, especially in rural areas.
- Companies consistently reported being able to obtain only limited information from venues, other than sales reports from the box office. Information on audience loyalty and reach, as well as feedback on the effectiveness of marketing activity did not seem to be making its way to the companies.
- In one instance where a company was co-producing with a venue, obtaining and sharing data seemed to be working more successfully, and audience attendance levels and trends were tracked across a tour and shared across the tour venues. This was seen as a way of trouble shooting and improving marketing for the next tour.

Phase 4: Audience Research

Phase 4 involved consultation with drama and non-drama[11] attenders across Wales via telephone interviews and focus groups. Respondents were drawn from participating venues' box office data, and were therefore all existing arts attenders.

Telephone interviews

- The drama attenders tended to be older, with 18% of respondents aged under 45 and 38% of respondents aged 65 or over.
- In contrast, 30% of non-drama attenders were aged under 45, and 25% of respondents were aged 65 or over.
- 92% of the drama attender respondents were from social grades ABC1, compared to 76% of the non-drama attenders.
- 88% of drama attenders said they felt they went to plays about the same or more often than they did five years ago. Generally, this seemed to be due to being retired and having more time on their hands and also that children had grown up so they were now freer.
- When asked to rate the importance of various reasons for choosing to attend a play in Wales, the most important factor was felt to be *Which play is being performed*, which 84% of drama attenders said was Very or Quite Important.
- The main factor that might discourage a drama attender from going to see a play was dislike of the selection of plays on offer (70%).
- 80% of drama attenders Strongly Agreed or Agreed that it did not matter if you did not know the story of a play prior to seeing it.
- 76% of drama attenders Strongly Agreed or Agreed that there is a good range of high quality plays on offer in Wales.
- Views were more divided over whether drama attenders were more likely to go and see a play if they were familiar with it. 55% Disagreed or Strongly Disagreed that familiarity meant they were more likely to go and see a play, whereas 43% Strongly Agreed or Agreed with the statement.
- Around a third of drama attenders said they attended plays in Welsh.
- 58% of non-drama attenders said they did not go to plays simply because they preferred other types of event.
- 38% of non-drama attenders said they kept meaning to go to a play but never got around to it.
- The most popular factors that might encourage non-drama attenders to go and see a play, all mentioned by 72% of respondents, were a well-known star, an acclaimed production and a special ticket offer, closely followed by a familiar title (70%).

[11] Non-drama attenders, for the purposes of this study, were defined as being people who had not attended any of the drama events, as defined in Phase 3 above, in Wales in the last three years.

- The most important reason for non-drama attenders for choosing to attend an arts or entertainment event in Wales was the ambiance of the theatre (87%).
- Drama attenders were slightly more aware (45%) than non-drama attenders (35%) of the new National Theatre Wales.
- 80% of non-drama attenders were interested in seeing a NTW production, a figure not significantly lower than that of current drama attenders who said they would be interested (97%).
- The drama attenders were keen to see the new company putting on a broad range of productions – over a third did not want to specify any particular drama type (36%). A similar number (31%) requested mainly classical or what they termed 'traditional' plays – e.g. Shakespeare, Oscar Wilde.
- Nearly half of the non-drama attenders (47%) expressed an interest in seeing the new company put on comedy productions. Their comments reinforced the idea that they wanted a lighter theatre experience – to be entertained rather than challenged.
- The most popular events/activities with drama attenders, apart from plays, were going to museums (83%), art exhibitions (78%) and the cinema (68%).
- The most popular events/activities with non-drama attenders were comedy (63%), going to museums (60%) and the cinema (58%).
- When it came to marketing, both sets of respondents felt that the brochure was a very significant information source (97% of drama attenders and 93% of non-drama attenders).

Focus groups

- Familiarity with the story seemed to be very important to the drama attenders.
- There were several comments about the fact that drama was felt to be more thought-provoking, with the experience requiring more mental effort than other art forms.
- In Carmarthen, respondents felt strongly that there was a lack of drama provision locally. Reasons for this ranged from there being fewer amateur companies, a demographic shift to the cities and funding issues.
- Cardiff and Aberystwyth respondents appeared to be the most satisfied with their drama provision.
- Most respondents had travelled occasionally to see drama. Often, this was to Cardiff (for those respondents not in that area), Stratford and London. Respondents in Mold tended to travel to Manchester and Liverpool because of their relative proximity.
- Factors said by the non-drama attenders to discourage them from going to see plays included money and time constraints (meaning that people

are less likely to take a risk with something unfamiliar), preference of a different art form for their escapism (often music or musicals), a sense that plays are less of a spectacle than musicals (which could mean they are less entertaining), not feeling as 'involved' as an audience member by a straight play and a lack of information.

- For drama and non-drama attenders, a familiar element in the production was key, whether it be the title, actors, company, director or subject matter. The reassurance of a good review or recommendation from friends or family was also important.
- Across all the groups, classic / traditional plays and contemporary plays were the most popular. It is important to reiterate the age profile of the focus groups, which tended towards the older age groups, which might in part contribute to more conservative, traditional tastes. However, this is also representative of a large proportion of theatre goers.
- There was interest in the idea of National Theatre Wales giving 'performances in unexpected and unconventional spaces', such as pubs and village halls. People felt this could be a good way to reach those who were not currently engaging with events in the theatres.
- Several groups, particularly those in Mid and North Wales talked about the importance of NTW having a Welsh perspective in their work, whether it be Welsh themes and stories, or acting as a training ground for Welsh acting and writing talent.
- Not surprisingly, since respondents were recruited from venues' mailing lists, season brochures were still a popular source of information. However, many respondents were also quick to mention emails and venues' websites.
- Key elements for brochure content on drama were a good synopsis, not too small a font size, image and copy that catch the eye quickly, strong images and, for non-drama attenders, press quotes.

Conclusions & recommendations

Conclusions

There are some significant issues highlighted by this study and some positive things to say about drama in Wales. Overall, nearly a million tickets for drama events were sold in Wales across a three year period, 2005-08. Around 20-25% of the population in Wales is going to plays. Although the number of drama performances has fallen, ticket sales per performance have increased each year. Encouragingly, the recent ACW Omnibus Survey for 2008 also shows an increase in drama attendances.

Even so, the study indicates that there is potential to develop the sector and increase the number and frequency of attendances. Audience development for drama, whether encouraging new attenders or persuading bookers who currently attend one type of drama to try something like new writing or experimental theatre, is, however, where we start to identify some key challenges.

It is a well-known phenomenon that more frequent bookers generate proportionately more revenue, and this was also shown to be the case with drama bookers. However, these frequent bookers only represent a very small percentage of audiences. It is important for the sector to be aware that the majority of bookers (around two thirds) are infrequent attenders at theatres and arts centres, and are generally likely to be less involved and less interested. When faced with lots of different ways to spend their leisure time, these people are going to take a lot of persuading to change their arts behaviour.

> ***"Because of budget and because of having the kids, I want to know I'm going to really enjoy something and I know that I will with musicals, but with a play, it's a risk"***
>
> Mold non-drama respondent

The study also demonstrated that the majority of drama attenders tend to be risk averse. They prefer drama product that is familiar to them, that has some known element such as the title, a well-known actor, endorsement from the press or positive word of mouth within their community. There needs to be some tried and tested element to hook them in. These factors become even more important to those who rarely, if ever, attend drama, as they are seeking some guarantee that they will enjoy the performance. This suggests difficulties for certain types of drama, particularly new writing.

"I find as I get older, I tend to want to see lighter hearted plays…I find a lot of black, dark plays just a bit depressing now…I do like to be cheered up and come away with a smile"
Cardiff drama respondent

In general, the study highlighted the fact that people want to be *entertained* when they go to the theatre. Plays with more downbeat subject matter tended not to be as popular, even with regular drama attenders. Furthermore, decisions about what to go and see, often based on the season brochure, can be made quite quickly, according to what has caught their eye when they flick through the information. People are not necessarily reading brochures cover to cover. Direct mail is widely used by venues, often successfully, but there needs to be constant monitoring and evaluation of marketing tools such as this, bearing in mind few people mention direct mail as their preferred source of information about drama events. Personal recommendation or word of mouth were rated very highly, especially by non-drama attenders.

The research also outlined profiles of drama attenders in Wales, with the Mosaic groups Suburban Comfort, Symbols of Success, Happy Families and Urban Intelligence showing a higher propensity to attend certain drama types. Levels of likely crossover between different drama types were also indicated, being particularly high between contemporary and classical plays in either language.

"I'm not sure whether venues are willing to take a gamble at the moment. Their budget restrictions seem to be limiting their choices and recently this has also reduced the amount of performances of a particular show they may be willing to stage. People are generally taking safe bets now" Theatre Company

If audiences seem risk averse, the venues in the study also demonstrated this trait in their programming. A limited amount of new writing and experimental work was being programmed, with venues tending to prefer to restrict the levels of drama in general or to take product which was felt to be a safer bet, financially and with audiences.

A key issue for the sector is the lack of availability of drama product, which was considered by many to have declined over recent years. This is a complex area in need of further debate, but particular gaps were thought to include new writing, small to middle scale drama and

Shakespeare for schools, as well as a decrease in the range of companies touring in or to Wales. Associated with this is the problem of short runs for drama product, because venues feel they will be unable to sell sufficient tickets for more than a couple of nights. This programming pattern is causing difficulties across the board. Venues have many more separate events to try to sell, leading to over-stretched resources. It is harder to build up an audience for drama if the supply is sporadic and events last only one or two nights. The all-important word of mouth and recognition of the company barely have time to register before the event is over. It is harder for the venue to build a sense of trust with their audience. All in all, there can be a sense of starting from scratch for venue, company and audience for each new production.

"Ask[ing the] venue for data on audience – only one does this – makes you feel as if you're asking for a favour, and yet this data is needed to provide a better service" Theatre Company

There was concern over the relationships between companies and venues. With a few notable exceptions, there is scope for much greater communication and information sharing between the two. In particular, venues do not appear to be providing sufficient marketing support for the companies in terms of access to audience data. There is misinterpretation of the Data Protection Act, and companies are thus being hampered in their attempts to understand audiences in their catchment areas, monitor the success of marketing activity and build up their own mailing lists. There were also issues about the planning of drama events, with some companies not appreciating the notice needed by venues to schedule their productions into the programme.

"When you look through our programme, the drama is always the thing we spend the most time promoting and get the least reward for in terms of an audience" Theatre Manager

The pressures on the venues' marketing teams were very clear. Most described drama events as being harder to sell than other elements in their programme such as comedy, cinema or music. The result is that staff are often 'fire fighting', having to concentrate their efforts primarily on *publicity* for forthcoming events rather than being able to develop sustained audience development strategies. Closer communication and information sharing between venues and companies would help these issues, and facilitate the development of long-term relationships and the formation of shared strategies. On a more positive note, in general, programmers and marketers within an organisation were working closely together, which is crucial for successful drama programming and development.

In summary, the research has clearly shown that there is potential to increase audiences and increase the frequency of attendance to the majority of current programming. Similarly, it is clear that theatre companies, theatres and arts centres, and ACW and other bodies want to develop the artistic scope of drama in Wales as well as its impact on other art forms and on social and political agendas within Wales.

As an art form, drama is a live, social experience that can entertain, question and reflect on a modern Wales. It is central to the social and economic impact of the arts and critical to the strategic investment made by government bodies. It therefore demands a shared vision and greater strategic focus from the sector supported by further investment to address the perennial issue of limited resources that this study, like many before it, has identified.

If the companies, theatres and arts centres in Wales are to deliver their own potential and reach a greater range and number of audiences in Wales, a shared vision and increased, targeted and strategic investment are key.

Recommendations

Although the study found some examples of innovative practice in Wales, it also found that many organisations need to build a more strategic marketing approach before they are in a position to take on audience development initiatives. The recommendations therefore reflect this need for a planned, co-ordinated approach across the whole organisation. They are presented in no particular order, recognising the different priorities within the sector.

The audience experience

Venues and companies need to make the audience's experience central to their drama marketing. People want a clear idea of what a play will be about and what sort of experience they will have. A broader range of tactics need to be employed if new audiences are to be developed. There also needs to be recognition that more time needs to be allocated for planning and implementing drama marketing than for other art forms. Working smarter, with a more targeted approach, will help to get people who already attend plays to go more often, and persuade people who attend other art forms to give plays a try.

- Audiences want to know what the *story* is and what they can expect from the production. Publicity should concentrate on portraying an accurate picture of these elements.

- The sector needs to be aware of how risk averse most audiences are. Try to emphasise any familiar points about a production. Look for the element which will hook the audience in – it won't necessarily be that something was successful at the Edinburgh Festival. Don't think about it from an industry point of view.

- In a similar vein, Wolf Brown's study on the Intrinsic Impacts of a Live Performance (2007) is recommended as it contains a lot of information about pre-performance anticipation and the importance of ticket buyers opting for theatre experiences that reinforce a person's cultural identity and validate their preferences and tastes.

- Monitoring and evaluation of all marketing tactics is crucially important, to ensure that the best use is being made of a venue or company's resources. A lot of direct mail is being used to sell drama, yet audiences increasingly cite other methods, e-marketing and particularly word of mouth, as being preferred. Where direct mail is not producing a good enough result, there may need to be a change of focus onto these other marketing methods. This is particularly the case with younger and new audiences, who may not be on the mailing list to receive the brochure. Companies working in communities at small social clubs need to find other ways of promoting their work, and word of mouth, through relationships with local leaders, is an effective method.

- Venues need to appreciate the importance of good data capture rates at the box office to build an accurate picture of audience booking patterns and maximise opportunities to sell to attenders of other art forms.

- Linked to this, The Knowledge gathers information from many venues across Wales and should be embedded as an objective tool for monitoring trends in provision and ticket sales in the drama sector. Audiences Wales need to continue to communicate the value of The Knowledge as an objective tool for monitoring trends in provision and ticket sales.

- In-house research can be a quick and cost-effective way of obtaining a more accurate picture of a venue's audiences. For example, it could comprise a brief emailed questionnaire, feedback from front of house staff and customer comments cards placed in foyer areas.

Focus on infrequent attenders

84% of the population fall into the 'Little if anything' or the 'Now and then' groups, attending arts activities occasionally at most, and primarily attending the most popular, rather than niche, activities – From Indifference to Enthusiasm: patterns of arts attendance in England (ACE, April 2008)

Only a small percentage of people can be described as highly involved and passionate about the arts. Those of us working in the industry must not assume a greater involvement and loyalty than they have. The study found that 70% of ticket purchasers made one booking for drama in three years. There is, therefore, great potential in seeking to increase the frequency of drama attendance of these large numbers of infrequent attenders in venues' box office systems. This has been highlighted by other studies and schemes.

There are tools available to help, including the Audience Builder arts marketing management approach, from Morris Hargreaves McIntyre. This mentions the need to re-focus on irregular or lapsed attenders, after finding that most venues tend to concentrate on marketing to a small core of attenders.

"Most venues hold thousands of records of people who attend irregularly or who have lapsed. Their lack of attendance makes it uneconomic to mail them. This lack of communication makes them even less likely to attend. Many theatres 'clean' these potential attenders from their lists…This 'direct mail myopia' actually under-develops potential audiences, limits potential income and curbs potential artistic ambitions. Current arts marketing uses only a fraction of box office potential"

- Just getting some existing bookers to purchase one extra ticket in the same year for a play will make a big difference to expanding the audience. South East Wales and North East Wales have the largest share of ticket sales and could lead the way for testing initiatives for increasing frequency as a pilot exercise before rolling out elsewhere. These could include ticket offers, consistency of drama programming across the seasons, or membership schemes, for example.

- While funders have ambitions for organisations to reach a broader cross section of the population, audience development takes time, resources and expertise that may organisations cannot afford to invest. To fully realise the potential found in this study, venues and companies should concentrate, in the shorter term, on increasing frequency and converting 'lapsed' attenders back to attenders within a strategy that builds relationships with audiences. Funders and venues / companies then need to agree a marketing approach that uses resources effectively and establishes realistic audience development targets over time in line with an organisation's aims and catchment area.

Audience development

With many venues working with limited budgets and staff resources, the research suggests there is little capacity to engage in strategic audience development, as opposed to campaign work for individual events. Correspondingly, there appears to be a lack of clearly written strategies for drama. In some cases, there is confusion between targeted, long term audience development and publicity.

- It is frustrating that the sector has been talking about similar issues to do with pressures of work and lack of resources for a long time, and yet staff remain under these same pressures today. Venues and companies bear some responsibility as they are making decisions about how to spend their resources. ACW also needs to look at ways it can help support marketers and programmers and recognise successful working practices that could be adopted by others in the sector. For example, additional funding could be made available to support audience development initiatives, the results of which could then be published and circulated to assist other organisations.

- Given the limited budgets, venues need to decide on one or two key priorities for audience development appropriate to that venue's needs. For most, it is not currently possible to look at audience development across the board. When it comes to drama, there is no 'one size fits all' solution; approaches need to vary according to type or size of venue, location, the amount of drama in the overall programme, etc.

- There are tools already available to help with audience development. Using the Area Profile Reports for targeting marketing activity in postcode sectors stronger for play attenders, by cross-referencing with a venue's mailing list, distributing print to identified outlets and targeting door-to-door distribution (including localised media) is recommended.

- Consider targeting different types of plays by Mosaic group by using postcode information, for example:

  - Some of the Mosaic groups that are attracted to drama have a safe outlook on life i.e. Happy Families, Blue Collar Enterprise, Ties of Community – they want to be confident that they will have a good time before exchanging cash for a theatre ticket. This ties in with the risk averse findings in various phases of the research.

  - Welsh language amateur theatre attracts more blue collar Mosaic groups which, in part, is due to the nature of certain regions in Wales.

  - Urban Intelligence and Symbols of Success tend to be strong arts attenders but represent a relatively small percentage of households in Wales. They could be regarded as niche audiences and need to be properly targeted.

- Audiences Wales should continue to provide advice and support on using tools such as Area Profile Reports and Mosaic profiling and segmentation.

- Training is crucial to build understanding of how to fit audience development into venue and company work patterns and help avoid a 'fire fighting' approach. Training is widely available but can be expensive to deliver or to attend, or relies on short-term funding. ACW should consider a long-term investment that seeks to expand and develop marketing skills in the sector through cohesive, subsidised training programmes and perhaps recognised qualifications in partnership with the Sector Skills Council or Chartered Institute of Marketing, etc. There needs to be a structured approach to continuous professional development, with ACW incentivising people who update their skills and knowledge.

- Associated with this, guidance on strategic planning needs to be facilitated for senior managers, perhaps linked to ACW looking at how it communicates and encourages people to work to its strategies.

- In addition, organisations need to recognise that they need to invest in their marketing staff and budgets if they wish to build audiences. ACW need to consider making it a Key Performance Indicator for its clients to have a marketing budget (excluding staff costs) equivalent to at least 5-10% of an organisation's turnover.

- The research suggests that the sector would benefit from a focussed, long-term, strategic and well-resourced profile-raising public arts campaign to support the sector and develop a theatre-going culture in Wales. ACW / WAG could consider funding such a campaign, which should aim to develop confidence and understanding in audiences and provide support for venues and companies to further their strategic development and audience development strategies.

Relationship between venues and companies

It is more straightforward for venues to carry out their marketing campaigns since they hold the box office data about their audiences. They are also more likely to be familiar with their catchment area. The company may only tour sporadically to that venue and it should therefore be the responsibility of the venue to inform the company about potential audiences at that venue and the most likely marketing methods to be successful. The duty of the company is in a sense more product focussed in terms of needing to communicate to the venues the nature of the production and the audience experience, highlighting potential selling points which may appeal to audiences. However, many companies want a closer relationship with their audiences and this means finding a way for venues and companies to share their data.

- In general, there is a need for venues and companies to plan more strategically and communicate more closely, in the areas of both programming and marketing. The study found some very successful examples of co-producing relationships (most notably that between Theatr Mwldan and Mappa Mundi), and it is recommended that other venues and companies consider co-producing to develop audiences for drama.

- Venues need to provide more audience data to companies to empower them to take more of a role in marketing their productions and develop a better understanding of their audiences.

- Another priority for the companies is to develop an annual marketing strategy to promote the company and help develop a relationship with audiences outside an individual show. This could include the aim to build up their own database to communicate with audiences even when they are not touring to a particular venue.

- There appears to be some misinterpretation of the Data Protection Act, and policies in some venues need to be reviewed. The Act covers the collation and use of personal data and how it is processed and stored; it does not imply 'ownership' of that data. The *Delivering the Potential* section, later in this report, offers guidance on how to comply with the Data Protection Act while allowing for customer data and analysis to be shared between venues and companies. It is recommended that the report Data Ownership Guidelines (2005) by Roger Tomlinson and Tim Baker be adopted by ACW and contractual agreements between venues and companies be promoted within funding agreements to support collaboration between organisations and the development of audiences.

- ACW need to encourage data sharing within the sector and promote a culture of synergy between venues and companies because of the long-term development opportunities this would create; for example, through encouraging co-producing relationships ('collaboration' funding) or making sharing of data a condition of funding.

- Creu Cymru and WAPA should continue to develop opportunities for venues and companies to come together, such as Speed Dating events. Supported by ACW, these organisations also need to look at co-ordinating the dissemination of good practice, such as successful co-producing initiatives which help develop drama audiences by sharing resources and knowledge.

Drama programming strategy

There is a lack of drama product in Wales, coupled with a touring pattern of one or two night runs. Within this context, many venues are trying to build up their drama programming and audiences gradually. These factors, together with inconsistent funding, have led to sporadic programming that is hampering the development of sustained audiences for drama.

- Venues are understandably reticent to risk longer runs of drama, yet it is clear that the resulting loss of momentum causes problems for companies and audiences. Further analysis of the availability of drama product in Wales could be undertaken by Creu Cymru to identify and quantify regional and type of drama gaps, and prioritise areas for development.

- There also needs to be support for venues to encourage them to take 'riskier' product, such as new writing, backed up by marketing support to help them build the audiences for it. ACW should review investment in producing budgets and programme support for drama.

- There are clearly differences between the venues when it comes to drama programming. Certain larger venues which programme drama more regularly, and have therefore built up bigger databases of drama attenders, could lead on any new Wales-wide initiatives to boost the profile of drama, such as the profile-raising campaign suggested for ACW above.

- One approach which has been adopted in other parts of the UK, and which may prove helpful, particularly in South East Wales, is the idea of venues having programming specialisms. This collaborative working involves venues taking a larger proportion of a certain art form, which helps reduce the potential for programme clashes and builds up an audience for that type of product. The venue becomes associated with that art form, giving a branding benefit which lends credibility to the product and an internal focus which could in time encourage a certain degree of informed risk taking. Venues would then be able to share their knowledge to support each other across the art form range. This may in turn help to alleviate some of the stresses on venue programmers and marketers.

- It is so important for marketing staff to know what they are selling. Creu Cymru needs the resources to continue to invest in the Go and See scheme, which is an invaluable tool for informing venues about product and how best to sell an event. Venue staff should be given every support to attend plays via this scheme.

National Theatre of Wales

Views on the National Theatre of Wales were generally positive. 97% of drama attenders and 80% of non-drama attenders would be interested in seeing its productions.

- Drama attenders would prefer to see a broad range of productions from NTW. A third would like to see traditional / classical plays. 14% were interested in new writing.

- Non-drama attenders' preferred productions for NTW were also a broad range, but they specified more of a 'lighter' experience, wanting to be entertained. Nearly half would like to see comedy plays. 6% were interested in new writing.

- The study underlined the importance of how new or challenging work is communicated to audiences. Some work will inevitably have a minority audience. Mosaic profiles would be useful to help pinpoint these niche groups across Wales.

- There was general support, although a couple of venues were wary, for the idea of giving performances in unexpected and unconventional spaces, especially as this was felt to be a good way to reach non-attenders. Theatr Bara Caws are already having great success with a range of productions in community venues and would be an interesting model for NTW to observe.

- It was also felt to be important that productions had a Welsh cultural perspective, whether in themes, stories or actors.

This study showed marked similarities with one carried out by Glasgow Grows Audiences in 2006 for the National Theatre of Scotland, where people felt a broad range of productions should be offered, that the company should get out to local communities and work to encourage involvement and attendances from young people. There was also agreement between the two studies that a national company needed to start with more 'mainstream' productions to build up a loyal audience base and introduce more unknown work later once trust in the company had been established.

Areas for possible further research

- Non-attenders / those going to local community venues, e.g. Theatr Bara Caws productions. Audience profiling, investigating what they like about those productions, possible motivators to attend drama at theatres / arts centres.

- Rest of UK – further consultation with venues, companies and producers to investigate how the situation with drama may compare there and sound out some of the key issues that have arisen from this study.

- New writing – specific analysis of these productions over the last few years, using Knowledge box office data. Follow-up research with attenders of these productions, looking at profiling, motivations and communication methods.

- The effectiveness of new technologies, including using web communities to build audiences and a comparison between rural and urban environments, monitoring and evaluating models of success and disseminating the results to the sector.

Summary of key recommendations

Venues

- Focus on improving data capture rates at box office
- Use The Knowledge data to monitor tends and ticket sales for drama
- Look at increasing the frequency of drama attendance by infrequent attenders on the box office system
- Focus on converting lapsed attenders back into attenders, perhaps using Audience Builder or Katy Raines retention projects
- Concentrate on one or two key priorities for audience development rather than trying to consider across the board
- Aim to provide more audience data to companies
- Continue to support marketing staff to go and see forthcoming and potential productions wherever possible

Companies

- Prioritise building own audience databases
- Develop an annual marketing strategy to promote the company and help develop a relationship with audiences outside an individual show.

Both venues and companies

- Focus on the 'story' in publicity and on portraying an accurate picture of the play
- Emphasise any familiar points about the production
- Continue to monitor and evaluate marketing activity
- Use Area Profile reports to assist in targeting marketing activity
- Consider using Mosaic[12] to target different audiences for various types of plays using postcode information
- Venues and companies need to plan more strategically and communicate more closely. If possible, co-producing partnerships should be considered to develop audiences for drama.
- Review how contracts between venues and companies are worded to enable data sharing

Key recommendations for ACW

- Review investment in producing budgets and programme support for drama
- Facilitate guidance on strategic planning for drama for senior managers, perhaps linked to ACW looking at how it communicates and encourages people to work to its strategies
- Encourage greater data sharing within the sector and promote a culture of synergy between venues and companies because of the long-term

[12] Further information on Mosaic can be found in Part 2 of this Report (Phase 1 section)

development opportunities this would present; for example, through encouraging co-producing relationships ('collaboration' funding), adopting the Data Ownership Guidelines report by Roger Tomlinson and Tim Baker and promoting collaborative contractual agreements between venues and companies within funding agreements

- Consider funding a focussed, long-term, strategic and well-resourced profile-raising public arts campaign to support the sector and develop a theatre-going culture in Wales
- Associated with this, promote scheme to encourage infrequent or lapsed attenders to increase frequency of drama consumption
- Look at ways to support marketers and programmers and recognise successful working practices that could be adopted by others in the sector
- Consider a long-term investment that seeks to expand and develop marketing skills in the sector through cohesive training programmes and perhaps recognised qualifications in partnership with the Sector Skills Council, CIM, etc.
- Consider making it a Key Performance Indicator to have a marketing budget equivalent to 5-10% of an organisation's turnover

Key recommendations for other organisations

- Creu Cymru and WAPA should continue to develop opportunities for venues and companies to come together, such as Speed Dating events. Supported by ACW, these organisations also need to look at co-ordinating dissemination of good practice, such as successful co-producing initiatives which help develop drama audiences by sharing resources and knowledge
- Audiences Wales should continue to facilitate marketing networking via its Connect meetings and other fora to share examples of best practice and cross artform initiatives
- Further analysis of the availability of drama product in Wales could be undertaken by Creu Cymru to identify and quantify regional and type of drama gaps, and prioritise areas for development
- Audiences Wales need to continue to communicate the value of The Knowledge as an objective tool for monitoring trends in provision and ticket sales
- Audiences Wales to continue to provide training and skills development, such as advice on using Area Profile reports and box office data capture
- Creu Cymru need the resources to continue to invest in the Go and See scheme, which is an invaluable tool for informing venues about product and how best to sell an event
- Audiences Wales (supported by ACW and Creu Cymru) to make all parts of this report and relevant resources available via their website

Delivering The Potential

Developing audiences for drama so that theatre is a "must see" for ever greater numbers of people in Wales[13] involves recognising that audience development is a planned activity. The study has highlighted how, on a tactical level, selling tickets for drama compared with other artforms is more demanding in terms of advance planning, and that this planned approach is needed to meet the strategic objective of attracting greater numbers of people to Wales to see plays. The need for a strategy for developing audiences for drama is especially acute in a sector with limited marketing resources in terms of budgets and staffing. Having a written strategy for developing audiences for drama will help to clarify priorities and assist effective planning in order to meet objectives.

It is worth reminding ourselves of the definitions of marketing and audience development. The fundamental role of marketing is to develop an organisation's aims by understanding and reaching an audience. Audience development is a way of expanding and broadening audiences and, like marketing, the purpose is to fulfil an organisation's objectives, whether they are artistic, financial or social, or a combination of two or more.[14]

There is no 'one-size fits all' approach to developing audiences for drama for the sector in Wales. Deciding which strategy to purse will depend on a venue's programme, profile of their audiences, catchment areas, and priorities:

- Some venues will have a large database of customers across the whole of their programme, or particularly for plays. These venues can consider strategies for increasing frequency and crossover from other artforms.

- A venue may be located in a catchment area where there are people who do not currently attend but have similar characteristics to existing customers and, therefore, have the potential to attend.

- There will be venues who wish to include new artistic strands to their programme, perhaps by the type of plays that are programmed, and will want to target both existing and new audiences for this new work.

[13] Arts Council of Wales' Theatre and Drama Artform Strategy 2008-2013
[14] See Audiences Wales' Learning on Demand - An Introduction to Marketing and Publicity www.audienceswales.co.uk/Resources/Marketing

- There will be those venues that will struggle to develop audiences for drama because of their catchment area or the small amount of drama they have traditionally programmed which will find it more difficult to develop audiences for drama.

The following pages contain tools and resources to address some of the recommendations in this report:

- Developing drama audiences: report highlights
- Marketing Planning
- Audience Development
- Audience Development Strategy
- Campaign Planning
- Customer Retention and Building Frequency
- Area Profile Reports
- Data Protection Act Guidance
- Data Sharing between Venues and Touring Companies
- Monitoring and Evaluation

We have highlighted those ideas which we consider will help to make a big difference with developing audiences for drama for the sector as a whole. There are arts organisations in Wales that are implementing some of these tools very capably, but others need support to understand their audiences, define their strategic direction and reach their potential.

The matrix overleaf outlines the process needed to use these tools and resources to build a customer focused marketing approach for developing drama audiences. Reference is also made to resources available, free of charge, on the Audiences Wales and Arts Council of Wales websites.

Priority Areas	**'Identifying the Potential' Report Resources**	**Resources available on Audience Wales website**
Who are you?		
Define your **values, aims and mission**. These define your brand and inform your future strategies.	• Marketing Planning	• Learning on Demand Marketing Guide (including branding and positioning) • CIM Branding guides • Strategic Marketing Planning template • Learning on Demand Research Guide
Understand your audiences and catchment area		
What do you know about your **actual audiences**?	• Mosaic profile of catchment areas • Box Office analysis • Research findings	• ACW Area Profile Reports • Learning on Demand Research Guide
What information can you gather together to define your **potential audiences**?	• Developing drama audiences report highlights • Phase One and Two report findings • Drama audience Mosaic profiles • Mosaic Geographic analysis	• ACW Area Profile Reports Guide See also: • ACW Arts In Wales Survey report available on www.artswales.org.uk
What do you want to achieve?		
Draw together your artistic aims and knowledge of your audience / potential audience and define your **objectives**. Share your objectives with companies / venues that support your work and can contribute to the development of it.	• Marketing and Audience Development strategies • Consider collaboration opportunities and relationship with venues / companies	• Strategic Marketing Planning Template • Learning on Demand Marketing Guide See also: • Marketing and Touring: A Practical Guide to Marketing an Event on Tour by Heather Maitland, available on www.artscouncil.org.uk

Priority Areas	**'Identifying the Potential' Report Resources**	**Resources available on Audience Wales website**
How will you achieve it?		
Develop a core **strategy** to promote your company / venue and brand, and deliver your objectives throughout the year to audiences, supporters, staff and funders.	• Campaign planning	• Learning on Demand Marketing Guide • Learning on Demand Media & Public Relations Guide See also: • Marketing and Touring: A Practical Guide to Marketing an Event on Tour by Heather Maitland, available on www.artscouncil.org.uk
Take stock of your current **tactical marketing and publicity** approach for your productions. Are you reaching the right audience with the tools that they respond to? Use your understanding of your audience / potential audience and your product to establish tactics that suit your audience and fit within your budget.	• Phase Four findings (audience research) • Campaign planning • Customer Retention and Building Frequency • Develop database / increase data capture recommended • Creu Cymru 'Go and See' initiative recommended	• Learning on Demand Marketing Guide (including Publicity Toolkit) • Learning on Demand Media & Public Relations Guide • ACW 'Boost' Marketing Planning Guide • Learning on Demand Design Guide
Invest in the **resources** necessary to achieve your objectives including budgets and staff roles and training.	• Marketing budget at 5-10% of turnover (excluding staff costs) recommended	• CIM Professional Standards and Competencies • See Learning on Demand Guides and Training resources
Invest in a **relationship / dialogue** between companies and venues; share knowledge, objectives, strategies and resources. Establish basis of relationship and data sharing agreement.	• Phase Three findings • Marketing planning • Data Protection Act Guidance • Data Sharing Guidance • WAPA / Creu Cymru collaboration initiative	• Data Ownership Guidelines
Did you achieve it?		
Monitor and evaluate the achievements of your campaigns to promote your company and specific productions. Did you achieve your marketing and audience development objectives? Use the results to inform future strategies.	• Marketing and Audience Development strategies • Monitoring and Evaluation	• Learning on Demand Research Guide

Developing Drama Audiences: report highlights

Drama attenders

Profile

- Likely to be older
- More likely to be retired, more time, children grown up
- Higher social grades, especially AB

Marketing

- Aspects to stress in publicity to drama attenders: all the positives of a live performance, the atmosphere, the shared experience, the escapism, the interplay between the audience and the actors
- Reviews, well-known cast, reputation of director less important to this market (though not unimportant).
- 65% say they like attending newly written plays, so people are open-minded, but in reality, venues can find it difficult to sell this type of event. The door is half open but it could take a lot to get it fully open. The title of the play and recommendation of friends and family are still going to be important.
- Crossover with museums, galleries, classical music, cinema, amateur shows, comedy, musicals.
- Preferred radio stations – Radio 4, followed by Radio Cymru and Classic FM

Non-drama attenders

Profile

- Likely to be younger than drama attenders
- More likely to have young children which limits their going out
- Broader range of social grades, especially C1s

Marketing

- Not averse to drama, but need to be persuaded to give it a try over their more preferred art forms (comedy, museums, cinema, pop music). 38% said they kept meaning to go to a play but never got round to it.
- Importance of using the right language when selling drama and reassurance about familiarity.
- These attenders need to be persuaded that a play is a must-see event, even if it is not something they would normally choose to go to.
- 'Acclaimed' production, familiar title, well-known actor likely to appeal to this market.
- More likely to go for children's choice or 'family' choice.

- They are more likely to be encouraged by the inclusion of more familiar elements such as music or comedy in the play and by reassurance that it will be entertaining.
- The study also showed they are more likely to be influenced by positive press reviews.
- Special ticket offers would appeal to this market.
- Word of mouth as important a marketing tool as the brochure.
- Preferred radio stations – Radio 2, followed by Radio 4 (half as many as the drama attenders) and Radio Wales.

For all attenders:

- Tell the story
- Find the familiar hooks
- Endorsement from peers or media

➢ Bookers of Classical Plays in either language show high crossover with English language Contemporary Plays. Experimental Theatre bookers and Welsh language Classical Play bookers show quite a high crossover with English language New Writing. Generally, bookers attending New Writing events or Welsh language drama cross over more widely to other drama categories.

➢ English contemporary plays and English classical plays have a higher percentage of more frequent bookings than other drama types, followed by Welsh contemporary plays.

➢ Mosaic groups *Suburban Comfort, Symbols of Success* and *Ties of Community* showed the highest levels of drama attendance in 2007/08. Clearly some venues will be better placed than others to capitalise on these groups, but analysis of the venue's database should indicate where these types of attender are likely to be. It should be noted that Wales has a lower percentage of households belonging to *Suburban Comfort* and *Symbols of Success.*

➢ Wales has a higher percentage of households belonging to Mosaic groups *Ties of Community, Blue Collar Enterprise* and *Rural Isolation*. Community/amateur theatre in either language and Welsh language contemporary plays therefore have an advantage by being the more popular types of drama with these groups.

➢ Welsh speakers are more likely to attend plays in either language, so areas with a higher proportion of Welsh speakers could be better prospects for drama attendance.

Marketing Planning

Marketing focuses on the fundamental elements of your organisation; your products and services, how you deliver them, who your customers are and what their needs are, and how you communicate. Critically, marketing is concerned with reaching the right audiences with the right product in the right way at the right time. To do this a co-ordinated and realistic Marketing Strategy should form a key part of your business planning process.

A Marketing Strategy starts with an assessment of your market by geography, audience segments, competition and other factors and trends that might influence your potential audience or affect your business. These would include an honest assessment of your organisation's strengths and weaknesses and the products or services you intend to produce. This is often called a Marketing Audit and forms the backbone to your business planning.

Your strategy draws on the information found during the Marketing Audit process and helps you define achievable objectives that fit with your organisation's financial, social or artistic aims that can be delivered within your budget.

A Marketing Strategy is therefore linked with your business planning process as it is concerned with everything you do (The 7 Ps). Much of the information needed in a Marketing Audit and Marketing Strategy is likely to be available within your organisation. The benefit of producing the plan, however, is that it enables you to share and test your assumptions and ultimately communicate your organisation and its strategy to colleagues and stakeholders. Similarly, the written strategy can also then be measured, tested and monitored, so that it is realistic, achievable and grows over time.

However, understanding your audience may require additional, external information that can be found through statistics and data and / or market research. To really understand your audience and potential audience some form of market research may be required.

An overview of the strategic planning process is therefore:

- An audit of your organisation
- Understand your products / services
- Understand your audiences / potential audiences

- A realistic assessment of your strengths and weaknesses
- Defining your organisation's aims
- Setting objectives to achieve your aims that are realistic, achievable and measurable that address your whole organisation
- Producing a plan to deliver your objectives that can be shared and communicated to all stakeholders

A Marketing Plan template is available on the Audiences Wales website.

Audience Development

Audience development is a broad concept and essentially is about expanding and broadening audiences. For example:

- Improving audiences' understanding of the arts
- Increasing the number of attenders or participants
- Increasing frequency of attendance
- Working with organisations in other sectors to tackle social exclusion

All these activities are audience development.

Organisations can get confused about audience development as various departments will have different views. Arts Council England research has identified three main approaches to audience development:

- Education workers like to focus on the quality of the participant's educational experience and the development of their understanding of the arts. Some of the benefits may be broad and long-term e.g. 'creating the audience of tomorrow'
- Artists tend to focus on improving audiences' understanding of their work, often concerned with finding 'the right audience' who will best appreciate their work
- Marketers aim to affect a change in attitudes, understanding and behaviour of both existing audiences and non-attenders. These projects tend to be carefully targeted at specific groups of people and have clear objectives.

Again, all of these are valid approaches.

The starting point for planning audience development is the organisation's own goals and understanding of their current audiences.

Some of the options available:

- **Concentrate on developing your audiences' relationship with events your organisation offers at the moment** e.g. targeting people who have stopped attending, encouraging audiences to something different, persuading them to come more often, etc.
- **Develop new events for existing audiences** e.g. introducing new programming
- **Develop new audiences for existing events** e.g targeting areas with a similar profile to existing customer base

- **Develop new audiences for new kinds of activities –** a riskier option which needs significant investment of time and money from everyone in the organisation.

These options are described in the Ansoff Growth matrix which is a tool that helps businesses develop their product and market growth strategy. The Ansoff's matrix suggests that a business' attempts to grow depend on whether it markets **new or existing products** in **new or existing markets**.

Audience development involves breaking down the physical, psychological and social barriers that stop people participating in and attending the arts. Lack of relevant information is also a very basic barrier to attendance.

The implications:

- As many venues are under-resourced they need to choose carefully which audience development strategy they wish to pursue, prepare a marketing plan, and include targets, timescales, monitoring and evaluation. Concentrate on one or two options rather than spread yourself thinly.

  It's commonly known that it's a lot more difficult to recruit new customers than concentrate on existing or lapsed customers. Therefore, if venues wish to target new attenders, they have to be serious about the resources (time, staff, and money), make the commitment and do this properly.

So, starting with the customers they already have on their database:

- Look at the characteristics of the people who are already attending – are they attracted to a particular style of work, do they live in certain postcode areas? How much crossover can you expect within the artform or from other artforms? Should you target lapsed customers?

Those people with a similar profile but don't currently attend:

- Use the profiles of existing customers (e.g. Mosaic or postcode sectors), to see if you should be targeting people from these groups/sectors who don't currently attend. Cross-check with area profile report to see if hitting potential or if there is scope to attract more people.

Audience Development Strategy

Developing a strategy will help you communicate, monitor, and evaluate your Audience Development aims within your organisation and with external partners and funders. The strategy may form part of your marketing and / or business strategy, or may be a separate document. Whichever approach is appropriate for you, the following is a suggestion of what an Audience Development strategy may look like:

- Organisation's aims (artistic, financial, social)
- Current activity and understanding of current audiences
- SWOT analysis
- Market place / potential audience analysis (what do you know about people who do not attend your events? This will be informed by your knowledge of current audiences and information available from within Wales – Area Profile reports, etc)
- Audience Development targets (what do you want to do that is relevant to your aims, activities, audiences?)
- Activity plan (inc. timescale, resources, etc) (how do you intend to do it?)
- Key performance indicators (what will you monitor?)
- Monitoring and evaluation process (how will you know it was successful?)

Campaign Planning

While marketing as a whole contributes to the effectiveness of your organisation and its work, a specific tactical approach will need to be used to reach and communicate with particular audiences and potential audiences. The approach you take and the techniques you employ will depend on your aims, your audience, and your organisation's capacity. You may also need to employ a different style, tone and language depending on who you are communicating with and the method of communication used.

The study has demonstrated to plan your publicity campaign it is important to understand the 'product' (the event, exhibition or show, for example) and the audiences you are trying to reach.

Some facts about your event may well be selling points (your name and reputation, the show title, author, artist, etc) but the other elements that will persuade someone to attend need to be defined on the basis of what benefit they may have to the audience member.

To define your event, firstly write down a list of features (facts) and then try to identify the benefit to the audience, for example:

Features	**Benefits**
Known author	quality reputation
World premiere	be the first to see it
Live orchestra	hear the music as it was intended
Small venue	intimate setting

Then identify your target audiences – who has attended similar events in the past, what do you know about them / can you identify similar people, would it suit children / schools, would the subject matter attract a specialist group, who lives near the event, etc. Research your possible audiences and identify those that are more likely to attend (core audience) and those that may need more persuasion.

For more on developing a campaign to reach a target audience and the publicity toolkit see Audiences Wales' Learning on Demand - An Introduction to Marketing and Publicity (www.audienceswales.co.uk) and the Arts Council of Wales' Boost Your Performance - Writing Your Marketing Action Plan (www.artswales.org.uk).

Also see Audiences Wales' website for 'The Golden Rules of Persuasive Copy Writing' by Morris Hargreaves McIntyre on the crucial role of communications to connect and engage audiences. This also emphasises looking at objectives, key selling points, benefits to the audience and the experience of the performance.

Customer Retention and Building Frequency

Generally speaking, for many products and services it is easier to get existing customers to try new products, as they already have a relationship with you and a sense of familiarity and (for some) trust for your organisation.

The box office data held by theatres and arts centres is a goldmine and can be used to help with developing audiences. Adopting a Customer Relationship Management (CRM) approach will help with developing audiences for drama, especially more artistically-challenging work.

Retaining customers will help to expand your database of potential customers to try new or other elements of your programme. You will have attenders who are more loyal and committed who may act as advocates for you and possibly even take artistic risks.

Katy Raines' Audience Loyalty Healthcheck (2006) found that within arts organisations a retained customer is worth twice as much as new bookers regardless of ticket pricing or venue size. Just a 5% improvement in customer retention can add as much as 25% to ticket income.

The table summarises the differences between 'traditional' marketing and the more planned and long-term approach of 'relationship' marketing.

Transaction marketing	Relationship marketing
Focus on single sale	Focus on customer retention
Focus on product features	Focus on product benefits
Short time-scale	Long time-scale
Little emphasis on customer service	Large emphasis on customer service
Limited customer commitment	High customer commitment
Moderate customer contact	High customer contact
Quality is concern of only some in organisation	Quality is the concern of all in the organisation

The focus of CRM is to build a relationship with a customer over time and to concentrate on the most profitable customers.

Venues can segment their customers in their box office system by, for instance:

- **Retention** Looking at how many customers you are keeping e.g. from one year to the next?

- **Frequency** How often are they coming?
- **Value** How much do they spend?

Katy Raines provides examples of how arts organisations can move their customers up the loyalty ladder by using different techniques. For example, a new attender can be considered for various welcome strategies e.g. ‘morning after mailings’, time limited promotions; an irregular attender may be offered a small reward for an increase in commitment.

Some organisations may worry about the cost of implementing a Customer Relationship Management approach. A long-term view needs to be taken. The brochure is usually the most expensive element of a venue’s marketing budget. It may be possible to make some cost savings by being more selective about who to mail your brochure to (generally speaking, more regular attenders are more likely to book from the brochure).

Lastly, don’t forget those lapsed bookers. You probably have hundreds or thousands of people who have not booked for a long time. They also represent a group of customers who have a relationship with you, even if it’s some time ago. Again, by careful analysis of your lapsed bookers you may be able to re-kindle a relationship through a suitable mailing. And remember, sometimes an organisation’s definition of a lapsed customer will differ from that of the customer. Research has shown that someone who attends every 2-3 years, may consider themselves a regular attender.

Also, consider ‘Audience Builder’ by Morris Hargreaves McInctyre, another audience segmentation tool, for encouraging frequency and attendance at different arts events ranging from ‘safe’ to ‘more challenging work’ using a venue’s box office data.

Area Profile Reports

These reports can be used to identify potential attenders who do not currently attend with a similar profile to existing customers, as well as to targeting entirely new audiences.

One way of using the reports is to identify postcode sectors where there is potential to attract more people. Compare ticket sales or number of customers in each sector against the potential number of arts attenders from the Area Profile Report. This analysis will help you to assess the degree of success, or not, that a venue has had with penetrating the drama attender potential in each postcode sector. An analysis of postcode sectors on this basis will show:

- Sectors of high market potential and high sales penetration
- Sectors of high market potential but with only average or below average sales penetration
- Sectors of average potential but below average sales penetration
- Sectors with low potential and low sales penetration

For example:

	Venue Data		Area Profile Report Data	
Postcode Sector	Number of ticket buyers	Percentage of ticket buyers	Number of arts attenders	Percentage of arts attenders
NE12 1	200	22.2	1,919	46.9
NE12 2	300	33.3	1,115	27.2
NE12 3	400	44.4	1,061	25.9
TOTALS	900	100.0	4,095	

This table shows that NE12 1 represents the best postcode sector for potential attenders, even though the venue already has 200 ticket buyers from this sector, as there are as many as 1,919 arts attenders that live in this sector, indicating there is potential for the venue to attract some of those who do not appear on the venue's database.

An assessment should be made of the factors that might be causing low sales in postcode sectors of high potential.

For example:

- Drive-time distance from the venues
- Poor access by public transport

- A low level of travel into the town for shopping, work or leisure, or perhaps another town is preferred
- Relatively low car ownership
- Competition from other theatres, arts venues or other places of cultural interest or entertainment which have greater appeal or are more accessible
- Relatively low levels of family income
- Limited potential for group bookings because of a lack of appropriate places of employment, clubs, societies, etc
- Relatively low coverage by the venue's current marketing and publicity (i.e. small numbers of people on the venue mailing list, a low level of distribution for leaflets and posters, lack of coverage by local press)

Mosaic

Mosaic is a geo-demographic segmentation system (similar to Acorn). Geo-demographics combine geography with demographics and lifestyle information, indicating places where people live who tend to share similar characteristics and behaviour.

The classification creates a tool for understanding the different types of people in different areas throughout the country and is based on people's full postcode. Every full postcode in the UK will be classed as a Mosaic type.

Mosaic can help your marketing by:

- Providing an insight into your key customer groups
- Comparing the make-up of your customer base to the general population in your area
- Identifying customer groups that offer potential for increased sales

Things to look out for:

- Which are the largest MOSAIC categories or groups amongst your customer base?
- What are they like? What are their interests? What are their media options?
- Are they typical arts attenders? (Look at the detailed profile information on each Mosaic group)
- How does this compare to the largest Mosaic group amongst the local population?

The table overleaf shows the potential for attracting drama bookers for different Mosaic Groups.

Mosaic Group	Number of Households in Wales	Number of Drama Household Bookers 2007/08	Difference i.e. number of non-bookers households
Symbols Of Success	66,619	7,959	58,660
Happy Families	116,384	7,819	108,565
Suburban Comfort	140,395	6,233	134,162
Ties Of Community	255,732	4,856	250,876
Urban Intelligence	46,339	3,923	42,416
Welfare Borderline	34,032	3,779	30,253
Municipal Dependency	103,717	3,495	100,222
Blue Collar Enterprise	207,786	3,020	204,766
Twilight Subsistence	43,401	782	42,619
Grey Perspectives	129,670	596	129,074
Rural Isolation	137,599	381	137,218
Total	**1,281,674**	**42,843**	**1,238,831**

A venue can decide which of these groups it wishes to target depending on the Mosaic groups that predominate in its catchment area, the Mosaic profile of its existing customers and the appeal of its artistic programme to the different groups.

More information on Mosaic can be found in Part 2 of this report (Phase 1 section), including the Mosaic profile for different regions in Wales, maps of Wales, a description for each Mosaic group and an example of how a venue in Wales used Mosaic for running a marketing campaign.

Data Protection Act Guidance

The Data Protection Act covers the uses that can be made of personal data, and how it is processed and stored. It does not imply ownership of data and therefore the control of it. In essence the Act seeks to give people the opportunity to give their consent to use their data and protect them from being mis-sold or receiving unsolicited communications.

During the transaction at the time of data capture, the customer should be notified of what will happen to their data and permission should be obtained to use it for any clearly defined communication methods and seek permission to share it.

Organisations should be registered with the Information Commissioners Office, although there are limited exceptions for some organisations including, under certain conditions, not for profit organisations. If you think your organisations may be exempt, you should seek legal advice.

Every registered organisation must have a written 'fair processing' statement. The statement should be clear and available to customers (at Box Office, on your website, on data capture forms, etc).

'Fair processing' statements require that the customer is told who is holding their data, who it will be shared with and what purposes it will be used for, and that the customer is given the choice to opt-in (rather than opt-out). This gives 'informed consent'.

'Informed consent' only has to be handled on the **first** capture of a customer's details but must cover all data requested or provided (e.g. postal address, telephone number, email address, etc). The customer must also be told how to remove their data or change their consent.

Data can be captured without informed consent when the data is used for a transaction and it is reasonable to do so. For example, when a customer buys a ticket at a Box Office it is reasonable to take their name, address and phone number so they can be identified and contacted if the performance is cancelled. This data cannot be used for any other purpose without informed consent having been given.

There are no data protection issues involved in sharing de-personalised (or some say 'anonymised') data which do not enable identification of named individuals or contact details such as postal or e-mail addresses or phone numbers. For example, postcode and other analysis can be processed and shared with others if the customer is anonymous and therefore cannot be identified.

Some of the major touring companies e.g. Welsh National Opera, have established written arrangements with the presenting venues they visit for sharing data. In this type of partnership the touring company and presenting venue agree their joint responsibility for protecting customer data and inform their customers of the arrangement and ensure they receive their informed consent. Both parties agree that each would be a Data Controller for contact data captured on attenders for a particular visit i.e. "dual key" control. This type of arrangement needs to be discussed at contract negotiation stage.

For more information see:
Information Commissioners Office (www.ico.gov.uk)
'Data Ownership Guidelines' by Tim Baker and Roger Tomlinson
(www.audienceswales.co.uk or www.aduk.org)

Data Sharing Between Venues and Touring Companies

A report produced on 'Data Ownership Guidelines' by Tim Baker and Roger Tomlinson for Audience Data UK[15], sets out recommendations for sharing data for audience development and arts marketing purposes.

The report explains how Data Ownership is a contractual matter to be agreed between venues and touring companies at the time of engagement, as part of agreeing the terms for the presentation or exhibition.

Since the Data Protection Act of 1998 impacts on data sharing but does not legislate for data ownership, it is necessary for the presenting partners to legalise their ownership of data on their customers, since this determines what it can be used for and by whom. **A short written agreement between the parties or a standard clause in their contract for the performance is required.**

If the presenting venue is not the sole outlet for sales, such as when tickets are sold through ticket agents, both parties will want to ensure that the separate contract with the ticket agent(s) specifies that data is owned by them in partnership.

This written agreement is the place where the partnership is established for the presentation, with the parties to the contract clearly setting out their responsibilities for marketing, for recruiting attenders, and for sales. Who owns and controls the data on customers, past and future, will determine who can do what in terms of marketing and audience development action.

The report sets out the necessary wording for the contractual agreements depending on the uses of the data (pages 14-17).

(Please note that these guidelines have been piloted and refined and that ADUK will be publishing a revised clause for contracts between venues and touring companies.)

[15] www.aduk.org/resources/data-ownership-guidelines

Monitoring and Evaluation

So how did you do?
Is it a good and effective audience development strategy for you?

If arts organisations are pursuing strategies to develop audiences (in whatever way they have chosen), they will need to evaluate these strategies and check they have been successful at attracting new audiences or enhancing the audience experience. At the end of the day, quite simply, you need to answer the question 'Did it work?'

Monitoring is about collecting information about what is happening while it is happening.

Evaluation involves putting a value on the work. It is an assessment of:

- Whether the objectives were met, and if not, why not
- Whether the work was worth doing
- Whether it was done well
- What else the organisation did
- Whether resources were well used
- What remains to be done
- What can be learnt from the project to inform others in the future

Good evaluation requires clear aims and objectives.

For example:

> *Aim*
> To bring 16-18 year old into a theatre building and develop their understanding of how a dance work is created, staged and toured.
>
> *Objective*
> To increase the percentage of 16-18 year olds who attend dance performances from 5% to 10% of the total audience.

Some objectives will take a long time to achieve and therefore long-term objectives may need to be broken down into a series of step-by-step objectives. For example:

By the end of the workshop, 25% of the participants to say that they are not hostile to the idea of doing a music activity in the future and can describe some of the actions they would have to take to do so, e.g. to find out what is available in their area.

For audience development you will need to decide what you are monitoring:

How many people were involved?
What kind of people were involved?
How did they judge the quality of the experience?
Was it an effective use of my resources?
Did I get any unexpected results?
Is it worth doing again?

To answer these questions you will need to have decided at the outset what you wanted to achieve and it will involve collecting information. The type of information you collect will depend on what you need to know. Also, some funded projects will require very robust information collected.

Information is useless if you don't use it. You need to weigh up constantly the value of information you are collecting against what it costs you in time, effort and maybe money to collect it.

Ways to collect information for monitoring and evaluation:

- Talk to colleagues involved in organising and doing the activity
- Talk to the participants or attenders after the event
- Talk to participants or attenders before or after the event and compare their expectations with what they think happened.
- Ticket sales
- Take up of sales promotions including response rate to a direct mail campaigns
- Attendance figures
- Postcodes
- Profiling postcodes
- Questionnaires
- Comments cards

  Etc.

Choose the method or methods that will tell you what you want to know most effectively.

Evaluating audience development plans is part of the philosophy of continuous improvement and reflecting and learning from experiences. When resources are scarce, evaluation becomes even more critical.

When writing your marketing plan decide how you will monitor and evaluate your audience development for drama. Decide how success will be defined.

See The Marketing Manual by Heather Maitland and Thinking Big by Stephen Cashman for more advice on monitoring and evaluation.