



Putting the audience in the center of it all.
An Initiative of The Arthur M. Blank Family Foundation

Roundtable Evaluation Research and Analysis

Wave 2: March 2019



BOB HARLOW
Research and Consulting

180 W Houston St, Suite 11A, New York, NY 10014 • 212-931-0149 • www.bobharlow.com

CONTENTS

EXECUTIVE SUMMARY..... iv

EVALUATION PURPOSE & EVALUATION QUESTIONS..... 1

FINDINGS.....7

ENGAGEMENT7

KNOWLEDGE9

BEHAVIOR.....12

ORGANIZATIONAL IMPACT18

AUDIENCE-BUILDING IMPACT22

REPORTING REQUIREMENT25

THE ATLANTA ARTS COMMUNITY.....27

THE ROUNDTABLE MEETINGS31

APPENDICES36

APPENDIX I: PERCENTAGE OF BUDGET SPENT ON MARKETING.....36

APPENDIX II: SURVEY RESPONDENT PROFILES37

TABLE OF FIGURES

Figure 1. Theory of Change.....4

Figure 2. Length of Participation and Regularity of Roundtable Meeting Attendance7

Figure 3. Roundtable Attendance per Organization and Overall Participation Satisfaction7

Figure 4. Meeting Utility8

Figure 5. Member Motivations for Roundtable Participation9

Figure 6. Perceived Knowledge.....10

Figure 7. Optimism11

Figure 8. Experimenting with New Ways to Grow Audiences12

Figure 9. Monitoring Social Media.....13

Figure 10. Collecting and Using Data.....14

Figure 11. Marketing Investments of Roundtable Organizations vs. Nationwide Organizations.....15

Figure 12. Audience-Engagement Investments: Roundtable vs. Arts Managers Nationwide16

Figure 13. Return on Audience-Engagement Investments: Roundtable vs. Arts Managers
Nationwide17

Figure 14. Data Hygiene18

Figure 15. Leadership Response to the Roundtable19

Figure 16. Leaders Speak Often About Audience-Building19

Figure 17. Leader Reaction to Roundtable Meetings20

Figure 18. Devoting Resources to Audience Building21

Figure 19. Allocating Sufficient Resources to Audience Development.....22

Figure 20. Understanding the Target Audience.....22

Figure 21. Audience Growth and Loyalty23

Figure 22. Earned Income24

Figure 23. Repeat Attendees.....24

Figure 24. Response to Quarterly Reporting25

Figure 25. Relationships Among Atlanta Arts Organizations27

Figure 26. Frequency of Sharing Advice with Staff in Other Organizations29

Figure 27. Frequency of Cross-Organization Collaboration30

Figure 28. Ranked Effectiveness of Roundtable Activities.....32

Figure 29. Environment at Roundtable Meetings34

EXECUTIVE SUMMARY

THE AUDIENCE BUILDING ROUNDTABLE

This research examines the impact of the Audience Building Roundtable, an Arthur M. Blank Family Foundation initiative, in its second full calendar year. The Audience Building Roundtable is an ongoing forum of marketing and other staff from 49 metro Atlanta nonprofit arts groups. It was created to increase Atlanta arts organizations' focus on and responsiveness to audience interests, helping them to build new relationships and deepen existing ones. At monthly meetings, Roundtable members hear about audience growth and retention strategies from arts and marketing experts, and discuss these ideas and their own implementation projects in presentations and peer-group discussions. Participants can receive grants and conference scholarships that further support learning and experimentation. They also share results of their own audience-building efforts at the monthly convenings, as well as in blogs, newsletters, and podcasts that are maintained on a central website.

An evaluation completed in early 2018, covering the initiative's first 20 months, identified several improvements in Roundtable participants' self-reported knowledge, attitudes, and behaviors since the initiative began. In this first evaluation, members reported that they knew more about how to build audiences and how to use data to carry out the work. They also said they were collecting, monitoring, and using data more, and implementing a larger number of novel ideas, than in the past. New investments in audience development focused on trying out different marketing strategies and data-driven audience tactics. Roundtable members saw a modest increase in ticket sales following those investments, although their organizations continued to rely just as heavily on contributed income. Participants also reported that the arts community was stronger, with more active peer networks, greater resource sharing, and increased collaboration across organizations.

That first evaluation was also designed to elucidate and examine a theory of how the Roundtable produced change. The assessment concluded that several components work together to promote a culture of experimentation and growth in knowledge, attitudes, and behaviors.

- The workshops led by outside experts provide ideas that are deployed by members, sometimes with the assistance of grants.
- An egalitarian, judgment-free, professionally facilitated atmosphere fosters formal and informal sharing of ideas, tactics, and results among member organizations.
- That sharing in turn prompts other members to attempt their own experiments, by not only providing new ideas, but also showing the value of experimentation and creating a community where failure is not judged.

The Roundtable has continued in 2018 with two key changes in requirements. First, an attendance policy initiated at the beginning of the year mandates that one representative of each member organization attend each of the eleven meetings that year, at least one board member from participating organizations attend at least three meetings, and the executive director or CEO attend six. In addition, members were asked to report audience and financial metrics each quarter.

EVALUATION PURPOSE

This follow-up study examines changes in self-reported knowledge, attitudes, behaviors, and results since that first evaluation, corresponding to the 2018 calendar year. These questions were explored in an analysis of program objectives, activities, and outcomes as revealed by program documents, in-depth interviews, and a survey of Roundtable members.

FINDINGS AND CONCLUSIONS

Over the past year, the Audience Building Roundtable has solidified progress made by members in the previous 20 months. Audience-building activities are becoming increasingly second nature to them.

- In the 2018 evaluation, members reported greater (self-reported) awareness of audience-building strategies and understanding of how to use data. One year later, those levels remain high.
- They also previously reported more-frequent monitoring and deploying of data to grow their audiences than in the past, and those levels held steady during this wave, and show signs of inching higher.
- They initially reported testing out more new ideas, and made investments in marketing and data-driven audience-building initiatives that showed some financial return. These trends continue.
- Members also indicated in the first evaluation that the Atlanta arts community was stronger. Organizations were becoming less competitive and more open and collaborative. Moreover, arts organization staff reached out to other arts groups to share expertise and collaborate at much higher levels than in the past. Those trends are still present in this second evaluation a year later.

The Roundtable has clocked additional gains over the past year:

- Members are even more confident in their ability to use data—47% now strongly agree they know how to employ data to grow their audiences, up from 28% last year, and the number who say they use data for targeted campaigns is trending upward.
- Audience building has taken on a higher priority: Members are more likely to say their organization focuses its expense budget, energy, and attention on attracting target audiences than at the start of the Roundtable.
- In line with the Roundtable's focus on audience retention, members are even more likely this year than last to say they are able to increase audience loyalty so that patrons return multiple times. At the same time, they say that the percentage of visitors who are repeat attendees is similar to last year and the year prior.
- The Roundtable is revealing synergies and building trust by bringing members together, and out of those bonds have come opportunities to team up. They not only are more likely to say that relationships have become collaborative, but more of them are sharing resources with each other to build audiences.
- Most were able to comply with the attendance requirements for board members and executives. That's a good thing, because members report in large numbers that board

members and executives place a higher priority on audience building after going to Roundtable meetings.

- Even so, leaders are no more supportive of audience building this year than last. They are no more likely to speak about audience building than they were last year or to provide financial support to apply lessons from the Roundtable to their own organizations.
- Attendance requirements for members led to greater participation, although some suggested that fewer meetings might suffice, since now they are building on a base of existing knowledge. They are quick to add that in-person meetings are, however, a non-negotiable component of the Roundtable's effectiveness.
- Some found the regular reporting requirement challenging. What's more, in the smallest performing arts organizations with few programs, it may have felt too frequent. Nonetheless, most members agreed regular reporting helped them understand their organization's audience-building progress. Moreover, in interviews, members mentioned that having reporting requirements shared by all participating organizations increased their accountability and buy-in.

Roundtable members continue to find the forum's structure effective.

- Beyond any response on a survey, their high levels of continued participation provide evidence that members see value in the Roundtable. In addition, as they did last year, they say the expert presentations are the most useful of all the activities. But those lessons are particularly effective when combined with peer sharing that shows how concepts introduced by experts play out in practice, helping to spark members' own experiments. Participants also cite peer presentations and interactions as a source of ideas and encouragement for that experimentation.
- Members taking part in the in-depth interviews highlight, as they did last year, the meetings' environment as critical in creating the comfort and trust that encourages sharing and collaboration. It is a professional, egalitarian environment where members feel respected, and all voices are heard. Unprompted, some members praised the discussions for balancing the needs of all members equally. In a field where egos can quickly get in the way of progress, this is no small accomplishment. It is especially noteworthy that this climate has been maintained as attendance has broadened to include board members and chief executives, and that members come from a mix of large and small organizations that can easily have had difficulty finding the common ground needed to share experiences in building audiences.

Even with the changes in self-reported knowledge, attitudes, and behavior, broader organizational metrics did not shift.

- The percentage of revenue from earned income and the percentage of audience members who are repeat attendees have held flat. While growth could be occurring in a way these metrics do not capture, they are intended outcomes of some of the audience building frameworks presented to Roundtable members.
- A recently completed financial analysis showed mixed results, and did not find that audience growth accelerated after members began participating in the Roundtable.

CONCLUSIONS AND RECOMMENDATIONS

A sustained momentum has been established with solidified gains in knowledge, attitudes, and behavior. Positive movement in the second wave of the evaluation was slower than in the first, but it could not be expected to keep pace with the first year of rapid learning, and some metrics have a natural “ceiling.”

It is still too early to say if those gains will translate to bottom-line results.

- Even if the Roundtable (or any other audience-building initiative) were to create bottom-line impact, it would likely take a period of several years to see it.
 - Organizational change is usually slow, especially when it originates from the middle (e.g., from marketing staff as opposed to organization leaders).
 - While small wins can be attained on a shorter time horizon, it takes longer for truly transformational ideas to become accepted, then implemented, and then for the tactics and processes that result to be fine-tuned. For that reason (among others), audience growth typically requires years of sustained effort.
 - Because the Roundtable is a new model, it is difficult to say with certainty when this change should occur, or what the impact will be.
- But the intermediate indications are positive.
 - The theory of change posits that shifts in awareness, knowledge, peer networks, risk-taking and orientation toward audiences come first, and members report these are happening. The theory—and existing research on audience building—also suggest organizational outcomes take the longest time to achieve; it is probably too early to see movement in downstream metrics across a large group of members, and that movement is likely to only happen within a select group of them.
 - Philosophies about the importance of audience-building and what matters within that (e.g., balancing retention and acquisition) continue to evolve and move deeper into organizations, and these are critical intended intermediate outcomes.
 - Some members say that after a period of learning they are only now able to implement practices that reflect principles they have been exposed to in the Roundtable. Results from those efforts will require time to be realized (and it will certainly take time to fine tune the approaches).
 - While the field in Atlanta is also strengthening, the full benefits of more robust networks also usually take time to be fully realized.
 - Investment can be justified to the extent that (1) solidifying the already realized gains in attitudes, knowledge, behavior, and field-building are valued outcomes, and (2) it is recognized that discernible bottom-line impact could still be years away.

The results of this evaluation suggest several important considerations as the Roundtable potentially transitions to a new management structure later this year.

- Critical ingredients to maintain include the egalitarian, professional environment of meetings, and the mix of expert-led workshops and peer sharing. These have served members well.
 - Furthermore, with the groundwork on audience-building laid, it may be possible to decrease meeting frequency and still maintain the momentum. The reduced meeting cadence for the first half of 2019 provides an opportunity to identify the ramifications of such a move, and it may be worth getting a read from members in the second half of the year—even if it is an informal gathering of the Steering

Committee—to identify the impact. Key questions to examine are a continued sense of collaboration, and if bi-monthly meetings are enough to keep audience-building at the forefront of participants’ minds and organizational activities.

- Leaders do not yet appear to be rallying around audience building. That is likely a field-wide issue, but is a necessary intermediate outcome for longer-term change. Executives’ continued attendance at Roundtable meetings can be a step in the right direction. It may also make sense to think about other convenings that could bring them together to discuss how audience-building can help their organizations fulfill their artistic missions, or identify their resistance to “putting the audience at the center of it all.”
- Members find the current structure of the Roundtable effective. They continue to cite the atmosphere as important. If facilitation does transfer, the urge to make changes right away should be resisted to help members feel that their needs are understood.
- Members appreciate that data and audience retention concepts and practices are being reinforced both in expert-led workshops and peer presentations. They are getting smarter about how to use their own transactional data to bring audiences back, and would welcome continued learning here. Design thinking and other empathy-driven frameworks have also become a part of their vocabulary and toolbox, and heightened their attention to what audiences are looking for. Members continue to find reinforcement of those underlying concepts and models useful as well.
- That said, there is room for new content to be introduced. Although most members say they know who their target audience is, fewer agree strongly that they understand what those individuals want. This discrepancy could be a growth area, especially because nearly half say they are in the “seek” stage of audience building, where critical objectives include understanding the needs and perspectives of potential audience members.
 - If and as the Roundtable looks to build member knowledge further, more outward-looking content areas, such as audience research into visitor needs and preferences, Atlanta demographics, and audience diversification, are worth considering.

EVALUATION PURPOSE & EVALUATION QUESTIONS

This evaluation examines the impact of the Audience Building Roundtable on Atlanta arts organizations' audience-building practices. It builds on an evaluation completed in February 2018 that included an assessment of the Roundtable's impact in its first 20 months (May 2016–December 2017) and a theory of how participation in the Roundtable produces change. That first evaluation found improvements in participants' self-reported audience-building knowledge, attitudes, and practices, in line with the theory of change. There was little evidence, however, of broader organizational impact, which the theory of change posited as a longer-term outcome. This second evaluation wave examines where member organizations' audience-building practices and competencies currently stand.

THE AUDIENCE BUILDING ROUNDTABLE

In May 2016, the Arthur M. Blank Family Foundation launched the Audience Building Roundtable to spark Atlanta arts organizations' innovation and risk-taking in audience building. The ultimate goal: To help these groups better listen and respond to the wants and needs of current and potential audiences and, as a result, grow attendance and improve the organizations' financial stability. To that end, every month, upwards of 100 arts managers from approximately 50 Atlanta arts groups meet to hear about strategies for audience retention and growth from experts, consultants, and each other. In addition, two cohorts of five organizations each have participated in an analysis of three years of patron data from audience consultants TRG. Roundtable participants have also received grants to support their own audience-building programs. The results of their initiatives are shared with the broader membership, creating a dynamic learning community.

Roundtable membership is by invitation only, based originally on research into active arts groups in the Atlanta Metro area. There are currently 49 member organizations, compared to a high of 55 at the beginning of last year (it was 51 in early 2017). Three-quarters of the member organizations are in the performing arts and the remainder in visual arts. The organizations include a wide range of sizes, with about one-third having budgets ranging from \$10,000 to \$500,000, another third having budgets of between \$500,000 and \$1.5 million, and the remaining third with budgets over \$1.5 million.

ROUNDTABLE COMPONENTS AND THE THEORY OF CHANGE

The Roundtable is an integrated program with several components, designed to produce change. Figure 1 at the end of this section contains a thumbnail sketch of those components and the outputs and outcomes they are believed to produce in a theory of change. The individual components are described below.

Meetings. The Roundtable meets monthly in different locations across Atlanta. Meetings generally include the following components:

- Networking. The meetings begin with the opportunity for informal networking during a continental coffee and breakfast.
- Technical Assistance Workshops. Some meetings take place around workshops led by external consultants that include a mix of presentation, group exercises, and discussion. The

workshops often extend beyond one session, providing continuity, reinforcement, and depth in themes that have included using data to build patron loyalty, applying design thinking to help understand the audience experience, social media strategy, and fostering innovation.

- Member presentations. Some meetings include presentations from Roundtable members reporting on their own audience-building initiatives and results. The material for these presentations almost always has come from work funded through grants by the Blank Family Foundation (described below in “Direct Support”). Members have also prepared presentations of what they learned at marketing conferences they attended through scholarships funded by the Blank Family Foundation.
- Peer discussions. Following expert and peer presentations, members gather at tables with others from similar-sized groups to discuss implications of the day’s proceedings for their organizations. A member of the Steering Committee (see “Administration” below) sits at the table and keeps the conversation focused on audience building.

DIRECT SUPPORT

The Blank Family Foundation provides direct support to Roundtable member organizations:

- Technical assistance to individual organizations. Several organizations applied for and received marketing and audience-building technical assistance intended to complement the strategies and tactics presented in Roundtable workshops. In 2018, this assistance included consulting to smaller arts groups from arts consultant Sara Leonard, database patron analysis from consultant Target Resource Group, and media placement from Red Clay PR.
- Audience-building grants. The Foundation supported two audience-building grant programs in 2018. Both programs required budget matching from new revenue sources (not to include in-kind, reserves, or annual operating budget dollars).
 - “Essential Journey of Audience Building” 1:1 matching grants for projects with direct costs of \$5,000–\$50,000.
 - “Audience Building Innovation” 2:1 matching grants for projects with direct costs of \$45,000–\$150,000.
- Marketing conference scholarships. In 2018, organizations were able to apply for funding for a representative of their organization to attend the National Arts Marketing Project Conference in Seattle.

ADMINISTRATION

Management and facilitation. The initiative is managed by Terri Theisen of Atlanta-based Theisen Consulting. Theisen worked with the Foundation in designing the Roundtable, and since its first meeting has been responsible for managing the initiative and developing its budget and curriculum, in consultation with and for approval by senior Foundation staff. Theisen also facilitates each Roundtable and Steering Committee meeting, and maintains communication with members as a regular presence both during and outside of Roundtable meetings. She acts as a liaison between the Roundtable and the Foundation both informally and through regular reporting to the Foundation on Roundtable activities, and by developing and administering communications about grantmaking and other Roundtable processes. In addition, Theisen Consulting staff maintains a central Roundtable website.

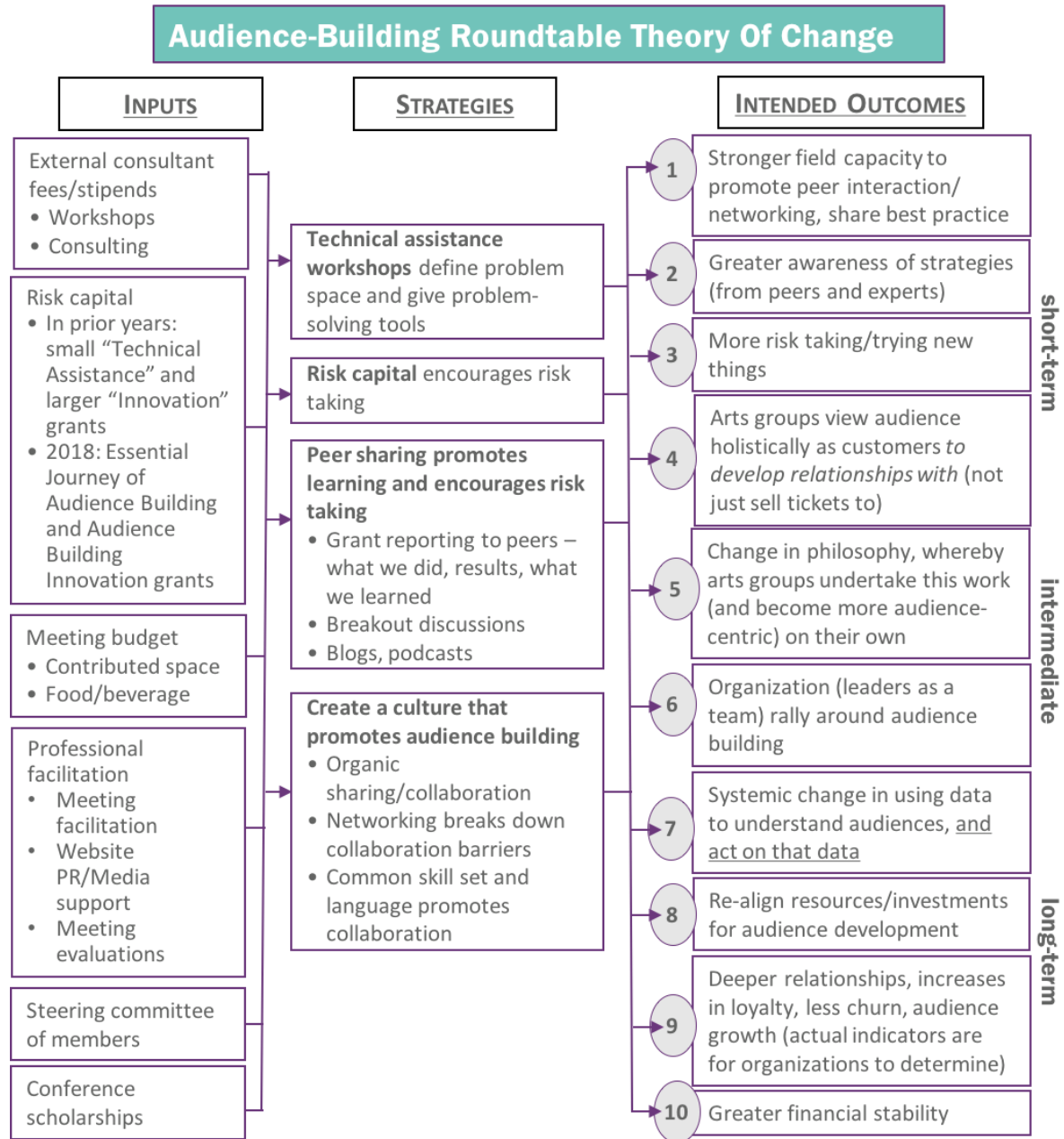
Steering Committee. A Steering Committee made up of 10–12 individuals from Roundtable organizations of different budget sizes and art forms has advised Roundtable management on member needs and interests in three important ways:

- (1) In an annual planning session, the committee reviews workshop evaluations and provides input on curriculum and meeting agendas for the coming year.
- (2) In conference calls on an as-needed basis, it provides feedback to Roundtable management.
- (3) Individuals on the committee field concerns from other members and communicate these to Roundtable management, and at times have delivered messages to their colleagues in workshops, as needed.

The Steering Committee also supports Roundtable administration by reviewing grant applications for scholarship awards to attend marketing conferences. At some Roundtable meetings, Steering Committee members have led breakout discussions and assisted with door registration.

Website. A website (<http://www.audiencebuildingroundtable.org/>) is maintained for the Roundtable that includes meeting logistics, forms, and program descriptions, as well as the technical assistance and peer presentations delivered at Roundtable meetings. It also contains a newsletter and blog with contributions from members, marketing consultants, and audience-building experts.

Figure 1. Theory of Change



RESEARCH DESIGN AND METHODS

DOCUMENT REVIEW

The evaluation included a review of meeting agendas and presentations, meeting evaluations, planning documents, and a financial analysis of member data completed by Rebecca Thomas & Associates in October 2018.

MEMBER INTERVIEWS

In-depth interviews. Half-hour semi-structured interviews were conducted by telephone in January 2019 with 10 organizations selected to include a representation of performing and visual or mixed arts organizations across three different budget sizes:

- 4 small organizations (less than \$250K budget): 3 performing, 1 visual or mixed
- 4 midsize organizations (\$250-\$1MM budget): 3 performing, 1 visual or mixed
- 2 large performing arts organizations (over \$1MM budget)

If more than one person from an organization regularly participated in Roundtable meetings, up to two people from that organization were interviewed together (4 of the 10 interviews were completed with these dyads). Interviews completed with those same organizations one year earlier were used as a starting point, and the conversations focused on the experience of the Roundtable this year, including the impact and experience of continued participation against the backdrop of each organization's audience-building goals and context.

Member survey. Roundtable participants from 47 of the 48 member organizations completed this 15-minute online survey in January and February 2019. To allow tracking, most questions were identical to the first evaluation wave (2018), covering: Roundtable participation levels, satisfaction with the Roundtable, self-reported knowledge of audience-building strategies, organizational audience-building practices, audience outcomes, and perceptions of the Atlanta arts community. New questions were added to assess impact of the attendance and reporting requirements. Comparisons are made throughout to the 2018 evaluation data. In addition, a shorter member survey was completed by 45 of 50 members in January 2017, and where appropriate, comparisons are made to those results as well.

RESEARCH DESIGN LIMITATIONS

Single-site evaluation. This research is a single-site evaluation using an explanatory case-study design. Because there is no control group, it is not possible to show cause and effect between intervention and outcomes. Maturation, on-the-job development, trends in the field, or other factors are potential validity threats and no amount of sophisticated measurement and analysis can compensate for them. Quantitative survey methods were used to support qualitative observations, but this remains a qualitative, non-experimental research design. That said, single-site studies such as this one can be not only descriptive, but also informative about pathways to impact. In the absence of experimental proof, they can provide strong and credible evidence about whether and how programs contribute to learning and other outcomes, particularly when guided by theory. (For more on this approach, see Robert K. Yin in *Case Study Research: Design and Methods*, 3rd Edition, New York: Sage Publications, 2003.)

METHODOLOGICAL NOTES

Retrospective pretests. One objective of this research is to examine change in members' knowledge, attitudes, and behavior. In examining these outcomes, the research reports the results of "retrospective pretests," which ask respondents to rate both current and previous, pre-program knowledge, attitudes, and behavior. These tests are widely used in evaluation research, and were used in the present research because pretests from the start of the program were not available. There is considerable debate about the accuracy of these tests vs. true pretests—those taken at a program's start. This report is not the place to debate the merits or demerits of any one methodology (the literature is not conclusive and there are arguments on both sides). But these measures can provide insights into general trends, and we advise the reader to focus first on the current-state measurement—in which respondents report where they are today (e.g., current knowledge)—and then look at the general directional trend in comparison to retrospective pretests (e.g., current assessments of prior knowledge) to see how far participants say they have come. In this report, assessments marked "Pre-Roundtable" were made retrospectively—they were not in fact taken before the Roundtable.

Survey length can weaken response quality and participation, so as questions were added, some were removed. Two of the four retrospective pretest question series referring to *behavior frequency* were seen as superfluous to collect, and were therefore removed, so the "Pre-Roundtable" comparisons used in those questions are taken from the 2018 survey completed last year. The justification is as follows: Retrospective pretests are seen as most valuable for assessing knowledge and attitude change where an intervention (such as the Roundtable) might cause a shift in frame of reference. For example, as Roundtable members' competence grows, they may judge themselves more harshly (they now know what they did not know), so a self-report of audience-building knowledge taken in the present would be more critical than one taken before the intervention occurred, concealing real growth. That should not be true, however, for reports of behavior frequency where response options are more concrete (e.g., performing a specific behavior once per month, once per week, etc.) and, therefore, less open to interpretation and less susceptible to frame of reference shifts.

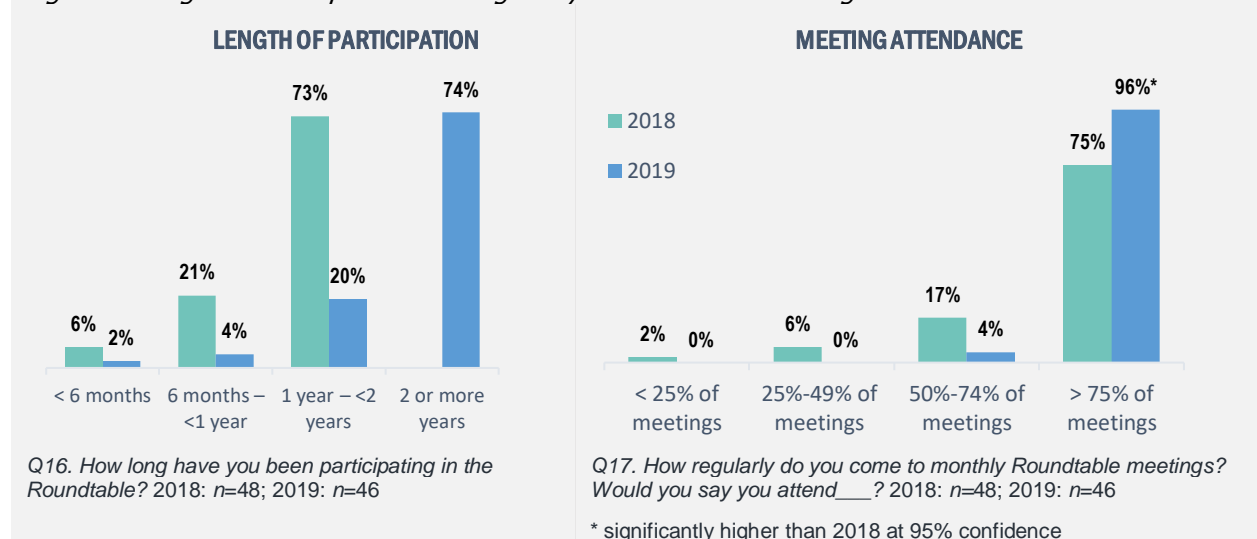
Significance testing across waves. The first wave of survey evaluation data is marked "2018", and the second "2019", referring to the years in which survey responses were collected. Some respondents identified their organizations in the survey, allowing for matching between the two waves for those respondents. That kind of matching can increase the power to detect differences, which is important in small samples. But not all respondents chose to identify their organizations, so in statistical parlance, the samples could only be partially matched—the two datasets are neither fully independent nor dependent. Tests of significance across the two evaluation waves were conducted using Stouffer's weighted z -test, which combines the results of separate comparisons of the matched and unmatched samples to the prior year's data. That test was chosen because it has been examined most extensively in the somewhat scant literature on combining the results of matched and unmatched samples, and has been shown to provide statistical power with robust control against Type-1 errors (false positives).

FINDINGS

ENGAGEMENT

Meeting attendance continues to be high and consistent, with a minimum of 102 attendees at each meeting in 2018, up from an average of 85 attendees in 2016 and 87 attendees in 2017. As shown in Figure 2, most survey respondents indicated that they had been attending for over two years, and nearly all (96%) regularly attend at least 3 out of 4 monthly meetings, a sharp increase from last year when only 75% made that claim. These attendance increases are not surprising given new requirements that member organizations send representatives to each meeting (16 out of 48 respondents successfully completed the requirement in 2018).

Figure 2. Length of Participation and Regularity of Roundtable Meeting Attendance



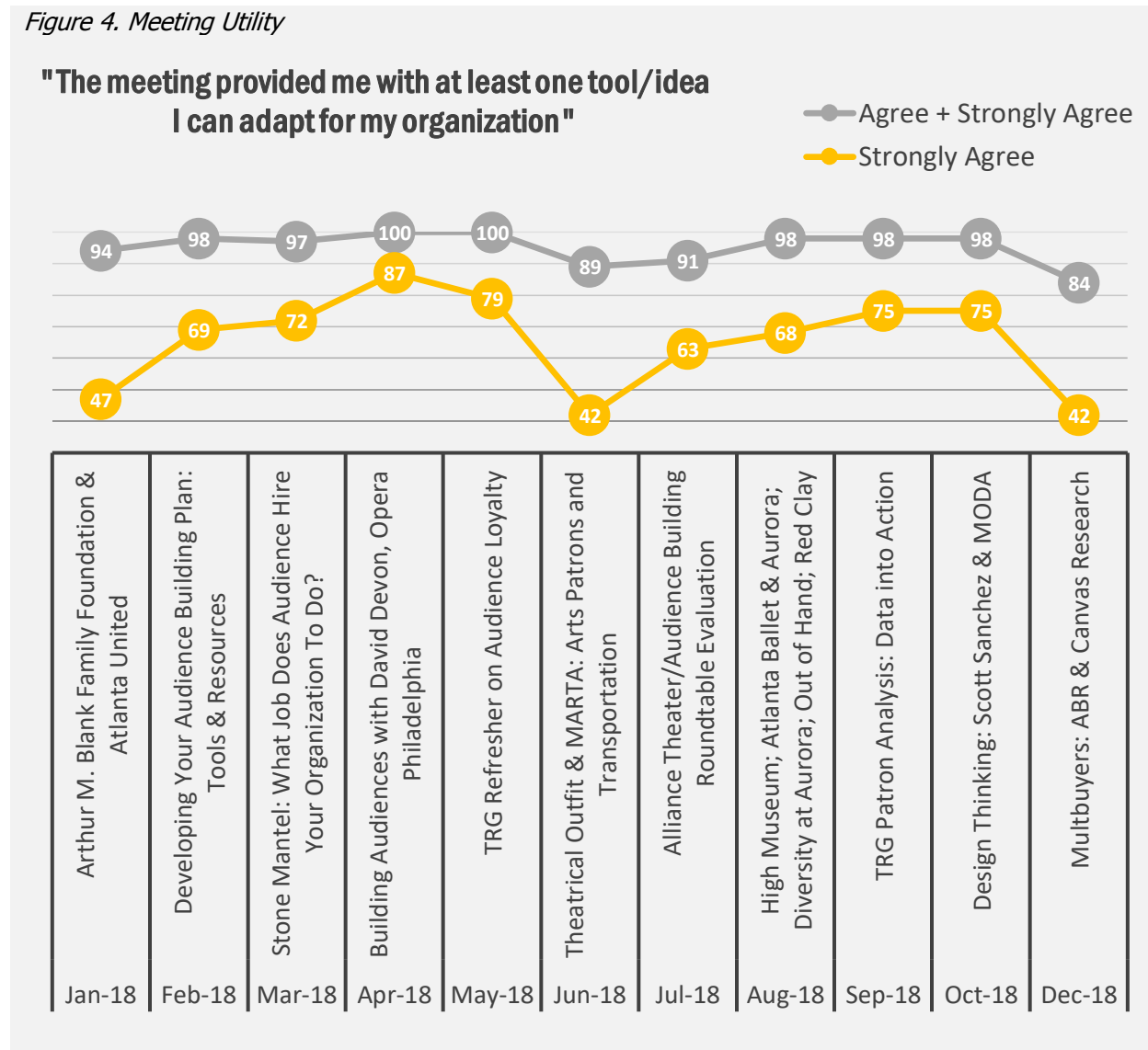
Most members (81%) go to the meetings with someone else from their organization, an increase since last year (56%; Figure 3, left) and again, likely a reflection of new attendance requirements. But their reasons for attending are more than just compliance: members say their Roundtable participation is time well spent. Most (98%) agree with the statement “My participation in the Roundtable has been worth the time I have spent,” and 77% strongly agree.

Figure 3. Roundtable Attendance per Organization and Overall Participation Satisfaction



In evaluation surveys completed after each meeting, attendees rated how much they agreed that the session provided at least one idea, solution, tool, or strategy (phrased differently across the eleven surveys) they could adapt to support their own audience-building work. Figure 4 shows ratings of “agree strongly” and net agreement (“agree strongly” plus “agree”). Because phrasing varied slightly across the 11 surveys the results are not directly comparable, but taken together, the pattern suggests that the meetings members found most useful contained presentations from outside experts.

Figure 4. Meeting Utility



Members come to learn. Arts managers see the Roundtable as professional development. Figure 5 illustrates member rankings of four reasons for participating in the Roundtable, including learning from experts, learning from peers, building relationships with other arts organizations, and funding opportunities. The rankings are virtually unchanged since last year, with members saying the most important reason is to learn from experts (69%) or strategies of their peers (23%), and these two learning items capture most of the second-place rankings as well.

It's given me skills to use now and beyond my current role...it's real professional development.
Staff Member, Small Organization

Figure 5. Member Motivations for Roundtable Participation



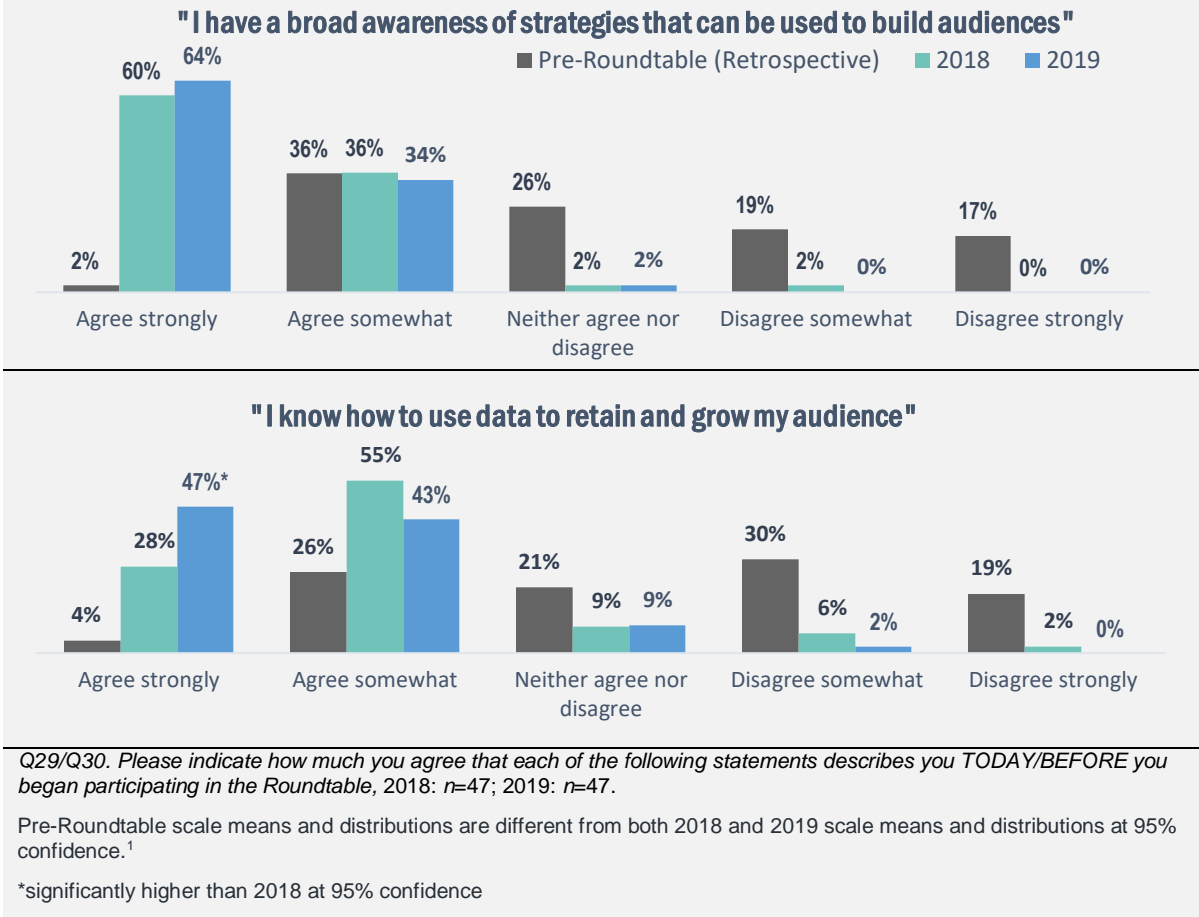
Q 19. Below are several reasons you might participate in the Roundtable. Please rank them in order of importance to you from 1 (most important) to 4 (least important). 2018: n=48; 2019: n=48

As it did last year, building relationships with other organizations was ranked next highest in importance on average, followed by funding opportunities. That does not mean funding is not important; the rankings are relative. More than just “nice to have,” members said last year that even in small amounts the funding provides risk capital to help them try out what they are learning, the results of which they share back with other members.

KNOWLEDGE

Roundtable members’ knowledge—at least self-reported—continues to grow. Most (98%) agree they have a broad awareness of audience-building strategies (Figure 6), and 64% agree strongly. That number has not risen since last year, but like last year, more members agree that this statement describes them now than before they began participating in the Roundtable (a “retrospective pretest”, also in Figure 6). They are more likely this year (47%) than last (28%) to strongly agree that they know how to use data to retain and grow their audience. Note that when Roundtable members talked about “data” in qualitative interviews, they were referring specifically to their own box office and internal data—not census data, survey data, or other audience data. That may reflect the emphasis on patron data in the Roundtable (e.g., in work with TRG). Whatever the reason, the results for this question should be interpreted using that definition of “data”.

Figure 6. Perceived Knowledge



For many, the groundwork of audience-building knowledge has been established, and their continued participation provides reinforcement that they find valuable. Their learning is deepening.

The concepts are now there, and it's helpful that we go back to certain concepts as opposed to latching on to any and all trends. That's been helpful. We invite TRG back, we invite Stone Mantel back to expand on things, as opposed to trying to balance them all when we've only scratched the surface.
Board Member, Small Organization

Some say they are now moving from theory to practice.

The new knowledge was really in the first couple of years. And so now we're practicing what we've learned.
Executive Director, Large Organization

¹ Throughout the Findings section, differences between the 2018 and 2019 data, and the retrospective pre-tests, are gauged by comparing the overall scale means using paired t-tests, and the overall distributions using Wilcoxon signed rank tests. Differences between 2018 and 2019 are tested using Stouffer's weighted α -test.

Now we're able to dive down and get a better grasp of what it really means.
Staff Member, Large Organization

They believe though, that there is always more to reinforce and new things to learn.

Audience building is never going to end. There's not going to be a magic solution ever. Things are going to change. Trends are going to come and go.
Executive Director, Midsize Organization

The way you market is changing so rapidly with social and digital marketing and all of these new tools that are impactful in our world. You have to keep on top of it, and the work we have been doing in the Roundtable has helped me hone those skills.
Marketing Director, Large Organization

With continued reinforcement, members are thinking more often and more extensively about audience development.

Over the course of three years we've reframed how we think about audience building. We have started, for instance, focusing on the people that have come to our organization once or came maybe once a few years ago and it's lapsed. And we're trying to draw them back.
Executive Director, Midsize Organization

Audience building now enters into everything I do. It's become second nature. It enters all conversations I have, presentations that I do. In the beginning, I thought it was just about butts in seats, but now I see it as ensuring the longer-term health of our organization.
Executive Director, Small Organization

Roundtable members also report a high degree of optimism in their ability to increase their organization's audience (Figure 7), and it is unlikely that will move any higher (the increase from 2018 to 2019 approaches statistical significance, surpassing 90% confidence but not reaching 95%).

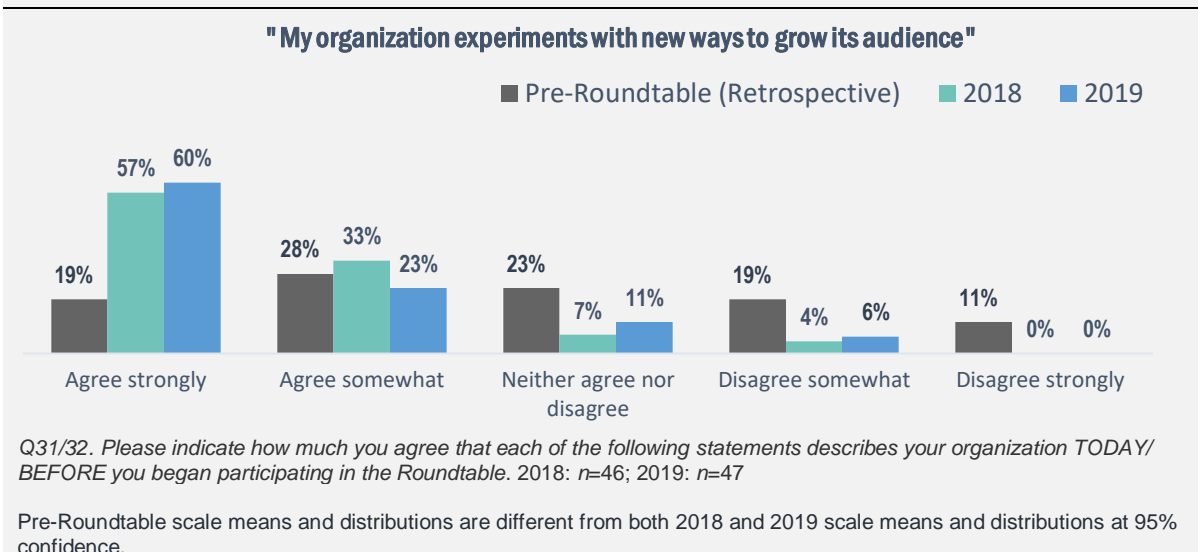
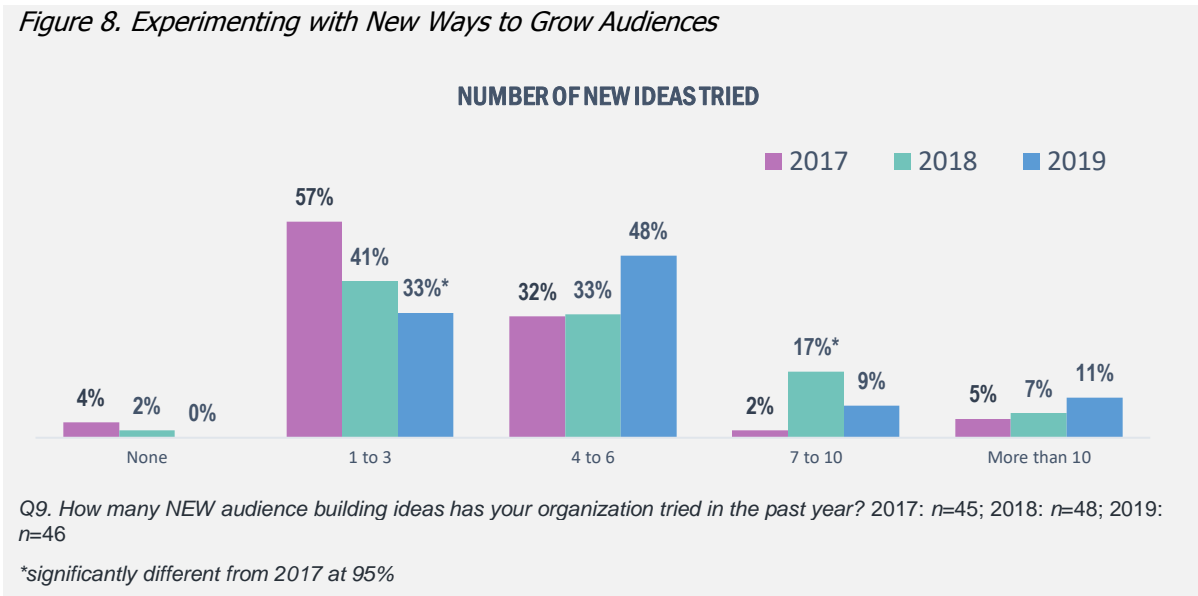
Figure 7. Optimism



BEHAVIOR

Roundtable members also report behavior change. They say they are trying more new ideas this year than in last year's survey, continuing a trend from 2017 (Figure 8, top). About one-third (33%) say they tried three or fewer ideas in 2018, compared to 43% who said so last year and 61% during the first year of the Roundtable—a significant drop since the first year. Last year, members reported their organizations were experimenting with new ways to grow audiences more now than before they began in the Roundtable. That number has remained at a high level but is no higher than last year (Figure 8, bottom).

Figure 8. Experimenting with New Ways to Grow Audiences

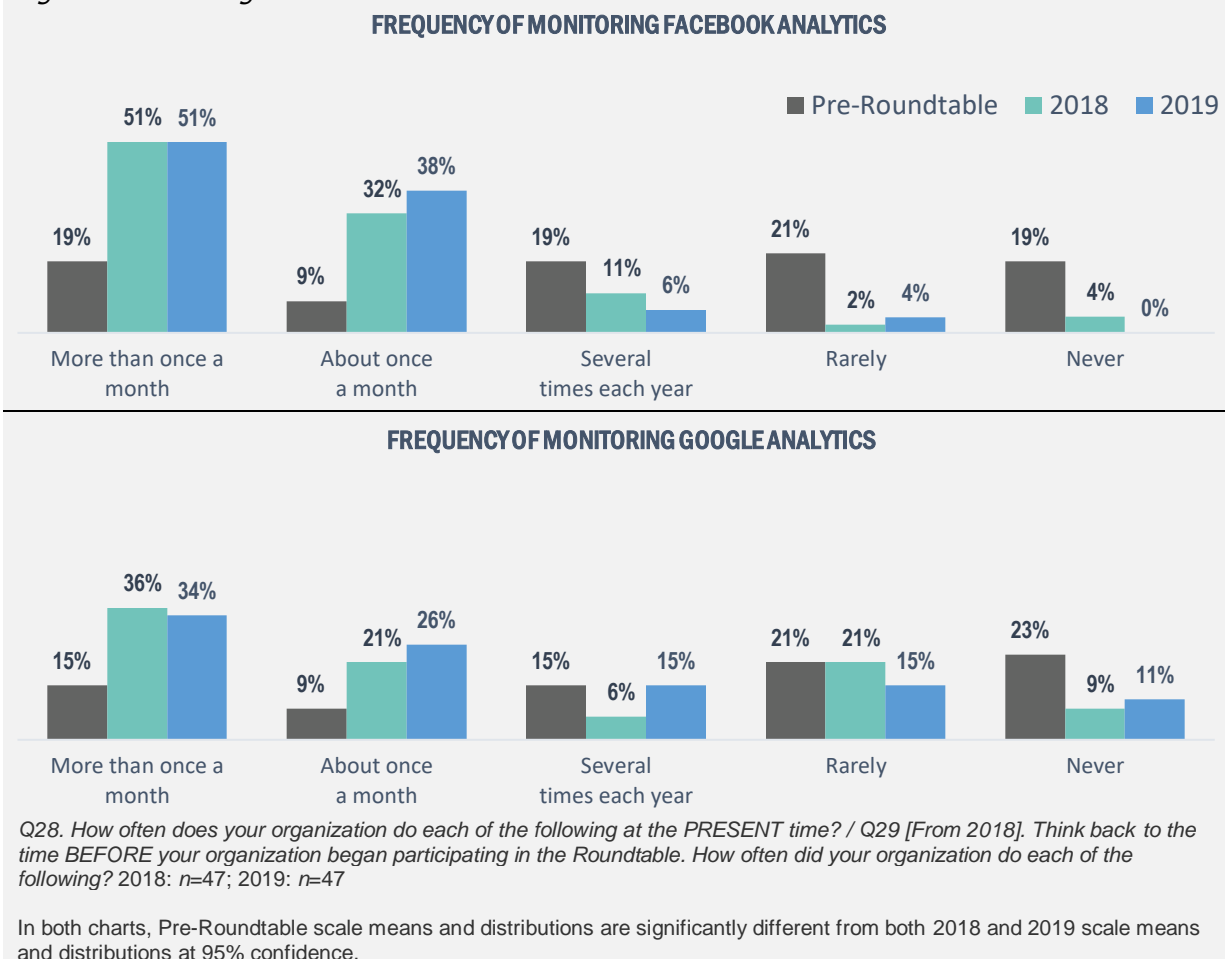


That's where the biggest impact is. We're sending all sorts of things out, as opposed to just sending one thing out and seeing how it works.

Staff Member, Large Organization

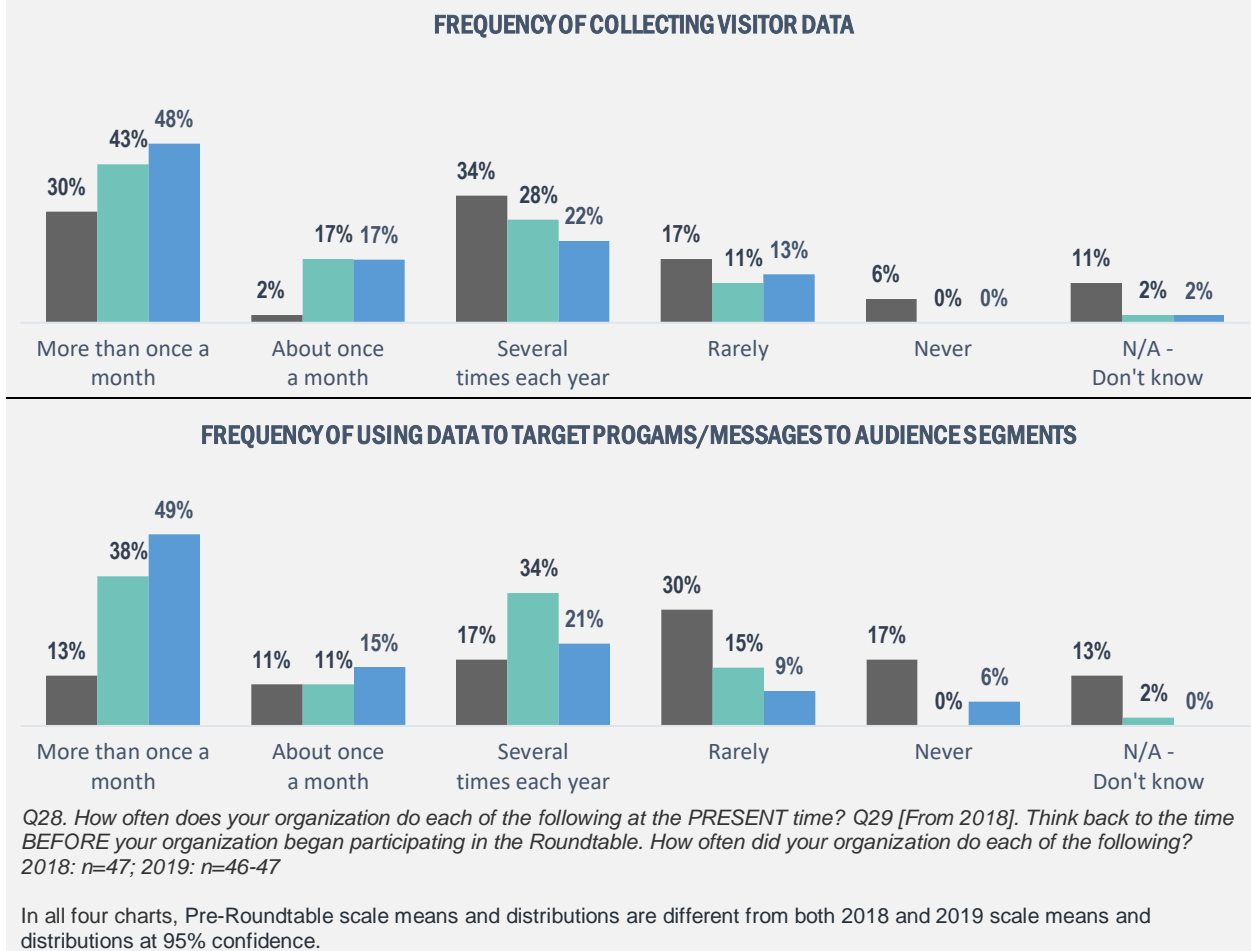
After the first year of the Roundtable, members said they monitored social media analytics more than before their Roundtable participation started. Whereas fewer than one-third had checked Facebook analytics at least once per month, that number rose to over 80% last year (51% plus 32%) and has maintained that level this year (Figure 9). Sixty percent say they monitor Google analytics about once a month or more, over twice the number of members that say they did so before the Roundtable began (24%), but virtually unchanged since last year (57%). These numbers may have reached a natural ceiling—few organizations will find it necessary or informative to monitor social analytics more than once a month, with movement typically only expected in response to announcements, new campaigns, or other online activity.

Figure 9. Monitoring Social Media



Nearly two-thirds (65%) say they collect visitor data at least once a month, compared to about one-third (32%) who said they did so before taking part in the Roundtable, but on par with levels seen last year. The number of those using data for targeting is trending higher, with 64% saying they do so at least once per month. The increase in the number who say they do so more than once per month (from 38% to 49%) approaches statistical significance (it surpasses 90% confidence, but does not reach 95% confidence), and is higher than the number who said they did so pre-Roundtable.

Figure 10. Collecting and Using Data



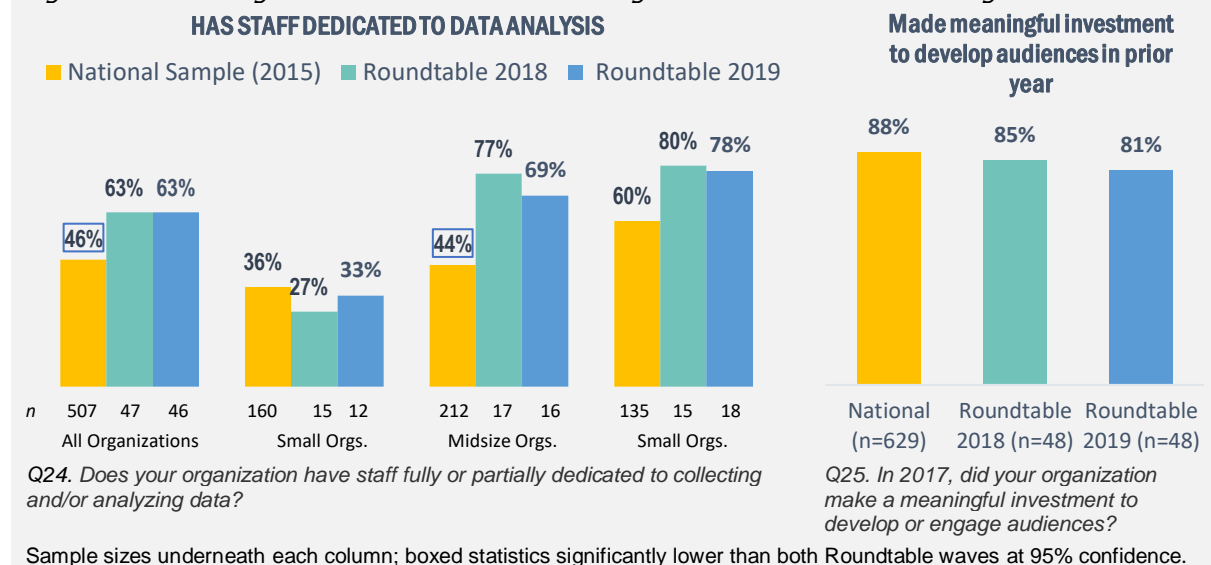
Creating targeted offers for particular market segments has become commonplace, when it was not before.

We're being more deliberate about prioritizing and reaching out to people that have already come to us. We did a performance at Christmastime with another group, who we've worked with about six times in our past. So, we went back to those who had attended those concerts and said, "That group you enjoyed is back. We've missed you, come back."

Executive Director, Midsize Organization

Staff structures reflect a more data-driven focus as well. Compared to a national sample of arts managers surveyed by the Nonprofit Finance Fund in 2015², Roundtable members (63%) are more likely than arts managers nationwide (46%) to say they have staff whose responsibilities include collecting or analyzing data, although they are no more likely than they were last year when an equal number said this was true. The contrast between Roundtable members and the national sample is greatest in the midsize organizations, suggesting that, at least in this instance, the Roundtable is more impactful for organizations of that size (note that Roundtable sample sizes broken down by organization size become small and provide a general indication only).

Figure 11. Marketing Investments of Roundtable Organizations vs. Nationwide Organizations

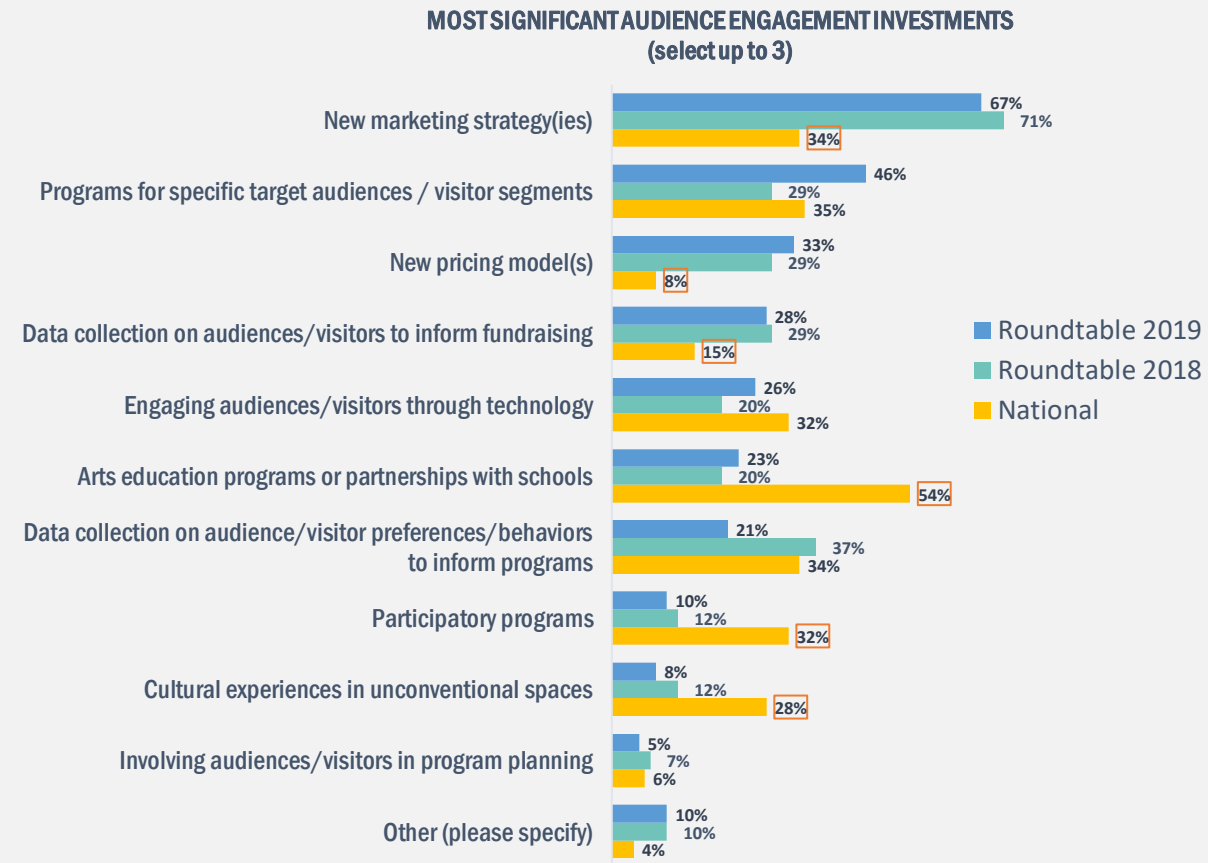


Roundtable members are equally as likely (81%, compared to 88% nationally) to say they made a significant investment in the prior year to develop or engage audiences, but they are directing investments differently than arts managers nationwide. Both the national and Roundtable samples were asked to state their top three investments, and the responses in Figure 12 reveal Roundtable members' prioritization of marketing and data-driven initiatives. By a ratio of nearly two to one (67% to 34%), Roundtable members are more likely to say the investment involved new marketing strategies. They are also four times as likely (33% to 8%) to indicate new pricing models, and nearly twice as likely (28% to 15%) to indicate data collection to inform fundraising. Conversely, over half of arts managers nationwide (54%) said that audience-engagement investments were directed to arts education or school partnerships, compared to just 23% of Roundtable members. The national

²The national sample comes from the Nonprofit Finance Fund's 2015 State of the Nonprofit Sector survey, available at survey.nonprofitfinancefund.org. The data included herein is a subsample from the Arts Subsector, filtered on the following organization types to match the Roundtable membership as closely as possible: dance, multi-disciplinary, museum, music-non-orchestra, opera, performing arts presenter, symphony orchestra, theatre, visual art/craft-non-museum. The budget sizes in the two samples could not be exactly aligned given differences in the survey instruments, and are as follows for the Roundtable: small (under \$300K), midsize (\$300K–\$1.5MM), and large (\$1.5MM). For the national sample: small (under \$250K), midsize (\$250K–\$2MM), and large (\$2MM+).

sample was also more likely than Roundtable members to indicate that their investments were directed to cultural experiences in unconventional spaces (28% to 8%) or participatory programs (32% to 10%). These patterns are largely consistent with the 2018 survey results.

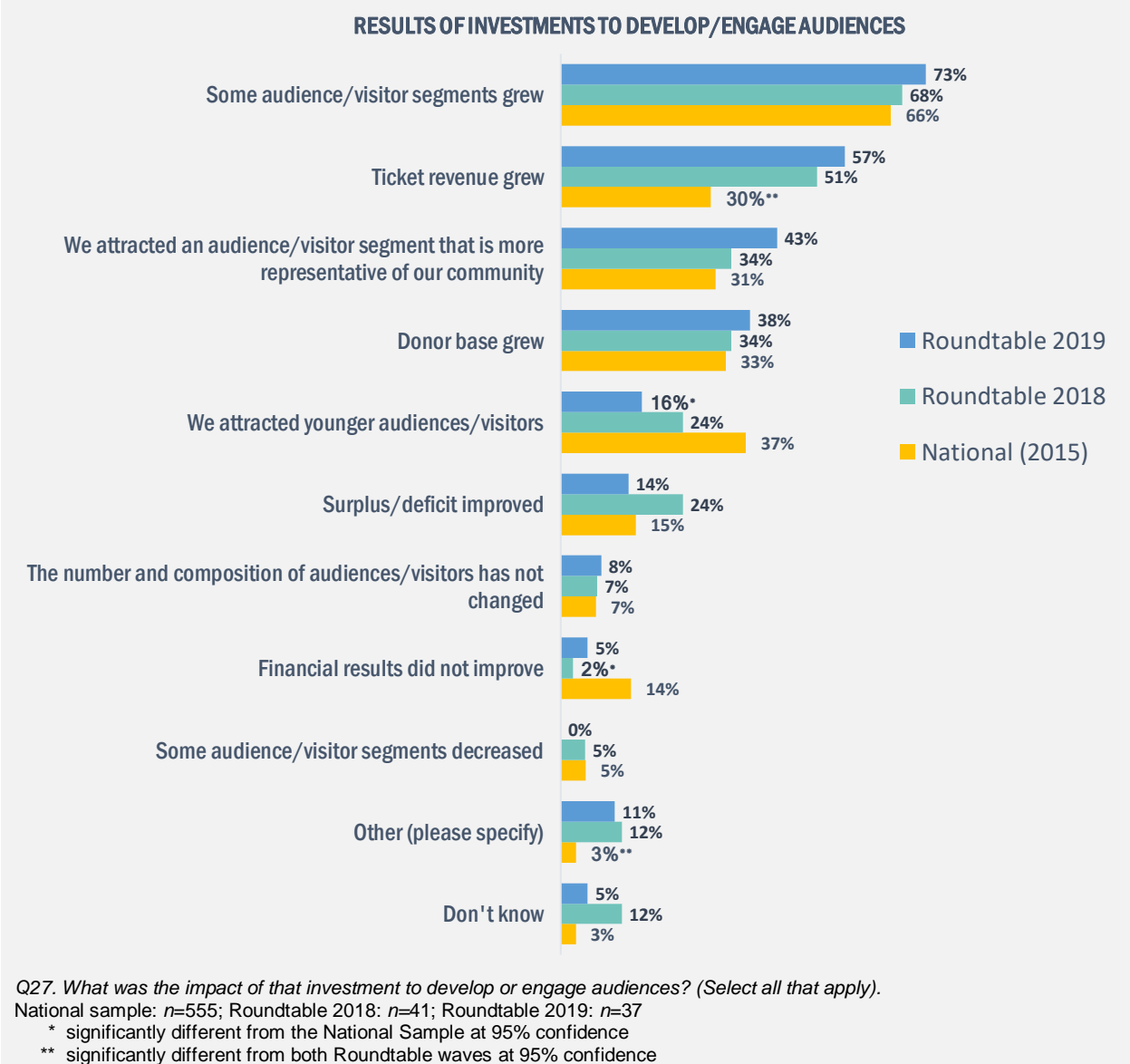
Figure 12. Audience-Engagement Investments: Roundtable vs. Arts Managers Nationwide



Q26. On the previous page, you said your organization made a meaningful investment to develop or engage audiences in 2017. Where was that investment targeted? (Select the most significant investments, up to 3.); Base=those who said they had made meaningful investments (see Figure 11). National sample, n=555; Roundtable 2018: n=41; Roundtable 2019, n=39. Boxed statistics are significantly different from both Roundtable waves at 95% confidence.

While both the National and Roundtable samples reported that some segments of the audience grew in large numbers as a result of their new audience investments, the Roundtable sample was nearly twice as likely (57% to 30%) than the National sample to report growth in ticket revenue. On the other hand, arts managers in the national sample were much more likely to say they attracted younger visitors (perhaps a result of their greater emphasis on education and school programs reported earlier). These trends are consistent with last year.

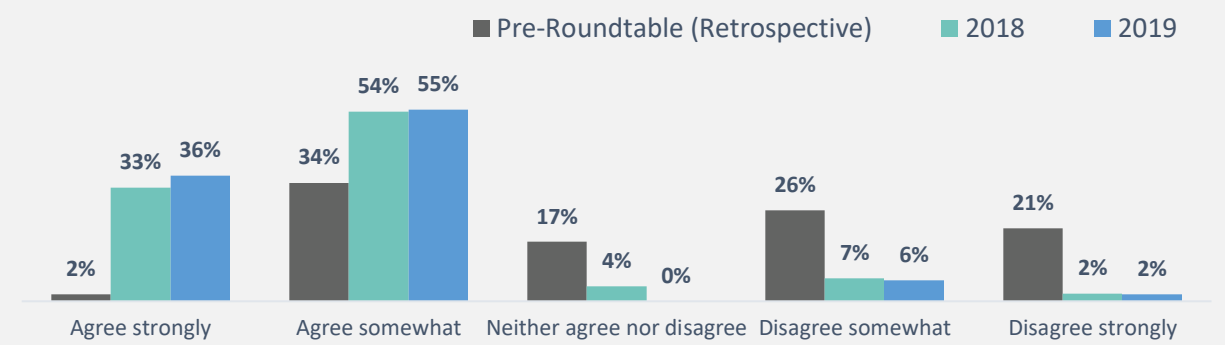
Figure 13. Return on Audience-Engagement Investments: Roundtable vs. Arts Managers Nationwide



In levels similar to last year, Roundtable members agree in large numbers that their organizations make an effort to ensure data hygiene (Figure 14, top half), and that this was not the case before they began participating in the Roundtable. Even so, there remains room to grow, because movement in the percentage of records with full contact information appears to have stalled (bottom half Figure 14).

Figure 14. Data Hygiene

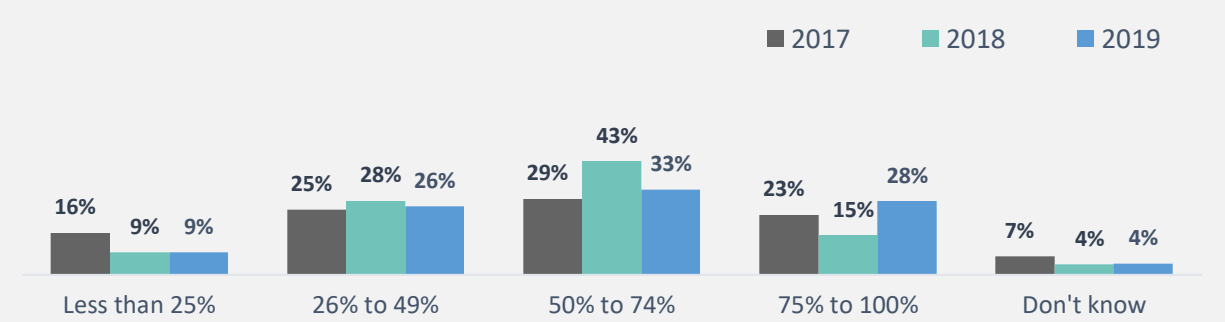
"My organization ensures audience data is as accurate and complete as possible"



Q31/32. Please indicate how much you agree that each of the following statements describes your organization TODAY/ BEFORE you began participating in the Roundtable. 2018: n=46; 2019, n=47.

The Pre-Roundtable scale means and distributions are different from both 2018 and 2019 scale means and distributions at 95% confidence.

% OF DATABASE WITH CONTACT INFORMATION

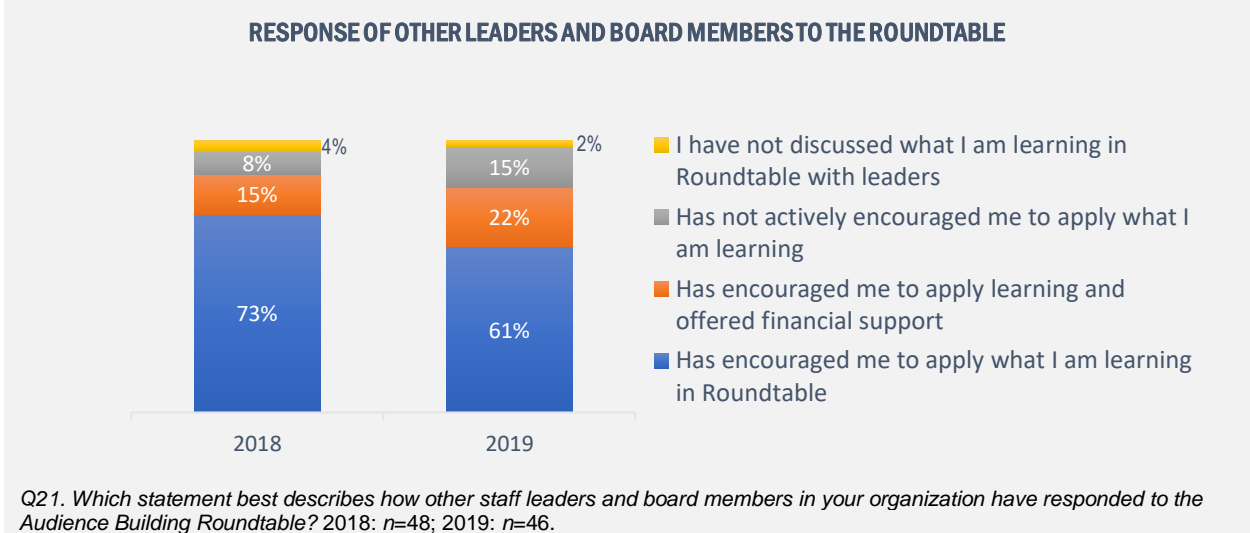


Q10. How many names in your database have an email address, postal address and phone number? (Attendees, ticket buyers, visitors, donors, participants.) 2017: n=45; 2018: n=46; 2019: n=46

ORGANIZATIONAL IMPACT

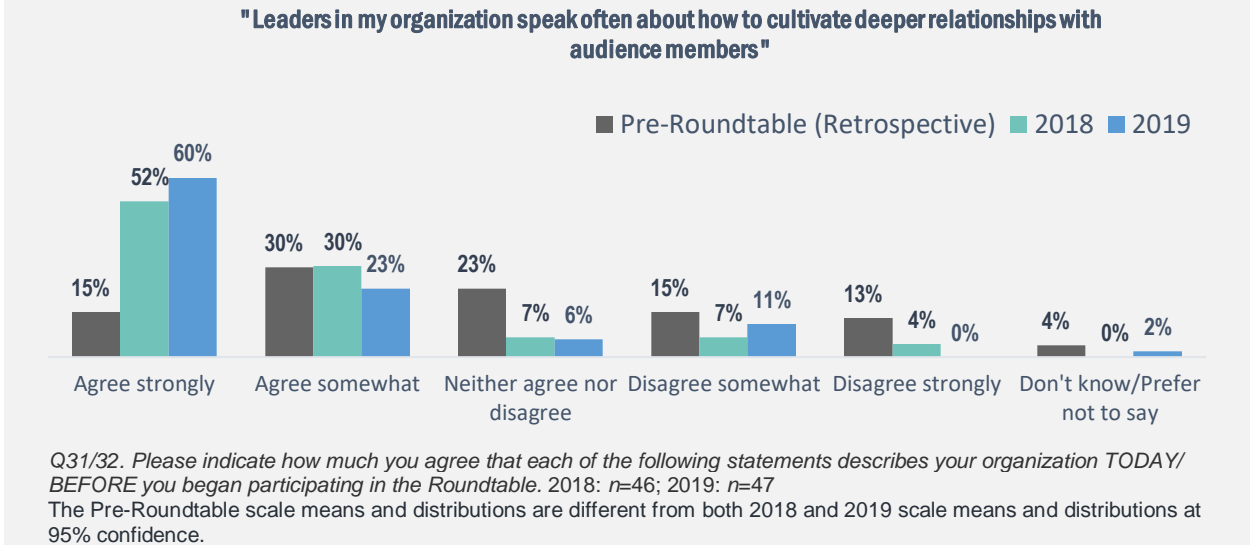
While the leaders and board members of members’ organizations have generally been supportive of the Roundtable, just one in five members (22%, Figure 15) say they have received financial support to apply what they are learning, on par with last year. An additional three in five (61%) say leaders encourage them to apply what they are learning. Few (15%) say leaders have not actively encouraged them to apply what they are learning.

Figure 15. Leadership Response to the Roundtable



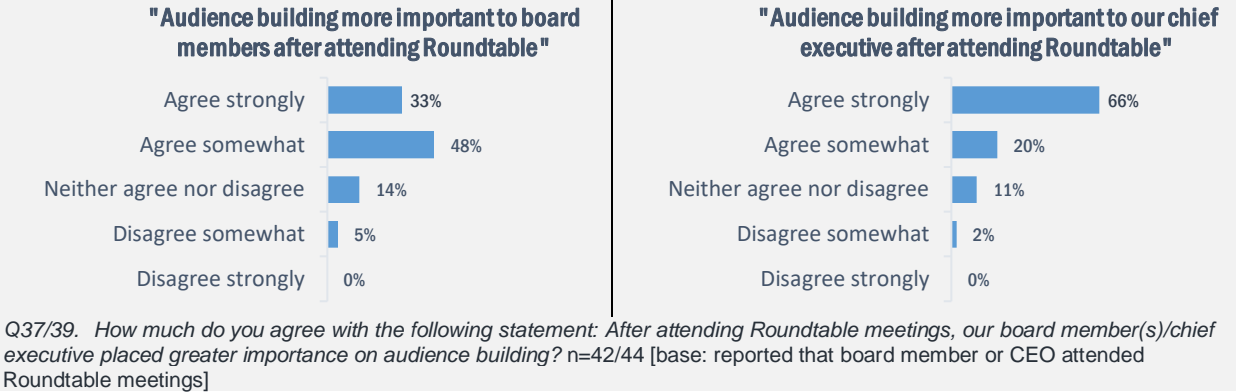
In addition, they say that leadership speaks about how to build deeper relationships today more than when they began participating in the Roundtable (Figure 16), but that number has not moved appreciably since last year.

Figure 16. Leaders Speak Often About Audience-Building



New in 2018, participating organizations were required to send their CEO to at least 6 of the 11 meetings, and a board member to at least 3. Two-thirds (32 organizations) met the CEO attendance requirement, and 25 organizations met the board attendance requirement. Large numbers of members report that these leaders placed a higher priority on audience building after going to Roundtable meetings (Figure 17).

Figure 17. Leader Reaction to Roundtable Meetings



Board members are usually not from the arts world, and simply do not understand what’s required to grow and retain audiences. For some, Roundtable attendance helped provide that perspective.

Having board members attend was a plus; it helped them look at audience development in a new way.
Staff Member, Small Organization

Our board member saw it as valuable. Before, he was asking why I kept going to the meetings—it was a time commitment, and it wasn’t helping us get any funding. But now he gets it, he sees the value in what we’re learning in the Roundtable.
Executive Director, Small Organization

One is on the committee for strategic planning, and it helped her ground herself in the day-to-day of what we’re dealing with, instead of the corporate world that she retired from. She got a better understanding of the underlying work that goes into the numbers that they’re used to seeing.
Staff Member, Large Organization

But getting board members to attend is challenging, because even though audience building is important, the content in the Roundtable may not always be relevant to them and attendance, for many, requires taking time off from work.

The board members I brought saw value in it, but I had to invite them strategically to meetings that were in their interest areas outside of my organization. This is not their industry, so them sitting through a meeting about interested non-attendees and how the symphony created an audience, for a whole day, they’d definitely see it as a waste of time. We’re also dealing with board schedules. If I ask them to just take off a day of work because there’s an audience-development meeting, I would not have gotten them to come.
Executive Director, Small Organization

Their job is not to market shows. Their job is not to oversee our marketing shows. They're much more high level than that. They need to be aware of it and know that it's important but they don't need to spend six hours sitting in a conference listening to someone talk about marketing. It's not a good use of their time.

Executive Director, Midsize Organization

When it works, leader participation provides the language and buy-in to participate in discussions about audience building.

It's now a topic at every board meeting and every executive committee, they see the value. They always knew the value about marketing and getting audiences, but I think now they can be a part of the dialogue with the terminology and things like that. We've now got a special committee that's been formed and I'm getting more participation from them in this area.

Executive Director, Midsize Organization

Not everyone has engaged leadership. Some members point out that this broader resonance remains a challenge getting in the way of organizational change.

Our artistic director came, but was a skeptic, and just didn't believe the data. Going to a data-centric view of how to build audience is a little challenging for someone with an exclusively artistic worldview. The data did not match that worldview, so it's invalid. It will take time for that to become an accepted input into their decision processes.

Anonymous Roundtable Member

Trending upward since the Roundtable's first year, more members say their organization focuses resources on attracting target audiences (Figure 18), and staff structures have been changing to focus on audience building at a fairly steady rate. Members are also more likely to agree that their organizations allocate sufficient resources to audience development than during the period before they began participating in the Roundtable (Figure 19), but that number has not budged since last year and there is room for growth; only 9% agree strongly, and an additional 40% agree somewhat.

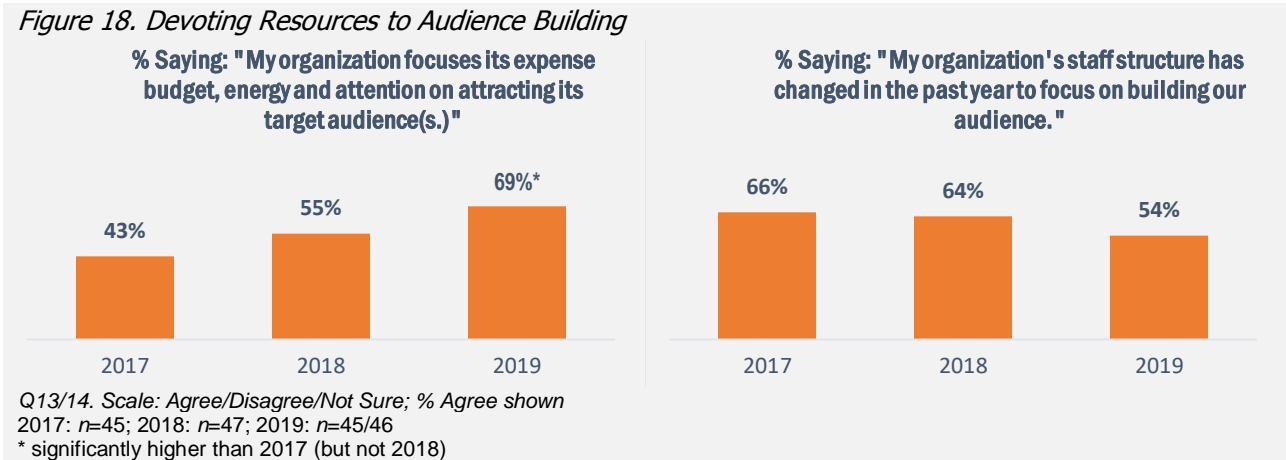
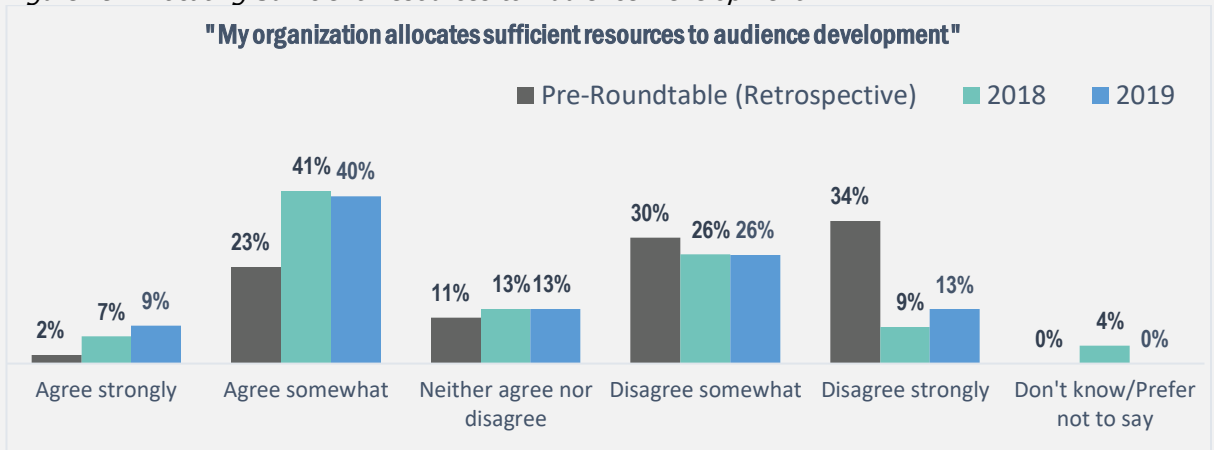


Figure 19. Allocating Sufficient Resources to Audience Development



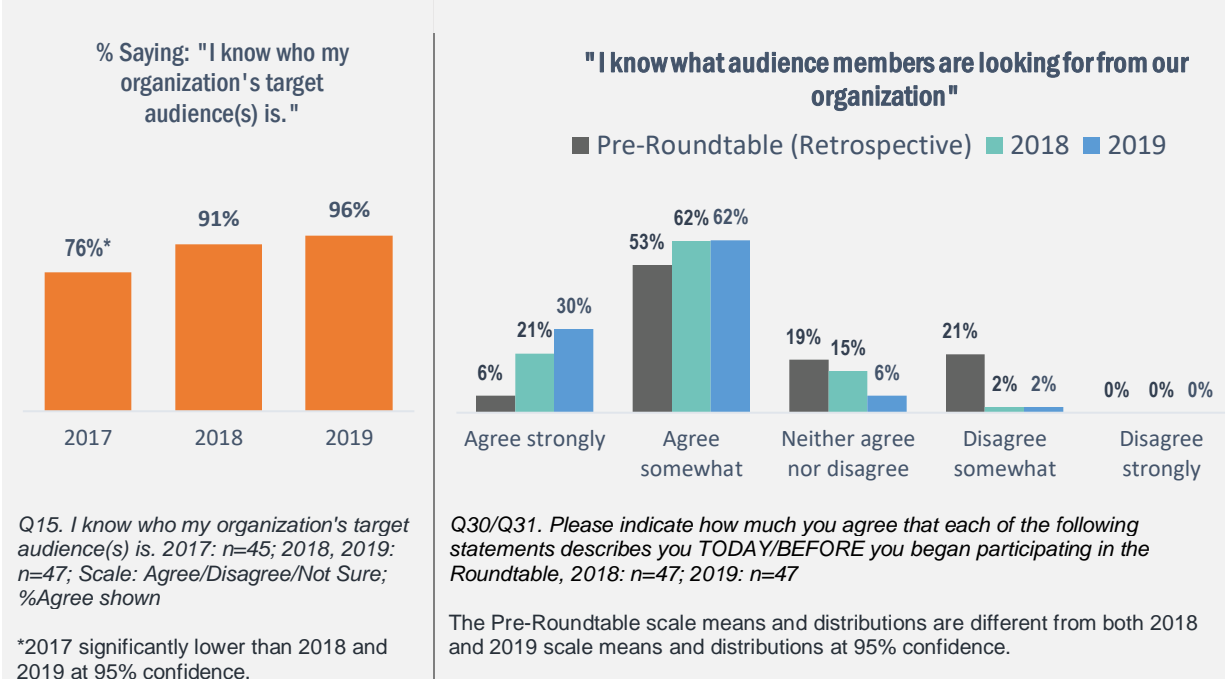
Q31/Q32. Please indicate how much you agree that each of the following statements describes your organization TODAY/BEFORE you began participating in the Roundtable, 2018: n=46; 2019: n=47

The Pre-Roundtable scale means and distributions are different from both 2018 and 2019 scale means and distributions at 95% confidence.

AUDIENCE-BUILDING IMPACT

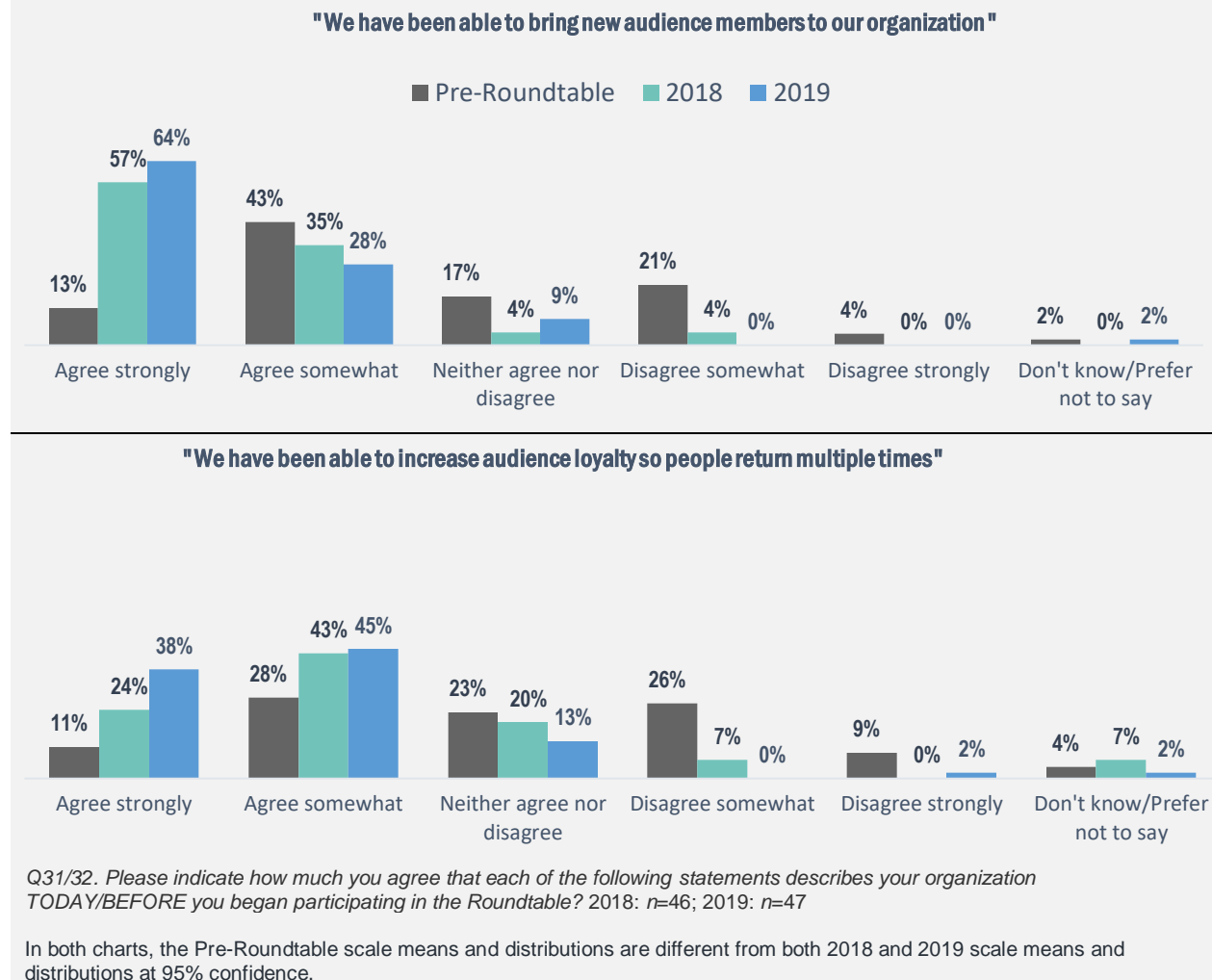
Roundtable members believe they are on the way to seeing results, but they are not yet hitting the bottom line. Virtually all (96%) say they know *who* their target audience is, on par with last year and significantly higher than the 2017 survey (76%). Three in ten (30%) agree strongly that they know what audience members want from their organizations, and an additional 62% agree somewhat that they do.

Figure 20. Understanding the Target Audience



Roundtable members say that their organizations are more likely to agree that they can bring in new audiences, as well as return ones, since before participating in the Roundtable (Figure 21). Of the two objectives, they have the most room to grow in terms of retention, and are increasingly confident there. The increase from 24% to 38% among those who strongly agree they have been able to increase audience loyalty trends toward statistical significance (it surpasses 90% confidence).

Figure 21. Audience Growth and Loyalty



The percentage of revenue that derives from earned income has held steady since this question was first asked in 2017 (Figure 22). Roundtable members are less likely this year than last to say they “don’t know” how many patrons are repeat (Figure 23), so the number saying that any given percentage is higher has increased, but there is no meaningful movement here.

Figure 22. Earned Income

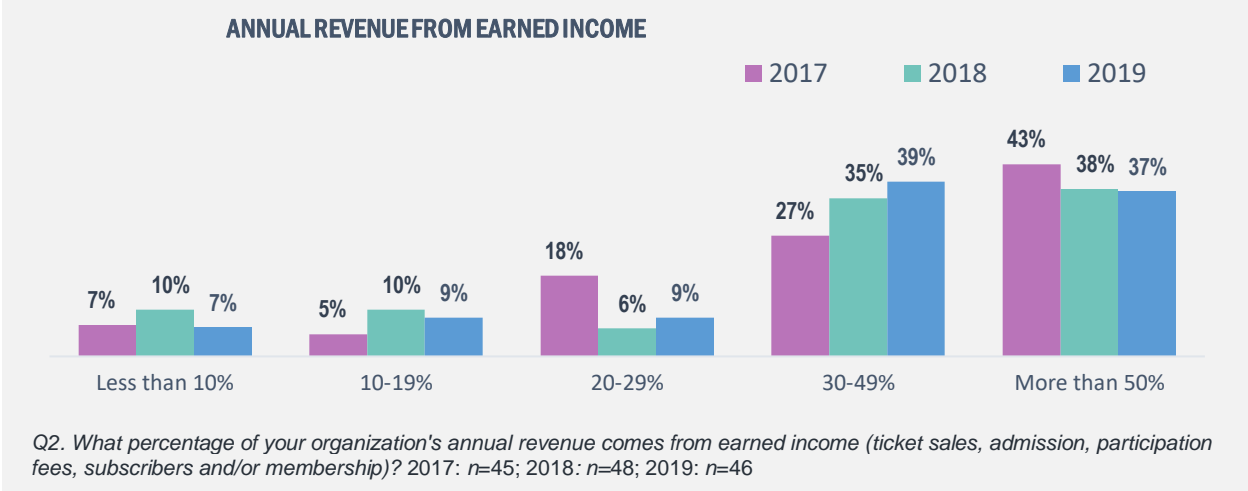
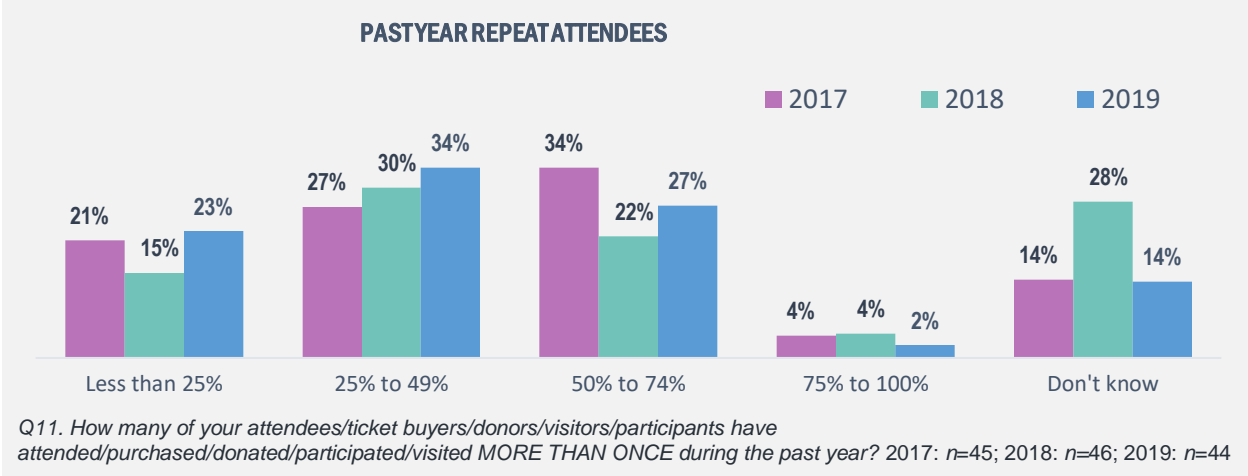


Figure 23. Repeat Attendees



Unprompted, members say that there's still some time before they see growth, but the process has been set into motion.

Because our large audience only happens once a year (our October festival), we have a slower time span in which to iterate. This means it can take years for us to plan, implement then evaluate our initiatives re: audience building. Our progress has been definite...but because we are still in the building and implementing phase, we have not yet experienced the rewards of a needle obviously moving. It will come.
Survey comment, Midsize Organization

The ABR has fundamentally changed this organization. From staffing, to the choice to combine all our different ticketing/development/events systems to one, to the way we market and work with organizations. In 2019, we will more fully see those results as these systems were implemented in 2018.
Survey comment, Large Organization

Organizations are resistant to change, and it takes time to go from hearing ideas to accepting them, and then implementing them.

I don't think the numbers necessarily reflect our growth, which to this point is in philosophy and processes. We have seen some progress in what we're doing as an organization, embracing the philosophy of design thinking and the patron ladder. It just takes a long time for an entrenched organization like ours to move significantly in a different direction. ...The board is now considering a new position to support audience development, and that was through iterative learning with the Roundtable...but it took time for that to bubble up.

Staff Member, Small Organization

And even once they decide to implement, there's a learning curve.

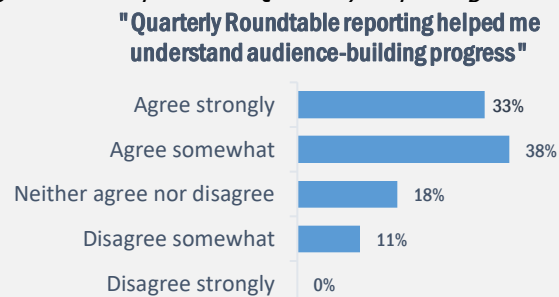
We're still trying to figure out what the single-ticket to multi-buyer path is and the communication points need to be. Subscriber to donor we've got. ...Some of it is understanding what that right path is, and how those people are behaving and we're starting to get a better handle on that because we're now two years in, watching the data, and were beginning to see some of that trend.

Staff Member, Large Organization

REPORTING REQUIREMENT

Regardless of how they otherwise felt about it, a majority of members (71%) agreed that quarterly reporting helped them understand their progress toward achieving audience-building objectives.

Figure 24. Response to Quarterly Reporting



Q40. How much do you agree with the following statement: Reporting quarterly metrics to the Roundtable helped me better understand my organization's progress toward building audiences, n=45

For some, reporting gave structure and accountability to their Roundtable participation.

This year, the Roundtable became a real business. The reporting requirements made us accountable. I get it—we need to be.

Staff Member, Small Organization

If you don't stop and think about what you've done and look at where you are, there's no point.

Executive Director, Midsize Organization

Common reporting gives members a shared common ground, strengthening their ability to connect.

We track so many different ways ourselves. It's nice to know that Atlanta venues are tracking the same exact way. In ABR, we're all using the same language and same formats, and are reporting things in the same ways.

Staff Member, Large Organization

When everyone in the room has to meet the same requirements, it increases the level of respect you can have for each other. And that's important because we are all really different.

Executive Director, Midsize Organization

For those who had larger staffs or were used to reporting, the requirement was not a problem.

For me, it's relatively nothing because I have all the information at my fingertips.

Executive Director, Midsize Organization

In some smaller performing arts organizations with few programs and smaller staffs, reporting was challenging and members did not always see the value. Even so, they understood that the commitment was an important part of their participation.

It's a struggle for us, because we are data poor. The requirement is new, and everything is done by hand.

Staff Member, Small Organization

I know that it is necessary, so I am not about to complain about it. But I hate the process. Its tedious and time consuming, and for us our numbers almost never change drastically. At times, I was calculating a few dozen people, and trying to figure that out over the past few months.

Staff Member, Small Organization

A few organizations said that although the original reporting request may not have aligned with their season or key metrics, fulfilling the request got easier and more valuable over time as the report structure became more accommodating.

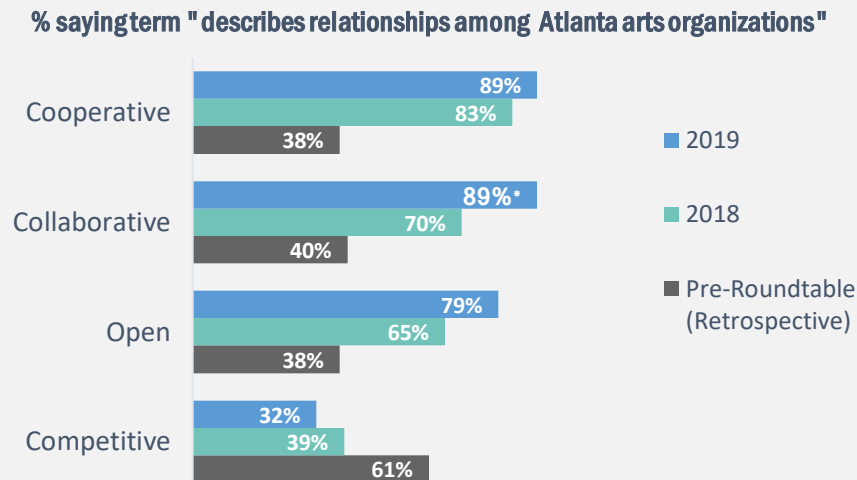
Through the process of the Roundtable asking us for data and us responding, the request for data has become clearer. There was a learning curve. I think we've all come off the curve and benefited from that discussion.

Staff Member, Midsize Organization

THE ATLANTA ARTS COMMUNITY

In 2018 following the first year of the Roundtable, members noted that they felt less competitive with other arts organizations, and a greater sense of cooperativeness, openness, and collaboration (Figure 25). Perceptions of relationships among arts organizations as open and cooperative have remained high over the past year, and the number that describe those relationships as collaborative has risen even further.

Figure 25. Relationships Among Atlanta Arts Organizations



Q. 33/34. How well would you say each of the following words describes relationships among arts organizations as a whole in Atlanta TODAY/at the time BEFORE you participated in the Roundtable? (5-point scale where 1=describes very well and 5=does not describe at all); Net of "1" and "2" responses shown), 2018: n=46; 2019: n=44-45.

The Pre-Roundtable scale means and distributions are different from both 2018 and 2019 scale means and distributions at 95% confidence.

Earlier it was mentioned that the Roundtable was a space for its members to focus on audience. It is also a space to learn about other organizations, and potentially identify synergies.

The opportunity to be in the room with each other has definitely strengthened my relationships with other organizations in the community. We get so caught up in our organizations that sometimes we forget that we can benefit each other.
Executive Director, Small Organization

Many respondents spoke of a new conviction this year that growing the arts audience was good for all—that attending at one institution would lead arts patrons to attend other organizations. There was more discussion of “multi-buyers” than before, and a belief that a large community of active Atlanta arts patrons is in everyone’s interest.

Working together, or at least learning together, has made me feel much less competitive and more collaborative with my fellow arts organizations. And it's really helped me understand that if one of us survives, it increases the opportunities.
Executive Director, Midsize Organization

Everyone used to be very polite but closed, because they were kind of in competition. That sense that “you’re my competition” is going away, we’re more comfortable disagreeing and really talking because we’re not seeing each other as “you’re going to steal my donors or my patrons,” but instead as a greater community.

Staff Member, Large Organization

What’s come of it is so much more openness to share and not being resentful of somebody [taking your ideas].

Executive Director, Large Organization

Members did not take this newfound sense of community for granted. And at the same time, raised concerns (unprompted) about it disappearing if the Roundtable were to no longer exist.

If there’s not a Roundtable, arts organizations in Atlanta will go back to our little silos. And as new arts organizations come in or a new leadership materializes in the current organization, we’ll go back to being fragmented again. ...We need the Roundtable to hold us together.

Executive Director, Midsize Organization

I’d be afraid that if the Roundtable went away, people would fall back into their silos of not wanting to cross over, or being afraid to open up and share information with other organizations.

Executive Director, Midsize Organization

Members also appear to more readily see commonalities than before.

I value the diversity. The stories transcend art form and size. The larger organizations have more resources than the smaller, but it’s the processes, the processes work.

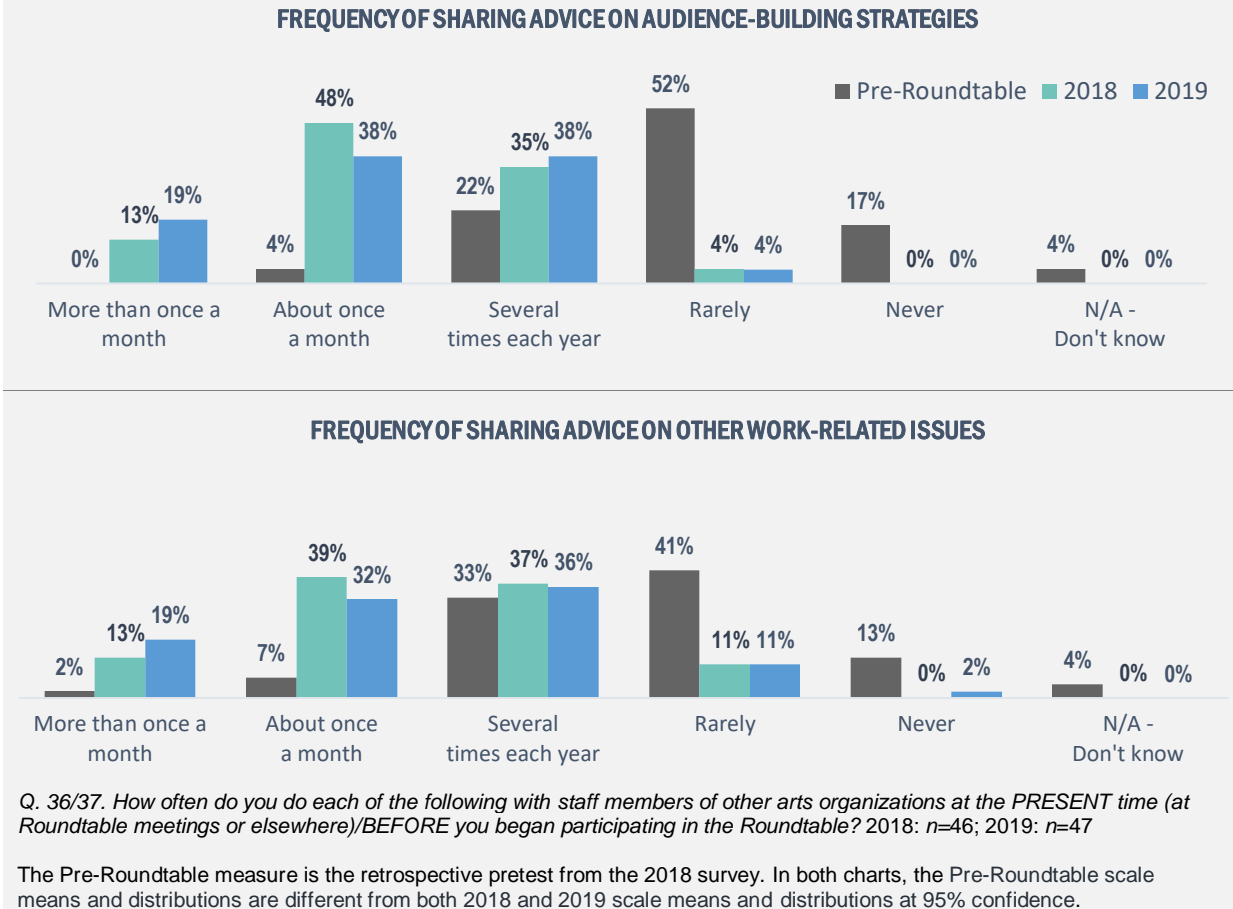
Staff Member, Small Organization

[In looking for ideas to adapt], we’re not looking at venues as much. We’re looking at people that serve some of the same audiences that we have.

Staff Member, Large Organization

Last year, Roundtable members compared the frequency with which they conferred with staff at other arts organizations before the Roundtable and at the present time, and said that was happening more often since the Roundtable began. That finding has held steady. Whereas 4% said they shared advice on audience-building with other arts organizations at least once per month pre-Roundtable, 57% say they do now (Figure 26, top). They also share advice on other work-related issues more often than before the Roundtable (Figure 26, bottom).

Figure 26. Frequency of Sharing Advice with Staff in Other Organizations



The growing sense of shared outcomes has encouraged members to share resources, because they no longer see audience-building as a zero-sum game but instead one where a win for one organization is a win for many.

People are more open to sharing and realizing that sharing isn't detrimental to your own audience. It helps expand the audience for everyone, raising everybody's boats. That's one of the biggest things to come out of having ABR and everyone being involved in it.

Staff Member, Large Organization

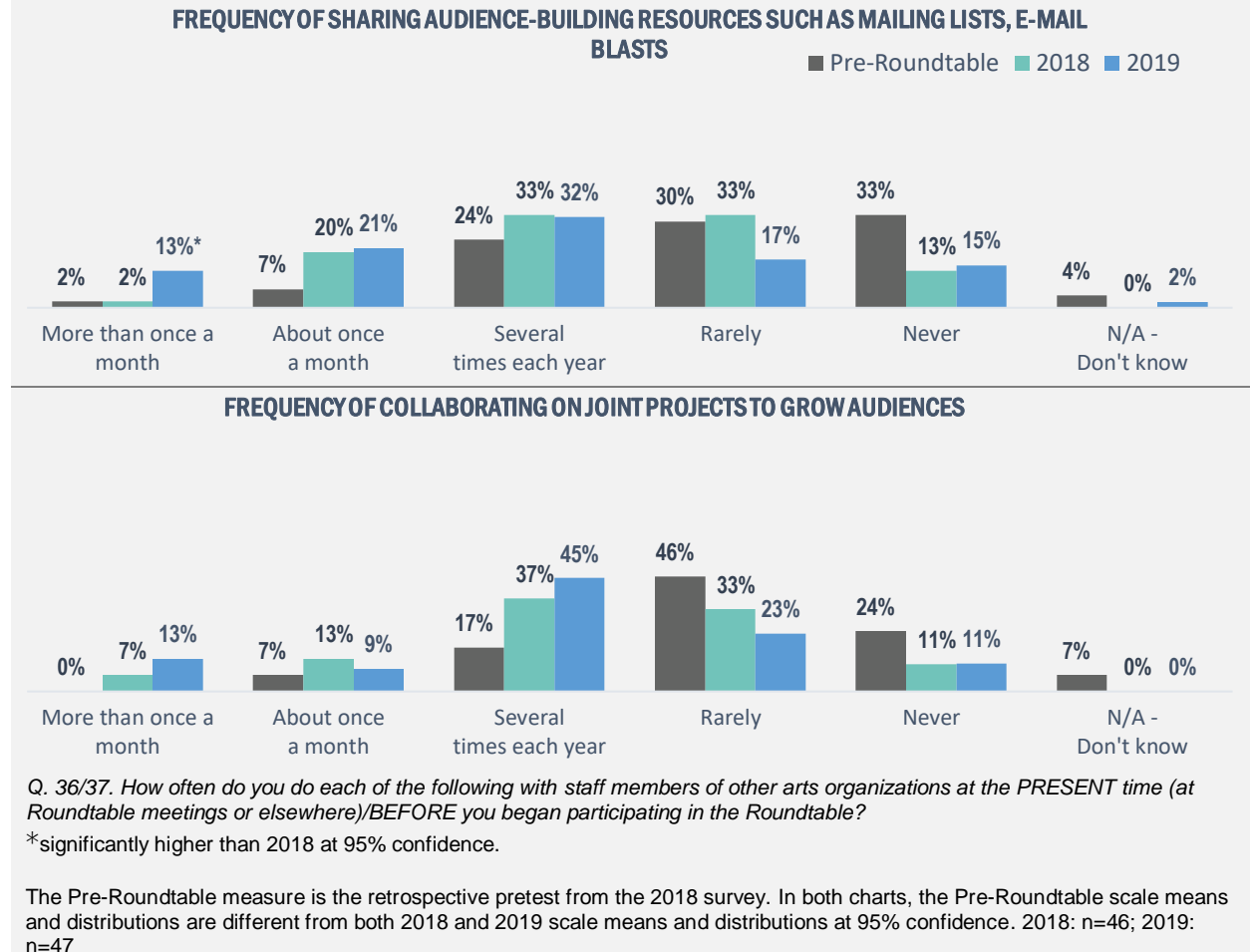
The big guys have been more willing to work with us and share marketing information and to market on our behalf and we market on their behalf in exchange. We also now have a whole list of people we know who to call for help. There's much more willingness to work together than there ever was in the past.

Executive Director, Large Organization

Moreover, whereas 63% and 70% say that before the Roundtable they rarely or never shared audience-building resources or collaborated on a joint project to grow audiences, respectively, two-thirds (66%) say they now share audience-building resources at least several times per year, and

collaborate on audience-building projects (Figure 27 top and bottom, respectively). Both of these metrics are trending upward, and the increase in the number that says they share audience-building resources at least once a month (from 2% to 13%) is statistically significant.

Figure 27. Frequency of Cross-Organization Collaboration



As trust grows and common interests are found, partnerships and collaborations have developed.

We are talking to other arts organizations and exchanging opportunities. So, for example, on Sunday our members were invited to an exhibition and tour of another Roundtable member museum. And then in exchange, their docents are coming here on Friday for a tour of our exhibition. We've done that with a theater, we've done it with a dance company, opening up opportunity to other organizations with our constituents and then inviting them to bring their constituents here in exchange. ... We want to share our audience with them, which is younger and desirable to them, but we also want to have their audience, which is a different generation. Understanding and having a common ground for a few hours every month where you're sitting side by side and working together, or at least learning together, has made me feel much less competitive and more collaborative.

Executive Director, Midsize Organization

The common language and shared frameworks from the Roundtable are providing a basis for working together at increasingly sophisticated levels.

We're operating at a higher level. We all speak the same language, have the same basic information. And so, when we start our conversations about things, we can easily say, "We're trying to do X, Y, and Z based on the design-thinking model and we're stuck. Can you talk to us about how you might have solved X, Y, and Z?"
Executive Director, Large Organization

THE ROUNDTABLE MEETINGS

A regular cadence of meetings keeps arts organizations focused on audience building, which otherwise takes a back seat to demands to get programming on stage or on exhibition walls.

The constant reminder to keep audiences at the center of everything is needed. The monthly meetings keep that fresh in my mind.
Executive Director, Small Organization

Larger organizations often have difficulty finding that time where staff can tune out all other distractions and come together to focus on audience building.

We're a smaller staff and we all wear multiple hats. We're always going in different directions and we need this to help keep us focused and on task.
Staff Member, Large Organization

The Roundtable has forced us to have four people learning and thinking about the same thing for several hours. And that is not a luxury. ...It creates a time and a space to think about things that we wouldn't probably make the time and space for.
Staff Member, Midsize Organization

Unprompted, members said that they may not need meetings to happen so frequently. Regularly and predictably, yes. But given the knowledge they have gained so far, combined with the requirement that they attend every meeting, it *may be* that meetings could be held a little less frequently.

I'm not sure if it's me, or my job, but this year it's felt like it was a little too much. And now that you have to be there every single time. ...I understand if I don't go I don't learn, but it's that pressure to be there amongst everything else that's going on. Right now, I think that it's going to change in the right direction.
Executive Director, Midsize Organization

I'm okay with fewer meetings, like every other month. I think that would work just as well. Maybe better. It can be stressful to get there.
Executive Director, Midsize Organization

But some think that fewer meetings might soften the Roundtable's impact.

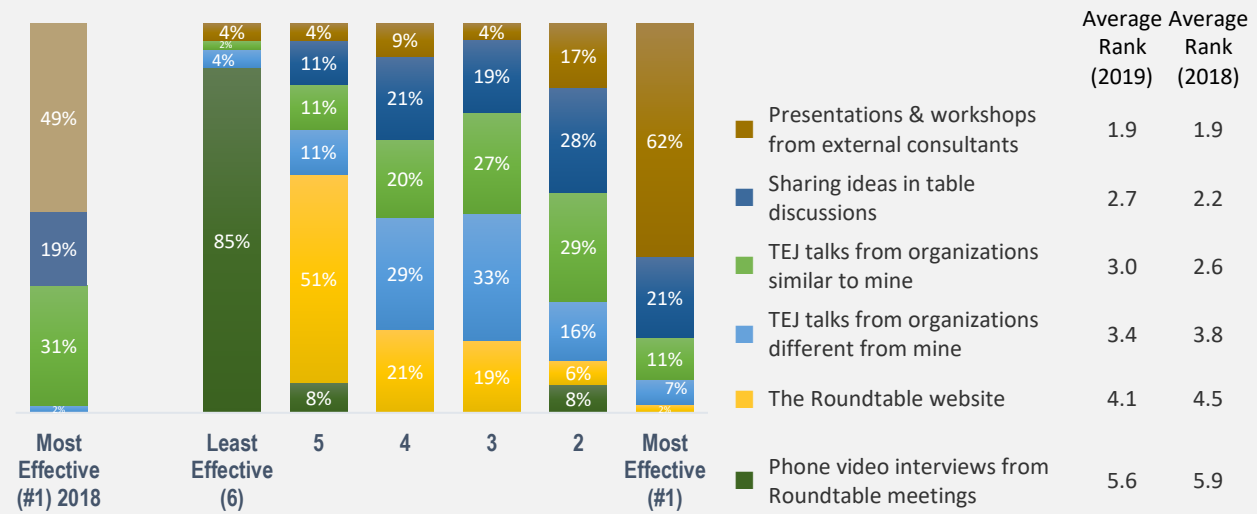
Any time you're not meeting as frequently, it will probably have a different result. I don't know what that will be. I am a fan of the monthly meetings because it does keep me constantly focused on it, whereas if we go a few months without meeting, there's not as much of an incentive to continue the discussions about audience.
Executive Director, Small Organization

And everyone agreed that in-person meetings were critical to the forum's effectiveness.

In today's world of virtual everything, there is still something to be said for us actually physically being together in the same room. There is a whole lot more to be gained.
Staff Member, Midsize Organization

Earlier it was reported that Roundtable members rated expert-led workshops as especially useful. Member rankings of the effectiveness of six individual Roundtable activities (Figure 28) jibe with this appraisal. Sixty-two percent say presentations and workshops from external consultants are most effective—that's up from 49% compared to last year. Sharing ideas in table discussions moved from being the third to second-ranked most effective item, as TEJ talks from similar organizations slipped to the third position, with just 11% saying they were the most effective component, down from 31% last year.

Figure 28. Ranked Effectiveness of Roundtable Activities



Q 23. Please rank how effective each of the following Roundtable activities is in reinforcing what you are learning about audience development (1=most effective, 6=least effective)

Note: N/A option allowed but ranking calculated from valid responses only, deleting N/A, 2018: n=48; 2019, n=47.

Before the Roundtable, many members had much less exposure to new ideas. But now they hear about them, often several times, and that inspires them.

It gives you the encouragement to try new things, from hearing all the experts talk about taking chances. They give you permission in a way, to say, "Let's try, as it might have worked for somebody else." Ordinarily we might say, "We've always done it that way." But we don't say that as much anymore. We try to take other people's ideas and adapt for us, and sometimes they work and sometimes they don't. If they don't, we don't do it again. But at least we try.

Executive Director, Large Organization

Presentations from peers clarify how the concepts presented in workshops can be applied, making them more relevant to members' unique circumstances and giving them their own ideas. The local perspective was stressed by many as important to incorporate, and member presentations and table conversations help provide that.

Meeting other people is good for the smaller conversations for possible collaborations, but also learning best practices from people in your own communities. A lot of times it may be way more beneficial than bringing some person in from outside that might have great ideas about marketing but they don't have any idea how our community works.

Executive Director, Midsize Organization

Some smaller organizations said they felt that the grant process was no longer accessible to them. Some believed that the matching requirement was not feasible for smaller organizations.

Changing to a grant-matching format, with a minimum of \$5,000 match. It has to be new money, it has to be money that's not already in the pipeline. For us, \$5,000 of new money would be onerous, so we had to opt out of that cycle.

Staff Member, Small Organization

I'm not opposed to matching. I think that's an excellent part of a grant. They should all be matched. But why do I have to match it with new dollars? There is no such thing as new dollars for us—that's only in large organizations that have a board member that they can go to.

Executive Director, Midsize Organization

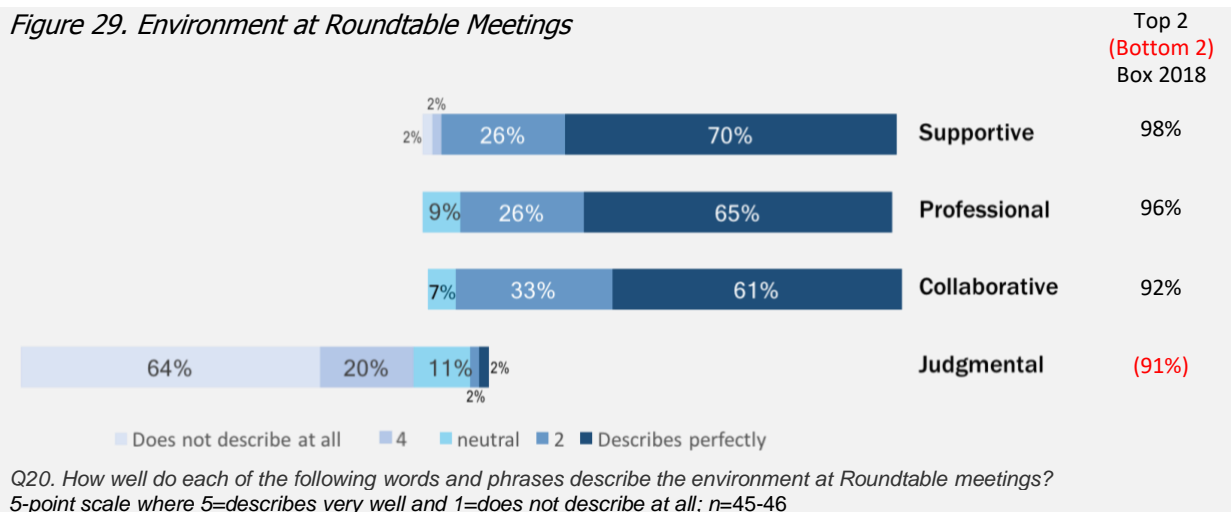
Fewer grants for smaller organizations meant fewer peer-driven examples and presentations of projects that smaller organizations could reasonably implement.

[Before,] a lot of smaller organizations were able to get grant money for their initiatives, so there was a lot of sharing among smaller and midsize organizations, and I got so much out of that. Now, the last few months have been the large organizations, with some really awesome initiatives. I certainly got a lot out of it but those are things we can't do. ...I hope it doesn't lose the focus that it had to make sure that even small and midsize organizations can get to do that.

Executive Director, Midsize Organization

The meetings themselves happen in a climate that promotes sharing. In numbers similar to high levels seen last year, large majorities describe the environment at meetings as “supportive” (70% say that word “describes perfectly” the environment), “professional” (65%), and “collaborative” (61%). Almost no one (2%) says that “judgmental” describes the atmosphere at meetings; most (64%) say that word does not describe it at all.

Figure 29. Environment at Roundtable Meetings



Unprompted, several members praised the curriculum and proceedings for balancing the needs of all members equally, including a mix of organization sizes and art forms, and holding even as attendance has broadened to include board members and chief executives.

I feel when I'm there that a very delicate balancing act is being done between one person organizations and the Woodruff Arts Center, between organizations in the center of town and organizations who are outside the perimeter. The one-person organization speaks as loudly and is heard as well as the Woodruff Arts Center.
Executive Director, Midsize Organization

Terri makes everyone feel valued and smart. That's hard to do. She never made anyone feel insignificant.
Executive Director, Small Organization

Members feel like their concerns are heard, meaning, specifically, the needs of organizations of different sizes and what their audience challenges are. That gives members faith in the process.

Terri cared to find out what our challenges were and to understand the differences between different kinds of audiences in Atlanta. She took our input. She didn't plan the meetings based on what she thought we needed, but based on what we discussed were the needs. It doesn't mean she followed all of our advice, but she was informed.
Executive Director, Small Organization

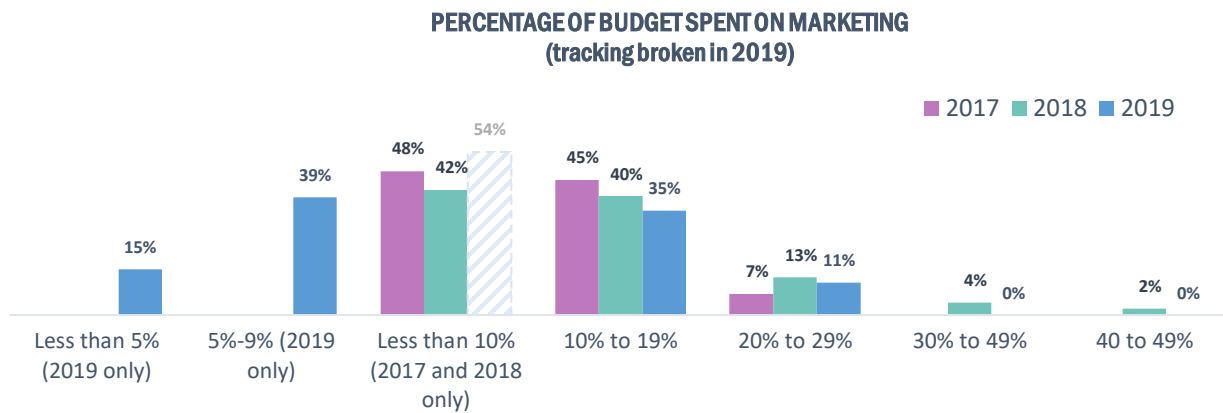
The Steering Committee helped ensure the Roundtable reflected member needs.

Having the Steering Committee of folks that are here in Atlanta and represent varied organizations is really helpful, knowing these were people I could go to.
Executive Director, Large Organization

APPENDICES

APPENDIX I: PERCENTAGE OF BUDGET SPENT ON MARKETING

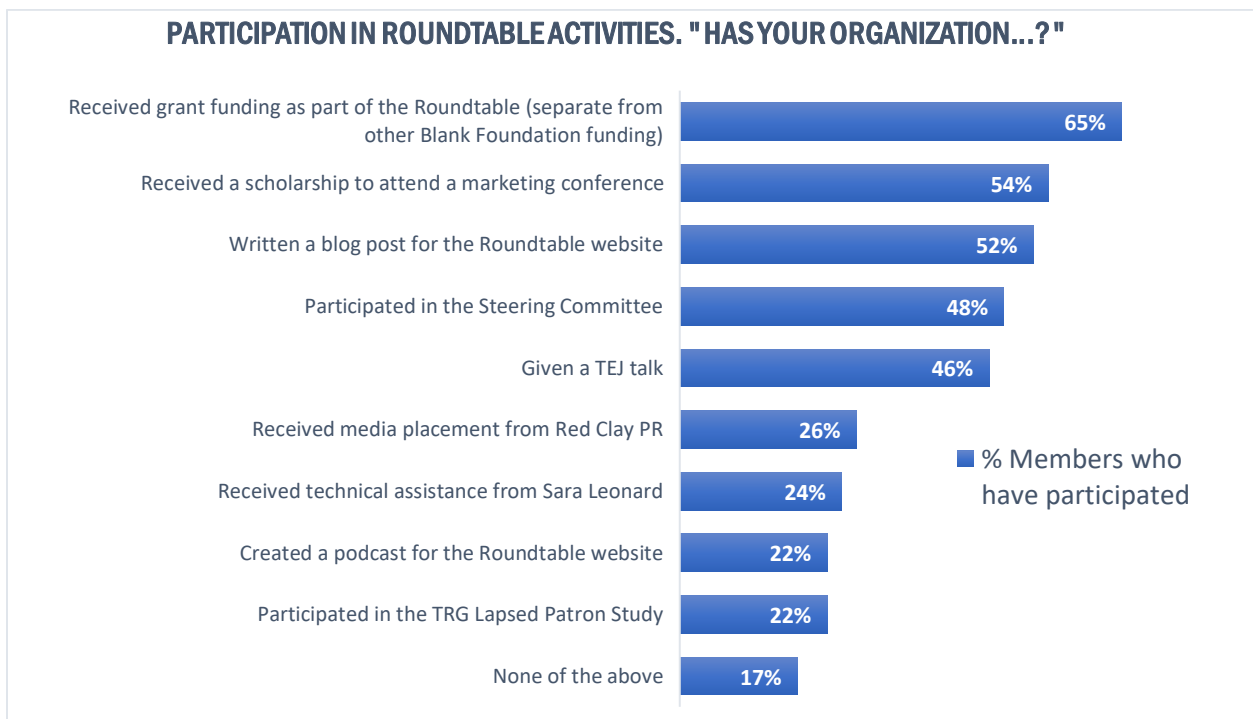
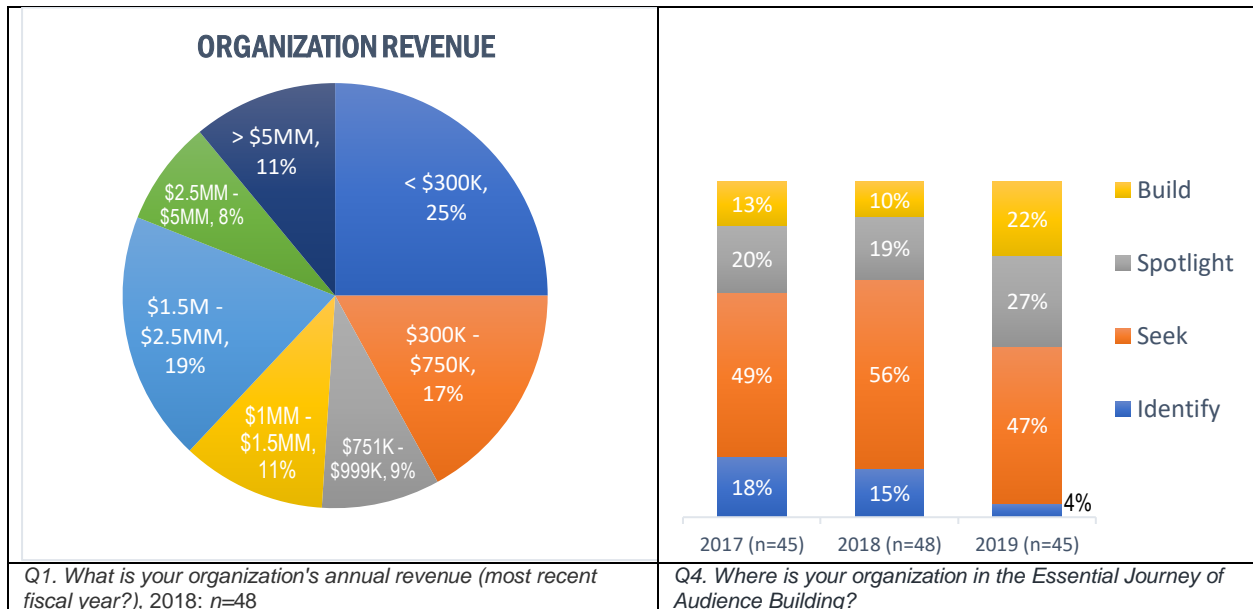
One very important survey item was asked differently this wave than in prior waves: percentage of budget spent on marketing. Because most arts groups do not spend more than 10% of their budgets on marketing, the response categories, where the lowest possible response was “less than 10%,” were not seen as sensitive enough to pick up change. So that first category was broken into two. The sum of responses falling into those two categories (less than 5% and 5%–9%) is greater than responses in “less than 10%” category from prior years, but that difference is likely the result of the difference in response options (“anchoring”), and should not be considered true change. If the survey is repeated moving forward, the question should be asked with the 7 response categories, and change from 2019 to subsequent waves can be considered true change.



Q3. What percentage of your annual expense budget is allocated to marketing and/or audience building (data capture, market research, communications, advertising; including staffing for these functions)? 2017: n=45; 2018: n=46

APPENDIX II: SURVEY RESPONDENT PROFILES

The survey captured a broad cross-section of arts organization sizes. Most members say they are in the “Seek” stage of the audience journey. Just 4% say they are in “Identify” (the difference between the number saying they are in the Identify phase between 2019 and 2018 approaches statistical significance, at 90%).



Q22. Which of the following have you or your organization done as part of the Roundtable? (check all that apply), 2018: n=48