The Search For Audiences

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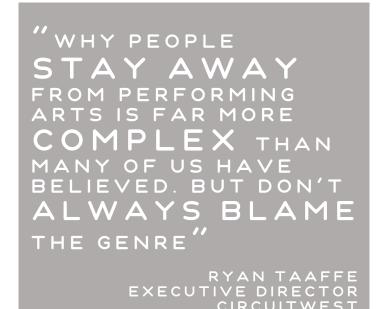
A Presenter Research Resource For Audience Development

What Is This Resource ?

The Search For Audiences is a resource explaining the outcomes of audience development research across 12 regional cities and towns, explaining the findings that were common across multiple areas and providing questionnaire guidelines and strategies being considered as a result of what was learnt.

What Is This Resource ?

> "WHY PEOPLE STAY AWAY FROM PERFORMING ARTS IS FAR MORE COMPLEX THAN MANY OF US HAVE BELIEVED. BUT DON'T ALWAYS BLAME THE GENRE"
>
> RYAN TAAFFE
> EXECUTIVE DIRECTOR
> CIRCUITWEST

The Search for Audiences handbook is a tool for helping presenters (i.e., venues) build audiences. It details the research techniques CircuitWest and its participating members used for 12 Western Australian presenters in its projects involving focus groups (qualitative) and, in some cases, surveys (quantitative). It provides an overview of the main factors that influenced audience behaviour across the studies, as well as details the research questions posed and research respondents' feedback. It also provides recommendations regarding strategies for audience development.

This resource provides insight into the factors that influenced audiences in the studies conducted, allowing readers to develop their own research and strategies.

The research this handbook details refers to audiences (those who currently attend), non-audiences (those who do not attend or may have attended in the past and lapsed) and target audiences (those who presenters want to encourage to come to venues). Furthermore, this resource uses 'venue' to refer to the location for performing arts and a 'presenter' as an organisation that presents the performing arts.

How the project started

In July 2018, the Government of Western Australia funded CircuitWest to deliver grants, training, planning, facilitation and support for research into audience development across 12 regional towns and cities. Development of the project was prompted by feedback from presenters across WA based on a need to grow and better engage audiences, particularly in light of declining audience numbers across the sector.

The project provided one-off support for discrete audience development projects aiming to encourage new approaches to increasing audience numbers through in-depth research, listening to audiences engaged with presenters, collaboration with presenter-partner organisations and information from non-audiences who were not attending performances.

The project supported new research projects and innovative thinking with the following aims:
- to create new strategic approaches to audience development;
- to learn how to promote products, works or organisations to new audiences in novel ways;

- to diversify and/or increase earned revenue streams through listening to audience preferences;
- to achieve business-objective growth based on insight into audience barriers;
- to deliver feedback for program development; and/or;
- to provide information pertaining to audience development for future marketing activities.

The project complemented presentations given at the WA Showcase Conference in 2018 by USA research leader Dr Bob Harlow. In conjunction with The Wallace Foundation, Dr Harlow is credited with a variety of successful research projects into audience development and subsequent strategies to be implemented in the performing arts across the USA. This research is summarised in *The Road to Results – Effective Practices for Building Arts Audiences* (Copyright 2014, The Wallace Foundation). As part of presenters' research submissions, they were instructed to identify the practices from Dr Harlow's work they wished to target in their research. Dr Harlow served as consultant on all 12 audience development projects.

A formal request for research funding applications was received and 12 successful recipients were identified. Funding was granted for projects by the following presenters:

- Beverley Station Arts
- Arts Narrogin
- Albany Entertainment Centre
- Shire of Moora
- Bunbury Regional Entertainment Centre
- Ravensthorpe Regional Arts Council
- Euphorium Creative
- Mandurah Performing Arts Centre
- Cummins Theatre
- Carnarvon Civic Centre
- Harvey Recreation and Cultural Centre
- Goldfields Arts Centre

At the time of application, each presenter was facing a unique set of challenges and had specific objectives they wished to achieve. The studies employed focus groups and a number of the presenters followed up with quantitative research methods to confirm specific learnings and consistent trends in responses.

In the two years that I have been working with CircuitWest, I've come to admire how the organisation continually pushes through one of the greatest barriers to bringing in new audiences, the status quo. This handbook is another firm step in that direction. Over the course of my career I've had the privilege of working alongside dozens of arts groups trying to grow their audiences, and even the highest performing among them are not immune to the force of inertia, the illusion of safety in doing things because "We've always done it this way," which prevents them from questioning long-held assumptions that may be holding back audience growth. This handbook gives venue managers and staff concrete and practical ways to begin to see their way through that wall.

As a researcher, I'm probably biased in my thinking that effective audience development requires collecting information about audiences up front, so that our overtures are based on evidence—and not hunches—about what may or may not motivate non-attendees. Our own hunches often turn out wrong simply because non-attendees think about the arts very differently than we and our staffs do. We need to understand how they see us and what matters to them. Audience research to deliver that information can seem out of reach for most arts presenters, particularly small ones that may believe they lack the budget, time, or skills to carry out the work, so it does not get done. But even small, carefully crafted research projects like the ones behind the 12 organizational studies that informed this work, can provide insights to bring in audiences. I hope the insights in this handbook will inspire others to follow their example.

Using research to attract newcomers does not mean asking audiences to choose the season. It is instead about learning why large groups of people cannot envision attending or even fathom why they would, what they need to know about our programs so that they understand what's on and can choose what to attend, the kind of experiences they want to have and how that aligns with their expectations of what we provide, and what we might be doing that is inadvertently keeping them away. It begins by asking the right questions, listening to the answers, and then using the information to create new or shore up existing pathways to our venues. Findings from the 12 studies point to ten factors described herein that merit consideration by any organization looking to develop well-founded approaches for audience growth. They can be a starting point for your own thinking about areas to consider and questions to ask in your own efforts to challenge the status quo.

Dr Bob Harlow
Author - The Road to Results: Effective Practices for Building Arts Audiences

OVERVIEW OF THE RESULTS

While the studies differed based on a presenter's specific set of challenges and objectives, they shared central themes: every presenter was focused on audience development (i.e., growing audience numbers and attracting new audience members to their venues, particularly in relation to non-commercial performing arts genres such as dance, classical music, opera, family theatre and theatre) and all had a desire to deepen their relationship with their existing audience.

The studies collectively identified some important findings, with one underlying finding consistent with previous research on the topic. Specifically, it is clear from the studies conducted that a large percentage of any marketplace report they will never attend subsidised performing arts such as theatre, dance, classical music or opera regardless of strategy implementation. However, this percentage was found to be extremely variable in terms of the regional footprint and was directly correlated with the percentage of those audience members who had no experience outside commercial performing arts (e.g., contemporary and tribute music, musical theatre and comedy). The evidence from the current studies and past research suggests that, the longer one goes without trying different genres across the arts, the less likely they are to ever try them. This gap in experience seems to lead to often subconscious negative bias towards some genres and is considered a key barrier to audience development. Audiences unfamiliar with non-commercial performing arts collectively hold the perception that such experiences of the arts are likely to be poor. Accordingly, this suggests that presenters of non-commercial performing arts might consider the benefits in targeting younger audiences, as the more non-audiences remain disengaged with such performing arts experiences, the less likely they are to try something new.

At times, this finding was observed to contradict some buying behaviour. Specifically, major non-commercial performances (e.g., ballet and orchestra) presented by significant performing arts companies that only tour very occasionally (i.e., less than once every few years) often sell out despite the current studies demonstrating that these are unpopular performing arts genres. The studies revealed that occasional 'international quality' events are viewed differently compared with most touring performing arts, as they are seen as significant regional events.

Another key finding generated from the studies was that, despite the notable level of people who are likely never to attend non-commercial performing arts performances, there was an encouragingly high level of interest across numerous genres, even from individuals who did not purchase tickets to attend performances within non-commercial genres. This means there are potential development opportunities relating to audiences who have never attended non-commercial performing arts performances but who would attend given the right conditions. Although the percentages varied, often 20 per cent of those participating in the research had not attended some non-commercial genres but had displayed no resistance towards the genres themselves. Presenters can be optimistic about this, as it demonstrates that potential audiences do exist among non-audiences and that strategies can be developed to break down audience barriers to attendance that go beyond genre.

The research highlighted ten key factors influencing audiences. These factors are identified in this report if they emerged in more than three regions or towns. The next section details the following:

- descriptions of the factors that influence audience development;
- commentary on what the research has revealed, example questions for future research projects, and examples of strategies being considered or trialled.

OVERVIEW OF THE RESULTS

FACTORS THAT INFLUENCE AUDIENCES

LOCATION	PRICE	PERSUASION	THE ART OF GATHERING	TARGET AUDIENCE
Sometimes it is the place and not the performance that acts as a barrier to audience attendance. If the location/product brand is perceived to have little to no value to a non-audience, such audience will not attend. Does location or perception regarding the location need to be changed in order to grow audiences?	A core barrier to trying new experiences for audiences was price. Pricing across the sector tends to reflect a single price and concession pricing. What this means is that potential audiences often need to pay a similar price to a genre they are loyal to as they would to a new performing arts experience. Does the pricing strategy reflect obstacles to developing new audiences or is it one price fits all?	New audiences need proof they should attend, and that proof needs to compete with competitive choices they might make. Do strategies reflect proof provided to audiences that they will enjoy what they see?	People are often attracted to events over performances. Sport fans are often engaged two to three times the amount the sport takes to play. Is the strategy bringing people together as an event or is the sole intention to put a performance on stage?	In the studies, different targets detailed needs for often varied performing arts interactions. A memorable quote was provided by a member from one region which targeted the youth market and sums up the challenge quite well: "I don't go where my grandmother goes."

LISTENING	COMMUNITY NEEDS	THE MYSTERY	LOYALTY	TIMING
Research is an important tool in terms of remaining relevant in programming. The research showed that audiences were often not asked what is relevant to them and that what occurred at the venue was delivered without the community's input.	Regional audiences consistently reported that they would see more work that contributes to community needs and/or engages local artists. This was the most consistent finding across WA, where there was a need for connection with the community in programming. This could mean anything from local content to charitable partnerships.	Much of what any presenter does is largely behind closed doors. Potential audiences often had no perception of what occurred within a venue and many simply assumed it would not be for them. Strategy needs to consider how to effectively communicate the memorable experiences being had at different venues.	Many presenters have a loyal base of attendees, but few really connect fully with these or have strategies to retain or deepen these relationships. The research showed loyal customers are rarely fully engaged and are sometimes asked to pay to join membership programs. Presenters should consider how they manage loyalty with their audiences.	The research showed that presenting often occurred outside the context of competing priorities, impacting large groups in populations. These included agriculture, parenting and leisure activities, and created significant barriers to entry. Presenters should consider the bigger community/regional picture in which they are presenting.

"IT'S A VENUE WHERE RICH PEOPLE GO TO WATCH OPERA"

–FOCUS GROUP PARTICIPANT

Without doubt, a major consideration for every presenter is understanding whether people want to come and sit in front of their stage in their venue? If not, why not?

To encourage people who are disinclined to come to a location to enjoy a new experience requires the implementation of careful strategies. First, in audience development, it is important to determine the perceptions and barriers people hold for the actual location of a performance.

Some common challenges were raised in this research.

Age

For some presenters it is a challenge to be all things to all people in all age groups. Although not surprising, it is important to understand that 18-year-olds do not necessarily want to spend their time with a much older audience. It is also no surprise that programming for one group is unlikely to appeal to another group in a vastly different age bracket. Presenters who have built their reputations with older audiences may face brand issues if they target younger markets. Programming needs to consider the impact on one target audience knowing a venue entertains another target audience they don't feel aligned with.

Not a place for people like me

Presenters with specialist arts venues who often program non-commercial performing arts may be faced with attempting to strengthen audience numbers with people who are intimidated by the location used. Imagine your first day in a new school. Did you feel lost? Maybe a bit intimated or lonely? First-timers may well be victims of the following three key barriers:

- venues are places of 'high' arts that will be too hard for them to ever understand,
- venues are full of crowds who enjoy high art and who know everything about art as well as those they are interacting with them within a particular location, and
- spaces are intimidating if they attend alone.

Presenters should invest time in investigating whether people avoid their performances because they have fears outside the performance itself and, therefore, not simply assume non-attendance is about the genre of the performance alone.

Shortcomings

No venue is perfect, and presenters should be aware of their shortcomings to better address them wherever possible. Many participants of this research raised issues, from climate control to seating, and everything in between. These were given as genuine reasons that prevented them from attending and returning to a particular experience. This is concerning, as these negative perceptions can become regional "facts" and sometimes urban myths, which are difficult to counter even if a presenter addresses the concern.

Presenters should be aware of the key shortcomings/barriers raised by their audiences and also consider developing a management and communications plan to combat these. For example, an audience will not know that a presenter has installed air-conditioning at their venue if they stopped coming three years ago due to intolerable temperatures.

The factors of a performance that deter audiences often are not the performances themselves but features of the experience such as the amenities provided in a venue, parking, and food/beverage services. It would be beneficial to presenters if more information could be gathered on such aspects of an audience's experience at a given venue.

Thirty years ago, cafes worldwide began providing blankets with their outdoor seating arrangements because they could not control the climate for their customers. The strategy to provide blankets was a cost-effective measure and helped significantly towards increasing patrons' comfort.

Reputation

Spaces for performance can carry negative reputations without clearly defined reasons. Several regional spaces in this research were considered negatively by some research participants and this was viewed as an obvious barrier to entry. When asked to describe reasons for their negative views, some who held these views identified problems that did not exist or historical problems that had since been addressed. Future research needs to further investigate whether negativity directed at a space is caused by specific issues and, subsequently, should identify those issues. It may be that non-attendance is caused by the reputational factors of a venue rather than any programming issues experienced.

Research conducted for one WA venue demonstrated that some of the underlying dislike of the space was based on decisions made before the space was even built and not on anything specific pertaining to the venue itself. Another region found that audience bias against a certain venue was due to negative feelings towards the local shire and not the venue itself (i.e., because the facility was shire-run, it was boycotted by some groups in the community).

LOCATION

Changing spaces

Presenters tend to have limited options in terms of performance spaces. The research showed that, where possible, presenters could grow audiences by researching the most popular performing spaces and considering these when programming. When this topic was explored around the Western Australian region, it was clear that, for many to try a performing arts genre, it needed to occur in a performing space that was both familiar and positively viewed by them.

The research showed that a regional opera company that performs periodically in an impressive amphitheatre attracts an audience that, if statistically compared with the Perth population, is the equivalent of the attendance of 228,000 people in the metropolitan area. The main reason for such attendance is the quality of the work, but much can be said for the accessible space it chooses as a venue.

POTENTIAL RESEARCH QUESTIONS

- Would you recommend this venue to family and friends (using a 10-point Net Promoter Score or similar scale)?
- Tell us about your last experience at this venue. What do you recall about it? What was good and bad?
- What makes the experience at a venue a positive one for you?
- We have $1,000,000 to spend to improve this particular venue. Where would you advise us to start?
- Have you been to the venue? If not, what reasons/factors have kept/keep you away?
- In describing the venue to someone else, what words would come to your mind?
- Our database indicates you may not have been to this venue for some time. If that is true, can you tell us if there are any specific aspects of the venue that we can change to bring you back?
- How true are these statements for you? (Sample questions, where 1 = *not at all true* and 5 = *very true for you*: I feel the venue does not appeal to people like me; I believe the venue is not worth visiting; I don't know what the venue puts on; I don't *understand* what the venue puts on; no one I know goes to the venue; and I don't think the venue is for my age group)
- Is this venue a good place to attend socially—that is, before and after performances?
- Exit research. How was your experience today with respect to the following aspects of our venue: seating, temperature, food and beverages, service, friendliness, et cetera?

LOCATION

POTENTIAL STRATEGIES

Age
- Conduct a focus group research study to understand if your marketing appeals to your target audience;
- Conduct an audit of the known presenter challenges that may be barriers to ticket sales—for example, climate control, acoustics, transport, et cetera—and then run this as a basis for research directed at your lapsed customers to see which factors most significantly affect attendance.

Space
- Consider an open day/community event for demographics wider than your usual audience to encourage more people to experience the performing space, particularly if areas have been renovated, improved or changed;
- Look for easy wins in reversing negative perceptions identified in research through communication to your lapsed audiences on improved spaces, products, ideas (e.g., the bar now opens early, or problems associated with room temperature have been addressed);
- Create a communication plan based directly on improving one key aspect of the reputation of the space;
- Plan to have digital communications that illustrate and reinforce the positive experiences customers have in a performance space;
- Visit the spaces that program the work you program but have more success in doing so. See what you can learn from these spaces.

Shortcomings
- Research your venue challenges using exit/attrition surveys;
- Understand perception shortcomings that are 'urban myths' and look at how these can be reversed (i.e., this venue not for people like us because it is for older/richer/white/English speaking/etc);
- Ask your customers what they might do to fix your shortcomings—that is, look for simple fixes first over major capex changes.

Reputation
- Conduct research to understand your reputation across target audiences, beginning with your loyal customers and working through to lapsed customers outlined on your database, as well as your non-audiences;
- Develop a brand strategy targeting where you want to be in the market and the brand actions needed to achieve specified targets;
- Consider a strategy that positions your loyal customers as reputation ambassadors.

PRICE

There are very few entertainment products that do not carry some degree of price sensitivity. There were clear misconceptions amongst some participants in the research that performing arts is costly and, therefore, reserved for the wealthy. There was also evidence that a sizeable target audience for a significant number of performing arts experiences comprises customers over 60, a group who are often retired and subject to budget constraints.

The research across WA very clearly demonstrated that there were wealthier customers for which price was no object; however, overall, this was not the majority of market buyers. The research also illustrated that a great many presenters had a core group of loyal customers who attended the majority of their performing arts events, as well as volunteered for the presenter—these were often seniors.

"WE CAN **AFFORD ONE** SHOW A **MONTH** AND THAT'S ALL, **NO MATTER** HOW MANY ARE **ON**"

— FOCUS GROUP PARTICIPANT

The research conducted in several regions demonstrated that many buyers made decisions based on personal budgets and that these often meant cherry-picking shows to a certain dollar value alongside other entertainment experiences outlined their budgets.

In several regions, family buyers revealed they were dissatisfied with the expectation that they were to pay adult price to see a child's show when the only reason they were attending was to accompany a child. This influenced ticket-buying behaviour. Some respondents made the decision that one parent would bring one to two of their children to shows rather than attend as a family, as there were few incentives to book four or more tickets. Overall, there was great interest in multiple-ticket-purchase models, but few were applying this beyond pricing for adults and children.

For those who had never seen a performing-arts genre before, the cost of entry was a barrier to audience development. The average ticket pricing of $25-50 across the 12 presenters was often considered too high to try a new experience when potential audiences would likely choose lower-cost, lower-risk options such as a movie. The cost of entry was often too high to encourage people to take a leap of faith with regard to performing arts genres they had never experienced.

Price tolerance seemed to sit around $30-50 for performances attended by existing, regularly attending audiences of performing arts events. This was a very common price range for presenters across WA. Observations across WA did not show any general negativity to the pricing of any of the 12 presenters for their own programmed work.

PRICE

In almost every region, hire bookings (especially for contemporary or tribute music, or comedy) with ticket pricing above $70-100 were considered expensive. However, what is considered expensive needs to be seen in context. Many research participants had travelled to the CBD hotel to see a major touring musical and, in this case, price was no object.

POTENTIAL RESEARCH QUESTIONS

- Do you buy tickets for multiple shows/multiple people at the same time for this venue?
- How do you choose the shows and the people who attend with you?
- Where is the resistance level at which you would no longer consider purchasing a ticket?
- Does your personal budget keep you to a set number of tickets/experiences each month?
- If you attend a show for children, does price impact how many children/family members you bring to the show?
- The ballet/opera/theatre is coming to town. What do you think is a fair price (set pricing scenarios)?

POTENTIAL STRATEGIES

- Develop a pricing strategy that targets loyal buyers to choose multiple events.
- Create an upsell strategy for multiple ticket buyers (i.e., look at the average sales of buyers and incentivise them to increase their average sale by one ticket).
- Create a cross-sell strategy. How do we incentivise multi-show buyers to increase their engagement—that is, if a regular customer buys on average five tickets per annum, will we give them the seventh show free if they buy a sixth.
- Test new-family pricing models/work with families on pricing structure.
- Reconsider adult prices if they are a barrier to audience attendance.
- Develop a pricing strategy that targets new buyers. How can we use the seats we do not sell to encourage non-audiences to try the genre without giving free tickets to those predisposed to come—that is, can we identify disinclined performing arts customers and incentivise product trialling?
- Develop a loyalty strategy around ticketing to deepen engagement with existing buyers.
- Test a single-show pricing strategy to test the elasticity of your pricing (i.e., if you predict 80 people will pay $40 each, see what happens if you price below $20 and/or set a group-buy incentive such as the third person attends for free).
- Develop a papering strategy. If a show is to be filled with many free tickets, what strategy will you use to try and develop audiences?

PERSUASION

Across WA, it was found research attendees and participants typically had an interest across many genres. Overall, the highest number of likes were for commercial genres reported as having the highest ticket sales across LPA reports (e.g., live and tribute music, musical theatre and comedy).

In most regions, live theatre was the next most popular genre, although there was always some interest in other genres. Often 1 in 3 people would see theatre, but less than 1 in 10 actually did attend theatre. From the research conducted, it appears so many people have a passing interest in theatre, but a far lower number are actually ticket buyers.

In this research, it seemed a very high number of people would take a free ticket and try the theatre for the first time, but a much lower number would pay to see it.

"I DON'T EVEN KNOW WHAT OPERA IS"

–FOCUS GROUP PARTICIPANT

Theatre was shown to be is a massive 'blind spot' for non-audiences. The exception to this rule for regional Australians is amateur community theatre, which has a very high take-up in some regions. Across groups and towns, it was very clear the majority of people had never seen a professional play. It was also clear that people did not know what to expect from theatre, had no frame of reference and, therefore, did not pay to attend. It was revealed that marketing was not contributing to persuading new audiences that theatre performances are worth seeing.

When this was explored in some groups in attempts to determine what the key motivators are, a large number indicated that 'knowing how something would make them feel' was a major motivator. Without knowing whether a show would make them laugh, cry, be inspired, be scared, et cetera, new audiences, even those who might like to try something new, were not motivated to buy tickets.

In some research, it was very clear that presenters positioned many quality entertainment experiences in their main marketing channels like brochures or social media. Consequently, audiences were choosing the most popular experience from the list of choices (i.e., choosing the known over the unknown). Some arts genres were not seen to be competing with the more popular genres such as tribute shows, comedy and contemporary music. This indicates the need to reconsider marketing to ensure lesser known genres are communicated in order for them to then be viewed on their merits.
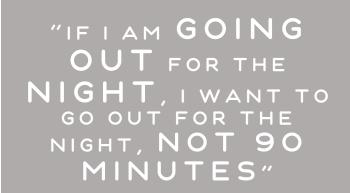
POTENTIAL RESEARCH QUESTIONS

- What are the types of genres you want to see and don't want to see? List all performing arts genres and explore how respondents feel about each. Why do you choose one over another in the genres you do choose? What makes one superior to another? What determines your decision-making process (e.g., people, price, performance, past experiences, preferences, etc?

- Explore dislikes in genres. What do you feel about genres you don't choose? What do you think the experience would be if you did go? (Explore the idea of the experience).
- What are the reasons for how/what you purchase? (Explore budget, other show purchases, cost, influencers, communications, offers, et cetera).
- What genres would you like to try for the first time? (Explore this).
- Have you had a negative experience with (genre example)? If yes, explore reasons why.
- Which of these ideas may get you to try more (genre example)? (List ideas).

POTENTIAL STRATEGIES

- Run loss-leader, theatre-audience development strategies that target non-audiences in the database as part of the annual audience development drive;
- Run discussions before and/or after performances to explain the work as part of the marketing;
- Split test concepts to compare the main marketing kit with emotive or descriptive artwork;
- Obtain as much digital content as possible, including previous work by the producer, artist bios, shared content from other presenters that have toured the work, reviews, and examples of this style of genre (e.g., if it's Baroque music, show other Baroque music) as part of the persuasion;
- Invite your key allies to be persuaders. Offer your top customers in the genre a free ticket to the next show if they share on social media their reasons for attending;
- Ask other presenters who have toured the work to share marketing ideas/strategies.

THE ART OF GATHERING

"IF I AM GOING OUT FOR THE NIGHT, I WANT TO GO OUT FOR THE NIGHT, NOT 90 MINUTES"

–FOCUS GROUP PARTICIPANT

The most common finding across regional WA pertained to the need for "more than just the show".

The smaller the region, the greater the demand was for experiences that involved something beyond attending a show and going home. Many research respondents who were in presenter target markets reported their town had limited entertainment options. A number reported that, if there was a regional event, a significant number of people attended. However, if there was simply a show that was not a big drawcard on its own, it was not interesting to many, particularly those who would have to travel long distances.

'The art of gathering' is a phrase that can be used to describe the range of factors discussed across many research projects. Overall, this points to the need for a beginning or ending comprising social gathering, which was found in the research to likely include food and beverages at which people could gather and catch up while simultaneously attending a performing arts event. This seems to meet the needs of many of the research participants, with one such need revolving around the desire to engage with people at a performance, to know there would be people there they knew, and to catch up in an environment other than the local tavern or club.

There were several regions who made it very clear that attendance was dependent on a range of factors and these may vary from market to market. Youth were seeking experiences where it would only be youth in attendance. Older males sought experience where they knew their mates would go and where they could have a drink and connect. Seniors sought experiences which also included social experiences, and motivation for these was especially contingent on the accessibility of transport and pertained to particular socialising constraints.

One presenter tested the theory of 'the art of gathering' and found that considerably higher ticket sales were generated from having an event at which the performance was the centrepiece of that 'event' but was one of several important components.

POTENTIAL RESEARCH QUESTIONS

- What factors are important to you on a night out? (Explore food/beverage availability, people in attendance, seeing an important performance, socialising, family friendliness, what the event includes, et cetera).
- When you choose a night out, what are your top two considerations in making the purchase?

THE ART OF GATHERING

- What do you like doing before a show? What do you like doing afterwards?
- At the last performance you attended, what was something you would have liked to see improve/added/changed?
- Why don't you attend performances at (venue)? What are the barriers/factors that make you stay home and not attend a performance?
- Do any of these increase the appeal of a performance to you? (Create list of possible features that could be/have been added, such as a sundowner).

POTENTIAL STRATEGIES

- Consider audience development strategies like Talking Theatre* or Test Drive the Arts.**
- Develop a test strategy for events with 'gatherings' as a component;
- Assess your entertainment spaces. Are they fit for this 'social' purpose?;
- Discuss social gatherings with your key supporters;
- Look to other presenters in the region or nearby to assess if something is done well;
- Explore 'gathering' themes that promote the performance as both an event for socialising AND the show itself. (Examples other presenters have used include beer and ballet, chardonnay and a play);
- Share photos of positive social experiences on social media in order that people see the 'art of gathering' as it pertains to your work;
- Recruit attendees by setting up Facebook events and ask people to 'check in';
- Promote unsold tickets on the night by promoting the pre-show social gathering on social wish you were here").

* Talking Theatre   - Dr Rebecca Scollen 2006
** Test Drive The Arts   -   MORRIS HARGREAVES MCINTYRE- 1998

TARGET AUDIENCE

The performing arts presenters participating in the research often sought to attract new target audiences and wanted to explore this further with the groups due to limited success. Four specific target audiences researched were Indigenous Australians, families, youth and seniors.

> "WE DON'T EVEN EXIST IN THE VENUE"
>
> –FOCUS GROUP PARTICIPANT

Indigenous Australians providing input into this process raised many concerns. The first of which was, despite being in regions for thousands of years, Indigenous culture was not seen in many venues in terms of imagery, history, volunteering, employment and/or the art itself. In some venues, traditional owners were completely invisible. The sentiment from this cohort was given as the following: we don't feel we belong in the venue, so we don't attend.

Families providing input into the process raised very practical concerns. The key points raised by this cohort included pram friendliness, change facilities, safety, kid-friendly spaces (i.e., child proofing), activities and activations for foyers, child-friendly food, spaces to dance and play).

Youth target audiences seek their own spaces when attending performing arts. One specific venue was painted and lit, making it extremely accessible for its daytime senior markets, and was regularly full of the many older customers who often attended. Consequently, the space lacked ambience and 'darkness', which are often believed to be attractive to youth markets, and/or the space was simply seen as not 'cool' enough. Some of the youth surveyed sought their own youth-specific experiences in the regional performing arts spaces. In other cases, youth did not consider attending the local venue and it would have required significant changes to compete with other spaces frequented by younger audiences. In this respect, one target audience came at the cost of another.

Seniors are a key target audience to many presenters, and they also present some challenges. The principal reasons raised for non-attendance for this cohort included timing (i.e., night-time shows were often unpopular due to reasons pertaining to accessibility/ease of transport), the lack of sufficient public toilets or seating, pricing or too many choices (i.e., many senior buyers were frequent buyers on low incomes), as well as intolerance of overly-loud volumes.

Whilst many presenters need to consider their venue(s) as one-size-fits-all, there are market risks in attempting to be all things to all people.

TARGET AUDIENCE

POTENTIAL RESEARCH STRATEGIES

- Are there cultural barriers to attending this venue? Explore this issue with groups: What does 'feeling welcome' mean and how is feeling unwelcome overcome? What can be learnt from those doing the best job of making people feel welcome?
- Does this venue make you feel welcome? If not, why not? What would make you feel more welcome? What do you think are weaknesses of this venue and how could they be improved?
- What makes a venue friendly for your family (e.g., play area, food, pricing, break-out space, change areas, et cetera)?
- Describe the ambience when you walk in the venue. Who do you think this venue is usually for—that is, who visits?
- Do you think this is a good venue for (list ideas: rock band, Indigenous dance, panto, orchestra, fringe performers, children's puppet shows, sing-alongs, et cetera)? If yes, why? If no, why not?
- Describe the ideal venue for your live entertainment experience. What features does it have?

POTENTIAL STRATEGIES

- A segment-by-segment overview of your target audience's needs;
- Audit the positive assets in your venue for your key market demographic, such as seniors, Indigenous customers, families, and then develop an asset plan for the strategic direction you wish to take;
- Analyse the history of sales pertaining to target-audience specific performances in the venue, as well as where it has failed to attract audiences and how you can communicate with these markets;
- Have your teams conduct intelligence gathering at the venue's entertainment areas pre- and post-show, as well as at intervals in attempts to determine which issues are most talked about;
- When a target audience (i.e. one you seek) is in your venue for a performance, ensure these people are made visible and well publicised. Break down incorrect perceptions of who attends the venue;
- Run exit surveys to ticketing-data post-shows aimed at specific target audiences.

LISTENING

For many presenters, one of the strengths of the audience development project was that it gave them a chance to listen to customers.

For several presenters, people were very motivated to provide their views on the performing arts. There was a high level of engagement in research within many towns and regions.

The most significant finding was that communities wanted to be asked what they thought, and this was particularly true for loyal venue users. Some reported they had never been asked their opinion over the many years they had been attending specific performance types/venues.

The groups and other feedback highlighted the need for presenters of performing arts to listen (both formally and informally) to the views of community members in relation to performance attendance.

Key feedback from current audiences reflected one of the sentiments expressed in the 2017 touring strategy (Beyond the One Night Stand): "We want you to do it with us, not to us." In other words, involve us in the process of planning for the venue.

Non-audiences, those who did not attend venues, often provided misinformed and incorrect detail about the venue, which suggests some presenters could grow their audiences using simple strategies to change misconceptions regarding venue. However, they first need to listen to hear what these misconceptions are.

The research provided in-depth feedback on presenters who went beyond programming, as well as provided strong indicators and detailed thoughts from audiences and non-audiences alike. While the number one reason people do not attend a performance tends to be that a particular genre does not appeal to them, the research revealed there is a significant number of other reasons that act as barriers to attendance that are targetable.

"THEY HAVE **NEVER ASKED ME** WHAT I **THOUGHT** BEFORE AND I HAVE BEEN **GOING FOR** 27 **YEARS**"

—FOCUS GROUP PARTICIPANT

Outside genre, the most significant factor across WA for those who did not attend performances was a lack of knowledge in terms of what was being presented.

The research proves that presenters seeking to build their audiences should develop a strong engagement strategy (e.g., listening to community members) within their respective regions.

LISTENING

POTENTIAL RESEARCH QUESTIONS

- What do you want from a night out at this or another preferred venue?
- Which genres would you like this region to program more? (Explore the genres respondents want to see more).
- Which genres are those in which you have no interest? (Explore the genres that respondents want to see less).
- If I were to give you a free ticket to this venue, would you attend? If not, why not?
- If the ballet/opera/Shakespeare Theatre Company came to town, would you attend? Who do you think would attend?
- What performance type do you think is missing in your region?
- What was the last performance you saw that really impressed you? Why was this?
- If you have children or grandchildren, what types of performances do you think should be available to them?
- Do you think people in this community have enough opportunities to perform?
- How far do you travel to see the performances you desire to see?

POTENTIAL STRATEGIES

- Conduct discussion groups regarding the venue in the region and invite people from every group you hope to target in order to engage with them;
- Set up listening activities with your team and volunteers to gain a better insight into the topics of conversations spoken about inside and outside of the venue;
- Create a self-completion survey about your venue that can be distributed electronically or handed out;
- Create and send a post-show email measuring perception regarding the event experience.
- Have 'how did we do today?' cards inside the venue;
- Develop relationships with core users of a facility, such as schools, parents' groups, and seniors;
- Maintain one-on-one conversation with your loyal, frequent users.

COMMUNITY NEEDS

Consistently, regional respondents were really clear on three matters:

- They were more likely to support performances that supported local needs (i.e., local charities);
- They would attend content from locals over most other types of performance, and this was often demonstrated by high attendance at community theatre events; and;
- They desired to be with their community (i.e., covered in 'the art of gathering').

> "BECAUSE THE EVENT WAS TO HELP OUT, I RANG ALL MY MATES AND MADE THEM ALL COME"
>
> –FOCUS GROUP PARTICIPANT

The first of these points was that communities invested in performance which invested in them. This was not about support of mainstream causes; it was about giving back to the community by providing some portion of revenue and, as a result, the community would be strong supporters and promoters of an event. This meant that presenters who showed they were connected to helping their communities were more likely to get buy-in for what was being presented.

The second point was that a community had to look within, to its musicians, performers, artists, dancers and tell its own stories. There was significant support for amateur work, at times regardless of quality. The support for community was demonstrated when people would pay one price to see townspeople put on an amateur work but would not pay $10 more to see a professional work presented at the same venue. This raises discussion points worth pursuing. Why do people often find traditional forms of performing arts delivered by amateurs to be more approachable than a professional work presented at the same venue a week later, particularly since the price differential in regional WA is often marginal between amateur and professional work?

The second point also demonstrates the need to engage with local performance (in addition to repertory clubs) such as live musicians or theatre work created locally. This aligns with the bigger conversation being had in Australia regarding communities telling their stories. In all communities researched, live local talent was a drawcard.

COMMUNITY NEEDS

POTENTIAL RESEARCH QUESTIONS

- What types of community performances do you like to attend? (List examples)
- Is there enough community performance generated from your community?
- How likely are you to attend a performance from local performers in (genre type)?
- Do you attend amateur theatre? If yes, can you describe the reasons why? Do you also attend professional theatre? If not, why not? What is the difference between seeing one versus the other?
- On a scale of 1 to 10, how likely are you to attend an event that supports community causes?
- On a scale of 1 to 10, how likely are you to spread the word on an event that supports community causes?
- What types of community causes do you think the venue could support?
- We are talking about telling local stories. Tell us your view on what local stories you might like to hear (e.g., local history, Indigenous work, et cetera).
- Here are some examples of local stories being told (show examples). Would you like to see this in your community?

POTENTIAL STRATEGIES

- Develop a relationship with local amateur producers, understand their market, attend their work and understand the motivations of their attendees;
- Identify all those in your community who are appropriate artists to consider in programming;
- Look to the possibilities of producing local performances;
- Identify the principal charities and causes for the region that appeal to the markets you seek;
- Analyse the presenter yield and calculate the costs of tickets needed after a donation is added;
- Develop an arrangement with local charities and fundraisers to co-promote an event.
- Develop cost-structure models that allow community-based work to be effectively presented.

"IT'S FULL OF OLD PEOPLE— NOT REALLY FOR ME"

–FOCUS GROUP PARTICIPANT

Much of what happens in venues is unknown to those who do not attend them. If this is not the case for regional venues, audiences may have experienced the venue for other reasons, such as school shows, work-related events, and even funerals—none of which are likely to persuade them to attend performing arts at a given venue.

In talking with the non-audiences of arts presenters, it was obvious that some people have an anti-venue sentiment and others are simply unclear on what might happen in the space. As most show promotional and printed material is not specific to the venue in which it will be presented, it does not communicate the whole experience an attendee may have (i.e., details of the show itself are often all that is given).

Unless someone has been to a venue and had a good time, it is unlikely they will know what to expect.

Group after group in the research conducted had people who carried incorrect assumptions regarding venues they had not attended, or not attended for a long time. Some attendees were willing to argue for a criticism of a venue which was often not in any way true. Some venues had reputations for sedentary experiences and, as such, were avoided by many people. Some regional perceptions that venue experiences were 'boring' was not actually correct—this was an impression from non-audiences. A single venue in the research had seen 5,000 people of all ages in a year, with a significant number attending the pre- and post-show functions. However, they did not celebrate and share any of the events, nor the joy experienced in the performance space. As the joy experienced at the venue was never seen outside its loyal users, non-audiences retained their misperception that the space is boring.

This provides presenters with a great opportunity. A region not only needs to be informed of what is coming to a venue and how good it will be, but also how good the experience will be when they attend the venue.

Understanding that an experience will be positive in many ways is a key driver in attending a performance space.

THE GREAT MYSTERY

POTENTIAL RESEARCH QUESTIONS

- Have you been to the venue? If not, why? What do you think happens at the venue? What do you think it would be like to go to an event?
- Who do you think this venue is for?
- Does anyone you know attend? What have they told you about it?
- Do you know if the venue provides the following? (List all ideas based on what the venue offers: pre-show gatherings, post-show gatherings, meet-the-artist opportunities, special spaces for kids, accessible positions and priority/accessible seating, pre-show entertainment from local artists, full bar, food selections, a hearing loop, transport for seniors, morning tea, photo opportunities, competitions, et cetera).

POTENTIAL STRATEGIES

- Invite local journalists to every event at no cost;
- Run a competition at every event to go in the draw to win tickets to the next show by sharing your photos on social media;
- Take as many positive images as possible of people at events and post them to social media, and, if possible, tag those who attended;
- Set up a social media photo space for attendees;
- Ask artists if you can take pictures of their performances to share in publicity and marketing;
- Email and post 'thank you' to event attendees with positive images of the event.

LOYALTY

In every region there was a loyal group of presenter supporters who attended most performances and tended to be volunteers and/or donors who supported the presenter in other ways.

There are member programs providing benefits to those who join and there are volunteer programs to celebrate and thank those who gave their time.

In most cases, however, regular audiences saw very little recognition for their loyalty. There are few programs to reward loyalty, but most require payment to join. The most common type of recognition can be seen in smaller venues where the venue team know regular audience members by name and interact with them personally.

"WE **NEVER** GET **ANYTHING BACK** FROM THE **VENUE**"

–FOCUS GROUP PARTICIPANT

Loyal audiences are the most reliable source of revenue for a presenter, and they are also the most likely to be donors and volunteers. Most importantly, regular audiences are a presenter's best advocates. Research suggests it costs 20 times more to get a new audience member than to retain an existing one.

The research also showed very little in the way of rewards given by most presenters for loyal-ticket buying, multiple-ticket buying, and family-ticket buying. There is a variable but considerable group of 'social influencers' who share social media posts and emails. These people are often group buyers for their family and friends. Overall, multi-buyers were not rewarded by presenters/venues. The research also observed very little strategy to incentivise those who buy for a group.

Additionally, the research demonstrated that most regular audiences were not recognised by presenters and their loyalty was driven by attending the programming they desired and their own willingness to experience events. It also showed that some loyal members felt their loyalty had gone unrecognised.

LOYALTY

POTENTIAL QUESTIONS

- How do you feel the venue recognises how often you go? What do they do to thank you?
- Do you attend the venue often (e.g., every show, more than three times a year, or monthly/weekly)?
- What are the reasons you attend? (Provide a list of examples).
- Would you consider helping the team at the venue more to promote performances?
- On a scale of 1 to 10, how much do you think the venue recognises your loyalty?
- The venue is thinking of rewarding loyal patrons in these ways. Please indicate which would appeal most to you (trial some examples).

POTENTIAL STRATEGIES

- Develop a loyalty program;
- Introduce an ambassador/advocate program;
- Look to your data to see if there is an attrition rate for regular audiences and try to determine the cause by interviewing those who no longer attend;
- Send a personal letter to your loyal audiences for each season launched.

TIMING

Programming is a balancing act and often presenters get specific dates on a tour based on factors outside of their control. However, where there is flexibility with respect to programming, it is worth overlaying the program against significant events outlined on the regional calendar.

The most significant calendar clashes reported in regional areas were those related to agricultural events, which sometimes meant that more than half of the population of a region would not have the capacity to attend events. Some respondents at groups were quite annoyed that the calendar of performing arts disregarded the farming timetable despite this being such a big part of the region's income and employment.

Other scheduling considerations raised were:

- Numerous sporting and holiday activities competing against performing arts programming;
- The day of the week considered to be the best for performing arts events was also a significant day of amateur sports fixtures and this also removed part of the potential audience;
- The time of the day, particularly for weekday shows (e.g., 7.30PM and 8.00PM), may need to be earlier for many patrons;
- Later performance times often meant post-show entertaining options would be closed.
- Family shows need to gather data on the ideal post-school and weekend times;
- While Saturday is often considered the best evening for programming, some areas preferred Thursday or Friday due to timetable clashes.

Presenting performing arts should not be held to ransom behind all events it may find it competes with. Presenters often say the key challenge in terms of programming is that it is completed so far in advance that many other event dates are not yet published.

Keeping this in mind, presenting should be scheduled with the big picture of the region in mind and should be overlayed on a calendar that does not preclude a large percentage of the target audience.
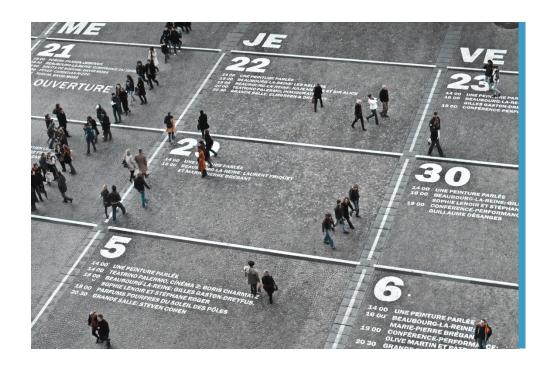
"IN THIS TOWN, WE EITHER WORK ON HARVEST OR SERVICE PEOPLE WHO WORK ON HARVEST"

–FOCUS GROUP PARTICIPANT

TIMING

POTENTIAL QUESTIONS

- What are the barriers that prevent you from attending?
- What are the things you or your family does on the weekend (e.g., in winter and summer)?
- How does the agricultural calendar affect your ability to attend performing arts?
- What day of the week do you most like attending events/performances?
- What time of the day do you most like attending events/performances?
- What times would you say you are generally unavailable?

POTENTIAL STRATEGIES

- If possible, a program to celebrate the beginning and end of major agricultural events;
- Confirm show times are based on audience research and not habit (i.e., what has always been done in the past), as this was shown as a key barrier at ticket purchase;
- Program with the calendars of sporting events (e.g., regional and national major codes) in mind;
- Look to developing a shared calendar with other regional organisations.

This resource raises a great many barriers that affect a decision to attend a performing arts venue. Remember, that this study was conducted in a regional context in WA and that not all factors apply to the potential audience of all venues. None may apply to many venues. This is not a shopping list for barriers, it is a catalyst to help presenters begin discovering their own barriers and removing them.

The most common barrier reported across almost areas was the lack of persuasion. Many researched were inclined to a genre but never bought tickets simply because they had not been enticed to take the next step.

> "IT'S TIME TO STOP ACTIONING WHAT WE THINK WE KNOW AND START TO ACTION WHAT WE LEARN WHEN WE START TO HAVE A CONVERSATION WITH OUR COMMUNITY"
>
> RYAN TAAFFE
> EXECUTIVE DIRECTOR
> CIRCUITWEST

Venues are doing a great job in the art of persuasion and regularly attract new people. However, all quantitative studies showed the size of the non-audience with a predisposition towards performing arts genres to be 2-4 times the size of the ticket buying audience. The feedback from non-audiences around WA showed many were willing but just not enticed. Presenters need to understand the barriers to the 'willing but not enticed' segment to grow audiences. This is the lowest hanging fruit for audience development in this study.

An interesting example of one concentration of 'non audiences' was the great many who were open to attending amateur performing arts. They often attended in safe spaces on regular occasions and were open to variable quality and limited choices. The majority of these were not persuaded to travel not much further and pay not much more (in regional settings) to see the best the state has to offer. This barrier is one that needs to be understood better and targeted better. It's not common in sport for an audience to choose amateur over professional performances so why is that the case in performing arts? How do professional venues provide the same level of safety and belonging audiences feel at amateur performances since we already know they like to sit in front of stages and watch performances?

AFTER THOUGHT

The study also shows there is little value for effort in targeting disinclined customers who would never attend a specific genre or venue under any circumstances. There is a percentage of the world that have no interest in what happens on performing arts stages. It is valuable to identify and move on from these. A great example was the youth audiences that sought experiences to be with their own demographic in bars watching live contemporary music. Many were unmoved by their regional venue. Presenters need to understand that their programming does not compete with these youth interests for many, and maybe they need to look to other audiences or programme in settings and genres that are aligned to this audience interest.

The key overall recommendation of this report is, conduct your own audience development research and understand your own barriers. You will possibly have some of the barriers in this resource and some that are unique to your region and performing space. Ask, probe and clarify as much as you can what you are getting wrong, what people believe is wrong that is not actually wrong and what you are getting right that people just don't know about.

When looking to who to ask about barriers and feedback, start with the data you have and people you can access and consider these questions in finding your research subjects:

- Who has stopped buying tickets?
- Who came once and then not again for a long time?
- Who are first time buyers' brand new the venue and what was their experience?
- In the outside world who are your target markets, define them and go looking; talk to parents at day care centres, cultural groups at their meeting places, seniors at recreation facilities, teenagers at popular youth spots and sports players at training facilities .

We recommend that you start small and try to target just one audience group you believe is missing. Once you have researched and found actionable considerations, target one surmountable barrier that you can change. Prove the barrier exists and what you need to do to remove it and, when you are happy it is removed, debunked or not significant look at the next barrier and the next audience.

Finally, never stop the conversation. Programming changes, management changes, population changes, economic outlook changes and perceptions change and for these changes you should never be to too far from listening to your markets further and understanding the perceptions of your performing space and programming.