Putting the audience in the center of it all.

An Initiative of The Arthur M. Blank Family Foundation

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Research and Consulting

2019 PROGRAM EVALUATION

Presentation to Roundtable Membership

March 10, 2020

WHY DO AN EVALUATION?

3 QUESTIONS:

1. **Impact of Roundtable on:**
   - **What members know**
   - **What members are doing differently**
       - **Behavior/practice**
       - **Organizations prioritizing audience building**
   - **Results**

2. **What changed between January 2018 and January 2019?**

3. **How does the Roundtable work? (and can we make more effective?)**

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WHAT WE DID

- **10 follow-up telephone interviews in January 2019 with cross-section of membership**

  - 4 small organizations (< $250K): 3 performing, 1 visual/mixed

  - 4 midsize organizations ($250-$1MM): 3 performing, 1 visual/mixed

  - 2 large performing arts organizations ($1MM+)

- **15-minute online survey completed by 47 of 48 member organizations**

  - 74% had belonged since the start (2 or more years)

  - 96% attended at least 75% of prior year meetings (up from 75% who did in Year 1)

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SPECIFICALLY, THE SURVEY ASKED:

- **Who attends and how often**
- **Satisfaction with participation**
- **Putting audience at the center of it all:**
  - **What you're learning about audiences**
  - **New audience-building ideas tried**
  - **Data collection and use**
  - **Experimenting and Investing in audience building**
- **Impact on audience-building results**
  - **New audiences**
  - **Increased loyalty**
  - **Revenue**
- **Broader impact on Atlanta arts community**

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TODAY, YOU'LL SEE WHAT YOU SAID IN 2019 COMPARED TO 3 GROUPS:

- **"Retrospective" ratings of how things were before the Roundtable**

- **2018 Roundtable survey results (and in a few cases, 2017 results)**

- **A survey of arts managers across the US**

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Members are actively engaged in the Roundtable

In 2019, more staff attended from each organization

- 80% of organizations send two or more people

How many people from your organization usually attend Roundtable meetings?

	2018	2019	
3+people	8%	20%	■ 3+people
2 people	48%	61%	■ 2 people
1 person	44%	20%	■ 1 person

2018: *n*=48; 2019: *n*=46

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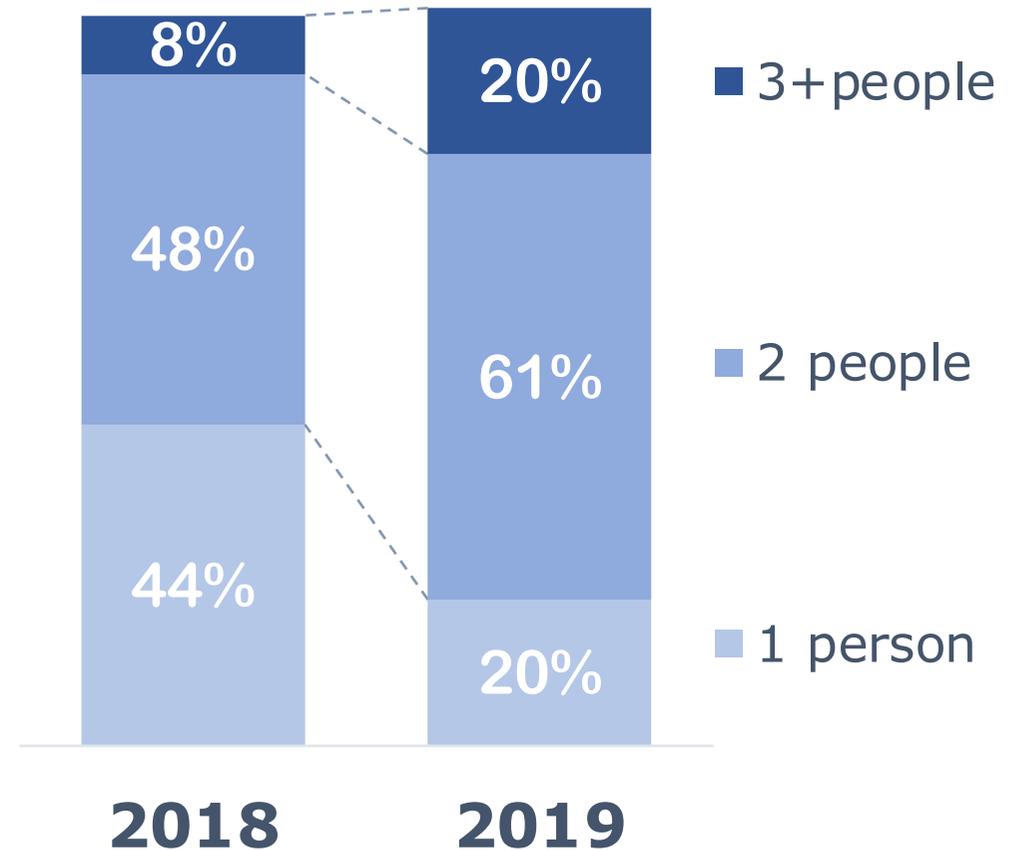
Satisfaction with the Roundtable is high

"My Roundtable participation has been <u>worth the time spent</u>"

Agree strongly
- 2019: 77%
- 2018: 87%

Agree somewhat
- 2019: 21%
- 2018: 9%

Neither agree nor disagree
- 2019: 0%
- 2018: 2%

Disagree somewhat
- 2019: 0%
- 2018: 2%

Disagree strongly
- 2019: 2%
- 2018: 0%

■ 2019
■ 2018

2018: *n*=47; 2019: *n*=47

Ranked reasons for participating

Learn audience building strategies from experts

Learn what other organizations are doing to build audiences

Build relationships with staff in other arts organizations

Get Blank Foundation funding

| Most Important (#1) | 2 | 3 | Least Important (4) |

n=48

For over 9 in 10 members, top draw is learning

Learn audience building strategies from experts — 69%

Learn what other organizations are doing to build audiences — 23%

Build relationships with staff in other arts organizations — 2%

Get Blank Foundation funding — 6%

Most Important (#1)   2   3   Least Important (4)

n=48

Learning is also the second-highest draw

Average Rank

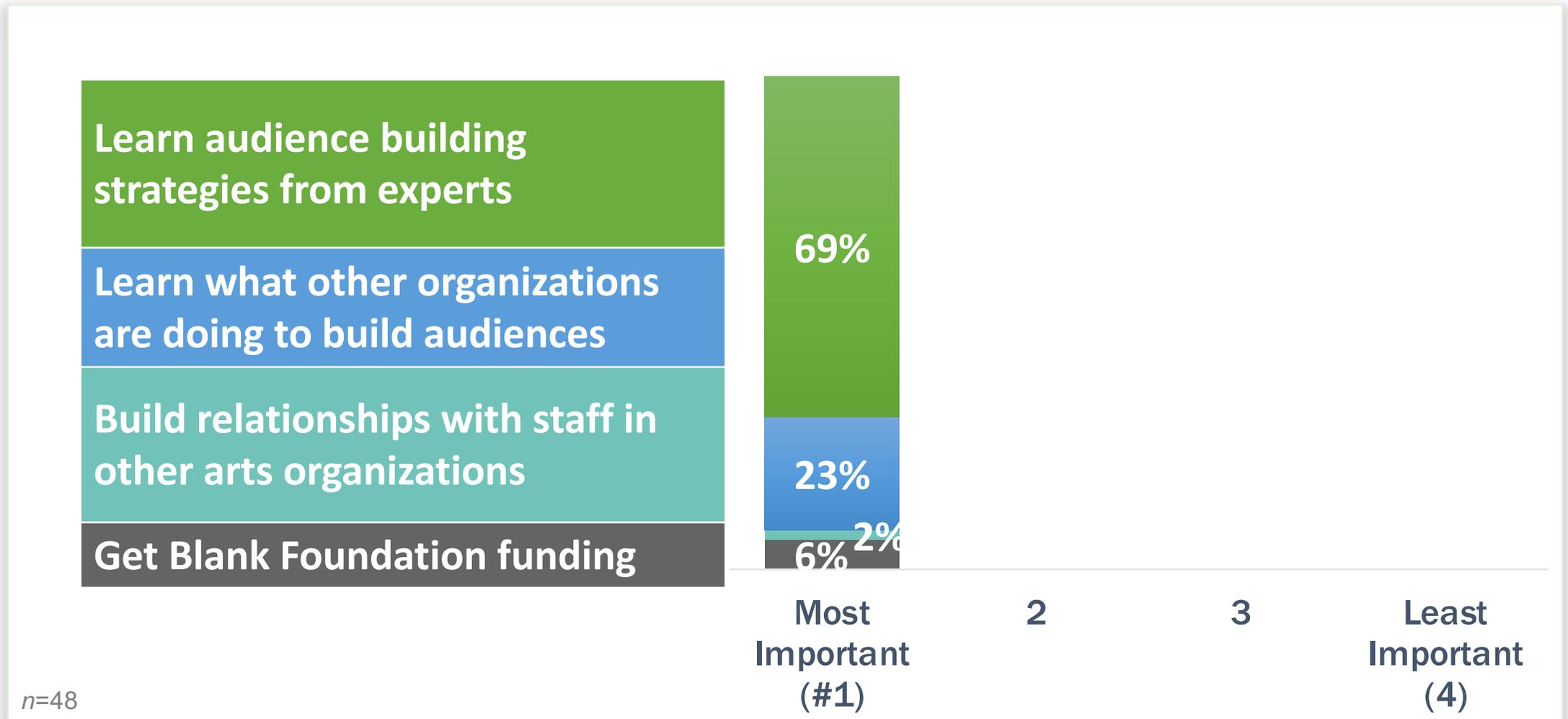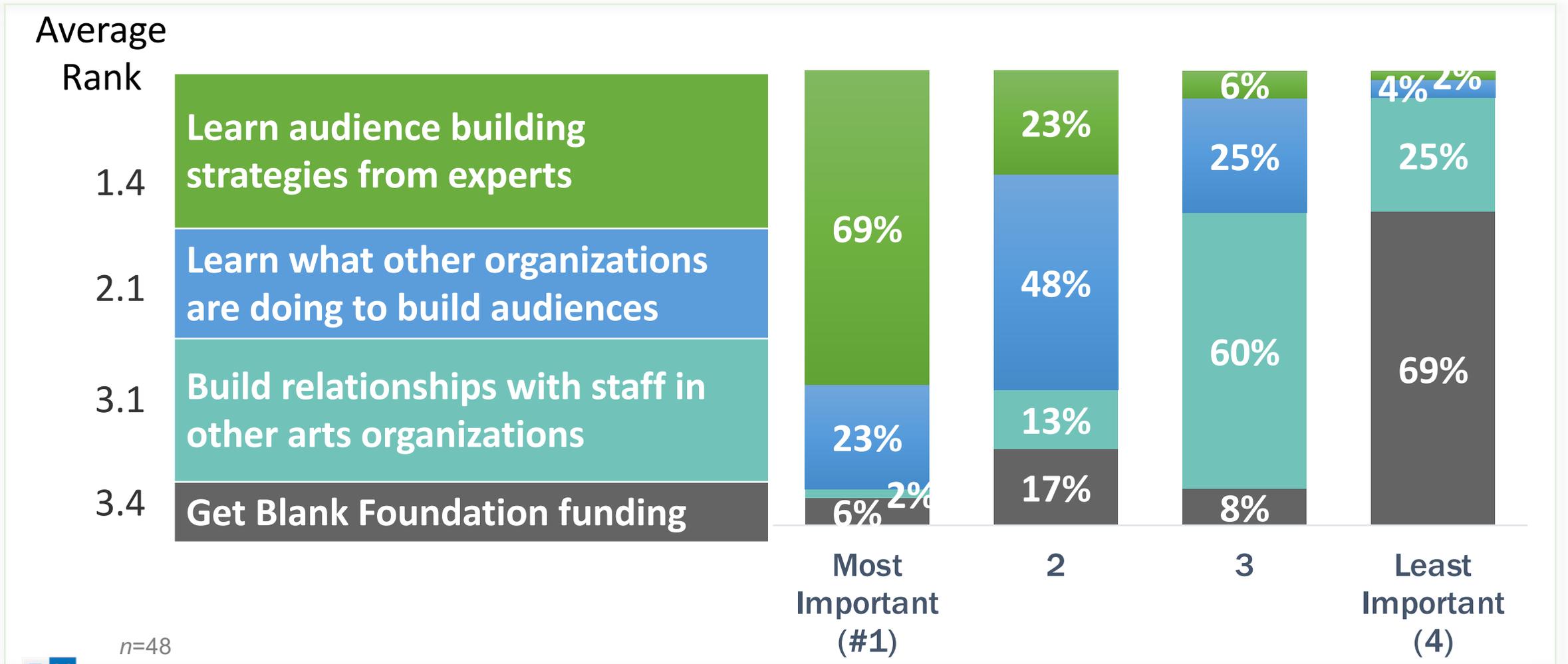|	
1.4	Learn audience building strategies from experts
2.1	Learn what other organizations are doing to build audiences
3.1	Build relationships with staff in other arts organizations
3.4	Get Blank Foundation funding

	Most Important (#1)	2	3	Least Important (4)
Learn audience building strategies from experts	69%	23%	6%	2%
Learn what other organizations are doing to build audiences	23%	48%	25%	4%
Build relationships with staff in other arts organizations	2%	13%	60%	25%
Get Blank Foundation funding	6%	17%	8%	69%

n=48

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Members say they know much more about audience building than before they began the Roundtable

"I have a broad awareness of strategies that can be used to build audiences"
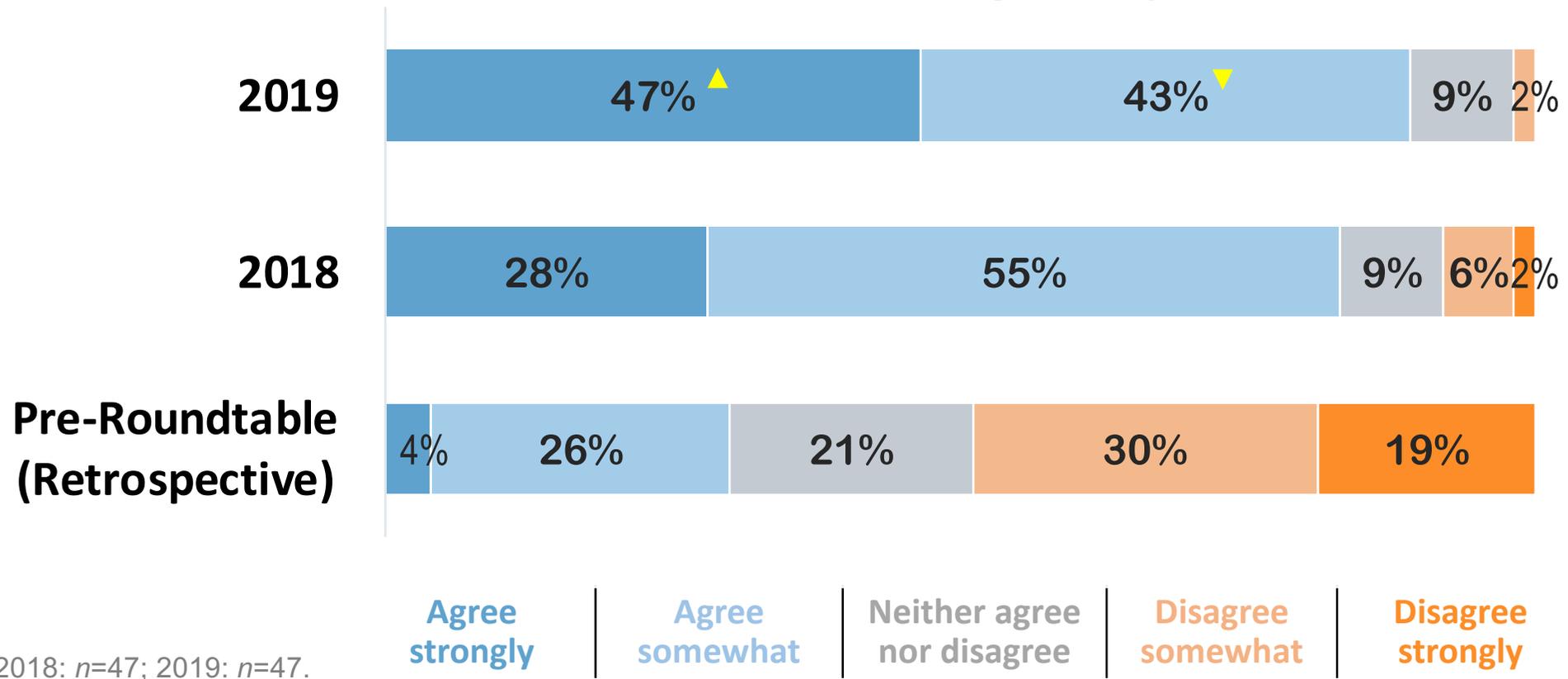
	Agree strongly	Agree somewhat	Neither agree nor disagree	Disagree somewhat	Disagree strongly
2019	64%	34%	2%		
2018	60%	36%	2%	2%	
Pre-Roundtable (Retrospective)	2%	36%	26%	19%	17%
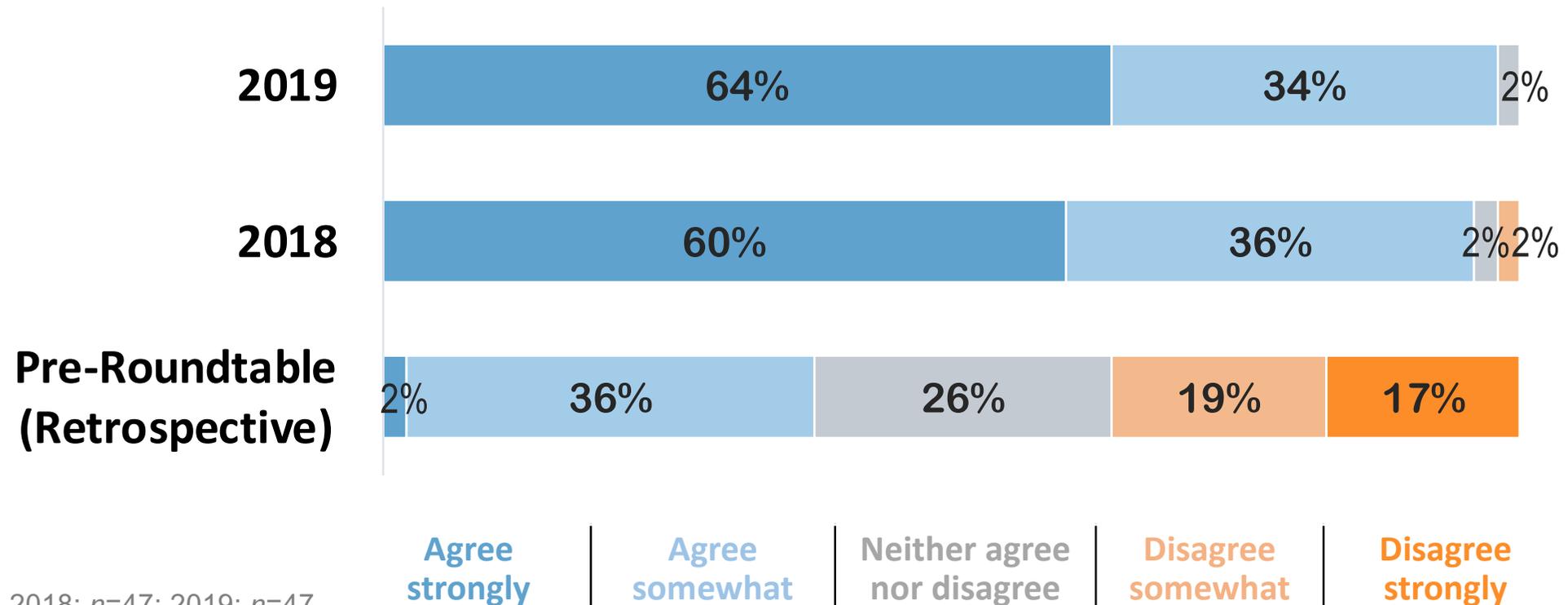
2018: *n*=47; 2019: *n*=47

Confidence in using data to build audiences has continued to grow

"I know how to use data to retain and grow my audience"

	Agree strongly	Agree somewhat	Neither agree nor disagree	Disagree somewhat	Disagree strongly
2019	47% ▲	43% ▼	9%	2%	
2018	28%	55%	9%	6%	2%
Pre-Roundtable (Retrospective)	4%	26%	21%	30%	19%

2018: *n*=47; 2019: *n*=47.

▲ / ▼ Significantly higher/lower than prior year at 95% confidence

Deeper knowledge and reinforcement leads to greater practice

It's helpful that we go back to certain concepts as opposed to latching on to any and all trends. 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.

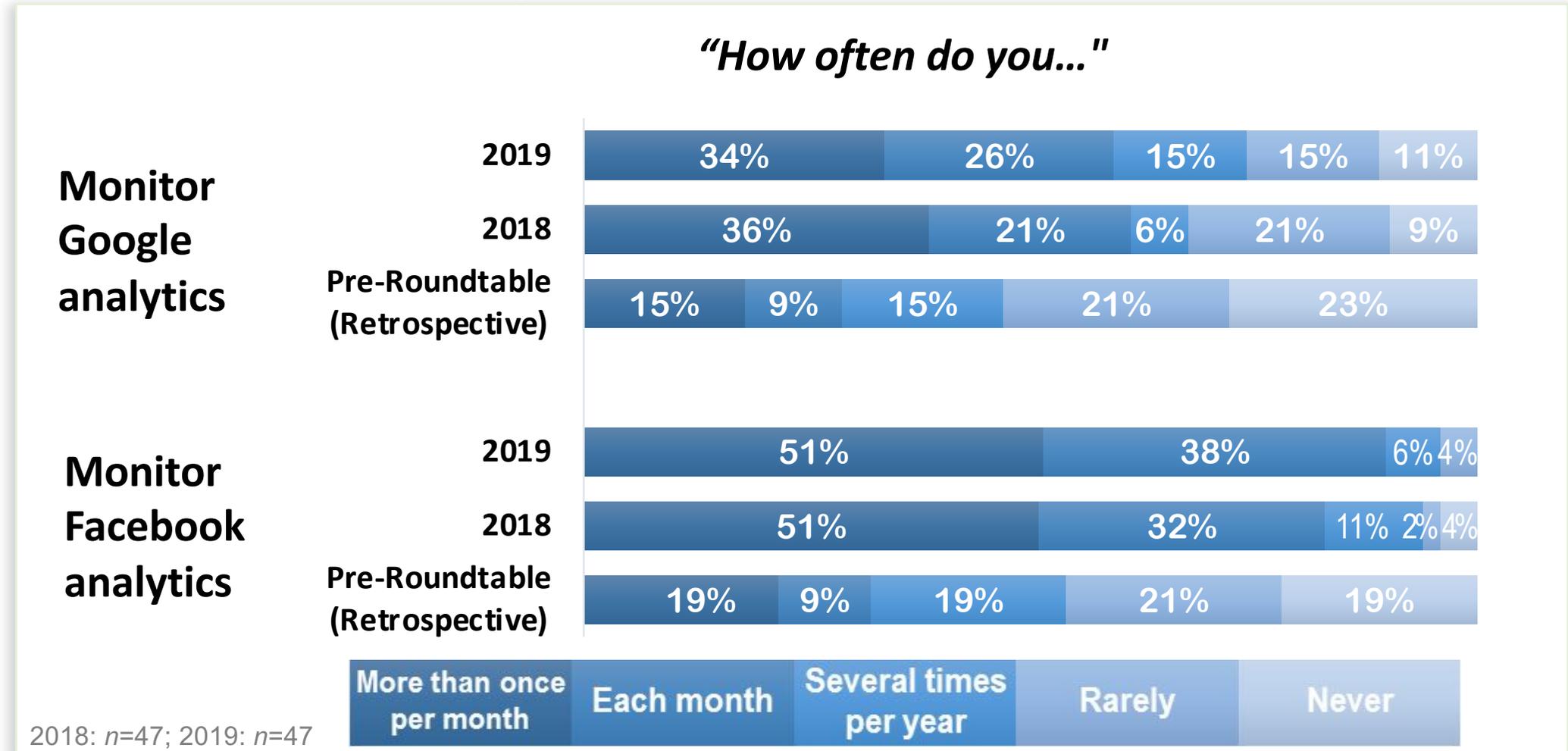**Board Member, Small Organization**

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.

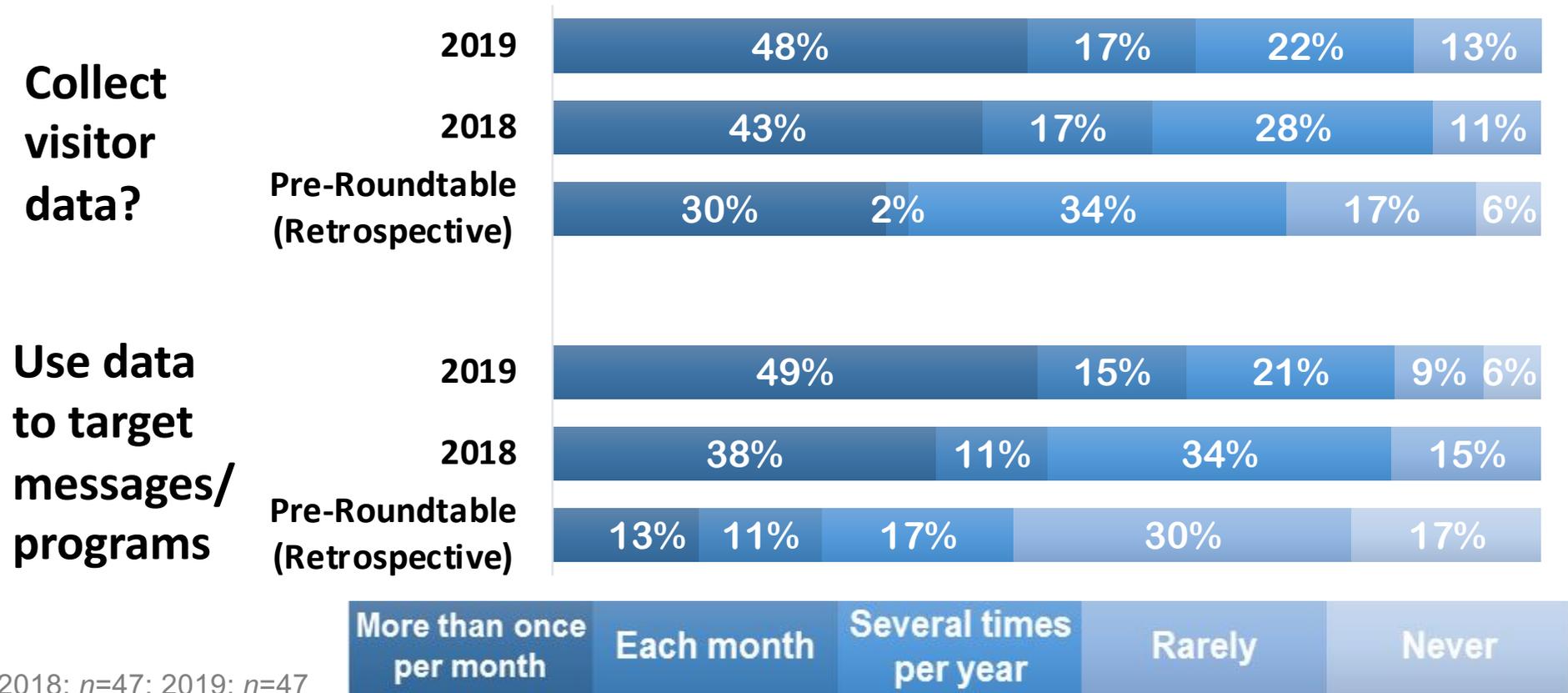**Marketing Director, Large Organization**

Google and Facebook monitoring rose after first year, and has stayed high

"How often do you…"

Monitor Google analytics

	More than once per month	Each month	Several times per year	Rarely	Never
2019	34%	26%	15%	15%	11%
2018	36%	21%	6%	21%	9%
Pre-Roundtable (Retrospective)	15%	9%	15%	21%	23%

Monitor Facebook analytics

	More than once per month	Each month	Several times per year	Rarely	Never
2019	51%		38%	6%	4%
2018	51%		32%	11%	2% 4%
Pre-Roundtable (Retrospective)	19%	9%	19%	21%	19%

Data use continued to rise

"How often do you…"

Collect visitor data?

	More than once per month	Each month	Several times per year	Rarely	Never
2019	48%	17%	22%	13%	
2018	43%	17%	28%	11%	
Pre-Roundtable (Retrospective)	30%	2%	34%	17%	6%

Use data to target messages/ programs

	More than once per month	Each month	Several times per year	Rarely	Never
2019	49%	15%	21%	9%	6%
2018	38%	11%	34%	15%	
Pre-Roundtable (Retrospective)	13%	11%	17%	30%	17%

More than once per month	Each month	Several times per year	Rarely	Never

2018: *n*=47; 2019: *n*=47

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How do Roundtable members compare with arts groups nationwide?

- Comparison data: Nonprofit Finance Fund's *2015 State of the Nonprofit Sector* survey, subsample of over 600 performing and visual arts groups
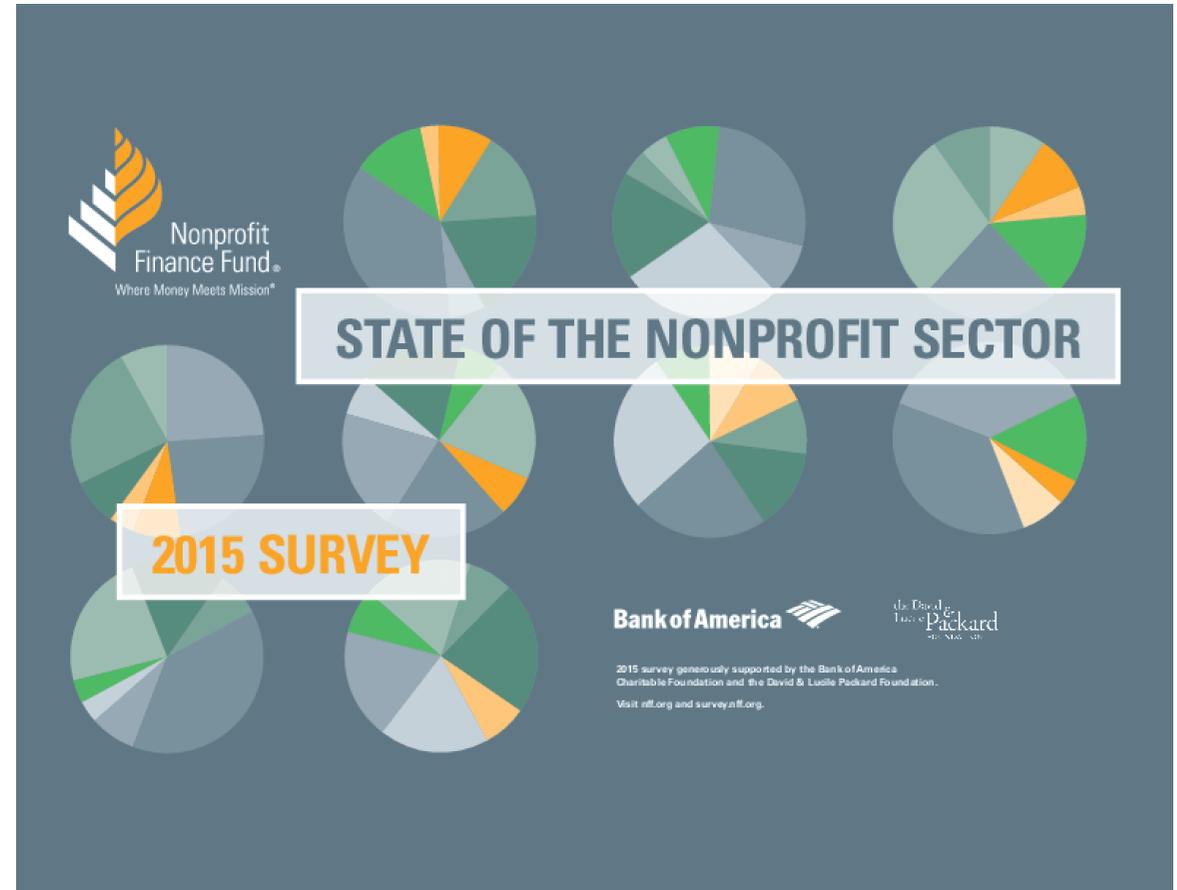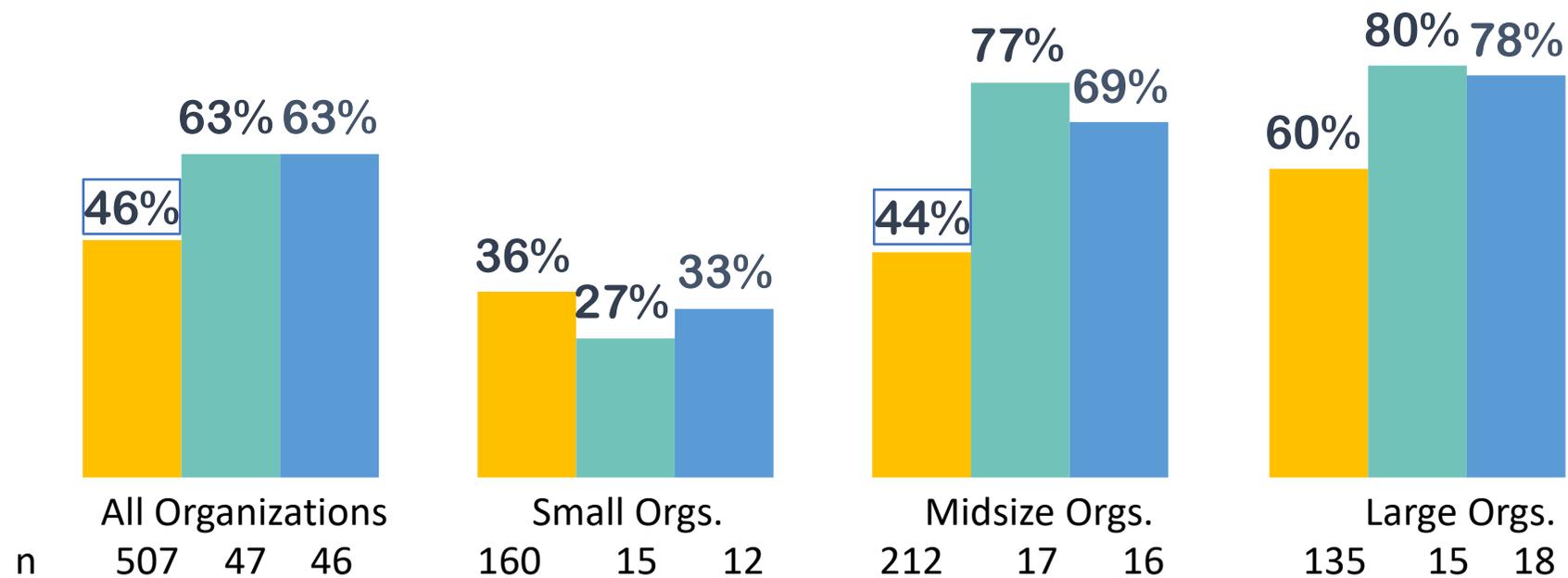
Roundtable members are more likely than arts groups nationwide to have staff dedicated to data analysis

- (driven by midsize, $250-$1MM) and large organizations
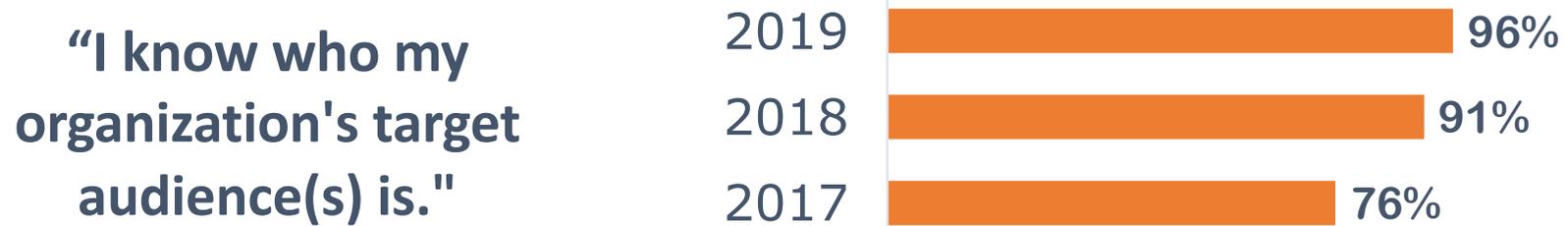
Has Full or Part-Time Staff Dedicated to Data Analysis

■ National Sample (2015)   ■ Roundtable 2018   ■ Roundtable 2019

	All Organizations	Small Orgs.	Midsize Orgs.	Large Orgs.
National Sample (2015)	46%	36%	44%	60%
Roundtable 2018	63%	27%	77%	80%
Roundtable 2019	63%	33%	69%	78%
n	507 47 46	160 15 12	212 17 16	135 15 18

National sample comes from arts groups in the Nonprofit Finance Fund's *2015 State of the Nonprofit Sector* survey

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Boxed group significantly lower at 95% confidence

Knowledge of who target audience is has risen and continued to trend upward

"I know who my organization's target audience(s) is."

2019	96%
2018	91%
2017	76%

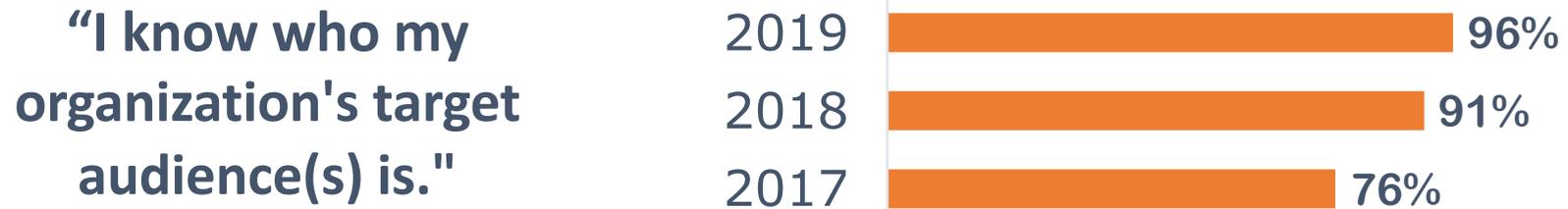*n*s=45-47

Confidence in knowing what audiences are looking for has risen and continued to trend upward

"I know who my organization's target audience(s) is."

2019	96%
2018	91%
2017	76%

"I know what audience members are looking for from our organization"

	Agree strongly	Agree somewhat	Neither agree nor disagree	Disagree somewhat	Disagree strongly
2019	30%	62%	6%		2%
2018	21%	62%	15%		2%
Pre-Roundtable (Retrospective)	6%	53%	19%	21%	
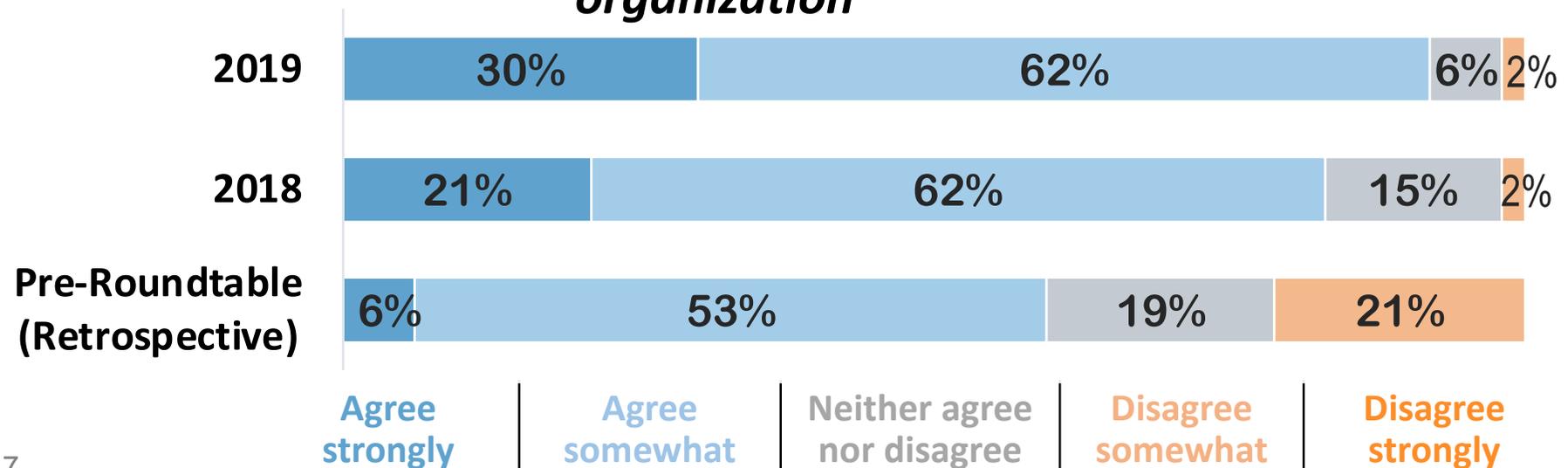
ns=45-47

Members are taking more risks

Organizations became more experimental after Year 1, maintained that in Year 2

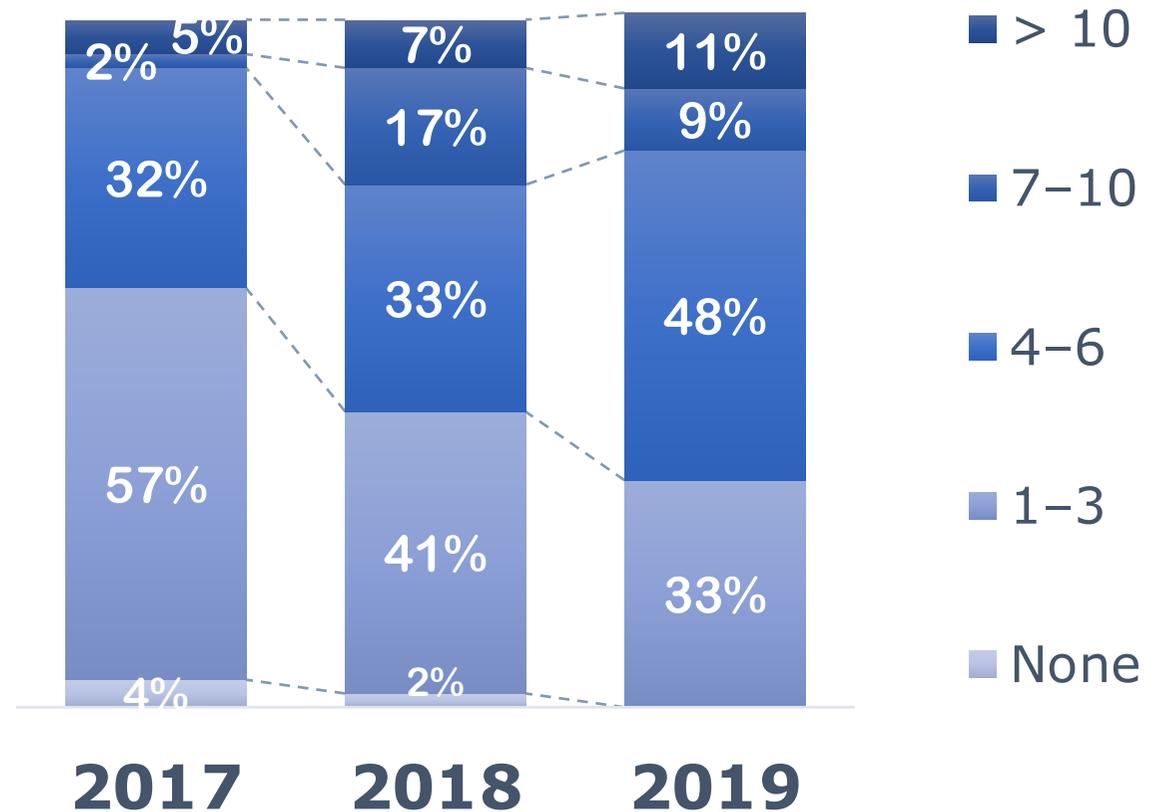*"My organization experiments with new ways to grow its audience"*

	Agree strongly	Agree somewhat	Neither agree nor disagree	Disagree somewhat	Disagree strongly
2019	60%	23%	11%	6%	
2018	57%	33%	7%	4%	
Pre-Roundtable (Retrospective)	19%	28%	23%	19%	11%
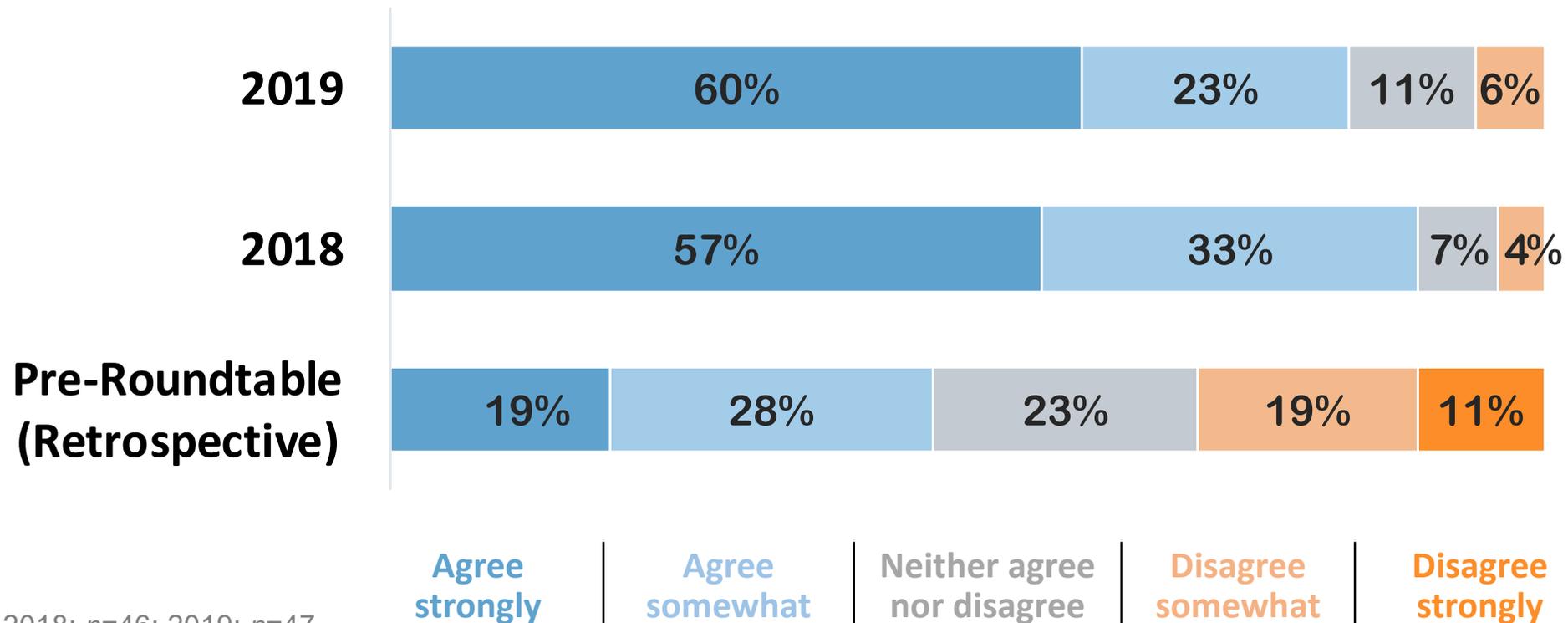
2018: *n*=46; 2019: *n*=47

Members are trying more new audience-building ideas

How many NEW audience building ideas has your organization tried in the past year?

	2017	2018	2019
> 10	2%	7%	11%
7–10	5%	17%	9%
4–6	32%	33%	48%
1–3	57%	41%	33%
None	4%	2%	

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68% tried 4 or more new ideas

How many NEW audience building ideas has your organization tried in the past year?

39%   57%   68%

	> 10
	7–10
	4–6
	1–3
	None

2017

- 2%
- 5%
- 32%
- 57%
- 4%

2018

- 7%
- 17%
- 33%
- 41%
- 2%

2019

- 11%
- 9%
- 48%
- 33%
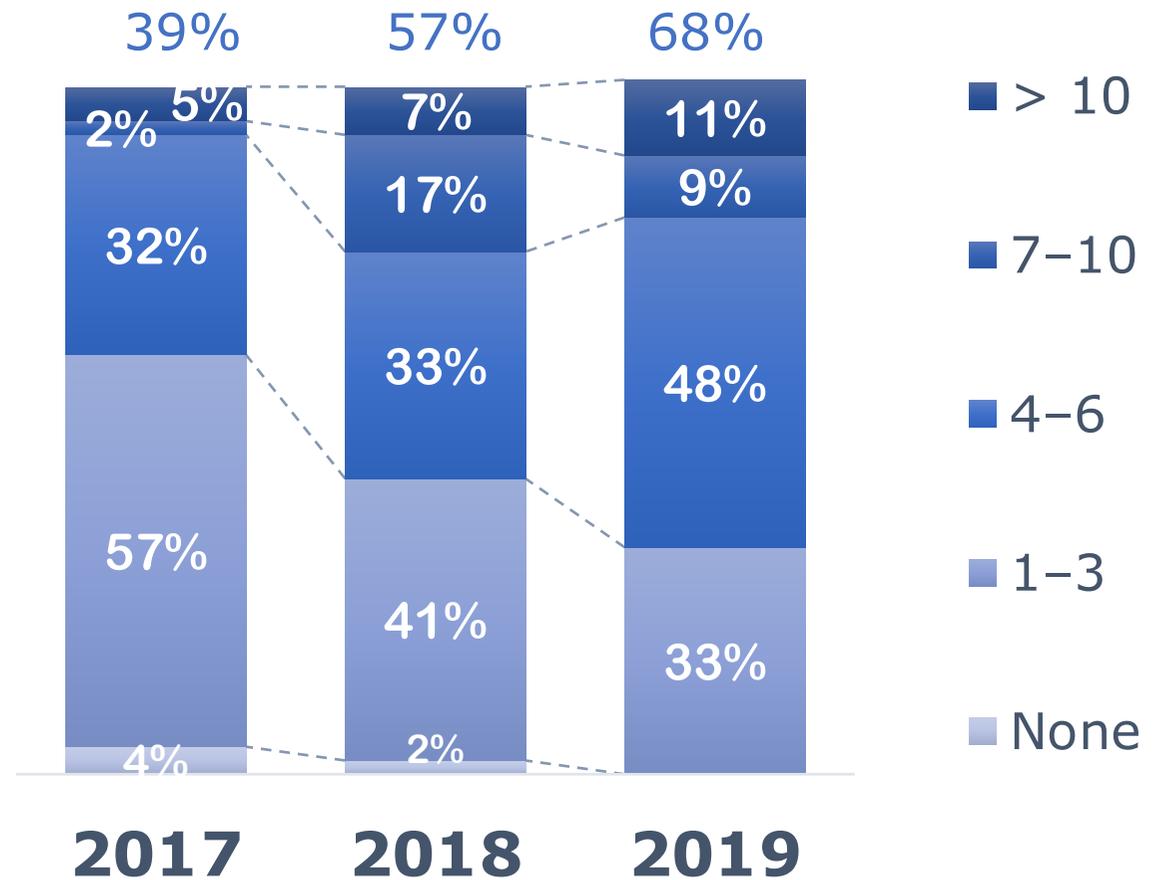
That's where the biggest impact is. We're sending all sorts of things out, as opposed to just sending one thing out and seeing how it works.
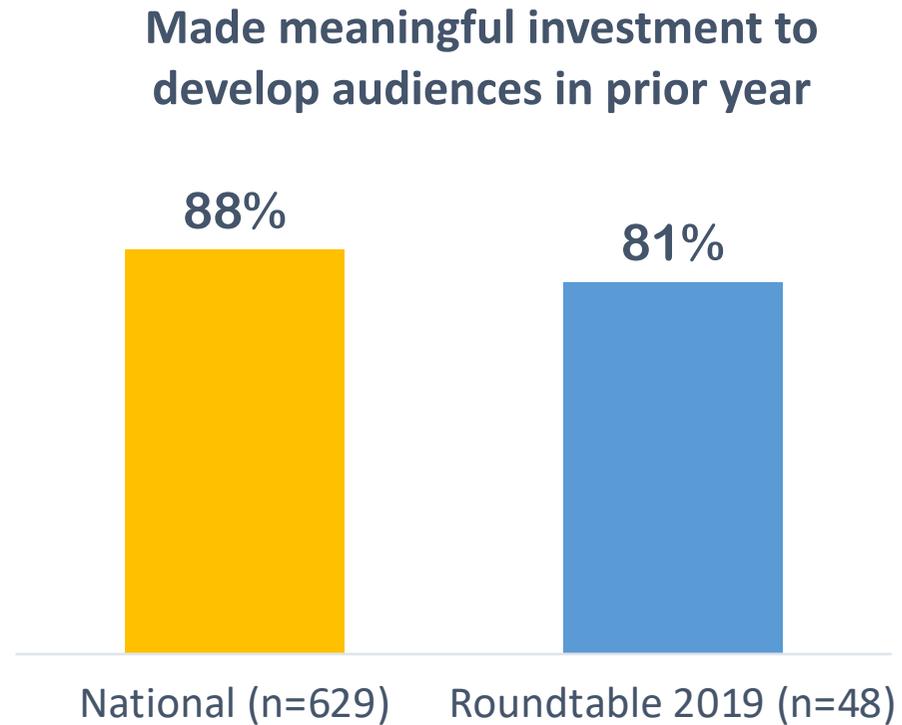
Staff Member, Large Organization

How many NEW audience building ideas has your organization tried in the past year?

	> 10
	7–10
	4–6
	1–3
	None

39%   57%   68%

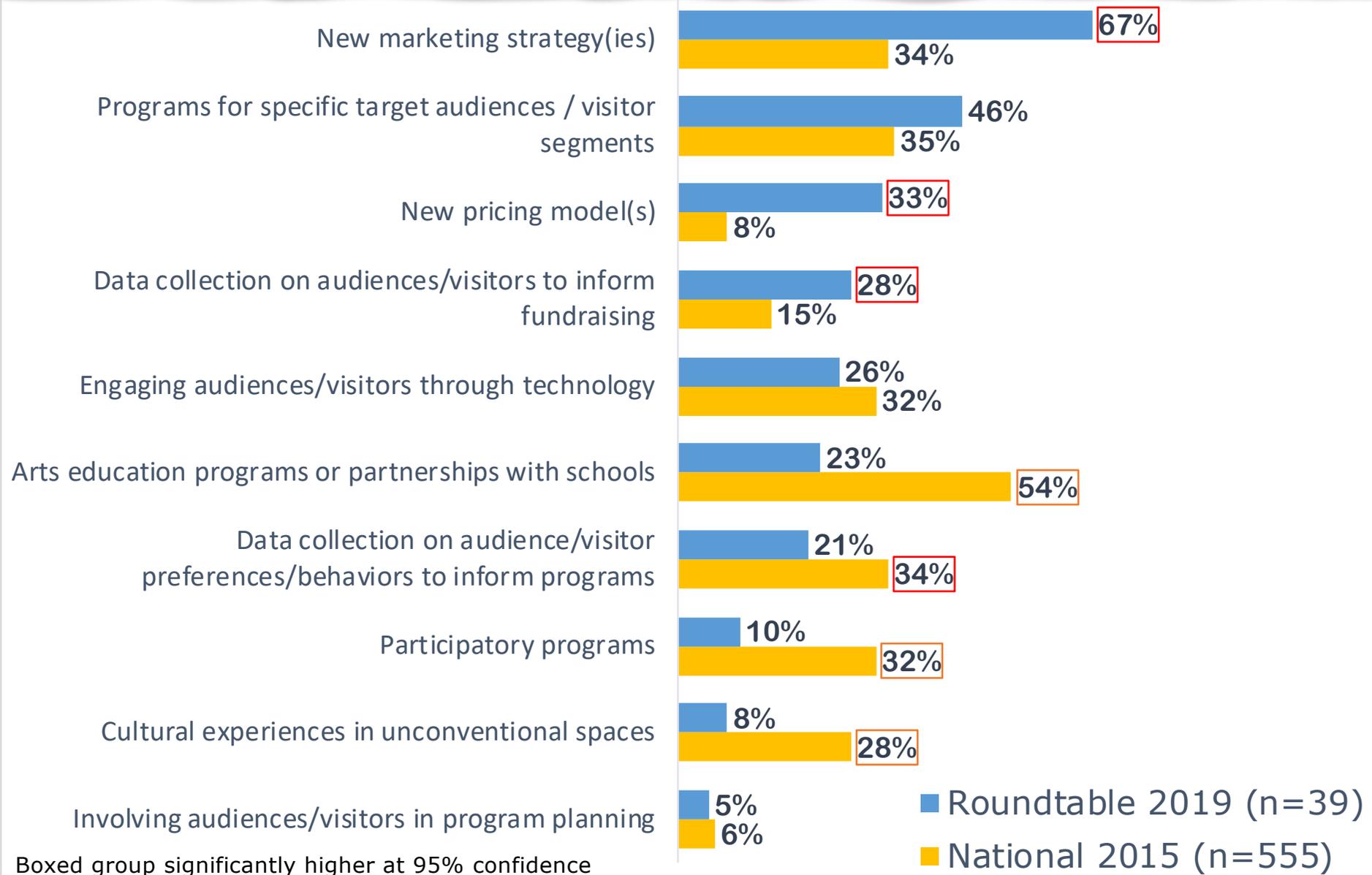| | 2017 | 2018 | 2019 |
> 10	2%	7%	11%
7–10	5%	17%	9%
4–6	32%	33%	48%
1–3	57%	41%	33%
None	4%	2%	
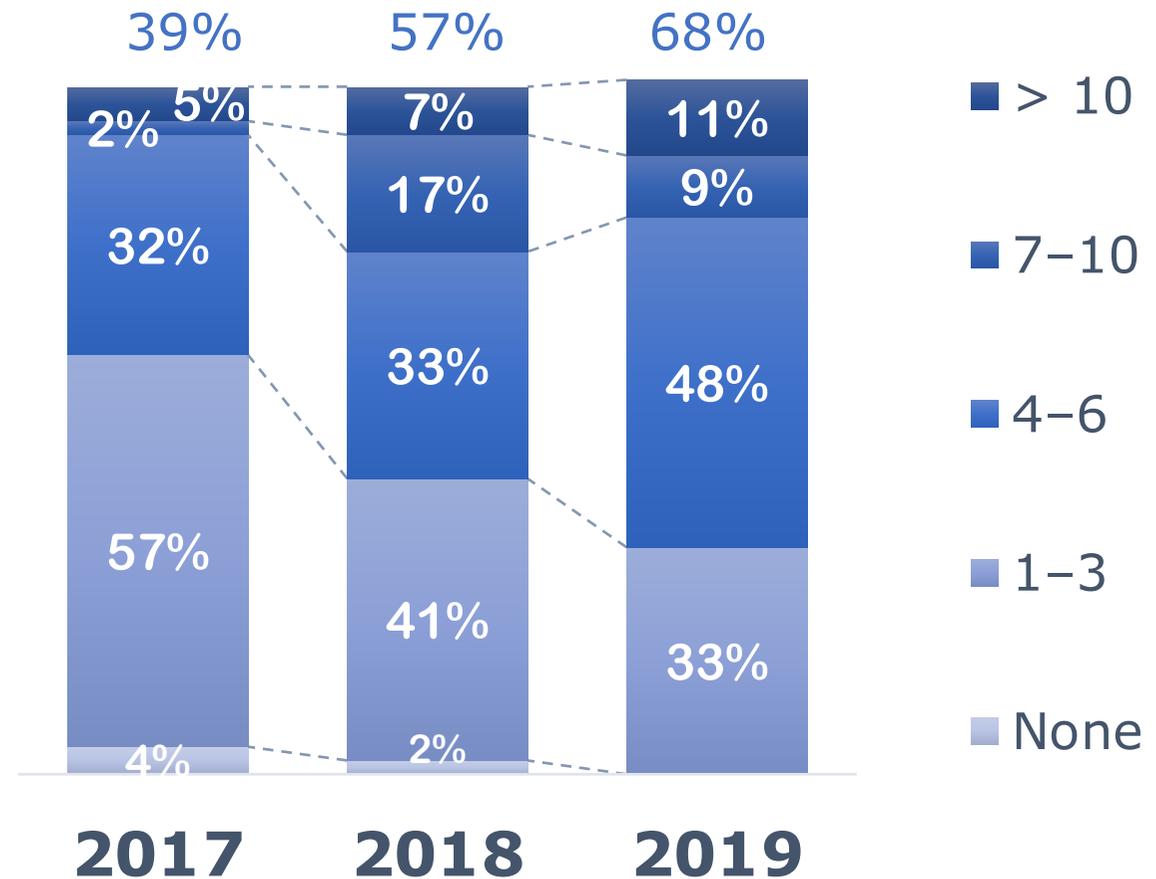
Which ideas? Investments of Roundtable members and arts groups nationwide

- Comparison data: Nonprofit Finance Fund's *2015 State of the Nonprofit Sector* survey, subsample of over 600 performing and visual arts groups
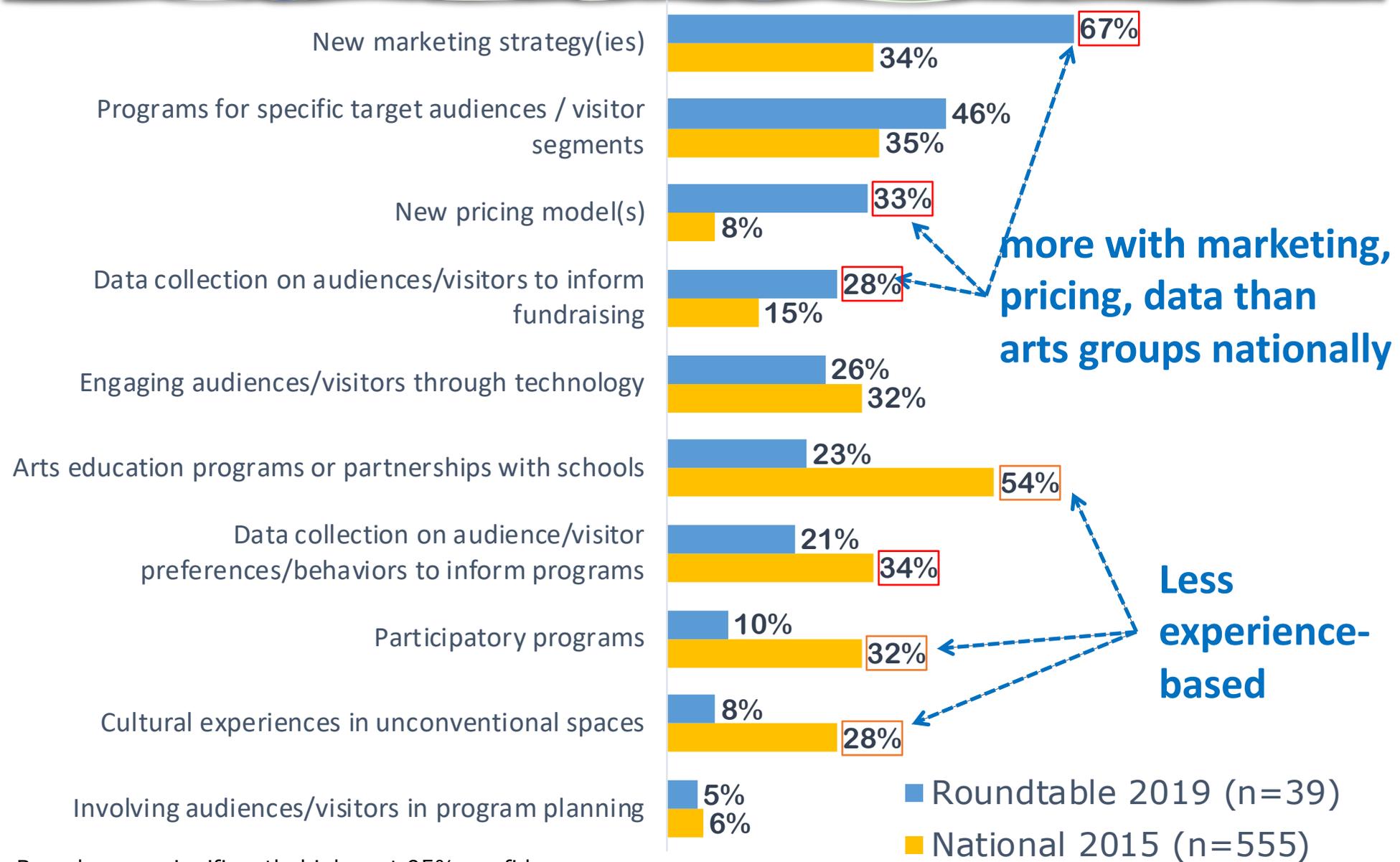
Made meaningful investment to develop audiences in prior year

88% 81%

National (n=629)   Roundtable 2019 (n=48)

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Most Significant Audience Engagement Investments (select up to 3)

New marketing strategy(ies)
- 67%
- 34%

Programs for specific target audiences / visitor segments
- 46%
- 35%

New pricing model(s)
- 33%
- 8%

Data collection on audiences/visitors to inform fundraising
- 28%
- 15%

Engaging audiences/visitors through technology
- 26%
- 32%

Arts education programs or partnerships with schools
- 23%
- 54%

Data collection on audience/visitor preferences/behaviors to inform programs
- 21%
- 34%

Participatory programs
- 10%
- 32%

Cultural experiences in unconventional spaces
- 8%
- 28%

Involving audiences/visitors in program planning
- 5%
- 6%

■ Roundtable 2019 (n=39)
■ National 2015 (n=555)

Boxed group significantly higher at 95% confidence

27

Most Significant Audience Engagement Investments (select up to 3)

New marketing strategy(ies)
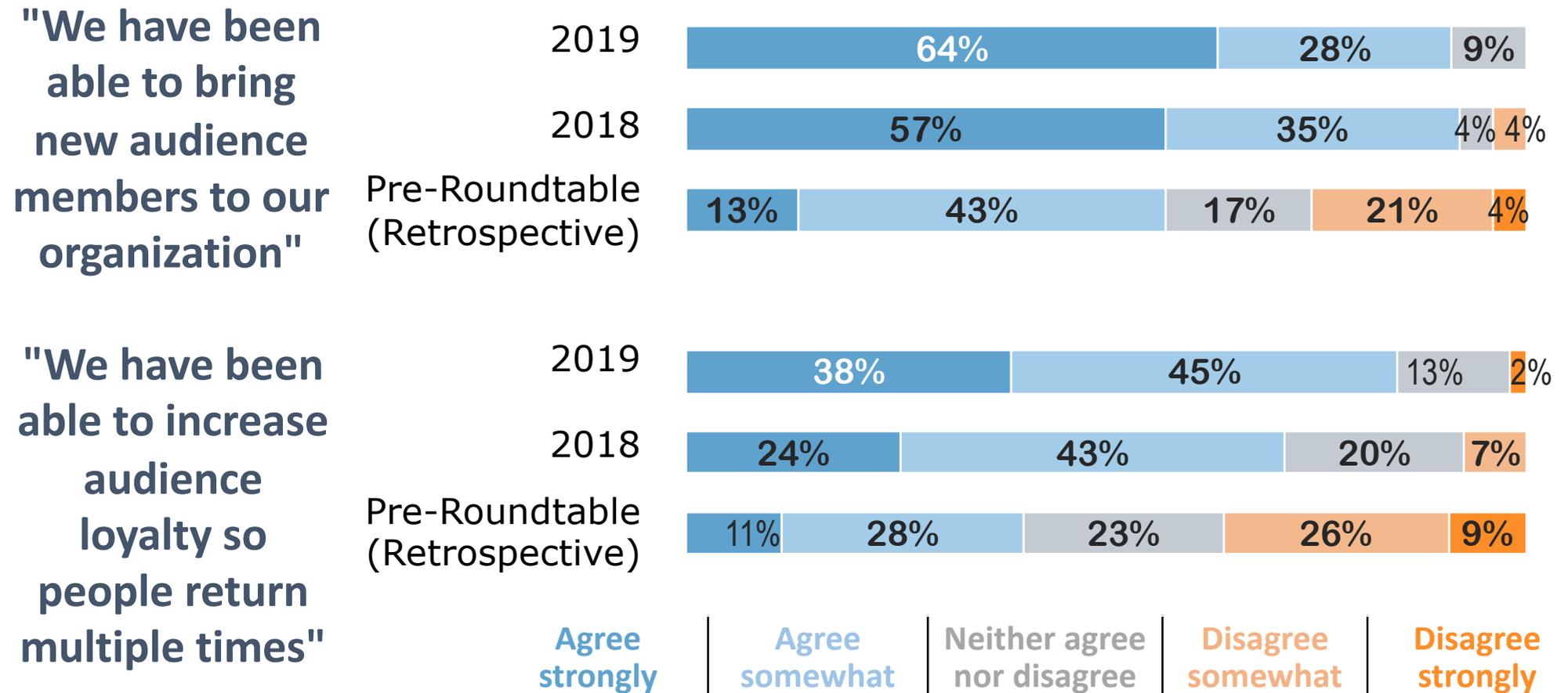- 67%
- 34%

Programs for specific target audiences / visitor segments
- 46%
- 35%

New pricing model(s)
- 33%
- 8%

Data collection on audiences/visitors to inform fundraising
- 28%
- 15%

Engaging audiences/visitors through technology
- 26%
- 32%

Arts education programs or partnerships with schools
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- 21%
- 34%

Participatory programs
- 10%
- 32%

Cultural experiences in unconventional spaces
- 8%
- 28%

Involving audiences/visitors in program planning
- 5%
- 6%

more with marketing, pricing, data than arts groups nationally

Less experience-based

■ Roundtable 2019 (n=39)
■ National 2015 (n=555)

Boxed group significantly higher at 95% confidence

28

Most Significant Audience Engagement Investments (select up to 3)

Category	Roundtable 2019 (n=39)	National 2015 (n=555)
New marketing strategy(ies)	67%	34%
Programs for specific target audiences / visitor segments	46%	35%
New pricing model(s)	33%	8%
Data collection on audiences/visitors to inform fundraising	28%	15%
Engaging audiences/visitors through technology	26%	32%
Arts education programs or partnerships with schools	23%	54%
Data collection on audience/visitor preferences/behaviors to inform programs	21%	34%
Participatory programs	10%	32%
Cultural experiences in unconventional spaces	8%	28%
Involving audiences/visitors in program planning	5%	6%

Data collection on preferences (had been higher in Roundtable prior year)

Where boxed, National sample significantly different from Roundtable at 95% confidence

29

Results of Investments to Develop/Engage Audiences

Some audience/visitor segments grew — 73% / 66%

Ticket revenue grew — 57% / 30%

We attracted an audience/visitor segment that is more representative… — 43% / 31%

Donor base grew — 38% / 33%

We attracted younger audiences/visitors — 16% / 37%

Surplus/deficit improved — 14% / 15%

The number and composition of audiences/visitors has not changed — 8% / 7%

Financial results did not improve — 5% / 14%

Some audience/visitor segments decreased — 0% / 5%

■ Roundtable 2019 (n=39)
■ National 2015 (n=555)

Where boxed, National sample significantly different from Roundtable at 95% confidence

Members say they are getting better at retention, but it is still more difficult than attracting newcomers

"We have been able to bring new audience members to our organization"

	Agree strongly	Agree somewhat	Neither agree nor disagree	Disagree somewhat	Disagree strongly
2019	64%	28%	9%		
2018	57%	35%	4%	4%	
Pre-Roundtable (Retrospective)	13%	43%	17%	21%	4%

"We have been able to increase audience loyalty so people return multiple times"

	Agree strongly	Agree somewhat	Neither agree nor disagree	Disagree somewhat	Disagree strongly
2019	38%	45%	13%	2%	
2018	24%	43%	20%	7%	
Pre-Roundtable (Retrospective)	11%	28%	23%	26%	9%

2018: *n*=46; 2019: *n*=47

31

Members say they are getting better at retention, but it is still more difficult than attracting newcomers

Over the course of three years we've reframed how we think about audience building. We have started <u>focusing</u> on people that have come once or came maybe once a few years ago but lapsed, and we're trying to draw them back.

Executive Director, Midsize Organization

We're being more deliberate about prioritizing and reaching out to people that have already come to us. We did a performance recently with another group, who we've worked with several times before. We went back to those who had attended those performances and said, "That group you enjoyed is back. We've missed you, come back."

Executive Director, Midsize Organization

Priorities have shifted, and continue to shift

Members report more energy and focus on audience building than in the past

"My organization focuses its expense budget, energy and attention on attracting its target audience(s.)"

2019	69%*
2018	55%
2017	43%

*higher than 2017 (but not 2018)
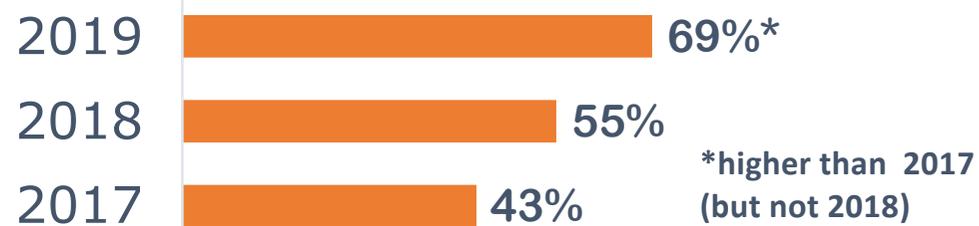
"My organization's staff structure has changed in the past year to focus on building our audience."

2019	54%
2018	64%
2017	66%

2017: *n*=45; 2018: *n*=48; 2019: *n*=45/46

Resources are allocated, but it still may not be enough: fewer than 10% agree strongly that it is

"My organization allocates sufficient resources to audience development"

	Agree strongly	Agree somewhat	Neither agree nor disagree	Disagree somewhat	Disagree strongly
2019	9%	40%	13%	26%	13%
2018	7%	41%	13%	26%	9%
Pre-Roundtable (Retrospective)	2%	23%	11%	30%	34%
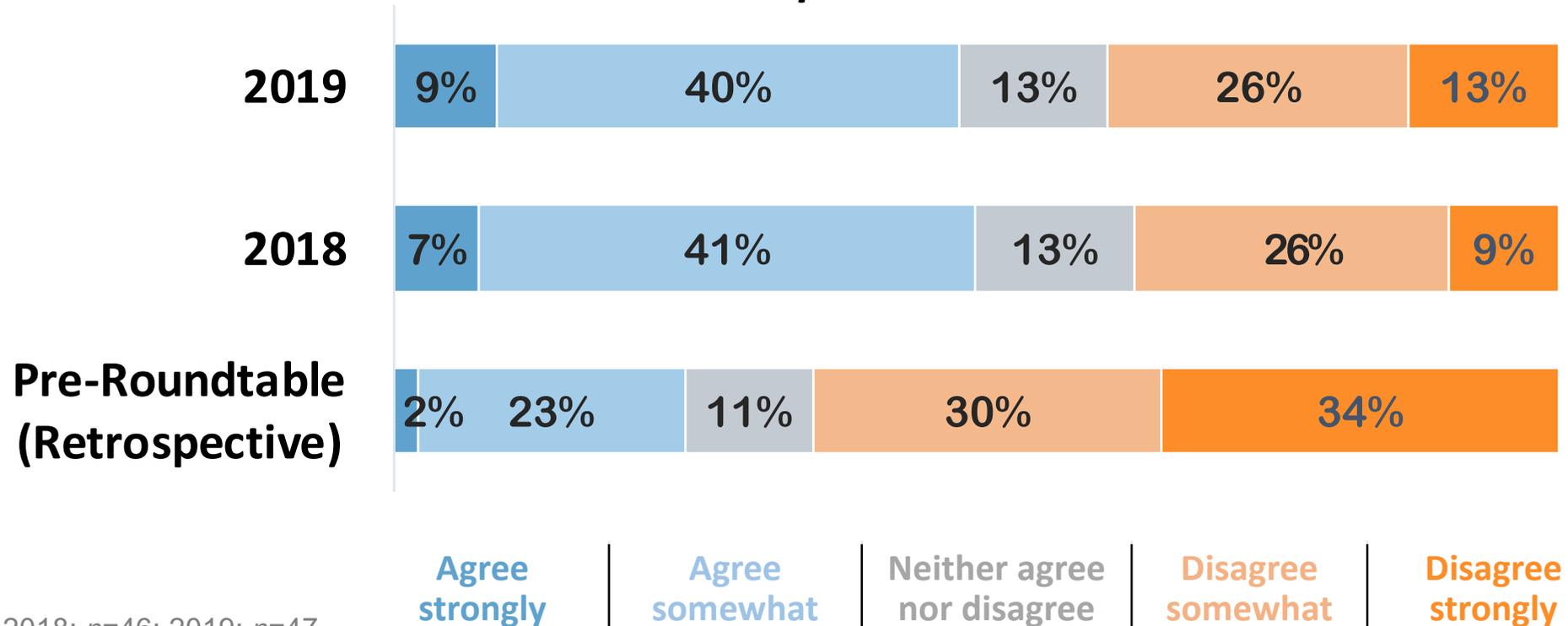
2018: *n*=46; 2019: *n*=47

Discussion about audience-building continues to trend upward among leaders

"Leaders in my organization speak often about how to cultivate deeper relationships with audience members"

2019: 60% | 23% | 6% | 11%

2018: 52% | 30% | 7% | 7% | 4%

Pre-Roundtable (Retrospective): 15% | 30% | 23% | 15% | 13%

Agree strongly | Agree somewhat | Neither agree nor disagree | Disagree somewhat | Disagree strongly
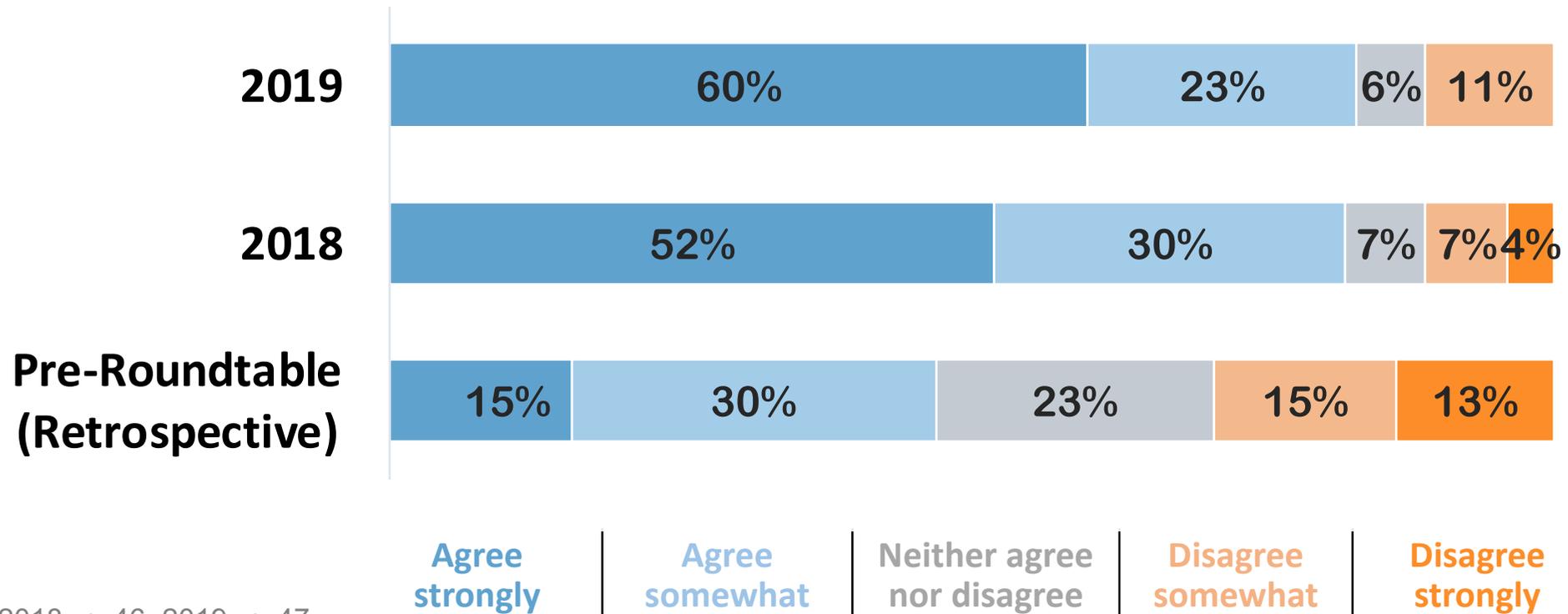
2018: *n*=46; 2019: *n*=47

Mixed on leader encouragement

"Leaders and Board in my organization have . . .

... encouraged me to apply Roundtable learning and offered financial support
- 22% (2019)
- 15% (2018)

... encouraged me to apply what I am learning in Roundtable
- 61% (2019)
- 73% (2018)

... not actively encouraged me to apply what I am learning
- 15% (2019)
- 8% (2018)

... not discussed with me what I am learning in Roundtable
- 2% (2019)
- 4% (2018)
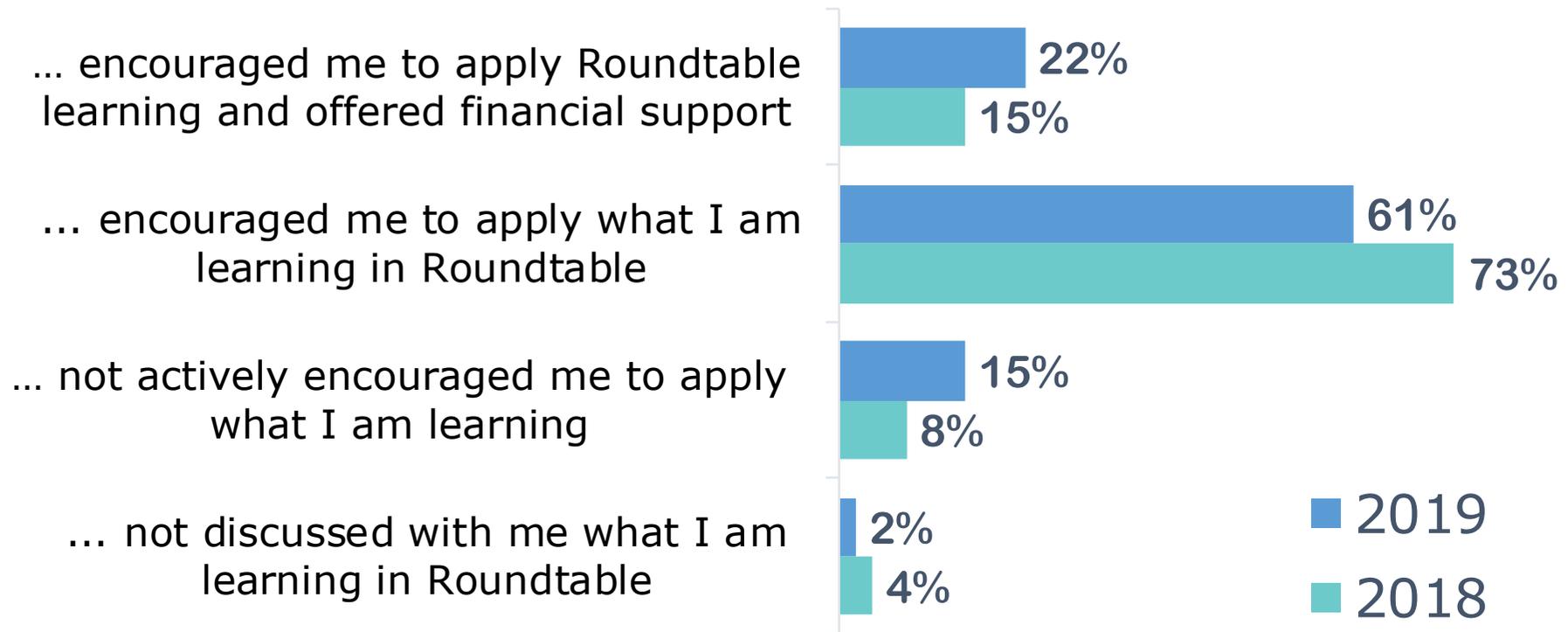
■ 2019
■ 2018

2018: *n*=48; 2019: *n*=46

Leaders who attend Roundtable see importance of audience building

Since they started attending Roundtable, audience building has become more important to...

... our chief executive	**... to board members**
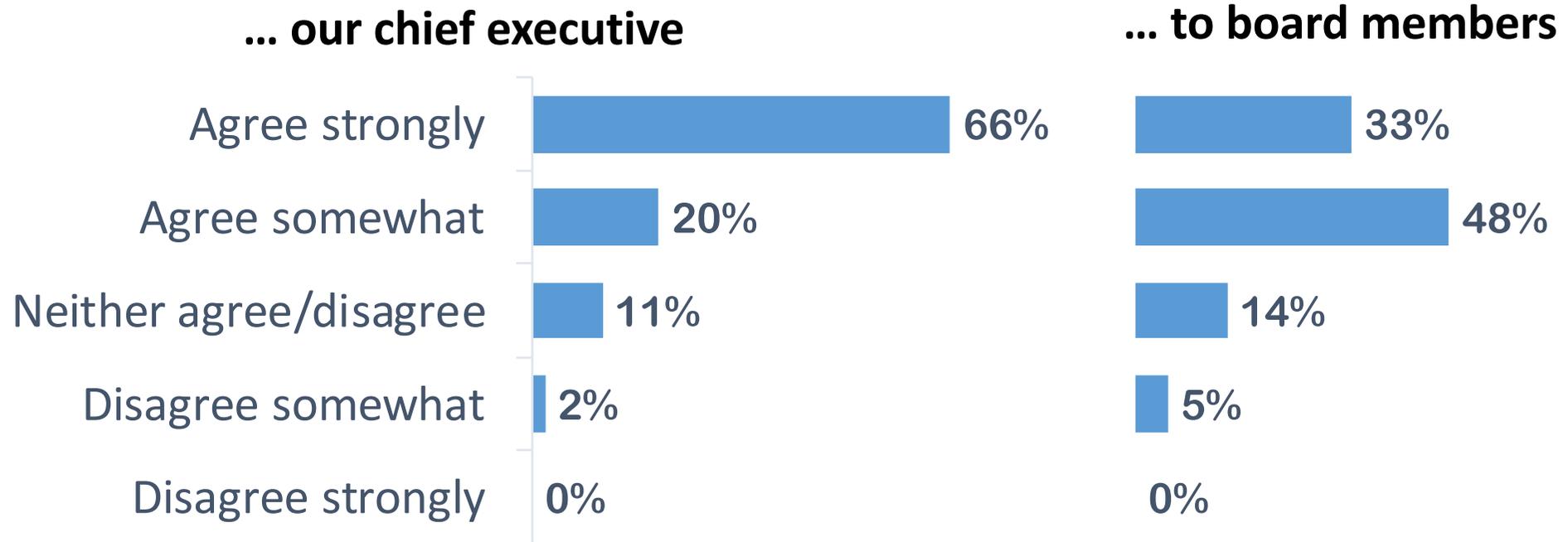
n=44/42

But is Roundtable for everyone?

> *It helped one of our board members grasp the day-to-day of what we're dealing with, instead of the corporate world that they are used to. Roundtable provided a better understanding of the underlying work that goes into the numbers that board members are used to seeing.*
>
> **Staff Member, Large Organization**

> *The board members I brought saw value in it, but I had to invite them strategically. … 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 see it as a waste of time.*
>
> **Executive Director, Small Organization**

Is Roundtable the right forum for leaders?

Going to a data-centric view of how to build audience is a little challenging for someone with an exclusively artistic worldview. It will take time for that to become an accepted input into their decision processes.

Anonymous Roundtable Member

A board members' job is not to oversee our marketing of shows. They're higher level than that. They need to be aware of it and know 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

The community is strengthening

Atmosphere in Roundtable meetings conducive to experimenting and sharing

How well does each describe the environment at Roundtable meetings

	Supportive	Professional	Collaborative	Judgmental

Supportive: 2%, 2%, 26%, 70%
Professional: 9%, 26%, 65%
Collaborative: 7%, 33%, 61%
Judgmental: 64%, 20%, 11%, 2%, 2%

Legend: Does not describe at all | 4 | neutral | 2 | Describes perfectly

n=45-46

42
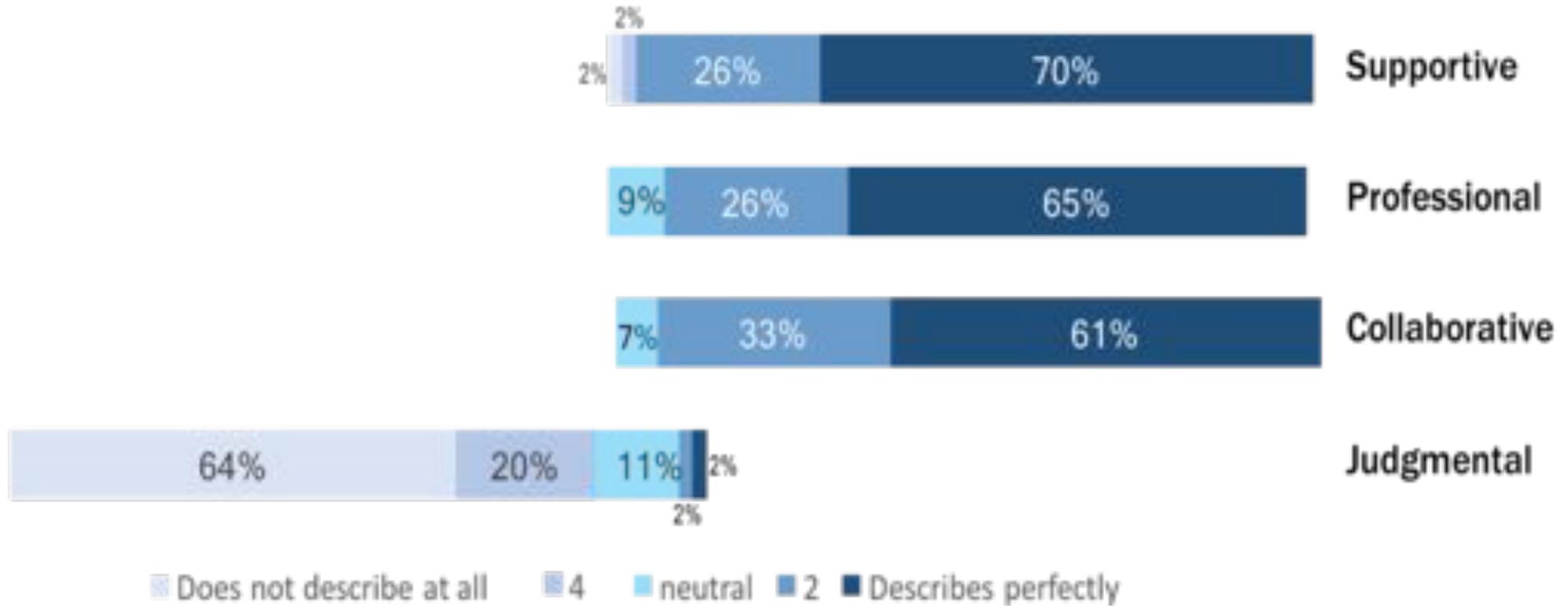
Members see tighter relationships among arts organizations

% describing relationships among arts organizations as. . .

Cooperative
- 2019: 89%
- 2018: 83%
- Pre-Roundtable: 38%

Collaborative
- 2019: 89% ▲
- 2018: 70%
- Pre-Roundtable: 40%

Open
- 2019: 79%
- 2018: 65%
- Pre-Roundtable: 38%

Competitive
- 2019: 32%
- 2018: 39%
- Pre-Roundtable: 61%

Legend:
- 2019
- 2018
- Pre-Roundtable (Retrospective)

2018: *n*=46; 2019: *n*=44–45

▲ Significantly higher than prior year at 95% confidence

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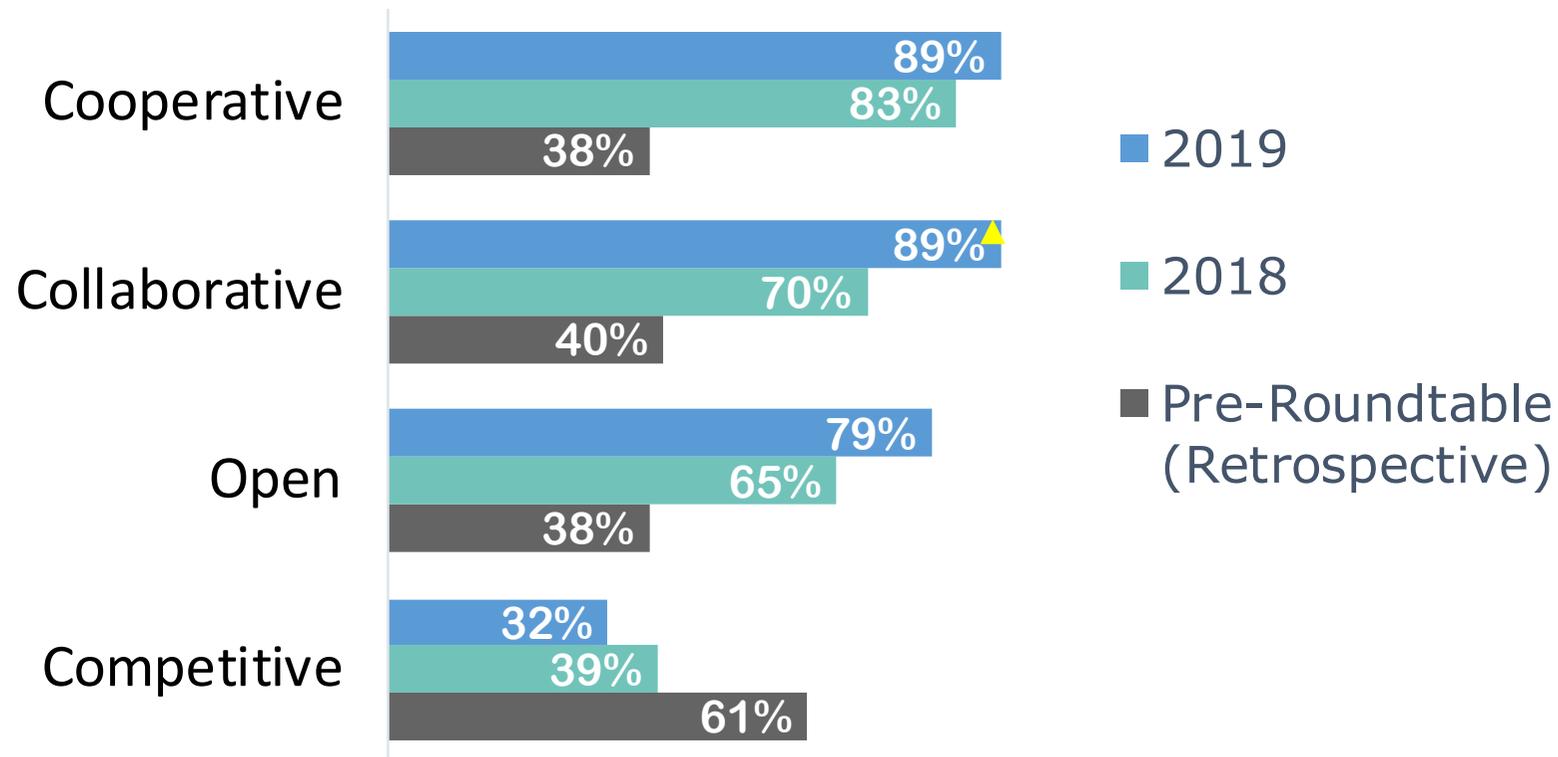
A community with shared resources and outcomes.

> *Everyone used to be very polite but closed. We're more comfortable disagreeing and really talking because we're seeing each other as a greater community.*
>
> **Staff Member, Large Organization**

> *What's come of it is so much more openness to share.*
>
> **Executive Director, Large Organization**

Communication pathways are more open, trending upward

"How often do you..."

Share advice on audience-building strategies?

	More than once per month	Each month	Several times per year	Rarely	Never
2019	19%	38%	38%	4%	
2018	13%	48%	35%	4%	
Pre-Roundtable (Retrospective)	4%	22%	52%	17%	

Share advice on other work-related issues?

	More than once per month	Each month	Several times per year	Rarely	Never
2019	19%	32%	36%	11%	2%
2018	13%	39%	37%	11%	
Pre-Roundtable (Retrospective)	2% 7%	33%	41%	13%	

More than once per month	Each month	Several times per year	Rarely	Never

BOB HARLOW
Research and Consulting

Collaboration and resource sharing has risen

"How often do you..."

Share audience-building resources such as e-mail lists, mailing blasts?

2019 — 13% ▲ | 21% | 32% | 17% | 15%

2018 — 2% | 20% | 33% | 33% | 13%

Pre-Roundtable (Retrospective) — 2% 7% | 24% | 30% | 33%

Collaborate on joint projects to grow audiences?

2019 — 13% | 9% | 45% | 23% | 11%

2018 — 7% | 13% | 37% | 33% | 11%

Pre-Roundtable (Retrospective) — 7% | 17% | 46% | 24%

| More than once per month | Each month | Several times per year | Rarely | Never |

2018: *n*=46; 2019: *n*=47

▲ Significantly higher than prior year at 95% confidence

What's continued to move up

- Data use:
    - Know how to retain/grow audience
    - To target messages and programs
- Trying more new ideas
- Ability to increase loyalty
- Leaders talk more about audiences
- More collaborative community
- Sharing audience-building resources

What's stayed stable (many high after first year)

- Solidified gains in knowledge
- Collect visitor data
- Monitor digital analytics
- Organizational priority of audience building
- Philosophies and ways of working are changing
- Resources still not sufficient?

Audience-Building Roundtable Intended Outcomes

Short-term

Stronger field capacity to promote peer interaction/ networking, share best practice (1)

Greater awareness of strategies (from peers and experts) (2)

More risk taking/trying new things (3)

Arts groups view audience holistically as customers to develop relationships with (not just sell tickets to) (4)

Intermediate

Change in philosophy, whereby arts groups undertake this work and become more audience-centric (5)

Organization (leaders as a team) rally around audience building (6)

Systemic change in using data to understand audiences, and act on that data (7)

Long-term

Re-align resources/ investments for audience development (8)

Greater financial stability (9)

Deeper relationships, increases in loyalty, less churn, audience growth (10)

Audience-Building Roundtable Intended Outcomes

Stronger field capacity to promote peer interaction/ networking, share best practice **1**

Greater awareness of strategies (from peers and experts) **2**

More risk taking/trying new things **3**

Arts groups view audience holistically as customers to develop relationships with (not just sell tickets to) **4**

Change in philosophy, whereby arts groups undertake this work and become more audience-centric **5**

Organization (leaders as a team) rally around audience building **6**

Systemic change in using data to understand audiences, and act on that data **7**

1. Which of these outcomes do you believe is most important to your ability to grow and retain audiences?

2. Which is second-most important?

3. In what area would you most like to make more progress?

4. In what area have we made the most progress since the beginning of the Audience Building Roundtable?

Bob Harlow
Research and Consulting

As organizations, what is most important in designing audience-building strategies that work?

A.) Making audiences happy

B.) Making our organization happy
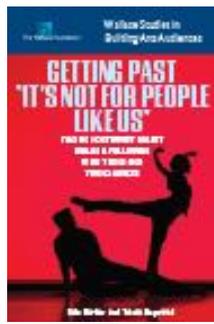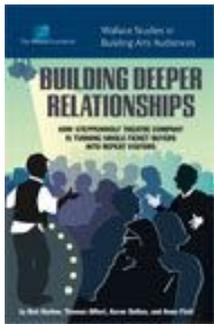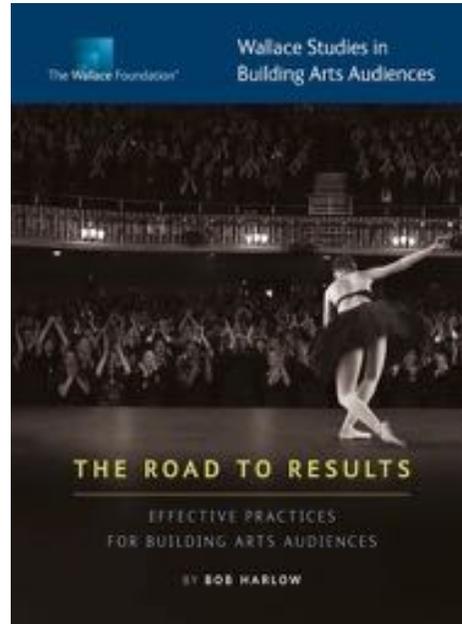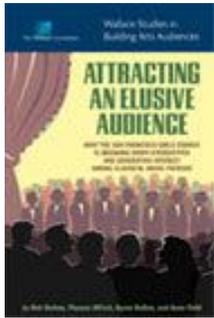
Where do new initiatives get stuck?

Changing mindsets and attitudes	58%
Culture	49%
Complexity underestimated	35%
Shortage of resources	33%
Management not committed	32%
Lack of know-how	20%
Lack of motivation	16%
Change of process	15%
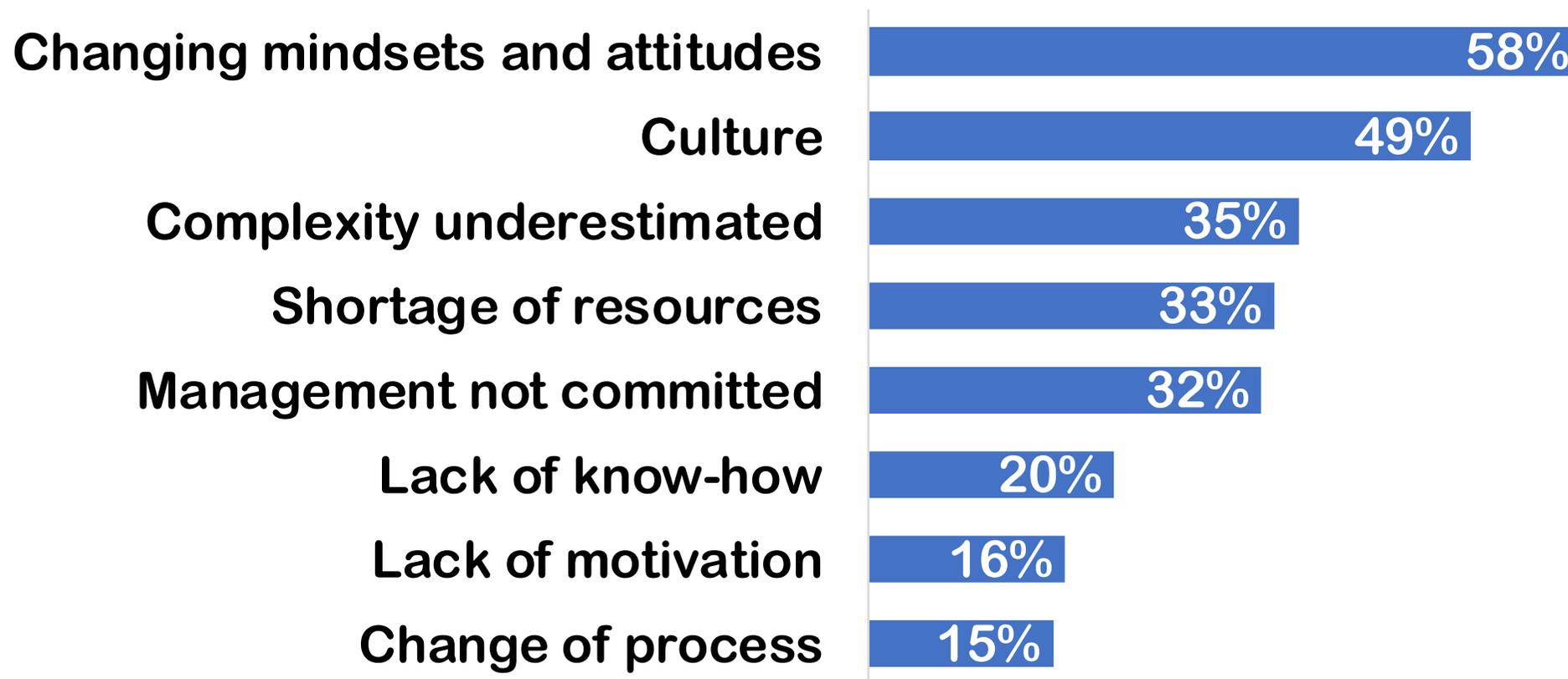
Source: IBM Corp., *Majority of organizational change projects fail*
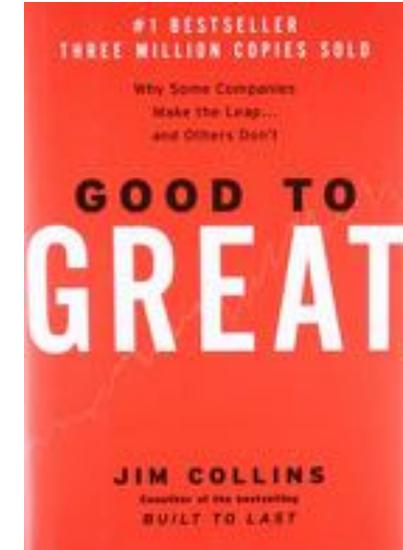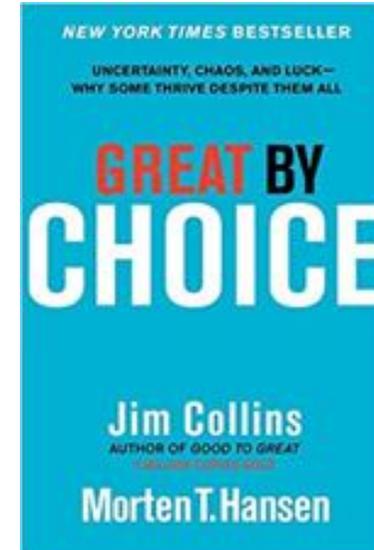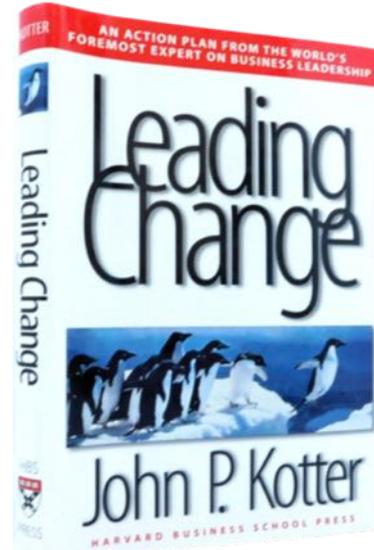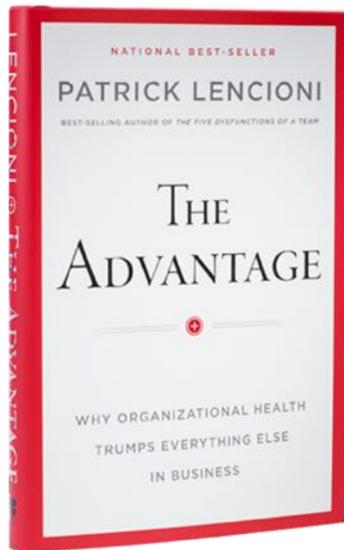
Successful Audience Building Requires Attention to Both Audience and Organization

- Leaders and staff need to agree audience makes sense to pursue (clarity and consensus)
  - Continued investment and attention, clear direction
  - Needs to be consistent with our mission and values, or we won't stick with it
  - A sense of urgency, that "failure is not an option"
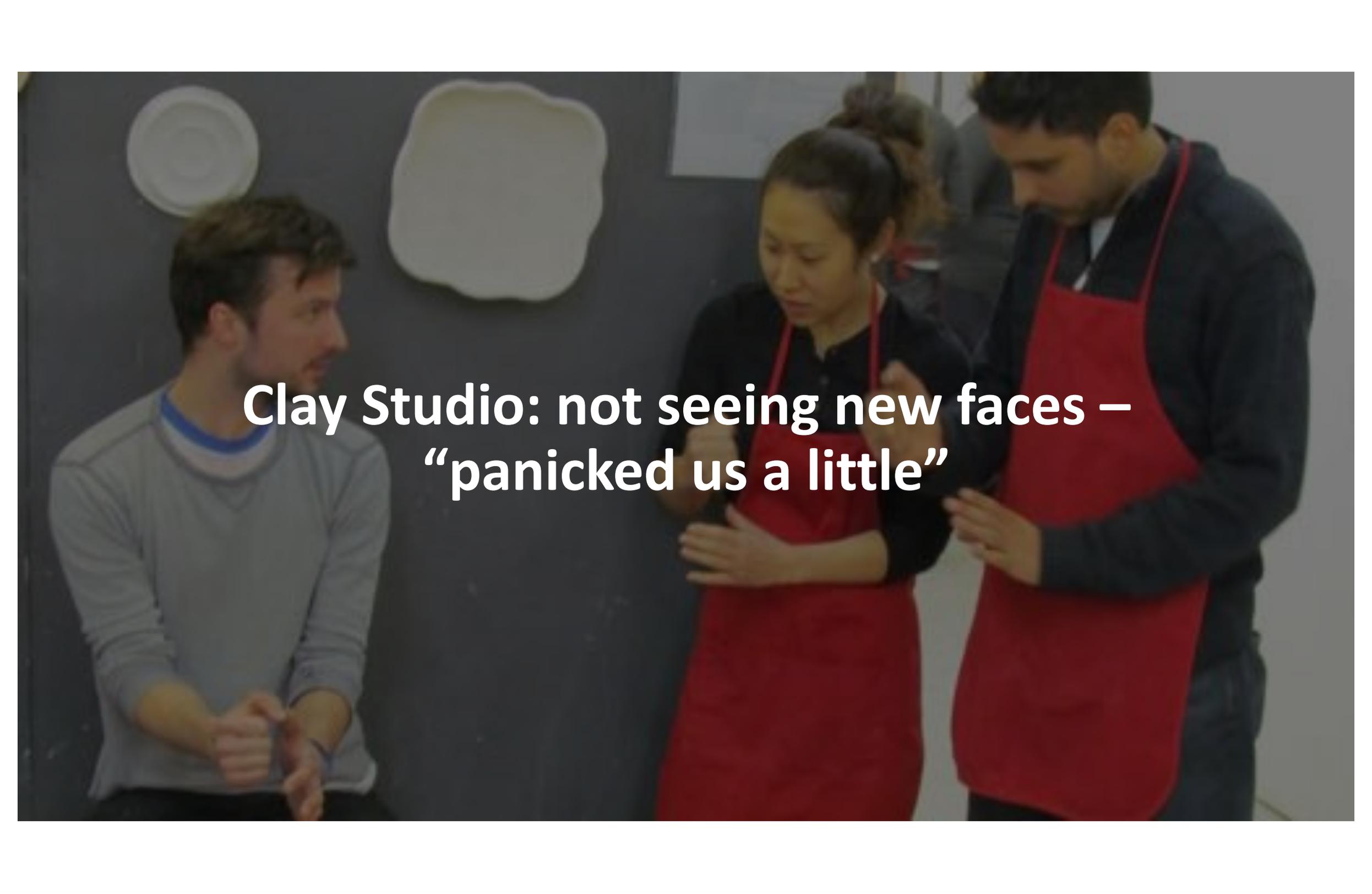
Peter Boal, Pacific Northwest Ballet:

Sense of urgency: "My darkest fear is that in 80 years, we won't have ballet"

• **Curious about audience experience, personally invested in giving teens and young adults ways in: "They need to feel they are welcome."**

Clay Studio: not seeing new faces – "panicked us a little"

Date Night

Handcrafted

We had this tagline, 'Shaping the future of ceramics,' which was great but that was for us. Not so much for the audience. That was a real eye-opener. People would say to us in focus groups, 'Why would I look at this? Why would that make me want to come? I've got to look at something and right away see there's something there for me.'

– **Amy Sarner Williams, former president and CEO**

Artistic director Jeff Guido: *We learned that you need to be simple, clear, and concise. You need to use language that is relatable to them.*

Q: *Are you concerned that you're dumbing it down?*

A: *How is your work meaningful if no one gets it?*

SCHOOL REVENUE (IN $THOUSANDS)

New marketing

New programs

$499
$496
$446
$378
$322
$308
$277
$266
$211
$182
$148
$155
$132
$150

2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

Atmosphere at Roundtable meetings aligns with characteristics of "Learning Organizations"

How well does each describe the environment at Roundtable meetings
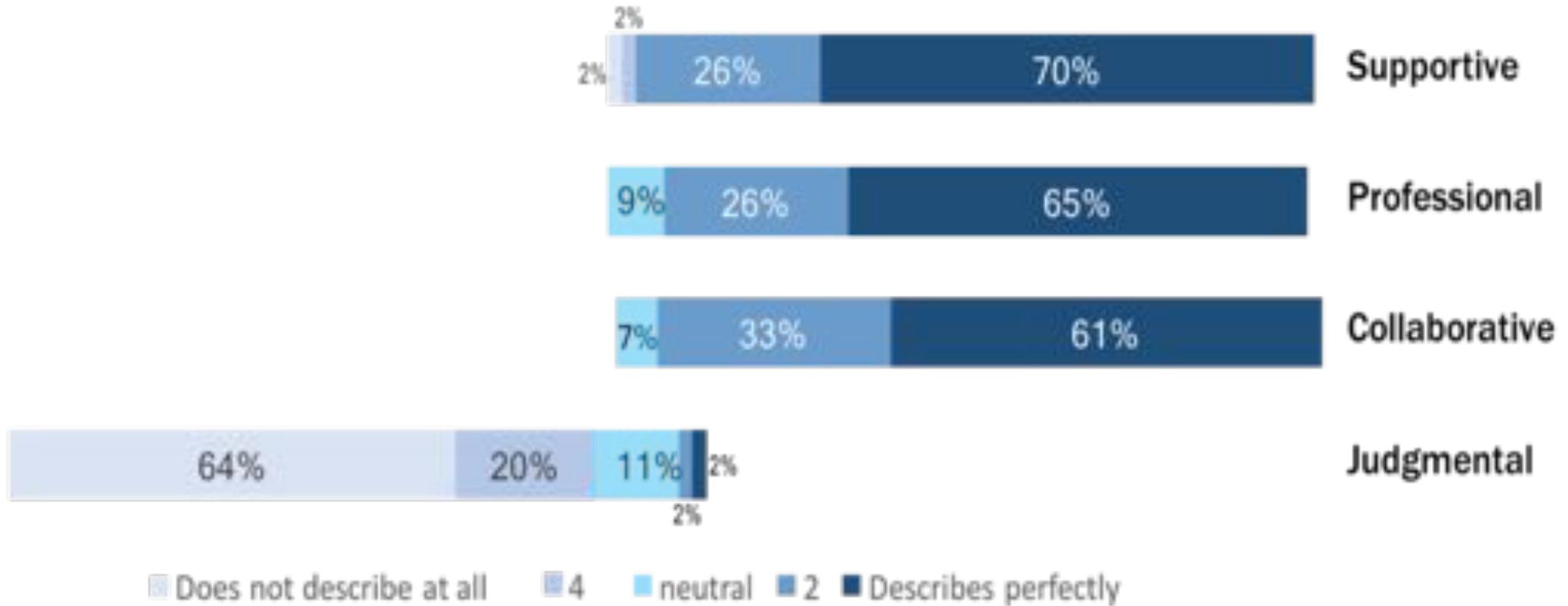
n=45-46

Three building blocks of learning organizations

1. A supportive learning environment
   - Openness to new ideas
   - Time for reflection

2. Concrete learning processes and practices
   - Experimentation
   - Intelligence gathering (competitive, customer, and technological trends)
   - Analysis and interpretation to identify and solve problems
   - Information sharing

3. Leadership that reinforces learning
   - Inviting input, asking questions, listening, providing time and resources for experimentation and reflection