

Submission title:  
Sadler's Wells  
Industry sector:  
Media  
Client company:  
Sadler's Wells

Design consultancy:  
Red&White  
Submission date:  
30th June 2017  
For publication

## DBA Effectiveness Submission

S A D L

E R S W

Red&White

E L L S

Photo: Manuel Vason

# Executive Summary

78%

Audience: 'New brand has made Sadler's Wells feel more contemporary'

39%

Audience: more adventurous in selection of shows at Sadler's Wells

139%

On-sale increase...

59%

Decrease in on-sale marketing spend

50%

More shows at Sadler's Wells stage exceeding their final sales target in the last year, generating an additional £465k

83%

Employees: Sadler's Wells feels more contemporary

115%

Increase in first 2 months of new membership scheme

28%

Overall increase in members

# "The new brand places Sadler's Wells not just in a more contemporary light, but as the leading light."

*Alistair Spalding CBE  
Artistic Director and Chief Executive*

Over 20 years, contemporary dance has grown significantly in terms of audience, popularity and stature, and Sadler's Wells is recognised as playing a significant part in driving that change. But whilst the organisation had evolved, Sadler's Wells' existing 10-year-old brand did not reflect the change to potential or existing audiences.

Red&White were appointed to refresh Sadler's Wells' brand, reflecting the changes that started in 2004 when Sadler's Wells' Artistic Director and Chief Executive Alistair Spalding began realising his vision for dance.

Red&White devised a creative solution that put the organisation at the heart of its output: intertwining Sadler's Wells and the work. A further brand architecture recommendation from Red&White distanced Sadler's Wells from its more mainstream offering, The Peacock theatre, so the two brands could be more autonomous and better representative of both the work they showcase and the audiences they speak to.

Since the rebrand, audiences perceive Sadler's Wells as more contemporary, many more shows are exceeding their sales targets (50%), which has increased the overall balance on ticket sales. Audience retention and memberships have increased, and communications are consistent across all outputs.





## Outline of project brief

*"Sadler's Wells may well be the most important dance house in the world"*

*New York Times*

A decade after the arrival of a visionary Artistic Director and Chief Executive, Alistair Spalding, in 2004, Sadler's Wells had outgrown its old brand. Alistair's decision to create and produce original contemporary dance productions with its Associate Artists, Resident Companies and Associate Companies, alongside hosting the world's finest dance companies had secured Sadler's Wells' reputation as a formidable global force in contemporary dance. Sadler's Wells had become a generator for new ideas, creative collaborations, and new experiences that resonate at both an emotional and intellectual level, and are also entertaining. In 2014, the organisation recognised that its existing identity, in place since 1994, had not evolved in line with the organisation, its stature and its ambitions.

Sadler's Wells manages 3 theatres: a 1,500 seat main auditorium (Sadler's Wells stage) the smaller Lilian Baylis Studio, and a separate West End venue The Peacock Theatre.

# The key objectives of the brand refresh were:

**"Sadler's Wells has become a generating engine for new forms of dance and the collaborations with the Associate Artists have made it into a creative community that is agenda setting for the world"**

*Sir Antony Gormley OBE*

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## a. Reassessment

### Challenge:

Sadler's Wells' reputation for presenting work that is "world-class, confident, ambitious, risk-taking and always contemporary" was not being communicated outwardly through the old brand.

### Need:

- A confident visual identity to convey the evolved organisation
- To shift perceptions of Sadler's Wells from host to creator and promise world-class quality across a range of contemporary dance forms.
- Create a distance between Sadler's Wells stage and The Peacock brands.

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## b. Increase ticket sales

### Challenge:

Sadler's Wells' brand remained invisible to many, even culturally active audiences. The logos and chosen imagery of hosted shows dominated all communications, so the brand was recessive and audiences were basing their purchase decisions on content rather than any brand equity from the theatre. With an ever-changing programme, of over 100 productions at three venues each year, the limited marketing spend was not accruing enough brand equity.

### Need:

Consistency of communications and a brand which could unify Sadler's Wells' diverse offering.

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## c. Customer loyalty

### Challenge:

Sadler's Wells stage had a first-timer audience base of around 35-40% each year. While new audiences are crucial for introducing new blood to the art form, Sadler's Wells was not capitalising on the number of people visiting the venue two or more times.

### Need:

Consequently, it needed to become more sophisticated in its targeted communications to all its audience members on its CRM database, to increase repeat visits. As well as needing to increase audience numbers overall, they needed to convert existing audiences to become more frequent attenders.

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## Description

Sadler's Wells is a world-leading dance house, committed to producing, commissioning and presenting new works and to bringing the best international and UK dance to London and worldwide audiences. The theatre's acclaimed year-round programme spans dance of every kind, from contemporary to flamenco, Bollywood to ballet, salsa to street dance and tango to tap. Established in North London in 1683, the venue has played an illustrious role in the history of theatre ever since, with The Royal Ballet, Birmingham Royal Ballet and English National Opera all having started at Sadler's Wells.

In 2004, Alistair Spalding took over as Artistic Director and Chief Executive. Over the 17 years since, he has driven a period of major change and growth both for Sadler's Wells and for contemporary dance as an art form, bringing it increasingly from the periphery to the mainstream. His primary change was to transition the Theatre's function from a presenting venue to a producing house.



**Since 2005, Sadler's Wells has had audiences of over 6.5 million people.**

Since 2005, Sadler's Wells has helped to bring 130 new dance works to the stage, and commissioned more new contemporary dance than any other organisation globally. Sadler's Wells now curates a diverse programme of work, presenting over 100 different productions annually across its three stages, and commissioning and producing original new work which then tours round the world.

#### Theatre industry context

##### Decreased funding around the UK

After the 2008 financial crisis, and subsequent cuts to the arts as part of wider austerity measures, the arts funding climate has been challenging for many organisations. While Sadler's Wells' funding of 9% has been maintained, many arts organisations experiencing funding cuts have had to take drastic action to survive, and in many cases that means taking a more commercial approach to programming which often reduces their ability to take risk.

##### Declining attendances across London

The West End trade association Society of London Theatre measures attendances annually across all its commercial and subsidised member theatre, and it found that attendances across the London have declined by 2.9% since 2014. However, increased ticket prices have increased the average annual yield by 3.4%.

#### Project Launch Date

**November 2014**

Word count  
850

**Design Budget**  
**£55,000**





**"We need a house style that combines beautiful design with practicality."**

The new identity had to capture the creativity of dance, be flexible enough to stretch across all genres of dance, sit next to existing company and show brands, and let Sadler's Wells 'own' the array of shows performed at their various venues. Furthermore, the initial brief said no to a logo change.

**We needed a unique solution.**

We ran workshops with Sadler's Wells' executive and marketing teams to unpick their vision for design. We learnt existing communications elements were always defined by performance rather than brand – so they differed each time, and meant that every campaign started from a place with very low brand equity. But there was a strong appetite within the organisation to be braver.

Contemporary dance is an ever-evolving art form, which often defies definition. We realised the work on stage needed to be central to the identity, so we put evocative dance imagery at the heart of it. We gave Sadler's Wells greater ownership of the dance experience by overlaying the strong typographic structure of the wordmark on the production images. This assertive statement about its role in creating and curating dance, allowed for a stronger association between this and the emotion and energy of the live performance experience. Sadler's Wells and the work are intertwined as one.

Sadler's Wells' customers were attracted by the production on stage – by the artist, company, or the work itself, making Sadler's Wells' communications and brand equity almost insignificant. As a result, audiences struggled to recognise it and make associations between performances. This was made harder because the posters, leaflets, videos and digital content compete for audiences in London's saturated cultural marketplace.

We decided to put Sadler's Wells' name over the content, a more original solution than the usual top right/bottom left sign off. This made the name immediately noticeable, but did not compromise the imagery, instead inviting further scrutiny. Alongside the strong consistent wordmark, typography has absolute flexibility within a clear structure to move around any composition, making sure any type of layout, whether poster, video or brochure, always responds to the performance image.

The wordmark acts as a kind of hallmark over the imagery, creating a strong link with a breadth of very different experiences. It acts as an endorsement of brave and interesting contemporary dance, a Sadler's Wells lens on any dance form. One which encourages a defiance of expectation, a celebration of experimentation, and has encouraged audiences to engage with Sadler's Wells and try more. Red&White recommended separating The Peacock from the Sadler's Wells stage brand. We realised the West End, commercial appeal of The Peacock's shows spoke to a different, more mainstream audience than the work found on Sadler's Wells Stage. There was much confusion amongst audience members, many of whom went to the wrong venue. By detaching the two brands, each could be more single-minded. We created a brand for The Peacock which housed the more mainstream productions effortlessly.

**"Contemporary dance often has a non-linear structure, so unlike more traditional ballets, the experience for audience members is often radically different"**

*Alistair Spalding*



# Summary of results

## 50%

Of participants stated the new branding made them see Sadler's Wells in a new light

## 39%

The new branding encouraged them to be more adventurous in their selections of shows at Sadler's Wells.

## 78%

Say that the new branding has made Sadler's Wells feel more contemporary

The results of the visual identity rebrand have exceeded Sadler's Wells' expectations. In light of attendances across the industry gradually declining, Sadler's Wells have increasingly surpassed their show targets and attracted more loyal members, as well as gaining wider recognition as a contemporary organisation.

### a. Reassessment

Sadler's Wells stage struggled with the way it was being perceived, and this affected the way the wider public and creative collaborators interacted with the theatre. A crucial result of the rebrand was the internal confidence and external recognition of Sadler's Wells' bold and cutting-edge work, particularly in light of the general public's misconceptions about contemporary dance.

### Audience recognition

The launch of Sadler's Wells' new visual identity successfully changed visitors' perceptions of the organisation as a bold, dynamic dance house. We conducted an online survey in order to gauge how people viewed Sadler's Wells before and after the rebrand, and the results were clear.

Previous Visual identity

**Busy**<sup>178</sup> **Cluttered**<sup>108</sup>  
**Dark**<sup>92</sup> **Dated**<sup>62</sup> **Old**<sup>16</sup>  
**Confused**<sup>30</sup> **Wordy**<sup>45</sup>  
**Varied**<sup>33</sup> **Messy**<sup>60</sup>  
**Serious**<sup>43</sup> **Dull**<sup>25</sup> **Old-Fashioned**<sup>35</sup>

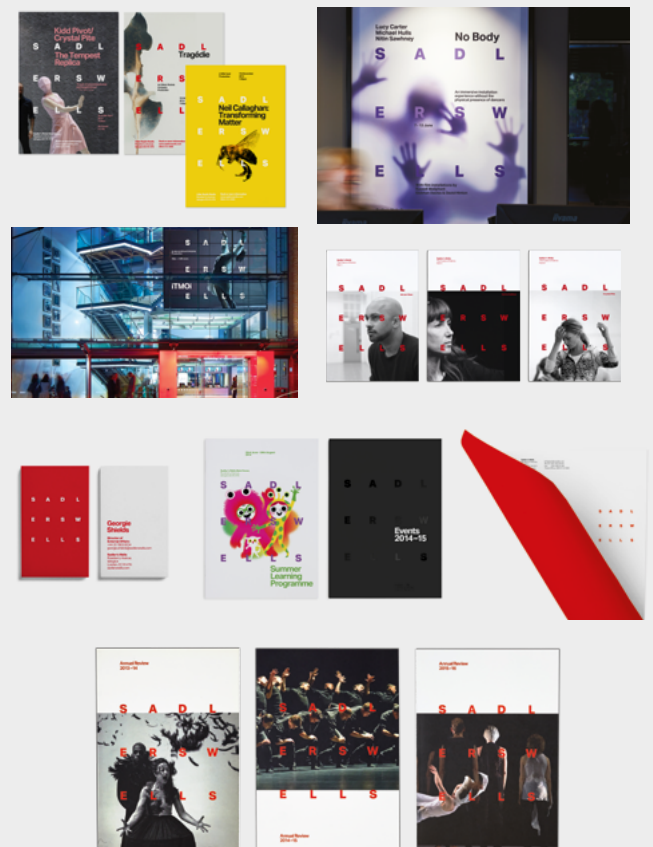
New visual identity

**Modern**<sup>227</sup> **Clear**<sup>88</sup>  
**Contemporary**<sup>102</sup>  
**Stylish**<sup>59</sup> **Exciting**<sup>79</sup>  
**Dynamic**<sup>4</sup> **Colourful**<sup>32</sup>  
**Fresh**<sup>33</sup> **Consistent**<sup>48</sup>  
**Vibrant**<sup>29</sup> **Attractive**<sup>19</sup>

Before



After





# The new visual identity and logo have transformed public perceptions of Sadler's Wells as a contemporary and modern organisation

## 83%

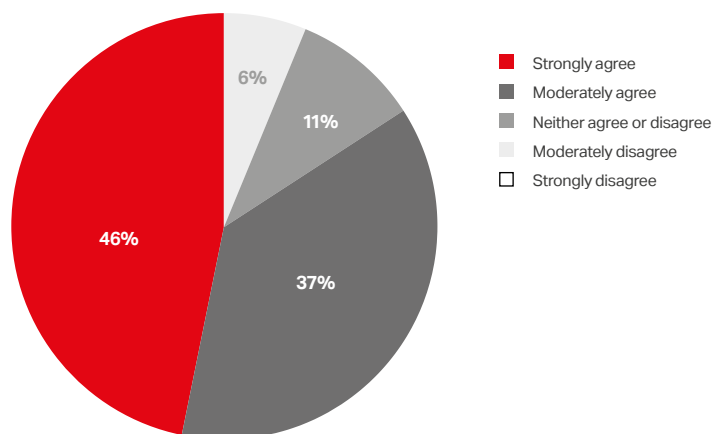
Of employees agreed that Sadler's Wells feels like a more contemporary organisation

## 64%

Of employees stated the new branding made them see SW in a new light

## New branding has changed employees' perceptions

Sadler's Wells feels like a more contemporary organisation



According to Eva Martinez Sadler's Wells Artistic Programmer & Artist Development 'the new brand is more accessible for new audiences, and makes understanding contemporary dance less of a struggle'. Other employees highlighted the way the visual identity and logotype finally reflected the contemporary programming which has come to define Sadler's Wells Theatre. This has crucially allowed staff to explain Sadler's Wells' work more easily and clearly to artists, companies and audiences alike. This internal confidence has been especially significant, particularly with plans for building a new venue set in the next few years.

## Collaborator perception

Sadler's Wells as a brand is hugely affected by other collaborating brands. By overlaying the logo onto posters in a bold and confident manner, the rebrand was the first time Sadler's Wells had asked associates to publically acknowledge their relationship with the organisation, and rendered visible this relationship. As the new visual identity was rolled out, some visiting companies found the more overt placement of the Sadler's Wells brand challenging, but over time, it has become an integral part of people's creative choices. The boldness of the visual identity puts the organisation in good stead for the opening of its fourth venue in East London's cultural education quarter in the next few years.

## b. Awareness/Ticket Sales

Autumn On-Sale Figures (year on year)

(The on-sale metric refers to how many tickets are bought within three weeks of new season going on sale).

Since the launch of the new visual identity, Sadler's Wells have progressively spent 59.2% less on their brochures and guides. In the same time, on-sale figures within the first three weeks have increased by 138.6%. Given that the number and quality of productions programmed have remained consistently strong over the same period, this huge improvement can be attributed to the design solution.

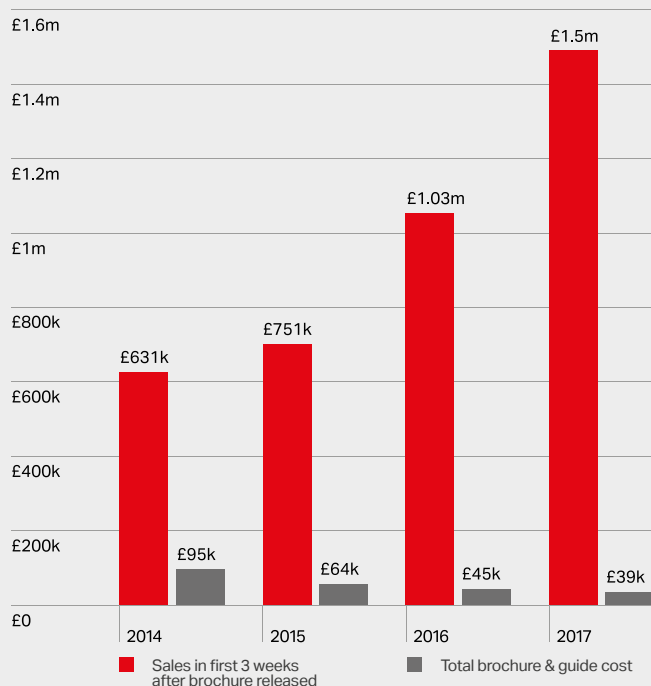
Sebastian Cater, Sadler's Wells Director of Marketing and Sales said "As part of our strategy to modernise our marketing communications since 2014, the new visual identity has sped up design processes and reduced costs. Having separate identities for Sadler's Wells stage and The Peacock means that for the first time we're able to speak in a more targeted way to distinct demographic segments, resulting in greater clarity and consistency of messaging for our audience".

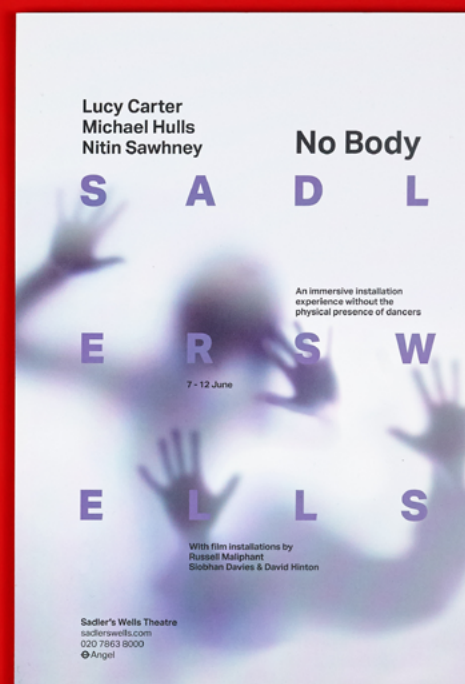
## Greater success and greater returns

Sadler's Wells seeks to challenge audiences and widen their perspectives, and as such is not purely driven by the need to make a profit on performances. It sets targets for shows and uses Balance (sales minus targets) as a measure of success. International shows are expensive to produce, and many are

## On-sale figures soar despite reduced brochure spend

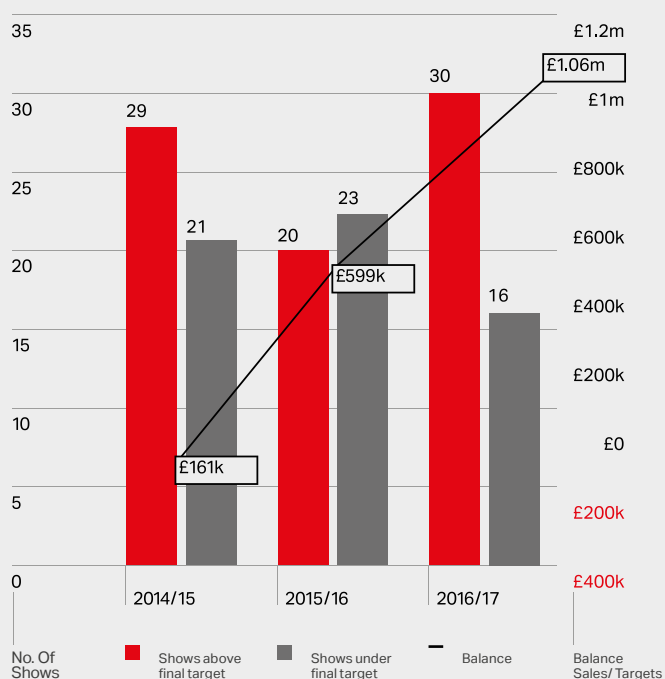
Sales return: new season on-sales





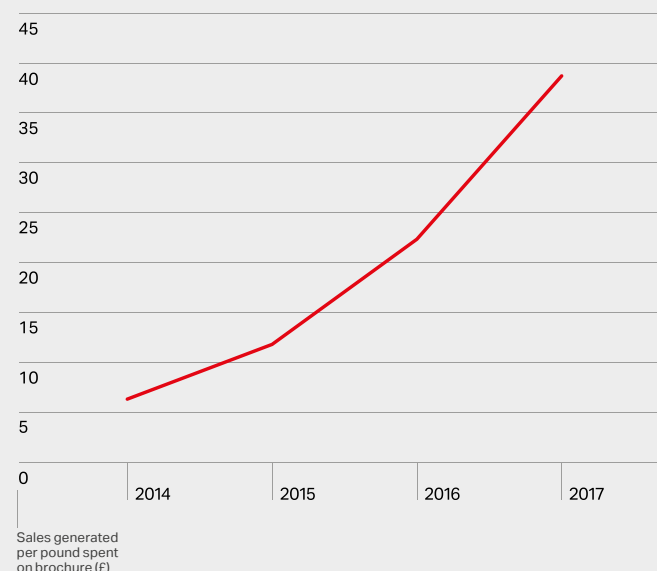
## Greater success and greater returns

Show targets at Sadler's Wells stage



## Season brochure much more effective

Ticket sales (within 3 weeks of brochure release)  
per £ on production





budgeted at a loss in order to ensure ticket prices remain affordable. The more challenging a show, the fewer people will attend. Despite no change in the process for setting targets, even the challenging shows are now outperforming expectations. In the last year at Sadler's Wells stage, the number of shows exceeding their final sales target has increased by 50%, whilst the balance has almost doubled from £598,686 to £1,063,752. This has occurred in spite of attendances across the industry declining by 2.9% since 2014. This increase in income not only allows Sadler's Wells to cover the costs of some of its expensive international productions, but it also enables the organisation to support young people, and invest in the development of new work from its group of Associated Artists and Companies.

### c. Customer Loyalty

#### Returners

*(audience members seeing two or more shows in an 18-month period)*

The rebrand made above-the-line communications work much harder, as increased brand recognition and trust in Sadler's Wells as a curator and creator have resulted in increased retention.

'The new poster styles are sharper, more polished – they are like artworks in themselves and I'm drawn to study them each for longer'

*Survey respondent*

The logo in particular has successfully improved Sadler's Wells' brand recognition. The instantly recognisable logo works as a stamp of approval on the organisation's wide array of productions. This has encouraged repeat sales, as audiences' increased levels of trust encourage them to take more risks.

#### Membership increase since rebrand

Sadler's Wells' new logo and brand identity successfully increased brand awareness, and in turn customer loyalty. This ensured that when Sadler's Wells renewed its membership scheme, which incorporated the new visual identity alongside bespoke designs from Red&White, its audience was very receptive to the new offer. The number of members at Sadler's Wells has increased since the rebrand by 27.8%. This increase shows strengthening customer loyalty. The launch of the new membership scheme in February 2017 was the final stage of the brand's release. Since the launch of this new scheme, there has been a 115% increase in membership.

**'I can experience something of the energy of the show in the artwork. They are more cohesive, the text and image integrated'**

*Survey Respondent*

### d. The Peacock

Red&White separated Sadler's Wells' brand from The Peacock as forced proximity between the two brands was causing confusion amongst certain audience segments. By designing a separate microsite, new audiences to The Peacock would be presented with a more streamlined and relevant range of productions. As a result, total visits, unique visitors and revenue to the website have increased.

**74%**

Increase in total visits to The Peacock website – now 170,133 visits

**71.9%**

Unique visitors to the site have gone up by 71.9% - 129,975

**58%**

Revenue generated via the website has increased by 14.6% (+ £99,760).



## 5. External Influences

Multi-buy schemes – The theatre has reduced the presence of its multi-buy audience development, in order to focus attention on the benefits of its new membership scheme.

New membership drive – The new membership scheme was launched February 2017, and is the final stage of the rebrand. With the new logo and revitalised Season Brochures and Guides in place, the membership was a culmination of the rebrand.

Sadler's Wells invested in an ECRM system, Tessitura, and its enhanced functionality meant that additional benefits could be offered to members.

Sadler's Wells' ran above-the-line advertising campaigns as usual throughout the period of the rebrand.

## 5. Research Resources

Sadler's Wells internal figure  
Box Office Data Report 2014  
Box Office Data Report 2015  
Box Office Data Report 2016  
Analysis of Theatre in England  
Sadler's Wells/Purple Seven Did You  
Enjoy That post-show surveys

## Appendix

- 01** Unless otherwise specified, Sadler's Wells is the entire organisation, and 'Sadler's Wells stage refers to the largest of the organisation's three auditoria.
- 02** The survey was open from 7th to 12th June 2017 and completed by 967 people who have attended two or more shows at Sadler's Wells Theatre over the last four years.
- 03** Sadler's Wells' employees also completed a survey, with (47 respondents out of 191 staff), which highlighted the success of the rebrand internally.
- 04** Each show's target is based on the previous sales of similar shows, or previous visits by the same company, and assessing what sales level Sadler's Wells anticipate this production reaching. Previous financial performance is taken into consideration for returning shows, as well as reviews its critical reception in the media.
- 05** The balance is the difference between sales and targets (Balance = £Sales - £Target) – this balance is not profit, just income