



Transforming Arts Organizations Worldwide

Research Preview: **COMING BACK STRONGER**

January 2021

Agenda for our Time

01

WELCOME
ABA and
context

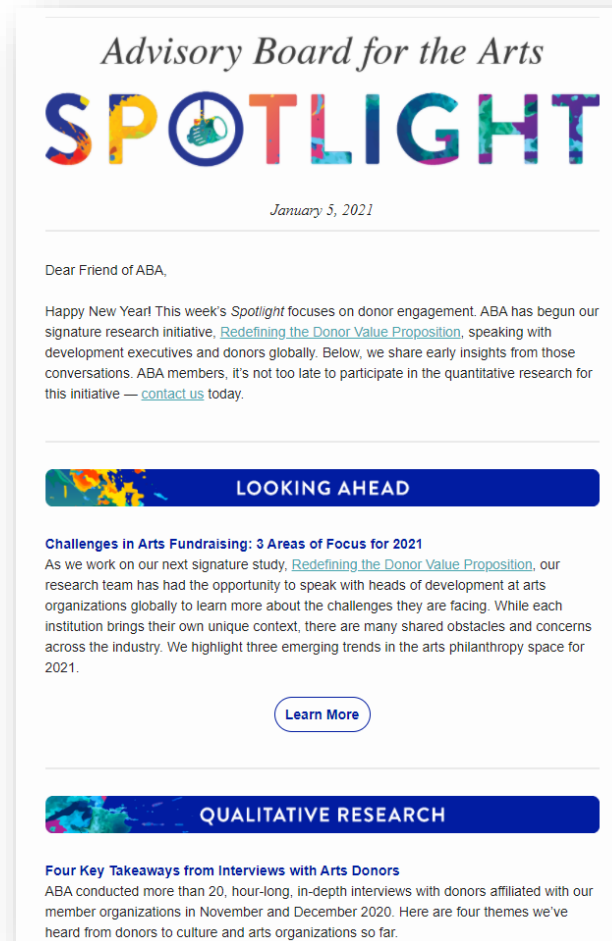
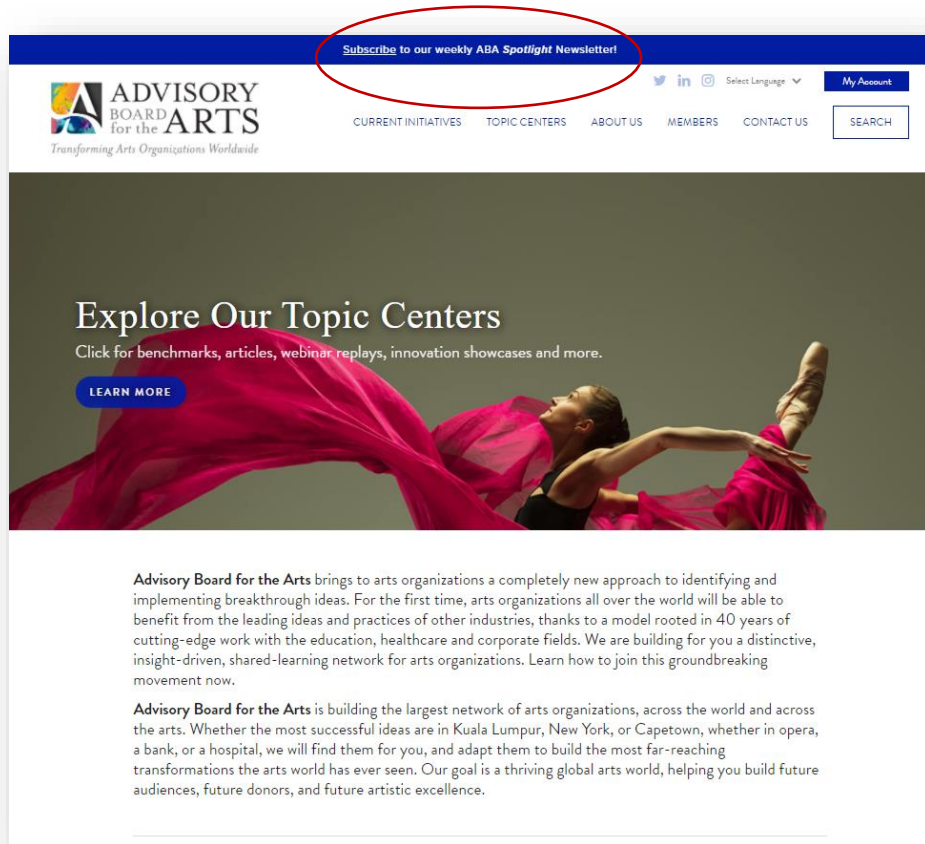
02

DRIVING
LOYALTY
Why we are talking
about audience
loyalty now

03

DATA DIVE
Orchestra-
specific data

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- Each week we focus on a new topic of interest to the arts.
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A Global Network at the Ready



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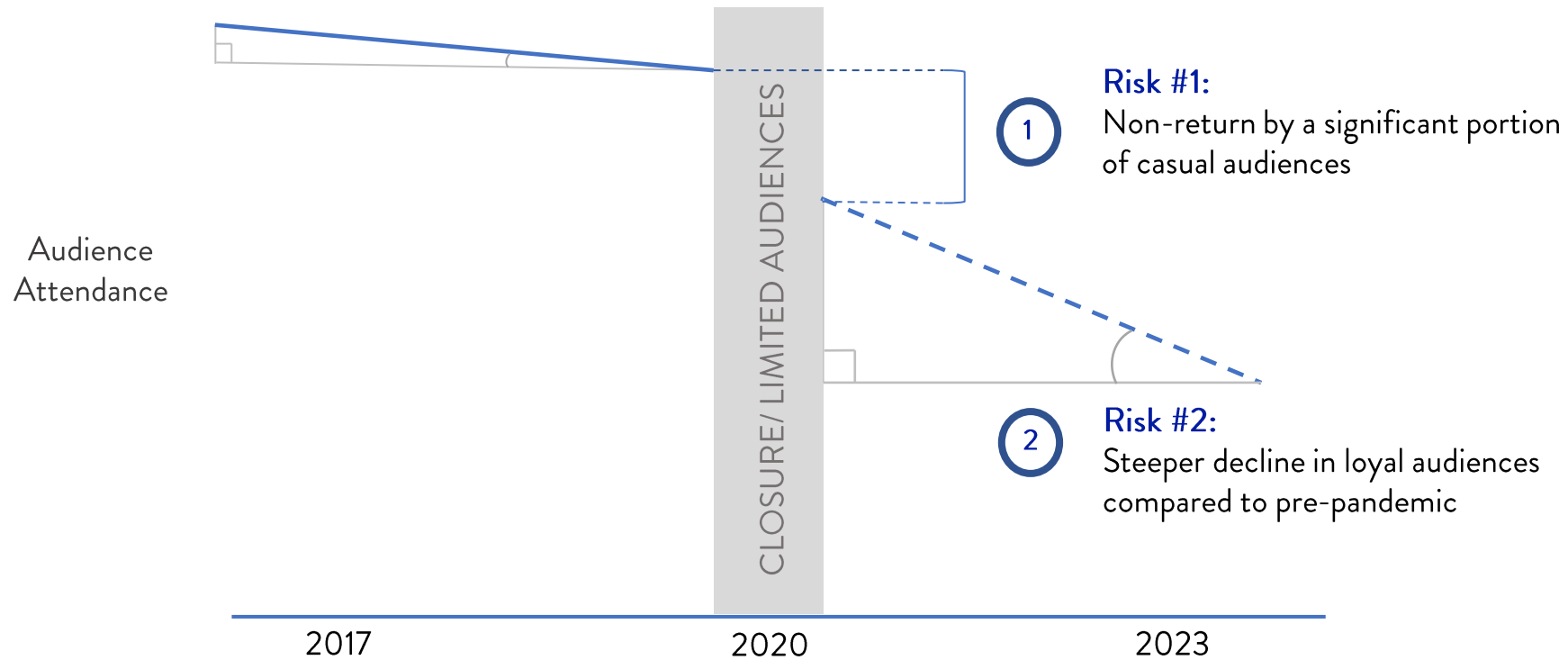
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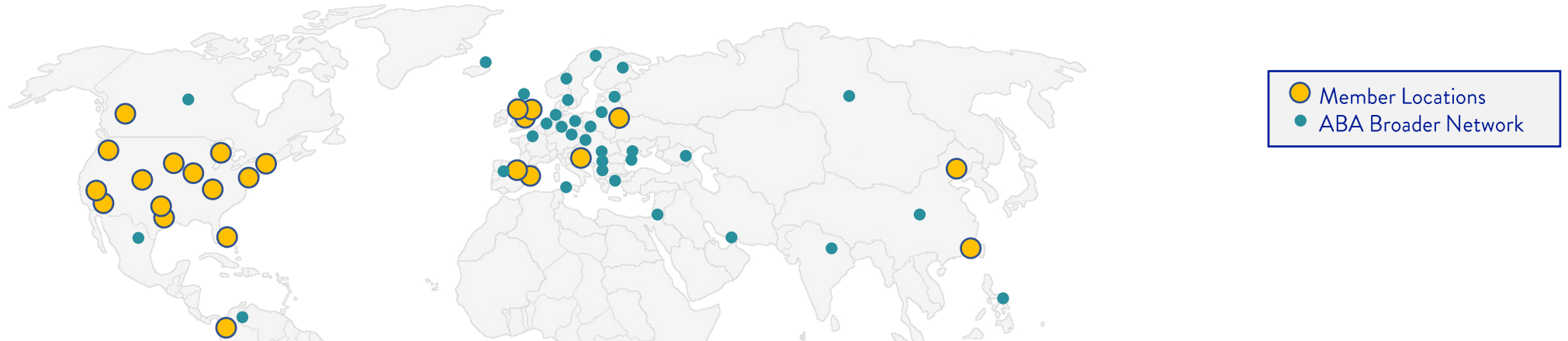
The Risks to Return Post-Pandemic Are Real

Post-Pandemic Risks to Audience Loyalty at Arts and Culture Organizations



Source: ABA research.

A Global Source of Data from ABA Members and Research Partners



● Member Locations
● ABA Broader Network

Collaborations

Independent Research



The New Loyals Data Collection

“Jobs to be done” interviews, market research and in-depth survey with 5,000 responses from broad range of arts attendees



LaPlaca Cohen



Culture + Community In a Time of Crisis Survey

125,000+ responses to survey about arts and culture during Covid-19, normed to US population



Brand Loyalty Analysis

125 interviews with 23 consumer brands, survey of 10,000 consumers from 16 categories and 73 brands in the US and UK.



Digital Consumption of Arts & Culture Interviews

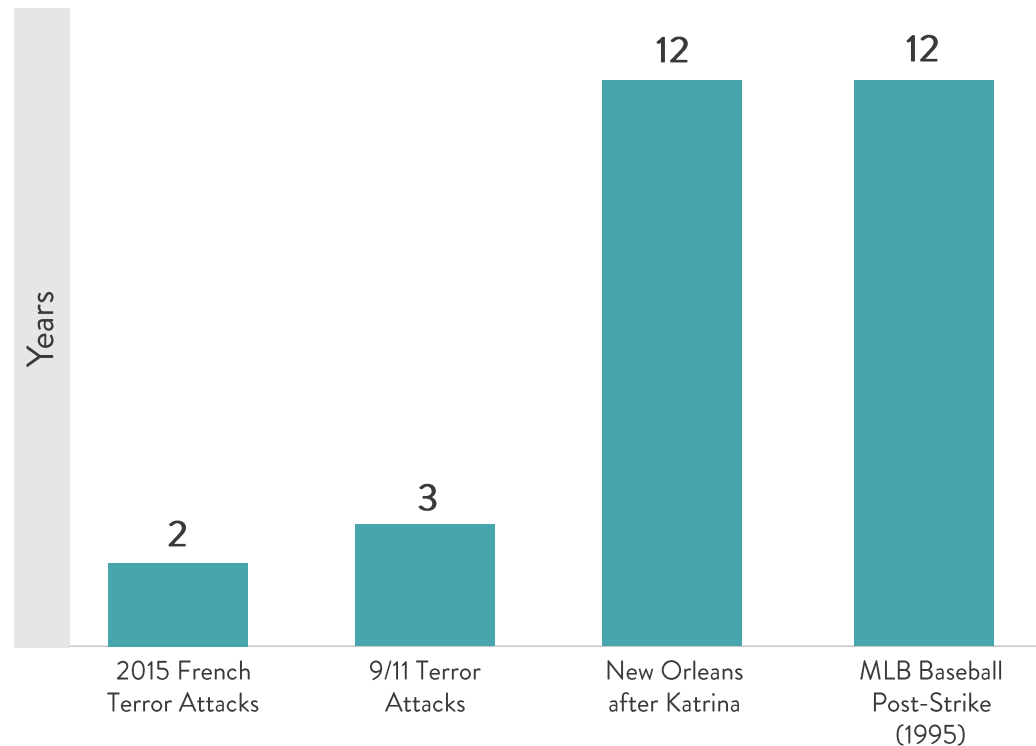
In-depth “jobs to be done” style interviews with current consumers of arts organization digital offerings

Global Scan of Arts & Culture Digital Output

Broad review of arts organization and artist digital offerings, cross-genre

Disruptions Have a History of Changing Behaviors

Time To Visitor Recovery Post Incident



What Determines Likelihood of Returning to Old Habits After Disruption?

- How frequent and rigid is the new behavior compared to the old behavior?
- How strong and disciplined was the original habit?
- How much does the habit depend on context? (social context, technology changes)

For most, arts consumption habits were not strong pre-pandemic and there are now many culture and entertainment replacements

Sources: [EDN Hub](#), [US Dept of Transportation](#), [Baseball Reference](#), [New Orleans CVB](#)

Sources: <https://lrwonline.com/perspective/consumer-psychology-and-coronavirus-turning-new-habits-into-opportunities/>
<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC7269931/>

We Can't Count on Audiences To Predict Their Own Behavior

When performing and visual arts audiences were asked in 2009 about the likelihood of the economy affecting their ability to return after the financial crisis, their expectations were far more optimistic than the reality two years later.



Source: [Culture Track 2011](#)

The Risk Is Not the Same for All Audiences



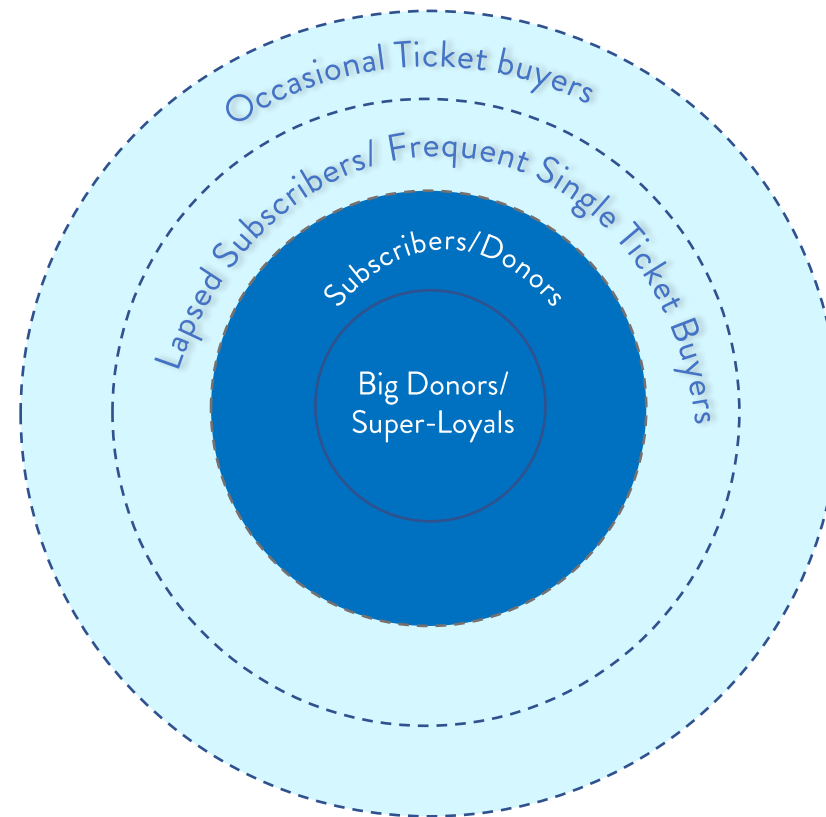
Loyals

More Likely to Consume Our Current Offer

Digital content frequently repackages the in-person experience in a home-friendly way, which is exactly what “Loyals” want.

More Likely To Return on Their Own

For a large minority of your audience, your artform or cultural genre is intrinsically valuable. They would likely return no matter what you do during closure.



Not-Yet-Loyals

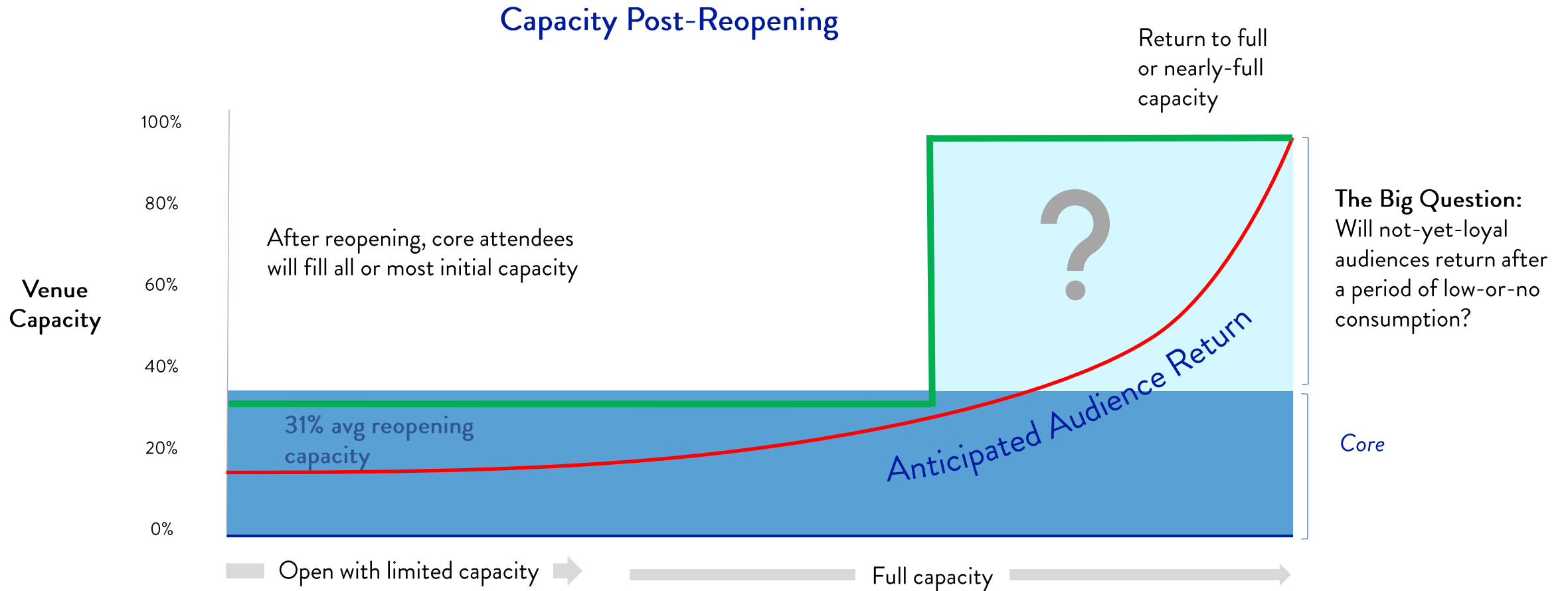
Less Likely to Consume Our Current Digital Offer

Most arts and culture organizations (79%) tell ABA that their digital efforts are directed at all existing audiences, but not-yet-loyals are significantly less likely to consume.

More Likely To Diverted from the Arts

Because they’re less attached to the arts, single ticket buyers are more susceptible to distraction and change during closure.

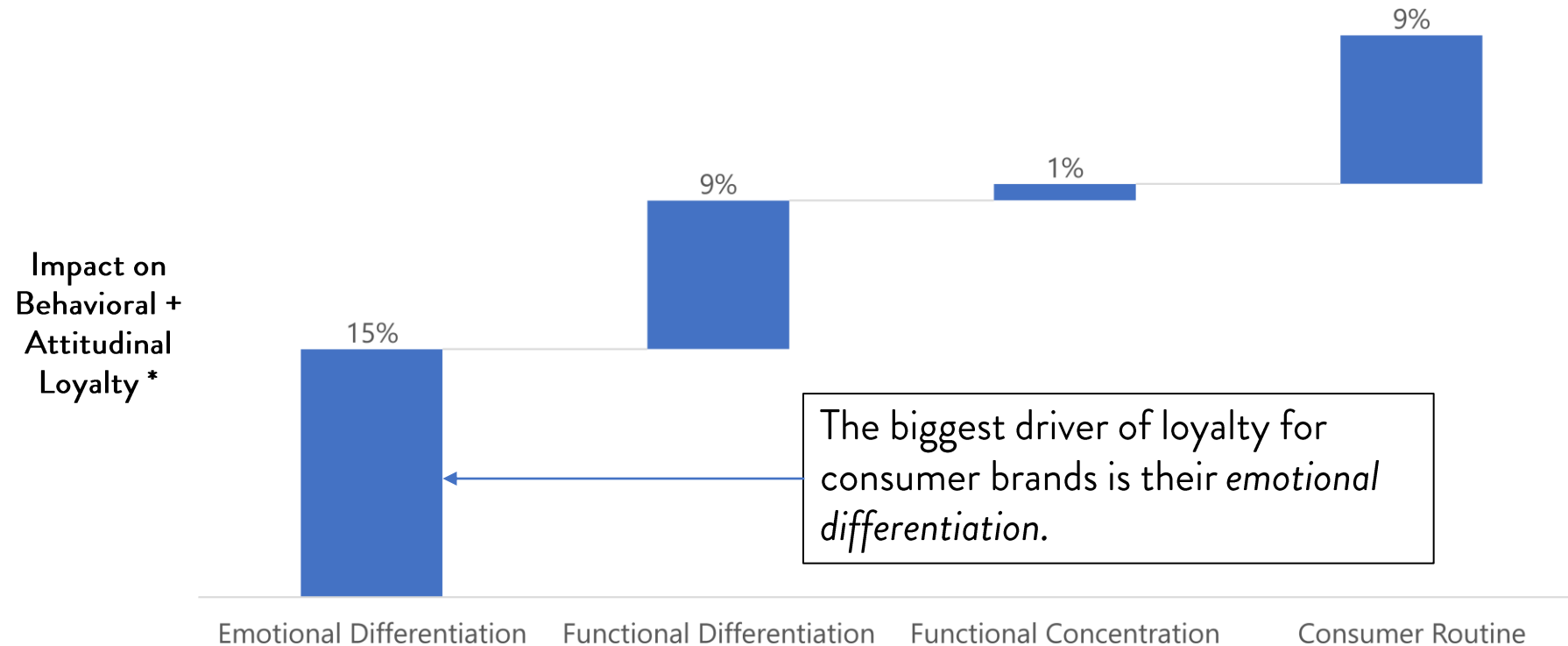
We Particularly Need to Secure Casual Audiences



Source: ABA research; segment analytics of ABA's arts motivation survey.

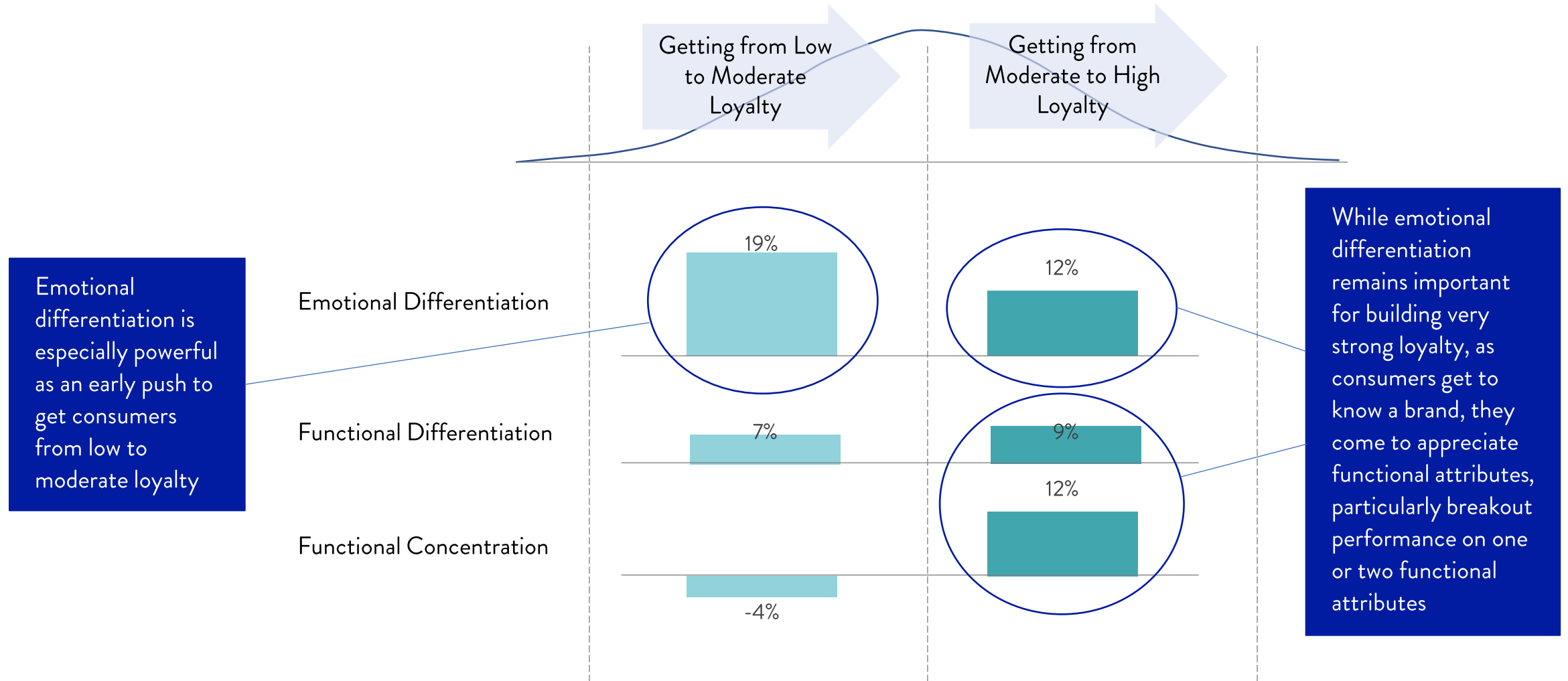
The Key to Boosting Brand Loyalty is 'Emotional Connection'

Relative Impact on Loyalty of Brand Attributes



* Measured as Impact of Moving from 25th to 75th Percentile Performance on Each Driver. N = ~10,000 consumers. Loyalty defined by behavioral measures (share of requirements, price premium, intent to repurchase) and attitudinal measures (willingness to recommend, word-of-mouth quality, satisfaction and self-identified loyalty). Source: CEB

Emotional Connection Matters as a Way To Build Initial Loyalty



For 33% Of Audiences, Functional = Emotional

Motivational Segments from ABA Audience Research

For 1/3 of your audiences, the functional attributes of the performance are easily translated into what they value because what they care most about is what's on stage. The art form is part of their identity.

33%: Arts Lovers

14%: Arts Passionates

19%: Quality Seekers

Further from the Stage

Closer to the Stage

For the Remaining 66%, Values Further From the Stage

66%: Looking for Something Else

12% Social Samplers
Try something new

9% Culture Surfers
See popular/famous works

14% Conversational Challengers
Converse, challenge preconceptions

9% Willing Companions
Support friends/family

11% Civic Stewards
*Fulfill duty to the arts,
create community*

13% Mastery Builders
Gain expertise

For 2/3 of your audiences, the art form requires translation to what they value most.

Further from the Stage

Closer to the Stage

A Journey from Functional Benefit to Shared Value

Higher Order



Level of Emotional Connection



Lower Order



Functional Benefit

Generating excitement around specific functional aspects of the performance or exhibit

Examples:

- Famous guest artist
- Composer/conductor
- Where/when



Emotional Benefit

Drawing attention to an emotional benefit of attending

Examples:

- Escape from day-to-day
- Experience range of new emotions
- Visit new destinations



Shared Value

Connecting your purpose to beliefs that your target customer holds dear

Examples:

- “Find your greatness”
- If you have a body, you are an athlete



Characteristics of a Shared Value and Examples

EMOTIONAL

Based on feeling and emotions, rather than programmatic attributes

HIGHER ORDER

Must have meaning in the consumer's broader life, not just in his/her interaction with the product category

RELEVANT





Must be relevant to the consumer and the product category

CREDIBLE

Reflects something the the brand genuinely embodies or supports

DIFFERENTIATED

Stems from the qualities that make a brand truly unique

 <p>Dove exists to celebrate every woman's unique beauty.</p>	 <p>Ballet Austin exists to encourage lifelong health and wellbeing.</p>	 <p>The Barnes exists to give people from all walks of life access to the transformational improvement possible through appreciation of the arts.</p>	 <p>Orchestra of the Americas exists to catalyze social transformations in diverse, underprivileged communities</p>	 <p>Woolly Mammoth exists to foster radical inclusion and fight for those whose identities and experiences are marginalized and belittled.</p>
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Source: *Grow: How Ideas Power Growth and Profit at the World's Greatest Companies*, Jim Stengel, 2011.

Building the Purpose-Driven Arts Organization

Things You Can Do Right Away

Things That Require More Stakeholder Buy-In

Emotional marketing used as a tactic

Translate functional aspects of programming into emotional benefits

Communicate existing education & community engagement to audiences

Digital organized by themes with an emotional experience

Shared values as a societal brand promise

Identify a shared value that you stand for (or want to earn the right to stand for over time)

Use the shared value as a common thread through all marketing communications

Shared values as an aligned organization-wide strategy

Champion shared value across all aspects of the organization, including:

- Programming
- Community engagement
- Marketing
- Development
- Talent management

Shared values as an organization-led movement

Choose external partners based on their interest in building a similar vision of the future.

Champion your shared value across traditional stakeholders and beyond.

Identify and support shared-value advocates.

Program-Based Marketing (Pre-2018)



- *Focus:* Programmatic details
- *Origin of Campaign:* Long-standing approach to promote upcoming concerts
- *Outcome:* Not memorable; not often sourced as how attendees heard about a concert

A Structured Approach to Identifying Deep Feelings

Pre-Interview Request

Identify a set of 10 images that represent that the symphony to you, but do not include any pictures of the symphony, musicians, or instruments.



This form of interviewing is known as the [Zaltman Metaphor Elicitation Technique \(ZMET\)](#).

Components of Interview

Storytelling

Ask interviewee to explain how each picture represents their thoughts and feelings about the symphony.

Missing Pictures

Ask interviewees if there were ideas or feelings they wanted to express but could not find an appropriate representative image.

Triad Task

Select three pictures at random. Ask interviewee to explain how two of the pictures are similar but different from the third.

Sensory Metaphors

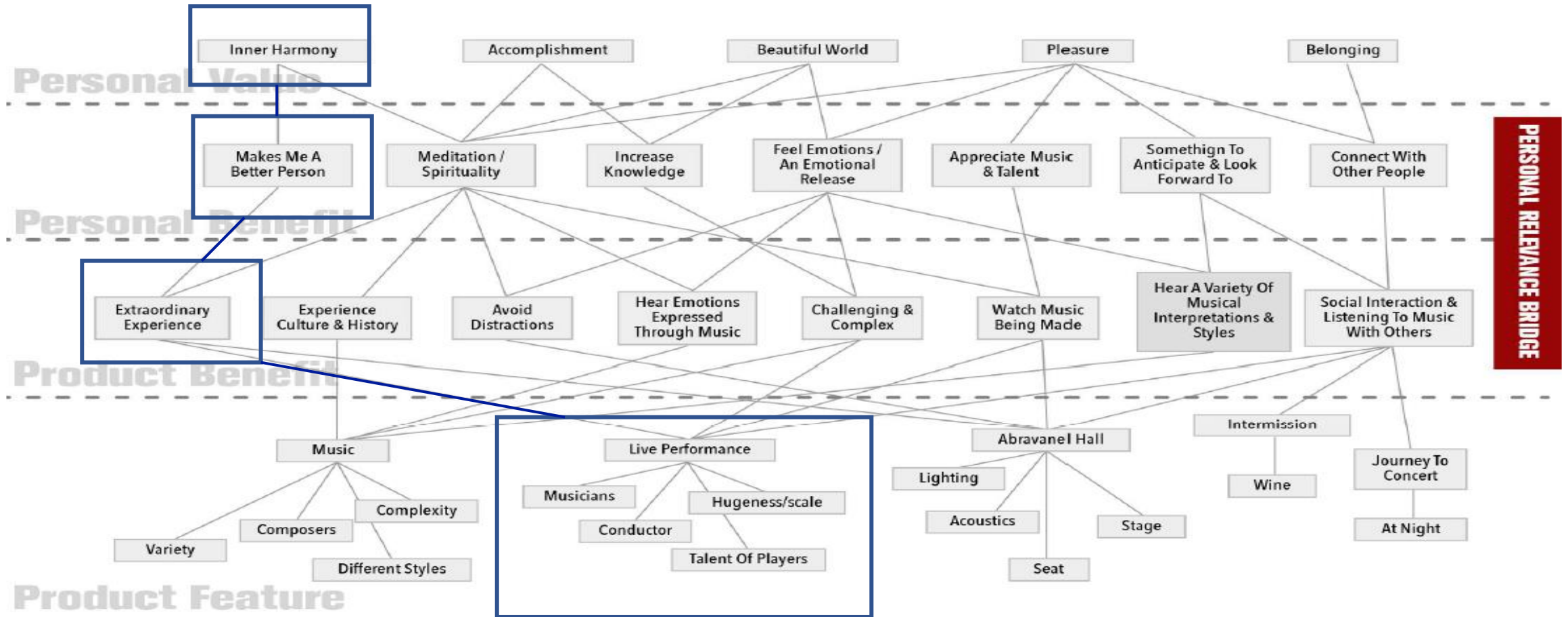
Ask interviewees to express their ideas using various sensory images. For instance, ask what is (and what is not) the color, smell, or touch of the symphony.

Additional Probing Techniques

To encourage interviewees to elaborate on their thoughts more fully, continue probing on pictures. For example, ask them to tell you what else might be in a picture if the frame was extended.

Artifact: Utah Symphony's Complete Values Map

Utah Symphony's Values Map



Use Values to Design Emotionally Resonant Marketing

Examples of Utah Symphony's Values-Led Marketing Campaigns

Value: Accomplishment



Value: Beautiful World



Value: Inner Harmony



Why it works:

Signals how the symphony supports learning and personal development through challenging and complex performances.

Signals how the symphony creates the opportunity to experience culture and history and provides an extraordinary experience.

Signals how the symphony provides an opportunity to avoid distractions and connect with your spirituality.

Impact of Values-Based Marketing

Changes between 2017-2018 and 2018-2019

7% increase in Utah Symphony's Masterworks Series ticket sales

16% increase in Utah Symphony's Masterworks Series revenue

18% increase in reactivated ticket buyers

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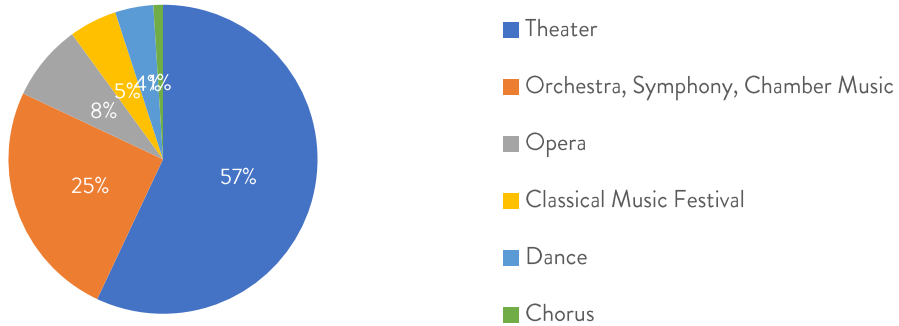
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Overall Survey Participants

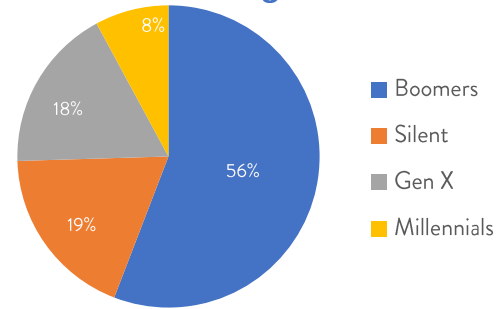
OVERALL RESULTS

Survey participants N=4,752

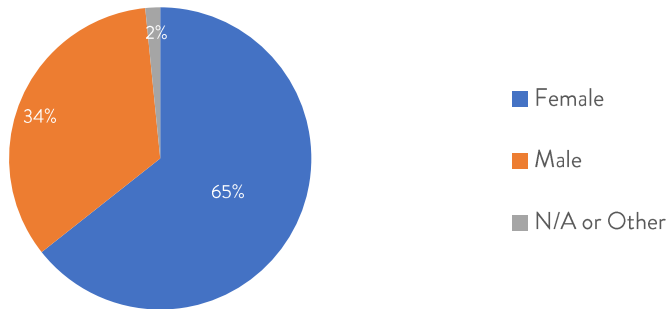
Genre



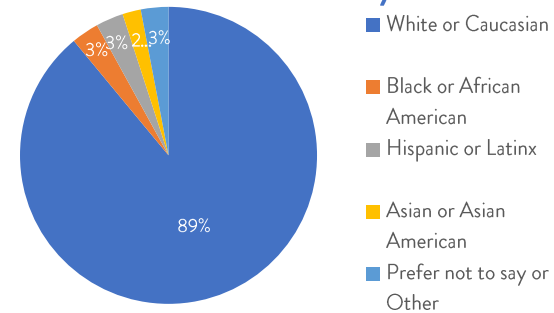
Age



Gender



Ethnicity

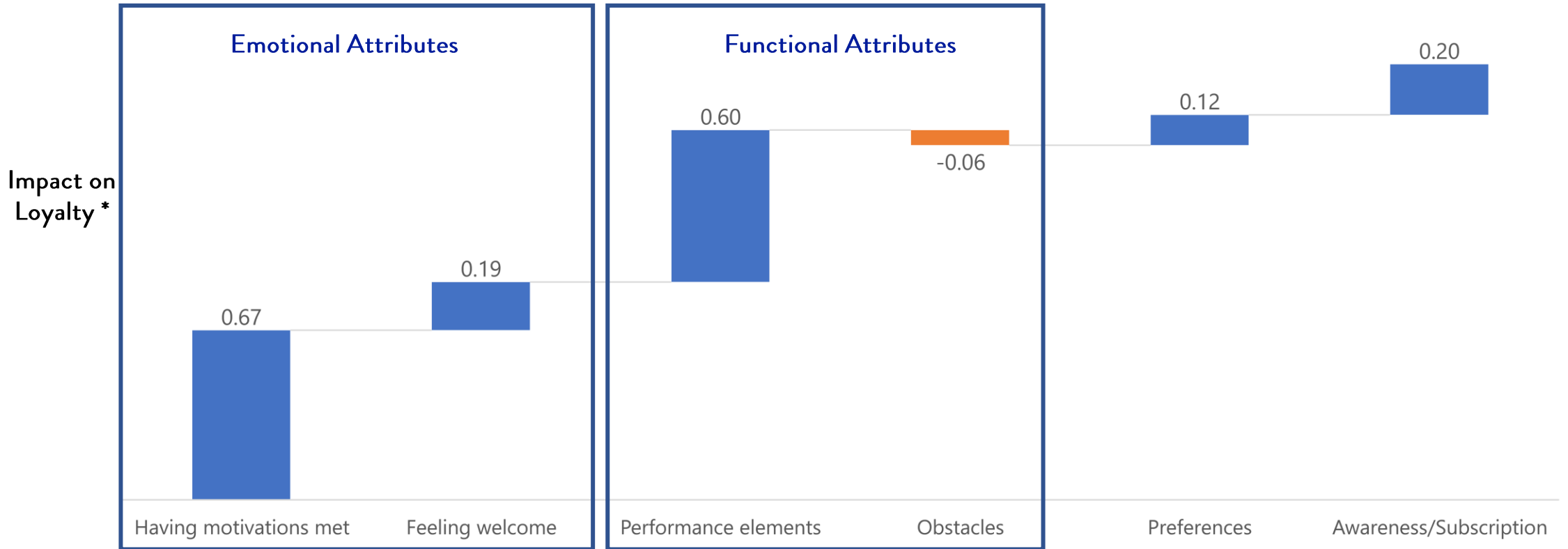


Baby Boomers = 55-73 years old, Silent Generation = 74-91 years old, Gen X – 39-54 years old, Millennials = 23-38 years old

Emotional Attributes Drive Loyalty in the Arts

OVERALL RESULTS

Relative Impact on Recommendation**

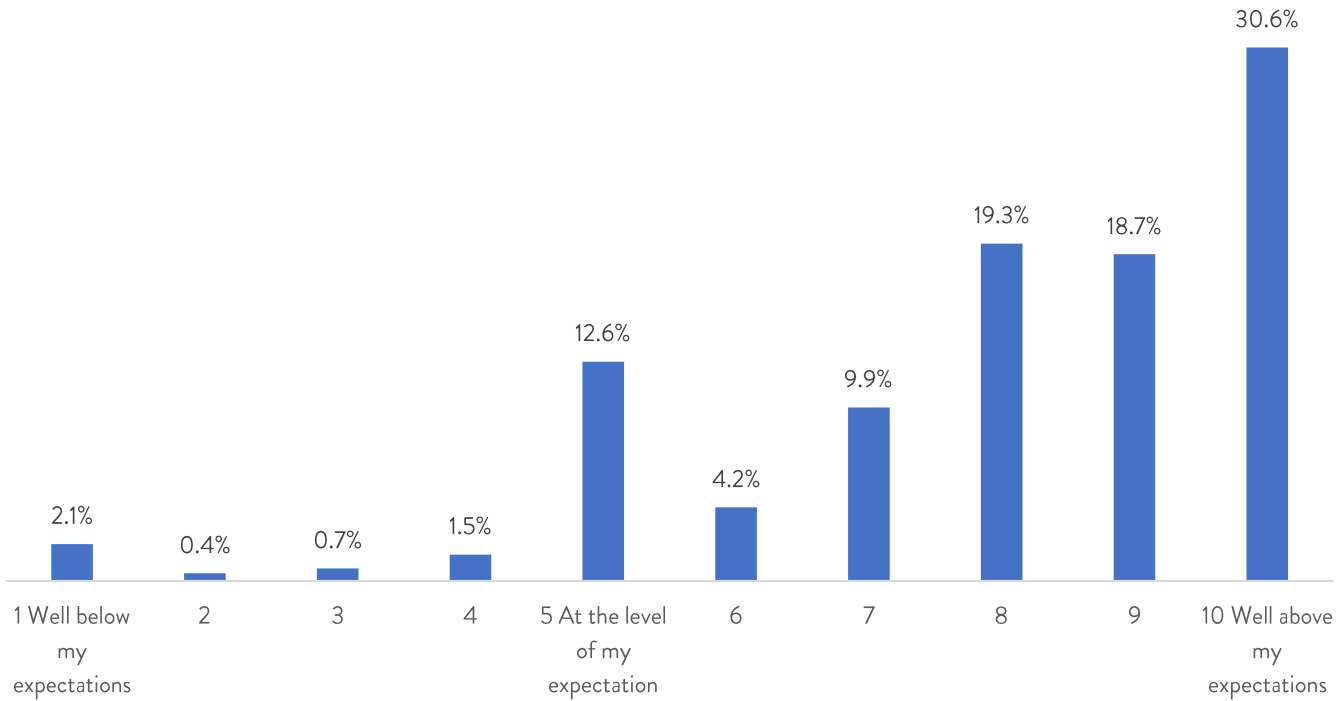


* Measured as impact of moving from 25th to 75th percentile performance on each driver. N = ~5,000

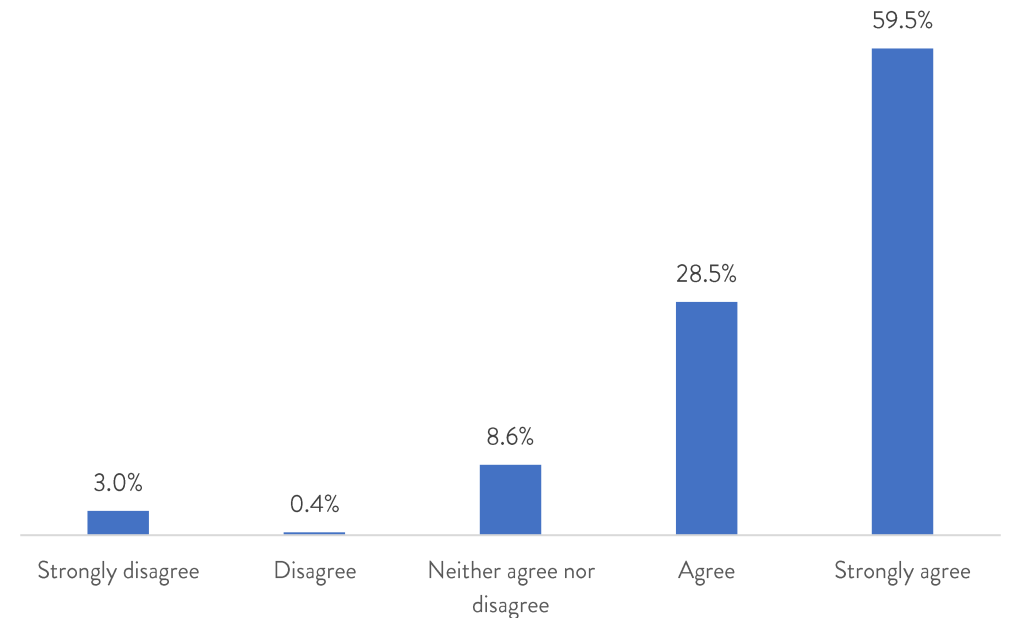
**Performance elements = rating of things like performers, composition, staging, seats, staff service, value for money. Preferences refers to interest in challenging or familiar art, or desire to know behind-the-scenes details. Genre was also relevant to recommendation but similarly high for all and uncontrollable, so we did not include it above.

Drill Down: Motivations and Welcoming

Rank #1 Motivation Reality v. Expectation (N=1139)

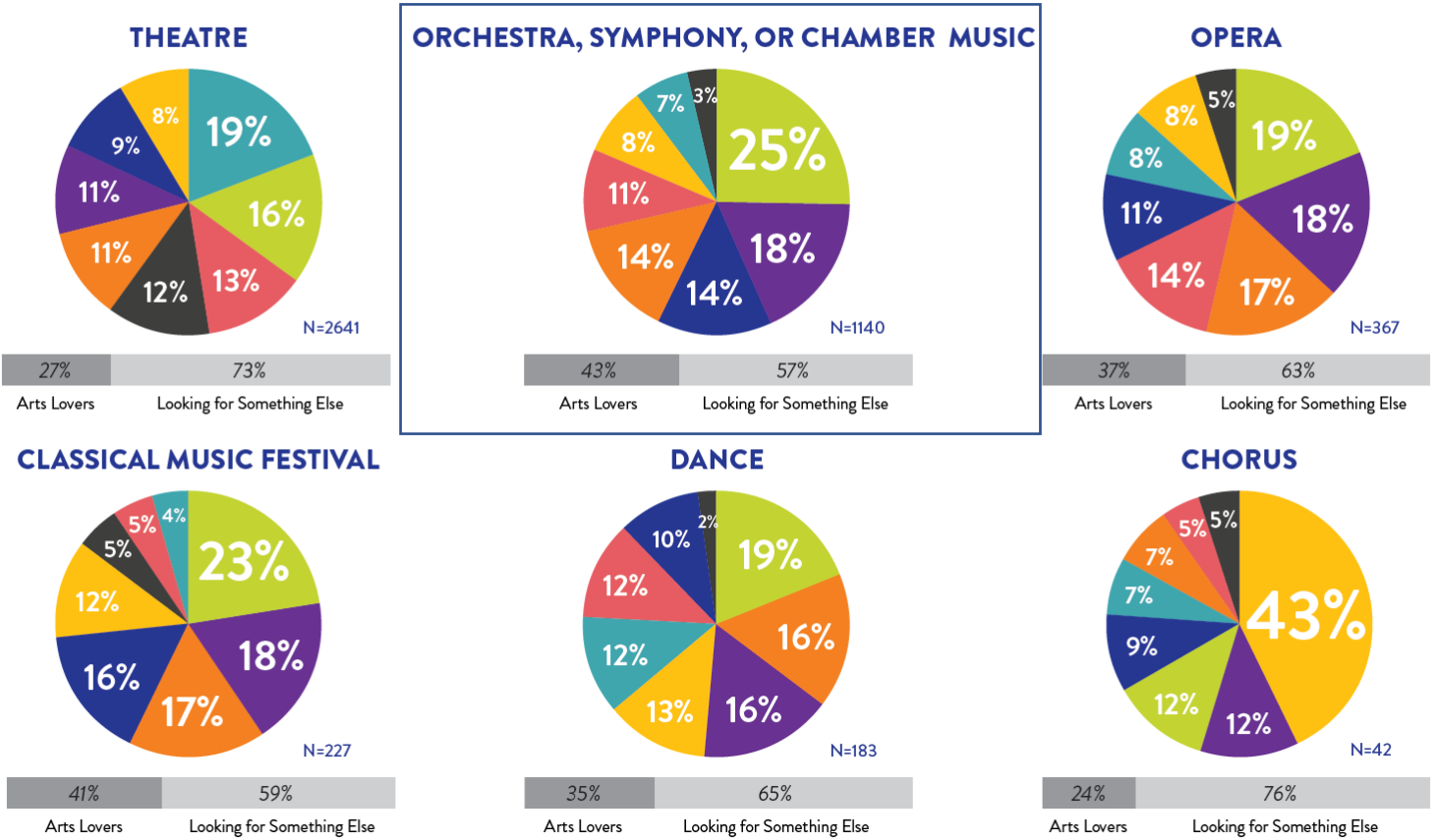
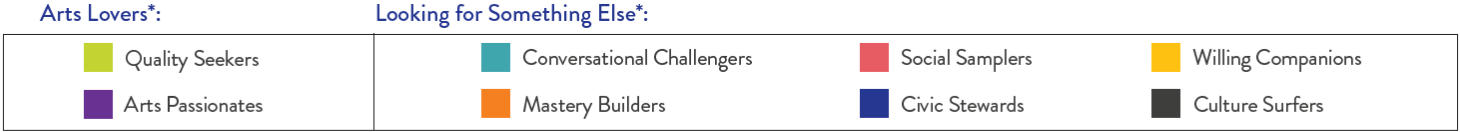


Feeling Welcome at the Performance (N=1139)



Segment Variation Across Genre

OVERALL RESULTS

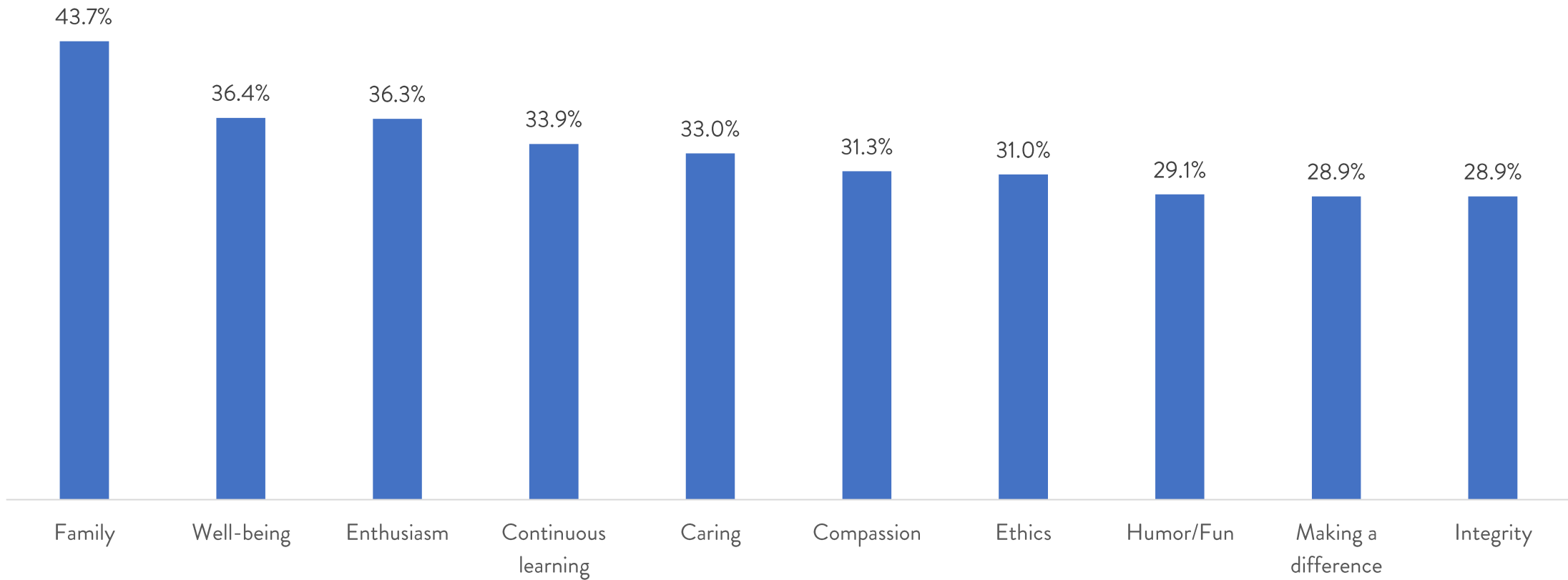


In the overall distribution – combining all genres (N=4600) – 33% of audiences are 'Arts Lovers' and 66% are 'Looking for Something Else' from the performance.

Top 10 Values of Symphony Patrons

ORCHESTRA
RESULTS

Values that Most Reflect Your Patrons
(N=1139)



Data All Housed in Our Arts360 Tool

General Info karen.freeman@advisoryboardarts.com

Gender: Male
 Birth Date: 6/9/2006
 Age: 23
 Marital Status: Single
 Political Ideology: Likely Liberal
 Registered to Vote: Y

Gender: Male
 Birth Date: 6/9/2006
 Age: 53
 Marital Status: Married
 Political Ideology: Likely Liberal
 Registered to Vote: Y

Gender: Female
 Birth Date: 6/9/2006
 Age: 54
 Marital Status: Married
 Political Ideology: Likely Liberal
 Registered to Vote: Y

L2 ConsumerMapping Cart (0)

General Characteristics

- Household Finances (1)
 - Estimated Income
 - Household Net Worth (1)

Category	Count	Percentage
A--Less Than \$1	0	00.000%
B--\$1 To \$4999	0	00.000%
C--\$5000 To \$9999	0	00.000%
D--\$10000 To \$24999	0	00.000%
E--\$25000 To \$49999	0	00.000%
F--\$50000 To \$99999	0	00.000%
G--\$100000 To \$249999	0	00.000%
H--\$250000 To \$499999	0	00.000%
I--\$500000 And Higher	19,390	100%
Unknown	0	00.000%
- Presence Of Credit Card
- Presence Of Gold Or Platinum Credit Card
- Presence Of Premium Credit Card
- Presence Of Upscale Retail Credit Card
- Presence Of Bankcard
- Gas Dept Retail Credit Card
- American Express Credit Card
- Credit Rating
- Household Number Lines Of Credit
- Credit Range Of New Credit
- Investments--Estimated Real Properties Owned
- Children In Household
- Adults Within Household
- Interests And Buying Habits Within Household
- Household Contribution Patterns (1)
 - Charitable Contributor
 - Donor Animal Welfare
 - Donor Arts Cultural (1)

Category	Count	Percentage
Unknown	0	00.000%
Yes	19,390	100%
 - Donor By Mail
 - Donor Childrens Causes
 - Donor Environmental
 - Donor Environmental Issues

Map Controls

- Boundaries
- Shapes

Universes

- Universes
- Purchased
- Exports

Data Sources

- L2 US Commercial
 - Area Selections
 - Telephone
 - Individual Characteristics (14)
 - Gender
 - Age
 - Marital Status
 - Occupation Group
 - Occupation Of Person
 - Ethnic Code
 - Ethnic Group
 - Hispanic Country Of Origin (14)

Country	Count	Percentage
Bolivia	48	00.344%
Brazil	100	00.717%
Chile	0	00.000%
Colombia	29	00.208%
Costa Rica	2	00.014%
Cuba	111	00.796%
Dominican Repub...	18	00.129%
Ecuador	8	00.057%
El Salvador	133	00.953%
Guatemala	11	00.079%
Honduras	5	00.036%
Mexico	12,385	88.781%
Nicaragua	0	00.000%
Panama	0	00.000%
Peru	26	00.186%
Puerto Rico	1,073	07.692%
Spain	0	00.000%
Unknown	0	00.000%
Uruguay	0	00.000%
Venezuela	1	00.007%
 - English Language Assimilation

6 Key Takeaways

- Our ability to recover quickly and sustainably from the pandemic depends on our ability to bring back not-yet-loyal audiences to our venues when it's safe.
- There's a clear lesson from consumer brands about how to increase the loyalty of casual buyers—emotional differentiation.
- The most intense form of emotional differentiation, and therefore the most successful at building loyalty, is connection around shared values that both we and our audiences both believe to be part of “who we are.”
- Anything we can do right now to connect emotionally and communicate the impact of our community engagement efforts to audiences represents an advance over our current programming-dominant approach
- That said, the biggest benefits come when our work transcends marketing, and we become known in the market as a champion for a higher-order shared value whom audiences can rely on to help them make progress in their lives
- Now is an especially opportune time to begin, not only because of the urgency of our need, but also the void left by lack of in-person programming, and the range of emotional needs that exist for audiences in quarantine

Thank you!

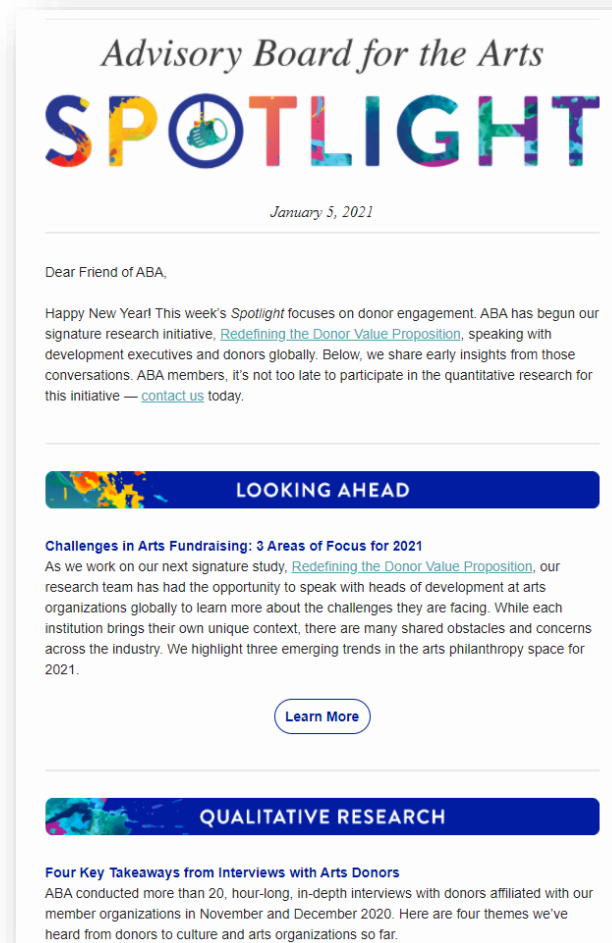
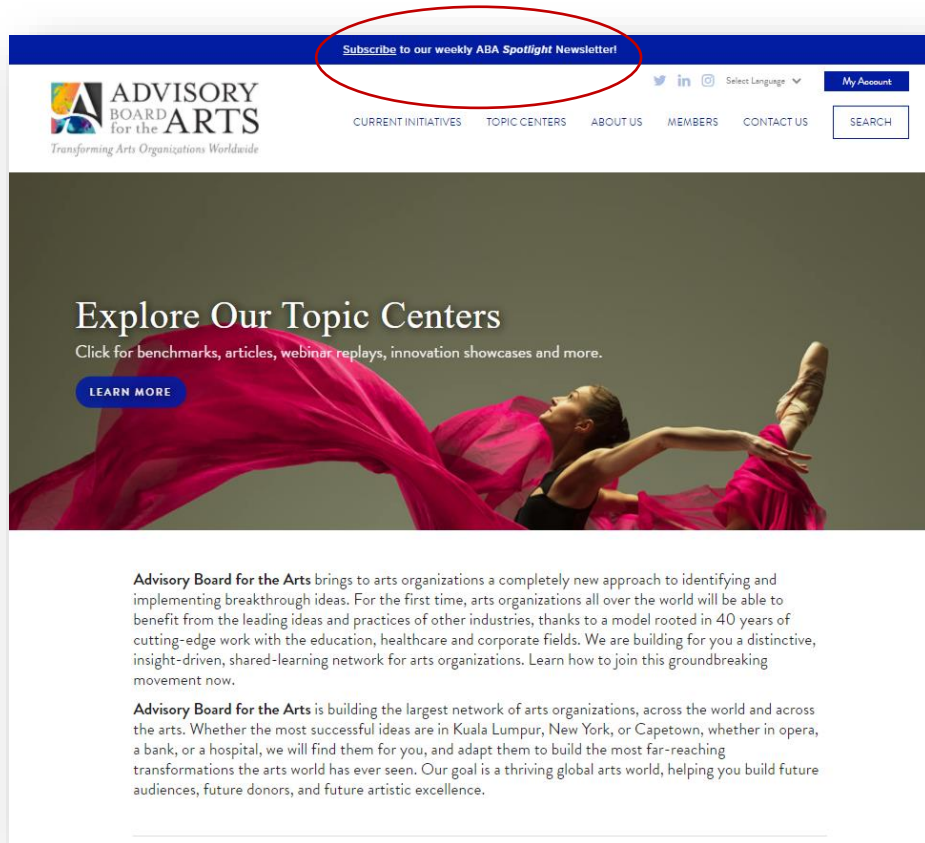


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