Taking Out the Guesswork: Using Research to Build Arts Audiences

League of American Orchestras
June 10, 2016
Trying build a new audience is filled with unknowns

Why aren’t they coming?

What are they looking for?

How do we become relevant?
What communications or other marketing will speak to them?

What gets the attention of a busy audience?

How can we combat stereotypes of orchestral music performances?

What kinds of brochures will they respond to?
...and how do you know if you’re on the right track?

Who’s coming?

What brings them here?

Did they like it? What did they like?
“Inviting guests to dinner without first finding out what they like to eat or what food allergies they may have”
Magda Martinez—Director of Programs, Fleisher Art Memorial
Wallace Excellence Awards Program
Results

A range of projects

• 54 organizations in 6 cities, 2006–2014:
  – Diverse art forms
  – Budgets over $1 million

With substantial results

• Those targeting increase in overall audience grew 29%
• Higher for those targeting specific segments
9 Effective Audience-Building Practices

- Learn about audiences: pinpoint barriers and what attracts them
- More effective marketing
- Track progress
# Two Types of Research, Two Purposes

<table>
<thead>
<tr>
<th>Qualitative</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal</strong></td>
<td><strong>Explore</strong>: Data are concepts and ideas</td>
</tr>
<tr>
<td><strong>Types of Questions:</strong></td>
<td>Open-ended, free form: “why”, “how”</td>
</tr>
<tr>
<td><strong>Typical Methods</strong></td>
<td>Focus groups, one-on-one interviews (open-ended responses)</td>
</tr>
</tbody>
</table>
### Two Types of Research, Two Purposes

<table>
<thead>
<tr>
<th></th>
<th>Qualitative</th>
<th>Quantitative</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal</strong></td>
<td><strong>Explore</strong>: Data are concepts and ideas</td>
<td><strong>Count, measure</strong>: Data are numbers (like polls)</td>
</tr>
<tr>
<td><strong>Types of Questions:</strong></td>
<td>Open-ended, free form: “why”, “how”</td>
<td>Closed-ended, set responses: “how many”</td>
</tr>
<tr>
<td><strong>Typical Methods</strong></td>
<td>Focus groups, one-on-one interviews (open-ended responses)</td>
<td>Surveys (many more respondents)</td>
</tr>
</tbody>
</table>
Take Out the Guesswork

• Learn about audiences: pinpoint barriers and what attracts them
• More effective marketing
• Track progress
Using Focus Groups to Learn About New Audiences

• Moderated discussions
• 90 min. – 2 hours each
• 6-8 target audience members
  • Demographically similar, like-minded
• 3 groups at minimum
• Often recruited professionally
  • Not our audience/membership base
Focus Groups Can Explore *What, How, and Why*

- Why don’t they visit?
- What do they think/know about us and our work?
- What do they look for when going out?
- How can we break through barriers?
San Francisco Girls Chorus:
• Founded in 1978
• Performing chorus: 45 girls ages 12–18
• Audience: 4,865 annually to 8-concert season
• Operating budget: $2.2 million
The challenge:
• Internationally known, locally hidden
• Concerts attended by friends, family, but not classical music patrons
• Examined how classical music patrons saw the chorus
3 focus groups with classical music patrons revealed:

- “girls chorus” sounds like “glee club”
- SF Girls Chorus’s own marketing didn’t help
- Venues, front of house experience don’t match expectations
Challenging the stereotype of “girls chorus”
More classical music patrons attend SF Girls Chorus concerts

% of Classical Music Patrons (not friends or family) in Audience +28%

Baseline: 18%
Year 1: 28%
Year 2: 23%
Take Out the Guesswork

- Learn about audiences: pinpoint barriers and what attracts them
- More effective marketing
- Track progress
Clay Studio triples enrollment, doubles revenue

Students

<table>
<thead>
<tr>
<th>Year</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>734</td>
</tr>
<tr>
<td>2008</td>
<td>955</td>
</tr>
<tr>
<td>2009</td>
<td>1,296</td>
</tr>
<tr>
<td>2010</td>
<td>1,414</td>
</tr>
<tr>
<td>2011</td>
<td>1,560</td>
</tr>
<tr>
<td>2012</td>
<td>2,309</td>
</tr>
<tr>
<td>2013</td>
<td>2,280</td>
</tr>
</tbody>
</table>

School Revenue

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>$150</td>
</tr>
<tr>
<td>2008</td>
<td>$182K</td>
</tr>
<tr>
<td>2009</td>
<td>$211K</td>
</tr>
<tr>
<td>2010</td>
<td>$266K</td>
</tr>
<tr>
<td>2011</td>
<td>$277K</td>
</tr>
<tr>
<td>2012</td>
<td>$308K</td>
</tr>
<tr>
<td>2013</td>
<td>$322K</td>
</tr>
</tbody>
</table>

+215%
Clay Studio Speaks to a New Audience

• Annual operating budget: $1.7 million, includes exhibitions, classes, gallery, shop, and more
• Objective: Encourage young professionals to take part in classes and workshops
Looking to Existing Research

Young adults may be enticed by more active participation, especially social

Across art forms, audiences less inclined to commit
Putting these insights together

- Low commitment
- Social
- Participatory
Low commitment, social, participatory → Date Night
Focus Groups Also Helpful to Shape Marketing

How can we get their attention?

What messages do words and images we use send?

What conveys something interesting to them?

• Share materials, get reactions
• Share other materials—what do they respond to?
• Feedback can surprise—your material not designed for them
<table>
<thead>
<tr>
<th>Research Reveals:</th>
<th>The Adjustment:</th>
</tr>
</thead>
<tbody>
<tr>
<td>It’s too hard to participate. 10-week classes too large a commitment</td>
<td>Shorter classes (e.g., 5-week, 1 day), lower price points</td>
</tr>
<tr>
<td>Research Reveals:</td>
<td>The Adjustment:</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>------------------------------------</td>
</tr>
<tr>
<td>It’s too hard to participate.</td>
<td>Shorter classes (e.g., 5-week, 1 day), lower price points</td>
</tr>
<tr>
<td>10-week classes too large a commitment</td>
<td></td>
</tr>
<tr>
<td>Keep the message simple.</td>
<td>Target communications for exhibits, events, classes, workshops</td>
</tr>
<tr>
<td>Class brochure overwhelms: detail on too many activities</td>
<td></td>
</tr>
<tr>
<td>Research Reveals:</td>
<td>The Adjustment:</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>It’s too hard to participate. 10-week classes too large a commitment</td>
<td>Shorter classes (e.g., 5-week, 1 day), lower price points</td>
</tr>
<tr>
<td>Keep the message simple. Class brochure overwhelms: detail on too many activities</td>
<td>Target communications for exhibits, events, classes, workshops</td>
</tr>
<tr>
<td>Make it sound inviting to them. Terms like “wheel throwing” confuse novices, signal activities are for a different crowd</td>
<td>Drop the jargon; separate communications for newcomers</td>
</tr>
</tbody>
</table>
“We had this tagline, ‘Shaping the future of ceramics,’ which was great but that was for us. Not so much for the audience. That was a real eye-opener. People would say to us in focus groups, ‘Why would I look at this? Why would that make me want to come? I’ve got to look at something and right away see there’s something there for me.’”

– Amy Sarner Williams, former president and CEO
Clay Studio triples enrollment, doubles revenue

- Students:
  - 2007: 734
  - 2008: 955
  - 2009: 1,296
  - 2010: 1,414
  - 2011: 1,560
  - 2012: 2,309
  - 2013: 2,280

- School Revenue:
  - 2007: $150
  - 2008: $182K
  - 2009: $211K
  - 2010: $266K
  - 2011: $277K
  - 2012: $308K
  - 2013: $322K

+ 215% revenue growth from 2007 to 2013.
Market research insights propel Clay Studio’s growth

Since 2008, $894K total additional revenue over $150K baseline

School Revenue

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>$148K</td>
</tr>
<tr>
<td>2005</td>
<td>$154K</td>
</tr>
<tr>
<td>2006</td>
<td>$132K</td>
</tr>
<tr>
<td>2007</td>
<td>$149K</td>
</tr>
<tr>
<td>2008</td>
<td>$182K</td>
</tr>
<tr>
<td>2009</td>
<td>$211K</td>
</tr>
<tr>
<td>2010</td>
<td>$266K</td>
</tr>
<tr>
<td>2011</td>
<td>$277K</td>
</tr>
<tr>
<td>2012</td>
<td>$308K</td>
</tr>
<tr>
<td>2013</td>
<td>$322K</td>
</tr>
<tr>
<td>2014</td>
<td>$378K</td>
</tr>
</tbody>
</table>

+ $32K  +$61K  +$116K  +$127K  +$158K  +$172K  +$228K

Flat year over year
Focus groups
Desk research: Date Night
New visitor research
Funding ends, growth continues

Since 2008, $894K total additional revenue over $150K baseline
The intent: “We thought we had to show the grandeur of the art form”

Somebody in a weird pose

They look like they’re in pain
“No! You have to show an expression somebody can hook into.”
Minnesota Opera: making opera relevant to newcomers

Partnered with relatable talk radio host, spoke of stories and things newcomers could hook into
This year’s season kicks off with the love triangle that turns deadly, in Bizet’s The Pearl Fishers...

...an extravaganza of music, fashion, and dance, with colorful sets and costumes by British fashion icon Zandra Rhodes. Tony Award winner Jesus Garcia and the international sensation Isabel Bayrakdarian shine above the shimmering score by the composer of Carmen.
Take Out the Guesswork

- Learn about audiences: pinpoint barriers and what attracts them
- More effective marketing
- Track progress
Evaluating/measuring: **Surveys** reveal what’s working and where to target improvements

<table>
<thead>
<tr>
<th>Quantitative</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal</strong></td>
<td><strong>Count, measure</strong>: Data are numbers</td>
</tr>
<tr>
<td><strong>Questions</strong>:</td>
<td>Closed-ended</td>
</tr>
<tr>
<td><strong>Methods</strong>:</td>
<td><strong>Surveys</strong></td>
</tr>
</tbody>
</table>

- **Who’s coming?**
  - 24% New
  - 15% 18-24
  - 12% Latino/a
- **What are they doing/visiting?**
  - 20% Pre-show talk
  - 55% Café/Bar
  - 40% Word of Mouth
  - 30% Newspaper
  - 25% Email
- **How heard of program?**
  - 30% Newspaper
  - 25% Email
  - 75% “Very Satisfied”
- **Good experience?**
  - 85% Will Return

Can also examine particular groups, e.g., 85% of Regular Visitors say they will return, but only 25% of Newcomers say they will
More classical music patrons attend SF Girls Chorus concerts

% of Classical Music Patrons (not friends or family) in Audience

Baseline: 18%
Year 1: 28%
Year 2: 23%

+28%
San Francisco Girls Chorus

Please answer a few short questions. The information you provide will help us obtain funding to continue our work. And, it will also qualify you to enter a drawing to win an iPod Nano.

1. Is this the first time you have attended a performance of the San Francisco Girls Chorus?
   - Yes  - No

2. Have you attended any of the following types of performances in the past six months--opera, symphony orchestra, choral music, other classical music including chamber music, recitals etc.?
   - Yes  - No

3a. Are there children under 12 in your household?
   - Yes  - No

3b. [If you have children under 12] Are they with you here at this performance?
   - Yes  - No

4. How did you learn about tonight's performance?
   - newspaper  - radio  - television  - brochure/flier
   - by mail  - Website  - Word of mouth

5. Are you a friend or relative of someone in the chorus?
   - Yes  - No

6. What is your age? _____  Sex:  - Female  - Male

Please complete the other side of this card.
Thank you.
Keys to Survey Success

• Goal: Reliable data. Develop and stick to a plan!

• Shorter is better—higher response rate, tend to be used more

• On-site survey to capture full audience (email survey, e.g., SurveyMonkey, captures ticket buyers/members only)
Taking Out the Guesswork provides guidance on using research to support:

Case studies and guidelines for each

1. Learning about Audiences
2. Creating Effective Promotional Materials
3. Tracking and Assessing Results
Examples and effective practices from ten multi-year studies of Wallace grantees and research literature
Case examples highlight steps in using research strategically
Case examples cover common questions

- How Can We Get More First-Timers to Return?
- What Are They Coming For?
- Are We Attracting/Engaging New Audiences?
- Why Aren’t They Coming?
- Can We Get Audience Input If We Can’t Afford Focus Groups?
- What Gets the Attention of a Busy Audience?
- How Can We Combat Stereotypes about Us?
- Who’s in the Audience?
- How Can We Become Relevant?
- Why Aren’t They Coming?
Each chapter also includes guidelines for how to conduct research.
An appendix includes tools used such as surveys and focus group guides.
Lessons learned by organizations are included as tips and pointers throughout.

“It takes time to figure it out. You’re going to make a lot of mistakes.” Clay Studio Vice President Jennifer Martin
Other keys to successful research: involve artistic and other leaders early

Peter Boal on what he heard in focus groups: “They want to feel welcome.”
Guidebook, case studies and more for free download at www.wallacefoundation.org